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Accounts and Sub Accounts
What is the hierarchical structure for Canvas accounts?

The terms account and sub-account are organizational units within Canvas. Every instance of Canvas has the potential to contain a hierarchy of accounts and sub-accounts but starts out with just one account (referred to as the root account). Accounts include subaccounts, courses, and sections, all of which can be added manually in Canvas, via the API, or via SIS imports.

View Hierarchy

Institutions can create a hierarchical structure to best fit the needs of their institution. Users with an admin role can be assigned to specific sub-accounts with specific account-level permissions.

Account-level permissions are initially set by the root account admin and trickle down through the hierarchy but not up. Admins for sub-accounts can modify account-level permissions for their sub-account. Admins in one account have administrative permissions within that account as well as in any sub-accounts of that account. Additionally, an admin can move a course within its sub-account, but they cannot move a course between sub-accounts unless they are also the admin of the parent account of each sub-account.

With the exception of Terms, SIS imports, Authentication, and a few account settings, most admin account settings can be modified or, in the case of permissions, overridden in a sub-account. For more information about account-level permissions, view the Canvas Account Level Permissions PDF.
View Subaccounts

Sub-accounts are often used to manage permissions and organizational hierarchy within an institution. Many institutions set up sub-account organizational structures that mirror their SIS or registration systems. For example, sub-accounts can be created for individual colleges within a university, or for schools within a district. Sub-accounts can also be created within sub-accounts, such as when a college subdivides into departments that subdivide into programs, or a school that subdivides into grade levels that subdivide into specific subjects.

Admins, other Canvas users, and courses can be assigned to sub-accounts. A user can hold different roles in each sub-account. For example, a college dean who also teaches courses at their institution can be assigned as an admin in their college account and assigned a teacher role in a sub-account.

Sub-accounts can also be used to create and access question banks, outcomes, rubrics, grading schemes, reports, and analytics. Although terms cannot be created in sub-accounts, many institutions create terms at the root account that can be used by specific sub-accounts so each can have different access dates.

Organize accounts based on:

- Departments then Term Dates. For example: Science Department; Fall 2012/Spring 2013/Summer 2013
- Departments then Sub-Departments. For example: Science Department; Physics/Biology/Chemistry
- Departments then Sub-Departments then Course Type. For example: Science Department; Biology; Face to Face/Blended/Fully Online
- School then Grade-level. For example: K12 School; First Grade

**View Courses and Sections**

Courses are added to an account or subaccount [1]. Courses are the virtual classroom where all the content resides and where student users can learn and interact with instructors and peers.

Sections are a group of students that have been organized for administrative purposes [2]. When users are enrolled in a course, they are actually enrolled in one of the sections of that course. It is possible to place more than one section in course, but it is not possible to put sections within sections. All sections of a course share the same content.

If a course is taught by one instructor, sections can remain under one course. However, if each section is taught by a different instructor, those sections will need to be housed under separate courses.
Section Options

Each section can have its own varied due dates for assignments, quizzes, and discussions. For example, a course may have sections that meet on different days of the week or in different formats (online vs. face-to-face).

Sections are also beneficial when Teacher Assistants are assigned to help manage courses and oversee grading for a portion of a course enrollment. As part of SIS or manual enrollments, you can limit students to only see students in their section. Instructors can also limit students if you allow them to manually enroll users in their own courses.

Note: Admins and instructors cannot restrict sections from accessing course content (i.e, Assignments, Discussions, Quizzes, etc.). This can be done using groups for each section and assigning content to specific groups.
How do I view and manage a sub-account?

As an admin, you can view and manage sub-accounts in Canvas. Sub-accounts help establish your account's hierarchical structure and house courses and enrollments.

All of your institution's sub-accounts are located within the root account. However, sub-accounts can include additional nested sub-accounts, and sub-account admins can view a list of all the sub-accounts in their account.

Sub-accounts can be created and managed manually or via SIS upload. Additionally, sub-accounts created via API or SIS upload retain the identifiers given in the original source. You can edit sub-account names to make them easier to find within Canvas.

View a video about Sub-Accounts.

Notes:

- Sub-accounts that contain courses cannot be deleted.
- Each root account automatically includes a sub-account called Manually-Created Courses that manages multiple backend processes for Canvas and cannot be deleted.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Sub-Accounts

In Account Navigation, click the **Sub-Accounts** link.
# View Sub-Account

<table>
<thead>
<tr>
<th>Sub-Account</th>
<th>Courses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Biology</strong></td>
<td>6 Courses</td>
</tr>
<tr>
<td><strong>Business</strong></td>
<td>4 Sub-Accounts</td>
</tr>
<tr>
<td><strong>Accounting</strong></td>
<td>3 Courses</td>
</tr>
<tr>
<td><strong>Computer Science</strong></td>
<td>1 Course</td>
</tr>
<tr>
<td><strong>Economics</strong></td>
<td>2 Courses</td>
</tr>
<tr>
<td><strong>Marketing</strong></td>
<td>2 Courses</td>
</tr>
</tbody>
</table>

Sub-accounts are listed in alphabetical order. To view a sub-account, click the sub-account name.
Collapse and Expand Sub-Account List

Many Canvas accounts contain multiple sub-accounts with nested sub-accounts. To more easily navigate within sub-accounts, you can collapse sub-account lists, hiding them from view.

To collapse a list of sub-accounts, click the **Up Arrow** icon [1].

To expand a list of sub-accounts that have been collapsed, click the **Down Arrow** icon [2].
## Add Sub-Account

<table>
<thead>
<tr>
<th>Sub-Account</th>
<th>Courses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biology</td>
<td>6</td>
</tr>
<tr>
<td>Business</td>
<td>4</td>
</tr>
<tr>
<td>Accounting</td>
<td>3</td>
</tr>
<tr>
<td>Computer Science</td>
<td>1</td>
</tr>
<tr>
<td>Economics</td>
<td>2</td>
</tr>
<tr>
<td>Marketing</td>
<td>2</td>
</tr>
</tbody>
</table>

To [create a sub-account](#), click the Add button.

## Manage Sub-Account

<table>
<thead>
<tr>
<th>Sub-Account</th>
<th>Courses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>4</td>
</tr>
<tr>
<td>Accounting</td>
<td>3</td>
</tr>
<tr>
<td>Computer Science</td>
<td>1</td>
</tr>
<tr>
<td>Economics</td>
<td>2</td>
</tr>
</tbody>
</table>
To edit the name of a sub-account, click the Edit icon [1]. Edit the name of the sub-account by typing in the name field. To save your changes, press the Return key (on a Mac) or Enter key (on a PC) on your keyboard.

To delete a sub-account, click the Delete icon [2].

**Note:** Sub-accounts that contain courses cannot be deleted.

**Confirm Sub-Account Deletion**

Are you sure you want to delete this sub-account?

[Cancel] [OK]

When you delete a sub-account, a pop-up window will appear in your browser. Click the **OK** button.
How do I create a sub-account?

You can create sub-accounts in Canvas. Sub-accounts help establish your account's hierarchical structure and house courses and enrollments. Sub-accounts can be created manually or via SIS upload.

View a video about Sub-Accounts.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Sub-Accounts

In Account Navigation, click the Sub-Accounts link.

Show Accounts

Click the down arrow to show sub-accounts.
Add Sub-Account

Business
4 Sub-Accounts

Accounting
3 Courses

Computer Science
1 Course

Economics
2 Courses

Marketing
2 Courses

Click the Add button.
Enter a title for the sub-account in the title field. Press Return (on a MAC keyboard) or Enter (on a PC keyboard).
### View Sub-Account

<table>
<thead>
<tr>
<th>Business</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4 Sub-Accounts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounting</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Courses</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Computer Science</td>
<td>+</td>
<td></td>
<td>+</td>
</tr>
<tr>
<td></td>
<td>1 Course</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Economics</td>
<td>+</td>
<td></td>
<td>+</td>
</tr>
<tr>
<td></td>
<td>2 Courses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marketing</td>
<td>+</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 Courses</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Business Law</strong></td>
<td></td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

View the created sub-account.
How do I add an admin to an account?

You can add a user as an admin to an account in Settings.

When you assign a user as an admin in the root account, that user has all privileges in any sub-account. You might consider assigning users as admins only in the sub-account for which they are responsible.

Once you add a user, if they already have a profile in Canvas, they will receive an email notifying them that they are now an admin for the account. If an added user does not already have a profile, they will receive an email with a link to create a profile and access the account.

Notes:

- To add a user as an admin, you must assign the user to an account role. Before adding a user, ensure that you have created the necessary account-level role.
- Your administrative user list includes the Conditional Release API, Outcomes Service, and Quizzes.Next Service, which are currently included in all accounts for MasteryPaths, Outcomes, and Quizzes.Next. The API users will be removed from the list in a future release.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Settings

In Account Settings, click the Settings link.

Open Admins

Click the Admins tab.

Add Account Admins

Click the Add Account Admins button.
Add Admin Role and Email

In the Add More drop-down menu [1], set the admin role type. The default admin role in Canvas is Account Admin which has access to all account-level permissions. You can also create admin roles for your institution and manage their permissions.

In the text box [2], type the email address of the user.

Click the Continue... button [3].
Add Account Admins

Add Account Admins

Add More [Account Admin]

1. Andy Admin
   andy.ad.canvas@gmail.com

2. OK Looks Good, Add This 1 User

3. Go back and edit the list of users

Verify the user you added is listed in the admin field [1]. Select the OK Looks Good, Add this [?] User button to add the admin [2]. Click the Go back and edit the list of users link to adjust any errors [3].

A message will appear in your browser.

Verify New User

1 user added

Verify the new administrative user was added.
How do I manage themes for an account?

Each Canvas account displays a default Canvas theme. As an admin, you can create and manage themes using Canvas templates, or you can create a theme specifically designed for your institution.

Custom branding is hosted at the account level, and by default, sub-accounts and their associated courses inherit account branding. However, you can choose to allow sub-accounts to use the Theme Editor to create their own custom themes. When the Theme Editor is enabled for sub-accounts, any design elements they do not specifically change will inherit the account level design.

Note: If you are a sub-account admin and the Themes link is not visible in Account Navigation, Themes has not been enabled for sub-accounts.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Themes

In Account Navigation, click the Themes link.

**Note:** If sub-account themes have been enabled, each sub-account also includes a Themes link. To open the Theme Editor for a sub-account, click the Sub-Accounts link to locate and open the sub-account, then click the sub-account’s Themes link.
View Theme Sections

The Themes page displays all available templates and saved themes for your institution.

All default themes for Canvas display in the Templates section [1]. Default templates are used as a starting point for admins to create their own themes and cannot be deleted.

Once a theme is saved in the account, the page displays the My Themes section [2]. My Themes shows all themes saved for the account.
Open Theme

To open and view any theme, hover over the theme and click the Open in Theme Editor button.

Create Theme
To create a theme, open and modify your preferred template [1], or click the Add Theme button [2]. You can also create a theme based on a saved template.

**View Current Theme**

Once a theme is applied to the account, the theme is marked as the current theme. The current theme includes a green bar and check mark icon below the name of the theme. If an account includes multiple saved themes, the active theme is ordered first.

To apply a different theme, open and apply any other saved theme or create a new theme for the account.

**View Multiple Active Themes**

If multiple themes display an information icon, each theme includes the same set of values that are being applied as the current theme. To delete one of the themes, locate the theme and click the Delete icon.
Delete Theme

To delete a saved theme, click the **Delete** icon.

**Note:** The current theme cannot be deleted. To delete the current theme, open and apply any other saved theme or create a new theme for the account.
How do I create a theme for an account using the Theme Editor?

As an admin, you can use the Theme Editor to create custom themes for your institution. Themes are created from existing Canvas templates. Any theme applied to the account also applies to all subaccounts, though the Theme Editor can also be used to create themes for individual subaccounts. Once you have created and saved a theme, you can apply the theme to your account at any time. You can also create new themes based on previous themes. Learn how to manage saved themes.

View a video about the Theme Editor.

Theme Inheritance

Custom branding is hosted at the account level, and by default, sub-accounts and their associated courses inherit account branding. However, you can enable sub-accounts to use the Theme Editor; any elements that are not specifically changed will still be inherited by the account level.

User enrollments are associated at the account level and course enrollments are associated at the sub-account level. An enrollment is created when a user and a course are joined together. If a user is not enrolled in any courses, the Dashboard displays branding for the account. This algorithm also relates to pages not associated with a course including user account and settings, Calendar, and Conversations. User data is always hosted at the account level, which is why they cannot inherit sub-account branding.

If a user is enrolled in a course in the account, the Dashboard displays the branding for the account. If a user is enrolled in a course within a sub-account, the Dashboard displays the branding for the sub-account. If a user is enrolled in courses within multiple sub-accounts, or if one of the courses is in the account, the Dashboard displays the branding for the account.

Theme Editor Components

For details about the Theme Editor components, including components that display on Canvas apps, please view the Canvas Theme Editor Components PDF. For help with image templates, view the Canvas Theme Editor Image Templates PDF. Logos, images, and watermarks are not visible for users who enable the High Contrast Styles feature option in user settings.

CSS/JS Files

Custom cascading style sheets (CSS) or JavaScript (JS) files are not required, but override files are also supported in the Theme Editor. CSS/JS file functionality must be enabled by your Customer Success Manager. Before uploading custom CSS or JS files, please be aware of the associated risks, as custom files may cause accessibility issues or conflicts with future Canvas updates. Learn more about custom CSS/JS restrictions.

Notes:

• The Theme Editor is not available for two-week trial or Free-For-Teacher accounts.
If you are a subaccount admin and the Themes link is not visible in Account Navigation, Themes has not been enabled for sub-accounts. If the CSS/JS Upload tab is not visible, file uploads have not been enabled for sub-accounts.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Themes

In Account Navigation, click the Themes link.

Note: If sub-account themes have been enabled, each sub-account also includes a Themes link. To open the Theme Editor for a sub-account, click the Sub-Accounts link to locate and open the sub-account, then click the sub-account’s Themes link.

Open Theme Template
If you do not yet have a Canvas theme for your account, use a template to create a new theme. You can choose from the Default Canvas template, a minimalist template, and a State U. template. If your Customer Success Manager has enabled the K12-specific feature option, the K12 Theme also appears as a template.

To create a new theme, hover over a template and click the **Open in Theme Editor** button [1], or click the **Add Theme** button [2] and select a template from the list.

### Open Saved Theme

If you previously created and saved a theme, you can edit saved themes at any time. Saved themes display in the My Themes section. To open a saved theme, hover over the name of the theme and click the **Open in Theme Editor** button [1].

To create a new theme based on a saved theme, click the **Add Theme** button [2] and select the name of the saved theme from the list. This option helps you avoid overwriting your previously saved theme.
View Theme Editor

The Theme Editor displays a sample page to preview your custom branding. These components will change with the colors and branding that you add using the Theme Editor.
View CSS/JS Upload Tab

If custom cascading style sheets (CSS) or JavaScript (JS) override files have been enabled for your account, the Theme Editor sidebar displays an **Edit** tab [1] and an **Upload** tab [2]. The Theme Editor defaults to the Edit tab and shows all the Theme Editor components. The Upload tab allows you to upload custom files.
Locate Components

The Theme Editor has four component groups: Global Branding, Global Navigation, Watermarks & Other Images, and Login Screen. By default, the Theme Editor sidebar displays the Global Branding group.

Locate the component you want to customize. You can expand and collapse groups by clicking the arrow icon next to the group heading.
Select Color via CSS

The default value for each component is faded in the text field.

To specify a color component, locate the component text field and enter a new CSS color. You can enter colors via hex code, RGB value, or valid color name.

**Note:** Entered colors will convert and display as hex codes.
Select Color via Color Selector

In browsers that support native color inputs, the color selector can be used to choose a value. Locate the component and click the color box. The color selector will appear in a new window.
The color selector window defaults to the color wheel, but you can use any of the color tab options to locate a color [1]. Once a color is selected, the component will display the new color in the box [2]. The component's hex color will also update with the new color value.
Add Images

For components that require images, locate the component and click the Select Image link. The image description will include supported file types.

Preview Theme

Set Canvas' default text color using the Text Input field in the Editor. Check this text after you change it to see your edits.

Text input

To preview your theme, click the Preview Your Changes button.

Canvas will generate the preview of the components based on your template changes. If necessary, make additional changes and preview your theme again.
Save Theme

Once you are satisfied with your template changes, save your theme by clicking the Save Theme button.

Create Theme Name

If you modified a theme from a template, the Theme Editor creates a copy of the theme. Templates cannot be edited directly. In the Theme Name field [1], enter a name for your theme. Click the Save Theme button [2].

Note: If you edited a previously saved theme, saving the theme overwrites the previous version of the theme and uses the same theme name.

Apply Theme

To apply your theme to your account, click the Apply theme button [1].
To exit the theme and return to the Themes page, click the **Exit** button [2]. You can open the theme and apply it to your account at any time.

To apply the theme to your entire account, click the **OK** button [1]. To return to the Theme Editor, click the **Cancel** button [2].

**Note**: If your account allows subaccounts to customize their own themes, any applicable changes you made will also filter down to any associated sub-accounts. Canvas shows the status of your Theme Editor updates; when the process for each subaccount is complete, the subaccount disappears from the progress window. When all subaccounts have been updated, the Theme Editor redirects back to the Themes page.
How do I upload custom JavaScript and CSS files to an account?

In Canvas, you can use the [Theme Editor](#) to brand your account. However, if you want to apply additional branding that is currently not supported in the Theme Editor, you can upload custom cascading style sheets (CSS) and JavaScript (JS) files to your account. Files are hosted directly in Canvas. Any theme applied to the account also applies to all sub-accounts, though you can upload CSS/JS files for individual sub-accounts.

The Theme Editor supports desktop and mobile upload files. Standard CSS/JS files are applied to HTML pages in the Canvas desktop application, which can include the login page for mobile devices. Mobile CSS/JS files are only applied to user content displayed within the Canvas iOS or Android apps, as well as in third-party apps using the Canvas API, but mobile files do not apply to user content displayed in mobile browsers.

Custom JavaScript and CSS files are subject to the same account and sub-account branding inheritance rules as when creating a theme in the Theme Editor.

Before adding custom JavaScript and CSS files, you must contact your Customer Success Manager to enable custom branding for your account or sub-account.

**Custom File Risks**

If you cannot use the native Theme Editor options for branding, you must be aware of the associated risks of using custom files, which may cause accessibility issues or conflicts with future Canvas updates:

- You should have advanced understanding of JavaScript and CSS and must maintain your own code.
- Custom files may conflict with future changes to the Canvas DOM (eg: element class names or HTML structure) and are therefore not supported. Instructure disclaims any liability for any changes made to your custom override files.
- You are responsible to review web content accessibility guidelines to ensure your files meet any web accessibility testing or other compliance standards that may be required in your jurisdiction. You are responsible for making your modifications accessible to screen readers, users with text contrast and color contrast needs, and users relying on High Contrast Styles as a user feature option.
- When experimenting with custom branding, always confirm your branding changes in your institution's beta environment or test environment.

**Notes:**

- The Theme Editor is not available for two-week trial or Free-For-Teacher accounts.
- If you are a sub-account admin and the Themes link is not visible in Account Navigation, Themes has not been enabled for sub-accounts. If the CSS/JS Upload tab is not visible, file uploads have not been enabled for sub-accounts.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Themes

In Account Navigation, click the Themes link.

**Note:** If sub-account themes have been enabled, each sub-account also includes a Themes link. To open the Theme Editor for a sub-account, click the Sub-Accounts link to locate and open the sub-account, then click the sub-account’s Themes link.

Open Theme Template
If you do not yet have a Canvas theme for your account, use a template to create a new theme. You can choose from the Default Canvas template, a minimalist template, and a State U. template. If your Customer Success Manager has enabled the K12-specific feature option, the K12 Theme also appears as a template.

To create a new theme, hover over a template and click the **Open in Theme Editor** button [1], or click the **Add Theme** button [2] and select a template from the list.

**Open Saved Theme**

If you previously created and saved a theme, you can edit saved themes at any time. Saved themes display in the My Themes section. To open a saved theme, hover over the name of the theme and click the **Open in Theme Editor** button [1].

To create a new theme based on a saved theme, click the **Add Theme** button [2] and select the name of the saved theme from the list. This option helps you avoid overwriting your previously saved theme.
Upload Custom Files

In the Theme Editor sidebar, click the **Upload** tab.
To upload files for the Canvas desktop application, locate the CSS file/JavaScript file headings [1]. To upload files for user content in Canvas mobile and third-party apps, locate the Mobile app CSS file/JavaScript file headings [2].

Locate the file type you want to upload and click the Select button [3], then locate the file on your computer.

Locate additional files for upload, if required.

**Preview Theme**

Set Canvas' default text color using the Preview Theme Editor. Check this text after you change it to see your edits.

**Text input**
To preview your theme, click the **Preview Your Changes** button.

Canvas will generate the preview of the components based on your uploaded files.

### Manage Files

To manage your files, click the **Upload** tab again [1].

To remove and upload a new file, click the **Remove** icon [2]. You can make additional changes and upload your revised file.

To view the code for your file, click the **View File** link [3]. As the file is stored directly in Canvas, use this link if you ever need to download the file.

### Save Theme

Once you are satisfied with your template changes, save your theme by clicking the **Save Theme** button.
Create Theme Name

If you modified a theme from a template, the Theme Editor creates a copy of the theme. Templates cannot be edited directly. In the Theme Name field [1], enter a name for your theme. Click the Save Theme button [2].

Note: If you edited a previously saved theme, saving the theme overwrites the previous version of the theme and uses the same theme name.

Apply Theme

To apply your theme to your account, click the Apply theme button [1].

To exit the theme and return to the Themes page, click the Exit button [2]. You can open the theme and apply it to your account at any time.

Note: If your account allows sub-accounts to customize their own themes, any applicable changes you made will also filter down to any associated sub-accounts. Canvas shows the status of your Theme Editor updates; when the process for each sub-account is complete, the sub-account disappears from the progress window. When all sub-accounts have been updated, the Theme Editor redirects back to the Themes page.
Admin Tools
How do I see which notifications have been sent to a user in an account?

You can view the notifications received by individual students with the View Notifications tool.

Note: You must talk to your Customer Success Manager to enable this feature before you can use it. After your Customer Success Manager enables the feature, you should enable the View Notifications permission for the appropriate roles.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Admin Tools

In Account Navigation, click the Admin Tools link.

Open View Notifications

Click the View Notifications tab.
Search for Student

View Notifications

To view all notifications sent to a Canvas user, select the user and date range for your search.

In the search field [1], type the name of the student and click the Find button [2]. Click the student's name [3].
Enter Date Range

Create the date range you want to search. You can enter dates in the From Date and To Date date fields [1], or you can use the calendar icon to select dates [2]. Then click the Find button [3].
View Notifications Sent to User

Notifications sent to Jane Smith from Jan 8 at 12am to Apr 9 at 12am.

Canvas Alert
To  @txt.att.net
From  Biology 101 <notifications@instructure.com>
Created at  Mar 13 at 12am
Sent at  Mar 13 at 12am

  New announcement: New Announcement Test, Biology 101
  delayed
  More info at documentation.instructure.com

View the notifications sent to the user from Canvas.
How do I view login and logout activity for a user in an account?

Within Admin Tools, admins can view the login/logout activity of users within their institution. Log activity is organized by date with the most recent activity at the top of the list.

Notes:

- Canvas will only register a user’s logout when the Logout button is clicked in the User Account menu. Closing the browser window does not create a logout request.
- Logging activity will only show activity that took place within the past year.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Admin Tools

SIS Import
Themes
Developer Keys
Canvas Data Portal
Canvas Parent Tools
Admin Tools
Settings

In Account Navigation, click the Admin Tools link.

Open Logging

Admin Tools

Restore Courses  View Notifications  Logging

Search for a deleted course by ID

Course ID  Find

Click the Logging tab.
Select Log Type

From the log type drop-down menu, select the **Login / Logout Activity** option.

Search for User

Type the name of the user in the search field [1], then click the **Find** button [2]. Click the user’s name [3].
Enter Date Range

Create the date range you want to search. You can enter dates in the From Date and To Date date fields [1], or you can use the calendar icon to select dates [2]. Then click the Find button [3].

Find Logging Activity

Click the Find button.
View Logging Activity

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apr 6, 2018</td>
<td>10:11am</td>
<td>LOGIN</td>
</tr>
<tr>
<td>Apr 4, 2018</td>
<td>10:12am</td>
<td>LOGIN</td>
</tr>
<tr>
<td>Mar 28, 2018</td>
<td>12:53pm</td>
<td>LOGIN</td>
</tr>
<tr>
<td>Mar 27, 2018</td>
<td>3:54pm</td>
<td>LOGIN</td>
</tr>
<tr>
<td>Mar 27, 2018</td>
<td>8:48am</td>
<td>LOGOUT</td>
</tr>
<tr>
<td>Mar 27, 2018</td>
<td>8:48am</td>
<td>LOGIN</td>
</tr>
<tr>
<td>Mar 26, 2018</td>
<td>2:25pm</td>
<td>LOGIN</td>
</tr>
<tr>
<td>Mar 22, 2018</td>
<td>12:12pm</td>
<td>LOGIN</td>
</tr>
</tbody>
</table>

View the login/logout activity for the user.
How do I view grade change activity for an account?

As an admin, you can view grade change activity for your account without having to access the API or grade history page. You can view grade changes by grader and by student. You can also view grade change logs for specific courses and assignments using the course and assignment numbers.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Admin Tools

In Account Navigation, click the Admin Tools link.

Open Logging

Click the Logging tab.
Select Log Type

Admin Tools

From the log type drop-down menu, select the Grade Change Activity option.
Search for Grade Change

To view grade change activity results, search by choosing between grader, student, course id, or assignment id.

1. **Grader** allows you to search by grader name (e.g. instructor or TA)
2. **Student** allows you to search by student name
3. **Course Id** allows you to search by course. You can locate your course id number at the end of your course URL (i.e. canvas.instructure.com/courses/XXXXXX).
4. **Assignment Id** allows you to search by assignment. You can locate your assignment id number at the end of your course URL (i.e. canvas.instructure.com/courses/assignments/XXX).
5. **From/To Date** allows you to narrow your search parameters by date range.

**Note:** When typing an individual's name into either the grader or student field, Canvas will automatically generate a list of matching names. Canvas will not accept entries in the grader and student fields that are not selected from the drop-down list of Canvas users. Currently, the assignment and course id can only be searched if the id is known.
View Grade Change Activity

Enter search criteria in the appropriate field and click the Find button [1]. Canvas will display any applicable results for the field you selected. In the example above, the search generated all activity based only on the Grader [2]:

- The **date** the grade was changed
- The **time** the grade was changed
- The previously assigned grade it was changed **from**; the dash (-) indicates there was no previously assigned grade and an **EX** indicates the assignment was excused
- The new grade it was changed **to**
- The **grader** who assigned the grade change
- The **student** who received the grade change
- The **course** in which the grade was changed
- The **assignment** for which the grade was changed
- Whether or not the grader selected the Hide Student Names (**anonymous**) option in SpeedGrader settings
How do I view course activity for an account?

As an admin, you can generate a course activity log for a course in your account. This log includes a time-stamped overview of all activity for a course, including user name, activity type, source, and a link to view the activity details.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Admin Tools

In Account Navigation, click the Admin Tools link.

Open Logging

Click the Logging tab.
Select Log Type

From the log type drop-down menu, select the Course Activity option.

Search by Course Name or Course ID

Search by course ID or course name [1]. You can locate your course id number at the end of your course URL (i.e. canvas.instructure.com/courses/XXXXX).
Once you start to type the course information, Canvas will generate a drop-down list of matching Canvas courses. Results are based on valid field entries, so if no results appear (especially if searching by name), confirm the information and try again.

You can also enter a date range in the date fields [2]. Dates are not required, but adding dates will narrow your results.

Find Course Activity

Click the Find button.

View Course Activity

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>User</th>
<th>Type</th>
<th>Source</th>
<th>Event Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep 25, 2017</td>
<td>5:30pm</td>
<td>Erin Hallmark</td>
<td>Updated</td>
<td>Manual</td>
<td>View Details</td>
</tr>
<tr>
<td>Sep 25, 2017</td>
<td>2:13pm</td>
<td>Doug Roberts</td>
<td>Updated</td>
<td>Manual</td>
<td>View Details</td>
</tr>
<tr>
<td>Sep 25, 2017</td>
<td>11:51am</td>
<td>Erin Hallmark</td>
<td>Updated</td>
<td>Manual</td>
<td>View Details</td>
</tr>
<tr>
<td>Sep 25, 2017</td>
<td>11:50am</td>
<td>Erin Hallmark</td>
<td>Updated</td>
<td>Manual</td>
<td>View Details</td>
</tr>
</tbody>
</table>

Canvas will display any applicable results for the field(s) you selected:

- The **Date** of the activity
- The **Time** of the activity
- The **User** who performed the activity
- The **Type** of activity (concluded, unconcluded, published, deleted, restored, updated, created, copied to, copied from, reset to, and reset from)
- The **Source** of the activity (manual or via API)
- The **Event Details** of the activity type (click View Details link)
How do I restore a deleted course in an account?

An admin can restore courses that have been reset or deleted. You must know the Course ID number to restore the course. If your instructor cannot locate the Course ID number, you can access the instructor’s user details and look for the Course ID under Page Views. The Course ID can be found by viewing the number at the end of the browser URL of a page view in the deleted course (e.g. account.instructure.com/courses/XXXXXX).

Restoring a course restores the previous course URL and all content. However, enrollments cannot be restored.

Note: Using an SIS ID will not restore a course unless the course was deleted via SIS.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Admin Tools

Click the Admin Tools link.

Enter Course ID

In the Course ID field [1], enter the Course ID of the course you want to restore. Click the Find button [2].
Restore Course

When the course appears, click the **Restore** button.

**Course ID:** 219  
**Account ID:** 1  
**Course Code:** Photography 1010  
Enrollments to this course must be restored manually.
Confirm Course Undelete

Admin Tools

Search for a deleted course by ID

219  

Find

Photography 101010 has been restored!

What would you like to do next?

View Course  Add Enrollments

Canvas will confirm you have restored your course.

To view the course, click the View Course button [1]. To add user enrollments into the course, click the Add Enrollments button [2].
Analytics
How do I view Account Analytics?

You can view account Analytics from your Account Courses page. You can also view analytics as part of the account Statistics page. Account Analytics show aggregate data for all course activity in your account, including an overview of the number of courses and users and the activity types with which users engage.

If you need to view account analytics on a more granular level, you can open the course and view analytics for that course.

Note: Account analytics also includes analytics enabled at the sub-account level.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Account Analytics

In Account Navigation, click the Analytics link.

View Term Overview

Account analytics shows you how many Courses, Teachers, Students, Assignments, Submissions, Discussion Topics, Files Uploaded, and Media Recordings there are for a selected term. By default, the account shows analytics for the Default Term. Terms are ordered alphabetically.

To view analytics for a different term, click the next or previous buttons in the term menu [1], or locate the term in the dropdown menu [2].

For each term, Analytics includes the following overview:

- **Courses** indicates the number of courses that are published in the account. This number does not count unpublished courses or deleted courses.
- **Teachers** indicates how many unique teachers have had activity within the selected term. If one user is a teacher in 5 courses, the statistic will count as 1 teacher.
• **Students** indicates the same statistics as teachers but relates to students.
• **Assignments** indicates the number of assignments submitted to active courses.
• **Discussion Topics** indicates the number of discussion topics posted to active courses.
• **Files Uploaded** indicates the number of files uploaded to the account. Deleted files do not count here.
• **Media Recordings** indicate the number of media objects uploaded to active courses, such as video, audio, and music files.

### View Analytics Graphs

By default, analytics are shown in a graph format. There are three types of graphs: Activity by Date, Activity by Category, and Grade Distribution.

### View Activity by Date

The Activity by Date graph shows all account activity for all users enrolled in a course for the term. The x-axis represents the term dates, while the y-axis represents the number of page views. Dark blue bars represent participation in the account. If a date only includes page views, the bar displays as light blue.

The graph changes the bar display according to the length of time. Activity that is less than six months old displays bars as daily activity, at six months bars are displayed as weekly activity, and at approximately a year bars are displayed as monthly activity. The weekly view shows the first and last date for the week; the monthly view shows the month and the year. To view the details of the bar graph, hover over the specific bar you want to view. Browser window size, zoom level, and screen resolution may also change how the bars display.

The following user actions will generate analytics participation:

• Announcements: posts a new comment to an announcement
• Announcements: posts an announcement (instructor)
• Assignments: updates an assignment’s settings or description (instructor)
• Assignments: submits an assignment (student)
• Calendar: updates a calendar event’s settings or description (both instructor courses and student calendar events)
• Collaborations: loads a collaboration to view/edit a document
• Conferences: joins a web conference
• Discussions: posts a new comment to a discussion
• Files: uploads or views files or folders
• Grades: views or updates the gradebook or grades page, uploads files to the gradebook, creates a grading standard
• Groups: views content within groups
• Modules: views or creates content in modules
• Pages: creates a wiki page
• Quizzes: submits a quiz (student)
• Quizzes: starts taking a quiz (student)

If you need to view page views for a specific user on a more granular level, learn how to view page views for users in your account.

View Activity by Category

The View Activity by Category graph shows all activity in the account by feature category. The x-axis represents activity by category, while the y-axis represents the number of page views. The General category refers to the top level page views of the course that are not counted in the more specific categories, which include the Course Home Page, the course roster (People page), Course Settings, and the Syllabus.

The Other category refers to all the other page views that were not recognized.

To view the details of the bar graph, hover over the specific bar you want to view.
View Grade Distribution

The Grade Distribution graph shows the distribution of current course grades for all enrolled students. The x-axis represents the percentage of grades, while the y-axis represents the percentage of active and concluded enrollments. If the course has been concluded, the x-axis represents the running-total grade.

The graph bars are shown as peaks representing the grades for the majority of students on the continuum. A peak on the left end of the chart could mean students are struggling in a course. A peak on the right end of the chart could mean students are responding to course material and are participating in the courses.

To view the details of the bar graph, hover over the specific bar you want to view.

View Analytics Tables

To view analytics without hovering over graph columns, you can view all data in a table format. To switch to the table format, click the Analytics icon. The icon will switch from the left side to the right, indicating the current analytics view.
### Activity by Date

<table>
<thead>
<tr>
<th>Date</th>
<th>Page Views</th>
<th>Actions Taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-07-13</td>
<td>43</td>
<td>1</td>
</tr>
<tr>
<td>2017-07-11</td>
<td>18</td>
<td>0</td>
</tr>
<tr>
<td>2017-07-10</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>2017-06-16</td>
<td>51</td>
<td>2</td>
</tr>
<tr>
<td>2017-06-15</td>
<td>46</td>
<td>0</td>
</tr>
<tr>
<td>2017-06-14</td>
<td>49</td>
<td>0</td>
</tr>
</tbody>
</table>

Tables apply to every graph in its respective page, and each column defines the data within its respective graph. Graphical data is displayed by column.

<table>
<thead>
<tr>
<th>Date</th>
<th>Page Views</th>
<th>Actions Taken</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-05-26</td>
<td>645</td>
<td>0</td>
</tr>
<tr>
<td>2017-05-25</td>
<td>503</td>
<td>0</td>
</tr>
<tr>
<td>2017-05-24</td>
<td>513</td>
<td>0</td>
</tr>
<tr>
<td>2017-05-23</td>
<td>479</td>
<td>0</td>
</tr>
<tr>
<td>2017-05-22</td>
<td>472</td>
<td>0</td>
</tr>
<tr>
<td>2017-05-21</td>
<td>456</td>
<td>0</td>
</tr>
</tbody>
</table>

Each table is paginated to 30 entries per page; additional pages can be viewed by advancing to the next page.
How do I view statistics for an account?

The statistics page shows a snapshot view of activity in the current account. Statistics provide current information about your account but you can also view information over time. Statistics work in conjunction with Account Analytics, which can also be viewed from the Statistics page.

View a video about Analytics and Statistics.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Statistics

In Account Navigation, click the Statistics link.

View General Numbers

**General Numbers**

<table>
<thead>
<tr>
<th>Generated:</th>
<th>Jul 6 at 5:59pm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courses:</td>
<td>56</td>
</tr>
<tr>
<td>Teachers:</td>
<td>5</td>
</tr>
<tr>
<td>Students:</td>
<td>6</td>
</tr>
<tr>
<td>Users:</td>
<td>10</td>
</tr>
</tbody>
</table>

**File Storage**

| Uploaded:           | 1.88 GB from 1,463 files |
| Media:              | 477 MB from 36 files    |
In the Statistics page, you can view general information about your account.

- **Generated** shows when the data was last generated for your account. Data cannot be generated manually.
- **Courses** indicates the number of courses that are published in the account.
- **Teachers** indicates how many unique teachers have had activity within Canvas in the last 30 days. If one user is a teacher in five courses, the statistic will only count one teacher.
- **Students** indicates the same statistics as teachers, but relates to students.
- **Users** includes the total number of teachers, students, observers, designers, and TAs who have logged in during the last 30 days. This number does not include test students generated through Student View.
- **Uploaded File Storage** indicates the amount of files stored and the number of files in all courses for the entire account. Deleted files are not included. To learn about specific file quota details, view the Course Files Quota PDF. The file storage limit is calculated with the number of full-time enrollments (FTE) in your institution (default is 500 MB/FTE). To calculate the amount of file storage used in your account, convert the Uploaded file storage number shown to MB (e.g. 1.88 GB is 1880 MB). Then take the number of full-time enrollments and multiply the MB per enrollment (e.g. 3,000 FTE x 500 MB). If the converted number is lower than the multiplied number, your institution is within your file storage limit. If the number is higher, contact your Customer Success Manager for additional storage options. You can also change the quota for all course or specific courses.
- **Media File Storage** indicates the amount of media objects uploaded to active courses, such as video, audio, and music files. Media created in the Rich Content Editor are not part of media file storage.

General numbers show the current statistics in the course; to view how a statistic has evolved over time, click the over time link.
View Statistics Over Time

The statistics over time graphs show how specific data has evolved since your account was created. You can move your cursor over the data graph to view data for a specific date [1]. You can also download the data by clicking the Download CSV link [2].
View Course Statistics

Recently Started Courses

- **Beginning Biology**
  - started Jul 14 at 9:37pm

- **Biology 2020**
  - started Jul 14 at 9:19pm

- **Biology 103**
  - started Jul 10 at 6:45pm

  Common Core and State Standards

Recently Ended Courses

- **Common Core and State Standards**
  - concluded Jul 1 at 1pm

- **Common Core**
  - concluded Jun 17 at 11pm

You can view recently started courses [1] and recently ended courses [2] in your account. To view a course, click the name of the course.

View Users

Recently Logged-In Users

- **Emily Boone**
  - last logged in Jul 15 at 9:12am

- **Andy Admin**
  - last logged in Jul 14 at 8:28pm

- **Max Johnson**
  - last logged in Jul 14 at 4:11pm

- **Doug Roberts**
You can also view a list of users who have recently logged in to your account. To view details about a user, click the name of the user.

**View Account Analytics**

To view account analytics, click the View Analytics button.
How do I manage API access tokens as an admin?

You can manage API access tokens from your User Settings. Access tokens provide access to Canvas resources through the Canvas API. Access tokens can be generated automatically for third-party applications or created manually.

Using the Canvas API allows the access token holder to access the same Canvas resources that you can access. For example, third-party applications, including devices you have used to open the Canvas mobile apps, are authorized to access Canvas on your behalf. API calls require authorization and are made on behalf of an authorized user. For more information on using the Canvas API, view the Canvas API documentation.

Once you have a Canvas login you can create one of these access tokens to use for testing your development projects. This token must be included as a URL query parameter in any API calls made to Canvas.

Canvas tokens align with Canvas permissions. If your Canvas account is deleted, your tokens will be revoked. If you no longer have an administrative role in Canvas, your previously generated tokens will adjust to your new permissions.

Note:

- Users with masquerading privileges cannot remove the token on behalf of other users.
- Canvas admins cannot bulk delete API access tokens for users at their institution. For assistance with deleting access tokens for other users, contact your Customer Success Manager.
Open User Settings

In Global Navigation, click the **Account** link [1], then click the **Settings** link [2].
Third-party applications with access tokens and user-generated access tokens are listed in the Approved Integrations section [1].

For each access token, you can view the name [2], purpose [3], expiration date [4], and date of last use [5].

Note: Mobile access tokens never expire. To remove access for a mobile application, the access token must be deleted.
Add Access Token

Approved Integrations:

These are the third-party applications you have authorized to access the Canvas site on your behalf:

<table>
<thead>
<tr>
<th>App</th>
<th>Purpose</th>
<th>Dates</th>
<th>Details</th>
</tr>
</thead>
</table>
| Canvas Parent for Android  | HAFURY_U MAX | Expires: never  
Last Used: Jul 19 at 2:13pm | details |
| Canvas Parent for Android  | HAFURY_U MAX | Expires: never  
Last Used: Aug 6 at 10:13am | details |
| Canvas Teacher for Android | Pixel     | Expires: never  
Last Used: Jun 15 at 10:28am | details |
| Canvas for iOS             |           | Expires: never  
Last Used: Aug 20 at 1:20pm | details |
| Canvas Teacher for iOS     |           | Expires: never  
Last Used: May 17 at 1:46pm | details |

To add an access token, click the Add New Access Token button.
Add Token Details

**Generate an Access Token**

Access tokens are what allow third-party applications to access Canvas resources on your behalf. These tokens are normally created automatically for applications as needed, but if you're developing a new or limited project you can just generate the token from here.

- **Purpose:** Admin API
- **Expires:** Dec 31, 2018

Enter a description for your access token in the **Purpose** field [1]. You can also select an expiration date by clicking the **Calendar** icon [2]. To generate a token with no expiration, leave the Expires field empty.

To generate a new access token, click the **Generate Token** button [3].
## View Access Token

### Approved Integrations:

These are the third-party applications you have authorized to access the Canvas site on your behalf:

<table>
<thead>
<tr>
<th>App</th>
<th>Purpose</th>
<th>Dates</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canvas Parent for Android</td>
<td>HAFURY_UMAX</td>
<td>Expires: never, Last Used: Jul 19 at 2:13pm</td>
<td><a href="#">details</a></td>
</tr>
<tr>
<td>Canvas Parent for Android</td>
<td>HAFURY_UMAX</td>
<td>Expires: never, Last Used: Aug 6 at 10:13am</td>
<td><a href="#">details</a></td>
</tr>
<tr>
<td>Canvas Teacher for Android</td>
<td>Pixel</td>
<td>Expires: never, Last Used: Jun 15 at 10:28am</td>
<td><a href="#">details</a></td>
</tr>
<tr>
<td>Canvas for iOS</td>
<td></td>
<td>Expires: never, Last Used: Aug 20 at 1:20pm</td>
<td><a href="#">details</a></td>
</tr>
<tr>
<td>Canvas Teacher for iOS</td>
<td></td>
<td>Expires: never, Last Used: May 17 at 1:46pm</td>
<td><a href="#">details</a></td>
</tr>
</tbody>
</table>

**User-Generated** Admin API

Expires: Dec 31 at 12am, Last Used: --

[ details](#)

[1] View the token description. To view details for the token, click the details link.

[2] View the token description. To view details for the token, click the details link.
The access token details include a token that can be used to make API calls on your behalf [1].

To regenerate an access token, click the **Regenerate Token** button [2].
Delete Access Token

Approved Integrations:

These are the third-party applications you have authorized to access the Canvas site on your behalf:

<table>
<thead>
<tr>
<th>App</th>
<th>Purpose</th>
<th>Dates</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canvas Parent for Android</td>
<td>HAFURY_UMAX</td>
<td>Expires: never, Last Used: Jul 19 at 2:13pm</td>
<td>[Delete icon]</td>
</tr>
<tr>
<td>Canvas Parent for Android</td>
<td>HAFURY_UMAX</td>
<td>Expires: never, Last Used: Aug 6 at 10:13am</td>
<td>[Delete icon]</td>
</tr>
<tr>
<td>Canvas Teacher for Android</td>
<td>Pixel</td>
<td>Expires: never, Last Used: Jun 15 at 10:28am</td>
<td>[Delete icon]</td>
</tr>
<tr>
<td>Canvas for iOS</td>
<td></td>
<td>Expires: never, Last Used: Aug 20 at 1:20pm</td>
<td>[Delete icon]</td>
</tr>
</tbody>
</table>

To delete an access token, click the Delete icon.

Confirm Deletion


.documentation.beta.instructure.com says

Are you sure you want to delete this access key?

[Cancel] [OK]

To confirm the deletion, click the OK button.
How do I make API calls in an account with an access token?

If you have generated an API access token, you can use it to make API calls.

Canvas tokens align with Canvas permissions. If your Canvas account is deleted or if you are no longer an administrator, your tokens will also be revoked.

Option One: Make A Call Over HTTPS

GET /api/v1/courses.json

All API calls must also be made over HTTPS. The access token must be included as a URL query parameter in any API calls made to Canvas. For example, the endpoint to grab the user's list of courses is:

- GET /api/v1/courses.json

To retrieve Bob's list of course and if Bob's access token were "token_of_magical_power" then you would call

- GET /api/v1/courses.json?access_token=token_of_magical_powers

For a detailed example of using the API, check out the API basics documentation on github.

Option Two: Make A Call Using A Request Header

OAuth2 Token sent in header:

```
```

The other way to make an API call with an access token is to add it to the request header. If using curl (a command line program that can be used for running API requests) you would specify the access token like this.

- curl -H 'Authorization: Bearer <token>' 'http://<canvas>/api/v1/accounts/<account_id>/courses.json'

Notice that the access_token is not in the URL at all.

See the example on the API documentation site.
How do I install PowerShell 3.0 on a Windows machine?

Admins using Windows can use PowerShell to import data to Canvas and set up an automated data integration between Canvas and your SIS. With PowerShell, when changes are made in the SIS at the admin level, these changes will push to Canvas automatically.

PowerShell is typically installed natively on the Windows operating system.

Note: If you already have PowerShell installed with a version older than 3.0, remove the old version before installing PowerShell 3.0.

Download and Install Windows Management Framework 3.0

Find and download the most recent version of Windows Management Framework 3.0, which includes PowerShell version 3.

Note: Version 3 is more compatible with restful API call.

Download and Install PowerShell cmdlet

If you choose to use this example powershell script, you will need to download and install a PowerShell cmdlet called “Powershell Community Extensions” Pscx-3.1.0.msi from https://pscx.codeplex.com/releases
Execute PowerShell Scripts

2. Open a powershell command prompt (Start > Powershell ISE). You will need to run this as an admin (Right-click > Run as administrator)
3. Type in the command below and click the Enter key; then when the dialog box pops up click the Yes button.

   Set-ExecutionPolicy RemoteSigned
Attendance (Roll Call)
How do I add Roll Call Attendance badges to an account?

The Roll Call Attendance tool features badges that can be used to track particular behaviors or achievements among your students. You can create these badges at the account level and they will appear to instructors with courses within your account.

Instructors can also create their own badges within their courses. However, you can manage badges within a course at any time.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Attendance

In Account Navigation, click the Attendance link.

Manage Badges

Click the Manage badges tab.
Add Badge

<table>
<thead>
<tr>
<th>Generate report</th>
<th>Manage badges</th>
</tr>
</thead>
<tbody>
<tr>
<td>😔 OFF TASK</td>
<td>X DELETE</td>
</tr>
<tr>
<td>🔴 DISRUPTIVE</td>
<td>X DELETE</td>
</tr>
<tr>
<td>📡 PARTICIPATION</td>
<td>X DELETE</td>
</tr>
<tr>
<td>🧑🏼‍♂️ TEAM WORK</td>
<td>X DELETE</td>
</tr>
</tbody>
</table>

Click the Add Badge button.
Save Badge

Create a name for your badge [1], assign an icon [2], and choose a color to highlight the background when the badge is assigned [3]. Click the Save Badge button [4].
Manage Badges

You can edit any badge you create for your account.

To change the badge name, icon, or color, click the badge name [1].

To delete a badge, click the Delete button [2]. Deleting a badge will delete the badge for the entire course and all students.

Note: When managing or editing badges, any changes made will affect the entire account.
How do I run Roll Call Attendance reports for an account?

You can run reports to review attendance information for a subset of the courses and students in your account. This report is sent to your email, where it can be downloaded as a comma separated value (CSV) file.

The downloaded CSV report displays all content in a list. Reports always include the following data fields: Course ID, SIS Course ID, Course Code, Course Name, Teacher ID, SIS Teacher ID, Teacher Name, Student ID, SIS Student ID, Student Name, Class Date, Attendance, and Timestamp.

Roll Call Attendance Badges are included in account reports if they were created in the account and have been assigned to students. Additionally, the badges will also only be included if they were set within the time frame you specify in the report. To view badges for reports in a subaccount, you must request the report from the subaccount. For example, if an instructor has marked a student with a badge that was created in a course or in a subaccount, the badge will not appear in the report when exported from the account.

You can generate reports for the entire course, or you can generate reports based on specific students or courses. To locate a course or student ID, view the People page, click the name of a student, and both the course and student IDs will be in the browser URL (e.g. courses/XXXXXX/users/XXX).

**Note:** In order to gather all the needed information, a provisioning report will also be generated when an attendance report is requested. The provisioning report can be viewed in the Reports tab in Account Settings.
Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open Attendance

In Account Navigation, click the Attendance link.
Specify Report Data

In the Generate Report tab, you can specify criteria for your report. If you leave the fields blank, the report will be generated for the entire account.

You can choose a date range for the report [1]. You can also optionally filter by SIS course ID [2] or SIS student ID [3].

By default, the email field [4] will be populated with your email address to send the report. Confirm your email in the field or enter a new email address.

Run Report

Click the Run Report button.
View Notification

Thank you, your report should arrive in your inbox shortly.

A notification should appear if your request was successfully submitted.

View Email

You can download your report for the next 24 hours at https://s3.amazonaws.com/lit/tools/rollcall_beta/attendance-623a0293-bbd4-44e9-bc60-a342f9f74195.csv?AWSAccessKeyId=AKIAJIII6R5BH7DSNJA&Expires=1452616461&Signature=%2F4OVqngAKpzFGQKLQ32BwkDKYQ%3D

You will receive an email with the subject Roll Call Attendance Report. The email contains a link where you can access your attendance report for the next 24 hours. When you click the link, you can choose to view or download the report results.
Authentication
How do I configure self registration through Canvas authentication for an account?

By default, users can login directly to Canvas using Canvas authentication. However, all Canvas users must have a Canvas account before they can log in to Canvas.

Canvas authentication includes an option called self registration, which displays a registration banner on your account login page that allows users to create their own Canvas accounts. By default, Canvas authentication is enabled for all institutions, but self registration is disabled.

Note that Canvas authentication can be used without self registration. For instance, some institutions want to create user accounts with a student information system (SIS) and import SIS data into Canvas but allow users to log in using the default Canvas login page. Canvas authentication also supports Single Sign On (SSO) authentication, which allows you to customize your login information, and can be used in addition to third-party authentication providers.

Self Registration Accounts

You can allow self registration for all user roles (students, instructors, observers) or only observer roles.

- **Student Accounts**: Self registration is used with self enrollment. When users sign up as a student, a join code is required to access the course. Self enrollment creates the join code, which instructors can give to students to sign up in the course. Learn more about self enrollment options in your account.

- **Instructor Accounts**: Instructors can sign up for a Canvas account through self registration if your institution does not already create instructor accounts.

- **Observer Accounts**: Parents and other users who want to observe a student sign up through Canvas through the observer role.

Notes:

- Canvas authentication can only be deleted from the authentication page if another third party authentication provider has been enabled. If the only existing authentication provider is deleted, Canvas authentication will be restored as the default provider.

- Canvas authentication passwords require a minimum of eight characters.
Open Account

Click the Admin link [1], then click the name of the account [2].
Open Authentication

In Account Navigation, click the Authentication link.

Change Self Registration

Current Provider

Canvas

You can log in directly with this provider by going to /login/canvas

Self Registration

- Disabled
- All Account Types
- Observer Accounts Only

By default, Self Registration is disabled. To enable Self Registration, select the radio button for the registration type for your account.
To allow self registration for all users, select the **All Account Types** option [1]. To limit self registration to observers (including parents), select the **Observer Accounts Only** option [2].

**Save Self Registration**

Click the **Save** button.
How do I configure third-party authentication providers for a Canvas account?

Canvas supports authentication with a variety of third-party identity providers, which can be configured in the Canvas interface. Each provider requires the admin to set an attribute to be associated with the account, such as a user ID, email, or login. Currently supported integrations include Facebook, Github, LinkedIn, Twitter, Google Apps, Microsoft (Office 365), Clever, CAS, LDAP, OpenID, and SAML. Some providers require custom components for configuration. All providers support Single Sign On (SSO) authentication.

Third-party authentication providers can be used in addition to Canvas authentication.

User Credentials

Once a provider has been saved in Canvas, the provider's authentication login credentials must be added to each Canvas user's account through SIS CSV files or the Authentication Providers API. (Currently there is no support for adding user credentials through the Canvas interface.) Each authentication provider supports specifically recognized parameters; some providers may recognize additional parameters. Unrecognized parameters are not supported.

To get additional help about authentication systems, including Single Sign On (SSO) support, view the Authentication documents in the Canvas Community Admin Group.

Just In Time Provisioning

As part of the authentication process, admins can apply Just in Time Provisioning, which tells Canvas to automatically create a user's accounts if one does not already exist. Currently when a user logs in to Canvas using a third-party authentication system, Canvas searches users in the account looking for a matching user parameter for that service. If a matching parameter is not found, Canvas returns the user to the authentication provider portal with a message the user could not be found. When Just in Time Provisioning (JIT) is enabled, Canvas automatically creates the user using an ID that matches the username used with the authentication provider.

JIT provisioning must be configured via API for the specific authentication provider (see the Authentication Providers API). It does not need to be configured for individual users via API or SIS.

Federated Attributes

As a complement to JIT provisioning, all authentication providers support federated attributes. When users log into Canvas, more information beyond just ID is passed to Canvas, and that information is associated with their existing user accounts. More information can be found in the Authentication Providers API.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Authentication

In Account Navigation, click the **Authentication** link.

Choose Provider

In the Authentication drop-down menu, select an authentication service.
Save Provider Data

Google

To restrict to users from specific Google Apps domain, enter the domain here.

Google Apps Domain: school.edu

Login Attribute: sub

Just in Time Provisioning: [ ]

Enter the data required by the service [1]. Some providers require custom components for configuration.

To enable Just in Time Provisioning, click the Just in Time Provisioning checkbox [2].

Set Federated Attributes

Federated Attributes

Federated attributes are information sent from your authentication provider that can be used to automatically update corresponding information for users in Canvas each time they log in.

To use a federated attribute, select a Canvas provider attribute in the drop-down menu [1]. This is the attribute that you want to use in Canvas. Available attributes include admin roles, display name, email, given name, integration ID, locale, name, sis user ID, sortable name, surname, and time zone.

Click the Add Attribute button [2].
In the Provider Attribute drop-down menu, choose the attribute value that will match the selected Canvas attribute. Available values include email, family name, given name, locale, name, and sub (subject identifier—a user ID commonly used with Open ID Connect, Google, and Microsoft specifications).

Note that not all values will exactly match the Canvas attribute. For instance, if you set email as an attribute in Canvas, the provider attribute value options also include email, meaning that the email address from the provider will also be updated for the email address in Canvas. However, some Canvas attributes may not align with the available provider attribute values.

### Save Data

Click the **Save** button.
Manage Provider

Google
You can log in directly with this provider by going to /login/google
To restrict to users from specific Google Apps domain, enter the domain here.

Google Apps Domain

Login Attribute

Just in Time Provisioning

Federated Attributes
Federated attributes are information sent from your authentication provider that can be used to automatically update corresponding information for users in Canvas each time they log in.

Canvas Attribute | Provider Attribute
--- | ---
email | email

To change the position of your authentication providers, click the position menu [1] and choose the placement number for the new position. Positions affect the Discovery URL when an account has configured SSO Settings.

To delete the provider, click the Delete button [2].

Remove Authentication

Add an identity provider to this account:

Google

Remove Authentication
To remove all previously configured authentication providers, click the **Remove Authentication** button.

**Note:** The remove button does not affect SSO Settings or Canvas authentication.

**Confirm Removal**

Are you sure? Users may not be able to log in if this is removed.

[Cancel][OK]

Removing all authentication methods may affect your students' ability to log in to Canvas. To confirm, click the **OK** button.
How do I configure SSO settings for my authentication provider?

As part of Canvas authentication or third-party authentication, you can configure single sign-on (SSO) settings for your account. Changing the label also changes the login text on the password reset page.

SSO links inherit settings from the Theme Editor. Links can be updated in the Theme Editor Login section.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Authentication

In Account Navigation, click the Authentication link.
Configure SSO Settings

Authentication Settings
In order for a user to authenticate through an external identity provider (IdP), the user must have a login identifier that is both linked to this account and that matches the unique identifier returned by the IdP. To see a user’s current logins, see the “Login Information” section on the user’s profile page. (Found by searching for the user on the "Users" tab.) For example, here is your profile page: Admin, Andy

SSO Settings

Login Label
Login
The label used for unique login identifiers. Examples: Login, Username, Student ID, etc.

Forgot Password URL
Leave blank for default Canvas behavior

Discovery URL
If a discovery URL is set, Canvas will forward all users to that URL when they need to be authenticated. That page will need to then help the user figure out where they need to go to log in. If no discovery URL is configured, the first configuration will be used to attempt to authenticate the user.

In the SSO Settings section, enter details for the appropriate fields.

In the Login Label field [1], you can enter a label that displays in the login page and that students use to enter their unique identifier. If no label is set, the login field defaults to Email. You can enter labels such as username, student ID, etc.

In the Forgot Password URL field [2], you can enter the URL for your institution's forgot password page. Leave this field blank if you want users to view the default Canvas password reset page.

In the Discovery URL field [3], you can enter a URL for an authentication page, if any. If no page is set, users are sent to the first authentication provider in the authentication provider list.
Set Third-Party Unknown User URL

When using a third-party authentication provider, you can also enter a URL that redirects users if an authenticated user is not found in Canvas.

Save SSO Settings

Click the Save button.
Set Provider Positions

When you have more than one authentication provider in your account, Canvas authentication defaults to the first position and is the default configuration for the Discovery URL.

To change the position of your authentication providers, locate the provider and click the position menu [1]. Choose the placement number for the new position. Then click the Save button [2].

Note: Canvas authentication can only be deleted from the authentication page if another third party authentication provider has been enabled. If the only existing authentication provider is deleted, Canvas authentication will be restored as the default provider.
How do I view account settings in Commons?

As a Canvas admin, you can access account settings in Commons to manage public sharing and importing options for your account.

Notes:
- Canvas account admins are automatically made account admins in Commons.
- Non-admins (instructors, designers, etc) will not have access to Admin Settings.

Open Admin Settings

To access Commons Account Settings, click the Admin link.
View Account Settings

In the Account Settings tab, you can allow approved content settings, manage sharing settings, and configure default search filters.

You can also enable or disable standards and outcomes. By default, Standards & Outcomes settings are enabled.

You can edit your account settings at any time.
View Groups

In the Groups tab, you can create and manage groups with which you share resources.
View Consortiums

Consortiums

Create a new consortium

Name your new consortium

Share Consortium

State Resources

In the Consortiums tab, you can create and manage consortiums with which you share resources.
View Managed Resources

In the Managed Resources tab, you can search, view, and remove resources shared by your institution that are not private to the author/sharer. You can also edit resource metadata (details, content licensing, share option); however, you cannot edit or update resource content.
How do I edit my account settings in Commons?

As an admin, you can manage account settings. Settings are saved automatically as you make changes.

Open Admin Settings

In Commons Navigation, click the Admin link.

Open Account Settings

Click the Account Settings tab.
Edit Approved Content

### Account Settings

**Content**

1. **Allow Approved Content for Lorbeta Canvas Account**
2. **Select background color**
3. **Change image** - **Reset to default**

Size your image to 50 x 50 pixels. Accepted formats JPG, PNG and SVG.

4. **Prioritize approved content in search results**

Add users to manage approved content

5. **Max Eisenhardt ca...**
6. **David Tan dtan@ins...**

You can allow approved content for your Commons account. Approved content is indicated in search results by a customizable banner and image.

To allow approved content, enable the **Allow Approved Content** option [1].

To select a custom background color, click the **Select background color** button [2].

To upload a custom image, click the **Select image** link [3]. To reset the custom image back to the default (a white checkmark icon), click the **Reset to default** link [4].

To prioritize approved content in search results, click the **Prioritize approved content in search results** checkbox [5].

You can allow other users to manage approved content. Type the name of a user in the field and press Enter (PC) or Return (Mac) to give them permission to curate approved content [6].

**Note:** Custom images must be 50x50 pixels in size and the file format must be either JPEG, PNG, or SVG.
Edit Public Content

By default, users will be able to share and view public content.

To disable public sharing, deselect the Allow users to share to public account setting [1]. This will remove the Public option when finding a resource in Commons and the Share with public (All Canvas users) option when sharing a resource to Commons.

To prevent users in your account from viewing publicly shared content, deselect the Allow users to view publicly shared content setting [2]. This option will hide all publicly shared resources from your Commons account.

Notes:

- Authors of publicly shared resources will always be able to view their resource.
- If the Allow users to view publicly shared content option is disabled, admins will not be able to view public resources and discovering users will not be able to view updates to previously imported public resources.
Edit Default Search Filters

You can configure default search filters in Commons. Default search filters are automatically applied to all search results in Commons. However, users can modify filters for individual searches.

To turn on default search filters, enable the **Configure default search filters** option [1].

To only display approved content in search results, enable the **Only Account Approved Resources** option [2].

To filter content based on grade/level, click the checkbox next to the desired grade/level [3].

To filter content based on sharing and publicity settings, select an option from the list [4].
Edit Standards & Outcomes

By default, Standards & Outcomes settings are enabled.

To disable users from tagging federal or state standards to shared resources in Commons, click the Show Common Core Standards [1] or Show State Standards [2] button to turn off the option.
How do I manage shared resources for my account in Commons?

As an admin, you can search, view, edit, and remove your account's shared resources.

Open Admin Settings

In Commons Navigation, click the Admin link.

Open Managed Resources

Click the Managed Resources tab.
View Account Shared Resources

The Managed Resources page allows you to search for, view, and edit or remove resources shared by your institution that are not private to the author.

In the search field, you can search your account’s shared resources by entering keywords such as author or title [1]. You can also sort by Most Relevant, Latest, Most Favorited, or Most Downloaded [2].

To view and apply search filters, click the Filter button [3].

Apply Search Filters
You can filter search results when managing resources. Search filters have several options, including filtering by approved content [1], resource type [2], grade/level [3], and sharing settings [4].

**Remove Resource**

![Delete icon](image)

**QUIZ**
**Biology Intro: What do you know?**

All Grades
Doug Roberts

0 0

To remove a resource from Commons, click the **Delete** icon.

![Delete confirmation](image)

An embedded page at lor-beta.instructure.com says

Are you sure you want to delete?

2 Cancel 1 OK

You will be asked to confirm deletion of the resource. To confirm and delete the resource, click **Delete** [1]. You will be unable to recover the resource once it is removed from Commons. The author will no longer see the removed resource on their Shared page.
To cancel deletion, click **Cancel** [2].

**Note:** If you delete a shared resource in Canvas, other users will still be able to import that resource until you delete the resource in Commons.

**View Resource**

![Document: History Reading Assignment](image)

- **Title:** History Reading Assignment
- **Course:** 11 - Undergraduate
- **Author:** Doug Roberts

To view more details about a resource, click the resource tile.
Edit Resource Details

To edit resource details, click the Edit Resource button.

Note: Admins cannot edit or update resource content.
Remove from Commons

You can also remove a resource from the resource details page. To remove the resource, click the Remove from Commons button.
How do I manage Consortia in Commons?

As an admin, you can manage (create, edit, and delete) consortiums for your account. A consortium is a collective of several institutions, which is different than a Commons group.

You can also accept or decline invitations to consortiums and leave consortiums you have joined.

Open Admin Settings

In Commons Navigation, click the Admin link.

Open Consortia

Click the Consortia tab.

Create a new consortium

Click the Consortia tab.
Create Consortium

Consortiums

Create a new consortium

Name your new consortium

Type the name of the new consortium in the new consortium field. Then press the Return (Mac) or Enter (PC) key.

Edit Consortium Details

Edit Consortium

1. New Consortium

2. Allow my institution to contribute to consortium

Invite other Institutions

3. Search institutions to add
In the Edit Consortium page, you can change the consortium name [1], choose whether to allow your institution to contribute to the consortium [2], and invite other institutions [3]. To return to the Consortiums page, click the Back to All Consortiums link [4].

**Invite Institutions**

In the institution field [1], type the name or URL of the institution. Then select the institution from the search list [2].

**Manage Institutions**

Invited institutions will appear in the Contributor and Institution list [1] and will be marked as Pending [2] until the institution accepts the invitation to join the consortium. If the institution declines the invitation, the status will be Declined and can be dismissed.

To change the Contributor status of the institution, click the toggle [3]. To remove an institution from the consortium, click the Delete icon [4].
Edit Consortium

To edit a consortium, click the consortium's name on the Consortiums page.

Delete Consortium

To delete a consortium, click the Delete icon.

Accept or Decline Invitation

To accept an invitation, click the Join button [1]. To reject an invitation, click the Decline button [2].
Leave Consortium

To leave a joined consortium, click the **Leave** link.
How do I create and manage Groups in Commons?

As an admin, you can manage (create, edit, and delete) groups for your account. A group is a subset within an institution, which is different than a consortium.

As part of managing groups, you can add group managers. Group managers can change the group’s name, add or remove group members, make other members group managers, and edit or delete resources shared to the group.

Open Admin Settings

In Commons Navigation, click the Admin link.

Open Groups

Click the Groups tab.
Create Group

Type the name of the new group in the Create a new group field. Then press the Return (Mac) or Enter (PC) key.

Edit Group Details

In the Edit Group page, you can change the group name [1] and add users to the group [2]. To return to the Groups page, click the Back to All Groups link [3].
Add Group Members

In the **Search users to add** field [1], type the name or email address of the user and select the user from the search list [2].

**Note:** if you can’t find the user you’d like to add to the group, make sure they have accessed Commons in the past.

Manage Group Members

Users appear in the Group Member list [1] with the users’ name [2] and email [3].

To change the manager status of a user, select/use the toggle button [4]. To remove a user from the group, click the **Delete** icon [5].
Edit Group

In the Groups page, to edit a group, click the group's name.

Delete Group

To delete a group, click the Delete icon.
What is Canvas Data?

Canvas Data is a service from Canvas that provides admins with optimized access to their data for reporting and queries. Customers can combine their Canvas Data with data from other trusted institutions, as well as other key systems across campus such as a student information system (SIS).

Canvas Data Admins can download flat files or view files hosted in an Amazon Redshift data warehouse. The data will be an extracted and transformed version of a school’s Canvas activity and can be accessed using any open database connectivity (ODBC) analytics tool to generate custom data visualization and reports.

To enable Canvas Data, please contact your Customer Success Manager.

Canvas Data Exports

Canvas Data parses and aggregates the over 280 million rows of Canvas usage data generated daily and exports them as tab delimited (.txt) flat files. Files are also uploaded into Amazon Redshift for customers who want access to their own Redshift data warehouse.

Canvas Data flat files are available to all Canvas customers at no cost. Canvas Data has a paid service for Redshift available through the Professional Services team. Contact your Customer Success Manager for details.
Canvas Data Access

The Canvas Data Admin for an institution must be a Canvas admin. The Canvas Data Admin must understand data governance procedures and policies for the institution and also have enough technical proficiency to understand IP address ranges and database connection strings.

Admins can access Canvas Data information in the Canvas Data Portal. The portal allows admins to manage other Canvas Data users, settings, and flat files.

For institutions with a hosted account, admins can also manage access to Redshift and the IP Address Whitelist. Files are also available in the institution's Redshift database.
Canvas Data Files

Admins can use Canvas Data schemas and APIs to get insight on topics such as accreditation, improving course design, assessing student engagements and, enabling student intervention.

As part of the Canvas Data Portal, the Canvas Data schema includes documentation that explains all the table data that is exported from Canvas. Relevant files can be compared and used to answer questions such as:

- Which departments/courses/teachers are fully adopting the LMS tool?
- What makes a successful department/course/instructor?
- Which courses are being retaken?
- How can our institution improve student retention?
- Which learning objects are actually used by students?
- How much time do successful students spend on the course?
- When should an instructor intervene with a student?
- What courses fit a student’s learning style?
- How are students doing in the course (current and historical)?
- How can students plan to be more effective?
Canvas Data files can be used to create visual analysis using queries and reports in ODBC analytics tools. Common tools include Excel (using Amazon Redshift), Tableau, R, and SQL Workbench/J. Most other ODBC and Java database connectivity (JDBC) PostgreSQL clients should support the data, but pgAdmin is not supported.
Live Events

Canvas Data Live Events is a feature that allows certain activities, or events, to emit messages in real time from a defined list of Canvas actions. Live Events provides additional custom extensions to allow admins to receive more information from their Canvas account.

Admins can subscribe to Live Events in the Canvas Data Portal. The Canvas Data Admin will have to maintain an Amazon Web Services queue to receive Live Events data.

If Live Events is not available in your Canvas Data portal, please contact your Customer Success Manager.
How do I use the Canvas Data Portal for an account?

When your Customer Success Manager or Implementation Consultant enables Canvas Data for your account, Account Settings includes the Canvas Data Portal link. This link allows the Canvas Data Administrator to manage Canvas Data.

**Note:** Any Canvas admin in your account can view the Canvas Data Portal link, but unless they have been granted access by the Canvas Data Administrator, they cannot view the page content.

The Canvas Data Portal allows the Canvas Data Administrator to:

- view recent data exports
- view current users
- generate credentials for Redshift
- generate credentials for Canvas Data API access (used for downloading flat files)
- subscribe to Live Events

Open Canvas Data Portal

In Account Navigation, click the **Canvas Data Portal** link.
View Canvas Data Portal

The Canvas Data Portal allows you to manage Canvas Data. The portal includes two sections: the Credential Portal [1] and Documentation pages [2].

View Live Events

If Live Events has been enabled for your account, you can subscribe to events on the Live Events tab.

View Credential Portal

By default, the Canvas Data Portal opens to the Credential Portal, which includes all the credentials of your Canvas Data account.
View Recent Data Exports

<table>
<thead>
<tr>
<th>Finished Date</th>
<th>Finished</th>
<th>Number of Tables</th>
<th>Download Files</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar 10, 2017 2:33:28 AM</td>
<td>true</td>
<td>82</td>
<td>Download Files</td>
</tr>
<tr>
<td>Mar 9, 2017 2:15:01 AM</td>
<td>true</td>
<td>82</td>
<td>Download Files</td>
</tr>
<tr>
<td>Mar 8, 2017 2:12:13 AM</td>
<td>true</td>
<td>82</td>
<td>Download Files</td>
</tr>
<tr>
<td>Mar 7, 2017 2:18:33 AM</td>
<td>true</td>
<td>82</td>
<td>Download Files</td>
</tr>
<tr>
<td>Mar 6, 2017 3:23:30 AM</td>
<td>true</td>
<td>82</td>
<td>Download Files</td>
</tr>
</tbody>
</table>

Depending on your account access, the Recent Data Exports section displays downloadable files daily or monthly. The date of the file is when the data finished the export, not the actual date of the data. Most recent data is generally 24–36 hours older than the given date.

Canvas Data Historical Data

After Canvas Data has been enabled in your account a series of flat files display nightly for your account. The files contain tables representing all data beginning from the time Canvas Data was enabled in the account, with the exception of page view requests that contain an incremental download from the day before. To receive historical page view requests from before Canvas Data was enabled in the account, please contact your Implementation Consultant. The historical page view table data is uploaded separately and requests are typically processed every other month.

View Users

<table>
<thead>
<tr>
<th>Name</th>
<th>User Id</th>
<th>Manage Users</th>
<th>Grant Admin Permissions</th>
<th>Download Flat Files</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Teacher</td>
<td>6</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canvas Admin</td>
<td>41</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Andy Admin</td>
<td>163</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Manage Users section shows admins who have been given access to the Canvas Data Portal, along with their permissions. You cannot edit permissions for yourself.

Any admin who does not have access but who has tried to view the portal also appears in the list. You can choose to edit that user's settings and grant permission access at any time. Learn how to manage Canvas Data Admin users.

**View API Credentials**

If you would like to grant access to other users or third-party partners to automatically download data, you can generate API credentials and pass them to those users. To generate the credentials, click the Create Credentials button.

Once the credentials are generated, you will need to save them and transmit them securely to the users or third-party partners that will need them. The credentials can be regenerated at any time but the old credentials will be invalidated.

Learn more about the Canvas Data API in the Canvas Community.

**View Redshift Server Info**

If your account allows you to access Redshift, your account will include access to a hosted online Redshift Amazon data warehouse. This data warehouse environment is accessible via any ODBC compliant analytics tool such as R, Excel, Tableau. To generate credentials for this environment, click the Create Credentials button.

Once the credentials are generated, you will need to save them. The credentials can be regenerated at any time but the old credentials will be invalidated.
View Documentation

To view Canvas Data documentation, click the Documentation tab menu.

The Schema Docs explain all the table data that is exported from Canvas.

The API Docs show all the API calls you can use for Canvas Data.
How do I manage Canvas Data admin users?

In the Canvas Data Portal, the Current Users section shows admins who have been given access to the Canvas Data Portal, along with their permissions. You can edit permissions for existing admins, add new admins, and delete admins.

Open Canvas Data Portal

In Account Navigation, click the Canvas Data Portal link.

View Users

<table>
<thead>
<tr>
<th>Name</th>
<th>User Id</th>
<th>Manage Users</th>
<th>Grant Admin Permissions</th>
<th>Download Flat Files</th>
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<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Andy Admin</td>
<td>163</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
In the Credentials Portal, you can view the users who has been given access to the Canvas Data Portal.

Any admin who does not have access but who has tried to view the portal also appears in the list.

User information includes the admin's name [1] and admin's user ID [2].

View Permissions

<table>
<thead>
<tr>
<th>Name</th>
<th>User Id</th>
<th>Manage Users</th>
<th>Grant Admin Permissions</th>
<th>Download Flat Files</th>
</tr>
</thead>
<tbody>
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<td>No</td>
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<td>No</td>
</tr>
<tr>
<td>Andy Admin</td>
<td>163</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

User information also displays permissions based on your institution's Canvas Data subscription.

In permissions, the no label means that the user cannot perform the listed permission. A yes label means that the user has access to perform the permission.

An account may include up to five available permissions:

- **Manage Users**—can add other Canvas Data users for the account
- **Grant Admin Permissions**—can allow Canvas Data users to add other Canvas Data users
- **Connect to Redshift**—can generate credentials to connect to Redshift (hosted accounts only)
- **Manage IP Address Whitelist**—can manage the IP whitelist (hosted accounts only)
- **Flat File Download**—can download flat files from Canvas Data
Manage Users

To edit a user, click the **Edit** button [1]. To delete a user, click the **Delete** button [2].

**Note:** You cannot edit or delete information for your own account.

Add User

To add a new admin, scroll down the page to the **Add New User** section.
Enter the Canvas ID [1] and the Full Name [2] of the admin. Select the checkbox(es) for the permission(s) you want to enable for the user [3].

Click the Create User button [4].
How do I subscribe to Live Events in the Canvas Data Portal?

As an admin, you can subscribe to Live Events and receive a real-time set of events from your Canvas Account. You can choose which events in Canvas you want to subscribe to. You will need to maintain an Amazon Web Services queue to receive Live Events data.

Additionally, Canvas has custom extensions available for many objects and types.

Note:

- If you do not have access to the Canvas Data Portal in your account, please contact your Customer Success Manager.
- To receive Live Events data, you will need to subscribe to Amazon Web Services in order to maintain a queue.

Open Canvas Data Portal

In Account Navigation, click the Canvas Data Portal link.
Open Live Events

Canvas Data Credential Portal

Click the **Live Events** tab.

**Add Live Events Subscription**

Click the **Add Live Events Subscription** button.

**Add SQS URL**

In the SQS URL field, enter the URL of your queue.
Select Live Events

In the Live Events section, all Live Events are selected by default [1]. If you do not want to subscribe to a specific event, deselect the checkbox for the event [2]. When you have finalized your selections, click the Create button [3].

View Live Events Subscriptions

View your active Live Events subscriptions.

To edit a Live Events subscription, click the Edit icon.
How do I use Canvas Data files?

Canvas Data files should be used to create queried reports in ODBC analytics tools. Common tools include Tableau, SQL Workbench/J, Excel, and R. Analytics tools can also access the Redshift database.

As part of the Canvas Data Portal, the Canvas Data Schema includes documentation that explains all the table data that is exported from Canvas. This documentation shows all the available files and the data in each file.

For full Canvas Data use, data files should live in a database. Once you have downloaded your institution's flat files, table headers must be added to the files before analysis can be run through your preferred database.

If your institution does not have its own data warehouse, Amazon Redshift is available as a premium option to host and run analytical data. Please contact your Customer Success Manager for more information.

*When using an IP Address Whitelist, software files should be set up from a computer that can access the whitelisted IP address.*

For help with using Canvas Data in various software platforms and sample queries, please view the Canvas Data Group in the Canvas Community.
Tableau is a per-user license software platform that helps people see and understand their data. For help with files in Tableau, please view the Tableau support page.

Canvas Data in Tableau can be viewed through Amazon Redshift and is the easiest, recommended method for accessing and analyzing data. In Tableau, select the Connect to Data link and select Amazon Redshift. To connect to the database, enter your Redshift credentials as set up in the Canvas Admin Portal.
SQL Workbench/J

SQL Workbench/J is a free cross-platform SQL query tool that operates on Java. For more information about SQL Workbench/J, please see the Amazon SQL Workbench/J documentation.

Canvas Data in SQL Workbench/J can be viewed through Amazon Redshift. To connect to the database, enter your Redshift credentials as set up in the Canvas Admin Portal.

image source
Excel is a data analysis tool that is part of Microsoft Office. Windows users can download the Windows Redshift ODBC Driver, and Mac OS X users can download the Mac Redshift ODBC Driver.

Canvas Data in Excel can be viewed through Amazon Redshift. Open Excel, select the Excel Data Connection Wizard, and locate the ODBC driver. To connect to the database, enter your Redshift credentials as set up in the Canvas Admin Portal.

```r
require(redshift)
redshift.connect(
  jdbc:postgresql://xxx-redshift.beta.inhosteddata.com:5439/canvas",
  "<password>")
cords <- dbGetQuery(c, "select id, name from course_dim")
```
R is a free software environment for statistical computing and graphics. It runs on a wide variety of platforms. For help with files in R, please view the R support page.

Canvas Data in R can be viewed through Amazon Redshift. To connect to the database, enter your Redshift credentials as set up in the Canvas Admin Portal.

**Other ODBC Tools**

Most other ODBC and Java database connectivity (JDBC) PostgreSQL clients should be supported by Canvas Data. However, please note that pgAdmin is not supported.
How do I obtain an API access token in the Canvas Data Portal?

The Canvas Data API allows you to get information about or download Canvas Data files.

Any Canvas Data admin can generate API credentials, but the credentials are shared between all admin users in that account. If you would like to grant access to other users or third-party partners to download files via the API, you can generate credentials and securely pass them to those users. However, if you need to revoke access for a user, you will need to regenerate the credentials and securely distribute the credentials again.

Open Canvas Data Portal

In Account Navigation, click the Canvas Data Portal link.

Create Credentials

API Credentials

Create Credentials
Click the Create Credentials button.

Copy Credentials

API credentials successfully created

API Details
Make sure to save these credentials, once you navigate from this page, you will not be able to retrieve them again!
For more details on the API, see the Docs
API Key:
API Secret:

Copy the API Key and API Secret. If you return to the Credentials Portal, you will be able to see the API Key but not the API Secret.

Create New Credentials

API Credentials
You already have generated API credentials, your API key is
If you need to reset your credentials, click below, but be aware the old credentials will be invalidated
Create Credentials

You can create new credentials by clicking the Create Credentials button. However, generating new credentials will invalidate the old credentials for all users who have access to them.
Courses and Sections
How do I use the Courses page in an account?

You can view courses in your account in the Courses page. You can view and filter courses by term and teacher and search for courses individually. You can also sort search result columns in ascending or descending order.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
View Courses in Sub-Accounts

If you have organized courses in your account by sub-accounts, click the Sub-Accounts link to locate and open the sub-account, then click the sub-account's Courses link.
View Courses Page

When you open an account, the account defaults to the Courses page.

The Courses page displays all courses in the account. The page is designed with global settings at the top of the page [1] followed by the generated course data [2].

All fields are responsive to the width of the browser, which can be adjusted as needed to display course data.
Filter Terms

Global settings include searching and filtering by course data. Filters and search fields are updated dynamically.

Courses for all terms are displayed by default. To filter courses by term, select the Terms menu [1]. Terms are grouped by active, future, and past terms. The Default term is included in the active terms list. Depending on the number of terms in an account, the Terms menu may display a loading message until all terms are visible.

When you select the Terms menu, the full name of a term is displayed in the list [2]. Once selected, the term name is truncated in the menu [3]. To view the full name of the term, click the Terms menu again.
Sort and Search Courses

The Courses page defaults to searching by courses. To search for a specific course, type the name of the course in the search field [1].

To search courses by teacher (instructor), click the Sort by menu [2] and select the Teacher option. The search field text will update to show courses are being searched by teacher. You can search by the instructor’s name or user ID (SIS ID and login ID are not supported).

If you want to hide courses with no student enrollments, click the Hide courses without students checkbox [3].

View Blueprint Courses

If you only want to filter by blueprint courses, click the Show only blueprint courses checkbox [1].

Blueprint Courses include the Blueprint icon [2].

<table>
<thead>
<tr>
<th>Published</th>
<th>Course</th>
<th>SIS ID</th>
<th>Term</th>
<th>Teacher</th>
<th>Sub-Account</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Geography 101</td>
<td></td>
<td>Default Term</td>
<td>Doug Roberts</td>
<td>Documentation Canvas</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Zoology</td>
<td></td>
<td>Default Term</td>
<td>James Williams</td>
<td>College of Sciences</td>
<td>0</td>
</tr>
</tbody>
</table>

Canvas Admin Guide Updated 2019-08-05
Add Course

To **add a course to the account**, click the **Add Course** button.

**View Courses**

<table>
<thead>
<tr>
<th>Published</th>
<th>Course</th>
<th>SIS ID ▼</th>
<th>Term</th>
<th>Teacher</th>
<th>Sub-Account</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>History 101</td>
<td>Hist101</td>
<td>Default</td>
<td>Ranjit Chauhan</td>
<td>Documentation Canvas</td>
<td>6</td>
</tr>
<tr>
<td>✔</td>
<td>American</td>
<td>Hist101</td>
<td>Default</td>
<td>Jessica Doe</td>
<td>Courses</td>
<td>0</td>
</tr>
<tr>
<td>✔</td>
<td>History 101</td>
<td>Hist101</td>
<td>Term</td>
<td>Erin Hallmark</td>
<td>Old Demo</td>
<td>0</td>
</tr>
<tr>
<td>✔</td>
<td>US History</td>
<td>Hist101</td>
<td>Term</td>
<td>Doug Roberts</td>
<td>History</td>
<td>0</td>
</tr>
</tbody>
</table>

The Courses page paginates filter and search results in sets of 15 courses and are ordered by SIS ID. Each paginated page displays in a table format but columns are responsive according to the widest column for that page.

Results display the name of the course [1], SIS ID (if applicable) [2], term [3], teacher [4], subaccount [5], and number of active students [6].

Except for the Student column, each column heading can be sorted in ascending or descending order (alphabetically or numerically).
Published courses display a check mark next to the course name [1].

If a course includes more than two teachers, the Teacher column displays a **Show More** link [2]. This link can be clicked to expand the full list of teachers.

### Manage Course
To open a course, click the name of the course [1]. To view user details for a teacher in the course, click the name of the teacher [2].

For quick access to course data, you can manually add a user to the course [3], view course statistics [4], and view course settings [5].
How do I add a course in an account as an admin?

You can manually add courses in your account in the Courses page. Watch a [video about courses](#).

**Notes:**

- Courses added manually in Canvas are not linked back to SIS data and are not affected by SIS imports.
- To link a manually created course with an SIS ID, [edit the details for a course section](#).
- Courses can also be added through SIS Imports. Courses added manually in Canvas are not linked back to any SIS data (though they could be by associating an SIS ID) and are not affected by SIS imports.

Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the Courses link.

Note: When you open an account, the account defaults to the Courses page.

Add Course

Click the Add Course button.
Add Course Details

In the **Course Name** field [1], create a name for the course.

In the **Reference Code** field [2], create a reference code for the course. The reference code is also known as the short name or course code and is displayed at the top of the Course Navigation Menu and as part of a student's course card in the dashboard. The code is also referenced in the account Courses page.

In the **Subaccount** menu [3], select a sub-account for the course. Menu options are based on the sub-accounts already created in your account.

In the **Enrollment Term** menu [4], select the term you want to associate with the course. Menu options are based on the terms already created in your account.
Add Course

Click the Add Course button.
How do I delete a course in an account as an admin?

Once you delete a course, the course will be completely removed from your institution’s account and will not be viewable by you, prior students, or the account administrator. We do not recommend deleting courses (even concluded ones), especially if the course contains content and student data, because you may need to access that information at a later date.

If you only want to remove the course from Courses & Groups in the Global Navigation Bar, you can change the course end date, or conclude the course instead.

Notes:

- Before you delete a course, make sure you have a record of your Course ID number in case you need to restore it. You can locate your Course ID number at the end of your course URL (i.e. canvas.instructure.com/courses/XXXXXX).
- Courses are not deleted from an account unless done so by you or another user at your institution.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the Courses link.

Note: When you open an account, the account defaults to the Courses page.

Find Course

Use the filter and search options to find the course in the account.

Open Settings

In the search results, click the Settings link for the course.
Permanently Delete Course

Click the **Delete this Course** link.
Confirm Course Deletion

Are you sure you want to delete this course? Once it is deleted, students and teachers will no longer have access to it. If you just want to remove it from the course drop-down menu, you should conclude the course instead. If you do not have permission to conclude the course, you can change the course end date, or ask your administrator to conclude the course.

Click the Delete Course button.
How do I add a section to a course as an admin?

You can add a section to your course by editing your course Settings in Canvas. Sections help subdivide students within a course and offer section-specific options such as varied due dates for assignments, discussions, and quizzes. Sections also display for each student within the course People page and the Gradebook.

Sections can also be created for students who need extra time in a course, such as if a student has an incomplete grade.

Note: Sections may be added by your institution's student information system (SIS). Some course sections may have already been created for you.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the Courses link.

Note: When you open an account, the account defaults to the Courses page.

Find Course

Use the filter and search options to find the course in the account.

Open Settings

In the search results, click the Settings link for the course.
Open Sections

Click the **Sections** tab.

Add Section

In the section field [1], type the name of the new section. Click the **Add Section** button [2].

Add SIS ID

If you need to add or edit an SIS ID, click the name of the section.
Click the **Edit Section** button.

In the SIS ID field [1], enter or edit the SIS ID. Click the **Update Section** button [2].

Changing section dates may override course and term availability settings and placement in the Courses page and Dashboard. Please confirm term and course dates before modifying section dates.

- **Starts:**
- **Ends:**

- **Students can only participate in the course between these dates**
- **When selected, the course section is in a read-only state outside these dates.**

In the SIS ID field [1], enter or edit the SIS ID. Click the **Update Section** button [2].
View Section

Course Sections

Biology 101  (19 Users)
Biology 101 - MWF  (3 Users)
Biology 101 - TTH  (13 Users)

View the section in your course.

You can also choose to change section start and end dates if needed.

You can add additional sections if necessary. Multiple sections are ordered alphabetically.

Note: Sections with SIS IDs also display the section's SIS ID in the Course Sections page.
How do I change the start and end dates for a course section as an admin?

By default, sections inherit course dates set for your entire institution. If a course does not include specific dates, the section dates default to term dates. However, as an instructor, you may need to change the start and end dates for a course section. Dates can be shorter than or overlap the course or term dates.

Adding section dates may also affect the Courses page and the placement of the section's course in the Past, Current, or Future Enrollments list for students.

**Limit User Participation Dates**

You can set whether or not students can only participate in the section during the specified section dates using the Student Participation checkbox. Participation means that students can submit assignments, post discussions, upload files, or take part in any other action-based task for the course section. If you limit students to only be able to participate during the section dates, they can accept the course section invitation, access the course section, and look at content, but they cannot fully participate until the first day of the course for the section. When the course section is concluded, the course section is placed in a read-only state.

**Section Override Dates**

Section override dates are only created if the Student Participation checkbox is selected as part of creating section start and end dates (both dates are required). Students can participate in the course section before and after the start and end date, and participation will always be determined by the course dates. If a course does not include override dates, dates are determined by term dates.

**Dashboard Considerations**

The Student Participation sections checkbox may also affect courses that have been marked as a favorite and display in the Dashboard. If a section includes an override date and the Student Participation checkbox is selected, students cannot participate in the course after the section end date, and the course will be removed from the Dashboard.

Moreover, if the Student Participation checkbox is not selected, the course will still display in the Dashboard as a favorite course after the section end date since the course section still allows participation as an active course. The course will not be removed until the course section is concluded via course/term dates. However, if the Student Participation checkbox is not selected for the section, the section dates determine the placement of the course section in the Past, Current, or Future Enrollments list regardless of the course/term dates.

**Note:** Section start and end dates may be added by your institution's student information system (SIS).
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the Courses link.

Note: When you open an account, the account defaults to the Courses page.

Find Course

Use the filter and search options to find the course in the account.

Open Settings
In the search results, click the **Settings** link for the course.

**Open Section**

<table>
<thead>
<tr>
<th>Course Details</th>
<th>Sections</th>
<th>Navigation</th>
<th>Apps</th>
<th>Feature Options</th>
</tr>
</thead>
</table>

**Course Sections**

- Biology 101  (19 Users)
- **Biology 101 - MWF**  (3 Users)
- Biology 101 - TTH  (13 Users)

Click the name of the section.

**Edit Section**

- [Edit Section](#)
- [Cross-List this Section](#)
- [Back to Course Settings](#)

Click the **Edit Section** button.
Set Start Date

Click the Starts calendar icon [1]. Select a new start date for the section [2].
Set End Date

Click the Ends calendar icon [1]. Select a new end date for the section [2].

Limit Student Participation

If you do not want to let students participate in the course section outside of the section dates, select the Students can only participate in the course between these dates checkbox [1]. Selecting this checkbox creates a section override and overrides the course dates. Students can only participate in the course section between the section dates, and the course section will be in a read-only state outside the course section dates.

This checkbox only affects student and observer roles; all other roles default to term access dates.

Notes:

- Section override dates are only created if the Student Participation checkbox is selected.
• If the Student Participation checkbox is not selected, students can participate in the course section before and after the start and end date, and participation will always be determined by the course dates. If a course does not include override dates, dates are determined by term dates.
• When the Student Participation checkbox is not selected, the section dates determine the placement of the course in the Past, Current, or Future Enrollments list for students.

**Update Section**

[Image of buttons: Cancel, Update Section]

Click the **Update Section** button.
How do I use cross-listing in an account?

Cross-listing allows you to create a section in one account or sub-account and then move it to a different course within the same account or sub-account, or to a course on a different account or sub-account.

Cross-listing is usually an admin permission only. However, some institutions allow their instructors to cross-list their own sections.

Courses versus Sections

Courses are the virtual classroom where all the content resides, the place where students can learn and interact with the instructor and each other. Sections are a group of students that have been organized for administrative purposes. Students are enrolled in sections and sections are listed in courses. It is possible to place more than one section in course, but not possible to put sections within sections.

Cross-Listing Sections

<table>
<thead>
<tr>
<th>Course Details</th>
<th>Sections</th>
<th>Navigation</th>
<th>Apps</th>
<th>Feature Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Sections</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Biology 101 (19 Users)</td>
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<tr>
<td>Biology 101 - TTH (13 Users)</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Cross-listing 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. Section names do not change when they are cross-listed; the section is just moved to another course. Sections can only be in
one course at a time. Once a section is cross-listed, you can re-cross-list the section into another course if necessary. Learn how to [cross-list a section](#).

### Course Status

Coursework is retained with the course, not with the section enrollments. Therefore, **cross-listing should only be done in unpublished courses**. If there are student submissions in the course when the section is cross-listed, the submissions and grades will not transfer to the new section.

If you need to restore the enrollments, you can [de-cross-list a section](#) back to the course. If you need to retain student grades in the original course, you should export the Gradebook and import it into the original course before de-cross-listing the section.

### Instructor Enrollments

Instructors are included as a part of the cross-listed section. Cross-listing removes the instructor’s access to the original course and moves the instructor into the new course with the other users in the section. If you want an instructor to have access to the original course, you must add the instructor’s enrollment to a separate section in the original course.

If you allow instructors to cross-list their own sections, they can only de-cross-list a section back to the original course if they still have an enrollment in the original course. Otherwise they will have to contact you for assistance.

### Cross-Listing Examples

In K12 institutions, cross-listing can be used for instructors who are teaching the same subject in more than one class. For instance, an instructor is teaching Algebra during 1st, 3rd, and 7th period. These periods can be set up in Canvas as three separate courses, and students are enrolled in the course according to which period they are taking. Rather than enter and
manage course content three different times, two of the courses can have a section (or multiple sections) cross-listed into the third course before the course is published. So if the sections created in the courses for the 3rd and 7th periods were cross-listed into the course created for 1st period, the instructor only has to update the first course, which now includes all three periods as individual sections.

In higher education, the same concept applies. Many times one course taught by one teacher is shown for course credit across multiple departments. If an English 1010 course is spread across four different departments with different names, institutions can create separate courses for each department's enrollments (e.g., English, Business, Psychology, and Education), then open those courses and cross-list their sections into one master course.

Managing one course with multiple sections provides flexibility for instructors all while managing content in one location. Instructors can use sections to create differentiated assignments and section-specific due dates, create self sign-up groups where students must all be in the same section, and specify that enrollments can only interact with other users in their section.
How do I cross-list a section in a course as an admin?

Cross-listing 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 cross-listed; the section is just moved to another course.

Cross-listing should be done while courses are unpublished. Coursework is retained with the course, not with the section enrollments, so if a published course is cross-listed, all cross-listed enrollments will lose any associated assignment submissions and grades.

To cross-list a course, you must know the name of the course or the course ID into which you are cross-listing. However, using a course ID is a better way to confirm you are cross-listing a section into the correct course. You can find the course ID by opening the course and viewing the number at the end of the browser URL (e.g. account.instructure.com/courses/XXXXXX).

Sections can only be in one course at a time. Once a section is cross-listed, you can re-cross-list the section into another course if necessary. You can also de-cross a section.

This lesson shows how to manually cross-list a section, though cross-listing can also be done through SIS imports. For more information on cross-listing, view the cross-listing video.

Note: Before you can cross-list a section, the course must contain at least one enrollment.
Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the **Courses** link.

**Note:** When you open an account, the account defaults to the Courses page.

### Find Course

Use the filter and search options to find the course from which you are cross-listing in the account.

### Open Settings

<table>
<thead>
<tr>
<th>Intro to Biology</th>
<th>A00101</th>
<th>Default Term</th>
<th>Biology</th>
<th>0</th>
<th>+</th>
<th>Settings</th>
</tr>
</thead>
</table>
In the search results, click the **Settings** link for the course from which you are cross-listing.

**Open Sections**

Click the **Sections** tab.

**Open Section**

**Course Sections**

- **Biology 101** (19 Users)
- **Biology 101 - MWF** (3 Users)
- **Biology 101 - TTH** (13 Users)

Click the title of the section you want to cross-list.

**Cross-List Section**

- **Edit Section**
- **Cross-List this Section**
- **Back to Course Settings**

Click the **Cross-List this Section** button.
Search for Course

Cross-List this Section

Cross-List Section

Cross-listing allows you to create a section in one account and then move it to a course on a different account. To cross-list this course, you'll need to find the course you want to move it to, either using the search tool or by entering the course's ID.

Search for Course: 1

Or Enter the Course's ID: 2

Selected Course:

In the Search for Course field [1], enter the name of the course into which you are cross-listing. Or, in the Course ID field [2], enter the ID number for the course.

Cross-List this Section

Confirm you have selected the correct course [1]. Click the Cross-List This Section button [2].
Confirm Cross-Listing

The cross-listed section now appears in the new course. The breadcrumbs show the new course code.

Re-Cross-List Section

Sections can only be in one course at a time. If you need to cross-list the section into a different course, click the Re-Cross-List this Section button.
How do I de-cross-list a section in a course as an admin?

If you cross-listed a section from a course, you may be able to cross-list the same section back into the original course. This process is called de-cross-listing and returns all student enrollments back to the original course section.

Once you de-cross-list enrollments, all grades and student submissions are removed from the course (since the course can no longer associate the information with any course enrollments). If you need to retain student grades and put them in the original course, you should export the Gradebook and import it into the original course before de-cross-listing the section.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the **Courses** link.

**Note:** When you open an account, the account defaults to the Courses page.

Find Course

Use the filter and search options to find the course in the account.

Open Settings
In the search results, click the **Settings** link for the course.

**Open Sections**

<table>
<thead>
<tr>
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</table>

Click the **Sections** tab.

**Open Section**

<table>
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**Course Sections**

- **Biology 101** (19 Users)
- **Biology 101 - MWF** (3 Users)
- **Biology 101 - TTH** (13 Users)

Click the title of the section you want to de-cross-list.
De-Cross-List This Section

Click the **De-Cross-List this Section** button.

Click the **De-Cross-List this Section** button. The section will be moved back to its original course.

**Note:** If you de-cross-list a section that includes student grades, Canvas will include a message that all grades will no longer be visible. If you need to retain student grades and put them in the original course, you should export the Gradebook and import it into the original course before de-cross-listing the section.
How do I conclude a course at the end of a term as an admin?

When a course is completed and you want to provide read-only access to the course, you may be able to conclude the course manually in Canvas. However, if your institution uses software that automatically concludes enrollments, you do not have to manually end your course since the end date of the course will automatically conclude the course on your behalf.

When courses are manually concluded, all enrollments are removed from the course and placed in the prior enrollments page. All users in the course will have read-only access. This change applies to all enrollments, including course instructors. Instructor-based roles will no longer have the same access in the course and will result in loss of course functionality and user information, such as viewing SIS data. If full functionality is still required for instructors but you want to conclude the course for students, you can change the end date of the course. Please note that instructors can also change the course date for their courses.

Once a course is concluded, if you do not want students to be able to view the course at all, you can restrict students from viewing prior courses.

Notes:

- Manually concluding a course is a course permission. If the Conclude this Course button does not appear in Course Settings, this setting has been restricted for your course. If you are an instructor, contact your admin for assistance.
- Manually concluding, or hard concluding, a course results in loss of user access and functionality for all user roles. To preserve user access and information, and course functionality for instructors, consider soft concluding a course using term dates or course end dates.
- You can unconclude courses if necessary.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the Courses link.

Note: When you open an account, the account defaults to the Courses page.

Find Course

Use the filter and search options to find the course in the account.

Open Settings
In the search results, click the **Settings** link for the course.

**Conclude This Course**

- Student View
- Course Statistics
- Course Calendar
- Conclude this Course
- Delete this Course
- Copy this Course
- Import Course Content
- Export Course Content
- Reset Course Content
- Validate Links in Content

To conclude your course, click the **Conclude this Course** button.
Conclude Course

Confirm Conclude Course

Warning: Concluding the course will archive all course content and prevent you from modifying grades.

If you would like to retain the ability to change grades while limiting student access to the course, please utilize the course dates settings. You can learn about course date settings in our guides here.

Click the Conclude Course button.

View Confirmation

Course successfully concluded

Verify that the course has been concluded.
How do I unconclude a course in an account?

You can unconclude a concluded course. For example, if an instructor has the appropriate permissions to conclude a course before the end of the term, Canvas sets an immediate end date for the course and puts the course in an archived state for both students and instructors. However, as an admin, you can unconclude courses at any time if an instructor needs to have a course restored to the account.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the Courses link.

Note: When you open an account, the account defaults to the Courses page.

Find Course

Use the filter and search options to find the course in the account.

Open Settings

Intro to Biology  A00101  Default Term  Biology  0  +  

Canvas Admin Guide Updated 2019-08-05
In the search results, click the Settings link for the course.

**Unconclude Course**

- Share to Commons
- Student View
- Course Statistics
- Course Calendar

[Un-Conclude Course]

Click the **Unconclude Course** button.

**View Confirmation**

Course un-concluded

Verify that the course has been unconcluded.
How do I enable a course as a blueprint course as an admin?

As an admin, you can enable any course in your institution as a blueprint course in Course Settings. A blueprint course allows you to create content and learning objects, lock specific settings or content items, and push updates to all associated courses through course syncing.

Any course can be set as a blueprint course as long as it is not associated with another blueprint course or contain student enrollments. Associated courses must reside in the same or a lower subaccount than where the blueprint course resides.

The Course Settings page sets the specific definition for how locked objects should be treated for the entire course. Once a definition is set, objects can be locked individually within their appropriate Canvas Index pages.

Locked objects can be defined generally or specifically by type. By default, each object type contains no locked attributes. Attributes that can be locked include content, points, due dates, and availability dates and apply within assignments, discussions, pages, files, and quizzes.

**General Locked Objects**

By default, the course is defined for General Locked Objects, meaning that any objects locked in the blueprint course are subject to general attributes that cannot be edited in associated courses. For instance, when Content is selected as a locked object attribute, instructors in associated courses are not able to edit any content for any locked objects. The option to lock content is selected by default, though it can be deselected as a lock option.

**Locked Objects by Type**

Blueprint courses can also be defined for Locked Objects by Type, meaning that any objects locked in the course are subject to specific settings set by type that cannot be edited in associated courses. Blueprint courses support and sync five object types: assignments, discussions, pages, files, and quizzes.

**Object Definition Changes**

You may change object definitions and attributes for locked objects in Course Settings at any time. However, unlocking any previously locked attribute retroactively applies to all related locked objects in the associated course. If a previously locked attribute is enabled, or unlocked, in the blueprint course, any locked content attributes in the associated course that vary from locked content attributes in the blueprint course will trigger an unsynced change and override the content in the associated course. Please ensure definitions and attributes are specified before making associated courses available to instructors.

**Notes:**

- Blueprint courses cannot include any student or observer enrollments.
- Blueprint courses do not have to be published.
- Blueprint courses do not include the Reset Course Content button, as content cannot be reset.
- Blueprint courses are not supported for courses across trust accounts. A course in one account cannot be a blueprint course for another account.
- Blueprint courses do not sync certain course settings to associated courses, including timezone, term, and course format.
- Blueprint courses include similar functionality with Canvas Commons. To learn more about Canvas Commons, see the Blueprint Courses and Canvas Commons Comparison PDF.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the Courses link.

Note: When you open an account, the account defaults to the Courses page.

Find Course

Use the filter and search options to find the course in the account.

Open Settings
In the search results, click the **Settings** link for the course.

**Open Course Details**

Click the **Course Details** tab.

**Enable Course**

Click the **Enable course as a Blueprint Course** checkbox.
View Restrictions

If the course cannot be enabled as a blueprint course, the checkbox is grayed out [1]. A course cannot be enabled as a blueprint course if the course contains student enrollments.

If the course is already associated with a blueprint course, you can view the course name and course ID as a reference (e.g. courses/XXX) [2]. The name of the blueprint course includes a link to access the blueprint course.
Define General Locked Objects

By default, the course is defined for General Locked Objects, meaning that any objects locked in the blueprint course are subject to general attributes that cannot be edited in associated courses.

Select Attributes
As part of the general settings, select the attributes for the locked objects in this course. General locked objects support four attributes across any course object: content, points, availability dates, and due dates.

The option to lock content is selected by default, though it can be deselected as a lock option.

Locked objects cannot be edited in associated courses. For instance, when Content is selected as a locked object attribute, instructors in associated courses are not able to edit any content for any locked objects. Content also includes the title of the content item.

Define Locked Objects by Type

To define locked objects by type, select the Locked Objects by Type option. This setting means that any objects locked in the course are subject to specific settings set by type that cannot be edited in associated courses.
Select Attributes

Blueprint courses support and sync five object types: assignments, discussions, pages, files, and quizzes. To select an attribute for an object type, expand the attribute type menu and select individual attributes that apply to each locked object. When an attribute is selected, the attribute name displays next to the object type.

**Notes:**

- Attributes do not need to be the same for each object type. Additionally, depending on the object type, not all attributes may be available.
- Rubrics can be updated and synced as part of blueprint courses. However, if points have been locked for an assignment, updating the rubric’s point value does not affect the assignment point value.
Update Course Details

Click the Update Course Details button.
How do I associate a course with a blueprint course as an admin?

As an admin, you can associate active courses with a blueprint course. Associated courses receive synced updates from the blueprint course. Once a course is associated with a blueprint course, it cannot be associated with any other blueprint course.

Associated courses must reside in the same or a lower subaccount than where the blueprint course resides. In each associated course, the name of the blueprint course is displayed in the Course Settings page, and users with permission to manage the blueprint course can access the blueprint course through a direct link.

Content that can be managed by an instructor is not overwritten when the Blueprint Course is synced to associated courses, and new content that is added to any associated course is also not affected.

After a course is associated with a blueprint course, the blueprint course will create an initial sync that included all course content. You can choose to associate courses after all course content is created, or you can associate courses immediately and sync the blueprint course later when the blueprint content is complete.

Concluded Courses

Courses that are associated with a blueprint course and have been concluded will continue to receive any synced changes from the blueprint course. The status of a course does not affect the blueprint sync. If a concluded course should not receive synced changes from the blueprint course, the course should be removed as an associated course.

Notes:

- Only admins can associate courses to a blueprint course. Any instructor who is enrolled in the blueprint course can make changes and sync content to associated courses but cannot control the course association.
- LTI tools may be affected in associated courses. After the course syncs, verify the settings for LTI tools are configured correctly in associated courses.
- If a course's association with a blueprint course is removed, the course will no longer receive synced updates and course content will no longer be locked. Content synced from the blueprint course will remain in the course after the association is removed.
- Blueprint courses do not sync certain course settings to associated courses, including timezone, term, and course format.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the Courses link.

Note: When you open an account, the account defaults to the Courses page.

Find Course

Use the filter and search options to find the course in the account.

For Blueprint courses, you can filter by selecting the Show only blueprint courses checkbox.
In the search results, click the name of the course.

**Open Associations**

In the Course Home Page, click the Blueprint sidebar tab [1], then click the **Associations** link [2].

*Note:* You can access the Blueprint sidebar from any Course Navigation page.
Filter Courses

Search Courses

The Associations page displays any courses that are associated with the blueprint course. Once a course is associated with a blueprint course, it cannot be associated with any other blueprint course.

To filter courses by term, click the Terms menu [1]. To filter courses by subaccount, click the Subaccount menu [2].

You can also locate a specific course in the search field [3]. Enter the title, short name (course code), or SIS ID for a course. Course nicknames are not supported in the search field. Deleted courses do not display in search results.
Once a term or subaccount is selected, the Courses list will expand and display all results in the selected term or subaccount. If an entry is added to the search field, the list will update with any relevant search results.

Search results display the course title [1], short name (course code) [2], term [3], SIS ID [4], and any teacher (instructor) enrollments [5].

**Note:** Search results will display up to 100 courses. If you wish to associate more than 100 courses at a time, consider creating a [CSV file](#) to upload using the [SIS import tool](#).
Add Courses

To associate a course with the blueprint course, click the checkbox next to the course title [1]. You can select multiple courses at one time, or you can select all courses by clicking the Select All Courses checkbox [2].

Selected courses display in the Associated Courses section [3].

To remove a course as an association, click the Remove icon [4].

View Unsynced Warning

Warning: You have unsynced changes that will sync to all associated courses when a new association is saved.

If you have unsynced changes in your blueprint course when you are associating a course, Canvas generates a warning to let you know the unsynced changes will be synced to all associated courses.
Save Courses

Click the Save button.

Confirm Courses

Associations saved successfully

View your associated changes were saved.

Modify Associations

<table>
<thead>
<tr>
<th>Associated</th>
<th>Short Name</th>
<th>Term</th>
<th>SIS ID</th>
<th>Teacher(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Geography 101-A</td>
<td>CLC-A</td>
<td>Default Term</td>
<td></td>
<td>Doug Roberts</td>
</tr>
<tr>
<td>To be Added</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Geography 101-B</td>
<td>CLC-B</td>
<td>Default Term</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can add and save additional associated courses, if necessary.

To remove a course, click the Remove icon.
When you are finished with course associations, click the **Done** button.

**View Sync**

![Blueprint](image)

- **Associations**: 2

**Sync History**

- **Processing**
  - This may take a bit...

After a course is associated with a blueprint course, the blueprint course will create an initial sync that includes all course content.

Once a sync has started, the sidebar shows the sync status as long as you are viewing the page. You can leave the page, but know that the sync may take a while to process.

**Notes:**

- If you immediately view an associated course and don't see any updates, the sync may still be in process. To confirm sync completion, enable the Blueprint sync notification in User Settings.
- Sync history will show the date and time the sync was made but no details will be included related to the sync.
How do I lock course objects in a blueprint course as an admin?

Within an individual blueprint course, you can lock and unlock course objects and sync content for the blueprint course. If you are not sure how objects were defined for the course, you can view them in the Course Settings Course Details tab. Attributes for locked objects may be changed in Course Settings at any time.

If you enroll an instructor in a blueprint course, the instructor can also lock and unlock course objects. By default, objects in blueprint courses are unlocked.

Locked Objects

Locking an object in a course enforces the attributes defined in Course Settings. Any change to an attribute retroactively applies to all locked objects in the associated course. If an attribute is enabled for locked objects in the blueprint course, any locked attributes in the associated course that vary from locked attributes in the blueprint course will trigger unsynced changes in the blueprint course and override the associated course objects.

Locking or unlocking an object applies immediately to all associated courses. However, the change will still be noted as an unsynced change and will not appear in the Sync History page until the sync is complete. Additionally, changes are not identified as an unsynced change until the page is refreshed.

Unlocked Objects

Objects that are unlocked can be managed by a course instructor like any other Canvas object. If the blueprint course is synced and the instructor has modified unlocked objects in the associated course, unlocked objects are not overwritten with the synced changes.

Unlocked blueprint objects can be locked at any time. If you lock an unpublished object, and that object was previously removed from an associated course, the object will be replaced in the associated course.

Object Management

This lesson shows how to lock an object from the Assignments page. Objects can also be managed in the Files, Modules, Pages, and Quizzes pages.

In Modules, only individual module items can be locked. Changes to the modules structure are triggered as part of a course sync.

Note: You can only lock and unlock objects created in the blueprint course. Any new objects added to an associated course by an instructor does not include a blueprint icon and is not associated with the blueprint course.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the Courses link.

Note: When you open an account, the account defaults to the Courses page.

Find Course

Use the filter and search options to find the course in the account.

For Blueprint courses, you can filter by selecting the Show only blueprint courses checkbox.
Open Course

In the search results, click the name of the course.

Open Assignments

In Course Navigation, click the Assignments link.

Note: Objects can also be managed in the Files, Modules, Pages, and Quizzes pages.
**View Icon Status**

In any Index page, you can view the status of each object. White squares indicate the object is unlocked [1]. Blue squares with a lock icon indicate the object is locked [2].

By default, objects are unlocked. You can change the status of an object by toggling the lock and unlocked icons.

**Lock Object**

To lock an object, click the object’s unlocked icon. The hover text will confirm you want to lock the object.

**Unlock Object**

To unlock an object, click the object’s lock icon. The hover text will confirm you want to unlock the object.
View Status in Individual Object

Except within Files, blueprint status can be modified within individual objects.

Files can only be locked or unlocked in the Files Index Page.

Lock Object

Assignment 3: Surf's Up - Beach Analysis

Assignment 3: Surf's Up - Beach Analysis

To lock an unlocked object, click the Blueprint button. The button will change from gray to blue and indicate the object is locked.
Unlock Object

Individual objects show the attributes that have been locked.

To unlock a locked object, click the **Locked** button. The button will change from blue to gray and indicate the object is unlocked. The locked attributes banner will also be removed from the page.
View Instructor Access

Assignment 3: Surf's Up - Beach Analysis

With your group members, analyze the surf and beach zone to explain different types of waves and surf.

You should include media (photos or video) during our field trip for this topic.

Instructors can view locked and unlocked icons in the Index page. However, they cannot manage the existing status of an object.

For locked objects, the individual page displays the locked attributes selected in Course Settings, if any. Instructors cannot modify locked objects, so any attributes that are locked cannot be edited.
Assignment 3: Surf’s Up - Beach Analysis

With your group members, analyze the surf and beach zone to explain different types of waves and surf.

You should include media (photos or video) during our field trip for this topic.

Points: 5
Assignment Group: Assignments 2
Display Grade as: Points 2

☐ Do not count this assignment towards the final grade

Assign

Assign to:
Everyone

Due:
Aug 17 at 11am

Available from: [ ] Until: [ ]
How do I sync course content in a blueprint course as an admin?

When a course is first associated with a blueprint course, the associated courses are immediately synced. After the initial sync, changes must be synced to associated courses manually.

As an admin, you can sync blueprint content changes to associated courses. Additionally, any instructor who is enrolled in the blueprint course can also make changes and sync content to associated courses.

Content Sync

After a change is made to an object or attribute as defined in Course Settings, the blueprint course sidebar display a sync option indicating that unsynced changes have been made in the course. Content can be synced at any time.

All course content will be included in a blueprint sync, regardless of whether content is locked. Changed content will always overwrite the existing content in the associated courses for all locked objects. Content that can be managed by an instructor or new content created in an associated course by the instructor is not affected.

Notifications within associated courses can only be sent if the notification trigger has not yet occurred. Features such as announcements in a blueprint course may need to be created as a delayed post so the announcement displays in the associated course after syncing course content.

Content State

The sync will include the state of each object as it exists in the blueprint course. For instance, if an assignment is unpublished in the blueprint course, it will also be unpublished in the associated course. However, once the state is changed in the associated course, the state within the blueprint course will no longer apply.

Modules Exceptions

If a blueprint course includes Modules, changes to the modules structure are triggered as part of a course sync. Module items cannot be locked, but course state applies to all individual module items.

The following sync exceptions apply for Modules content:

- Associated courses match the modules structure initially created in the blueprint course. Any additional modules and their content added to the blueprint course and synced to associated courses will always be added to the bottom of the Modules page in the associated courses.
- If modules or module items are rearranged in an associated course, the module order will be updated to match the blueprint course structure in the next sync. If a module item in an associated course is moved to another module, the module item will exist in both modules.
- Modules created from a blueprint course and deleted from an associated course will not be restored in additional course syncs.
- New module items added to a module in an associated course will remain in the module but will display above all blueprint synced module items.
• If a module lock date is added or updated in an associated course, the module setting will be updated to match the module setting in the blueprint course in the next sync.
• If a module prerequisite is added or updated in an associated course, the module setting will be updated to match the module setting in the blueprint course in the next sync.

Notes:
• Changes within Course Settings do not trigger unsynced changes. The course only recognizes unsynced changes when a change is made to course content.
• Instructors in associated courses can view the latest blueprint sync information in Course Settings.
• If an assignment in a blueprint course is muted, the muted status is not synced to the same assignment in associated courses.
• Quizzes.Next assessments are only synced to blueprint courses during the initial sync. Changes to Quizzes.Next assessments are not included in subsequent sync attempts.
• Blueprint courses do not sync certain course settings to associated courses, including timezone, term, and course format.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the Courses link.

Note: When you open an account, the account defaults to the Courses page.

Find Course

Use the filter and search options to find the course in the account.

For Blueprint courses, you can filter by selecting the Show only blueprint courses checkbox.
Open Course

In the search results, click the name of the course.

Open Blueprint Sidebar

In the Course Home Page, click the Blueprint sidebar tab.

Note: You can also access the Blueprint sidebar from any Course Navigation page.
View Sidebar

The Blueprint sidebar provides quick access to blueprint sync information.

If any changes have been made in the course, the sidebar displays the number of unsynced changes in the course [1]. All course content is copied in the sync regardless of whether or not objects are locked. The only exception is Course Settings, which must be selected on a per-sync basis as part of the sync options [2]. You can also create a notification about the sync from the sidebar [3].

If you know what content is being synced and you are ready to sync your content, you can sync updates directly from the sidebar [4].
View Unsynced Changes

If you are not sure what content is being synced, or if you just want to confirm existing changes in the course, you can view specific details about the unsynced changes by clicking the **Unsynced Changes** link.
The Unsynced Changes page shows the specific content that has been updated. Each content object shows the current status of the object (locked or unlocked) [1], the name of the content item [2], the content change [3], and the content object type [4].

Content changes can be created, updated, or deleted. Updated changes indicate any change to existing content.

### Select Sync Options

- **Include Course Settings**
- **Send Notification**
- **Add a Message (0/140)**

Course Settings include all settings options in the course, including Course Navigation. To sync Course Settings to associated courses, select the Include Course Settings checkbox [1].
If you want to send a notification about the blueprint sync, click the **Send Notification** checkbox [2]. Other admins and instructors can set the Blueprint sync notification and receive updates when a sync is complete.

To add a message as part of the notification, click the **Add a Message** checkbox [3]. The message can be added as a reference to note what changes were made in the sync and displays in the Sync History page.

**Sync Changes**

Click the **Sync** button.

**View Sync**

Once a sync has started, the sidebar shows the sync status as long as you are viewing the page. You can leave the page, but know that the sync may take a while to process.
Note: If you immediately view an associated course and don't see any updates, the sync may still be in process. To confirm sync completion, enable the Blueprint sync notification in User Settings.
How do I view the sync history for a blueprint course as an admin?

Once a sync has been made in a blueprint course to associated courses, the sync is recorded in the Sync History page. You can view Sync History to view prior syncs and details about the sync.

Any instructor who is enrolled in the blueprint course can also make changes and sync content to associated courses. Synced changes from the instructor also display in the Sync History page. Please be aware that if multiple users are syncing a blueprint course, the Sync History page does not show the user who initiated the blueprint sync.

The Sync History page records the last five syncs to the blueprint course.

Notes:

- If sync history shows no sync details, the blueprint course was being synced to an associated course. The sync history for association syncs show the date and time the sync was made but no additional details are included.
- Instructors in associated courses can view the latest blueprint sync information in Course Settings.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Courses

In Course Navigation, click the Courses link.

Note: When you open an account, the account defaults to the Courses page.

Find Course

Use the filter and search options to find the course in the account.

For Blueprint courses, you can filter by selecting the Show only blueprint courses checkbox.
Open Course

In the search results, click the name of the course.

Open Sync History

In the Course Home Page, click the Blueprint sidebar tab [1], then click the Sync History link [2].

Note: You can access the Blueprint sidebar from any Course Navigation page.
View Sync History

The Sync History page shows information about the last five syncs to the blueprint course. The page displays the date and time of the sync [1] and the number of changes [2].

If a message was included as part of the notification, the message is displayed above the list of synced changes [3].

For an initial course association, sync history will show the date and time the sync was made but no details will be included related to the sync.
View Sync Details

Fri Jul 14, 2017 2:46pm  4 pushed changes

"Added new assignment and updated various due dates."

1  2  3  4  5

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Image" alt="Assignment" />  Assignment 5: Ocean Predators</td>
<td>Assignment</td>
<td>Created</td>
<td>Applied</td>
<td></td>
</tr>
<tr>
<td><img src="Image" alt="Geography" />  Geography 101</td>
<td>Rubric</td>
<td>Updated</td>
<td>Applied</td>
<td></td>
</tr>
<tr>
<td><img src="Image" alt="Introductions" />  Introductions</td>
<td>Discussion</td>
<td>Updated</td>
<td>Applied</td>
<td></td>
</tr>
<tr>
<td><img src="Image" alt="Assignment" />  Assignment 1: Concept Map - Seafloor Spreading</td>
<td>Assignment</td>
<td>Updated</td>
<td>Applied</td>
<td></td>
</tr>
</tbody>
</table>

The Sync History page shows the specific content that has been synced. Each content object shows the synced status of the object (locked or unlocked) [1], the name of the content item [2], the content change [3], the content object type [4], and whether or not the sync was applied [5].

Content changes can be created, updated, or deleted. Updated changes indicate any change to existing content.

View Sync Exceptions

1 EXCEPTION

Field Trips

Page  Updated

Content changed exceptions:

- Default Term - Geography 101-A  CLC-A

The Sync History page may show items with a sync exception. Exceptions occur when content is not synced because the content was modified in an associated course before the blueprint course was synced.

An exception is noted by the Exception indicator [1], which includes the number of exceptions.
To view which course(s) had an exception, click the arrow icon next to the name of the content item [2]. The term and name of the course is shown in the expanded details.

**Close Sync History**

When you are finished with the Sync History page, click the **Done** button.
External Apps (LTI)
How do I use the Canvas App Center in an account?

The App Center is your gateway to powerful teaching tools that are easily integrated into a Canvas account or Canvas course. In the App Center, you can specify which external applications will integrate with your Canvas account. Tools available at the account level are also available to all the courses in the account or sub-account.

Open Settings

In Account Navigation, click **Settings** link.

Open Apps

Click the **Apps** tab.
View App Center

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some tools that work great with Canvas.

The App Center shows all apps available in your account [1]. You can also filter by installed [2] and not installed [3], or use the search field to locate a specific app [4].
View App

To view a quick description of an app, hover over the app. To view all details, click the app.

View App Details

Khan Academy

Search for and embed Khan Academy videos into course material. Khan Academy focuses on short lessons on math, science, etc. Uses the embedded player so students earn points for watching videos.

Currently no search functionality is provided through the Khan Academy API so we can't add search, but once that's supported on their side we'll definitely add it.
On the details page, you can view a description of the app [1]. When you are ready to install the app with the proper credentials, you can add the app as a tool for your course [2].

**Note:** The Canvas App Center does not always contain all the information about an app. You may want to visit the Edu App Center for complete information about the external app you want to configure.

### Manage App List

#### External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

To manage your Edu App Center whitelist in Canvas, click the Manage App List button. The access token syncs the External Apps list at both the account and course levels to only show apps from the Edu App Center whitelist set up for the organization.
View App Configurations

**External Apps**

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

*See some LTI tools that work great with Canvas.*

To view existing apps and configurations in your course, click the **View App Configurations** button.
Manage Apps

<table>
<thead>
<tr>
<th>Name</th>
<th>Settings</th>
<th>Edit</th>
<th>Placements</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canvabades</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canvas Data Portal</td>
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</tr>
<tr>
<td>Canvas Parent</td>
<td></td>
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</tr>
<tr>
<td>Chat Tool</td>
<td></td>
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</tr>
<tr>
<td>CP</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Required Trainings Management</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>SCORM</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnitin LTI</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To view configurations for an external app, click the app's **Settings** icon [1]. To edit the app, click the **Edit** link [2]. To view placements for the app, click the **Placements** link [3]. To Delete the app, click the **Delete** link [4].

**Note:** At the course level, any apps added at the account level display a lock icon and cannot be edited.
View App Placements

App Placements shows the places in Canvas where your app can be used.

The **Assignment Selection** placement [1] adds the application to the list of LTI options when creating LTI assignments.

The **Editor Button** placement [2] adds a link to this tool in the Rich Content Editor.

The **Link Selector** placement [3] adds the application to the list of module items. A link directly to the LTI will be added to the Modules page.

**Note:** You may see a No Placements Enabled message. This message indicates that the app does not have any specified placements within Canvas. However, the app will still work as intended.
How do I manage a whitelist in the Edu App Center?

The Edu App Center allows you to create a whitelist of external apps for your institution. After you have created a whitelist, you can manage your whitelist in Canvas and only display approved external apps to courses in your account and subaccounts.

Log in to Edu App Center

In the browser's search bar, type eduappcenter.com and click the Login link.

Select how you want to log in by choosing Twitter, Github, Microsoft, Google, or creating an account using an email.
Open Organizations

Click the **Admin** link [1]. In the drop-down menu, select the **Organizations** link [2].

Create Organization

Click the **Create Organization** button.
Enter Information

Create Organization

1. Name

2. □ Show apps without having to pre-approve them

3. Ʉ Save Changes  Cancel

Enter your Organization Name [1] and if you desire, select the Show apps without having to pre-approve them checkbox [2].

Click the Save Changes button [3].

Manage Whitelist

Organization: Documentation Team

<table>
<thead>
<tr>
<th>Details</th>
<th>0 Apps</th>
<th>1 Members</th>
<th>0 App Center Tokens</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Documentation Team</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approval</td>
<td>Show apps without having to pre-approve them</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Created</td>
<td>Jan 13, 2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner Level</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Click the **Manage Whitelist** button.

### Manage Apps

![Manage Whitelist](image)

#### Manage Whitelist

By default, all apps are hidden. Hidden apps do not appear in the app center list. You can show or hide all apps by clicking the **Allow All** or **Hide All** buttons [1].

Show or hide individual apps by clicking the **Hidden** [2] and **Visible** [3] buttons next to the app.

When you are finished, return to your organization page by clicking the name of your organization [4].
Manage Keys

To create an API Token, click the **Manage Keys** button.

Create New Token

Click the **Create New Token** button.

Share API Token

<table>
<thead>
<tr>
<th>Tokenable</th>
<th>API Token</th>
<th>Created</th>
</tr>
</thead>
</table>
Copy the API token to use for your whitelist.

An API token can be used to manage whitelists directly in Canvas and display approved apps at the account, subaccount, and course levels.

**Note:** An organization can create multiple tokens, but each token directs to the same whitelist. Multiple tokens can be used to create access for specific users and deleted at a later date.
How do I manage an Edu App Center whitelist in Canvas?

If your institution is using an Edu App Center whitelist, you can manage your whitelist directly in Canvas. To apply the whitelist, you will need to know the API token created for your Edu App Center organization. The access token syncs the External Apps list at both the account and course levels to only show apps from the Edu App Center whitelist set up for the organization.

Admins can manage the app list at any time to remove or replace an access token. When an account or subaccount does not include an access token, the External Apps list displays the default app list provided by Canvas. Whitelists can only be managed at the account and subaccount levels.

Canvas only accepts one API token for an organization. A token applied at the account level automatically filters down to all subaccounts. The Edu App Center supports creating multiple tokens for an organization, but each token directs to the same whitelist. If you want to create separate whitelists that apply to individual subaccounts, you'll need to create additional organizations in the Edu App Center and create API tokens for each whitelist.

Open Settings

In Account Navigation, click the Settings link.
Open Apps

Click the Apps tab.

Manage App List

External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

Click the Manage App List button.
Enter API Token

Enter the access token for your organization from eduappcenter.com. Once applied, only apps your organization has approved in the EduAppCenter will be listed on the External Apps page. Learn how to generate an access token.

Access Token

In the Access Token field [1], enter the API Token from your Edu App Center organization.

Click the Save button [2].
View Apps

External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

View the list of approved apps from your whitelist.
How do I configure an LTI key for an account?

As an admin, you can configure an LTI key from the Developer Keys page. LTI keys can be used to enable an external app that supports [IMS Global LTI 1.3 and LTI Advantage](#).

When supported by a tool provider, this framework allows admins to manage all LTI tool configuration data directly in the Developer Keys page. The LTI can then be [added to an account](#) or a course via an associated client ID.

LTI keys can only be configured in accounts that have enabled the LTI 1.3 and LTI Advantage feature option. This feature option should only be enabled by Canvas admins to configure tools that include LTI Advantage services. Specific questions about a provider’s integration or potential integration with the LTI 1.3 and LTI Advantage framework should be sent directly to the tool provider.

**Note:** Developer Keys is an account permission. If you cannot view the Developer Keys link in Account Navigation, this permission has not been enabled for your user account.

Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open Developer Keys

In Account Navigation, click the **Developer Keys** link.

Add LTI Key

Click the **Add Developer Key** button [1]. Then click the **Add LTI Key** option [2].

**Note:** If you cannot view the Add LTI Key option, the LTI 1.3 and LTI Advantage feature option has not been enabled in your account.
Enter LTI Settings

Enter the settings for the LTI key:

- **Key Name** [1]: The name of the company or external tool.
- **Owner Email** [2]: The email of the person who owns the external tool.
- **Redirect URIs** [3]: Redirect URI data should be provided by the tool provider.
- **Notes** [4]: Any notes about the LTI key, such as the reason it was created.

To create an LTI key that can only be used in the Canvas test environment, click the **Test Cluster Only** checkbox [5].
Select Configuration Method

To select the method you want to use to configure your LTI tool, click the **Method** drop-down menu.

Enter Manual Entry Details

To manually enter the details for your LTI key, click the **Manual Entry** option [1].

If the tool provider requests that their tool be set up via manual entry, they will need to provide the details to fill the required fields. Required fields are title [2], description [3], target link URL [4], OpenID connect initiation URL [5], and public JWL [6].
You can also enter non-required details for LTI Advantage services [7], additional settings [8] and placements [9]. Any items selected in the Placements field will display as LTI setting items [10].

**Note:** If the LTI vendor is unable to provide the information for the required fields, you may want to configure the tool via the Paste JSON or Enter URL option.

**Enter JSON Details**

![Configuration Interface]

To paste JSON formatting for your LTI 1.3 configuration, click the **Paste JSON** option [1].

Then enter the JSON formatting in the **LTI 1.3 Configuration** field [2].

**Enter JSON URL**

![Configuration Interface]

To enter a JSON URL, click the **Enter URL** option [1]. Then enter the JSON URL in the **JSON URL** field [2].
Save LTI Key

To save your LTI key, click the Save button.

View LTI Key

View your LTI key [1]. LTI keys are indicated by the External Tool icon [2].

Each LTI key includes a client ID [3]. Copy or write down the client ID to enable the external tool from your Account Settings or to share it with users to enable the tool in a course.
How do I configure an external app for an account using a URL?

Some external apps require a URL configuration. This lesson shows how to add an external tool using the URL provided by the external app provider. To learn more about configuring external apps, visit the Edu App Center.

Notes:
- External apps can also be configured using a URL in sub-accounts.
- Manually configuring an external app is an account permission. If you cannot configure an external app, this permission has not been enabled for your user role.

Open Settings

In Account Navigation, click the Settings link.

Open Apps

Click the Apps tab.
View App Configurations

External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

To configure an app, click the View App Configurations button.

Add New App

External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

Click the Add App button.

Set Configuration Type

Select the Configuration Type drop-down menu and set the configuration type to By URL.
Add App Details

<table>
<thead>
<tr>
<th>Name</th>
<th>Consumer Key</th>
<th>Shared Secret</th>
</tr>
</thead>
</table>

Enter the name of the app in the **Name** field [1]. Enter the consumer key in the **Consumer Key** field [2] and the shared secret in the **Shared Secret** field [3]. This key and shared secret will be provided by the vendor or (if using the Edu App Center) provided by the website.

**Note:** There are some apps that do not require a consumer key or shared secret, so pay attention to the configuration directions.
Add Configuration URL

In the Configuration URL field, enter the URL for the app. Apps are configured and recommended to be entered as secure links (HTTPS).

Submit App

Click the Submit button.
Verify App

If the app has already been added in the account, Canvas verifies that you still want to install the app. To continue, click the Yes, Install Tool button.

Note: Verifications only take place in the same context for an existing external app (such as installing the same app multiple times in the root account).

View App

<table>
<thead>
<tr>
<th>Name</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canvabadges</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canvas Data Portal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canvas Parent</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chat Tool</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

View the external app.

To manage the app, click the Settings icon [1]. To edit the app, click the Edit link [2]. To see the places where the app appears in Canvas, click the Placements link [3]. To delete the app, click the Delete link [4].
**Note:** When you click the Placements link, you may see a No Placements Enabled message. This message indicates that the app does not have any specified placements within Canvas. However, the app will still work as intended.
How do I configure an external app for an account using XML?

Some external apps require an XML configuration. This lesson shows how to add an external tool using the XML provided by the external app provider. To learn more about configuring external apps, visit the Edu App Center.

**Notes:**

- External apps can also be configured using XML in sub-accounts.
- Manually configuring an external app is an account permission. If you cannot configure an external app, this permission has not been enabled for your user role.

Open Settings

In Account Navigation, click the **Settings** link.

Open Apps

Click the **Apps** tab.
View App Configurations

External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

To configure an app, click the View App Configurations button.

Add New App

External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

Click the Add App button.

Set Configuration Type

Select the Configuration Type drop-down menu and set the configuration type to Paste XML.
Add App Details

Enter the name of the app in the **Name** field [1]. Enter the consumer key in the **Consumer Key** field [2] and the shared secret in the **Shared Secret** field [3]. This key and shared secret will be provided by the vendor or (if using the [Edu App Center](https://edu.canvas.net)) provided by the website.

**Note:** There are some apps that do not require a consumer key or shared secret, so pay attention to the configuration directions.

Enter Configuration XML

Enter the configuration XML code here.
In the **XML Configuration** field, paste the XML code.

### Submit App

![Submit Button](image)

Click the **Submit** button.

### Verify App

![Verify App](image)

This tool has already been installed in this context. Would you like to install it anyway?

No, Cancel Installation  Yes, Install Tool

If the app has already been added in the account, Canvas verifies that you still want to install the app. To continue, click the **Yes, Install Tool** button.

**Note:** Verifications only take place in the same context for an existing external app (such as installing the same app multiple times in the root account).
View App

<table>
<thead>
<tr>
<th>Name</th>
<th>Settings</th>
<th>Edit</th>
<th>Placements</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canvabadges</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canvas Data Portal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canvas Parent</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chat Tool</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

View the external app.

To manage the app, click the **Settings** icon [1]. To edit the app, click the **Edit** link [2]. To see the places where the app appears in Canvas, click the **Placements** link [3]. To delete the app, click the **Delete** link [4].

**Note:** When you click the Placements link, you may see a No Placements Enabled message. This message indicates that the app does not have any specified placements within Canvas. However, the app will still work as intended.
How do I configure an external app for an account using a client ID?

External apps that support LTI 1.3 and LTI Advantage require configuration using a client ID. The client ID can be found by configuring an LTI key from the Developer Keys page.

Notes:
- External apps cannot be configured using a client ID in sub-accounts.
- Manually configuring an external app is an account permission. If you cannot configure an external app, this permission has not been enabled for your user role.

Open Settings

In Account Navigation, click the **Settings** link.

Open Apps

Click the **Apps** tab.
View App Configurations

External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

To configure an app, click the View App Configurations button.

Add New App

External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

Click the Add App button.
Set Configuration Type

Select the Configuration Type drop-down menu and set the configuration type to **By Client ID**.

Enter Client ID

Enter the client ID in the **Client ID** field [1].

Then click the **Submit** button [2].

**Note:** If you do not have a client ID, you must first **configure an LTI key**.
View Error Message

If the submitted client ID is not found in your account's developer keys, Canvas will display an error message.

Install App

To install the app, click the Install button.

Tool "LTI 1.3 with assignment selection" found for client ID 370000000000000136. Would you like to install it?

[Cancel] [Install]
View App

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

View your app on the External Apps page [1].

To manage your app, click the Settings icon [2].

To edit the app, click the Edit link [3]. To see the places where the app appears in Canvas, click the Placements link [4].

If the app supports LTI Advantage, the Settings menu may also display a Deployment ID link. To view the Deployment ID for the app, click the Deployment ID link [5]. App providers who utilize LTI Advantage may require this Deployment ID for app functionality.

To delete the app, click the Delete link [6].
How do I configure an external app for an account using an LTI 2 Registration URL?

Some similarity detection external apps can be configured using an LTI 2 registration URL. This lesson shows how to add an external tool using a URL provided by the external app provider. To learn more about configuring external apps, visit the Edu App Center.

Notes:

- External apps can also be configured using an LTI 2 registration URL in sub-accounts.
- Configuring an external app is an account permission. If you cannot configure an external app, this permission has not been enabled for your user role.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Settings

In Account Navigation, click the Settings link.

Open Apps

Click the Apps tab.

View App Configurations

External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.
To configure an app, click the View App Configurations button.

**Add New App**

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

Click the Add App button.

**Select Configuration Type**

Click the Configuration Type drop-down menu and select By LTI 2 Registration URL.

**Add Registration URL**

In the Registration URL field, enter the URL for the app.

Apps are configured and recommended to be entered as secure links (HTTPS).
Launch Registration Tool

Click the Launch Registration Tool button.

**Note:** You may have to confirm settings or provide additional information in the Registration Tool.

Verify App

Add App

This tool has already been installed in this context. Would you like to install it anyway?

If the app has already been added in the account, Canvas verifies that you still want to install the app.

To continue, click the Yes, Install Tool button.

View App

Turnitin LTI
View the external app.

To manage the app, click the **Settings** icon [1]. To edit the app, click the **Edit** link [2]. To see the places where the app appears in Canvas, click the **Placements** link [3]. To delete the app, click the **Delete** link [4].
How do I configure a manual entry external app for an account?

You can manually configure an external app in your account settings in Canvas. However, configuring an external app by URL is more common.

To learn more about configuring external apps, visit the Edu App Center.

**Note:** Manually configuring an external app is an account permission. If you cannot configure an external app, this permission has not been enabled for your user role.

Open Settings

In Account Navigation, click the **Settings** link.

Open Apps

Click the **Apps** tab.
View App Configurations

External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

To configure an app, click the View App Configurations button.

Add App

External Apps

Apps are an easy way to add new features to Canvas. They can be added to individual courses, or to all courses in an account. Once configured, you can link to them through course modules and create assignments for assessment tools.

See some LTI tools that work great with Canvas.

Click the Add App button.

Set Configuration Type

Select the Configuration Type drop-down menu and set the configuration type to Manual Entry.
Add App Details

In the name field, type the name of the app [1]. Type the consumer key [2] and the shared secret [3] in the appropriate fields.

Add Launch URL and Domain

In the Launch URL field [1], enter the Launch URL (source of the iframe for the link) to match the app to Canvas. Example: https://www.launchurl.com

You can choose to enter a domain in the Domain field [2]. The domain is optional and may be included with or replace launch URL. Type the appropriate URL or domain in the domain field. Example: domain.com

Note: URLs must be iframe enabled and accept POST requests. Additionally, apps are configured and recommended to be entered as secure links (HTTPS).
Set Privacy

Select the Privacy drop down menu to set the privacy settings:

1. **Anonymous**: No identifying information about the user will be sent to the vendor.
2. **Email Only**: The user’s email is the only identifying information sent to the vendor.
3. **Name Only**: The user’s name is the only identifying information sent to the vendor.
4. **Public**: Various identifying information (name, email, Canvas ID, SIS ID of the course, SIS ID of user, etc.) is sent to the vendor.

Add Custom Fields and Descriptions

<table>
<thead>
<tr>
<th>Custom Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>One per line. Format: name=value</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
</tbody>
</table>
Type a custom field in Custom Fields [1]. Custom fields can be used to add extra parameters, such as making the tool appear in an embedded or mini state.

Type a description of the app in the Description field [2].

**Submit App**

Click the Submit button.

**Verify App**

This tool has already been installed in this context. Would you like to install it anyway?

If the app has already been added in the account, Canvas verifies that you still want to install the app. To continue, click the Yes, Install Tool button.

**Note:** Verifications only take place in the same context for an existing external app (such as installing the same app multiple times in the root account).
View the newly configured external app.

To manage the app, click the Settings icon [1]. To edit the app, click the Edit link [2]. To see the places the app will appear, click the Placements link [3]. To delete the app, click the Delete link [4].

Note: When you click the Placements link, you may see a No Placements Enabled message. This message indicates that the app does not have any specified placements within Canvas. However, the app will still work as intended.
Field Admin Console - Classic Interface
How do I use the home page of the classic Field Admin Console?

The Field Admin Console is the Canvas Support ticketing system. As a Field Admin, you will see a table of your cases when you log in.

This lesson describes how to use the home page of the classic interface of the Field Admin Console. You can also use the new interface of the Field Admin Console.

View Home Page

View the Admin Console home page by logging in at cases.canvaslms.com. The home page consists of a few elements:

- Global Navigation [1]
- Search Tool [2]
- Create a New Case [3], Reports [4], and Dashboard [5] buttons
- Cases Table [6]
View Global Navigation

The Global Navigation Menu provides you with quick access to the Home Page [1], Cases [2], Reports [3], and Dashboard [4]. Global Navigation can be accessed from any page in the Admin Console.

View Search Tool

To search for a case or user, enter the case number or user into the Search Cases and Users... field [1] and click the Search button [2].

Create New Case

To create a new case, click the Create New Case button.
View Reports

To view your reports, click the View Reports button.
Reports can also be accessed from the Global Navigation Menu.

View Dashboard

To view the dashboard, click the View Dashboard button.
The Dashboard can also be accessed from the Global Navigation Menu.

View Cases Table

The Cases table provides links to new, open, pending, on hold, and solved cases. Learn more about viewing cases.
View New Cases

The New Cases tab gives you an overview of your cases including the Case Number, Status, Subject, Case Creator, Case Owner, Date/Time Opened, and Account [1]. You can search for a case using the Search field and sort the table columns [2].

View Macros Tab

The Macros tab allows you to create new macros and view existing macros.
View Key Links Tab

The Key Links tab will provide you with helpful links to help find answers.

View Settings Tab

The Settings tab allows you to update the time zone for your account.

To change your time zone, select your desired option from the drop-down menu [1] and click the Update button [2].
How do I access the Dashboard in the classic Field Admin Console?

The Field Admin Console dashboard provides a quick view of graphs for the default reports: Tickets Created By Month, Tickets By Origin, and Canvas Component Affected.

This lesson describes how to use the home page of the classic interface of the Field Admin Console. You can also use the new interface of the Field Admin Console.

Open Dashboard

From the Field Admin Console home page, click the Dashboard link [1] or the View Dashboard button [2].
View Dashboard

View the Dashboard. It contains graphs for Tickets Created By Month, Tickets By Origin, and Canvas Component Affected. Click a graph to view more information.
How do I view a report in the classic Field Admin Console?

Reports in the Field Admin Console allow you to view statistics pertaining to your institution including Canvas components reported by users, case creation, case escalation, case status, and requester role. Report information can be adjusted by related categories and time frame.

This lesson describes how to use the home page of the classic interface of the Field Admin Console. You can also use the new interface of the Field Admin Console.

Note: Currently, field admins can only view existing reports. If you would like to create a one-time custom report that is not included in the list, contact your Customer Success Manager to learn if this is possible.

Open Reports

From the Field Admin Console home page, click the Reports link [1] or the View Reports button [2].
Select Report

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canvas Component Affected by month</td>
<td>This report shows which issues, questions, and bugs your users reported most commonly in a given month or months.</td>
</tr>
<tr>
<td>Canvas Component Affected by week</td>
<td>This report shows which issues, questions, and bugs your users reported most commonly in a given week or weeks.</td>
</tr>
<tr>
<td>Case escalation by month</td>
<td>This report shows how many cases created in each month an institution has escalated to Instructure's Canvas Support.</td>
</tr>
<tr>
<td>Case escalation by week</td>
<td>This report shows how many cases created in each week an institution has escalated to Instructure's Canvas Support.</td>
</tr>
<tr>
<td>Cases by engineering ticket</td>
<td>This report is organized by Canvas engineering ticket (JIRA) and shows how many unsolved cases from your users are associated with each engineering ticket.</td>
</tr>
<tr>
<td>Cases by hour of day by day of week</td>
<td>Note that the values in this report (both the hour of the day and the day of the week) are displayed in UTC. Down the road, we'll deploy a new version of this report that detects and applies your own timezone.</td>
</tr>
<tr>
<td>Cases by origin by month</td>
<td>This report shows by which contact channels (phone, live chat, email, online submission) your users created cases in a given month or months.</td>
</tr>
<tr>
<td>Cases by origin by week</td>
<td>This report shows by which contact channels (phone, live chat, email, online submission) your users created cases in a given week or weeks.</td>
</tr>
<tr>
<td>Cases by requester role by month</td>
<td>This report shows the role (student, teacher, TA, etc.) of users who created cases in a given month. Note that only cases created through the Canvas help menu contain role info, also, the data is a bit clunky right now. Let's call this a start.</td>
</tr>
<tr>
<td>Cases by status by day</td>
<td>This report shows the current status of cases created each day in a range you can define yourself.</td>
</tr>
<tr>
<td>Cases by status by month</td>
<td>This report shows the current status of cases created each month in a range you can define yourself.</td>
</tr>
<tr>
<td>Cases by status by week</td>
<td>This report shows the current status of cases created each week in a range you can define yourself.</td>
</tr>
<tr>
<td>Cases created by month</td>
<td>This report shows how many cases your users created (total) by month.</td>
</tr>
<tr>
<td>Cases created by week</td>
<td>This report shows how many cases your users created (total) by week.</td>
</tr>
<tr>
<td>Master case report for field admins</td>
<td>Use this report if you'd like to dump a pile of data about every case in a given date range.</td>
</tr>
</tbody>
</table>

Click the name of the report you would like to view.
View Report

View your selected report information [1]. You can adjust the information visible in the report by changing Report Options [2] then clicking the Run Report button [3].
How do I view cases in the classic Field Admin Console?

As a field admin, you can read a case and view the status in the Field Admin Console. By default, the home page displays a list of new or open cases requiring your attention. You can also search for existing cases.

This lesson describes how to use the home page of the classic interface of the Field Admin Console. You can also use the new interface of the Field Admin Console.

Open Case

On the home page, click a case number.

On the home page, click case number 01582260.
Search for a Case

To search for a case or user, enter the case number or user into the **Search Cases and Users...** field [1] and click the **Search** button [2].

View Case

When you open a case, you will see three main sections:

- Metadata Panel (Case Detail) [1]
- Summary Panel [2]
- Detail/Feed Panels [3]
View Metadata Panel

The Metadata Panel allows you to view and change details on a case.

The **User's Name** and **User's Email** fields [1] list the name and email of the user who submitted the case. The **Case CC** field [2] will display anyone copied on the case. To add someone, enter the user's email address in the field. Separate multiple email addresses with commas. The **Case Owner** field [3] is the user currently assigned the case. To change the case owner, use the **Transfer To drop-down menu**. The **Date/Time Opened** field [4] shows the date and time the case was opened.

To save any changes made to the case, click the **Save Case Details** button [5].

**Note:** If you are replying to a user and click the Save Case Details button, it will refresh the page and you will lose your post.

View Status and Case Origin

The **Status** field [1] of your ticket may be New, Open, Pending, On-hold, or Solved.

- **New** means the case is new and needs a reply.
- **Open** means the case is actively being worked on. A case can remain open for as long as necessary.
• **Pending** is a status used by the Canvas Support Team if they are waiting for the end user to provide additional information that will help them resolve the issue. A case can remain in pending status for as long as necessary.

• **On-hold** is a status used by the Canvas Support Team if the case is being addressed by another department. On-hold cases should have a corresponding Jira assigned to it.

• **Solved** means the case has been resolved.

To change the status, select a status from the drop-down menu and click the **Save Case Details** button.

The **Case Origin** field [2] should be populated; if not, choosing a case origin from the following list is optional:

- Chat
- Email
- In Person
- Mobile App
- Online Submission
- Phone

### View Canvas Component Fields

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Canvas Component Section</strong></td>
</tr>
<tr>
<td></td>
<td>---None---</td>
</tr>
<tr>
<td>2</td>
<td><strong>Canvas Component Affected</strong></td>
</tr>
<tr>
<td></td>
<td>---None---</td>
</tr>
<tr>
<td>3</td>
<td><strong>Canvas Component Action</strong></td>
</tr>
<tr>
<td></td>
<td>---None---</td>
</tr>
<tr>
<td>4</td>
<td><strong>Canvas Component Issue</strong></td>
</tr>
<tr>
<td></td>
<td>---None---</td>
</tr>
</tbody>
</table>

Canvas Component fields describes which area in Canvas is involved with a case and what is occurring in that area.

- **The Canvas Component Section** field [1] describes whether the case relates to an entire account, a specific course, a Canvas user, an LTI or integration, or a non-Canvas issue.
- **The Canvas Component Affected** field [2] describes the feature in Canvas where the bug or issue comes from.
- **The Canvas Component Action** field [3] describes the action that led to the case creation.
- **The Canvas Component Issue** field [4] describes the purpose behind the case creation.
To learn more about options available for the Canvas Components fields, view the Canvas Components PDF.

**Note:** If there are secondary or tertiary level items, please select those items within that feature. If there are not, please select the main feature.

**View Subject, Description, and JIRA Issue Number**

The **Subject** field [1] shows what the end-user typed in the subject line. The **Description** field [2] shows what the end-user typed in the case.

The **JIRA Issue Number** field [3] is for Canvas support agents to fill in when a given case is associated with a ticket in our engineering ticketing system. If a cloud case is associated with a Canvas engineering ticket, the JIRA number will be shown here.

**View User ID, URL, and Become User URL**

The **User ID** field [1]

The **URL** field [2]

The **Become User URL** field [3]
The **User ID** field [1] lists the Canvas ID for the ticket submitter. This number should not be confused with an SIS ID.

The **URL** field [2] shows where the user was when the online submission ticket was created. Encourage your end users to click the Help link from the page in Canvas where they are experiencing the problem.

The **Become User URL** field [3] shows the page where the user submitted the ticket. This URL also allows you to see what the end user sees in Canvas.

**Note**: These fields will either be populated or not when the case is created. If they are not populated, you do not need to fill the fields out.

### View HTTP Environment and Stacktrace

![HTTP Environment and Stacktrace](image)

The User Agent String displayed in the **HTTP Environment** field [1] indicates the end user’s operating system, browser version, and IP address where it was submitted. To interpret this string, visit the [user agent string website](website) and paste the text in the window for analysis.

The **Stacktrace** field [2] contains the engineering error message. This field will be filled out if the ticket was submitted from a Page Error report. This message is usually only decipherable by the engineer who wrote the code but may contain some information that will lead you on the right path toward resolution.

**Note**: These fields will either be populated or not when the case is created. If they are not populated, you do not need to fill them out.

### View Summary Panel

<table>
<thead>
<tr>
<th>Customer</th>
<th>Assignment Submission</th>
<th>Status</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andy Admin</td>
<td>After multiple attempts, I have been unable to submit my PDF to complete Unit 1 Assignment in Biology 101.</td>
<td>Priority</td>
<td>Normal</td>
</tr>
<tr>
<td>Documentation</td>
<td></td>
<td>Case Owner</td>
<td>Andy Admin</td>
</tr>
</tbody>
</table>
The **Summary Panel** gives you a quick look at some of the information regarding the case, including the case's priority level. The following options are available for priority level:

- **Low**: Issues that aren't time sensitive.
- **Normal**: Run-of-the-mill issues, to be handled in order received.
- **High**: Impacts more than one user; is fairly time sensitive.
- **Urgent**: Impacts full departments or institution; extremely time sensitive.

### View Feed Panel

To access the Feed panel, click the **Feed** button [1]. At the top of the Feed View, there are options to share a post, escalate a case, attach a file, add a CC, or merge cases [2]. The lower part of the feed includes comments, posts about status changes, and posts about other metadata changes [3].

**Note:** Cases sometimes will have conversations that have already happened between the end user and Local Support Staff from their institution. If this is the case, the exchange will be scrollable with the newest replies at the top. It’s best to start at the bottom and move up from there.
View Details Panel

To access the Details panel, click the Details button [1]. The Detail panel includes the case metadata in a different format and case action buttons that are duplicated in the left-hand sidebar.

The Case Routing Number (CRN) [2] indicates a case's routing history. Learn more about the CRN in the Case Routing Number PDF.

The Account Name [3] will have the institution the user is associated with.

User Perceived Severity [4] is separate from the priority drop-down menu that the agent marks the ticket with. This helps track how urgent the issue is from the perspective of the end user. Users should reserve the Extreme Critical Emergency item for issues and bugs that really are critical emergencies.
How do I create a new case in the classic Field Admin Console?

You can create new cases in the Field Admin Console from the home page. This lesson describes how to use the home page of the classic interface of the Field Admin Console. You can also use the new interface of the Field Admin Console.

Create New Case

From the home page, click the Create New Case button.
Create Case Details

In the **Subject** field [1], create a subject for your case.

In the **Describe the issue** field [2], describe the problem you are experiencing in Canvas. Please be as detailed as possible to help troubleshoot the problem.

In the **How is this affecting you?** drop-down menu [3], select the statement that best describes how the problem is affecting you:

- Just a casual question, comment, idea, suggestion...
- I need some help but it’s not urgent.
- Something’s broken but I can work around it to get what I need done.
- I can’t get things done until I hear back from you.
- EXTREMELY CRITICAL EMERGENCY!!

To escalate the case directly to Canvas Support, click the **Escalate directly to Canvas Support upon creation** checkbox [4].
Create Case

Click the Create Case button.
How do I transfer a case to another field admin in the classic Field Admin Console?

If you have more than one field admin at your organization, you can assign cases to other field admins. This lesson describes how to use the home page of the classic interface of the Field Admin Console. You can also use the new interface of the Field Admin Console.

Open Case

To open a case, click the Case Number link.
Transfer Case

In the **Transfer To** drop-down menu [1], select the field admin you want to receive the case [2].

**Save Case Details**

Click the **Save Case Details** button.
How do I escalate a case to Canvas Support in the classic Field Admin Console?

If necessary, you may be able to escalate a case to the Canvas support team.

This lesson describes how to use the home page of the classic interface of the Field Admin Console. You can also use the new interface of the Field Admin Console.

Note: Before escalating a case, try troubleshooting the issue or searching for the answer yourself. Try using the community forums or Canvas Guides.

Follow these steps before you escalate a case:

1. Define the expected behavior and why this is a bug for you or your user.
2. Summarize all the parts and pieces of the issue - create a numbered list if that is helpful for you.
3. Answer these questions: How many users does this affect? Is it only experienced in certain situations, or all the time?
4. Try to replicate the issue from the user report or describe your attempts to replicate the problem.
5. Make sure that the problem exists on another browser or on another computer. Note those browsers in the case.
6. Include a link (Canvas URL) to the course or the page the problem is happening on.
7. Include a screencast or screenshot if possible as an attachment to the case. The more information you provide the Canvas Support Team, the better.
View Cases

To escalate a case, view the New Cases tab.

Open Case

To open a case, click the Case Number link.

Escalate Case

Click the Escalate button.
Note: Before escalating the case, make sure the case status is set to New, New - External or Open, Open - External.

**Update Case**

Select the **Escalate to Instructure** checkbox [1] and then click the **Update** button [2].
How do I share a post on a case in the classic Field Admin Console?

Posts can be made on individual cases to share information on case progress. Your post will appear in the feed of anyone following you or the case where the post was created. Any user with sharing rights will see your post on the case page, search results, and your profile.

This lesson describes how to use the home page of the classic interface of the Field Admin Console. You can also use the new interface of the Field Admin Console.

Open Case

From the home page, click the name of the case where you would like to share your post.
Create Post

To create a post, type in the text field.

Share Post

To share your post, click the Share button.
View Post

Click here to expand the Post action.

Andy Admin
I've reviewed this case and will contact the student to determine a resolution.

View your post.
How do I mark a case as solved in the classic Field Admin Console?

Once a case has been completed in the Field Admin Console, it can be marked as solved. Once it is marked as solved, it will appear under the Solved Cases tab in the home page.

This lesson describes how to use the home page of the classic interface of the Field Admin Console. You can also use the new interface of the Field Admin Console.

Open Case

From the home page, click the Case Number link to the case you would like to open.
Mark Case as Solved

In the Case Detail tab, locate the **Status** menu [1] and select **Solved** [2]. Make sure you respond to the user with a solution if you change the status to Solved.

Save Case Details

Click the **Save Case Details** button.
How do I use macros in the classic Field Admin Console?

Macros allow users to make a set of changes to a case with the single push of a button. These changes include transferring a case to a specific user, case status, Canvas Component Affected, Canvas Component Issue, and case comments. Macros can be used to **make changes to a single case** or **make mass case updates** in the Field Admin Console. You can create, edit, clone, and delete macros.

This lesson describes how to use the home page of the classic interface of the Field Admin Console. You can also use the **new interface of the Field Admin Console**.

Open Macros

From the home page, click the **Macros** tab.
View Macros

On the Macros page, you can create a new macro [1] or view existing macros [2].
Create Macro

Use the fields at the top of the Macros page to create a new macro.

Name Macro

In the Name field, type the name of your macro.
Select Macro Settings

Create the settings for your macro. The following settings are available:

- **Transfer To [1]**: Transfer cases to a specific user
- **Status [2]**: Set cases to a specific status
- **Canvas Component Section [3]**: Set Canvas Component Section for all cases
- **Canvas Component Affected [4]**: Set Canvas Component Affected for all cases
- **Canvas Component Action [5]**: Set Canvas Component Action for all cases
- **Canvas Component Issue [6]**: Set Canvas Component Issue for all cases
- **Chatter Comment [7]**: Leave a comment on all cases

To learn more about Canvas Components, view the Canvas Components PDF.

**Note**: None of the fields are required but you must provide a value for at least one to save your macro.

**Save Macro**

Click the **Save Macro** button.
View Macros

The table at the bottom of the Macros page displays all existing macros for your institution. To edit an existing macro, click the Edit link [1]. To make a copy of an existing macro, click the Clone link [2]. To delete an existing macro, click the Del link [3].

Note: Only the user who created a macro is allowed to edit or delete that macro.
How do I make a mass update to cases in the classic Field Admin Console?

The Mass Update button allows you to update up to 200 cases at once in the Service Cloud Admin Console. Through this update, you can assign ownership (via the Transfer To field), set the status and Canvas Component fields, and add comments.

Macros can also be applied to individual cases.

Open Cases Tab

From the Service Cloud home page, open the tab that includes the cases you want to update.
Select Cases

To manually select the cases you would like to update, click the checkbox next to the case number [1]. To select all the cases on the page, click the checkbox above the case numbers [2].

Click Mass Update

Click the Mass Update button.
Select Mass Update Settings

Select the settings for your mass update. You can apply the settings of an existing macro [1] or manually select your settings [2].

Apply Macro

To apply the setting of an existing macro, select your macro [1] and click the Apply Macro button [2].
Manually Select Settings

To manually select your mass update settings, choose from the following options:

- **Transfer To** [1]: Transfer cases to a specific user
- **Status** [2]: Set cases to a specific status
- **Canvas Component Section** [3]: Set Canvas Component Section for all cases
- **Canvas Component Affected** [4]: Set Canvas Component Affected for all cases
- **Canvas Component Action** [5]: Set Canvas Component Action for all cases
- **Canvas Component Issue** [6]: Set Canvas Component Issue for all cases
- **Chatter Comment** [7]: Leave comment on all cases

To learn more about Canvas Components, view the Service Cloud Canvas Components PDF.

**Note**: None of these fields are required, but you must provide a value for at least one to save your changes.
Save Changes

Click the Save changes button.
How do I apply a macro to a case in the classic Field Admin Console?

Macros allow you to save a set of case settings and apply them to cases in the Field Admin Console. These changes include transferring a case to a specific user, case status, Canvas Component Affected, Canvas Component Issue, and case comments.

To apply a macro to multiple cases, use the Mass Update feature.

This lesson describes how to use the home page of the classic interface of the Field Admin Console. You can also use the new interface of the Field Admin Console.

Open Case

From the Service Cloud home page, open a case by clicking the case number.
Select Macro

Under the Case Detail tab, select the macro you want to use.

Apply Macro

Click the Apply Macro button.
Field Admin Console - New Interface
How do I log in to the Field Cloud Admin Console?

If you are an admin with the correct permissions, you can log in to the Field Admin Console and view support tickets for your institution. The Field Admin Console can be viewed through one of two options: the classic interface, accessed through cases.canvaslms.com, and the new interface, accessed through adminconsole.canvaslms.com.

Note: If you see login errors:

- You may need to open cases.canvaslms.com or adminconsole.canvaslms.com in the same browser window where you are logged into Canvas.
- You may be logged into the wrong Canvas account. Check your URL and try again.
- You may be logged into Canvas as the wrong user. Log out of Canvas and log in as the correct user.
- You may not be setup as a Field Admin. Contact your Customer Success Manager.

Log in to Canvas

Using your institution's Canvas URL, enter your Canvas credentials and log in to your account.
Open Classic Interface

In a new browser window or tab, enter cases.canvaslms.com in the URL field.

Select Account

If you have an account with more than one Canvas URL, you may be asked to select the account that you want to use to log in.
View Classic Interface

View the classic interface of the Field Admin Console for your account. Learn how to view the Dashboard.

Open New Interface

In a new browser window or tab, enter adminconsole.canvaslms.com in the URL field.
Select Account

Oops, I couldn't log you in automatically.

Which Canvas account would you like to use to log in to Service Cloud?

- documentation.beta.instructure.com
- documentation.instructure.com
- other

If you have an account with more than one Canvas URL, you may be asked to select the account that you want to use to log in.

View New Interface

View the new interface of the Field Admin Console for your account. Learn how to use the new Field Admin Console.
What are the different case roles in the Field Admin Console?

The Field Admin Console includes five common case roles: Requester, Owner, Contact, CC, and Case Team. Modifications for Requester and CC roles are detailed in this lesson. Modifications for Owner, Contact, and Case Team can be found in the Field Admin customization lesson.

Requester

The Requester is the individual who first reports an issue and requires assistance. Under the Case Details tab, the Requester’s information can be found under User’s Name [1] and User’s Email [2].

Requesters can be modified by updating the Web Email field of a case [3].

Note: If a case is created without a value in the Web Email field, the email address displays as replace.me@example.com. This address indicates that the field should be updated as soon as possible.
Owner

The Owner is the individual who has responsibility for the case. Owners can transfer cases to other Field Admins or escalate them to the Instructure Support Team.

Contact

The Contact is the individual who facilitates communication with the Requester. In cases where the Field Admin is set as Owner, they hold both Owner and Contact roles. If that case is escalated to Instructure, the support agent is the Owner, but the Field Admin remains as the Contact. This arrangement allows the Field Admin to actively participate in the case while it is in the hands of the Support Team.
CC (Carbon Copy)

Carbon Copy (CC) is an individual who is added to a case to receive notifications on the progress of a specific case. Multiple individuals can be added as a CC but must be added on a case-by-case basis. CCs can be added to a case using the Add CC field within a case.

Notes:
- The email support@instructure.com cannot be added as a CC to a case.
- If a case is created via email, anyone placed as a CC on the original email will be automatically added as a CC on the case.

Case Team

The Case Team includes Account contacts and Field Admins who will receive notifications for all cases within an account.
What options can be customized for field admins in the Field Admin Console?

The Field Admin Console allows some options to be customized for the Field Admin role including user type, case routing, and notifications. However, these options are not currently visible to Field Admins.

This lesson shows what customization options in each area look like when they are enabled in Salesforce. If you are interested in enabling an option or have additional questions, please contact your Customer Success Manager (CSM) or submit a Salesforce help request.

User Type Options

User type options define specific options for users within an account. Learn more about case roles.

Active User

The Active option designates the Field Admin has access to the Field Admin Interface.

Dedicated Field Admin

The Dedicated option designates the dedicated Field Admin for the account.

Note: There should only be one dedicated Field Admin for each account.

Exempt From Routing

The Exempt From Routing option removes a Field Admin from being considered from both Case Owner and Case Contact roles.
Role Based Routing

The Role Based Routing option has two values: Student and Faculty. These values are used with the By User Role routing option under the Multiple Field Admin Assignment setting.

Non-Canvas Tier 1 Assignee

The Non-Canvas Tier 1 Assignee option designates admins who should be assigned non-Canvas cases for Tier 1 clients.

Non-User Email

The Non-User Email option treats submissions created by a person without access to the console as if submitted by a Field Admin.

Tier 1 Contact

The Tier 1 Contact options set the user as the contact for all cases created by faculty and/or students.
Case Routing Options

Case routing options can be adjusted to determine how cases are routed to Field Admins.

Always Escalate FA Cases

The **Always Escalate FA Cases** option escalates cases created by a Field Admin directly to the Instructure Support Team.

**Note:** This option is checked by default.

Case Routing

The **Case Routing** option can be set to Default [1] or Single Canvas by Sub-Account [2].

The Default option assigns all non-tier 1 cases according to the Multiple Field Admin Assignment selection. At least one active Field Admin must be associated with the account.

The Single Canvas by Sub-Account option is for Canvas instances with multiple support teams. This option requires at least one active Field Admin per support team and Support Settings records for every Canvas sub-account.

**Note:** The Single Canvas by Sub-Account option is not available for all accounts. Contact your CSM for more information on availability for your institution.

Language for Support

The **Language for Support** option allows selecting **English** or **Spanish** as the language for support.
The **Language for Support** option designates which support language team will receive case escalations. If no value is set, the default is English.

**Multiple Field Admin Assignment**

The **Multiple Field Admin Assignment** option has four choices: None, Dedicated, Round Robin, and By User Role.

**Note:** If the Multiple Field Admin Assignment is set to None, the default method will be Round Robin.

**Dedicated**

The **Dedicated** option routes each case to the assigned dedicated Field Admin for the account.

**Round Robin**

The **Round Robin** option rotates through all available Field Admins and assign cases to the Admin that has gone the longest without being assigned a case.
By User Role

The **By User Role** option allows for Round Robin style routing to two different groups of Field Admins, Faculty, and Student. At least one admin must be declared available for each role. A Field Admin may be listed under both roles.

Notification Options

The notification options define which notifications are sent and who will receive them through a case's life cycle.

Auto-Response Opt-Outs

The **Auto-Response Opt-Outs** option controls Notifications for case creation and idle response.

Case Comment Notification Opt-Outs

The **Case Comment Notification Opt-Outs** option controls which members of a case receive notifications when a new comment is added to a case.
Solved Opt-Outs

The Solved Opt-Outs option controls notifications when the case is marked as solved.

Case Survey Opt-Out

The Case Survey Opt-Out option controls whether a survey is sent after a case is marked solved.
How do I use the new Field Admin Console?

Once you have logged in, you can use the new Field Admin Console to effectively manage cases and customer knowledge bases (KBs) for your accounts. You can also edit your profile information.

Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

View Field Admin Console

The Field Admin Console opens to the home page. From the home page, you can view cases assigned to you in the My Cases table [1]. To view an individual case, click the case number [2].

To create a new case, click the Create New Case button [3].

The Home page also displays outstanding knowledge base (KB) update requests in the KB Update Requests list [4].

To search the interface, enter your search terms in the field and click the Search button [5].

To return to the classic interface, click the Classic Interface link [6].

To view the Canvas Guides, click the Canvas Guides link [7].
Open User Menu

To open your User Menu, click your username.

View User Menu

From the User Menu, you can:

- Return to the home page [1]
- View your profile [2]
- Manage settings [3]
- View your account [4]
- Create a new case [5]
- Logout of the console [6]

**View Profile**

From your profile, you can view and edit profile information, including name, email, title, department, and contact information. To edit your profile, click the **Edit** button [1].

To edit your profile picture, click the **Photo** icon [2].
View Settings

From the Settings page, you can manage your password, language, timezone, locale and profile visibility.

To change your password, click the Change Password link [1].

To change your language, click the Language field [2]. To change your timezone, click the Timezone field [3]. To change your locale, click the Locale field [4].

In the Profile Visibility settings [5], you can manage who is able to see the information on your profile page. To customize visibility, click the drop-down menu that corresponds to your profile information [6]. Then select if the information is public, restricted to users who are logged in, or limited to members who created an account.
View Cases

To view your cases, click the **Cases** tab [1]. From the Cases page, you can manage cases in your account.

To **view an individual case**, click the case number [2].

**View Macros**
To view your account macros, click the **Macros** tab [1]. Macros allow field admins to create a list of changes that can be applied to cases in a single click.

To create a new macro, click the **New** button [2].

**View Accounts**

To view your accounts, click the **Accounts** tab [1]. By default, the Accounts page will display all accounts that you are authorized to view. To filter the accounts that display on the page, click the **Filter** icon [2]. To pin an account filter as the default view, click the **Pin** icon [3].

To view information for an account, click the name of the account [6].
View Customer KBs

To view customer KBs for your accounts, click the Customer KB tab.
View Reports

To view your Case Dashboard and reports, click the **Case Dashboard & Reports** tab [1].

From the Case Dashboard, you can view donut charts for case origin [2], case role [3], case status [4], Canvas component affected [5], associated JIRA tickets [6], and escalated level [7].

To view detailed reports for a dashboard item, click the **View Report** link [8].
How do I view my customer KB in the new Field Admin Console?

As a field admin, you can view and edit your customer knowledge base (KB) from the new Field Admin Console. Customer KBs allow you to share institution-specific details that help agents assist users with support cases.

You can also create new KB entries.

Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Open Customer KBs

From the Field Admin Console home page, click the Customer KB tab.
Open Account KB

Knowledgebase documents are part of our Tier 1 Support service, where Canvas Support engineers work directly with students and teachers at your institution. KB documents tell our engineers how to help your users with school-specific issues. If your institution does not have Tier 1 Support, there's nothing to see here. If you'd like to move to Tier 1 Support, please contact your Customer Success Manager.

Click the name of the account that includes the KBs you want to view [1].

To filter the accounts that display on the page, click the Filter icon [2]. To pin an account filter, click the Pin icon [3].

To search for an account, type the name of the account in the Search field [4].

View KB Entries

KB Entries (5)

- I don't see all of my courses in Canvas (Student)
- I don't see all of my courses in Canvas (Faculty)
- I need to add a user from a Canvas site
- I can't log into Canvas.
- I can't change my email address

View All
View your KB entries.

To create a new KB entry, click the New button [1]. To view details for an entry, click the name of the entry [2].

**View Entry Details**

<table>
<thead>
<tr>
<th>Details</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Entry name</td>
<td>I don’t see all of my courses in Canvas (Faculty)</td>
</tr>
<tr>
<td>2. Affected roles</td>
<td>All</td>
</tr>
<tr>
<td>3. Default Case Handling</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Praesent nulla eros semper at placerat ac, eleifend quis risus. Morbi quis tincidunt risus. Morbi tortor est, imperdiet eu risus et, ullamcorper ut est et imperdiet. Quisque lacinia vitae velit metus elementum, a aliquet neque luctus. Aliquam sed odio</td>
</tr>
<tr>
<td>4. Update Request</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Direct the student to (555) 432-1234 (option 2) for assistance.</td>
</tr>
<tr>
<td>5. Update Request Date</td>
<td>5/15/2019 3:02 PM</td>
</tr>
<tr>
<td>6. Details Updated</td>
<td></td>
</tr>
<tr>
<td>7. System Information</td>
<td></td>
</tr>
<tr>
<td>Created by</td>
<td>Drunk Dog, 5/15/2019 3:02 PM</td>
</tr>
<tr>
<td>Last Modified by</td>
<td>Reginald Harrington, 5/21/2019 9:19 AM</td>
</tr>
</tbody>
</table>

Each KB entry contains the following details:

- Entry name [1]
- Affected roles [2]
- Default case handling [3]: provides additional details, text, and keywords that support agents can use when handling a case related to the entry
- Update request [4]: includes any details that should be added to the entry. When these updates are addressed, click the Details Updated checkbox [5].
- User who created the entry [6]
- User who last modified the entry [7]
Edit Entry

**KB Entry**
I don't see all of my courses in Canvas (Faculty)

<table>
<thead>
<tr>
<th>DETAILS</th>
<th>RELATED</th>
</tr>
</thead>
<tbody>
<tr>
<td>KB Entry Name</td>
<td>Roles</td>
</tr>
<tr>
<td>I don't see all of my courses in Canvas (Faculty)</td>
<td>All</td>
</tr>
</tbody>
</table>

To edit an entry field, click the **Edit** icon [1].

To edit an entire KB entry, click the **Edit** button [2]. To clone a KB entry, click the **Clone** button [3].

View KB Details
View the details for your customer KB, including alerts [1], contact information [2], prime directives [3], account terminology [4], case routing [5], and account information [6].

To edit the KB details, click the **Edit** icon [7].
How do I create a KB entry in the new Field Admin Console?

As a field admin, you can add a new entry to a customer knowledge base (KB). Customer KBs allow institutions to share institution-specific information with agents that accept support cases from their users.

**Note:** Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Open Customer KB

Click the Customer KB tab.

Open Account KB

Click the name of the account you want to view.
Open KB Entries

Click the KB Entries tab.

Create New Entry

To create a new entry, click the New button.
Enter Entry Details

New KB Entry

Information

1. KB Entry Name
2. Variance
3. Roles

Enter a name for the entry in **KB Entry Name** field [1].

To select a variance for the entry, click the **Variance** drop-down menu [2]. Variance describes how different the entry is from the normal workflow. Variance can be set to low, medium, high, or none.

To select which roles are involved with the entry, click the **Roles** drop-down menu [3]. Roles can be set to students, faculty, all, or none.
Enter Institution-Provided Scripting

To share additional details for the entry, enter the details in the Details field [1]. To provide support agents with a text script to read to clients, enter the script in the End User Script field [2].
Enter Additional Information

Default Handling

Key Words

System Information

* Customer KB

Canvas University

To add key words to an entry, enter the terms in the **Key Words** field [1].

To add the entry to a different account, click the **Remove** icon [2] and select a different account.

Save Entry

To save the KB entry, click the **Save** button [1]. To save the KB entry and create a new entry, click the **Save & New** button [2].

To delete the new entry, click the **Cancel** button [3].
How do I manage KB update requests in the new Field Admin Console?

Canvas support agents can request updates to an entry in your institution’s knowledge base (KB) through the new Field Admin Console. Update requests display on the Admin Console home page. You can view update requests, make changes, and remove the entry from your list of updates.

Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Open Update Request

KB update requests display in the KB Update Requests list [1]. To open an update request, click the name of the request [2]. To view all update requests, click the View All link [2].
View Update Request

KB update details display in the **Update Request** section [1].

The **Update Request** field [2] displays the update that Canvas Support suggests should be added to your institution's KB. The **Update Request Date** field [3] displays the date and time that the update request was made.
Edit KB Entry

KB updates can be made in the Default Case Handling section [1].

To edit your KB entry, click the Edit icon for any field [2].
Enter Case Handling Details

Enter updates to your KB entry in the Default Case Handling fields:

- **The Details for Canvas Support** field [1] displays any relevant information for how Canvas Support should handle related cases.
- **The Details for your users** field [2] displays a scripted response that support agents can use when responding to related cases.
- **The Key Words** field [3] displays any related terms or words that users might use when submitting a case related to the KB entry.

KB entry fields will display a highlighted border once any changes have been made. To undo edits, click the **Undo** icon [4].
Save Changes

To remove the KB entry from the KB Update Requests list on the home page, click the Details Updated checkbox [1].

To save your changes, click the Save button [2].

Notes:

- Checking the Details Updated checkbox and saving your changes will also clear all content from the Update Requests fields.
- When viewing your KB, Canvas support agents will be able to view when the last change was made to the entry.
How do I view and manage cases in the new Field Admin Console?

As a field admin, you can view and manage cases using the Cases table. The Cases table will display all open cases in your account but can be filtered to display cases that meet specific criteria.

You can log in to the new Field Admin Console at adminconsole.canvaslms.com.

Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Open Cases

In the Field Admin Console home page, click the Cases tab.
View Cases

The Cases page displays the Cases table, which lists open cases from accounts you manage [1]. Each case displays a case number [2], subject [3], status [4], date of last modification [5], date and time the case was opened [6], user who created the case [7], and account name [8].

Filter Cases Table

To filter the Cases table, click the Filter menu [1]. You can filter cases by status, cases created today, cases assigned to you, recently viewed cases, or triaged cases.

To pin a filter as the default view for the Cases page, click the Pin icon [2].
View Case Tools

The Cases table includes several tools that allow you to manage your cases.

To search the Cases table, click the Search field [1].

If your account has configured Kanban view, you can toggle the table between list view and Kanban view by clicking the Display as button [2].

To refresh the table, click the Refresh button [3]. To edit a field, click the field and click the Edit button [4]. To view case charts, click the Charts button [5].

If your account allows you to manage advanced filtering, you can view additional filters by clicking the Filter button [6].

**Note:** The Search tool will not return results for case status, date/time modified, or date/time opened.

Open Case

To open a case, click the case number.
How do I create a case in the new Field Admin Console?

You can create a case from the Field Admin Console. New cases can be added to your list of open cases or escalated to Canvas Support.

Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Create New Case

In the Field Admin Console home page, click the Create New Case button.
Add Case Details

Enter a subject for the case in the **Subject** field [1] and a description in the **Description** field [2].

To define the severity for the user, click the **User Perceived Severity** drop-down menu [3]. You can select the following options:

- Just a casual question, comment, idea, suggestion...
- I need some help but it's not urgent.
- Something's broken but I can work around it to get what I need done.
- I can't get things done until I hear back from you.
- EXTREMELY CRITICAL EMERGENCY!!

To escalate the case to Instructure support, click the **Escalate to Instructure** checkbox [4].

**Note:** You should reserve the Extremely Critical Emergency option for issues and bugs that really are critical emergencies.
Add Attachment

Create New Case

Subject
User cannot change his email

Description
Jack Fountain is trying to change his Canvas email address from jaq@email.com to jack@email.com.

User Perceived Severity
I need some help but it's not urgent.

Escalate to Instructure

Upload File

Submit

To add an attachment to the case, click the Upload File link.
Select File

To upload a file from your computer, click the **Upload File** button [1]. To select previous files, click the **Owned by Me, Shared with Me, Recent, or Following** link [2].

To add the attachment, click the **Add** button [3].
Submit Case

Create New Case

Subject
User cannot change his email

Description
Jack Fountain is trying to change his Canvas email address from jaq@email.com to jack@email.com.

User Perceived Severity
I need some help but it's not urgent.

Escalate to Instructure

Upload File

To submit the case, click the Submit button.
View Case

Your case was created.
We'll get back to you soon.

Case summary

Subject: User cannot change his email

Description: Jack Fountain is trying to change his Canvas email address from jaq@email.com to jack@email.com.

Case Number: 04347791

View the case summary.

To view the full case details, click the case number.
How do I manage an individual case in the new Field Admin Console?

After you have opened a case from the Cases page, you can manage details for an individual case.

Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Open Case

The Field Admin Console home page displays all cases assigned to you in the My Cases table. To view a case, click the case number.

If you need to view a case that is not assigned to you, open the Cases page by clicking the Cases tab.
View the case. Each case displays important details at a glance [1], including case number, owner name, date/time opened, and support level.

To follow a case, click the Follow button [2]. To edit case details, click the Edit button [3].

To merge the case with another case, click the Merge Case button [4]. To change the owner of the case, click the Change Owner button [5].

To open the Canvas Guides, click the Guides tab [6].
To view the case activity feed and comments, click the Chatter tab [1].

To add a comment to the case, enter your comment in the Share an update field [2] and click the Share button [3].

To attach a comment to feed item, click the Comment link for the item [4]. To like a feed item, click the Like link [5].
Change Case Status

To change the case status, click the **Change Status** tab [1]. Then select the new status from the **Status** drop-down menu [2]. To save the status, click the **Save** button [3].

View Details Tab

- **Case Number**: 04330815
- **Case Owner**: Reginald Harrington
- **Subject**: Assistance with Conferences
- **Description**: How do I create a conference that is only available for certain students? Thanks!

- **Canvas**
- **Email Copies**
- **Additional Information**
- **Enter a New Public Comment**
- **Web Information**
To view case details, click the **Details** tab [1]. From the Details tab, you can view and edit information about a case.

To edit a field in the Case Details tab, click the **Edit** icon [2].

The **Case Number** field displays the case number [3]. The **Subject** field [4] displays what the end-user typed in the subject line. The **Description** field [5] displays what the end-user typed in the case.

The **Case Owner** field [6] displays the user currently assigned to the case [5]. To change the case owner, click the **Case Owner** icon [7].

### View Canvas Details

1. **Canvas**
2. **Status**
   - New
3. **Become User URL**
   - https://documentation.instructure.com/courses/367/conferences?become_user_id=170
4. **Canvas URL**
   - documentation.instructure.com
5. **Canvas Account ID**
   - 1
6. **Contact Name**
   - Reginald Harrington
7. **Canvas Component Section**
   - Core
8. **Canvas Component Affected**
   - Communications
9. **Canvas Component Action**
   - Access / View
10. **Canvas Component Issue**
    - "How to" Question
11. **Disability / Accessibility Related**
    - No

The **Canvas Details** section [1] displays Canvas-specific information about the case:

- **Status** [2]: displays the case status. Status can be set to open, new, pending, on hold, solved, or closed as duplicate.
- **Become User URL** [3]: displays the page where the user submitted the ticket. This URL also allows you to see what the end user sees in Canvas.
- **Canvas URL** [4]: displays Canvas instance from which case was submitted.
- **Canvas Account ID** [5]: displays Canvas account ID number.
- **Contact Name** [6]: displays the name of the individual who facilitates communication with the Requester.
- **Canvas Component Section** [7]: describes whether the case relates to an entire account, a specific course, a Canvas user, an LTI or integration, or a non-Canvas issue.
- **Canvas Component Affected** [8]: describes the feature in Canvas where the bug or issue comes from.
- **Canvas Component Action** [9]: describes the action that led to the case creation.
• **Canvas Component Issue** [10]: describes the purpose behind the case creation.

• **Disability/Accessibility Related** [11]: designates if the case relates to disability or accessibility concerns.

### Add Email Copies

The **Add CC** field contains any email address that will receive notifications for case updates.

### View Additional Information

The **Additional Information** section [1] displays additional information that relates to the case:
- **Case Origin** [2]: displays where the case originated, such as email, phone, or online submission.
- **Priority** [3]: describes the urgency with which the case should be addressed.
- **Transfer** [4]: allows users to transfer case to another field admin.
- **User Perceived Severity** [5]: displays how urgent the issue is from the perspective of the end user. Users should reserve the Extremely Critical Emergency option for issues and bugs that really are critical emergencies.
- **Account Name** [6]: displays the name of the account.
- **Web Email** [7]: displays the requester's email address.
- **Requester Name** [8]: displays the name of the user who created the case.
- **User ID** [9]: displays the requester's user ID.
- **Requester Role** [10]: displays the requester's role(s). To add or remove a role, click the role title and click the Arrow keys [11].

To disable notifications on the case, click the **Disable Notifications** checkbox [12].

**Add Comment**

To add a comment to the case, enter the comment in the **Public Comment** field [1].

The **Owner Name** field [2] displays the name of the case owner.
View Web Information

The **HTTP Environment** field [1] indicates the end user's operating system, browser version, and IP address. To interpret this string, visit the [user agent string website](#) and paste the text in the window for analysis.

The **Stacktrace** field [2] contains the engineering error message. This field will be filled out if the ticket was submitted from a Page Error report. This message is usually only decipherable by the engineer who wrote the code but may contain some information that will lead you on the right path toward resolution.
To escalate the case to Instructure Support, click the **Escalate** button.
Apply Macro

Macros allow you to apply preset changes to case. To apply a macro, click the Select Macro drop-down menu [1] and select the macro you want to apply [2]. Then click the Apply button [3].
How do I create a macro in the new Field Admin Console?

You can create a macro in the new Field Admin Console. Macros allow you to apply set changes to any case in a few clicks. You can apply a macro when you view an individual case.

Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Open Macros

To open the Macros page, click the Macros tab.

Create New Macro
To create a new macro, click the **New** button.

### Add Macro Details

<table>
<thead>
<tr>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
</tr>
<tr>
<td>New Case - Teacher Communication</td>
</tr>
<tr>
<td><strong>Account</strong></td>
</tr>
<tr>
<td>Canvas University</td>
</tr>
<tr>
<td><strong>Transfer</strong></td>
</tr>
<tr>
<td>Search Field Admin</td>
</tr>
<tr>
<td><strong>Status</strong></td>
</tr>
<tr>
<td>New</td>
</tr>
<tr>
<td><strong>Canvas Component Affected</strong></td>
</tr>
<tr>
<td><strong>Core</strong></td>
</tr>
<tr>
<td>Canvas Component Issue</td>
</tr>
<tr>
<td><strong>Communications</strong></td>
</tr>
<tr>
<td>Canvas Component Action</td>
</tr>
<tr>
<td><strong>Access/View</strong></td>
</tr>
<tr>
<td><strong>Canvas Component Section</strong></td>
</tr>
<tr>
<td><strong>’How to’ question</strong></td>
</tr>
<tr>
<td><strong>Chatter Comment</strong></td>
</tr>
</tbody>
</table>

This case relates to the students communicating with their teachers in classes with multiple sections.

Enter the details for the macro. Macro details include:

- **Name** [1]
- **Account** [2]: displays the account where macro can be used. To remove an account, click the Remove icon [3].
- **Transfer** [4]: transfers cases to designated field admin
- **Status** [5]: designates case status, which can be set to open, new, pending, on hold, solved, or closed as duplicate.
- **Canvas Component Section** [6]: describes whether the case relates to an entire account, a specific course, a Canvas user, an LTI or integration, or a non-Canvas issue.
- **Canvas Component Affected** [7]: describes the feature in Canvas where the bug or issue comes from.
- **Canvas Component Action** [8]: describes the action that led to the case creation.
- **Canvas Component Issue** [9]: describes the purpose behind the case creation.
- **Chatter Comment** [10]: adds comment to every case
Save Macro

To save your macro, click the **Save** button [1]. To save your macro and begin creating a new macro, click the **Save & New** button [2].

To delete your macro, click the **Cancel** button [3].

View Macro

View the macro.

To edit the macro, click the **Edit** button [1]. To delete your macro, click the **Delete** button [2]. To duplicate your macro, click the **Clone** button [3].
Global Navigation
How do I use the Global Navigation Menu as an admin?

The Global Navigation Menu is located on the left side of every page in Canvas. Global Navigation links provide quick access to frequently used Canvas features. As an admin, your default links include the User Account, Admin, Dashboard, Courses, Groups, Calendar, Inbox, and the Help menu.

Depending on your institution account settings, other links may appear in the Global Navigation Menu.

View Account

To view your user information, click the Account link. A menu will expand and display links to access your profile, user settings, notification preferences, personal files, and ePortfolios. You can also use the Account link to log out of Canvas.
If you are a Canvas admin, you can access your institution's Canvas accounts and sub-accounts in the Admin link [1]. A menu will expand and display a list of your accounts [2]. To view an account, click the name of the account [3]. To view all your managed accounts, click the All Accounts link [4].
View Dashboard

The Dashboard is a user's landing page after logging in to Canvas. The Dashboard settings can be changed to display course cards or a list of recent activity, including notifications for all current Canvas courses.
View Courses

To view your courses, click the **Courses** link [1]. A menu will expand and display any courses where you are enrolled [2].

This menu also displays any courses marked as favorites. If no courses are selected as favorites, the course list will display all current courses. If a course includes term dates, the name of the term will appear as part of the course listing.

If you have been added to any courses, view a course by clicking the name of the course. If your institution has enabled the Public Course Index, you can view all available courses by clicking the **All Courses** link [3].
If you are enrolled in any groups, view your groups in the Groups link [1]. A menu will expand and display all groups where you are enrolled. Most commonly, any groups where you are a member will exist as an account group.

To view a group, click the name of the group [2]. To view all your groups, click the All Groups link [3].

**Note:** Groups cannot be customized in the drop-down menu.
To view your Calendar, click the Calendar link. You can create events for your personal calendar and also view events for courses where you are added as a user, if any.
To view your Conversations Inbox, click the **Inbox** link. Conversations is the Canvas messaging system where you can communicate with other users in your account. The number of new messages are shown as part of the Inbox icon.
View Commons

If your institution is participating in Canvas Commons, you can access Commons with the Commons link.
View Help

To get help with Canvas, click the Help link [1]. The Help menu will appear [2]. Select the help option that is relevant to your needs. You can customize the Help menu for your institution.

**Note:** Depending on your user role and institution settings, the Help menu may display different options.
Collapse Global Navigation Menu

To expand or collapse the Global Navigation menu, click the arrow icon.

The Global Navigation Menu will be automatically collapsed for tablet screens.
How do I view my institution's Public Course Index as an admin?

The Public Course Index allows all users within an institution to publicly view the institution's course index in a catalog format. You can view a link to the Public Course Index on the My Courses page.

**Note:** The Public Course Index is currently an account opt-in feature. Learn how to manage feature options.

Open Courses

In Global Navigation, click the **Courses** link [1], then click the **All Courses** link [2].
Browse More Courses

In the My Courses page sidebar, click the Browse More Courses link.

View All Courses

You can view all courses that have been included in the public course index, with the most recently created courses shown first. You can view the name of the course [1] and a description, if any [2].
Search Courses

You can search for courses in several different ways. In the Name field [1], you can type the name of a course.

You can also search for courses by status. If you want to view only public courses, click the Public courses only checkbox [2]. If you want to view only open enrollment courses, click the Open enrollment courses only checkbox [3]. Open enrollment courses are courses that you can join at any time.

When you are finished selecting your search options, click the Search button [4].
View Course

To view a course, click the name of the course [1]. If a course lets students self-enroll, you can join the course at any time by clicking the **Join this Course** button [2]. However, you can view the course first and enroll in the course home page.
Grading
How do I view grading schemes in an account?

You can view your account's grading schemes, including grading schemes you have created for your account. You can also edit and delete grading schemes if necessary.

Any grading schemes created in your account will also display in sub-accounts.

Open Grading

In Account Navigation, click the Grading link.

Open Grading Schemes

Grading

| Grading Periods | Grading Schemes |
If Multiple Grading Periods is enabled for your institution, click the Grading Schemes tab.

**View Grading Schemes**

<table>
<thead>
<tr>
<th>GPA Scale</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.0</td>
<td>100%  to 93%</td>
</tr>
<tr>
<td>3.7</td>
<td>&lt; 93% to 90%</td>
</tr>
<tr>
<td>3.3</td>
<td>&lt; 90% to 87%</td>
</tr>
<tr>
<td>3.0</td>
<td>&lt; 87% to 83%</td>
</tr>
<tr>
<td>2.7</td>
<td>&lt; 83% to 80%</td>
</tr>
<tr>
<td>2.3</td>
<td>&lt; 80% to 77%</td>
</tr>
<tr>
<td>2.0</td>
<td>&lt; 77% to 73%</td>
</tr>
<tr>
<td>1.7</td>
<td>&lt; 73% to 70%</td>
</tr>
<tr>
<td>1.3</td>
<td>&lt; 70% to 67%</td>
</tr>
<tr>
<td>1.0</td>
<td>&lt; 67% to 65%</td>
</tr>
<tr>
<td>0</td>
<td>&lt; 65% to 0%</td>
</tr>
</tbody>
</table>

The Grading Schemes page shows all grading schemes for your account.

**Add Grading Scheme**

To add an account grading scheme, click the Add Grading Scheme button.
## Manage Grading Schemes

<table>
<thead>
<tr>
<th>Performance</th>
<th>Name</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Excellent</td>
<td>100%</td>
</tr>
<tr>
<td></td>
<td>Good</td>
<td>&lt; 90%</td>
</tr>
<tr>
<td></td>
<td>Fair</td>
<td>&lt; 80%</td>
</tr>
<tr>
<td></td>
<td>Poor</td>
<td>&lt; 70%</td>
</tr>
<tr>
<td></td>
<td>Fail</td>
<td>&lt; 60%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>to 90%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>to 80%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>to 70%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>to 60%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>to 0%</td>
</tr>
</tbody>
</table>

To edit a grading scheme, click the **Edit** icon [1].

To delete a grading scheme, click the **Delete** icon [2].

**Notes:**

- You can only edit grading schemes that have not been linked to a course. However, grading schemes can always be deleted.
- If you delete an account-level grading scheme that has been enabled at the course level and used to assess a student, the grading scheme will not be deleted from the course.
How do I add a grading scheme in an account?

As an admin, you can create grading schemes for all accounts associated with your account.

Once a grading scheme is created for your account, instructors can link the grading scheme to their courses. However, once a grading scheme has been used to assess a student, you cannot edit the grading scheme.

Note: Any grading schemes you create in an account will also display within sub-accounts.

Open Grading

In Account Navigation, click the Grading link.
Open Grading Schemes

If Multiple Grading Periods is enabled for your institution, click the **Grading Schemes** tab.

Add Grading Scheme

Click the **Add Grading Scheme** button.
## Edit Grading Scheme

Create a title in the Scheme Name field [1]. For each line item, edit the grading scheme name in the name field [2]. Edit the minimum end of each individual range in the To [Number] % field [3].

| Name   | Range   | To | | | | | | |
|--------|---------|----|---|---|---|---|---|---|---|
| Excellent | 100%   | to 90 |  |  |  |  |  |  |  |
| Good    | < 90%   | to 80 |  |  |  |  |  |  |  |
| Fair    | < 80%   | to 70 |  |  |  |  |  |  |  |
| Poor    | < 70%   | to 60 |  |  |  |  |  |  |  |
| Fail    | < 60%   | to 0  |  |  |  |  |  |  |  |
Add Range

If you need to add ranges, click the Add icon [1] to the left of any range checkbox. You can remove individual ranges by clicking the Remove icon [2]. When you are finished editing your grading scheme, click the Save button [3].

Save Scheme

Click the Save button.
Modify Grading Scheme

<table>
<thead>
<tr>
<th>Performance</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>100% to 90%</td>
</tr>
<tr>
<td>Good</td>
<td>&lt; 90% to 80%</td>
</tr>
<tr>
<td>Fair</td>
<td>&lt; 80% to 70%</td>
</tr>
<tr>
<td>Poor</td>
<td>&lt; 70% to 60%</td>
</tr>
<tr>
<td>Fail</td>
<td>&lt; 60% to 0%</td>
</tr>
</tbody>
</table>

Your new grading scheme will appear underneath any previously used grading schemes. If you are able to edit the grading scheme, you can edit the scheme by clicking the Edit icon [1]. To delete a grading scheme, click the Delete icon [2].

Notes:

- You can only edit grading schemes that have not been linked to a course. However, grading schemes can always be deleted.
- If you delete an account-level grading scheme that has been enabled at the course level and used to assess a student, the grading scheme will not be deleted from the course.
How do I view grading periods in an account?

As an admin, you can manage grading periods for your institution. Each grading period set applies to the entire institution, including subaccounts. All courses associated with a term in a grading period automatically inherit the term’s grading periods.

As grading periods do not directly affect any course assignments, grading periods can be deleted or their start and end dates can be changed. However, changes should generally be made before a term begins. Changing grading period dates during a term will affect grade totals.

Open Grading

Permissions
Outcomes
Rubrics
Grading
Question Banks
Sub-Accounts
Terms
Authentication

In Account Navigation, click the Grading link.
Open Grading Periods

Click the Grading Periods tab.

Filter Grading Period Sets

Grading periods can be filtered by viewing a term in the Terms drop-down menu [1], or by searching for the name of a term or grading period in the search field [2].

View Grading Period Sets

The Grading Periods account-level tab displays all grading period sets and their grading periods.

Each grading period set shows the name of the grading period set [1] and the associated terms [2].
Manage Grading Period Sets

To edit the name or term(s) for a grading period set, click the Edit icon [1]. To delete the grading period set, click the Delete icon [2].

Add Grading Period Set

To add a new grading period set, click the Add Set of Grading Periods button.

To add a new grading period set, click the Add Set of Grading Periods button.
View Grading Periods

<table>
<thead>
<tr>
<th>Grade Period</th>
<th>Start Date</th>
<th>End Date</th>
<th>Close Date</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2017</td>
<td>Apr 30, 2017</td>
<td>Sep 3, 2017</td>
<td>Sep 10, 2017</td>
<td>50%</td>
</tr>
<tr>
<td>Fall 2017</td>
<td>Sep 3, 2017</td>
<td>Dec 31, 2017</td>
<td>Dec 31, 2017</td>
<td>50%</td>
</tr>
</tbody>
</table>

To view a grading period, expand the grading period set by clicking the arrow next to the set name [1].

Each grading period shows the name of the grading period [2], the start date [3], the end date [4], and the close date [5].

If your grading periods are weighted, you can view each grading period’s weighted percentage [6]. The percentages for the entire grading period set can total any number and does not have to add up to 100%.

**Note:** Beneath the date fields, Canvas will display the time zone date and time according to context. If you manage an account in a time zone other than your local time zone, the account and local times are displayed for reference.
Manage Grading Periods

To edit dates for a grading period, click the **Edit** icon [1]. To delete a grading period, click the **Delete** icon [2].

To add another grading period, click the **Add Grading Period** link [3].
View Concluded Grading Periods

Once a grading period has concluded, existing grading period sets should never be edited and reused for future terms. Future terms should be added to a new grading period set, with dates defined specifically for the future term. As term dates most commonly last an entire year, new grading period sets should only have to be created annually.

Retaining concluded terms and their associated grading periods ensures accuracy in grading reports.
How do I add grading periods in an account?

You can create new grading periods for all courses within your institution. Grading periods can only be created at the account level.

Concluded grading periods should never be edited and reused for future terms. Future terms should be added to a new grading period set, with dates defined specifically for the future term. Retaining concluded terms and their associated grading periods ensures accuracy in grading reports.

Grading Periods

Grading periods are created within a grading period set and associated with a term. All courses associated with the term automatically inherit the grading periods created for the term. Each term can only be associated with one grading period set, but multiple terms can be in the same grading period set. Multiple terms can be added to a grading set if the courses in the terms use the same grading periods. Grading periods can be added to the grading period set in any order and are organized by start date. Start and end dates cannot overlap in a grading period.

Grading periods can also be weighted. When this option is enabled, the overall grade for each term is calculated by taking the final grades for each grading period and applying each grading period’s weight.

In the course grading scheme, instructors can view the grading periods associated with the course term.

Close Dates

You can also add a close date to grading periods, which allows you to extend the time that instructors can edit grades after the grading period has ended. By default, the close date is the same as the end date. However, the close date can be edited to any date after the end date.

At the course level, Canvas validates assignments against closed grading periods in Canvas. Currently, Canvas only validates assignments against closed grading periods in the Gradebook and SpeedGrader. Other feature areas will be validated in upcoming releases. For current limitations associated with the close date feature, please view the Close Dates for Grading Periods document in the Canvas Community.

Multiple Terms and Grading Periods

If your institution requires different grading periods to be active at the same time, you can create additional terms and add them to a new or current grading period set. For instance, if your district needs grading periods for both semesters and quarters, you can create a new term for each school and place the terms within different grading period sets—one created for semesters and one created for quarters. In the Terms page, each term will display its associated grading period.

All courses in a term are associated with the grading period. If your institution requires some courses in a term to not be associated with a grading period, you must create a separate term for those courses that is not associated with a grading period.

Notes:
Once a term is associated with a grading period, the name of the grading period displays with the term in the Terms page.

Sub-accounts and courses display grading periods in a read-only state; changes can only be made at the account level.

Open Grading

Permissions
Outcomes
Rubrics
Grading
Question Banks
Sub-Accounts
Terms
Authentication

In Account Navigation, click the Grading link.

Add Set of Grading Periods

Click the Add Set of Grading Periods button.
Create Set Name

In the Set Name field, enter a name for the grading period set.

Attach Terms

If you want to attach an existing term to the grading period set, click the Attach Terms field. In the drop-down list, select the term(s) you want to associate with the grading period set. Terms are sorted by date; once a term is selected, the term is removed from the drop-down list. Terms can only be associated with one grading period set.

You can edit a grading period set and add a term at any time.
Set Grading Period Options

You can also choose to set two options for the grading period.

If you want to create each grading period with an individual weight, click the Weighted grading periods check box [1].

When users view the All Grading Periods option in the grading periods drop-down menu, you can allow them to view total grades and any assignment group totals in the course by clicking the Display totals for All Grading Periods option check box [2]. If this check box is not selected, users can still view the total grade within an individual grading period.

Create Set

Click the Create button.
Add Grading Period

In the Grading Period Title field [1], create a title for the grading period.

In the start date field [2], enter a start date for the grading period. Start dates default to 12:00 AM. You can also use the calendar icon to select a date.
In the end date field [3], enter or select an end date for the grading period. End dates default to 11:59 PM.

The close date [4] defaults to the end date. To change the close date, enter or select a new close date.

If you enabled weighted grading [5], enter the preferred weighted percentage for the grading period. Grading periods can include any percentage greater than zero, and the total sum of all grading periods does not have to equal 100%.

**Save Grading Period**

Click the **Save** button.

**Manage Grading Periods**

<table>
<thead>
<tr>
<th>Riverside County</th>
<th>Terms: Riverside County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarter 1</td>
<td></td>
</tr>
</tbody>
</table>

To add another grading period, click the **Add Grading Period** link [1]. To edit the grading period dates, click the **Edit** icon [2]. To delete a grading period, click the **Delete** icon [3].
Integrations
What integrations are supported in a Canvas account?

This article describes the standard and supported integrations available within Canvas. Please contact your Customer Success Manager with questions about any Canvas integrations.

Integrations can be enabled at the account level, through LTI tools, or with the assistance of your Customer Success Manager. Integrations in italics represent a partial integration.

Standard Integrations

Canvas natively supports the following technological functionalities:

- User Messaging
- Theme Editor Account branding
- CAS, LDAP, and SAML Authentication
- User profile features
- RSS/Atom Feeds
- iCal
- Calendar appointment scheduler
- E-Packs/Publisher Content
- IMS QTI
- Offline course content exports (HTML or ePub)
- Podcasts
- ePortfolios
- Basic LTI
- SCORM (Assignments only)
- Common Cartridge
- Document Previews
- Media Player
- Notifications
- Student Information System imports

The following third-party providers provide standard integrations in several Canvas features:

- LaTeX (Rich Content Editor)
- Big Blue Button—basic hosting (Conferences)
- Google Docs (Assignments, Collaborations, Files, Rich Content Editor)
- Microsoft Office (Assignments, Collaborations, Files, Rich Content Editor)
Supported Integrations

Canvas provides optional integrations with a variety of third-party providers:

Web Services

- Twitter
- Delicious
- Skype
- Diigo
- SMS
- YouTube
- LinkedIn
- Google Docs/Previewer

Collaboration

- Diigo
- Adobe Connect
- Big Blue Button (premium hosting)
- Wimba
- Microsoft Office 365

Educational

- Turnitin
- Wimba
- Equella
- Respondus
- Google Drive
- Microsoft Office 365

Multimedia

- Kaltura
- Equella
- Flickr
Calendar

- Outlook
- Google

Course Imports

- WebCT (Blackboard Vista)
- Blackboard
- Angel
- Moodle 1.9/2.x
- D2L

Course Cartridges

- McGraw-Hill course cartridges
- Cengage
How do I enable Equella for an account?

Equella is a digital repository that provides a platform for teaching and learning.

To integrate Equella with your Canvas account, you will need to know your Equella endpoint URL.

Note: You must have an Equella account before you can enable Equella in Canvas.

Open Settings

In Account Navigation, click the Settings link.
Enable Equella

Features

- Let sub-accounts use the Theme Editor to customize their own branding
- Open Registration
- Users can edit their name
- Users can delete their institution-assigned email address
- Show the email address of sender for user interaction Notifications
- Equella
- Analytics
- User Avatars

On the account settings page, under the features section, select the Equella checkbox.

Enter Equella Settings

Equella Settings

Equella Endpoint

This is the URL to your equella service. It will probably look something like "http://oer.equella.com/signon.do".

Equella Comments:
In the Equella Settings section that appears, enter your Equella Endpoint URL.

**Update Settings**

Click the **Update Settings** button.
How do I manage developer keys for an account?

As an admin, you can manage developer keys for root accounts. You can manage the status for individual developer keys and control direct access to specific API endpoints for third-party tools.

Newly-created developer keys default to off in an account.

Notes:

- Developer Keys is an account permission. If you cannot view the Developer Keys link in Account Navigation, this permission has not been enabled for your user account.
- Although new keys are disabled when created, keys created prior to July 14, 2018, have been turned on by default to ensure uninterrupted access.
- Instructure does not review vendors prior to issuance of global developer keys, though specific vendor information is required. You should review your list of inherited keys to ensure that only institution-approved keys are active. To determine which developer keys are being used in your account, run the User Access Tokens report.

Open Account
In Global Navigation, click the Admin link [1], then click the name of the account [2].

**Open Developer Keys**

Sub-Accounts
Terms
Authentication
SIS Import
Themes

[Developer Keys]

Canvas Data
Portal

In Account Navigation, click the Developer Keys link.
View Developer Keys

The Developer Keys page defaults to the Account tab, where you can view the Developer Keys for your account. Each key shows the name [1], owner's email [2], details [3], stats [4], type [5], and state [6].

If a key has been configured as an LTI key, the Type column will display the External Tool icon [7].
View Inherited Keys

To view inherited keys associated with your account, click the **Inherited** tab [1]. Inherited keys are keys created and managed at a global level by Canvas. You can manage the state of inherited keys for your account. However, if a key is grayed out [2], it has been enabled globally and cannot be modified on a specific account level.
### Manage Developer Keys

#### Developer Keys

<table>
<thead>
<tr>
<th>Name</th>
<th>Owner Email</th>
<th>Details</th>
<th>Stats</th>
<th>Type</th>
<th>State</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canvas Test Key</td>
<td><a href="mailto:test@test.com">test@test.com</a></td>
<td>10810000000000003</td>
<td>Access Token Count: 0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Show Key</td>
<td>Created: Sep 23, 2015 at 6:42pm</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>URI: <a href="https://yourdomain.com">https://yourdomain.com</a></td>
<td>Last Used: Never</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To deactivate a key, click the **Off** button [1]. To edit a key, click the **Edit** icon [2]. To delete the key, click the **Delete** icon [3].

**Note:** If your institution has not enabled the Advanced Developer Keys feature option, you can deactivate keys by clicking the **Lock** icon.
View Deactivated Keys

When a key is deactivated, the key is inactive. Deactivated keys are indicated by the Off button [1]. To reactivate an inactive key, click the On button [2].

Add Developer Key
To add a developer key, click the Add Developer Key button.
How do I add a developer key for an account?

As an admin, you can create developer keys for root accounts. A developer key is a code given to the developer of a third-party application that allows access to certain information and permissions within Canvas. Developer keys can be used to create custom integrations with Canvas and allow third-party apps to use Canvas authentication. The developer key uses OAuth2 to enable the application to use Canvas for authentication. For more information about OAuth2, see the Instructure API OAuth documentation.

The developer key is sent from the application to Canvas when a user requests access. The application asks the user for permission to programmatically create an API access token. When the user authorizes the application, the third-party application will have the same access to information and account permissions as the user that granted access. For more information about developer documents, see the Instructure Github page.

**Key Scoping**

Developer Keys includes functionality for key scoping as part of adding a developer key. Key scoping allows you to control direct access to specific API endpoints for third-party tools.

**Note:** Developer Keys is an account permission. If you cannot view the Developer Keys link in Account Navigation, this permission has not been enabled for your user account.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Developer Keys

In Account Navigation, click the Developer Keys link.

Add Developer Key

Click the Add Developer Key button.
Add API Key

If you have enabled the LTI 1.3 and LTI Advantage feature option in your account, you will also need to click the Add API Key option.

Enter Key Settings

Key Settings

- **1. Key Name:**
- **2. Owner Email:**
- **3. Redirect URIs:**
- **4. Redirect URI (Legacy):**
- **5. Vendor Code (LTI 2):**
- **6. Icon URL:**
- **7. Notes:**
- **8. Test Cluster Only**

When scope enforcement is disabled, tokens have access to all endpoints available to the authorizing user.

Enter the settings for the developer key:
- **Key Name** [1]: Usually your app or company name. This field will be shown when users are asked to approve access to their Canvas account on your behalf.
- **Owner Email** [2]: The email of the person who owns the developer tool.
- **Redirect URI (Legacy) [3]**: The URI for the key redirect. This field allows you to set the previous URI for a tool. Eventually this field will be removed.
- **Redirect URIs [4]**: The domains where tokens are requested. These URIs are not your Canvas URL. To avoid mixed content browser concerns, use https.
- **Vendor Code (LTI 2) [5]**: A unique registered code which identifies the vendor or developer of the third-party tool. This is specifically for LTI 2 tools and apps.
- **Icon URL [6]**: The URL of the icon for your developer tool. This URL is presented to the user to approve authorization for your tool. To avoid mixed content browser concerns, use https.
- **Notes [7]**: Any notes about the developer key, such as the reason it was created.
- **Test Cluster Only [8]**: Creates a developer key that can only be used in the Canvas test environment.
- **Enforce Scopes [9]**: Allows you to customize access for the key. Otherwise, the key will have access to all endpoints available to the authorizing user.

### Save Key

Click the **Save Key** button.

### View Key

#### Developer Keys

<table>
<thead>
<tr>
<th>Name</th>
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<th>Details</th>
<th>Stats</th>
<th>State</th>
<th>Actions</th>
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</thead>
<tbody>
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<td><a href="mailto:test@test.com">test@test.com</a></td>
<td>108100000000000003 Show Key</td>
<td>Access Token Count: 0 Created: Sep 23, 2015 at 6:42pm Last Used: Never</td>
<td>ON</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>URL: <a href="https://yourdomain.com">https://yourdomain.com</a></td>
<td></td>
<td>OFF</td>
<td></td>
</tr>
</tbody>
</table>

View the Developer Key for your account.
How do I enable scoping for a developer key in an account?

As part of creating new developer keys or editing existing developer keys in your account, you can customize the access the key receives. Enforcing scopes allows you to control direct access and specific API endpoints for third-party tools associated with your institution.

By default, scope enforcement is disabled when creating a new developer key, which allows tokens to access all endpoints available to the authorizing user. However, scopes can be edited for a developer key at any time and update access tokens for the authorizing user appropriately.

Notes:

• Managing Developer Keys is an account permission. If you cannot manage developer keys, this permission has not been enabled for your user role.
• Developer Keys are not available in subaccounts.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Developer Keys

In Account Navigation, click the Developer Keys link.

Add Developer Key

Click the Add Developer Key button.
Add API Key

If you have enabled the LTI 1.3 and LTI Advantage feature option in your account, you will also need to click the Add API Key option.

Enforce Scopes

After you've completed the developer key information, click the Enforce Scopes button.
Search Endpoints

To search for a specific endpoint, type the name of the endpoint in the Search Endpoints field [1].

To see all available endpoints, scroll through the Endpoints table [2].
Select Read Only Endpoints

To grant read-only (GET) access to the developer key, select the **Read only** checkbox. The table will automatically update and select all scopes that contain read-only endpoints.
Select Individual Endpoints

You can grant customized access to the developer key. Click any scope name to view available endpoints [1]. Select the desired endpoints by clicking the checkbox next to the endpoint name [2]. The scope name line will update to show the summary of the collective selected endpoint access [3].

Save Key

Click the Save Key button.
Outcomes
How do I create an outcome for an account?

If you cannot find an outcome to use in your account, you can create a new outcome for the account. Outcomes can be created from the account, sub-account, or course level.

Outcomes can be included in assignment rubrics as an easy way to assess mastery of outcomes aligned to specific assignments. When you define a learning outcome, you should also define a criterion that can be used when building assignment rubrics. Define as many rubric columns as you need, and specify a point threshold that will be used to define mastery of this outcome.

View a video about Outcomes.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Outcomes

Courses
People
Statistics
Permissions
Outcomes
Rubrics
Grading

In Account Navigation, click the Outcomes link.

Add Outcome

Click the New Outcome button.
Create Outcome

Enter a name for the outcome in the **Name this outcome** field [1].

When instructors allow students to view Learning Mastery scores on the Grades page, students will see the name of the outcome. However, you may want to create a custom, **friendly name**. To create a friendly name for student view, enter a name in the **Friendly name (optional)** field [2].

You can also enter a description in the Rich Content Editor field [3].
Add Criterion Ratings

Click the Edit icon [1] to edit the criterion rating. You can change the existing name (if desired) for the criterion in the Criterion Name field [2]. Set the criterion point value by typing in the Points field [3].

To save the criterion, click the OK button [4]. To remove the criterion completely, click the Delete button [5].

To add additional criterion ratings, click the Insert link [6].
Set Mastery and Calculation Method

Set the mastery point value in the Mastery at field [1]. This field indicates the number of points that must be achieved for mastery according to the criterion ratings.

In the Calculation Method drop-down menu [2], select the calculation method for the outcome. By default, new outcomes are set to the Decaying Average calculation method in the Canvas interface.

Click the Save button [3].
View the created outcome.
How do I create outcome groups for an account?

Grouping learning outcomes in an account allows for organization of multiple related outcomes.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Outcomes

In Account Navigation, click the **Outcomes** link.

Add Outcome Group

Click the **New Group** button.
Create Outcome Group

Type a Learning Outcome group name in the Name this group field [1]. Type a description in the Rich Content Editor [2]. Click the Save button [3].

View Outcome Group
View the Outcome group. You can create new outcomes within the group by creating a new outcome. You can also move outcomes and outcome groups into the new group.
How do I import outcomes for an account?

You can bulk import outcomes for your account using a CSV file. A bulk import allows you to add new outcomes to your account or update the details of multiple outcomes at one time.

The CSV file must be formatted correctly according to the Outcomes Import Format Documentation. If you don't want to create a new CSV file, you can download the Outcomes Export report from Canvas, change it, and re-upload the same file.

After your CSV file has been processed, you will receive an email notification confirming a successful import or displaying errors with your file. If there were errors, the email will contain details about the first 100 errors including the row of the error and a short description.

Notes:

- Currently, only CSV files are supported. JSON files will be supported in a future release.
- Importing outcomes is an account permission. If you do not have permission to import outcomes, your institution has restricted this feature.
- In new outcomes, the vendor_guid field must not contain a colon.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Outcomes

In Account Navigation, click the **Outcomes** link.

Import Outcomes

Click the **Import** button.
Upload File

Drag and drop your CSV file to the upload area, or click in the upload area to choose a file from your computer.
Open File

Locate the CSV file [1] and then click the Open button [2].

View Import Status

Please wait as we upload and process your file.
It’s ok to leave this page, we’ll email you when the import is done.
Canvas displays a loading page while the file uploads. Large CSV files may take time to import. You can leave the Outcomes page at any time without disrupting the import process.

View Import Success

When the file has been successfully imported, Canvas displays a confirmation message. You will also receive an email that the import was successful.

View Import Errors and Warnings

If the import was not successful, or if the import altered existing outcomes, Canvas displays an error message.

The error message displays for outcome import errors and for outcome import warnings.

You will receive an email with details about the first 100 errors and warnings. Each error or warning will include the CSV row number and a description of the error or warning.

Import errors stop the import process entirely and need to be fixed before outcomes can be imported successfully. The following types of errors may occur in CSV files:

- Required headings are missing
- Other headings are placed after the ratings header
- Invalid headers are present
- Required fields are missing
- Import file contains no data
When an import warning occurs, Canvas skips the affected row and the import moves on. The following types of warnings may occur in CSV files:

- Rating tiers have missing points
- Rating tiers have invalid point values
- Rating tiers have points in wrong order
- Object type is incorrect
- Parent group refers to missing outcomes
- Parent groups are invalid
- Workflow state is invalid
- Calculation validation method not specified
- Group receives invalid fields
- Outcome edits are not within the same context

Correct the errors in the CSV file according to the [Outcomes Import Format Documentation](#) and re-import the file.

### View Outcomes

<table>
<thead>
<tr>
<th>Back</th>
<th>Outcome</th>
<th>Group</th>
<th>Import</th>
<th>Find</th>
<th>Manage Rubrics</th>
</tr>
</thead>
</table>

- **Core Curriculum**
  - Course Outcomes
  - [Outcomes 1](#)

#### Reading Comprehension

Student was able to understand the reading and answer basic questions about the content.

<table>
<thead>
<tr>
<th>Above Average</th>
<th>Average</th>
<th>Below Average</th>
<th>Total Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 Points</td>
<td>2 Points</td>
<td>1 Points</td>
<td>3 Points</td>
</tr>
</tbody>
</table>

Mastery: 3 Points

Calculation Method: Decaying Average

- Last Item: 40
  - Between 1% and 99%

Calculated Points:

- **Calculation Method:** 40/60 Decaying Average
  - Most recent result counts as 40% of mastery weight, average of all other results count as 60% of weight. If there is only one result, the single score will be returned.
  - **Example:**
    1. Item scores: 1, 4, 2, 3, 5, 3, 6
    2. Final score: 4.2

View the outcomes imported into your account.
How do I edit or delete an outcome in an account?

You can edit or delete outcomes in your account. Outcomes can be modified if they have been used to assess students, but any changes may affect student results.

Notes:
- You can modify any outcomes where you have permission.
- Outcomes that have been aligned with an assignment or question bank cannot be deleted unless they are removed from the assignment or question bank. Outcomes that have been used to assess a student cannot be deleted.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Outcomes

In Account or Sub-Account Navigation, click the Outcomes link.

Select Outcome

Locate the outcome you want to modify.
Modify Outcome

To edit an outcome, click the **Edit** button [1]. Editing an outcome lets you change the outcome name, description, calculation method, and other elements as set when creating an account outcome.

When you are finished with your edits, click the **Save** button.

To delete an outcome, click the **Delete** button [2].
View Outcome Edit Confirmation

If you edit an outcome that has been used to assess a student, Canvas displays a message notifying you that your edits will update all outcomes associated with a rubric that has not been assessed.

Click the Save button.

**Note:** This message only displays for outcomes you modify that have not been used to assess a student. If this confirmation message does not display, the outcome is associated with more than one rubric and edits cannot be updated.
View Assessed Outcome

If an outcome has already been used to assess a student, some modifications may affect student results [1].

To view any aligned items and student assessments for a particular outcome, click the name of the outcome [2]. These assignments and rubrics may be affected when you edit the outcome.
If you are editing scoring details on an outcome that has been used to assess students, Canvas displays a message notifying you that your edits will affect all students previously assessed using the outcome. Scoring changes only affect a student's learning mastery score in the Learning Mastery Gradebook for the edited outcome. When scoring criteria is edited, the learning mastery values scale for assessed rubrics according to the original points possible.

Click the Save button.
How do I edit or delete an outcome group in an account?

If you created an outcome group in your account that you need to edit or delete, you can do so as long as the outcomes in the group have not yet been used to assess a student. Once an outcome in the group has been used for scoring, you cannot delete the outcome group. You can still modify the details of the outcome group.

You can delete an outcome group as long as it does not contain any outcomes that cannot be modified.

**Note:** You can modify any outcomes or outcome groups where you have permission.

Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes

In Account or Sub-Account Navigation, click the **Outcomes** link.
Select Outcome Group

Locate the outcome group you want to modify.
Modify Outcome Group

To edit an outcome group, click the **Edit** button [1]. Editing an outcome group lets you change the outcome name and description as set when [creating an account outcome group](#).

To delete an outcome group, click the **Delete** button [2].

**Note:** If you delete an outcome group and the outcome group generates an error, your outcome group contains an outcome that cannot be modified. Move the outcome to another outcome group, then try deleting the outcome group again.
How do I create custom account outcome names for students?

As an admin, you can choose to allow the Student Learning Mastery Gradebook feature option for instructors to enable in their courses, which lets students see Learning Mastery scores on their Grades page. All Outcomes in the course appear in the student view. However, some official outcome names may be difficult for students to understand, so when creating outcomes at the account level, you have the option to create a custom, or more friendly name, to appear for students. This separate name field allows you to keep both the official name of the outcome as well as create a friendlier version that is more helpful for students.

Note: For instructors, creating a custom name is a course permission. If they have access, instructors can create friendly names for outcomes they create at the course level. However, they cannot create custom names for outcomes created at the account level.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Outcomes

In Account or Sub-Account Navigation, click the Outcomes link.

Create New Outcome

If you want to create a friendly name while creating a new Outcome, click the New Outcome button.

Create Friendly Name

Enter a name for the outcome in the Name this outcome field [1]. This is the name of the outcome that will also appear for instructors in their Learning Mastery Gradebook.
To create a custom outcome name for students, enter a name in the Friendly name (optional) field [2].

**Edit Outcome**

If you want to edit an existing outcome and add a friendly name, locate and click the name of the outcome [1]. Click the **Edit Outcome** button [2].

You can only edit outcomes that have not yet been used to assess a student. If the Edit Outcome button is grayed out, you cannot edit the outcome.

**Note:** Your friendly name will not appear as part of the Outcomes Index page.
How do I move outcomes and outcome groups in an account?

You can move outcomes and outcome groups after you have added them to your account or sub-account. You can use the Move Outcome or Move Outcome Group button, or you can manually drag and drop the outcome or outcome group.

**Note:** To move an outcome to an outcome group, you will need to create an outcome group.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Outcomes

In Account or Sub-Account Navigation, click the **Outcomes** link.

Select Outcome

Locate the outcome or outcome group you wish to move.
Move Outcome or Outcome Group

To move an individual outcome or outcome group, click the Move button.

Select the outcomes group where you want to move the outcome or outcome group [1].

Click the Move button [2].
Drag and Drop Outcome or Outcome Group

You can also use the drag and drop option to move outcomes and outcome groups. Click the outcome or outcome group and drag the outcome or outcome group to the desired location. Drop the outcome or outcome group in the desired location by releasing the mouse.
How do I find an existing outcome to add to an account?

All outcomes added at the account or sub-account level will be available to courses within the account. You can find and import Account Standards, which are outcomes that have been created by you or other users with admin permissions for the entire institution. You can also find State and Common Core Standards.

You can import an individual outcome or import an entire outcome group.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Outcomes

In Account or Sub-Account Navigation, click the Outcomes link.

Find Outcome

Click the Find button. You will find existing outcomes from Account, State or Common Core Standards.
Import Outcome

Select the name of an outcome group to view available outcomes [1]. You can also view outcome groups within other outcome groups.

When you have located an outcome, click the name of the outcome you want to import [2]. Click the Import button [3].

**Note:** You can also import an entire outcome group.
View Outcome

View the imported Outcomes.

Outcomes and outcome groups are imported to the main outcome level; learn how to move outcomes or outcome groups.
How do I find Learning Standards to add to an account-level outcome?

Learning Standards are goals and objectives for student assessment in the United States. These standards have been created by the nation’s governors and educational leaders to assess specific student learning.

Canvas will import the following standards for free:

- All Common Core Standards for Language Arts, Math, and Science (NGSS)
- All state specific standards for Core 4 subjects (Language Arts, Math, Science, and Social Studies) for states with current Canvas customers
- All ISTE Standards for Coaches, Computer Science Educators, Students, Teachers, and Administrators

When Learning Standards are imported into the account level, instructors who are finding standards for their course will view the Learning Standards as part of the Account Standards outcome group.

If your state does not appear in Outcomes or if your institution does not have access to learning standards, please contact your Customer Success Manager.
In Global Navigation, click the Admin link [1], then click the name of the account [2].

Open Outcomes

Courses
People
Statistics
Permissions
Outcomes
Rubrics
Grading
Question Banks

In Account or Sub-Account Navigation, click the Outcomes link.

Find Outcome

Click the Find button.
Select Outcome Type

To view state standards, click the State Standards outcome group.

To view Common Core standards, click the Common Core Standards outcome group.

Note: If State and Common Core groups are not available to you, please contact your Customer Success Manager.

Choose Outcomes
State and Common Core Standards are nested outcomes, so you can import entire outcome groups into your course, or view all nested outcome groups to locate an individual standard.

Select the name of an outcome group to view available outcomes [1]. When you have located an outcome, click the name of the outcome you want to import [2]. Click the **Import** button [3].

**View Outcomes**

<table>
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<th>Back</th>
<th>Outcome</th>
<th>Group</th>
<th>Import</th>
<th>Find</th>
<th>Manage Rubrics</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Core Curriculum</td>
<td>Course Outcomes</td>
<td>Documentation Out...</td>
<td>Group Work</td>
<td></td>
</tr>
</tbody>
</table>

- **1.1.a**
  Identify specific purpose(s) for listening (e.g., to gain information, to be entertained).

<table>
<thead>
<tr>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Does Not Meet Expectations</th>
<th>Total Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 Points</td>
<td>3 Points</td>
<td>0 Points</td>
<td>3 Points</td>
</tr>
</tbody>
</table>

View the added Outcomes.

**Note:** The account or sub-account must have the standards imported first before instructors can find and use them in their courses.
How do I view the outcomes results report for an individual student in an account?

Outcome reports can be accessed by users with adequate permissions. This includes a teacher accessing Outcomes reports in a course or a user with adequate administrative permissions accessing reports in a sub-account.

Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open People

In Account Navigation, click the **People** link.

Find User

Use the filter and search options to find the user in the account.
Open User Profile

<table>
<thead>
<tr>
<th>User</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blend, Bill</td>
<td><a href="mailto:sdemo+bblend@instructure.com">sdemo+bblend@instructure.com</a></td>
</tr>
<tr>
<td>Bond, Dylan</td>
<td><a href="mailto:dylan.bond@example.com">dylan.bond@example.com</a></td>
</tr>
<tr>
<td>Boone, Emily</td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
</tr>
</tbody>
</table>

In the search results, click the user's name.

See Outcome Results

Emily Boone

Name and Email

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name:</td>
<td>Emily Boone</td>
</tr>
<tr>
<td>Display Name:</td>
<td>Emily Boone</td>
</tr>
<tr>
<td>Sortable Name:</td>
<td>Boone, Emily</td>
</tr>
<tr>
<td>Profile Picture:</td>
<td><img src="image" alt="Remove avatar picture" /></td>
</tr>
<tr>
<td>Default Email:</td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
</tr>
<tr>
<td>Time Zone:</td>
<td>Mountain Time (US &amp; Canada)</td>
</tr>
</tbody>
</table>

Click the See Outcome Results for [student name] link.
View Outcome Results

<table>
<thead>
<tr>
<th>Outcome</th>
<th>Attempts</th>
<th>Latest Score</th>
<th>Avg Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.d</td>
<td>1 attempt from 1 artifact</td>
<td>3.0 out of 5.0</td>
<td>60.0%</td>
</tr>
<tr>
<td>1.1.c</td>
<td>1 attempt from 1 artifact</td>
<td>3.0 out of 5.0</td>
<td>60.0%</td>
</tr>
<tr>
<td>1.1.b</td>
<td>1 attempt from 1 artifact</td>
<td>5.0 out of 5.0</td>
<td>100.0%</td>
</tr>
<tr>
<td>1.1.a</td>
<td>1 attempt from 1 artifact</td>
<td>5.0 out of 5.0</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

If an instructor has linked assignments or rubrics to Outcomes, the results will show up in this report. The report shows the Outcome, Attempts, Latest Score, and Average Percent [1]. The report will populate once the student turns in assignments or does something related to an Outcome.

If you want to see the artifacts linked to the Outcomes, click the **Show All Artifacts** button [2]. You can also view the student’s result for other Outcomes (if any) by clicking the other results option.

**Note**: Outcome results are tied to level of outcome access. Account outcomes display on the account report, while the sub-account outcomes display on the sub-account report. The only time outcomes would be displayed on both reports is if they are stored in both accounts, such as copying an account outcome to the sub-account level. Outcomes created at the course-level display on the course-level and will not appear on account or sub-account level outcome reports.
How do I use the People page in an account?

You can view all users in your account in the People page. You can view and filter users by course role and search for users individually. You can also sort search result columns in ascending or descending order.

For all users, you can manage and create account groups, manage profile pictures, and view user profiles.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open People

In Account Navigation, click the People link.
View People in Sub-Accounts

If you have organized courses in your account by sub-accounts and those courses include enrollments, click the **Sub-Accounts** link to locate and open the sub-account, then click the sub-account's **People** link.
View People

The People page displays all the users in the account. The page is designed with global settings at the top of the page [1] followed by the generated user data [2].

All fields are responsive to the width of the browser, which can be adjusted as needed to display course data.

### Search and Filter Users

Global settings include searching and filtering by user data. Filters and search fields are updated dynamically.

The People page displays users by all course roles by default. To filter users by individual role, select the Roles menu [1].

To search for a specific user, type part of the user's name or their full name in the search field [2].

**Note:** The Roles menu does not include admin roles.

---

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>SIS ID</th>
<th>Last Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black, Benjamin</td>
<td><a href="mailto:benjamin.black@example.com">benjamin.black@example.com</a></td>
<td>user_id_093</td>
<td></td>
</tr>
<tr>
<td>Black, Jaclyn</td>
<td><a href="mailto:jaclyn.a.black@gmail.com">jaclyn.a.black@gmail.com</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blake, Christian</td>
<td><a href="mailto:christian.blake@example.com">christian.blake@example.com</a></td>
<td>user_id_117</td>
<td></td>
</tr>
<tr>
<td>Blend, Bill</td>
<td><a href="mailto:sdemo+bblend@instructure.com">sdemo+bblend@instructure.com</a></td>
<td>sdemo+bblend@instructure.com_1460584933</td>
<td></td>
</tr>
<tr>
<td>Bond, Dylan</td>
<td><a href="mailto:dylan.bond@example.com">dylan.bond@example.com</a></td>
<td>user_id_118</td>
<td></td>
</tr>
<tr>
<td>Boone, Emily</td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
<td>emilyboone</td>
<td>9:12am</td>
</tr>
</tbody>
</table>
Manage Users

To add a user to the account, click the Add People button [1]. The Add People button only displays if you have permission to manage enrollments.

To manage account-level user options, click the Options menu [2]. If you have appropriate permissions, you can manage profile pictures and view user groups.

View Users

The People page paginates filter and search results in sets of 15 users and are ordered alphabetically by last name. Each paginated page displays in a table format but columns are responsive according to the widest column for that page.
Results display the name of the user [1], email address [2], SIS ID (if applicable) [3], and last login date and time [4]. A login on the current date displays the time only.

Each column heading can be sorted in ascending or descending order.

**Note:** Viewing user email addresses is an account permission. Depending on your permissions, you may not be able to view a user’s email address.

### Manage User

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>SIS ID</th>
<th>Last Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black, Ben</td>
<td><a href="mailto:benjamin.black@example.com">benjamin.black@example.com</a></td>
<td>user_id_093</td>
<td></td>
</tr>
<tr>
<td>Black, Jaclyn</td>
<td><a href="mailto:jaclyn.a.black@gmail.com">jaclyn.a.black@gmail.com</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blake, Christian</td>
<td><a href="mailto:christian.blake@example.com">christian.blake@example.com</a></td>
<td>user_id_117</td>
<td></td>
</tr>
<tr>
<td>Blend, Bill</td>
<td><a href="mailto:sdemo+bblend@instructure.com">sdemo+bblend@instructure.com</a></td>
<td>sdemo+bblend@instructure.com_1460584933</td>
<td></td>
</tr>
<tr>
<td>Bond, Dylan</td>
<td><a href="mailto:dylan.bond@example.com">dylan.bond@example.com</a></td>
<td>user_id_118</td>
<td></td>
</tr>
<tr>
<td>Boone, Emily</td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
<td>emilyboone</td>
<td>9:12am</td>
</tr>
</tbody>
</table>

To open a user’s profile, click the name of the user [1].

For quick access to user data, you can act as the user [2], send a message from the Conversations Inbox [3], and edit user details [4].
View User Profile

<table>
<thead>
<tr>
<th>Name and Email</th>
<th>Login Information</th>
<th>Enrollments</th>
<th>Page Views</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emily Boone</td>
<td>emily.boone</td>
<td>Courses (31)</td>
<td>Page Views</td>
</tr>
<tr>
<td>Full Name: Emily Boone</td>
<td>SIS ID: 123456</td>
<td>8th Grade Math</td>
<td>Last request: Sep 1, 2023 at 10:00 am</td>
</tr>
<tr>
<td>Display Name: Emily Boone</td>
<td>Integration ID:</td>
<td>Biology 101 Biology 101 Section 1</td>
<td>Last request: Sep 1, 2023 at 10:00 am</td>
</tr>
<tr>
<td>Sortable Name: Emily Boone</td>
<td></td>
<td>Biology 101 Fall 2017</td>
<td>Last request: Sep 1, 2023 at 10:00 am</td>
</tr>
<tr>
<td>Profile Picture:</td>
<td></td>
<td>Group 30</td>
<td>Last request: Sep 1, 2023 at 10:00 am</td>
</tr>
<tr>
<td>Default Email: <a href="mailto:emily.boone@canvas.com">emily.boone@canvas.com</a></td>
<td></td>
<td>Student Group 1</td>
<td>Last request: Sep 1, 2023 at 10:00 am</td>
</tr>
<tr>
<td>Time Zone: Mountain Time (US &amp; Canada)</td>
<td></td>
<td>Discussion Group 1</td>
<td>Last request: Sep 1, 2023 at 10:00 am</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Study Group 1</td>
<td>Last request: Sep 1, 2023 at 10:00 am</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Last request: Sep 1, 2023 at 10:00 am</td>
</tr>
</tbody>
</table>

The user’s profile displays information about the user in several areas:

- **Name and Email**: shows the user’s full name, display name, sortable name, profile picture, default email, and time zone. As an admin, you can edit the user’s profile details, act as the user, merge the user’s account, and delete the user from the account.

- **Login information**: shows the user’s login information, SIS ID (if any), account, and last request. If permitted, you can manually manage login information to edit the login information or add an additional login and password.

- **Enrollments**: shows the enrollments for the user grouped by courses and/or accounts (if the user is also an admin).

- **Page Views**: shows the most recent page views for the user.

When available, you can also view outcome results for the user and send a message to the user.
How do I add users to an account?

You can add new users to your account. Users can only be added at the account level.

If you use SIS Imports, you do not need to add any users to your account, as they can be added through your student information system (SIS).

Account Invitations

When a user account is manually added, Canvas gives an option to generate an account invitation. If this invitation is sent, the user is invited to complete the registration process by creating a password. Once the user has an account, the user can also be added to a course. If a user is invited to a course without having an account, the user will have to create an account before accepting the course invitation.

When users are invited to a course manually, they can view the course invitation link in their email and click it to view a preview of the Canvas course. To officially accept, they must click an Accept button in the Canvas interface. However, if you prefer to disable course previews and have users automatically join the course when they view the Canvas course, please contact your Customer Success Manager to disable invitation previews.

Email Addresses

Canvas identifies users by email address. When students are added to a course, Canvas attempts to reconcile any email address conflicts when the user first logs in to the course:

- If the user does not have a username in the course’s root account, the user’s email address is linked to another user within the account, or the institution does not use delegated authentication if open registration is enabled, an account will be created for the user. Adding an email address that is not already linked to an account will only work if Open Registration is enabled.
- If the email address is already associated with an account, the student will be asked to log in to Canvas using his or her existing email address.
- Sometimes a student may be using multiple email addresses within Canvas. If a student responds to an account invitation at one email address, but is logged in to Canvas using a different email address, the student will be asked if they want to link both addresses to the same account.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open People

Courses

People

Statistics

Permissions

Outcomes

Rubrics

Grading

In Account Navigation, click the People link.

Add User

Search people...

Click the Add People button.
Add User Details

Complete the following fields:

- **Full Name** [1] is used for grading, SIS imports, and other administrative items.
- **Display Name** [2] is the what other users will see in discussions, announcements, etc. The user can set his or her own display name if the setting is enabled.
- **Sortable Name** [3] is the user’s last name, first name default. This name appears in sorted lists and admins can search for it.
- **Email** [4] is used as the user’s default email address in Canvas. Emails are used to send course notifications.
- **SIS ID** [5] is the SIS ID of the user. This field is only used for institutions using SIS imports and only displays to you if you have the correct account-level SIS permissions.
- **Email the user about this account creation** [6] is an option to send the user an email about his or her new account. This option is selected by default. If you do not want the user to be notified about the account, deselect this checkbox.
Add User

Click the Add User button.

Canvas Admin Guide Updated 2019-08-05
How do I edit a user's name, time zone, or email in an account?

You can manually edit a user's details in your account.

**Note**: If your account manages user information through a student information system (SIS), changes will also have to be made in the SIS. Any changes made in Canvas will not be passed back to the SIS.

Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open People

In Account Navigation, click the People link.

Find User

Use the filter and search options to find the user in the account.
Open User Profile

<table>
<thead>
<tr>
<th></th>
<th>Full Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blend, Bill</td>
<td><a href="mailto:sdemo+bblend@instructure.com">sdemo+bblend@instructure.com</a></td>
<td></td>
</tr>
<tr>
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<td><a href="mailto:dylan.bond@example.com">dylan.bond@example.com</a></td>
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<tr>
<td>Boone, Emily</td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
<td></td>
</tr>
</tbody>
</table>

In the search results, click the user's name.

Edit User Details

Emily Boone

Name and Email

- **Full Name:** Emily Boone
- **Display Name:** Emily Boone
- **Sortable Name:** Boone, Emily
- **Profile Picture:** [Remove avatar picture](#)
- **Default Email:** emily.boone.canvas@gmail.com
- **Time Zone:** Mountain Time (US & Canada)

See Outcome Results for Emily Boone

Click the **Edit** link.
Update Details

You can edit some of this user's information, but they can change it back if they choose.

- **Full Name** is used for grading, SIS imports, and other administrative items [1].
- **Display Name** is what other users will see in discussions, announcements, etc. [2]. The user can set his or her own display name if the setting is enabled.
- **Sortable Name** is the user's last name, first name default and it can be edited [3]. This appears in sorted lists and admins can search for it.
- **Time Zone** can be set to where the user or institution is located [4].
- **Default Email** is the user's contact method [5].

When you are done, click the **Update Details** button [6].
How do I manage a user's login information in an account?

You can manually manage a user's login information in an account. You can create a new login for a user to access Canvas through your Canvas URL and also delete logins.

If you have permission, you can also edit passwords for existing user logins. If you cannot view the password field for a user's existing login, you cannot edit the user's password. For assistance with this feature, please contact your Customer Success Manager. Users need to reset their passwords through the institution's password management system.

**Notes:**

- New or updated login information is not automatically sent to the student. Changes need to be communicated to the student. For security, login information should not be sent through email and should be communicated verbally.
- If your account manages user information through a student information system (SIS), changes will also have to be made in the SIS. Any changes made in Canvas will not be passed back to the SIS.
- A student's login displays in the secondary ID field in the Gradebook. If a student has multiple logins, the secondary ID corresponds to whatever login is listed first in the user details page unless the login includes an SIS ID. A login associated with an SIS ID regardless of position is displayed in the Gradebook as the secondary ID and the People page as the login ID.
Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open People

In Account Navigation, click the People link.

Find User

Use the filter and search options to find the user in the account.
Open User Profile

<table>
<thead>
<tr>
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</tr>
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<tbody>
<tr>
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<td><a href="mailto:sdemo+bblend@instructure.com">sdemo+bblend@instructure.com</a></td>
</tr>
<tr>
<td>Bond, Dylan</td>
<td><a href="mailto:dylan.bond@example.com">dylan.bond@example.com</a></td>
</tr>
<tr>
<td><strong>Boone, Emily</strong></td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
</tr>
</tbody>
</table>

In the search results, click the user's name.

Add Login

Emily Boone

- **Name and Email**
  - Full Name: Emily Boone
  - Display Name: Emily Boone
  - Sortable Name: Boone, Emily
  - Profile Picture: [Remove avatar picture](#)
  - Default Email: emily.boone.canvas@gmail.com
  - Time Zone: Mountain Time (US & Canada)

- **Login Information**
  - sdem+boone.canvas@gmail.com
    - SIS ID: emilyboone
    - Integration ID: [Documentation](#) [Canvas](#)
    - Last request: Sep 13 at 1:31pm
      - more...

To add a new login, click the **Add Login** link.
In the **Login** field [1], create a login for the user. The login can be a username or email and contain letters, numbers, or the following symbol characters: `- _ = +.

In the **Password** field [2], create a password for the user. Then confirm the password [3].

Click the **Add Login** button [4].

**Note:** You may also be able to add an SIS ID and Integration ID (secondary SIS ID) for the user login.
Edit Login

To edit an existing login, click the Edit icon.
Update Login

Update any login details as necessary.

When you are done, click the **Update Login** button [2].

**Note:** If you cannot view the password fields, you do not have permission to manage existing user passwords. The user must reset their password through the institution's password management system.
Delete Login

<table>
<thead>
<tr>
<th>Name and Email</th>
<th>See Outcome Results for Emily Boone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name:</td>
<td>Emily Boone</td>
</tr>
<tr>
<td>Display Name:</td>
<td>Emily Boone</td>
</tr>
<tr>
<td>Sortable Name:</td>
<td>Boone, Emily</td>
</tr>
<tr>
<td>Profile Picture:</td>
<td><img src="image" alt="Remove avatar picture" /></td>
</tr>
<tr>
<td>Default Email:</td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
</tr>
<tr>
<td>Time Zone:</td>
<td>Mountain Time (US &amp; Canada)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Login Information</th>
<th>Documentation</th>
<th>Last request:</th>
<th>SIS ID:</th>
<th>Integration ID:</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
<td>Canvas</td>
<td>Sep 13 at 1:31pm</td>
<td>emilyboone</td>
<td>emilyboone</td>
</tr>
<tr>
<td></td>
<td>Documentation</td>
<td>Dec 8, 2016 at 9:58am</td>
<td>SIS ID:</td>
<td>Integration ID:</td>
</tr>
<tr>
<td></td>
<td>Canvas</td>
<td>more...</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>more...</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To delete a login, click the **Delete** icon.
How do I merge users in an account?

You can merge two users within your account. Merging accounts combines the logins, contact methods, and enrollments for the two user accounts. Page views are not retained for the user who was merged.

After the accounts have been merged, the user can use the logins that originated from either account to view all their course enrollments within the same account.

**Note:** Merging user accounts cannot be undone in the Canvas interface. If necessary, users may be able to be split using the [Canvas Users API](https://canvas.instructure.com/api) within 180 days of the user merge, though merged users cannot be fully restored to their previous state.

Open Account

Open in Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open People

In Account Navigation, click the People link.

Find User

Use the filter and search options to find the user in the account.
Open User Profile

| Blend, Bill | sdemo+bblend@instructure.com |
| Bond, Dylan | dylan.bond@example.com |
| Boone, Emily | emily.boone.canvas@gmail.com |

In the search results, click the user's name.

Merge User

Emily Boone

See Outcome Results for Emily Boone

Name and Email

- Full Name: Emily Boone
- Display Name: Emily Boone
- Sortable Name: Boone, Emily
- Profile Picture: (Remove avatar picture)
- Default Email: emily.boone.canvas@gmail.com
- Time Zone: Mountain Time (US & Canada)

Edit | Act as User | Merge with Another User | Delete from Documentation Canvas

Click the Merge with Another User link.
Find User Account

Locate the user account where you want to merge the user's information. You can either search for the user or enter the user's ID.

If you are enrolled in multiple accounts, the User Accounts page displays an account menu [1]. In the drop-down menu, select the account where the user is located.

To locate a user by name, type the user's name in the Name field [2]. Select the user when the full name appears [3]. After confirming the user, click the Select button [4].

To select a user by user ID, enter the ID in the User ID field [5] and click the Go button [6].

Note: The User ID is found at the end of your Canvas URL (i.e. account.instructure.com/account/XXXXXX/users/XXXXXX).
Merge User Accounts

You’ve selected to merge the user, Emily Boone (emily.boone.canvas@gmail.com) into the account, Emily J. Boone (emily.boone.canvas+1@gmail.com). This process will have the following end result:

<table>
<thead>
<tr>
<th>User</th>
<th>Action</th>
<th>Emails</th>
<th>Logins</th>
<th>Enrollments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emily Boone</td>
<td>will be deleted</td>
<td><a href="mailto:email@email.com">email@email.com</a></td>
<td><a href="mailto:emboone86@gmail.com">emboone86@gmail.com</a></td>
<td>American History Spring 2016</td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
<td><a href="mailto:emily.boone.canvas+1@gmail.com">emily.boone.canvas+1@gmail.com</a></td>
<td>Bio 101 Fall 2014</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Bio 101 Summer 2015</td>
</tr>
</tbody>
</table>

After selecting the user account to merge, you will see the process and end result table.

The table will show you the User, Action, Emails, Logins, and Enrollments of each user [1]. The table will tell you what will be deleted and kept.

If you want to change positions of the users so one gets deleted and the other does not, click the Switch User Positions button [2].

You can also click the Merge Someone Else With [User Name] [3] for either of the users if you decide to change the users.

When you are ready, click the Prepare to Merge Users button [4].

Note: The table will not display enrollments in concluded courses or courses in an unpublished state.
Confirm Merge

Really Merge User Accounts?

This process cannot be undone, so please make sure you're certain before you continue.

Are you sure you want to merge the account, Emily Boone (emily.boone.canvas@gmail.com) into this account, Emily J. Boone (emily.boone.canvas+1@gmail.com)? This process will have the following end result:

<table>
<thead>
<tr>
<th>User</th>
<th>Emily Boone</th>
<th>Emily J. Boone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>will be deleted</td>
<td>will be kept</td>
</tr>
<tr>
<td>Emails</td>
<td>no emails</td>
<td><a href="mailto:email@email.com">email@email.com</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="mailto:emboone86@gmail.com">emboone86@gmail.com</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="mailto:emily.boone.canvas+1@gmail.com">emily.boone.canvas+1@gmail.com</a></td>
</tr>
<tr>
<td>Logins</td>
<td>no logins</td>
<td><a href="mailto:emboone86@gmail.com">emboone86@gmail.com</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="mailto:emily.boone.canvas+1@gmail.com">emily.boone.canvas+1@gmail.com</a></td>
</tr>
<tr>
<td>Enrollments</td>
<td>no enrollments</td>
<td>American History Spring 2016</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bio 101 Fall 2014</td>
</tr>
</tbody>
</table>

You will be prompted one more time to ask if you are sure about merging the users together. When you are ready, click the Merge User Accounts button.

Note: This process cannot be undone.

View Confirmation

User merge succeeded! Emily J. Boone and Emily Boone are now one and the same.

Confirm the merge was successful.
How do I delete a user from an account?

You can delete a user from your account.

Notes:

- This process cannot be undone and will remove the user's data (including grades) from all courses and groups.
- If your account manages user information through a student information system (SIS), changes will also have to be made in the SIS. Any changes made in Canvas will not be passed back to the SIS.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open People

In Account Navigation, click the People link.

Find User

Use the filter and search options to find the user in the account.
Open User Profile

In the search results, click the user's name.

Delete User

Locate the **Delete from [account title]** link to delete the user.
Confirm Deletion

Confirm Delete Emily Boone from Documentation Canvas

Are you sure you want to delete this user from the account Documentation Canvas? This will remove the user’s data (including grades) from all courses and groups. This process cannot be undone.

After clicking on the delete link, you will be asked if you are sure you want to delete the user. If you are sure, click the Delete [User Name] button.

Note: This will remove the user’s data (including grades) from all courses and groups. This process cannot be undone.
How do I act as another user in an account?

Acting as a user allows admins to log in as the user without a password. You can take any action as though you are the user, but the audit logs will show that you performed the tasks while acting as that user. Audit logs can be viewed by admins who have access to Canvas Data files. Audit logs are also available by downloading the Page Views CSV file. This file displays all user activity for a specific user, including actions an admin performs when they masquerade as the user.

Only account-level users with the Act as users account permission can act as other users—this permission does not apply to sub-account admins.

Notes:

- When acting as a user, language preferences do not apply and will always be shown in the default language.
- To act as another admin, you must have all the permissions enabled in your account that have been enabled for that admin.
- If your institution has a trust agreement with another institution, trust accounts do not grant permission for you to act as users associated with a different Canvas URL. You can only act as users who are associated with your same account.
- Additionally, once you are acting as a user, any user role that can view the user details page displays the Act as Users link in the user details page. This behavior takes place because of an override to your permissions and helps you quickly act as another user; it does not mean that the user for whom you are acting is also able to act as other users.
- Any Canvas feature that requires or modifies a user’s API access token cannot be modified through acting as a user.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open People

In Account Navigation, click the **People** link.

Find User

Use the filter and search options to find the user in the account.
Open User Profile

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roberts, Carolyn</td>
<td><a href="mailto:carolyn.roberts@example.com">carolyn.roberts@example.com</a></td>
</tr>
<tr>
<td>Roberts, Doug</td>
<td><a href="mailto:doug.roberts.canvas@gmail.com">doug.roberts.canvas@gmail.com</a></td>
</tr>
<tr>
<td>Robertson, Austin</td>
<td><a href="mailto:austin.robertson@example.com">austin.robertson@example.com</a></td>
</tr>
</tbody>
</table>

In the search results, click the user's name.

Act as User

**Doug Roberts**

See Outcome Results for Doug Roberts

Name and Email

- Full Name: Doug Roberts
- Display Name: Doug Roberts
- Sortable Name: Roberts, Doug
- Profile Picture: [Remove avatar picture](#)
- Default Email: doug.roberts.canvas@gmail.com
- Time Zone: Mountain Time (US & Canada)

Click the **Act as User** link.
Proceed as User

The Act as User page confirms the user’s information. If the user has multiple login credentials, all login IDs are displayed for additional user verification. Click the **Proceed** button.
View Canvas as User

While you are acting like the user you will see what the user sees, but the audit reports will show that you performed those tasks and not the actual user. You will know that you are acting as a user by the information box at the bottom of the screen that says **You are currently acting as [User]**.

Stop Acting as User

When you are finished acting as the user, click the **Stop Acting as User** button.
How do I send a message to a user in an account?

You can view a user in your account and send a message to the user.
The message link connects to your Conversations Inbox, which you can also use to message a user directly.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open People

In Account Navigation, click the People link.

Find User

Use the filter and search options to find the user in the account.
Open User Profile

<table>
<thead>
<tr>
<th>User Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blend, Bill</td>
<td><a href="mailto:sdemo+bblend@instructure.com">sdemo+bblend@instructure.com</a></td>
</tr>
<tr>
<td>Bond, Dylan</td>
<td><a href="mailto:dylan.bond@example.com">dylan.bond@example.com</a></td>
</tr>
<tr>
<td>Boone, Emily</td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
</tr>
</tbody>
</table>

In the search results, click the user's name.

Message User

Emily Boone

See Outcome Results for Emily Boone

<table>
<thead>
<tr>
<th>Name and Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name: Emily Boone</td>
</tr>
<tr>
<td>Display Name: Emily Boone</td>
</tr>
<tr>
<td>Sortable Name: Boone, Emily</td>
</tr>
<tr>
<td>Profile Picture: Remove avatar picture</td>
</tr>
<tr>
<td>Default Email: <a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
</tr>
<tr>
<td>Time Zone: Mountain Time (US &amp; Canada)</td>
</tr>
</tbody>
</table>

Click the Message [User Name] button.
Send Message

Canvas redirects you to the Conversations Inbox, where you can compose your message to the student.

When you are finished, click the Send button.
How do I view the enrollments for a user in an account?

As an admin, you can view all course, group, and account enrollments for a user in your account.

This page also allows you to quickly unenroll a user from any course, group, or account, if necessary. At the account level, unenrolling a user from a course or group has the same result as removing an enrollment in a course, except you can unenroll the user from multiple courses or groups at once.

Enrollments are commonly managed automatically in Canvas through student information system CSV files. However, if your instructors have permission to add or remove users, enrollments can be managed manually by a course instructor.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open People

In Account Navigation, click the People link.

Find User

Use the filter and search options to find the user in the account.
Open User Profile

In the search results, click the user's name.

View Enrollments

Enrollments are located in the Enrollments section. Enrollments are separated into courses [1] and groups [2].

If a user has been added to an account, the Enrollments section will also display a list of accounts where the user resides [3].
View Course Details

The Courses section shows all courses where the user is enrolled.

Each course includes the course name [1], the term where the course resides [2], the user's enrollment status [3], and the user's role [4].

To access the course, click the name of the course.

View Group Details

Groups (20)

- **Student Group 1**
  - Simple Canvas Course

- **Discussion Group 1**
  - Classic Literature

- **Study Group 1**
  - Classic Literature

- **Group A**
The Groups section shows all groups where the user is enrolled.

Each group includes the group name [1] and the name of the course or account where the group resides [2].

To access the group, click the name of the group.

**Note:** To unenroll a user from a group, you must open the account or course and manage the user’s enrollment.

**View Account Details**

The Accounts section shows all accounts where the user is enrolled as an account admin.

To access the account, click the name of the account.

**Unenroll User**

To unenroll a user from a course, group, or account, locate the appropriate section in the enrollments list. Next to the course, group, or account where you want to unenroll the user, click the Delete icon [1] then click the OK button [2]. The user will no longer have access to the course, group, or account.
How do I view the page views for a user in an account?

You can view the page views for a user in your account. You can also download page views as a CSV file.

The Page views section only displays user data for the last 365 days.

Note: Viewing page views is an account permission. If you cannot view page views, your institution has restricted this feature.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open People

Courses

People

Statistics
Permissions
Outcomes
Rubrics
Grading

In Account Navigation, click the People link.

Find User

All Roles  Search people...  People  

Use the filter and search options to find the user in the account.
Open User Profile

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blend, Bill</td>
<td><a href="mailto:sdemo+bblend@instructure.com">sdemo+bblend@instructure.com</a></td>
</tr>
<tr>
<td>BD Bond, Dylan</td>
<td><a href="mailto:dylan.bond@example.com">dylan.bond@example.com</a></td>
</tr>
<tr>
<td>Boone, Emily</td>
<td><a href="mailto:emily.boone.canvas@gmail.com">emily.boone.canvas@gmail.com</a></td>
</tr>
</tbody>
</table>

In the search results, click the user's name.

View Page Views

<table>
<thead>
<tr>
<th>URL</th>
<th>Date</th>
<th>Participated</th>
<th>Time</th>
<th>User Agent</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="https://documentation.instructure.com/courses/367/discussion_topics/3582/reply">https://documentation.instructure.com/courses/367/discussion_topics/3582/reply</a></td>
<td>Jul 27 at 2:48pm</td>
<td>7</td>
<td>Canvas for iOS</td>
<td></td>
</tr>
<tr>
<td><a href="https://documentation.instructure.com/apiv1/courses/367/discussion_topics/3582/entries">https://documentation.instructure.com/apiv1/courses/367/discussion_topics/3582/entries</a></td>
<td>Jul 27 at 2:48pm</td>
<td>✓</td>
<td>Canvas for iOS</td>
<td></td>
</tr>
<tr>
<td><a href="https://documentation.instructure.com/courses/367/discussion_topics/3582">https://documentation.instructure.com/courses/367/discussion_topics/3582</a></td>
<td>Jul 27 at 2:48pm</td>
<td>--</td>
<td>Canvas for iOS</td>
<td></td>
</tr>
<tr>
<td><a href="https://documentation.instructure.com/courses/367">https://documentation.instructure.com/courses/367</a></td>
<td>Jul 27 at 2:48pm</td>
<td>259</td>
<td>Canvas for iOS</td>
<td></td>
</tr>
<tr>
<td><a href="https://documentation.instructure.com/accounts/1/users/168">https://documentation.instructure.com/accounts/1/users/168</a></td>
<td>Jul 27 at 2:44pm</td>
<td>--</td>
<td>Chrome 67.0</td>
<td></td>
</tr>
<tr>
<td><a href="https://documentation.instructure.com/courses/367/grades">https://documentation.instructure.com/courses/367/grades</a></td>
<td>Jul 27 at 2:44pm</td>
<td>--</td>
<td>Chrome 67.0</td>
<td></td>
</tr>
<tr>
<td><a href="https://documentation.instructure.com/courses/367">https://documentation.instructure.com/courses/367</a></td>
<td>Jul 27 at 2:43pm</td>
<td>--</td>
<td>Chrome 67.0</td>
<td></td>
</tr>
<tr>
<td><a href="https://documentation.instructure.com/3login_success-1">https://documentation.instructure.com/3login_success-1</a></td>
<td>Jul 27 at 2:43pm</td>
<td>--</td>
<td>Chrome 67.0</td>
<td></td>
</tr>
</tbody>
</table>

At the bottom of the User Details page, the Page Views table shows the URL the student viewed [1], the date the page was accessed [2], whether or not the user participated in the page [3], the interaction time with the page [4], and the user's browser agent [5].

In the User Agent column, you can also view if the user participated in a course using an access token from a developer key. The name of the associated app will appear in the page views, which helps differentiate user access tokens from web sessions and identify the associated developer key. Page views also support activity in Canvas mobile apps, so you can view when a user...
accesses and participates in a course using a mobile device. Mobile page views are sent to Canvas from the mobile apps when a user leaves, or backgrounds, the app.

- **Participated** indicates whether the user participated in an activity that required action, such as submitting an assignment, replying to a discussion, or contributing to a page.
- **Time** is calculated by the number of seconds a user interacts with a Canvas page. Canvas records interactions at a minimum of 10 seconds or a maximum of 5 minutes to document when a user physically interacts with the page, such as clicking the mouse or using the keyboard.

You can download the page views as a CSV file by clicking the CSV link [6]. The generated CSV file contains more information than displayed in the Page Views window, such as the IP address used for each page view.

For further details about student interaction you can view individual student analytics in a course.

**Notes:**

- The CSV file will only display up to 300 lines of data. Information existing outside of this range can be accessed via the Canvas Users API.
- Descriptions of Page Views CSV column headings can be found in the Canvas Users API documentation.
- The Page Views CSV file contains information about user activity in Canvas. When an admin masquerades as a user, the real_user_id column displays the admin's User ID. A blank cell in this column indicates that the user was logged in.
How do I manage profile pictures for users in an account?

If your account has enabled profile pictures for your users, you can manage all profile pictures for your account. Profile pictures are public and automatically approved when users upload an image in their settings. Using profile pictures can make it easier to see the users in your account and managing them gives you the ability to keep the pictures appropriate.

If Gravatars are enabled for an institution in account settings, and a user has a Gravatar but chooses not to upload a profile picture, the Gravatar will display for the user's profile picture.

If a student views another student's user details in a course and reports a profile picture as inappropriate, you can review those profile pictures and approve, lock, or delete the picture. In the courses, instructors can remove profile pictures completely from a user's details page.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open People

In Account Settings, click the People link.

Manage Profile Pictures

Click the Manage Profile Pictures link.
View Profile Pictures

Profile Pictures

You can view and filter profile pictures by the following categories:

- **Submitted** [1]: pictures that users have submitted but they haven't been approved or deleted
- **Reported** [2]: pictures that have been reported
- **Approved, Re-Reported** [3]: pictures that have been approved and re-reported
- **All** [4]: all the pictures within the account

Manage Profile Picture

Within each category, you can manage individual profile pictures with links to approve, lock, or delete the picture [1]. Locking the profile picture means the image is approved but the user cannot change the profile picture. Locked profile pictures can be unlocked at any time.

Each status (except submitted) includes an associated icon [2]:

- approved profile pictures display a check mark
- locked profile pictures display a lock icon
- reported profile pictures display a warning icon
How do I view groups in an account?

You can view existing groups in your account. Viewing groups at the account level is similar to viewing groups at the course level. The groups created at the account level will still show up in the Groups menu in the Global Navigation menu.

Note: Viewing user groups is an account permission. If you cannot view user groups, your admin has restricted this option.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open People

In Account Settings, click the People link.

View User Groups

Click the View User Groups link.
View Group Sets

Once you create a group set in your account, the group set displays as a tab for easy access to the group information [1]. You can also view a group set directly by clicking the name of the tab.

The highlighted tab shows which group set you are viewing [2]. Click any tab to view another group set.
View Groups

When you created the group set, you also created groups, either manually or automatically.

By default, all groups are collapsed in the page. You can expand each group and see which students are assigned to each group in the group set, if any, by clicking the arrow next to the group name [1].

Once users are participating in a group, you can view their activity within a group by clicking the group Options icon [2] and selecting the Visit Group Homepage link [3].

Add Group Set

To add a group set, click the Add Group Set button.

Add Group Set
Manage Group Set

<table>
<thead>
<tr>
<th>Admin Groups</th>
<th>Clubs</th>
<th>Faculty Groups</th>
<th>Learn Canvas Groups</th>
<th>Librarians</th>
<th>Online Instructors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Groups</td>
<td>TA Groups</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search groups</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Faculty Group 1**: 3 users
- **Faculty Group 2**: 1 user
- **Faculty Group 3**: 1 user

To manage a group, click the group **Options** icon [1].

To edit the name of the group, click the **Edit** link [2]. To delete the group, click the **Delete** link [3].

**Note**: Currently the Randomly Assign Students link is not supported in account groups. All users must be added manually to each group.
How do I add groups in a group set in an account?

Creating groups at the account-level is similar to viewing groups at the course-level. The groups created at the account-level will still show up in the Groups Menu in Global Navigation. You can also create groups at the sub-account level.

Notes:

- Viewing user groups is an account permission. If you cannot view user groups, your admin has restricted this option.
- Setting up groups for the purposes of collaboration is better handled through building courses or groups under the appropriate sub-account level, since you can't assign non-admins to sub-accounts.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open People

In Account Settings, click the People link.

View User Groups

Click the View User Groups link.

Add Group Set
Click the Add Group Set button.

**Create Group Set**

In the **Group Set Name** field [1], enter a name for the group. Click the **Save** button [2].

**Add Group**

In the new group set [1], click the **Add Group** button [2].
Create Group

Add Group

1. Group Name
2. Limit groups to
   members (Leave blank to use group set max)
3. Save

Name the group by typing in the Group Name field [1]. If you want to limit groups to a specific size, enter the maximum number of group members in the Limit groups to field [2]. To save the group, click the Save button [3].

View Group

Search groups

Library Aides
0 users

View the group in your group set.

To create another group, click the Add Group button.
Profile & User Settings
How do I set a time zone in my user account as an admin?

All dates and times throughout Canvas are displayed according an account or course's respective time zone. However, you can set your own time zone for your user account and have your local time zone display throughout Canvas. Displaying dates in your local time may help you stay up to date on events, especially if the account or course time zone differs significantly from where you reside.

Note: If you set a time zone in your user settings, you can always view the course time zone by hovering over any date and time in Canvas. The text will show both the local time and course time.

Open User Settings

In Global Navigation, click the Account link [1], then click the Settings link [2].
Edit Settings

Click the Edit Settings button.

Set User Time Zone

In the Time Zone drop-down menu, select a new time zone for your user account.
Update Settings

Click the **Update Settings** button.

View Time Zone

**Andy Admin's Settings**

- **Full Name:** Andy Admin
  - This name will be used for grading.
- **Display Name:** Andy Admin
  - People will see this name in discussions, messages and comments.
- **Sortable Name:** Admin, Andy
  - This name appears in sorted lists.
- **Language:** System Default (English (US))
- **Time Zone:** Central Time (US & Canada)

View the time zone for your user account.
How do I set up multi-factor authentication for my user account as an admin?

Multi-factor authentication adds security to user accounts in your institution by asking each user to verify his or her user account. You can enable multi-factor authentication for your institution by contacting your Customer Success Manager. You can request to enable multi-factor authentication with one of three options: required for admins, required for all users, or optional for all users.

You must have a mobile device to set up multi-factor authentication for your user account. Your device must be able to send text (SMS) messages, or if you have a smartphone, you can download the Google Authenticator app for iPhone or Android.

Note: This lesson shows how to set up multi-factor authentication if it is an optional setting in your user account. However, if multi-factor authentication is required by your institution, you will be shown the multi-factor authentication page directly after you log in to Canvas.

Open User Settings

In Global Navigation, click the Account link [1], then click the Settings link [2].
Set Up Multi-Factor Authentication

Click the **Set Up Multi-Factor Authentication** button.

Verify via Google Authenticator

To verify multi-factor authentication with Google Authenticator, download the app for your device (iPhone or Android) [1]. Use the app to scan the QR code and generate a code. Enter the code in the **Verification Code** field [3].

If you want multi-factor authentication to remember the computer you are using to log in to Canvas, click the **Remember this computer** checkbox [4].
Click the **Verify** button [5].

### Verify via Text Message

Multi-factor Authentication

You are required to set up multi-factor authentication.

Multi-factor authentication increases security by requiring that you have something in your physical possession, in addition to knowing your password, in order to log in to Canvas. This can be a device that can generate verification codes, or a phone that can receive text messages. The Google Authenticator app for *iPhone* or *Android* can be configured by scanning the QR Code below. Other tokens can be configured by entering the secret key in another application. Once you have configured multi-factor authentication, it is recommended that you go to your profile page and print out a set of backup codes, in case your normal multi-factor device is unavailable.

Send text messages to **1234567890@email.net**

![QR Code](Image)

Please enter the verification code shown by your token.

**Verification Code:**

Remember this computer

To verify multi-factor authentication via text message, any existing SMS notification type displays in the drop-down menu [1]. This is the number where your multi-factor verification code will be sent. To select a new text (SMS) number, select the drop-down menu and enter the option to add a new phone number. You will need to know the phone number and mobile carrier (provider).

Once you have set up your new phone number, or selected an existing phone number, click the **Send** button [2]. Your mobile device will receive a verification code. Enter the code in the **Verification Code** field [3].

If you want multi-factor authentication to remember the computer you are using to log in to Canvas, click the **Remember this computer** checkbox [4].

Click the **Verify** button [5].
Manage Multi-Factor Authentication

Once multi-factor authentication is enabled, your User Settings page may display additional options to manage your authentication.

You can choose to create multi-factor authentication codes to use as backup in case your authentication device is not available [1]. This option is available to all users with multi-factor authentication.

If multi-factor authentication is optional for your account, you can also choose to reconfigure authentication [2] or disable authentication [3].
How do I manage new features in my user account as an admin?

Canvas is continually creating new features to improve your user experience. The majority of improvements will be made available as part of our regular release cycle. However, some features may affect your personal interaction with Canvas.

This lesson gives an overview of how to manage user-level feature options for your user account. You have no control over user-level features.

To view specific feature options available in Canvas, visit the user account features lesson.

Open User Settings

In Global Navigation, click the Account link [1], then click the Settings link [2].
View Feature Options

Feature Options

- High Contrast UI
- Underline Links beta

Available features will appear in the Feature Options section.

View Types of Features

Feature Options

- High Contrast UI
- Underline Links beta

High Contrast enhances the color contrast of the UI (text, buttons, etc.), making those items more distinct and easier to identify. Note: Institution branding will be disabled.

Each feature includes a feature description. To expand the feature box and display the description, click the arrow icon.

View Feature Tags

Feature Options

- High Contrast UI 1
- Underline Links beta 2
Feature tags help identify the state of each feature. A feature with no label [1] means the feature is stable and ready for use in your production environment. Features may also include a beta tag [2], which means the feature is available for use in your production environment but is still being tested for usability and accessibility behavior. Enabling a beta feature may create unintended behavior within your Canvas account.

Note: Occasionally features may include a Development tag, which means the feature is only available for testing in your beta environment; it is not available in your production environment. Not all institutions allow testing in beta environments.

View Feature Access

![Feature Options](image)

If a feature is displayed, you can choose to toggle the feature on or off.

**On** [1]: Click the toggle to turn on this feature in your user account. The toggle will turn green and show a checkmark.

**Off** [2]: By default, the feature will be off. Leave this button unselected if you do not want to enable this feature for your user account.
What feature options can I enable in my user account as an admin?

Canvas is continually creating new features to improve your user experience. The majority of improvements will be made available as part of our regular release cycle. However, some features may affect your personal interaction with Canvas. Learn more about User Feature Options and how to enable them in the [manage new features](#) lesson.

High Contrast UI

By default this feature is set to Off.

The High Contrast UI feature option allows you to view Canvas using high contrast styles. This feature enhances the color contrast of the user interface (text, buttons, etc.) so they are more distinct and easier to identify in Canvas. However, institutional branding is not supported when this feature is enabled, so you will not be able to view the institution's logo or other elements.

Underline Links

By default this feature is set to Off.

Underline Links displays hyperlinks in navigation menus, the Dashboard, and page sidebars as underlined text. This feature option does not apply to user-generated content links in the Rich Content Editor, which always underlines links for all users.
The **Underline Links** feature option allows you to view Canvas interface links as underlined text. When enabled, this feature underlines hyperlinks in navigation menus, the Dashboard, and page sidebars. This feature option does not apply to user-generated content links in the Rich Content Editor, which always underlines links for all users.

**Gradebook CSV Separator Preferences**

You can set how you want to view separators in Gradebook Export CSV files, depending on your locale or preference.

Separator options are managed through one of three feature options in User Settings. Currently, these options only apply to exporting Gradebook CSV files but may apply to other CSV files in a future release.

**Include Byte-Order Mark in Gradebook Exports**

The **Include Byte-Order Mark** feature option generates a specific set of three characters at the beginning of the CSV file. These characters, known as a byte-order mark, help some versions of Microsoft Excel understand that the CSV file is a UTF-8 encoded file. It also tells some localized versions of Excel that they should treat the incoming CSV file as if it were semicolon-separated by default. Because some versions of Excel do not understand or honor the byte-order mark, this feature allows all users to disable generation of this byte-order mark.

**Use Semicolons to Separate Fields in Gradebook Exports**

The **Use semicolons to separate fields** feature option generates CSV files with semicolons as the field separators instead of the default comma. When disabled, this feature falls back to behavior determined by the state of the Autodetect field separators option.
Note: This feature is automatically disabled if the Autodetect Field Separators option is enabled.

**Autodetect Field Separators in Gradebook Exports**

The **Autodetect field separators** feature option attempts to determine the appropriate field separator as indicated by the language set in the user’s account. For languages where the decimal separator is a dot, (e.g. 1,234.56), autodetection will choose a comma as the field separator. For languages where the decimal separator is a comma, (e.g. 1.234,56), autodetection will choose a semicolon as the field separator. For all other cases, autodetection will choose a comma as the field separator as a default.

Note: This feature is automatically disabled if the Use semicolons to separate fields option is enabled.
How do I change the language preference in my user account as an admin?

English is Canvas' language default, but you can choose to view the Canvas interface in another language.

Note: Instructors have the option to change the language preference for their courses. If you view a course where the instructor has made this change (most often for a foreign language course), the course language will override the language in your user settings.

Open User Settings

In Global Navigation, click the **Account** link [1], then click the **Settings** link [2].
Edit Settings

Click the **Edit Settings** button.

Select Language

In the Language drop-down menu, choose your preferred language.
Update Settings

Click the **Update Settings** button.

View Preferred Language

Andy Admin's Einstellungen

- **Vollständiger Name:** Andy Admin
  - Dieser Name wird von den Dozenten bei der Leistungsbewertung verwendet.
- **Name anzeigen:** Andy Admin
  - Andere Benutzer sehen diesen Namen in Diskussionen, Nachrichten und Kommentaren.
- **Sortierbarer Name:** Admin, Andy
  - Dieser Name wird in sortierten Listen angezeigt.
- **Sprache:** Deutsch
- **Zeitzone:** Mountain Standard Time (USA und Kanada)

Webdienste

Durch die Integration der Webtools, die Sie bereits nutzen, erleichtert Ihnen Canvas die Nutzung der Plattform erheblich. Klicken Sie auf einen beliebigen Webdienst unter "Andere Webdienste", um zu erfahren, was damit konkret gemeint ist.

View Canvas in your preferred language.
Question Banks
How do I manage question banks in an account?

After you create Question Banks in your account, you can delete, edit, and bookmark them as needed. Bookmarking a question bank allows users to quickly identify favorite or frequently used Question Banks.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Question Banks

In Account Navigation, click the Question Banks link.

Edit Question Bank

To change the name of the question bank, click the Edit icon [1].

To edit, add, or delete questions from the question bank, click the question bank name [2]
Bookmark Question Bank

Account Question Banks

**Design Questions**
6 Questions
Last Updated: Mar 23, 2016 at 12:34pm

Click the **Bookmark** icon. Question banks that are already bookmarked show a white x in the bookmark icon.

**View Bookmarked Banks**

To view bookmarked question banks, click the **View Bookmarked Banks** button.

Delete Question Bank

Account Question Banks

**Design Questions**
6 Questions
Last Updated: Mar 23, 2016 at 12:34pm

Click the **Delete** icon.
Confirm Deletion

Are you sure you want to delete this bank of questions?

[Cancel] [OK]

Click the OK button to delete the question bank.
How do I create a question bank in an account?

You can create questions banks for your institution or subaccount. Question banks are quiz question repositories that admins and instructors can access when creating a quiz. They make it easy to offer the same quiz questions to students in different courses.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Question Banks

In Account Navigation, click the **Question Banks** link.

Add Question Bank

Click the **Add Question Bank** button.
Add Bank Name

**Account Question Banks**

Bank Name: **No Name**

No Questions
Last Updated:

Type the name of the question bank in the **Bank Name** field. Press **Return** (on a Mac keyboard) or **Enter** (on a PC keyboard) to create the question bank.

Bookmark Question Bank

**Account Question Banks**

**New Bank**

No Questions
Last Updated: Jul 28 at 11:04am

To bookmark the question bank to your user account so you can view it when accessing other courses, click the **Bookmark** icon.
Open Question Bank

Account Question Banks

New Bank

No Questions
Last Updated: Jul 28 at 11:04am

Click the title of the question bank to open the bank of questions.

Add Content to Question Bank

New Bank

Remember, changes to question templates won’t automatically update quizzes that are already using those questions.

Show Question Details

Use the tools in the sidebar to add content to the question bank.
View the questions in your question bank. To view question details, click the **Show Question Details** checkbox.

**Note:** Question details are not available in question banks with more than 50 questions.
Roles and Permissions
What user roles and permissions are available in Canvas?

There are two types of users in Canvas: Account-level users and Course-level users.

Canvas comes with one default Account-level user role that includes permissions that affect the entire account as well as courses. Account admins can create account-level user roles with modified permissions. For more information about account-level permissions, view the Canvas Account Permissions PDF.

Canvas has five default Course-level user roles, each with permissions that affect their ability to interact with Canvas courses. Account admins can create course-level user roles. For more information about course-level user permissions, view the Canvas Course Permissions PDF.

You can also view a video about Canvas Permissions.

Course-Level Roles

Course-level roles are roles with permissions that allow a user course-level access. Usually users with these roles cannot see more than what is in their Canvas courses.
Canvas provides five base course-level user roles that each include their own set of default permissions. You can manage the permissions according to the needs of your institution. You can also create custom course roles that are created from a base role. The Canvas base roles are:

1. **Student**: These users are permitted to submit assignments. This permission should not be turned off for this role. Student permissions are restricted, but they have enough permissions to access and interact with course materials. You may also grant other permissions to students.

2. **TA**: These users have permissions similar to teachers except that TAs should not have access to SIS data. The TA role is meant to support the teacher role. Admins can manage TA permissions. For example, some institutions may permit TAs to grade student submissions.

3. **Teacher**: The teacher role grants a user course admin permissions, giving them control over their assigned course or courses. However, institutions can revise and limit these permissions as needed, depending upon the needs of your institution.

4. **Designer**: These users are permitted to access and create course content, including announcements, assignments, discussions, and quizzes. Designer access to student information will vary from institution to institution. However, Designers cannot access grades. If your institution does not use Course Designers, you may choose to use this role as another TA user role that has more permissions than a regular TA.

5. **Observer**: This user role can be linked to a student user enrolled in a course. For example, parents, guardians, and/or mentors may wish to be linked to a student to view their course progress. Observers usually have the fewest permissions.

**Note**: All user permissions trickle down through an account. Additionally, all permissions modifications affect all users assigned to a role. You may need to create a custom course-level user role for users whose course-level permissions you would like to vary from others'.
Account-Level Roles

Account admins have the power to set permissions for all users in Canvas. Admins can create additional account-level roles with account-level permissions. The default permissions for account admins can include access to everything within the account, plus the ability to masquerade as a user.

Each sub-account has its own permissions page, so admins can create account-level roles within a sub-account and add sub-account permissions directly within the sub-account. Sub-account admins can only manage permissions and settings for the sub-accounts to which they’ve been assigned. However, some permissions may not be available for sub-account users. To learn more, view the Account vs. Sub-Account Comparisons PDF.
How do I manage the Permissions page?

As an admin, you can review and manage permissions for course-level and account-level user roles. Depending on the user role, you may want to edit default permissions and set custom permissions for a user role in your account. Permissions grant or deny access to specific features within an account and course.

**Note:** Some permissions may not be available for sub-accounts. To learn more about sub-account permissions and limitations, view the [Account vs. Sub-Account Comparisons PDF](#).

Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open Permissions

In Account Navigation, click the Permissions link.

View Permissions

By default, the permissions page displays course-level user role permissions [1].

To view account-level user role permissions, click the Account Roles tab [2].
Search and Filter Permissions

To search for a specific permission, type a permission name in the Search field [1]. The search field uses predictive filtering.

You can also filter permissions by role. By default, the Permissions page displays all user roles. To filter permissions for a specific user role, type or select the name of the user role from the Permission Role Filter menu [2].

You can use the search and filter options to search permissions for specific user roles.
# View Individual Permission

<table>
<thead>
<tr>
<th>Permissions</th>
<th>Student</th>
<th>Teacher</th>
<th>Student TA</th>
<th>TA</th>
<th>Designer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alerts - add / edit / delete</td>
<td>☒</td>
<td>☑</td>
<td>☑</td>
<td>☒</td>
<td>☒</td>
</tr>
<tr>
<td>Analytics - view pages</td>
<td>☒</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☒</td>
</tr>
<tr>
<td>Announcements - view</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Assignments and Quizzes - add / edit / delete</td>
<td>☒</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Conversations - send messages to entire class</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Conversations - send messages to individual course members</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Course Calendar - add / edit / delete events</td>
<td>☒</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
</tbody>
</table>

To view information about a specific permission, click the permission name.
View Additional Permission Details

The permission sidebar displays the permission name [1].

View and collapse specific details about the permission by clicking the What it Does and Additional Considerations arrow icons [2]. Please note some permissions may not include these details.

The sidebar also displays the Assigned Roles section [3], which shows all enabled roles for the permission, and the Unassigned Roles section [4], which shows all disabled roles for the permission.
Manage Individual Permission

To manage user roles for the permission, click the icon next to the name of a user role [1]. In the permission menu [2], the existing permission is indicated by a check mark.

Choose the new permission status by clicking one of the permission options: Enable, Enable and Lock, Disable, Disable and Lock, and Use Default. Locked options keep the setting from being changed by subaccount admins in a lower account. The new permission status is saved automatically.

Note: If a permission icon does not display as opaque, you cannot change the permission [3].
View and Manage Individual User Role Permissions

To view all permissions assigned to a specific role, click the role name [1]. You can manage permissions for account-level roles and manage permissions for course-level roles.

To add an account-level role or add a course-level role, view the tab for the appropriate role and click the Add Role button [2].
How do I add an account-level role in the Permissions page?

You can create account-level roles in Canvas.

Account roles are granted to each Canvas admin and define the type of access each admin has in the account. You can create custom account-level roles depending on the needs of your institution.

Once a role is created, you can add administrative users and manage account-level permissions.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Permissions

In Account Navigation, click the Permissions link.

Open Account Roles

Click the Account Roles tab.

Add Role

Click the Add Role button.
Add Role Name

New Account Role

Role Name: 

In the Role Name field, type the name of the new role.

Save Role

Click the Save button.
**View Account Role**

<table>
<thead>
<tr>
<th>Course Roles</th>
<th>Account Roles</th>
</tr>
</thead>
</table>

**Permissions**

<table>
<thead>
<tr>
<th>Permissions</th>
<th>Analytics Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account-level settings - manage</td>
<td>✗</td>
</tr>
<tr>
<td>Admins - add / remove</td>
<td>✗</td>
</tr>
</tbody>
</table>

View the new account-level role.
How do I set permissions for an account-level role?

After you have [created an account-level role](#), you can review the default permissions set by each account-level role. Permissions grant or deny access to specific features within an account and course and are applied to any user granted a specific account-level role. Learn how to [add an administrative user to an account](#).

Depending on the role, you may want to override the defaults to create custom permissions.

To learn more about account permissions, view the [Account Permissions PDF](#).

**Note:** Some permissions may not be available for sub-accounts. To learn more about sub-account permissions and limitations, view the [Account vs. Sub-Account Comparisons PDF](#).

Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open Permissions

Courses
People
Statistics
Permissions
Outcomes
Rubrics
Grading
Question Banks

In Account Navigation, click the Permissions link.

Open Account Roles

Course Roles
Account Roles

Click the Account Roles tab.
Manage Permissions

To override any permissions, locate the name of the user role [1]. Click the icon next to the name of a permission [2]. In the permission menu [3], the existing permission is indicated by a check mark.

Choose the new permission by clicking one of the permission options: Enable, Enable and Lock, Disable, Disable and Lock, and Use Default. Locked options keep the setting from being changed by subaccount admins in a lower account. The new permission status is saved automatically.

**Note:** If a permission icon does not display as opaque, you cannot change the permission [4].
View User Role Permissions

To view permissions for an individual user role, click the role name [1].

In the sidebar, you can view the role name [2], the time or date that permissions for the user role were last changed [3], and the user’s assigned and unassigned permissions [4].
Manage User Role Permissions

To manage user permissions from the sidebar, Click the icon next to the name of a permission [1]. In the permission menu [2], the existing permission is indicated by a check mark.

Choose the new permission by clicking one of the permission options: Enable, Enable and Lock, Disable, Disable and Lock, and Use Default. Locked options keep the setting from being changed by subaccount admins in a lower account. The new permission status is saved automatically.

Note: If a permission icon does not display as opaque, you cannot change the permission [3].
Edit User Role

Instructor Admin

Role Name
Instructor Admin

Last changed: Jul 14, 2018

To edit the name of the user role, click the Edit icon [1]. Edit the name of the user role [2], then click the Back arrow [3].
Delete User Role

To delete a user role, click the Delete icon [1]. Review the warning about user roles—any users with the role you are deleting will keep the current permissions, but no new users can be created with the user role.

Deleting a user role cannot be undone.

To confirm deletion of the user role, click the Ok button.
How do I add a course-level role in the Permissions page?

You can create course-level roles in Canvas. Course roles are granted to each Canvas user and define the type of access each user has in the course. Default roles include student, teacher (instructor), teacher assistant (TA), designer, and observer, but you can also create custom course-level roles depending on the needs of your institution.

Once a role is created, you can manage course-level permissions.

**Note:** When a user receives an enrollment invitation for a course role, the invitation displays the name of the base role.

Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open Permissions

In Account Navigation, click the Permissions link.

Add Role

In the Course Roles tab, click the Add Role button.
Add Role Name

In the Role Name field, type the name of the new role.

Select User Type

In the Base Type field, select the type of user you want to apply to the role. You can choose from student, teacher, TA, designer, or observer.
The base role you select will determine the default permissions for the new user role.

**Save Role**

Click the **Save** button.

**View Course Role**

View the new course-level role.
How do I set permissions for a course-level role in an account?

After you have created a course-level role, you can review the default permissions set by each course-level role. Permissions grant or deny access to specific features within a course and are applied to any user granted a specific course-level role. Users are added to a course role when they are manually enrolled in the course or via SIS import.

Depending on the role, you may want to override the defaults to create custom permissions.

To learn more about course permissions, view the Course Permissions PDF.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Permissions

In Account Navigation, click the Permissions link.
Manage Permissions

In the Course Roles tab, locate the name of the user role [1]. Click the icon next to the name of a permission [2]. In the permission menu [3], the existing permission is indicated by a check mark.

Choose the new permission by clicking one of the permission options: Enable, Enable and Lock, Disable, Disable and Lock, and Use Default. Locked options keep the setting from being changed by subaccount admins in a lower account. The new permission status is saved automatically.

Note: If a permission icon does not display as opaque, you cannot change the permission [4].
View User Role Permissions

To view permissions for an individual user role, click the role name [1].

In the sidebar, you can view the role name [2]. If the user role is a custom role, you can also view the base role.

The sidebar also displays the time or date that permissions for the user role were last changed [3], and the user’s assigned and unassigned permissions [4].
Manage User Role Permissions

To manage user permissions from the sidebar, click the icon next to the name of a permission [1]. In the permission menu [2], the existing permission is indicated by a check mark.

Choose the new permission by clicking one of the permission options: Enable, Enable and Lock, Disable, Disable and Lock, and Use Default. Locked options keep the setting from being changed by subaccount admins in a lower account. The new permission status is saved automatically.

Note: If a permission icon does not display as opaque, you cannot change the permission.
Edit User Role

If you have created a custom user role, you can edit the name of the user role if needed by clicking the **Edit** icon [1]. Edit the name of the user role [2], then click the **Back** arrow [3].

**Note:** Base roles cannot be edited.
Delete User Role

If you have created a custom role, you can delete the user role by clicking the Delete icon [1]. Review the warning about user roles—you will not be able to create new users with this role.

Deleting a user role cannot be undone.

To confirm deletion of the user role, click the Ok button.

Note: Base roles cannot be deleted.
Rubrics
How do I manage rubrics in an account?

You can create rubrics for instructors to use across your institution. Instructors can add account-level rubrics to their assignments, graded discussions, and quizzes. Instructors can also create their own rubrics in their courses.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Rubrics

In Account Navigation, click the Rubrics link.

Add Rubric

Click the Add Rubric button.
Add details to the rubric.
Manage Existing Rubric

<table>
<thead>
<tr>
<th>Assignments</th>
<th>4 criteria</th>
<th>20 points possible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discussion Rubric</td>
<td>4 criteria</td>
<td>15 points possible</td>
</tr>
<tr>
<td><strong>Essay Feedback</strong></td>
<td>3 criteria</td>
<td>45 points possible</td>
</tr>
<tr>
<td>Life Sciences Rubric</td>
<td>1 criterion</td>
<td>5 points possible</td>
</tr>
<tr>
<td>Writing Prompt</td>
<td>5 criteria</td>
<td>25 points possible</td>
</tr>
<tr>
<td>Writing Prompt Rubric</td>
<td>6 criteria</td>
<td>30 points possible</td>
</tr>
</tbody>
</table>

Click the name of the rubric you want to edit or delete.

**Note:** Rubrics that have been used in more than one place cannot be modified.
## Edit Rubric

### Essay Feedback

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Ratings</th>
<th>Pts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 pts</td>
<td>8 pts</td>
<td>10  pts</td>
</tr>
<tr>
<td>Exceeds expectations</td>
<td>Meets expectations</td>
<td></td>
</tr>
<tr>
<td>6 pts</td>
<td>0 pts</td>
<td></td>
</tr>
<tr>
<td>Great start</td>
<td>No Marks</td>
<td>10  pts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Argument</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20 pts</td>
<td>12 pts</td>
<td>20  pts</td>
</tr>
<tr>
<td>Full Marks</td>
<td>Great start</td>
<td></td>
</tr>
<tr>
<td>0 pts</td>
<td>0 pts</td>
<td></td>
</tr>
<tr>
<td>No Marks</td>
<td>No Marks</td>
<td>20  pts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Continuity of Ideas</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 pts</td>
<td>9 pts</td>
<td>15  pts</td>
</tr>
<tr>
<td>Full Marks</td>
<td>Great start</td>
<td></td>
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<td></td>
<td>0 pts</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No Marks</td>
<td>15  pts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Points:</strong> 45</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To edit your rubric, click the **Edit Rubric** button.
Edit Rubric Details

To edit the rubric title, select the **Title** field [1].

To delete the rubric, click the **Delete** icon [2].

To edit a criterion description, click the **Edit** icon in the Criteria field [3]. To delete a criterion, click the **Delete** icon in the Criteria field [4].

To edit a rating, click the **Edit** icon in the desired rating field [5]. To add a new rating for the criterion, click the **Add** icon [6].

To change the point value for a criterion, select the **Points** field and type a new point value [7].

To add a new criterion, click the **Add Criterion** link [8]. To add an outcome to your rubric, click the **Find Outcome** link [9].
Update Rubric

To save any edits you've made to the rubric, click the **Update Rubric** button.

Delete Rubric

Click the **Delete Rubric** button.
Confirm Deletion

Are you sure you want to delete this rubric? Any course currently associated with this rubric will still have access to it, but, no new courses will be able to use it.

Click the **OK** button.

When you delete a rubric, any course currently using the rubric will still have access to the rubric, but it will no longer be included in new courses.
How do I add a rubric in an account?

You can create rubrics for instructors to use across your institution. Instructors can add account-level rubrics to their assignments, graded discussions, and quizzes. Instructors can also create their own rubrics in their courses.

Rubric criteria can include a point range or an individual point value. Rubrics can also be set as non-scoring rubrics, which allows for the use of rubrics without point values.

Notes:

- Currently criterion cannot be reordered after they are added to a rubric.
- The option to create a range is currently managed by the Rubric Criterion Range feature option, which can be enabled at the account level. To enable this feature, learn how to manage feature options in the account features lesson.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Rubrics

In Account Navigation, click the Rubrics link.

Add Rubric

Click the Add Rubric button.
Add Title

In the **Title** field, add a title for the rubric. This title helps instructors identify the rubric so they can associate it with an assignment, graded discussion, or quiz.

**Edit Criterion Description**

The rubric includes one default criterion entry. To edit the criterion description, click the **Edit** icon.

The rubric includes one default criterion entry. To edit the criterion description, click the **Edit** icon.
Note: Currently criterion cannot be reordered after they are added to a rubric. If you want to display criterion in a specific order, make sure you create them in the order that you prefer.

Enter Descriptions

Edit Criterion

1. Description
   Description of criterion

2. Long Description

3. Update Criterion

Enter a short description for the criterion in the Description field [1]. To add a longer description to the criterion, enter a longer description [2]. The longer description provides students more information about the criterion. Click the Update Criterion button [3].
Rubric ratings default to 5 points, awarding 5 points for full rubric marks and 0 points for no rubric marks.

If you want to adjust the total point value of the criterion, enter the number of points in the Points field [1]. The first rating (full marks) updates to the new total point value and any incremental ratings adjust appropriately [2].
Select Range

By default, rubric ratings are created as individual point values. If you want to create a point range instead, click the **Range** checkbox [1]. Ranges allow you to assign a rating for a range of point options instead of just one point value.

When enabled, the first rating (full marks) shows the total point value in a range format [2]. Each rating displays a maximum and minimum point value. For each rating, the maximum value is assigned as the point value.

Except for the range value display, criterion ranges function the same way as individual point ratings. For instance, a range that includes a maximum of five points and a minimum of three points is assigned the full point value of five points.
Add Ratings

To add a new rating for the criterion, click the Add icon.
Update Rating

In the Edit Rating window, complete the rating criterion description.

By default, the new rating points field displays the point value between the two existing ranges [1]. To change the point value for the rating score, enter the new point value in the Rating Score field. Points can be whole (1, 5, 10) or decimal (0.3, 0.5, 2.75) numbers.

In the Rating Title field [2], enter a title for the rating.

In the Rating Description field [3], enter a description for the rating.

Click the **Update Rating** button [4].
Update Range Rating

When ranges are enabled, the Rating Score field displays the point value between the two existing ranges. To change the point value for the rating score, enter the new point value in the Rating Score fields.

Point values for range ratings should be whole numbers.
Manage Criterion

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Ratings</th>
<th>Pts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ideas and Content Ideas and content include the essay's main idea and supporting details. Range □</td>
<td>10 pts Full Marks</td>
<td>-</td>
</tr>
<tr>
<td>Student shows proficiency in this area but needs improvement and continued practice to achieve mastery.</td>
<td>5 pts Proficient</td>
<td>10 pts No Marks</td>
</tr>
<tr>
<td>0 pts No Marks</td>
<td>0 pts No Marks</td>
<td>-</td>
</tr>
</tbody>
</table>

Total Points: 10

To edit a rating, click the **Edit** icon [1]. Editing a specific rating value affects the full point value for the criterion. If you adjust the point value of a rating, the value of all ratings will adjust and create the updated point value for the criterion.

To delete a rating, click the rating's **Delete** icon [2]. Note that you cannot delete the first and last rating for the criterion.

To delete the entire criterion, click the criterion **Delete** icon [3].
Add Criterion

To add another criterion, click the Add Criterion link [1]. To create a new criterion, click the New Criterion option [2]. To duplicate an existing criterion, click the name of the criterion you want to duplicate [3].

To find an outcome to align with the rubric, click the Find Outcome link [4].

Note: Outcomes cannot be edited directly in a rubric.

Create Rubric

Click the Create Rubric button.
View Rubric

<table>
<thead>
<tr>
<th>Essay Rubric</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Criteria</strong></td>
</tr>
<tr>
<td>Ideas and Content</td>
</tr>
<tr>
<td>Ideas and content include the essay’s main idea and supporting details.</td>
</tr>
<tr>
<td>Organization</td>
</tr>
<tr>
<td>Organization describes the introduction, body, and conclusion of an essay and determines how well these parts fit together.</td>
</tr>
</tbody>
</table>

Total Points: 15

View the new rubric.

To edit the rubric, click the Edit icon [1]. To delete the rubric, click the Delete icon [2].
How do I align an outcome with a rubric in an account?

You can align any outcome in your account to a rubric. Rubrics are used to help students understand expectations for an assignment and how their submissions will be graded. Outcomes can be aligned with a rubric for additional assessment and measurable performance.

To align an outcome, the outcome must already exist for your account. Learn how to create account outcomes.

Notes:

- Outcomes can be added to rubrics, but rubrics cannot be added to outcomes.
- Rubrics cannot be edited once they have been added to more than one assignment in a course.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Rubrics

In Account Navigation, click the Rubrics link.
Open Rubric

Account Rubrics

Assignments
4 criteria
20 points possible

Discussion Rubric
4 criteria
15 points possible

Essay Rubric
2 criteria
15 points possible

Life Sciences Rubric
1 criterion
5 points possible

Some Rubric
1 criterion
5 points possible

Writing Prompt
5 criteria
25 points possible

Writing Prompt Rubric
6 criteria
30 points possible

Click the name of a rubric.

Create Rubric

To create a new rubric, click the Add Rubric button.
## Essay Rubric

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Ratings</th>
<th>Pts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ideas and Content</td>
<td>10.0 to &gt;5.0 pts Full Marks</td>
<td></td>
</tr>
<tr>
<td>Ideas and content include the essay's main idea and supporting details.</td>
<td>5.0 to &gt;3.0 pts Proficient Essay Includes a main idea with general or limited supporting details.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.0 to &gt;0 pts No Marks</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10.0 pts</td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td>5.0 pts Full Marks</td>
<td></td>
</tr>
<tr>
<td>Organization describes the introduction, body, and conclusion of an essay and determines how well these parts fit together.</td>
<td>0.0 pts No Marks</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.0 pts</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total Points: 15.0</td>
<td></td>
</tr>
</tbody>
</table>

Click the **Edit Rubric** button.
Click the Find Outcome link.
Import Outcome

Locate and select the outcome you want to align [1]. If you want to use the criterion for scoring, click the Use this criterion for scoring checkbox [2]. Click the Import button [3].

Note: Available outcomes may vary by institution.

Confirm Import

Import outcome "Writing Prompt Outcome" to group "Documentation"?

Click the OK button.
View the aligned outcome [1]. Click the **Update Rubric** button [2].
How do I customize learning mastery ratings for an account?

You can customize the Learning Mastery ratings for the Learning Mastery Gradebook and Student Learning Mastery Gradebook. You can customize the set level for mastery, name and point value for proficiency ratings, and the color associated with each rating.

Assigned colors also display in rubric results within a student's Grades page. Even if students do not have access to the Student Learning Mastery Gradebook, the Grades page uses color to help students more easily recognize their own results within an assignment.

Customized Learning Mastery ratings apply to rubric criteria, not just outcomes criteria. When a rubric is used to assess a student, the selected criterion ratings match the point value or range in an outcomes proficiency rating and display the same color results. For instance, if the Exceeds Mastery proficiency rating is set to 5 points and indicated by the color green, a course rubric criterion with a rating of 5 points awarded to a student also displays the color green.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Rubrics

In Account Navigation, click the Rubrics link.

Open Learning Mastery

Click the Learning Mastery tab.
# View Learning Mastery

<table>
<thead>
<tr>
<th>Mastery</th>
<th>Proficiency Rating</th>
<th>Points</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Exceeds Mastery</td>
<td>4</td>
<td><img src="green.png" alt="Green" /> Change</td>
</tr>
<tr>
<td>Mastery</td>
<td>Mastery</td>
<td>3</td>
<td><img src="light_green.png" alt="Light Green" /> Change</td>
</tr>
<tr>
<td>Near Mastery</td>
<td></td>
<td>2</td>
<td><img src="yellow.png" alt="Yellow" /> Change</td>
</tr>
<tr>
<td>Below Mastery</td>
<td></td>
<td>1</td>
<td><img src="orange.png" alt="Orange" /> Change</td>
</tr>
<tr>
<td>Well Below Mastery</td>
<td></td>
<td>0</td>
<td><img src="red.png" alt="Red" /> Change</td>
</tr>
</tbody>
</table>

The Learning Mastery tab defaults to five rows, each with a learning mastery option (as noted from top to bottom):

- Proficiency Rating Identifiers: Exceeds Mastery, Mastery, Near Mastery, Below Mastery, Well Below Mastery
- Points: 4, 3, 2, 1, 0
- Colors: Dark green, light green, yellow, orange, red

Mastery is set in the second row.
Customize Learning Mastery

To set the mastery level, select the desired option in the Mastery column [1].

To change the name of a proficiency rating, select the rating name field and type the new name [2].

To change the point value associated with a proficiency rating, select the Points field and type the desired point value [3].
Customize Rating Color

To change the color associated with a proficiency rating, locate the rating and click the Change link. You can select a default color option [1] or enter a hex color code [2].

To save the selected color, click the Apply button [3].

Add Rating

To add a proficiency rating, click the Add button [1].

A new rating row displays at the bottom of the list with 0 points [2]. Customize the ratings as necessary.

You can add as many ratings as needed for your institution.
Delete Rating

To delete a proficiency rating, click the **Delete** icon.

Save Learning Mastery

To save your changes, click the **Save Learning Mastery** button.
Settings
How do I use account settings?

As an admin, you can use your account settings to manage settings for your entire institution. Depending on your permissions, you can edit differing levels of the account settings.

View a [video about Account Settings](#).

**Note:** In sub-accounts, not all account settings may be available.

Open Account

In Global Navigation, click the **Admin** link [1], then click the name of the account [2].
Open Settings

The settings portion of your account is only available to Canvas admins.

In Account Navigation, click the Settings link.
View Settings

In the Account Settings tab, you can specify settings for the entire account. This tab includes several sections that you can manage including Account Settings, IP Address Filters, Features, Global JavaScript and CSS, Custom Help Links, Enabled Web Services, and permissions for who can create new courses.
In the Quotas tab, you can set default account quotas for courses, users, and groups [1]. You can also set quotas by Course ID or Group ID [2].
View Notifications

In the Notifications tab, you can change the settings for email notifications. You can choose to keep the default Canvas setting or change the Email Notification "From" Name for Canvas notifications. This custom text can be your institution name or whatever sender information you would like to use. Using the custom text field helps student identify notification emails more easily and improves the quality of student-instructor interaction.

You can also warn users about notifications sent to external services; adding a non-institution based email address may result in the exposure of sensitive content.

**Note:** Only root account admins can configure notification settings for an account. The Notifications tab is not available in sub-accounts.
View Admins

In the Admins tab, you can view and edit the admins assigned to this account. If you are working with sub-accounts, admin privileges are limited to the scope of just that sub-account and below. Learn how to add an administrative user to your account.
View Announcements

Global Announcements

Labor Day

Campus will be closed Monday, September 5th for Labor Day.

This is a message for [Documentation Canvas]

from Aug 22, 2016 at 12am to Sep 2, 2016 at 12am

Send only to the following types of users: (If none are selected, send to everyone in the entire account)
- Student
- Student TA
- Teacher
- TA
- Account Admin
- Analytics Manager
- Test admin

In the Announcements tab, you can send out global announcements to every user in that account. These announcements are used to announce events such as building closures, class cancelations, holidays, etc. Learn more about global announcements.
View Reports

The Reports tab is where custom reports will appear after you design them. There are many more reports available in Canvas, they just aren't listed on this page. They are available in context. Quiz reports, for example, are available from the quiz page itself. User reports are available on the user's profile page.
View Apps

If your institution has enabled the Canvas App Center, in the Apps tab you can view all available external learning tools in Canvas. However, you can also configure apps manually.

External learning tools are often developed as LTI integrations. These tools may be published along with a textbook, and access to these tools is often restricted to students in the course. Any LTI provider should be able to give you the information you need to configure the tool in Canvas. Once configured here at the account level, it is available to any course designer or instructor in the account.
### View Feature Options

The **Feature Options** tab displays new features that are available to your account on both the account and course levels. Features can be turned on for the entire account, turned off for the entire account, or allowed so instructors can decide whether or not to use the feature. Instructors can enable course-allowed features on a course-by-course basis.

<table>
<thead>
<tr>
<th>Feature Options</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duplicate Modules</td>
<td>Off</td>
</tr>
<tr>
<td>Enable new SIS integration settings</td>
<td>Off</td>
</tr>
<tr>
<td>Account Course and User Search</td>
<td>Off</td>
</tr>
<tr>
<td>HTML5 Media Recorder in RCE</td>
<td>On</td>
</tr>
<tr>
<td>LOR External Tools</td>
<td>Allowed</td>
</tr>
<tr>
<td>Public Course Index</td>
<td>Allowed</td>
</tr>
</tbody>
</table>
View Security

Canvas Content Security Policy

The Content Security Policy allows you to restrict custom JavaScript that runs in your instance of Canvas. You can manually add up to 50 domains to your whitelist. Wild cards are recommended (e.g. *.instructure.com). Canvas and Instructure domains are included automatically and do not count against your 50 domain limit.

Enable Content Security Policy

Whitelist (1/50)

Domain Name

http://somedomain.com

Domain Name

*.jsfiddle.net

The Security tab is where the Content Security Policy can be managed. You can enable or disable the Content Security Policy and add or remove domain names from the Domain Name Whitelist.
How do I set details for an account?

As an admin, the Account Settings tab contains multiple settings you can control and change in your Canvas account.

Not all settings and options are available to sub-account admins. The following restrictions apply to sub-account admins:

- Sub-account admins cannot manage the following account options and restriction settings: Default Time Zone, Allow Self-Enrollment, Login Label, Trusted HTTP referrers, Don't let teachers rename their courses, Students can opt-in to receiving scores in email notifications, and Restrict students from viewing quiz questions after course end date.
- Sub-account admins can only enable Equella, Turnitin, Analytics, and User Avatars.
- Sub-account admins cannot customize links for the help dialog box by default.
- Sub-account admins cannot enable web services by default.
- Sub-account admins cannot choose who can create new courses by default.

Notes:

- Not all settings options are available for sub-accounts.
- This lesson indicates the settings that you can manage for your entire account. Other integrations may be available with the assistance of your Customer Success Manager. For a full list of integrations available in Canvas, please view the [Canvas integrations lesson](#).
Open Account

Click the Admin link [1], then click the name of the account [2].
Open Settings

In Account Navigation, click the Settings link.

View Settings

Account Settings defaults to the Settings tab. Here you can view all the details available to you in your account.
View Account Settings

The Account Settings section allows you to specify settings for the entire account, including account name [1], default language [2], default time zone [3], and self-enrollment [4].

You can also specify trusted URLs at the root account [5]. This option allows accounts to have custom login pages hosted on different domains but still keep the authenticity token.

You can set a default view for the Dashboard using the Default View for Dashboard drop-down menu [6]. Default options include Recent Activity, List View, and Card View. The setting defaults to the Card View. Specifying a default view applies to all new account users. Once a user has selected a different view, the default no longer applies. If you want to apply the selected default view to all users in the account, select the Overwrite all users’ existing default dashboard preferences checkbox [7]. However, users can change their dashboard view at any time in the dashboard options menu.
View Restriction Settings

1. Don’t let teachers rename their courses
2. Students can opt-in to receiving scores in email notifications
3. Restrict students from viewing quiz questions after course end date
   - Restrict students from accessing courses before start date
4. Lock this setting for sub-accounts and courses
5. Restrict students from accessing courses after end date
   - Lock this setting for sub-accounts and courses
6. Disable comments on announcements
   - Lock this setting for sub-accounts and courses
7. Allow students to download course content and view offline

You can also manage five restriction settings for the entire account.

If you don’t want teachers to be able to rename their courses, select the Don’t let teachers rename their courses checkbox [1].

To allow students to opt-in to receive scores as part of grading notifications, select the Students can opt-in to receiving scores in email notifications checkbox [2]. When this option is enabled, the user’s notification preferences page displays an opt-in checkbox in the Course Activities Grading section. If you enable this option but disable it at a later time, the checkbox will be removed from the notifications page, and anyone who has opted in will no longer receive scores in grading notifications.

If you don’t want students to be able to view quiz questions after their course has concluded, click the Restrict students from viewing quiz questions after course end date checkbox [3].

You can choose to restrict student access to view courses before the course start and/or end dates [4]. You can select up to four access settings.

You can also disable comments on announcements in all courses [5].

To allow students to download course content to view offline, select the Allow students to download course content and view offline checkbox [6].
View Quiz IP Address Filters

The Quiz IP Address filter allows an admin to create a predefined list of IP addresses or address ranges, making it easier for instructors to select a valid setting when creating a quiz. Since this is often used by an organization to limit tests to an on-campus testing center, it is recommended that you use a descriptive name that associates your filter with that location.

Filters can be a comma-separated list of addresses, or an address followed by a mask (i.e., 192.168.217.1/24 or 192.168.217.1/255.255.255.0). For more information on these masks, view the IP Filtering in Canvas PDF.

View Features

1. Let sub-accounts use the Theme Editor to customize their own branding
2. Open Registration
3. Users can edit their name
4. Users can delete their institution-assigned email address
5. Show the email address of sender for user interaction Notifications
6. Equella
7. Analytics
8. User Avatars
9. Enable Gravatar
The Features section lets you enable or disable specific built-in Canvas functionality.

To allow sub-accounts to use the Theme Editor, select the Let sub-accounts use the Theme Editor to customize their own branding checkbox [1].

To allow users to be added to a course via email address without already having a Canvas user account, select the Open Registration checkbox [2].

To allow users to edit their name as part of their user account settings, select the Users can edit their name checkbox [3].

To allow users to delete the institution-added email address in their user accounts and use a personal email address, select the Users can delete their institution-assigned email address checkbox [4]. If this feature is selected, also consider enabling the non-institutional email notification.

To allow users to view the email address of the sender as part of external notifications, such as the email for a user who sent a message in Conversations, select the Show the email address of sender for user interaction Notifications checkbox [5].

To allow users to integrate content with Equella, select the Equella checkbox [6].

To enable analytics for the account, select the Analytics checkbox [7].

To allow users to upload a profile picture in their user accounts, select the User Avatars checkbox [8]. When this feature is enabled, you can manage profile pictures for all users. This feature is independent of the Profiles feature, which must be enabled by a Customer Success Manager.

When the User Avatars checkbox is selected, the Enable Gravatar checkbox is also selected by default [9]. A Gravatar is a globally recognized avatar associated for a user in any website that supports Gravatars. When Gravatars are enabled in an account, users can import their Gravatar when selecting a profile picture in their user settings page. Gravatars are associated with the user’s Gravatar email address. When Gravatars are disabled, the From Gravatar tab is not included as an option in the Select Profile Picture window.
View SIS Grade Export Settings

1. SIS Grade Export Settings

   - "Sync Grades to SIS" checkbox is enabled by default for assignments, graded discussions, and quizzes
   - Lock this setting for sub-accounts

2. SIS Integration Settings

   If you wish, you can rename "SIS" to something more familiar to your staff

   SIS friendly name

   - SIS imports
   - SIS syncing
     - Lock this setting for sub-accounts
     - Default SIS Sync for assignments, quizzes, grade discussion
     - Require assignment due date
     - Limit assignment names lengths (max 255)

If you've integrated your account with a student information system (SIS), depending on your institution's configuration, you can either configure SIS submissions for your entire account [1] or manage SIS integration settings [2].
View Help Menu Options

As an account admin, you can customize the Help menu that appears in Canvas for all users. You can also add custom help links for your institution and have them display to all or specific user roles.

View Similarity Detection Platform

The Similarity Detection Platform section displays for all accounts and is used for plagiarism LTI tool integrations.
If your account has installed at least one plagiarism LTI tool, any content you include in the Similarity Pledge text field will display to students [1]. Similarity pledges require students to check a box acknowledging they agree with the pledge information, which usually asks them to verify their work is their own and that any sources have been properly cited.

You can also set the originality score default for the entire account in the Students can see originality score drop-down menu [2]. You can set the report to generate immediately upon assignment submission, after an assignment is graded, after an assignment due date, or never. The account default is not required and can be changed at any other level. Subaccounts can set a separate default from the account, and individual assignments within a course can set their own originality preferences as well.

**View Web Services**

<table>
<thead>
<tr>
<th>Enabled Web Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Delicious</td>
</tr>
<tr>
<td>☣ Diigo</td>
</tr>
<tr>
<td>✓ Google Docs Preview</td>
</tr>
<tr>
<td>✓ Google Drive</td>
</tr>
<tr>
<td>✓ LinkedIn</td>
</tr>
<tr>
<td>✓ Skype</td>
</tr>
<tr>
<td>✓ Twitter</td>
</tr>
</tbody>
</table>

The Enabled Web Services section is where you enable third-party integrations. These integrations can be used to extend the functionality of a user's Canvas profile. For example, when a user connects their Twitter account to their Canvas user profile, Canvas can send that user private Twitter messages about new assignments, quizzes, messages, etc. This is all configurable in the user's Notification Preferences.

**Note:** If you enable the Google Apps LTI for your entire institution, you do not need to enable the Google Drive web service for your students.
View Who Can Create New Courses

Who Can Create New Courses

(Account Administrators can always create courses)

☑️ Teachers

☐ Users with no enrollments

☐ Students

You can choose who can create new courses within your account.

This setting allows the selected user(s) to create new course shells by clicking the Create a New Course button in the Dashboard and the Copy this Course button in Course Settings.

Courses created from the Dashboard are added to the manually-created courses subaccount.

Copied courses are added to the same subaccount as the course that was copied.

Update Settings

Click the Update Settings button.
How do I set storage quotas for an account?

In the Quotas tab, you can set default account quotas for courses, users, and groups. You can also set quotas by Course ID or Group ID.

You can view the total number of files used across the entire account in account statistics.

Note: Sub-account admins cannot manage user quotas.

Open Account

Click the Admin link [1], then click the name of the account [2].
Open Settings

SIS Import
Themes
Developer Keys
Canvas Data Portal
Canvas Parent Tools
Admin Tools

Settings

The settings portion of your account is only available to Canvas admins.

In Account Navigation, click the Settings link.

Open Quotas

Settings  Quotas  Notifications  Admins  Announcements  Reports  Apps  Feature Options  Security

Click the Quotas tab.
In the Default Account Quota section, you can view the default quotas assigned to each course, user, and group [1].

To change quotas, type a new number in the quota fields. Changing the quota will change the quotas for courses, users, and/or groups for the entire account.

Click the **Update** button [2].

**Note:** Sub-account admins cannot manage user quotas.
Find Manually Settable Quotas

In the Manually Settable Quotas section, you can search for a course or group with a specific quota. In the ID field [1], select Course ID or Group ID. In the text field [2], enter the ID of the course or group. Click the Find button [3].

**Note:** The course ID is located at the end of your course URL (i.e. canvas.instructure.com/courses/XXXXXX), and the group ID is located at the end of the URL (i.e. canvas.instructure.com/courses/XXXXXX/groups/XXXXX).

Update Quota

Canvas displays the course or group and the quota [1]. To change the quota, enter a new number in the quota field. Click the Update Quota button [2].
How do I create a global announcement in an account?

Global announcements allows you to contact all or specific users within an account or subaccount using one message. For example, if there will be a time period of updating or downtime for the account, you may want to let the users know ahead of time so they can plan accordingly.

Global announcements are shown from all accounts associated with a user and display in the user's Dashboard. If a user has an account with multiple institutions, the user can view multiple announcements. To help differentiate announcements at the account and subaccount levels, the announcement also indicates which account or subaccount sent the global announcement.

You can create five different types of announcements: warning, error, information, question, or calendar. When a new global announcement is created, information will display as the default announcement type. To learn more about the announcement types and how they appear to users, view the Global Announcement Types PDF.

Global announcements can be shown during a specific date range. Once an announcement passes its start date, the announcement is immediately visible in each user's dashboard and can be dismissed by the user.

If necessary, you can also edit the text in a global announcement, such as to fix spelling errors. The start and end dates can also be edited until the actual start or end date for the announcement.

Notes:

- Global announcements are not supported as a user notification preference and can only be viewed in the Dashboard.
- When users are not enrolled in any courses, they can view announcements from the root account. They can only view sub-account announcements once they have been added to a course within the sub-account. Courses do not have to be published for users to view sub-account announcements.
- The Theme Editor primary color is associated with information, question, and calendar notifications. However, warning and error colors cannot be changed.
- Any edits made to an existing Global Announcement after its start date will not force the message to reappear for users who have already dismissed it. Any substantial changes to the global announcement should be created as a new Global Announcement so that it reappears for all users.
- Global announcements are not displayed to users with manually concluded and inactive enrollments.
Open Account

Click the Admin link [1], then click the name of the account [2].
Open Settings

In Account Settings, click the Settings link.

**Note:** To make an announcement in a sub-account, click the Sub-Accounts link, select a sub-account, then click the sub-account's Settings link.

Open Announcements Tab

Click the Announcements tab.

Add a New Announcement

Click the Add New Announcement button.
Add Announcement Details

1. In the **Title** field [1], type the title of the announcement.
2. In the **Announcement type** field [2], set the Announcement type (warning, error, information, question, or calendar).
3. In the **Message** field [3], create the announcement using the Rich Content Editor. The Rich Content Editor includes a word count display below the bottom right corner of the text box.

If your institution is associated with a trust account, you can choose to only show the announcement to users within the current domain [4].

4. In the **Send to** section [5], select the roles of users who should see the announcement. You can select both course and account roles. If no roles are selected, the announcement will display for everyone with a course in the originating account or sub-account.

In the **Title** field [1], type the title of the announcement.

In the **Announcement type** field [2], set the Announcement type (warning, error, information, question, or calendar).

In the **Message** field [3], create the announcement using the Rich Content Editor. The Rich Content Editor includes a word count display below the bottom right corner of the text box.

If your institution is associated with a trust account, you can choose to only show the announcement to users within the current domain [4].

In the **Send to** section [5], select the roles of users who should see the announcement. You can select both course and account roles. If no roles are selected, the announcement will display for everyone with a course in the originating account or sub-account.
Choose Start and End Dates

Choose the start and end dates for the announcement by typing in the fields or selecting the Calendar icons (required).

Publish Announcement

Click the Publish Announcement button.

View Global Announcement

View the global announcement. The announcement includes the name of your account or sub-account.
Manage Announcement

Book Fair

Remember the Book Fair this week!

This is a message for Documentation Canvas

To edit your global announcement, click the Edit icon [1]. To delete your global announcement, click the Delete icon [2].
What user enrollment and registration options are available in Canvas?

As an account admin, you can set different enrollment and registration options for your account. Available options include self enrollment, self registration, and open registration.

Self Enrollment

Self-enrollment is an open enrollment method that allows students to use a secret URL or code to join a course. This option requires students to have an existing Canvas account—most institutions automatically create Canvas accounts for each student through SIS import.

If you enable self enrollment for an account, instructors can allow self-enrollment for their course in Course Settings to generate the secret URL or code to send to students.

Instructors can also add a link to the course home page for students to join the course at any time. This option also works well for courses added to the Public Course Index.
Self Registration

Current Provider

Canvas

You can log in directly with this provider by going to /login/canvas

[Self Registration]
- Disabled
- All Account Types
- Observer Accounts Only

Delete Save

Self registration is an authentication method through Canvas that allows users without an account to create an account for themselves.

If you enable self registration but students do not have a Canvas account, self registration allows them to create their own account to log in to Canvas and join the course.
### Open Registration

<table>
<thead>
<tr>
<th>Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Open Registration</td>
</tr>
<tr>
<td>✔ Users can edit their name</td>
</tr>
<tr>
<td>✔ Users can delete their institution-assigned email address</td>
</tr>
<tr>
<td>✔ Show the email address of sender for user interaction Notifications</td>
</tr>
<tr>
<td>☐ Equella</td>
</tr>
<tr>
<td>✔ Analytics</td>
</tr>
<tr>
<td>✔ User Avatars</td>
</tr>
</tbody>
</table>

Open registration allows students to be added to a course, even if the students don't have a Canvas account in your institution. Students will create their account during the course enrollment process.

You can [enable open registration](#) in your account settings.
How do I enable open registration in an account and allow instructors to add users to a course without Canvas accounts?

As an admin, you can enable Open Registration for your entire account. Open registration allows instructors with the appropriate permissions to add users to a course, even if the users don't already have Canvas accounts. When an instructor adds a user to a course, the user is sent a course invitation. To join the course, the user must first register with Canvas and create a password. The user's account will then display in the account Users list.

Even if Open Registration is disabled, admin roles with permission to add or remove users can always add users to courses without Canvas accounts.

Once this feature is enabled, instructors can add users in the course People page.

Open Account

Click the Admin link [1], then click the name of the account [2].
Open Settings

In Account Navigation, click the Settings link.

Change Open Registration

In the Settings tab under the Features heading, click the Open Registration checkbox.

Note: By default, this option is turned off.
Update Settings

Click the Update Settings button.
How do I enable self-enrollment in an account and allow students to self-enroll in a course?

Self-enrollment can be enabled in account settings. Enabling self-enrollment give instructors the ability to allow students to use a join code or click a button to enroll themselves in a course. By default, self-enrollment is disabled for the account. Once this feature is enabled, instructors can enable self-enrollment in Course Settings.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Settings

In Account Settings, click the Settings link.

Allow Self-Enrollment

In the Settings tab, locate the Allow Self-Enrollment drop-down menu.

Set Self-Enrollment
Select the type of self-enrollment permission you want to enable.

To enable courses that aren’t linked to any SIS data or affected by SIS imports, click the **For Manually-Created Courses** option [1].

To enable any type of course, whether manually-created or created using the SIS Import tool, click the **For Any Courses** option [2].

**Update Settings**

Click the **Update Settings** button.
How do I change the sender name in account email notifications?

Canvas gives administrators the option to set up a custom sender name for Canvas notifications. This custom text can be your institution name or whatever sender information you would like to use. Using the custom text field helps students identify account notification emails more easily and improves the quality of student-instructor interaction.

Setting a custom sender name does not affect course notifications, which are always sent as the name of the course. However, daily and weekly course summaries (which can mention multiple courses) are sent as an account notification. If no custom name is set, Canvas uses the account default.

Note: Sub-account admins cannot change the sender name in account email notifications.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Settings

- SIS Import
- Themes
- Developer Keys
- Canvas Data Portal
- Canvas Parent Tools
- Admin Tools

In Account Navigation, click the Settings link.

Open Notifications

Click the Notifications tab.
Select Custom "From" Name

E-mail Notification "From" Settings
This setting allows the Admin to brand or label the 'From' text on all notifications sent from Canvas for this Account.

☐ Default Canvas Setting

Example:

<table>
<thead>
<tr>
<th>From</th>
<th>Instructure Canvas <a href="mailto:notifications@instructure.com">notifications@instructure.com</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Recent Canvas Notifications</td>
</tr>
<tr>
<td>Date</td>
<td>Sep 15 at 3:07pm</td>
</tr>
<tr>
<td>To</td>
<td><a href="mailto:recipient@instructure.com">recipient@instructure.com</a></td>
</tr>
<tr>
<td>Reply-To</td>
<td><a href="mailto:notifications+e79df3ijk09s2jkk099sljkljklj21-101916333@instructure.com">notifications+e79df3ijk09s2jkk099sljkljklj21-101916333@instructure.com</a></td>
</tr>
</tbody>
</table>

☐ Custom "From" Name

If selected, this will replace all other branding sent in Canvas notifications.

Example:

<table>
<thead>
<tr>
<th>From</th>
<th>[Custom Text] <a href="mailto:notifications@instructure.com">notifications@instructure.com</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Recent Canvas Notifications</td>
</tr>
<tr>
<td>Date</td>
<td>Sep 15 at 3:07pm</td>
</tr>
<tr>
<td>To</td>
<td><a href="mailto:recipient@instructure.com">recipient@instructure.com</a></td>
</tr>
<tr>
<td>Reply-To</td>
<td><a href="mailto:notifications+e79df3ijk09s2jkk099sljkljklj21-101916333@instructure.com">notifications+e79df3ijk09s2jkk099sljkljklj21-101916333@instructure.com</a></td>
</tr>
</tbody>
</table>

Select the Custom "From" Name button.
Change Custom "From" Name

If selected, this will replace all other branding sent in Canvas notifications.

Example:

From Documentation <notifications@instructure.com>
Subject Recent Canvas Notifications
Date Sep 15 at 3:07pm
To recipient@instructure.com
Reply-To notifications+e79df3ljkJ09sljkJ3lkj2l-10191633@instructure.com

Type your preferred name into the Custom "From" Name field [1]. Verify the example of the name as it will display in the "from" field of the email notification [2].
Select Default Canvas Setting

E-mail Notification "From" Settings

This setting allows the Admin to brand or label the 'From' text on all notifications sent from Canvas for this Account.

- **Default Canvas Setting**
  
  **Example:**
  
  From: Instructure Canvas <notifications@instructure.com>
  Subject: Recent Canvas Notifications
  Date: Sep 15 at 3:02pm
  To: recipient@instructure.com
  Reply-To: notifications+e79df3ljk09c3jk09usjk3lj2i-10191633@instructure.com

- **Custom "From" Name**
  
  If selected, this will replace all other branding sent in Canvas notifications.
  
  **Example:**
  
  From: [Custom Text] <notifications@instructure.com>
  Subject: Recent Canvas Notifications
  Date: Sep 15 at 3:02pm
  To: recipient@instructure.com
  Reply-To: notifications+e79df3ljk09c3jk09usjk3lj2i-10191633@instructure.com

If you do not want to have a Custom "From" Name, select the Default Canvas Setting option [1]. The "From" name will display as Instructure Canvas [2].

Update Settings

Click the **Update Settings** button.
How do I enable student information system (SIS) submissions for an account?

When you integrate a student information system (SIS) in Canvas, in courses, only assignments are automatically configured to send grades to the SIS; graded discussions and quizzes have to be configured on a case-by-case basis. However, at the account level, you can configure all assignment types to be sent to your SIS automatically.

Even after setting all assignments to be sent to the SIS, instructors can still manage assignments in their courses and manually remove individual assignments, graded discussions, or quizzes that they do not want to send to your SIS. Assignments can be managed from the Assignments page and Quizzes page, or they can be managed when creating an SIS assignment, SIS graded discussion, or SIS quiz.

Notes:

- Student information systems must be configured by your Customer Success Manager. You cannot configure your SIS submissions unless a specific feature option is enabled for your account.
- This feature is only available if the Allow Bulk Grade Export to SIS feature option has been enabled for your account. If the New SIS Integration Settings feature option has also been enabled, you must enable SIS submissions through SIS Integration Settings.
- Learn more about feature options in the account features lesson.
Open Account

Click the Admin link [1], then click the name of the account [2].
Open Settings

In Account Navigation, click the Settings link.

Configure SIS Grade Export Settings

In the Account Settings tab, locate the SIS Grade Export Settings section.

If you want to enable all course assignments, graded discussions, and quizzes to be sent to your SIS, click the Post Grades to SIS... checkbox [1]. You can also apply the setting to sub-accounts by clicking the Lock this setting for sub-accounts checkbox [2].

Note: If your account uses the Post Grades to SIS feature option, SIS Grade Export Settings will not be available unless the Post Grades to SIS feature option is set to On.
Update Settings

Click the **Update Settings** button.
How do I manage student information system (SIS) integration settings for an account?

When you integrate a student information system (SIS) in Canvas, you can manage SIS validations and assignment sync settings for all subaccounts and courses.

Even after setting all assignments to be sent to the SIS, instructors can still manage assignments in their courses and manually remove individual assignments, graded discussions, or quizzes that they do not want to send to your SIS. Assignments can be managed from the Assignments page and Quizzes page, or they can be managed when creating an SIS assignment, SIS graded discussion, or SIS quiz. However, if any sync validations have been set, instructors must adapt their assignments to the validation settings.

Notes:

- Student information systems must be configured by your Customer Success Manager. You cannot configure your SIS submissions unless a specific feature option is enabled for your account.
- This feature is only available if the New SIS Integration Settings feature option has been enabled for your account. Please note that the settings will not display unless the feature option has been set to On (not Allow). If the SIS Integration Settings feature option has not been enabled, you may still be able to enable SIS submissions in Account Settings.
- Learn more about feature options in the account features lesson.
Click the **Admin** link [1], then click the name of the account [2].
Open Settings

In Account Navigation, click the Settings link.

View SIS Integration Settings

If you wish, you can rename "SIS" to something more familiar to your staff

- SIS friendly name
- SIS imports
- SIS syncing

In the Account Settings tab, locate the SIS Integration Settings section.
Set SIS Friendly Name

If you want to show the name of your SIS provider in Canvas courses, enter the name in the SIS friendly name field. The name displays in the SIS checkbox in Canvas assignments, graded discussions, and quizzes. This option is helpful for instructors who may not know what an SIS is, but who may be familiar with a setting identified with the SIS name (e.g., PowerSchool).

Enable SIS Imports

If you want to allow users with SIS permissions to import CSV files from your student information system, click the SIS Imports checkbox.

Enable SIS Syncing

If you want to enable SIS syncing, click the SIS Syncing checkbox. This setting manages all workflows associated with sending SIS data back to your SIS provider.
View SIS Syncing Settings

You can enable four workflow settings with SIS Syncing. These settings set defaults for all assignments throughout all courses; however, course instructors ultimately manage which assignments are synced by selecting the Sync to SIS option in a graded assignment or the Sync to SIS toggle option in the Assignment Index Page.

**Note**: Currently this setting does not support syncing a final or midterm grade, which will be added in a future release.

- [ ] SIS imports
- [x] SIS syncing
- [ ] Lock this setting for sub-accounts
- [x] Default SIS Sync for assignments, quizzes, grade discussion
- [ ] Require assignment due date
- [x] Limit assignment names lengths (max 255)

**Lock this Setting for Subaccounts** [1]. This setting locks all selected SIS Sync settings for subaccounts. Subaccount admins cannot change any SIS settings.

**Default SIS Sync for Assignments, Quizzes, Graded Discussion** [2]. This setting displays the SIS Friendly Name in the Post to [SIS] checkbox in Canvas assignments, graded discussions, and quizzes. All graded assignments, graded discussions, and graded quizzes will be enabled to be passed back to the SIS by default. (In quizzes, this setting does not apply to practice quizzes and surveys.) The name of the SIS also displays in the checkbox when creating an assignment shell in the Assignments page.

**Require Assignment Due Date** [3]. *This checkbox is only visible with the Default SIS Sync for Assignments, Quizzes, Graded Discussion setting.* This setting requires all assignments, graded discussions, and quizzes to include a due date. In a course, if a due date is not included in a graded assignment, Canvas will ask the user to add a due date. The assignment cannot be saved until the due date error is resolved or the Sync to SIS option is disabled for the assignment.

Due date validation is based on the assignment setup:

- If the assignment is assigned to Everyone, the due date is validated against the course date. If the course does not include a course override date, the assignment is validated against the term date.
- If the assignment is assigned to one or more sections, the due date is validated against the section date. If the section does not include a section override date, the assignment is validated against the course or term date.
• If the assignment is assigned to one or more students, the assignment is currently not validated.
• If the assignment is assigned to one or more students using MasteryPaths, the assignment is currently not validated.

Limit Assignment Names Lengths [4]. This setting limits the assignment name to a specific number of characters, which should be based on the SIS provider’s length limit, if any. In the Characters field, enter the maximum number of allowed characters. In a course, if an assignment name exceeds the number of set characters, Canvas will notify the user that the assignment name is too long. The assignment cannot be saved until the name length error is resolved or the Sync to SIS option is disabled for the assignment.

Note: If no number limit is entered, Canvas defaults to the maximum of 255 characters, regardless of whether the checkbox is selected.

Update Settings

Click the Update Settings button.
How do I warn users in an account about using non-institutional email addresses for confidential information?

Administrators can enable a warning reminding all users about preferred email addresses for notifications. When enabled, the next time users at that institution visit the Notification Preferences page, they will see a popup alerting them that adding a non-institution based email address may result in the exposure of sensitive content.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Account Settings

In Account Navigation, click the Settings link.

Open Notifications

Click the Notifications tab.
Select Display Warning

Notifications Sent to External Services

☐ Display one time pop-up warning on Notification Preferences page.

Pop-up Message Content:
Notice: Some notifications may contain confidential information. Selecting to receive notifications at an email other than your institution provided address may result in sending sensitive Canvas course and group information outside of the institutional system.

Select the Display one time pop-up warning on Notification Preferences page checkbox.

Update Settings

Click the Update Settings button.
How do I restrict student access before or after a course date at the account level?

As an admin, you can choose to set default restrictions for student access in your institution. These restrictions include student access to courses before or after the start and end date. These restriction settings can be used independently or in conjunction with override course start and end dates for the course. If no override dates are specified for the course, the start and end dates apply to the term dates. However, instructors can add override course and end dates.

To manage student access, you can set the default value but allow instructors and sub-account admins to edit access for the course and sub-account levels as necessary, or you can set and lock the student access setting for the entire institution. The checkbox settings at the account level are passed to the sub-account and course levels as default values.

**Restrict students from viewing course before start date:** When a student enrolls in a future course, the course displays in the Future Enrollments section in the student Courses list. Once a course is published, the course displays an invitation to join the course, where the students can view course content at any time before the course begins. However, when the student restriction for the course start date is enabled, students cannot view a link to the course until the start date, even if the course is published.

**Restrict students from viewing future courses in enrollments list:** When a student enrolls in a future course, the course displays in the Future Enrollments section in the student Courses list. However, when the view courses before the start date restriction is enabled, a second option is displayed to completely remove the future enrollment from the Courses list. This setting can also be enabled to keep students from knowing they are enrolled in a course with a future start date.

**Restrict students from viewing course after end date:** Once a course has concluded, students can still view the course but all content is displayed in a read-only state. However, when the student restriction for the course end date is enabled, students can no longer view the course in the Courses list after the course has concluded. This setting can be used if your institution uses the course across multiple terms and want to restrict students from accessing prior content for future students, or if students have to re-enroll in the course.

**Note:** Although any changed section dates override course dates, student access restrictions cannot be set at the section level, and restriction options apply to all sections within the course.
Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Account Settings

In Account Navigation, click the Settings link.

View Restriction Options

- Restrict students from accessing courses before start date
- Lock this setting for sub-accounts and courses
- Restrict students from accessing courses after end date
- Lock this setting for sub-accounts and courses

In the Account Settings tab, locate the course restriction options.

By default, student access checkboxes are not selected, meaning students can view a link to any enrolled future course (after they accept their course invitation) or a concluded course.

To retain this default for the entire institution, do not select any checkboxes.

Notes:
The student restriction checkboxes set a preset for all new courses created in the account, as well as section override dates. The lock settings apply immediately to all existing courses and section override dates in the account.

**Restrict Students Before Start Date**

1. Restrict students from accessing courses before start date
2. Lock this setting for sub-accounts and courses

To set a default for the entire account so that students cannot view a link to the course before the start date, click the **Restrict students from accessing courses before start date** checkbox [1]. When selected, the course is inaccessible before the course start date. If the course dates are blank, the start date applies to the term start date.

If you want to lock the default setting for sub-accounts and courses and apply the change immediately, click the **Lock this setting for sub-accounts and courses** checkbox [2].

**Restrict Course in Enrollments List**

1. Restrict students from viewing future courses in enrollments list
2. Lock this setting for sub-accounts

When you restrict students from accessing courses before the start date, you can also restrict students from viewing future courses in the Enrollments list.

If you don't want students to see they have been enrolled in a future course, select the **Restrict students from viewing future courses in enrollments list** checkbox [1].

If you want to lock the default setting for sub-accounts and apply the change immediately, click the **Lock this setting for sub-accounts** checkbox [2].
Restrict Students After End Date

To set a default for the entire account so that students cannot access the course after the course end date, Restrict students from viewing courses after end date checkbox [1]. When selected, the course is inaccessible after the course end date. If the course dates are blank, the end date applies to the term end date.

If you want to lock the default setting for sub-accounts and courses and apply the change immediately, click the Lock this setting for sub-accounts and courses checkbox [2].

Update Settings

Click the Update Settings button.
How do I change the language preference in an account?

You can change the default language for your entire account. Canvas supports a variety of languages. This change will override any browser/OS language settings.

Note: Users can select a preferred language in their user settings, which will override the account default.

Open Settings

In Account Navigation, click the Settings link.

Select Language

In the Settings tab, click the Default Language drop-down menu. Select the new default language.
Update Settings

Click the **Update Settings** button.

View in Default Language

View Canvas in the new default language for your account.
How do I disable announcement replies for all courses in an account?

As an admin, you can choose to disable replies to announcements for all courses in an account.

To manage comments, you can set the default value but allow instructors and sub-account admins to enable comments as necessary, or you can set and lock the setting for all courses and sub-accounts. The checkbox settings at the account level are passed to the sub-account and course levels as default values.

Note: Courses created before the option is applied will retain their settings until it is changed at the course level. Courses created after the option is applied will inherit the account level setting, which will persist until it is changed at the course level.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Account Settings

In Account Navigation, click the Settings link.

Disable Comments on Announcements

In the Account Settings tab, locate the announcements options.

To set a default for the entire account so that comments are automatically disabled for announcement comments in each course, click the Disable comments on announcements checkbox [1]. This option applies immediately to new courses. When enabled, all announcements show as closed for comments, but instructors can open individual announcements as necessary. Instructors can open Course Settings and remove the option completely for all new announcements.

If you want to lock the default setting for sub-accounts and courses, click the Lock this setting for sub-accounts and courses checkbox [2]. This option does not allow instructors to open any individual announcements or remove the limitation in Course Settings.
Update Settings

Click the Update Settings button.
How do I customize the Canvas Help Menu for an account?

The Help Menu assists users in your institution by displaying a list of resources about Canvas. Depending on a user’s role, users can view up to five default help options. As an admin, you can reorder or hide default links in the Help Menu. You can also add custom help links for your institution and choose if they should be available to all users or specific user roles.

You can also change the Help icon and text that displays throughout Canvas.

This lesson shows how to access the Help Menu Options directly from the Global Navigation Menu. However, you can also access the Help Menu options in Account Settings.

Notes:

- Custom help links can only be viewed in Canvas web browsers. In mobile devices, the Canvas Teacher and Canvas Student apps do not display custom help links.
- Canvas Help Menu customizations are only available at the account level and automatically apply to all subaccounts. When opening the Help Menu, only admins can view the customization link.
- Help Menu customizations are not available in Free-for-Teacher accounts.
- The Help Menu links also display when a user accesses the Help link in the Login page. However, the Ask Your Instructor a Question and Ask the Community links are never part of the Help Menu in the Login page since the Login page does not associate a user by role.
Customize Help Menu

In Global Navigation, click the Help Menu link [1], then click the Customize this menu link [2].
View Help Menu Options

In the Settings tab, locate the Help Menu options section.

Customize Name

By default, the Canvas Help Menu text displays as Help. To change the text, enter the new name in the text field.

The name of the Help Menu displays in the Global Navigation Menu, the footer of the login page, and the top menu bar in SpeedGrader. The name should be no more than 30 characters.
Customize Icon

By default, the Help navigation icon displays as a question mark. To change the navigation icon, select another icon from the included icon set. The selected icon displays a square border.

The navigation icon currently only displays in the Global Navigation Menu. To best assist your account users, the navigation icon should compliment the name of the Help Menu.

Customize Help Menu Links

You can allow your users to view up to five default Help Menu links according to their role:

- **Ask your Instructor a Question (Students Only) [1]**: Students can quickly send their instructor(s) questions about their courses; messages are copied to the Conversations Sent folder and moved to the Inbox when a reply is received.
- **Search the Canvas Guides [2]**: Users can search the Canvas Guides for information about features inside of Canvas.
- **Report a Problem [3]**: Users can submit problems with Canvas; tickets are either sent to Canvas or your own support team, depending on your institution’s preference to manage support tickets.
- **Ask the Community (Non-Students Only) [4]**: Users can exchange ideas and solutions regarding Canvas functionality with Canvas experts and their Canvas peers.
- **Submit a Feature Idea [5]**: Users can submit ideas about how to make Canvas better.
Manage Default Links

To move a default link up or down in the menu, click the up or down arrow [1]. To delete a default link, click the Delete icon [2]. To edit a default link, click the Edit icon [3].

Note: The Help Menu links also display when a user accesses the Help Menu from the Login page. However, even when enabled, Ask Your Instructor a Question and Ask the Community links are never part of the Help Menu in the Login page since the Login page does not associate a user by role.
Edit Default Links

To edit the name of a default link, use the **Link name** field [1]. To edit the description of a default link, use the **Link description** field [2]. To select which users can view a default link, use the **Available to** checkboxes [3]. Options include Everyone, Students, Teachers, Admins, Observers, and Unenrolled. Unless otherwise changed, custom links select checkboxes for all roles.

**Note:** The Link URL cannot be changed for default links.
Restore Default Links

If you want to restore a default link in the Help Menu, click the Add Link button [1] and select the name of the link [2]. Faded links cannot be added as they are already in the Help Menu [3].
Add Custom Link

If you’d like to add a custom link to the Help Menu, click the Add Link button [1], then click the Add Custom Link option [2].

**Note:** Custom help links can only be viewed in Canvas web browsers. In mobile devices, the Canvas Teacher and Canvas Student apps do not display custom help links.
Add Link

In the **Link name** field [1], enter the link name.

In the **Link description** field [2], enter a description for the link.

In the **Link URL** field [3], enter the URL for the link. This field is required.

The link URL field also supports the telephone URL and mailto schemes.

- To create a click-to-call link in the Help Menu, enter tel:+ followed by the internal format of the phone number (country code, area code, and number) in this field. Additionally, users can use the telephone link to call the number through their computers. When a user clicks the link, the user receives a confirmation alert before the call is placed. (Users may be able to access telephone links when viewing Canvas in a mobile browser, although mobile browsers are not officially supported by Canvas.)

- To create a mailto scheme in the Help Menu, enter mailto: followed by the email address. When a user clicks the link, the user's browser opens the email service configured in the user's browser and creates an email to the designated email address. If no browser configuration is set, the browser will try to pass the email link to a desktop email program.

For the **Available to** checkboxes [4], select the user(s) who can view the link. Options include Everyone, Students, Teachers, Admins, Observers, and Unenrolled. Unless otherwise changed, custom links select checkboxes for all roles.
Click the Add Link button [5].

Manage Custom Links

To move a custom link up or down in the menu, click the up or down arrow [1]. To edit a custom link, click the Edit icon [2]. To delete a custom link, click the Delete icon [3].

To add another custom link, click the Add Link button [4].

Update Settings

Click the Update Settings button.
How do I view reports for an account?

Account-level admins have access to Canvas reports that can be used to review account data. Canvas includes a set of default reports, though other customized reports may be included for your institution. Learn about report configurations in the Canvas Default Account Reports PDF.

Open Account

In Global Navigation, click the Admin link [1], then click the name of the account [2].
Open Settings

In Account Navigation, click the Settings link.

Open Reports

Click the Reports tab.
## View Reports

The reports page shows all available reports. Each report includes the name [1] and a help icon [2] that explains more about the report. You can also view the last time the report was run, if any [3].

## Configure Reports

Most reports must be configured before they can be run. To configure a report, click the **Configure** button.

Depending on the report, report configurations may include one or several options.
Select Terms

All reports except the LTI Report, Outcome Export, and User Access Tokens reports require you to select a term. In the Terms drop-down menu [1], you can choose from the Default Term, or any active, future, or past terms. Courses with muted assignments may not accurately reflect scores in this report.

The Grade Export, Last User Access, Student Competency, LTI Report, and User Access Tokens reports include the option to include deleted objects. Deleted objects may include deleted courses, users, or enrollments. To include deleted objects, click the Include Deleted Objects checkbox [2].
Select Report Order

The Outcome Results report allows you to choose how to order the report. Ordering options are by Users, Courses, or Outcomes. By default, the report orders by Users. Select the radio button for your preferred report order.
Select CSV Files

The Provisioning and SIS Export reports ask you to select the CSV files you want to generate for a selected term [1]. Select the checkboxes next to the files you want to generate. Files can be generated for Users, Accounts, Terms, Courses, Sections, Enrollments, Groups, Group memberships, Group categories, Cross-listing (X list), User Observers, and Admins. You can also choose to include deleted objects, which may include deleted courses, users, or enrollments.

Viewing SIS data is optional in these reports. If you want to include data created by your SIS, select the Created by SIS checkbox [2]. Otherwise, the CSV files only display data created through the Canvas interface.

**Note:** The selected term only impacts Courses, Sections, Enrollments, and Cross-listing CSV files.
Select Dates and Enrollment State

The Students with no Submissions report asks you to select a start date [1] and end date [2] for the report. You can either select a date by clicking each respective date's calendar icon, or you can enter the date directly in the date field.

You may also choose to include the enrollment state in the report by clicking the Include Enrollment State checkbox [3]. In the Enrollment State drop-down menu [4], select all enrollments or only active enrollments.

The Students with no Submissions report asks you to select a start date [1] and end date [2] for the report. You can either select a date by clicking each respective date's calendar icon, or you can enter the date directly in the date field.

You may also choose to include the enrollment state in the report by clicking the Include Enrollment State checkbox [3]. In the Enrollment State drop-down menu [4], select all enrollments or only active enrollments.
Select Start Date

The Zero Activity report asks you to select a start date for the report. You can either select a date by clicking the calendar icon, or you can enter the date directly in the date field.

Run Report

When you have finished configuring a report, click the Run Report button.
Download Report

<table>
<thead>
<tr>
<th>Name</th>
<th>Last Run</th>
<th>Configure...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Storage</td>
<td>Jun 11 at 5:33am (Term: All Terms;)</td>
<td>Configure...</td>
</tr>
<tr>
<td>Grade Export</td>
<td>Apr 26 at 9:44pm (Term: All Terms;)</td>
<td>Configure...</td>
</tr>
<tr>
<td>LTI Report</td>
<td>Mar 7, 2016 at 3:47pm</td>
<td>Configure...</td>
</tr>
</tbody>
</table>

When a report is complete and is available for download, click the Download icon. The file will download to your computer.
How do I manage new features for an account?

Canvas is continually creating new features to improve your experience. The majority of improvements will be made available as part of our regular release cycle. However, some features may change the workflow for common activities in Canvas during your current term. Because we want you to be able to learn about these features at your own pace, they’ll be placed in your Account Settings as a Feature Option. Feature Options allow you to choose when you want to enable the new feature for your institution. Most institutions will pilot the feature within their institution and then enable it for the entire institution between terms.

This lesson gives an overview of how to manage feature options for an entire account. Features may be able to be activated on account, sub-account, course, and user levels. On the course level, you can give instructors the option to implement features on a course-by-course basis. Admins and instructors have no control over user-level features.

The majority of features will be available for you to enable at any time. However, some features will only appear after they are enabled by your Customer Success Manager. To view specific feature options available in Canvas, visit the [current account features](#) lesson.

**Please note that most Feature Options will only be optional for a short period of time.** Once a Feature Option is officially released to your production environment, you’ll have a few releases (depending on the feature) before the option will be enabled for all Canvas users. Therefore we encourage you to use your [beta environment](#) to learn about new Feature Options for your institution, and when the features are released to your production environment, allow them as quickly as appropriate for your institution.

**Note:** Account-level features cannot be managed in sub-accounts and Free-for-Teacher accounts.
Open Account Settings

In Account Navigation, click the Settings link.

Open Feature Options Tab

Click the Feature Options tab.
View Feature Options

Available features will appear in the Feature Options tab. Some new features may need to be enabled by your Customer Success Manager.
View Types of Features

Once features are available, they will be listed by Account [1] or Course [2], depending on the feature's functionality level. Each feature includes a feature description. To expand the feature box and display the description, click the arrow icon [3].

View Feature Tags

Feature tags help identify the state of each feature. A feature with no label [1] means the feature is stable and ready for use in your production environment. Features may also include a beta tag [2], which means the feature is available for use in your
production environment but is still being tested for usability and accessibility behavior. Enabling a beta feature may create unintended behavior within your Canvas account.

Note: Occasionally features may include a Development tag, which means the feature is only available for testing in your beta environment; it is not available in your production environment.

View Feature Access

```
Account
- K-12 Specific Features  beta
- LOR External Tools
- Public Course Index  beta

Course
- ePub Exporting  beta
- Learning Mastery Gradebook
```

Each feature displays a feature access status that can be changed according to your preference.

View On Feature

```
- Use remote service for notifications  beta
```

If a feature is turned on, the feature will be grayed out and set to On. Your account will be required to use this feature.
View Allowed Feature

If a feature is made available in Canvas, you can choose how you want to manage the feature for your account or courses in the account, depending on the location of the feature option.

Allowed features display three options:

1. **On**: Toggle this button to turn on this feature, which will be enabled for the account and all subaccounts. Your instructors will be required to use this feature in their courses. This option is good for features that need to be implemented across the account immediately or that have been Allowed for enough time that users have adapted to them (if necessary).

2. **Allow**: Toggle this button to manage the feature for individual subaccounts or courses. This option is good for features that need to be enabled in only specific subaccounts or courses, or features that may need to be phased into the account on a course-by-course basis. *If you want a feature to apply to the main account, this option does not apply; you must use the On option instead.*

3. **Off**: Toggle this button if you do not want to enable this feature. This option is good for features that you are not yet comfortable allowing, or features that appear within a semester and you do not want to distract instructors from their courses.

At the course level, features default either to Off or Allow, depending on the type and complexity of the feature. Features with low impact may be set to Allow automatically. Hidden features requested to be enabled by a Customer Success Manager are also set to Allow.

**Note:** Depending on feature functionality, when you enable a feature to Allow or On, Canvas **may** display a warning message asking to confirm your option, as some account features cannot be turned off once they are enabled.

View Course-Level Features

Instructors can view features you've enabled in the Feature Options tab in Course Settings.
View User-Level Features

Users can enable [User-Level Feature Options](#) at the bottom of their Profile Settings.

**Note:** Admins have no control over user-level features.
What feature options are currently available for an entire Canvas account?

Canvas is continually creating new features to improve your experience. The majority of improvements will be made available as part of our regular release cycle. However, some features may change the workflow for common activities in Canvas during your current term and will be placed in your Account Settings as a Feature Option. After a specified period of time, some Feature Options may become standard features in Canvas. Learn more about Feature Options and how to enable them in the manage new features lesson.

Feature Option Availability

The Feature Options shown in this lesson are available for all institutions and noted in their respective environments (beta or production). Some feature options must be enabled by your Customer Success Manager.

Course-Level Features

Please note that course feature options can be enforced for an entire account if necessary.

Notes:

- Feature option settings are never copied from production and always retain their default settings. Feature options must be managed individually in the test and beta environments.
- Some feature options may not be available in sub-accounts and Free-for-Teacher accounts. For more information about available feature options in Free-for-Teacher accounts, please view the Canvas Account Comparisons PDF.

Enable New SIS Integration Settings

Enable new SIS integration settings must be configured with the support of your Canvas Customer Success Manager (CSM) before it can be enabled for your institution. Please contact your CSM for assistance.

Enable new SIS integration settings streamlines the SIS experience in Canvas and allows you to manage SIS validations and assignment sync settings for all sub-accounts and courses. SIS integration settings display in Account Settings.

New SIS integration settings apply to any SIS CSV provider supporting assignment-level grade passback, including PowerSchool PowerTeacher Pro and SIS providers compliant with OneRoster v.1.1. These settings could also be used in conjunction with existing Instructure Skyward and PowerSchool (old Gradebook) LTI-based integrations.
This feature option must also be used with the Allow Bulk Grade Export to SIS account feature option and Post Grades to SIS course feature option.

Details

- Released in beta April 10, 2017
- Released in production April 22, 2017

K-12 Specific Features

K-12 Specific Features must be configured with the support of your Canvas Customer Success Manager (CSM) before it can be enabled for your institution. Please contact your CSM for assistance.

K-12 Specific Features allows you to display the Global Navigation menu in K-12 specific branding. This feature can be used for customization in the Theme Editor.

Details

- Released in beta July 28, 2014
- Released in production August 16, 2014

Public Course Index

The Public Course Index allows all users within an institution to publicly view the institution's course index in a catalog format. This feature is especially helpful for institutions that want to display courses with public content. Courses can be added to the public course index on the course settings page.
When enabled, users can open the My Courses page and view a link to the Public Course Index. Users can view all courses that have been listed in the public course index in an easy-to-view catalog format and locate a course by name, or they can sort courses by status: public or open enrollment.

The Public Course Index is a separate feature from Canvas Catalog, an all-in-one learning solution that integrates with the Canvas LMS as a course registration system, payment gateway, and learning platform.

Details

- Released in beta November 17, 2014
- Released in production December 6, 2014

Allow Bulk Grade Export to SIS

Allow Bulk Grade Export to SIS must be configured with the support of your Canvas Customer Success Manager (CSM) before it can be enabled for your institution. Please contact your CSM for assistance.

Allow Bulk Grade Export to SIS allows the Canvas Gradebook to share grade information with your institution's external Student Information System (SIS). This feature can be enabled on both account and subaccount levels. Only assignments that are individually selected by the instructor will be sent back to the SIS. This feature does not apply to courses that do not specify an SIS ID in Course Settings.

This feature option affects all student information systems except Skyward (enabled by an LTI tool) and PowerSchool (enabled by the Post Grades to SIS feature option). However, if the Enable New SIS Integration Settings account feature option is enabled, Allow Bulk Grade Export to SIS is also required to be enabled regardless of your institution's SIS.

Details

- Released in beta January 9, 2016
- Released in production February 20, 2016
International SMS

International SMS must be configured with the support of your Canvas Customer Success Manager (CSM) and an Implementation Consultant before it can be enabled for your institution. Please contact your CSM for assistance.

International SMS allows users with international phone numbers to receive text messages from Canvas. Users can set their notification preferences to use their text messages to receive Canvas updates.

Details

• Released in beta December 28, 2015
• Released in production January 9, 2016

Wrap Event Titles in Calendar Month View

Wrap Event Titles in Calendar Month View allows the Calendar to support text wrapping for events and assignment titles with long names. When this feature is enabled, a calendar item name longer than the width of the date wraps the content to the next line. Some events may create additional white space between shorter events on the same week as days with longer events because the Calendar infrastructure enforces a table grid for the entire row.

This feature option affects the Calendar Month View for all users in your account.

Details

• Released in beta April 11, 2016
• Released in production April 23, 2016
Student Context Card

The Student Context Card allows instructors, TAs, and admins to click a student’s name anywhere in a course and view a sidebar-type overlay that shows quick insights and context about the student. Context cards do not apply outside a course, such as in the Conversations Inbox.

Context cards are meant to be a simplified overview of a student’s progress. This feature only applies to students; context cards are not supported for user names where the user has a non-student role.

The context is generated from grades in the Gradebook and standard page view and participation activity in course analytics. In context cards, instructors and TAs can view course activity from recent assignments, view the student’s last login to Canvas, access the user’s profile page, view participation activity compared to other students, and send a message directly to the student. Users with masquerade permissions can quickly masquerade as the user.

Details

- Released in beta January 16, 2017
- Released in production February 18, 2017

New User Tutorial

This feature removes the maximum width in Canvas, which affects Canvas courses. When enabled, the Dashboard course cards are responsive to the full width of the browser. Depending on a user's browser's resolution, the Dashboard course display more than three course cards in a single row. Additionally, Canvas in other feature areas such as Assignments and Discussions use the full width of the page and minimize white space in the sidebar.
New User Tutorial allows new instructors to view a course set-up tutorial and help them easily set up a course in Canvas. When enabled, this feature displays a tutorial in each Course Navigation index page that shows the purpose of the page and what to do next. When enabled, the tutorial applies to all courses in Canvas where a user is enrolled as an instructor.

Once this feature is enabled for an account, the Course Setup Tutorial user-level feature option displays in each instructor's User Settings page. Existing instructors can view the tutorials in new courses by enabling this user feature option at any time. User feature options cannot be managed by admins.

When this feature option is enabled, by default this tutorial is shown to new Canvas instructors in new courses. New instructors are defined as users with instructor roles created in an account after the feature option is enabled for the institution.

Details

- Released in beta April 10, 2017
- Released in production April 22, 2017

Rubric Criterion Range

Rubric Criterion Range allows rubric criterion ranges to display a point range instead of an individual point value. When enabled, each rating displays a maximum and minimum point value, and the maximum value is assigned as the point value.

Ranges are managed the same way as non-range rubrics. Ratings can be divided, edited, and removed individually, and total point value changes automatically adjust for all rating values.

Details

- Released in beta September 25, 2017
- Released in production October 7, 2017
Encrypted Sourcedids for Basic Outcomes

Encrypted Sourcedids for Basic Outcomes allows lis_result_sourcedids to be encrypted. This parameter is part of the LTI IMS specification used in grade passback integrations and historically includes a combination of known information such as course id, tool id, and assignment id.

When enabled, an opaque ID will be sent for the lis_result_sourcedid passed during assignment launches.

Details

• Released in beta December 18, 2017
• Released in production January 6, 2018

Non-Scoring Rubrics

Non-Scoring Rubrics allows rubrics to be created without point values. This feature promotes learning engagement by helping students focus on assignment feedback instead of point values. Additionally, improvements have been made to the Learning Mastery Gradebook and Student Learning Mastery Gradebook interfaces for a simplified user experience.

At the account level, the Rubrics page provides customized learning mastery ratings for an institution.

Details

• Released in beta July 2, 2018
• Released in production July 14, 2018
LTI 1.3 and LTI Advantage

LTI 1.3 and LTI Advantage allows admins to manage configuration data in the Developer Keys page for external tools using LTI 1.3 and LTI Advantage. Supported LTI can then be added to an account or course External Apps page via an associated client ID.

This feature option should only be enabled to configure tools that include LTI Advantage services. Specific questions about a provider’s integration or potential integration with the LTI 1.3 and LTI Advantage framework should be sent directly to the tool provider.

Details

• Released in beta June 1, 2019
• Released in production June 22, 2019

ePub Exporting

By default this feature is set to Off.

ePub Exporting allows all users to download a course as an ePub file. This feature allows users to view course content offline, such as files and pages. However, users cannot interact with the course in ePub material; course materials are displayed in a read-only state and any tasks such as submitting an assignment must be completed online.

By default, an ePub file is arranged by module, meaning only items that students have access to view in each module are included in the ePub file. However, instructors can choose to organize the ePub file by content type (e.g. assignment, quizzes, etc.) in Course Settings.

Note: Canvas offers an additional download option that allows users to export modules content offline as an HTML file. If this feature is enabled for an account, the offline content feature will override the ePub Exporting feature option. The offline content feature can be enabled by a Customer Success Manager.
Learning Mastery Gradebook

Details
- Released in beta November 30, 2015
- Released in production December 19, 2015

This feature will always be a feature option in Canvas. By default this feature is set to Allow.

The Learning Mastery (Outcome) Gradebook helps you and your instructors assess the outcomes that are being used in Canvas courses. Located as part of the regular Gradebook, the Learning Mastery Gradebook provides an overview of student learning based on standards rather than grades. Instructors can also use the gradebook for feedback about curriculum and teaching methods.

Students are not affected by the Learning Mastery Gradebook unless the Student Learning Mastery Gradebook option is also enabled.

Details
- Released in beta February 18, 2014
- Released in production March 1, 2014

Allow Outcome Extra Credit

By default this feature is set to Allow.

Allow Outcome Extra Credit allows instructors to award more than the maximum possible score on an outcome in a rubric. Allowing this feature allows instructors to manage the option on a per-course basis.
Note: Excess points for a rubric criterion can be awarded at any time and are not managed by this feature option.

Details
- Released in beta April 9, 2018
- Released in production April 21, 2018

### Student Learning Mastery Gradebook

This feature will always be a feature option in Canvas. By default this feature is set to Allow. This feature can only be used in conjunction with the Learning Mastery Gradebook feature option.

The Student Learning Mastery Gradebook shows students how they are being scored against outcomes being used in Canvas courses. This feature displays as a separate grades tab on the Student Grades page when enabled by an instructor.

Details
- Released in beta June 18, 2014
- Released in production July 12, 2014

### Anonymous Instructor Annotations

Anonymous Instructor Annotations allows instructors to create assignments with anonymous instructor annotations in DocViewer-supported submissions. When students view instructor comments in DocViewer, comments do not display an instructor's name.

Details:
- Released in beta September 25, 2018
- Released in production October 6, 2018
Post Grades to SIS

Post Grades to SIS must be configured with the support of your Canvas Customer Success Manager (CSM) and an Implementation Consultant before it can be enabled for your institution. Please contact your CSM for assistance.

Post Grades to SIS allows the Canvas Gradebook to share grade information with the PowerSchool Student Information System (SIS). This feature can be enabled on both account and subaccount levels and allows instructors to pass back grades from the Gradebook. Only assignments that are individually selected by the instructor will be sent back to the SIS. This feature does not apply to courses that do not specify an SIS ID in Course Settings.

This feature is a course-level feature option. If you want to enable SIS features for the entire account through the SIS Grade Export Settings option in Account Settings, this feature option must be set to On. If the feature option is set to Allow, SIS options must be set on a course-by-course basis.

If the Enable New SIS Integration Settings account feature option is enabled, Post Grades to SIS is also required to be enabled.

Details

- Released in beta December 29, 2014
- Released in production January 10, 2015

New Gradebook

By default this feature is set to Off.

New Gradebook allows instructors to view an improved version of the Gradebook. This feature makes grading more flexible and intuitive and elevates the Gradebook user experience.
Once this feature option is enabled within a course and an instructor applies New Gradebook functionality (such as Late Policies), the feature option cannot be disabled in the course. Additionally, the account-level feature option also cannot be disabled.

*When set to Allow, this feature option can be enabled at the course level by instructors. When set to On, the New Gradebook is enforced for all courses in the account.*

**Details**

- Released in beta November 6, 2017
- Released in production November 18, 2017
- View the [New Gradebook Users Group](#)

### Final Grade Override

The Final Grade Override allows instructors using the New Gradebook to manually enter a final grade for a student different from the grade automatically calculated by Canvas.

The New Gradebook feature option must be enabled to enable this feature option. Once this feature option is enabled within a course, the feature option cannot be disabled in the course. Additionally, the account-level feature option also cannot be disabled.

**Details**

- Released in beta February 4, 2019
- Released in production February 16, 2019

### Gradebook - List Students by Sortable Name
By default this feature is set to Allow.

Gradebook - List Students by Sortable Name allows instructors to view student names in the Gradebook by sortable name. Sortable name displays as last name, first name.

This feature is only applicable to the current Gradebook; listing students by sortable name is already an option in the New Gradebook.

Details

- Released in beta December 10, 2014
- Released in production December 20, 2014

Require Usage Rights for Uploaded Files

This feature will always be a feature option in Canvas. Require Usage Rights for Uploaded Files must be configured with the support of your Canvas Customer Success Manager (CSM) before it can be enabled for your institution. Please contact your CSM for assistance.

Require Usage Rights for Uploaded Files requires users to indicate usage rights for all course files before publishing the file to a course.

Details

- Released in beta February 9, 2015
- Released in production February 21, 2015

Enable Dashboard Images for Courses

By default this feature is set to Allow.
Enable Dashboard Images for Courses allows an instructor to include an image in the course card in the Dashboard. Images are uploaded through the Course Details tab in Course Settings.

Details

- Released in beta August 15, 2016
- Released in production August 27, 2016

Anonymous Grading

By default this feature is set to Allow.

Anonymous Grading requires all course assignments to be graded anonymously in SpeedGrader. Students can view whether or not an assignment was graded anonymously in both the student Grades page and the sidebar of the assignment submission page.

If this feature option is off, instructors can still set anonymous grading for individual assignments in the SpeedGrader Settings menu.

Details

- Released in beta November 30, 2015
- Released in production December 19, 2015

Moderated Grading

By default this feature is set to Allow.
Moderated Grading allows anyone with assignment creation permissions to specify an assignment submission to be reviewed by one or multiple graders, review the assignment grades, and select which grade should be set as the final grade for each student.

For each moderated submission, the moderator does not have to personally grade the assignment, but only they can specify the final grade for each assignment. Once the assignment is created, only the moderator and admins will be able to change the assigned final grader.

Anonymous Moderated Grading

When the Anonymous Grading and Moderated Grading feature options are both enabled, content creators can create assignments that hide student names from graders and set moderating options. All options for both anonymous grading and moderated grading are displayed for the assignment on the assignment details page.

Details

- Released in beta July 2, 2018
- Released in production July 14, 2018

MasteryPaths

By default this feature is set to Allow.

MasteryPaths allows instructors and designers to customize learning experiences to students based on student performance. Instructors and course designers can identify activities for each student’s learning path and differentiate assignments for required learning, optional learning, or choosing their own content and assignments within a specific path.

Details

- Released in beta (US environments only) November 7, 2016
- Released in production (US environments only) November 19, 2016
External Collaborations Tool

By default this feature is set to Allow.

External Collaborations Tool allows users to view an updated interface for Collaborations. This feature option only applies when the Microsoft Office 365 LTI and Google Apps LTI are enabled as external apps. This feature option must be enabled in the same location as the external apps (set to allow for course level and on for account/sub-account level).

Enabling the External Collaborations Tool removes the links to all existing collaborations and no longer allows users to create collaborations with the existing Canvas Google Drive option. To implement this feature, consider setting the feature option to allow so instructors can manage any existing collaborations. Instructors who want to retain existing collaborations should not enable the External Collaborations Tool feature option at the course level.

Details

- Released in private beta August 1, 2016
- Released in production December 10, 2016

Quizzes.Next

By default this feature is set to Off.

Quizzes.Next allows instructors to use Quizzes.Next in their courses and migrate Canvas Quizzes for use in Quizzes.Next. Quizzes.Next is an assessment engine that integrates with Canvas as an LTI tool.

If the Quizzes.Next feature option does not display in your Account Settings, it needs to be provisioned for your account. For assistance with provisioning, contact your Customer Success Manager.

Details

- Released in production July 1, 2018
Quiz Log Auditing

By default this feature is set to Allow.

Quiz Log Auditing allows instructors to investigate problems that a student may have when taking a quiz. Quizzes will automatically create data for any quiz taken in the course, but Quiz Log Auditing allows the logs to be viewed as part of a student’s quiz results.

Details

- Released in beta December 29, 2014
- Released in production January 31, 2015
How do I manage the Content Security Policy for an account?

You can enable and manage the Content Security Policy from the Security tab in your Account Settings. The Content Security Policy allows you to restrict custom JavaScript that runs in your instance of Canvas. You can manually add up to 50 domains to your whitelist. Using wild cards is recommended (e.g. *.instructure.com). Canvas and Instructure domains are included in the whitelist automatically and do not count against your 50 domain limit. Additionally, any LTI tools added in your account are automatically added to the whitelist and do not count against your 50 domain limit.

When enabled in an account or sub-account, the Content Security Policy is automatically enabled for all courses within the account or sub-account. Administrators can manually disable the policy for individual courses.

Sub-accounts have three options for managing the Content Security Policy. Sub-accounts can choose to disable the Content Security Policy, which disables the policy for the sub-account, enable the Content Security Policy at the sub-account level, which only includes domains which have been whitelisted for the sub-account, or inherit the Content Security Policy from the parent account level. Inheriting the policy will inherit any whitelisted domains from the parent account level. Sub-accounts are set to inherit by default.

Open Account Settings

- Themes
- Developer Keys
- Canvas Data Portal
- Canvas Parent Tools
- Admin Tools
- Settings

In Account Navigation, click the Settings link.
Open Security Tab

Click the Security tab.

Enable Content Security Policy

Canvas Content Security Policy

The Content Security Policy allows you to restrict custom JavaScript that runs in your instance of Canvas. You can manually add up to 50 domains to your whitelist. Wild cards are recommended (e.g. *.instructure.com). Canvas and Instructure domains are included automatically and do not count against your 50 domain limit.

Enable Content Security Policy

To enable the Content Security Policy for an account, click the Enable Content Security Policy toggle.
Add Domain to Whitelist

To add a domain to your whitelist, type the domain name in the Domain Name field [1].

Click the Add Domain button [2].

Note: Wild card domains (e.g., *.instructure.com) are recommended. Wild cards include all subdomains tied to the domain name (e.g., example.instructure.com).
View Whitelist

You can view all whitelisted domains in the whitelist [1] as well as the number of domains added to the whitelist [2].

Remove Whitelisted Domain

To remove a domain from the whitelist, click the Delete icon.
View Whitelisted Tool Domains

**Whitelisted Tool Domains**

The following domains have automatically been added to your whitelist from tools already existing in your account. To remove these domains, remove the associated tools.

**NOTE:** Associated tools are only listed once, even if they have been installed in multiple subaccounts.

<table>
<thead>
<tr>
<th>Domain Name</th>
<th>Associated Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>scon-test.instructure.com</td>
<td>SCORM</td>
</tr>
<tr>
<td><a href="http://www.canvabadges.org">www.canvabadges.org</a></td>
<td>Canvabadges</td>
</tr>
<tr>
<td>chat.instructure.com</td>
<td>chat</td>
</tr>
<tr>
<td>portal.inhosteddata.com</td>
<td>Canvas Data Portal</td>
</tr>
<tr>
<td>turnitin.com</td>
<td>Turnitin LTI</td>
</tr>
<tr>
<td>edu-apps.org</td>
<td>Quizlet</td>
</tr>
</tbody>
</table>

You can view domain names that have automatically been added to your whitelist in the Whitelisted Tool Domains list.

All Canvas and Instructure domain names are automatically added to the whitelist and do not count against the 50 domain limit. Additionally, LTI tools in your account are also automatically added to the whitelist and do not count against the 50 domain limit.

**Notes:**

- To remove a domain for an LTI tool, the [LTI tool must be removed from the account or sub-account](#).
- Associated tools are only listed once in the list of whitelisted tool domains, even if they have been installed in multiple subaccounts.
Manage Sub-Account Content Security Policy

Canvas Content Security Policy

The Content Security Policy allows you to restrict custom JavaScript that runs in your instance of Canvas. You can manually add up to 50 domains to your whitelist. Wild cards are recommended (e.g. *.instructure.com). Canvas and Instructure domains are included automatically and do not count against your 50 domain limit.

Inherit Content Security Policy

Enable Content Security Policy

Whitelist

- Whitelist editing is disabled when security settings are inherited from a parent account.

Sub-accounts can manage their own Content Security Policy or choose to inherit the policy from a parent account.

By default, sub-accounts are set to inherit the Content Security Policy from the parent account.

Note: When policy settings are inherited from a parent account, whitelist editing is disabled at the sub-account level.

Enable Content Security Policy

Canvas Content Security Policy

The Content Security Policy allows you to restrict custom JavaScript that runs in your instance of Canvas. You can manually add up to 50 domains to your whitelist. Wild cards are recommended (e.g. *.instructure.com). Canvas and Instructure domains are included automatically and do not count against your 50 domain limit.

Inherit Content Security Policy

Enable Content Security Policy
To manage the Content Security Policy from the sub-account level, disable the Inherit Content Security Policy toggle [1] and enable the Enable Content Security Policy toggle [2].

**Disable Content Security Policy**

**Canvas Content Security Policy**

The Content Security Policy allows you to restrict custom JavaScript that runs in your instance of Canvas. You can manually add up to 50 domains to your whitelist. Wild cards are recommended (e.g. *.instructure.com). Canvas and Instructure domains are included automatically and do not count against your 50 domain limit.

[X] Inherit Content Security Policy

[X] Enable Content Security Policy

To disable the Content Security Policy for the sub-account, disable the Enable Content Security Policy toggle.
Manage Individual Course Settings

1. more options
   - fewer options
   - Let students self-enroll by sharing with them a secret URL or code
   - Show recent announcements on Course home page
     - Number of announcements shown on the homepage
   - Let students attach files to discussions
   - Let students create discussion topics
   - Let students edit or delete their own discussion posts
   - Let students organize their own groups
   - Hide totals in student grades summary
   - Hide grade distribution graphs from students
   - Disable comments on announcements

2. Disable Content Security Policy

3. Update Course Details

The Content Security Policy automatically applies to all courses in the account or sub-account where the policy is enabled.

To disable the Content Security Policy for the course, navigate to the course Settings page and click the more options link [1].

Click the Disable Content Security Policy checkbox to disable the policy for the course [2].

To save your changes, click the Update Course Details button [3].
How do I access the Canvas beta environment as an admin?

The beta environment allows you to explore new features before they reach production. The beta environment is overwritten with data from the production environment every Saturday. Any work or content you add to your beta environment will be overwritten every week.

If you want to keep up on the latest beta features in Canvas, visit the Release Notes page in the Canvas Community.

The beta environment is separate from the test environment, which is overwritten with data from the production environment every three weeks and allows you to test using your real data without ruining the experience for your users. Learn more about the different Canvas environments.

Notes about the Beta Environment:

- All users can access the Canvas beta environment, but students cannot access course content beyond the Dashboard; if you want to allow students to view all course content, please contact your Customer Success Manager.
- Notifications, including course invitations and report downloads, cannot be sent in the beta environment.
- Canvas DocViewer can be used in the beta environment, but new and updated DocViewer features are not available for testing.
- Canvas Commons can be used in the beta environment, but new and updated Commons features are not available for testing.
- Quizzes.Next can be used in the beta environment, but reports, statistics, item bank search, and item bank tagging are not currently supported. Outcomes added to Canvas in the beta environment after the beta refresh will not display in the Quizzes.Next beta environment.
- Any changes you want to keep in the beta environment must be made directly within the production environment before beta is reset.
- LTI tools (External Apps) are typically not available outside the production environment. LTI tools may display in the beta environment, but often they are only configured for the production environment. Using production-configured LTI tools in the beta environment will affect live data. If you have permission to edit LTI tools, you can confirm the configuration for a specific LTI tool in your course or account. Please contact your Customer Success Manager for specific questions.
- Account-level user page views always reflect activity from the production environment.
- Feature option settings are not copied from the production environment. Feature options must be managed individually in the beta environment.

Access Beta Environment

[https://canvas.beta.instructure.com/login](https://canvas.beta.instructure.com/login)
To log in to your beta environment, type [organization name].beta.instructure.com into the URL field.

**View Test Installation Message**

Users in the beta environment will see a pink bar across the bottom of the screen indicating the user is in a Canvas Test Installation. Beta environments reset every Saturday and any content created in this environment will be deleted. If you want to save any course content created in your beta environment, you can export your course.

**Note:** To hide the pink bar across the bottom of your screen, double-click on the words **Canvas Test Installation**.
Manage Canvas Features

Some new features may be released as opt-in only and will not appear until you enable them in your beta environment. You can view these features in the **Feature Options** tab within Account or Course Settings.
How do I access the Canvas test environment as an admin?

In the test environment, you can test using your real data without messing up your live production environment. Here you can add users, change the CSS, and/or troubleshoot issues without ruining the experience for your users. The test environment is overwritten with data from the production environment every three weeks. You can configure your test environment with production-ready features, such as access to your institution's login authentication system.

If you want to keep up on the latest production features in Canvas, visit the Release Notes page in the Canvas Community.

The test environment is separate from the beta environment, which is overwritten with data from the production environment every week and allows you to explore new features before they reach production. Learn more about the different Canvas environments.

Notes about the Test Environment:

- All users can access the Canvas test environment, but students cannot access course content beyond the Dashboard; if you are an admin and want to allow students to view all course content, please contact your Customer Success Manager.
- Notifications, including course invitations and report downloads, cannot be sent in the test environment.
- Quizzes.Next is not supported in the Canvas test environment.
- Any changes you want to keep in the test environment must be made directly within the production environment in order to affect live data.
- LTI tools (External Apps) are typically not available in the outside the production environment. LTI tools may display in the test environment, but often they are only configured for the production environment. Using production-configured LTI tools in the beta environment will affect live data. If you have permission to edit LTI tools, you can confirm the configuration for a specific LTI tool in your course or account. Please contact your Customer Success Manager for specific questions.
- Account-level user page views always reflect activity from the production environment.
- Feature option settings are never copied from production and always retain their default settings. Feature options must be managed individually in the test environment.

Access Your Test Environment

To log into your test environment, type [organization name].test.instructure.com into the URL field.
View Test Installation Message

Users in the test environment will see a pink bar across the bottom of the screen indicating the user is in a Canvas Test Installation. Test environments are reset every three weeks after the production release, and any changes you make in your test environment will be reset. If you want to save any course content created in your test environment, you can export your course.

**Note:** To hide the pink bar across the bottom of your screen, double-click the **Canvas Test Installation** bar.
Manage Canvas Features

Some new features may be released as opt-in only and will not appear until you enable them in your test environment. You can view these features in the Feature Options tab within Account or Course Settings.
SIS Imports
What student information system (SIS) integrations are available in Canvas?

Canvas has built-in support for a number of different SIS systems. Canvas can also support integrations with arbitrary SIS systems or other user management tools through its SIS CSV interface.

All SIS systems can integrate with Canvas and send assignment submissions back to its system. Depending on your account’s enabled SIS feature option, you can manage various SIS validations and assignment sync settings.

For more information about SIS integrations, visit the Canvas Community Admin Group.

Canvas

Canvas-managed SIS Integrations have native functionality to configure, monitor, and run data exchange processes to and from Canvas. Contact your Customer Success Manager or Implementation Consultant for details:

- Banner with the Luminis Messaging Broker (LMB)
- Clever*
- CSV File Exchange*
- PowerSchool
- Skyward
- Aspire*

*Instructor documentation is currently not available for this integration.

SIS Vendors

Vendor-managed SIS Integrations allow external partners to supply data integrations using Canvas open APIs. Contact your Customer Success Manager or Implementation Consultant for details:

- Genius SIS
- JMC
- RenWeb
- Sungard eSchoolPlus
- eSchool Data

Canvas Professional Services

SIS Integrations via Professional Services allow customers to use an integration for a fee. Contact your Customer Success Manager or Implementation Consultant for details:
• Senior Systems
• Aeries
• CampusVue
• Jenzabar

Other Integrations

All other integrations are built using the SIS Imports API and CSV files.

For more information please contact your Customer Success Manager. For general inquiries please contact info@instructure.com.

For details of the Canvas SIS import format, please see the Canvas SIS Import Format Documentation and our API documentation.
How do I import SIS data to a Canvas account?

SIS data can be uploaded through the SIS Imports link in Account Settings. SIS data is only accessible at the account level and cannot be added to sub-accounts.

The SIS Import page supports a few formats for standard imports to Canvas: Instructure formatted CSV or zipfile of CSVs, IMS Enterprise Specification XML zip, or Banner Grade Exchange Results XML. Files can be set for a full batch update and to override UI changes.

Please ensure you are aware of the risks associated with these upload options. For more details about these risks, please view the SIS Imports lesson.

API Processing

SIS Imports are added to a queue that processes each imported CSV separately (whether uploaded individually or within a ZIP file). Import errors are displayed in the SIS Import page.

API Practice

Before importing SIS information, practice using the API to manage SIS data. You should also use your test environment to avoid conflicts with your live production data. Once you have confirmed your data in your test environment, you can re-apply your SIS integration to your production environment. Additionally, some SIS data options are only available via the API.

Notes:

- SIS Imports must be enabled by your Customer Success Manager before files can be uploaded to your account.
- Importing SIS files is an account permission. If you do not have access to manage SIS files, your institution has restricted this feature.
- Before setting permission for a user role, you must ensure the role you want to assign the user already exists in your account. Learn how to create an account-level role.
Open SIS Import

In Account Navigation, click the SIS Import link.

Select File

SIS Import

Select the zip file that you want imported.
For a description of how to generate these zip files, please see this documentation.

Choose File  No file chosen

Click the Choose File button and locate the SIS import file from your computer.
Select Import Type

**SIS Import**

Select the zip file that you want imported.
For a description of how to generate these zip files, please see this documentation.

- Choose File: SISImportPackage.zip

Import type: Instructure formatted CSV or zip

In the **Import Type** menu, select the type of import you are uploading into Canvas. By default, the menu selects the CSV import option.

Set Full Batch Update

1️⃣ This is a full batch update

If selected, this will delete everything for this term, which includes all courses and enrollments that are not in the selected import file above.
See the documentation for details.

Term: Default Term

If you want to create a full batch update, select the **This is a full batch update** checkbox [1]. In the Term drop-down menu [2], select the term for the full batch update. With this option, any courses, sections, or enrollments with an SIS ID record in Canvas that is linked to the Term selected in the drop-down can be deleted. For enrollments, this option means the linked user and course/sections require SIS IDs. A Canvas record will be deleted if it is not included in the current import file.

This option will only affect data created via previous SIS imports. Manually created courses, for example, won't be deleted even if they don't appear in the new SIS import.
Notes: Ensure you are aware of the associated risks before selecting this option.

Override UI Changes

By default, UI changes have priority over SIS import changes; for a number of fields, the SIS import will not change that field's data if an admin has changed that field through the UI. If you select this option, this SIS import will override UI changes.
See the documentation for details.

If you want to override changes in the user interface (UI), select the **Override UI changes** checkbox. This change tells Canvas to overwrite any "sticky" data changed by users in their accounts with the data you are importing.

- If this box is NOT checked when doing a new users import, no name changes will be overridden in the UI, but if the user removed their listed email address it will be re-added but not marked default.
- If this box IS checked when doing a new users import, the full name and sortable name will change, but the display name is not changed. The email address is added but still not marked default.

Select UI Option

- **Override UI changes**
  By default, UI changes have priority over SIS import changes; for a number of fields, the SIS import will not change that field's data if an admin has changed that field through the UI. If you select this option, this SIS import will override UI changes.
  See the documentation for details.

- **Process as UI changes**
  With this option selected, changes made through this SIS import will be processed as if they are UI changes, preventing subsequent non-overriding SIS imports from changing the fields changed here.

- **Clear UI-changed state**
  With this option selected, all fields in all records touched by this SIS import will be able to be changed in future non-overriding SIS imports.
Overriding UI changes also allows one of two additional options: process as UI changes or clear UI-changed state. You can only select one option.

If you want to select an options, select the checkbox next to your preference:

- **Process as UI changes [1]**: overrides changes that have taken place in the UI as "sticky" data; all data acts as if the changes were actually manually updated in the UI
- **Clear UI-changed state [2]**: removes the "stickiness" of all data that exists in this import; future imports with this data will not indicate any data in the UI as "sticky"

Process Data

Click the Process Data button.
View Import Data

SIS Import

The SIS data was imported but with these messages:

- Warnings
  - BasicScriptFlowchart.png - Skipping unknown file type
  - user_observers.csv - An observer referenced a non-existent user 15431
  - user_observers.csv - An observer referenced a non-existent user 15432
  - user_observers.csv - An observer referenced a non-existent user 15433
  - enrollments.csv - Could not find account school.instructure.com

- Imported items
  - Accounts: 13
  - Terms: 10
  - Courses: 11
  - Sections: 10
  - Users: 10
  - Enrollments: 0

When the import has processed, Canvas displays the results of the imported file, along with up to 50 errors and warnings. If you imported a full batch update, the results also show the number of deleted items removed from the account. Deleted items include enrollments, courses, and sections.

After you refresh the page, this information will stay in the SIS Import page under the Last Batch heading until another import is made.
Download Errors

Last Batch

Started: Jul 15 at 7:40pm
The SIS data was imported but with these messages:

Download the complete list of errors and warnings here.

- Warnings
  - BasicScriptFlowchart.png - Skipping unknown file type
  - user_observers.csv - An observer referenced a non-existent user 15431
  - user_observers.csv - An observer referenced a non-existent user 15432
  - user_observers.csv - An observer referenced a non-existent user 15433
  - enrollments.csv - Could not find account school.instructure.com

- Imported Items
  - Accounts: 13
  - Terms: 10
  - Courses: 11
  - Sections: 10
  - Users: 10
  - Enrollments: 0

If you want to download all warnings and errors from your last import file, return to the SIS Import page. Under the Last Batch heading, click the Last Batch download icon. The icon will download a CSV file with all errors and warnings from your last import.

You can also use the SIS Import Errors API for additional troubleshooting details, which will return the CSV line number where the error occurred.

Note: You may need to refresh the page to view the download icon.
How do I format CSV text files for uploading SIS data into a Canvas account?

Canvas allows you to manually bulk create users, accounts, terms, courses, sections, and enrollments through the Admin interface.

This document references the SIS Import CSV Format API page, where the majority of the CSV information is located. Each CSV file is symbiotic with another and tell Canvas how to manage all information for the account. View the SIS relationship diagram.

Each step in this lesson provides sample CSV files with descriptions of each required and optional field. You will also find a link to download each file if you want to take a deeper look at the formatting. Download a zipped package of all sample files.

You should practice importing data in your Canvas test environment before importing any content to your production environment.

CSV File Format

In order to bulk upload data into Canvas, you must create one or more CSV text files. CSV files can be generated by many programs. Student Information Systems (SIS) often have a method for generating reports in CSV format that can be modified to fit the format Canvas requires. If you do not know how to save a file in a CSV format, please check the documentation for the program you are using to create your CSV file (e.g., Excel).

When using the Instructure format for importing files in the SIS Import page, you may import an individual CSV text file or you may compress multiple files into a single ZIP file to bulk import data. If you are manually uploading individual files, the files must be uploaded in the order shown in this lesson.

CSV Field Formatting

The first row of your CSV file (header) must include the complete field name for each file. The order of the columns does not matter but having the rows ordered properly is crucial for files like the accounts.csv.

Sticky Fields

By default, certain changes made in the user interface are not overwritten by future SIS imports and are specified as being sticky. All sticky fields are identified in this document. You can override these fields by setting override_sis_stickiness in the API or checking the Override UI changes checkbox in the SIS Import page.

API Documentation

CSV files only include a specific set of fields. Canvas contains additional values that are available through each individual API. After running the CSV files for your institution, standard practice for a majority of institutions is to upload all SIS CSV files and then use the Canvas API to update full account and course attributes. For more information, view the Canvas API documentation for Users, Accounts, Terms, Courses, Sections, Enrollments, and Groups. SIS Imports can also be managed using the SIS Imports API.
users.csv

Users are the people who have user accounts within an institution. The users.csv adds people into the system as generic users. The enrollments.csv will assign a role (teacher, student, etc.) to these users. When a user account is deleted all of their enrollments will also be deleted and they won’t be able to log in to their Canvas account. If you still want the user to be able to log in but just not participate or if you want to only delete them from a particular course, then you should leave their user account as active and change their enrollment (in the enrollments.csv) to completed or deleted, respectively.

Download a sample users.csv file with 10 Canvas user accounts.

Required Field* | Sticky Field^

- **user_id**: This is a unique value used to identify anyone with an account in Canvas. This value must not change for the user, and must be unique across all users. In the user interface, this is called the SIS ID and may be comprised of any combination of characters. You can find this SIS ID by visiting any user account and then viewing their Login Information.
- **integration_id**: This is a secondary unique identifier useful for more complex SIS integrations. This identifier must not change for the user, and must be globally unique.
- **login_id**: This is the username one will use to log in to Canvas. If you have an authentication service configured (like LDAP), this will typically match their username in the remote system. Login_id can contain letters, numbers, or the following symbol characters: - _ = + . @
- **password**: If the account is configured to use LDAP or an SSO protocol, then this isn’t required. Otherwise, this is the password for the 'login_id' above. This password must be at least 8 characters.
- **ssha_password**: Instead of a plain-text password, you can pass a pre-hashed password using the SSHA password generation scheme in this field. While better than passing a plain text password, you should still encourage users to change their password after logging in for the first time. Learn how to generate SSHA passwords.
- **authentication_provider_id**: This is the authentication provider the login is associated with. Logins associated with a specific provider can only be used with that provider. Legacy providers (LDAP, CAS, SAML) will search for logins associated with them, or unassociated logins. New providers will only search for logins explicitly associated with them. This can be the integer ID of the provider, or the type of the provider (in which case, it will find the first matching provider).
- **first_name**: This is the given (first) name of the user. If present, used to construct full_name and/or sortable_name.
- **last_name**: This is the surname (last) name of the user. If present, used to construct full_name and/or sortable_name.
- **full_name**: This is both the given and surname of the user. Omit first_name and last_name if this is provided.
- **sortable_name**: This is the sortable name option in Canvas, usually inferred from the user’s name but it can be customized.
- **short_name**: This is the display name of the user, usually inferred from the user’s name but it can be customized.
- **email**: This is the institution-assigned email address and will also be marked as the default email address for this user account. This email address should still be provided even if it is the same as the user's login_id.
- **status**: This is where you can add or remove a user from Canvas. Mark as active to add a user or deleted to remove an existing user.
Email Address Conflicts

Canvas identifies users by email address. When students are added to a course, Canvas attempts to reconcile any email address conflicts when the user first logs in to the course.

Normally email addresses are unique to each student. At times multiple students may share a single email address. When adding students to courses via SIS import, Canvas recognizes when an email address is assigned to more than one student.

- If a new SIS ID is associated with an email address already assigned to an existing SIS ID, Canvas sends an email to the email address.
- When users are added to an account through SIS import, they will not receive an email notification unless the system detects a duplicate user. However, if a user is added or enrolled manually they will receive an email notifying them they have been added or enrolled in a new course. The student sharing an email address will receive a notification that the email address is already in use and is invited to create a new account in Canvas. This process may also apply when adding a user to a course enrollment.

accounts.csv

An account is an organization unit within Canvas (e.g., the parent account for an institution). Each account can contain a hierarchy of sub-accounts, such as creating accounts for individual colleges within an institution, or for individual schools within a district. Sub-accounts can also contain multiple sub-accounts, such as when a college subdivides into departments or programs, or a school that subdivides into grade levels or subjects.

Download a sample accounts.csv file with the following sub-accounts:

- 3 sub-accounts within your main/root account. (Arts & Humanities, Business, Math & Science)
- 4 sub-accounts within your Business sub-account. (Accounting, Computer Science, Economics, and Marketing)
- 3 sub-accounts within your Math & Science sub-account. (Biology, Physics, and Statistics)
- 1 sub-account within your Arts & Humanities sub-account. (Visual Arts)
- 2 sub-accounts within your Visual Arts sub-account. (Photography, and Digital Media)

Required Field* | Sticky Field^:

- account_id*: This is a unique identifier used to create a sub-account. The courses.csv file will allow you to assign courses to a particular account id. This unique identifier must not change for the account, and must be globally unique across all accounts. In the Canvas UI, this is called the SIS ID and can be modified by visiting the Settings for each respective sub-account.
- parent_account_id^: This identifier indicates that a sub-account should be nested beneath this parent account. If this field is blank then the sub-account will be nested beneath your root or main account. Note that even if all values are blank, the column must be included to differentiate the file from a group import.
- name*: This is the name for the sub-account.
• **status**: This is how you can create or remove a sub-account. Mark as *active* to add a sub-account or *deleted* to remove an existing sub-account.

• **integration_id**: This is a secondary unique identifier useful for more complex SIS integrations. This identifier must not change for the account, and must be globally unique.

### terms.csv

A [term](#) provides a default set of start and end dates to any course assigned to that term. Term dates for courses can be manually managed at the course level without an import file. However, attaching a term_id to many different courses ensures all courses in that term begin/end at the same time. Uploaded term dates will also help you sort and organize courses when viewing data and reports in the Admin interface.

[Download a sample terms.csv file](#) with 10 terms.

**Required Field** | **Sticky Field**

• **term_id**: This is a unique identifier for the term. The courses.csv will allow you to reference this term_id so your courses know when to start and when to conclude. This identifier must not change for the term, and must be globally unique across all terms. In the user interface, this is called the SIS ID.

• **name**: This is the name of your term. Come up with a good naming convention that will help you easily reference your terms. There are many admin tools that allow you to search or query data by the term name.

• **status**: This is how you can create or remove a term. Mark as *active* to add a term or *deleted* to remove an existing term.

• **start_date**: This is the date the term begins. The format should be in [ISO 8601](#): YYYY-MM-DDTHH:MM:SSZ (The T may be replaced with a space, as seen in the example screenshot.) For example August 26, 2013 at 5:00pm EST would be written 2013-08-26T17:00-5:00

• **end_date**: This is the date the term ends. The format should be in [ISO 8601](#): YYYY-MM-DDTHH:MM:SSZ (The T may be replaced with a space, as seen in the example screenshot.) By default, user access is cut off at midnight on your indicated end date, meaning the previous day is the last full day that users have access to the term. Best practice is to set your end date to the day after the term ends.

• **integration_id**: This is a secondary unique identifier useful for more complex SIS integrations. This identifier must not change for the term, and must be globally unique.

• **date_override_enrollment_type**: This allows you to set or remove start and end dates for a specific enrollment type within an existing term. When set, all columns except term_id, status, start_date, and end_date to be ignored for the row. If status is set to active, the term dates will apply only to enrollments of the given type. If status is set to deleted, the currently set dates will be removed for the given enrollment type. Enrollment type can be set to StudentEnrollment, TeacherEnrollment, TaEnrollment, or DesignerEnrollment.

### courses.csv

A course is an organized presentation about a particular subject. Sometimes a course may include a series of courses. Courses are placed within terms to create default start and end dates. However, if a course includes specific course dates, these dates
will override the student access dates on the term, identified by the term_id (if included.) The value of attaching a term_id is that you will be able to sort and organize the courses when viewing data and reports, in the Admin interface. A term_id can be easily attached to many different courses that begin/end at the same time. If you do not link a course to a term then the course will be linked to the term called Default Term.

If your institution has enabled Blueprint Courses, you can use a courses.csv to add associated courses to a blueprint course. Please note that the blueprint course must be created and enabled as a blueprint course before associated courses can be added.

*Download a sample courses.csv file* with 10 courses; they reside within their respective sub-accounts in a specific term.

**Required Field** | **Sticky Field**
---|---
• **course_id**: This is a unique identifier used to differentiate courses within Canvas. This identifier must not change for the course and **must be globally unique across all courses**. In the user interface, this is called the SIS ID.
• **short_name**: This is a short name for the course. In the Canvas UI this is also called the **Course Code** or **Reference Code**.
• **long_name**: This is a long (full) name for the course. (This can be the same as the short name, but if both are available, it will provide a better user experience to provide both.)
• **account_id**: This is the unique SIS ID account identifier (from the accounts.csv) which tells the course under which sub-account it will reside. If an account_id is not specified then the course will be attached to your main/root account. The SIS ID can be found in the subaccount’s Settings.
• **term_id**: This is the unique term identifier (from the terms.csv) which tells the course when to begin and when to conclude. If associating a term_id with a course you do not need to enter a start_date or end_date.
• **status**: This is how you can create, remove, or conclude a course. Mark as **active** to add a course or **deleted** to remove an existing course, or **completed** to conclude an existing course.
• **integration_id**: This is a secondary unique identifier useful for more complex SIS integrations. This identifier must not change for the course, and must be globally unique.
• **start_date**: This is the date the course begins. The format should be in **ISO 8601**: YYYY-MM-DDTHH:MM:SSZ (The T may be replaced with a space.)
• **end_date**: This is the date the course ends. The format should be in **ISO 8601**: YYYY-MM-DDTHH:MM:SSZ (The T may be replaced with a space). By default, user access is cut off at midnight on your indicated end date, meaning the previous day is the last full day that users have access to the course. Best practice is to set your end date to the day after the course ends.
• **course_format**: This is the format for the course. The format can be **online**, **on_campus**, or **blended**.
• **blueprint_course_id**: This is the course ID of the blueprint course to which you want to add an associated course. To remove the Blueprint Course link you can pass ‘dissociate’ in place of the ID. In the user interface, this is the SIS ID of the blueprint course.

**sections.csv**

A **section** subdivides students within a course. Multiple sections can also be cross-listed into one course, especially if all student sections are learning the same course material. Multiple sections can be placed in one course, but a section cannot contain
multiple sections. Sections inherit the course dates as set by the term. However, if a section includes specific dates, these dates will override the student access dates for the course and the term start and/or end dates.

If you are trying to delete a course and the users are associated with sections, you'll need to include the section_id parameter in the CSV import as well as the section SIS IDs.

Download a sample sections.csv file with the following sections:

- 4 sections in the ACCT300 - Cost Accounting course
- 4 sections in the ACCT310 - Managerial Accounting course
- 2 sections in the BIO101 - Intro to Biology course

This file assumes that you may have multiple sections within one course. Many institutions import course sections as separate courses. This can be done by (1) creating a Canvas course for each section in your courses.csv, then (2) creating a single section in each of these courses. You may use essentially the same data for the course and section including the SIS ID which will be the same for both the course_id and section_id.

**Required Field* | Sticky Field^

- **section_id**: This is a unique identifier used to create sections within a course. This identifier must not change for the section, and must be globally unique. In the user interface, this is called the SIS ID.
- **course_id**: This is the unique identifier of the course where the section will be added or deleted (added in courses.csv).
- **name**: This is the name of the section. Sections are ordered alphabetically by name.
- **status**: This is how you can create or remove a section within a course. Mark as active to create a section or deleted to remove an existing section.
- **integration_id**: This is a secondary unique identifier useful for more complex SIS integrations. This identifier must not change for the section, and must be globally unique.
- **start_date**: This is the date the section begins. The format should be in ISO 8601: YYYY-MM-DDTHH:MM:SSZ (The T may be replaced with a space).
- **end_date**: This is the date the section ends. The format should be in ISO 8601: YYYY-MM-DDTHH:MM:SSZ (The T may be replaced with a space). By default, user access is cut off at midnight on your indicated end date, meaning the previous day is the last full day that users have access to the section. Best practice is to set your end date to the day after the section ends.

**enrollments.csv**

An **enrollment** is a user who has been enrolled in a course under a specific role. An enrollments.csv allows you to assign roles to users and place them into the appropriate courses. When the enrollment status of any user is marked as completed they will be limited to read-only access for that course.

Download a sample enrollments.csv file with the following enrollments:

- 1 user as a teacher in the ACCT300 - Cost Accounting course
- 1 user as ta in the ACCT300 - Cost Accounting course
- 1 user as a designer in the ACCT300 - Cost Accounting course
• 3 users as students in section 1 of the ACCT300 - Cost Accounting course
• 3 users as students in section 2 of the ACCT300 - Cost Accounting course
• 1 user as an observer of a student in section 1 of the ACCT300 - Cost Accounting course

**Required Field**

• **course_id**: *(Required if the section_id is missing)* This is a unique identifier for the course where the user will be enrolled (added in courses.csv). If enrolling students into the course rather than a specific section, put the course_id in this field. Otherwise, leave it blank.

• **root_account**: This is the domain of the account to search for the user.

• **user_id**: This is the unique identifier of the user that will be enrolled within the designated courses (added in users.csv). If the user_integration_id is present, this field will be ignored.

• **user_integration_id**: *(Required if the user_id is missing)* This is the secondary unique identifier of the user (added in users.csv as the integration_id).

• **role**: This is the role that a user will will be assigned to a user for the designated course. You enroll a user to be any of the following roles: teacher, designer, ta, student, observer or a custom role that you define. Each role has a permission set that Admins can customize at the main/root account or sub-account level.

• **role_id**: *(Required if role is missing)* This is the unique identifier for the role in which the user will be added as part of an enrollment.

• **section_id**: *(Required if the course_id is missing)* This is the unique identifier for the section in which the user will be enrolled (added in sections.csv). If enrolling students in a specific section of a course, put the section_id of the section here. Otherwise, leave this field blank. If no section_id is specified the default section for the course will be used. If a default section does not exist, one will be created automatically without an SIS ID.

• **status**: This is how you enroll, conclude, deactivate (make inactive), or remove an enrollment in a course. Mark as **active** to enroll a user in a course, **completed** to conclude a user’s enrollment in a course, **inactive** to deactivate the user in the course, and **deleted** to remove a user from a course. When in an 'inactive' state, a student will be listed in the course roster for instructors but will not be able to view or participate in the course until the enrollment is activated.

• **associated_user_id**: *(Observer role only)* This is the unique identifier of the user whose information (including grades) the observer will be able to view. The observer should be enrolled in the same course/section as the user you would like them to observe. This field will be ignored for any role other than observer.

• **limit_section_privileges**: This is how to designate that the enrollment will allow the user to only see and interact with users enrolled in the section given by course_section_id. This field defaults to false. Limiting students to interact by section only affects Collaborations, Chat, People, and Conversations. When enrolling instructors and TAs, section limitations allow those users to grade students in their same section(s). Discussion topics and Pages are not affected by section limitations and can be viewed by any student. These feature areas could be restricted by creating content in course groups.

**group_categories.csv**

Group categories allows you to organize groups in Canvas. A group_categories.csv allows you to create group categories at the account or course level. In the user interface, group categories are called group sets.
Download a sample group_categories.csv file with the following group categories:

- Admin Groups
- Designer Groups
- History Project Groups

**Required Field** | **Sticky Field**

- **group_category_id**: This is the identifier used to reference the group category. The identifier must not change for the group category, and must be globally unique.
- **account_id**: This is the identifier that attaches the group category to an account (added in accounts.csv). If no account or course is specified, the group will be attached to the root account.
- **course_id**: This is the identifier that attaches the group category to a course (added in courses.csv). If no course or account is specified the group will be attached to the root account.
- **category_name**: This is the name of the group category.
- **status**: This is the status of the group category. Mark as active to create the group category or deleted to delete the group category.

**groups.csv**

A group can be used to provide collaborative opportunities for students, instructors, admins, or other users. A groups.csv allows you to create course-level and account-level groups. Groups uploaded via SIS can only be updated or deleted via SIS.

Download a sample groups.csv file with the following groups:

- Admins
- Math Teachers
- Designers

**Required Field** | **Sticky Field**

- **group_id**: This is the unique identifier used to reference your group. It must not change for the group, and must be globally unique.
- **group_category_id**: This is the identifier of the group category (added in group_categories.csv) into which you are adding a group. If no group category is specified, the group will be placed in the default group category for the defined account or course. If no account or course is specified, the group will be placed in the default group category for the root account.
- **account_id**: This is the identifier that attaches the group to an account (added in accounts.csv). If none is specified, the group will be attached to the root account.
- **course_id**: This is the identifier that attaches the group to a course (added in courses.csv). If no course or account is specified the group will be attached to the root account.
- **name**: This is the name of the group.
- **status**: This is the status of the group. Mark as available to set the group open for membership or deleted to delete the group.
groups_membership.csv

Membership in a group allows users to collaborate on activities in Canvas. A groups_membership.csv allows you to bulk add or remove people to a group you have created via groups.csv.

Download a sample groups_membership.csv file with the following group memberships:

- 1 accepted user in the Admins group
- 1 accepted user in the Math Teachers group
- 1 deleted user in the Math Teachers group

Required Field*

- **group_id***: This is the unique identifier used to reference your group (added in groups.csv).
- **user_id***: This is the unique identifier of the user you want to add to the group (added in users.csv).
- **status***: This is the status of the users in the group. Mark as accepted to add a user to a group or deleted to remove a user from a group.

xlists.csv

Cross-listing allows you to move sections into another course. A xlist.csv file allows you to cross-list sections into existing courses and create a section hierarchy.

Section ids are expected to exist already and already reference other course ids. If a section id is provided in this file, it will be moved from its existing course id to a new course id, such that if that new course is removed or the cross-listing is removed, the section will revert to its previous course id. If xlist_course_id does not reference an existing course, it will be created. If you want to provide more information about the cross-listed course, please do so in courses.csv.

Download a sample xlists.csv file with the following courses and sections:

- 4 active sections from the ACCT300 - Cost Accounting course cross-listed into the ACCT310 - Managerial Accounting course

Required Field*

- **xlist_course_id***: This is the identifier of the new course (added in courses.csv).
- **section_id***: This is the identifier of the section (added in sections.csv).
- **status***: This is the status of the section. Mark as active to make the section active or deleted to remove the section.

user_observers.csv

The observer role can be used to enroll parents and link them to a student, allowing them to view their student's grades and course interactions. A user_observers.csv allows you to enroll and link observers to each of the designated student's enrollments.
Download a sample user_observers.csv file with the following enrollments:

- 2 active observers
- 1 deleted observer

**Required Field**

- **observer_id**: This is the unique identifier of the observer (added as the user_id in users.csv).
- **student_id**: This is the unique identifier of the student (added as the user_id in users.csv).
- **status**: This is the status of the observer. Mark as **active** to enroll the observer for each of the student's enrollments or **deleted** to remove all the observer's enrollments.

**admins.csv**

Admins manage settings for an entire account or subaccount. An admins.csv allows you to designate users in Canvas as account admins or other custom account or subaccount roles.

Download a sample admins.csv file with the following admins:

- 2 active account admins
- 1 deleted account admin
- 2 active custom account roles

**Required Field**

- **user_id**: This is the unique ID of the user you would like to designate as an admin (added in users.csv).
- **account_id**: This is the unique identifier of the account in which you would like the admin to reside (added in accounts.csv).
  
  If this column is left blank, the user will reside in the root account. This column is always required, even if the value is blank.
- **role_id**: (required if role is missing) This is the ID of the role, either the default ID or a custom ID defined by the account.
- **role**: (required if role_id is missing) This is the name of the role, either the default Account Admin role or a custom role defined by the account. If you are adding an account admin, format the field to read 'AccountAdmin'. If you are adding a custom role, format the field exactly as it appears in the Canvas UI.
- **status**: This is the status of the admin. Mark as **active** to create an active admin or **deleted** to remove an admin.
- **root_account**: This is the domain of the account to search for the user.

**change_sis_id.csv**

A SIS ID is a unique identifier for an object in Canvas. A change_sis_id.csv allows you to bulk change SIS IDs for existing accounts, terms, courses, sections, groups, or users.

Download a sample change_sis_id.csv file with the following SIS ID changes:

- 1 user SIS ID change
- 1 course SIS ID change
1 term SIS ID change

**Required Field**

- **old_id**: This is the current SIS ID of the object.
- **new_id**: This is the desired SIS ID of the object. The new SIS ID must be currently unique to the object type and the root account.
- **type**: This is the type of object. Type can be account, term, course, section, group, or user.
How do I create an automated data integration for an account with Canvas and my SIS?

Student Information System (SIS) Imports are a great way to manually import bulk data (or changes) into the Canvas system. This lesson will provide the basic lessons on how to use the Canvas API and the programming language of your choice to set up an automated system to manage your SIS import workflow.

Several programming languages can be used to build an automated integration tool with Canvas. If your preferred programming language can make Secure Socket Layer (SSL) web calls (HTTPS) to an external server and has the ability to post files, you can apply the steps in this lesson to the programming language of your choice (or just install cURL and write a batch file). This lesson provides a simple approach to setting up a basic automated import system. However, you may want to develop a more complex system based on your skills and the abilities of your specific SIS integration.

Testing Data Integrations

To avoid affecting data in your production environment, you may want to set up your SIS integration in your test environment for accurate testing. Every three weeks, the day after a new Canvas production release, your production environment will create an updated copy for your test environment so you can test with up-to-date data. Once you have confirmed your data works correctly, you can re-apply your SIS integration to your production environment.

Alternatively, you can create your changes in your production environment, then wait for the next refresh before you begin practicing in your test environment.

Advanced Help

- Canvas Community Migrations and Integrations Group
- Canvas API Documentation
- SIS Imports via Canvas API (automated)
- SIS Imports via Canvas UI (manual)
Open Account

Click the Admin link [1], then click the name of the account [2].
Modify User Role and Permissions

In Account Settings, open the Permissions link. In the Account Roles tab, create an account-level user role and allow the user to manage SIS data. If you do not want to create a new user role, you can use an existing user role and modify the permissions.
Manually Add New User

You'll need to manually add a new user to manage the SIS data. You can use an existing user imported via SIS, but manually creating a new user is beneficial for security purposes. This new user will end up with only one permission, but that one permission grants the ability to create, modify, and delete many object types in Canvas.
Add User as Admin

Add Account Admins

Add More  SIS Admin

Copy and paste a list of email addresses to add users.

andy.ad.canvas@gmail.com

Sample format: "Example Student" <student@example.com>, "Lastname, Firstname" <firstlast@example.com>, justAnEmailAddress@example.com

To enable SIS permissions, add your admin as an administrative user to your account. Set the user with the user role where you enabled the SIS data permission.
Obtain API Access Token

Log out of Canvas and then log back in as the new user. In User Settings under Approved Integrations, add a new access token. Leave the expiration date blank unless you have a reason to specify a date. Learn how to obtain an API access token.

Note: Be sure to save this API access token in a safe place. An API access token is effectively the same as a username and password, so treat it with similar security. Remember that the token created in your test environment will be replaced by the token created in your production environment during the next test environment refresh period.

Import Data via API

Practice importing data via the API. One API method is using cURL, a command line tool for transferring data that is supported on all operating systems (Windows, Linux, and OSX). The API can show you how to practice importing a test file and checking the status of a previous import.

Learn more about using the API to import data into Canvas.
Create Import Script

Using your preferred programming language, create an SIS script. An SIS script automatically synchronizes the users in your institution with your Canvas account. View the SIS script flowchart.

The import script can be as simple or complex as your institution requires. Additionally, a variety of programming languages can be used to write your import script/program.

Learn more about creating a Canvas SIS script.

Export Data and Create Canvas CSV File

Export your SIS data in a Canvas CSV file format. Place the file(s) into a directory or folder that only contains CSV files ready to be imported. Depending on your SIS, this step may be automated. For more information on integration, please contact your Canvas Customer Success Manager.

SIS Exports

Due to extensive variations among Student Information Systems (SIS), this lesson cannot document one all-inclusive method for exporting data. However, here are a few possible data access methods that may be available to you:

- API access: The SIS may provide an API in some form that will allow you to collect data.
- Direct data (database access): The SIS may allow direct database (or other direct data) access to your SIS data.
- Report generation or data export: The SIS may have the ability to run reports or export data and have them delivered via email, from a web site/program, or saved to a folder.
- Trigger or tracking events: The SIS may have the ability to run jobs on a triggered event. This type of tracking may be better suited to direct API manipulation of Canvas objects, but you could have a script/program that collects the triggered changes for batch updates at frequent intervals using SIS imports.

Once you know how to access your SIS data, a script/program could be written and used to manipulate and filter the data to match the format required for CSV SIS imports. In some cases, you may have to manually perform this step. You will need to work with your SIS administrative team or vendor to work out the best way to export data.

**Note:** While working with your SIS team, be sure to provide them with the Canvas CSV file format documentation, which may reduce the complexity of or eliminate the need for a script/program to prepare the data before the import.
How do I practice using the API to import SIS data to a Canvas account?

When creating an automated data integration with Canvas, you should practice using the API to import SIS data to Canvas. One method of using an API is through cURL, a command line tool for transferring data that is supported on all operating systems (Windows, Linux, and OSX). In this lesson, examples should work with Windows 7+, Windows Server 2003+, Ubuntu 12+ (Desktop/Server), and OSX Mountain Lion+

The examples in this lesson are provided to help you learn how to practice using the API to import content into Canvas using SIS imports.

Install cURL

On your computer or operating system, ensure that cURL is installed properly on your computer or operating system.

**OS X & Linux (Ubuntu)**

CURL should already be installed and run from the **Terminal** application.

CURL may already be installed. If not already installed, run the following command with a user that has sudo privileges:

```
sudo apt-get install curl
```

After installing cURL, test the installation by typing the following command on a terminal or command prompt:

```
curl --version
```

If successfully installed, the version of cURL should be displayed.

**Windows**

If you are planning to use Windows as your import server you should consider using PowerShell instead of cURL for your production import tool. PowerShell is native to Windows and should result in a more reliable import script than using cURL and a batch file. We only recommend using cURL on Windows for testing purposes. [Learn how to install PowerShell on Windows.](#)

Import Test File

Practice using the API before adding the complexity of a script.

1. In the “tmp” directory, create a CSV file name `P<P>P>P` that will create a basic course. The file name is case sensitive. Or, you can also use this example file: `test_course.csv`
2. Open a terminal command prompt and change directory into the “tmp” directory.
3. Run the command below replacing `<api_token>` with the API token you created earlier and `<canvas_fqdn>` with the domain name you use to access Canvas (example: institution_name.test.instructure.com):

```
```

Upon success, you should receive a string of JSON back from the server that indicates the import has been created and provides an ID for the import job. The JSON will look something like:

```
```

The "id" and "workflow_state" parameters are important pieces of information to know as you develop your script. Their absence or value could indicate a problem. If you did not get an "id" parameter, or your "workflow_state" tag is anything other than `created`, you will need to troubleshoot the cause before proceeding.

**Note:** When this command is complete, you'll need the "id" parameter to check the status of an import.

### Check Import Status

An important part of the automated import process is to know the status of your previous import before processing your next import.

If you decide to do a standard import, you must fix the previous import before processing your next import because information may be lost from the failed/incomplete import job. If you are using full batch imports, the state is still important because you do not want to start your next full batch until the preceding batch has finished. Depending on your update frequency, size of import, and other factors, a full batch import could easily overrun your time window.

Run the following command with these replacements:

- Replace `<api_token>` with the API token created earlier
- Replace `<canvas_fqdn>` with your Canvas domain
- Replace `<import_id>` with the ID from your test file import

```
```

The command should return a JSON response that contains the status and result if the import is complete. The following is an example of result of the command run in the previous step:

```
```
Here are a few key points to consider regarding the JSON results:

**progress**: In a running job, the "progress" parameter indicates the percentage complete for the job. When a job is done running, the progress will be 100 percent.

**workflow_state**: The "workflow_state" parameter indicates the current state of a running job. In most cases, a successfully completed job will indicate a state of "imported." If you see anything other than "imported" or "importing," you will need to stop here and troubleshoot the cause before proceeding.

- If the state is "importing," try running the command again until the state returns "imported".
- If the state is "imported_with_messages" or "failed_with_messages," check the contents of "processing_warnings" or "processing_errors".
What do I need to know about creating a script to automatically import SIS data to a Canvas account?

When creating an automated data integration with Canvas, you need to create a script to automatically import data to Canvas. An SIS script automatically synchronizes the users in your institution with your Canvas account. This lesson presents programming languages and other considerations when creating a script file.

Script Programming Languages

The import script can be as simple or complex as your institution requires. Additionally, a variety of programming languages can be used to write your import script/program. As long as the programming language can make HTTPS calls and upload files via HTTPS the language can be used to create an import script.

Due to a tremendous amount of variables that exist among each institution, Canvas does not officially support or promote the use of any specific scripting language or script that users can import data to Canvas, such as:

- Bash Shell (cURL)
- C#
- Java
- PowerShell
- Python

Server File Folders

On the server or computer that will run the import process (Windows/Linux/Mac), you'll need to create a folder structure to store your import applications (script, logs, active files, etc).
Script Considerations

A simple example of an SIS script is to create a script that runs at specific times and checks a directory in your folder structure to see if there are files that need to be sent to Canvas. If there are files, the script could compress them into a .zip file and send them to Canvas. View the SIS script flowchart.

When creating a script, you should consider potential problems such as:

- Whether the script checks for errors to see if the upload succeeded.
- Whether the script looks to see if the last import is finished. If you set your run frequency shorter than the import processing time for a run, the frequency could result in new batches queuing before an import is finished.
- Whether the script looks to see if there is a previous import—and whether or not the previous import succeeded. This verification is important regardless of whether full batch or standard imports are used as you do not want updates to run out of order.

Sample Scripts

The Canvas Community has provided a GitHub repository of sample scripts that address many script considerations. Even with very simple tools, these examples show how to implement a basic automated import script.

Note: Each sample GitHub script will have its own requirements and additional components that may need to be installed for proper functionality.

By using the tools that are presented in these tutorials, you should now be better prepared to create your own automated import tool. If you run into challenges, please visit our migration and integration community forum. You may find other people there who can help with comments and suggestions on your script.
Support Information
How will I know if there is a Canvas outage?

Stay updated on information regarding Canvas by using the Status Page, Twitter, or the Admin Mailing List.

View Canvas Status Page

Visit status.instructure.com for incident reports regarding Canvas. The reports are global announcements that may or may not affect your institution. The Canvas Status Page will only include outages that last longer than 15 minutes.
View Status Icons

<table>
<thead>
<tr>
<th>Component</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canvas</td>
<td>Operational</td>
</tr>
<tr>
<td>Chat</td>
<td>Degraded</td>
</tr>
<tr>
<td>Commons</td>
<td>Partial</td>
</tr>
<tr>
<td>Document previewing</td>
<td>Major</td>
</tr>
<tr>
<td>Media tools</td>
<td>Maintenance</td>
</tr>
<tr>
<td>Support: Phones/Chat</td>
<td></td>
</tr>
<tr>
<td>ePortfolios</td>
<td></td>
</tr>
</tbody>
</table>

On the Status Page, icons are used to describe the current status of Canvas as a whole and specific components within Canvas. These icons will correlate with the following statuses:

- **Operational**: component is working as expected
- **Degraded Performance**: component is experiencing slowness outside of expected range
- **Partial Outage**: component is experiencing extreme slowness with intermittent downtime that typically affects a small subset of users
- **Major Outage**: component is no longer functional or experiencing partial outage that affects a large number of Canvas users
- **Maintenance**: component has been intentionally taken down for major repairs

**Follow Canvas Updates on Twitter**

Follow Canvas LMS (@CanvasLMS) for updates. This account sends out tweets for major, Canvas-wide outages, along with other news and events related to Canvas.
Subscribe to the Admin Mailing List

Contact your Customer Success Manager to subscribe to the Admin Mailing List. If you are subscribed to the mailing list, you will receive emails if your institution is affected by a Canvas outage.
How can I manage support tickets for my institution?

Ticketing System Choice gives you the opportunity to choose from three possible destinations for where the tickets your users create through the Canvas Help Menu will go and will help you streamline your internal support team’s workflow. To learn more about Ticketing System Choice, visit the Canvas Labs in the Community.

You can choose to route your users' tickets:

1. To our ticketing system (Salesforce Service Cloud)
2. To your own instance of Zendesk or Service Cloud using a custom API connector
3. To almost any other ticketing system by email or web post

Send Tickets to Our Ticketing System

Sending tickets to the Canvas Support system (Service Cloud) is the default destination.

If working in the same ticket system as Canvas Support works for you, then you're welcome to use this option. There are a few improvements, including access to reports to analyze your tickets. Log in to Service Cloud.

The Zendesk and Service Cloud Connectors

You can use your own instance of Zendesk or Service Cloud with custom built API-based connectors for Canvas. This option allows use of the metadata from Canvas with every ticket. You can also take advantage of the analytic features.

The Email and Web Post Connectors

You can convert email or web post connectors to tickets to your own ticketing system, even if you are not using Zendesk or Service Cloud.
How do I use the Terms page in an account?

Terms create a default set of start and end dates that apply to any course added to that term. Terms can be added manually or created through SIS imports. Once a user is added to a course, terms set default dates for when users have access to courses assigned to that term. Access relates to user participation in published courses.

Canvas always includes a default term, which cannot be removed or renamed.

View a video about Terms.

Notes:
- Not all courses within a term conform to the term dates, as course or section start dates may override the term dates. Course or section overrides may be before or after the start of the term.
- Only admins can view the Terms page in Canvas. Instructors and students cannot view the Terms page, so please ensure users in your institution are aware of term dates for your institution publicly.

Open Terms

Rubrics
Grading
Question Banks
Sub-Accounts
Terms
Authentication
SIS Import

In Account Navigation, click the Terms link.
View Terms

**Term Details**

- **Fall 2017**
  - SIS ID:
  - Grading Period Set: 2017 Grading Periods
  - 0 Courses

- **Default Term**
  - SIS ID:
  - 68 Courses

The Terms page displays all terms that have been created in your account. Terms can be created manually or via SIS Import.

View Term Details

For each term, you can view all the details created in that term.

You can view the name of the term [1], the term SIS ID (if applicable) [2], the grading period set associated with the term (if applicable) [3], and the number of courses within the term [4].

You can also view the term dates [5] and specific user role access dates [6].
View Custom User Dates

<table>
<thead>
<tr>
<th>Fall 2017</th>
<th>Term Runs from</th>
<th>Aug 31, 2017 12:00am to Dec 30, 2017 12:00am</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students</td>
<td>can access from</td>
<td>term start to term end</td>
</tr>
<tr>
<td>Teachers</td>
<td>can access from</td>
<td>Jun 30, 2017 12:00am to term end</td>
</tr>
<tr>
<td>TAs can access from</td>
<td>Aug 24, 2017 12:00am to term end</td>
<td></td>
</tr>
<tr>
<td>Designers</td>
<td>can access from</td>
<td>whenever to term end</td>
</tr>
</tbody>
</table>

If specific user access dates have been added for the term, you can view the dates within each user role.

**Note:** SIS imports cannot specify specific dates for each user group. Those dates must be changed manually.

Manage Terms

To edit a term, click the **Edit** icon [1]. To delete a term, click the **Delete** icon [2].

**Note:** You cannot delete a term that contains courses.

Add Term
To add a new term, click the Add New Term link.
How do I add a new term in an account?

Term dates should be set before adding any courses to your account. Terms are associated with and used to filter data in account grading periods, account analytics, and account reports.

Canvas always includes a default term, which cannot be removed or renamed. However, you can add new terms with specific start and end dates.

Within each term, you can also set access dates for specific user roles. Retaining the default term settings seem to be preferred by the majority of Canvas institutions, as they allow Teachers, TAs, and Designers to ensure course content will be ready by the course start date. Default settings include the following access for each user role:

- Students inherit the term start and term end date.
- Teachers, TAs, and Designers dates inherit a whenever start date to the term end date. Whenever means that these user roles can always access a course before the term begins.

Notes:

- Terms can also be created using SIS Imports. However, SIS imports cannot specify specific dates for each user group and must be changed manually.
- Terms reside at the main account level and cannot be created for sub-accounts.
- Only admins can view the Terms page in Canvas. Instructors and students cannot view the Terms page, so please ensure users in your institution are aware of term dates for your institution publicly.
Open Terms

Rubrics
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SIS Import

In Account Navigation, click the Terms link.

Add New Term

Term Details
Fall 2017
SIS ID:
Grading Period Set: 2017 Grading Periods
0 Courses

Default Term
SIS ID:
68 Courses

Click the Add New Term link.
Add Term Details

In the Term Name field [1], enter a name for the term. This name will be displayed as part of any course added to the term.

If your institution is using SIS IDs, you can enter an SIS ID for the term in the SIS ID field [2]. In SIS CSV files, the SIS ID is called the course ID.

Add Term Dates

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Canvas Admin Guide Updated 2019-08-05
In the Term Runs from line, use the calendar icons to set a term start date [1] and term end date [2].

By default, the student dates to view courses inherit the Term Runs from [start date] to [end date], and Teachers, TAs, and Designers dates inherit a whenever start date to [term end date].

**Note:** By default, term access is cut off at 12 AM on your indicated end date, meaning the previous day is the last full day that users have access to the term. For instance, setting an end date of December 16 means December 15 is the last full day users can access the course. However, you can set a specific time as part of the term dates.

**Add User Dates**

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**Term Details**

<table>
<thead>
<tr>
<th>Term Name:</th>
<th>Winter 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIS ID:</td>
<td>123456</td>
</tr>
</tbody>
</table>

Term Runs from | January 8, 2018 to April 28, 2018 |

Students can access from | to |
Teachers can access from | to |
TAs can access from | to |
Designers can access from | to |

---

Each term allows you to set specific access dates for each user role.

If you want each user role to inherit the default term access, you do not need to enter any dates. Once you save the term and add it to your account, the user roles will display the following defaults:

- Students inherit the term start and term end date (identified in the Terms page as term start and term end).
- Teachers, TAs, and Designers dates inherit a whenever start date to the term end date (identified in the Terms page as term end). *Whenever* means that there is no start date, and these user roles can always access a course before the term begins.
Modify User Dates

If you want to set start and end dates for a specific user role, locate the role and set dates for that role.

For example, if you want teachers to only be able to access unpublished courses two months before the term start date, and TAs only one week before the term start date, you can set a new start date for each of their respective roles. Date changes to a base role affect all users with the role, including custom roles.

Notes:

- Use caution when editing a whenever date, as the whenever entry is no longer available after it is edited.
- Changing the Teachers, TAs, and Designers start dates affects their ability to access unpublished courses in the term.

Add Term

Click the Add Term button.
Manage Term

Winter 2018
SIS ID: 123456
0 Courses

<table>
<thead>
<tr>
<th>Term Runs from</th>
<th>Jan 8 at 12am to Apr 28 at 12am</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students can access from</td>
<td>term start to term end</td>
</tr>
<tr>
<td>Teachers can access from</td>
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<tr>
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<td>whenever to term end</td>
</tr>
<tr>
<td>Designers can access from</td>
<td>whenever to term end</td>
</tr>
</tbody>
</table>

To edit the term details, click the Edit icon [1]. To delete the term, click the Delete icon [2].

**Note:** Terms cannot be deleted if they contain courses.
What should I do at the beginning and end of each term as an admin?

Every institution is different but administrators should follow these guidelines for a happy term. Be sure to read these steps carefully.

Create Term

Term Details

<table>
<thead>
<tr>
<th>Fall 2017</th>
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<td>Grading Period Set: 2017 Grading Periods</td>
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<td>TAs can access from Aug 24, 2017 12:00am to term end</td>
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<tr>
<td></td>
<td>Designers can access from whenever to term end</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Default Term</th>
<th>Term Runs from whenever to whenever</th>
</tr>
</thead>
<tbody>
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</tr>
</tbody>
</table>

At the beginning of the term, the number one priority is to make sure the term is built. If there is no term, the courses have no home. The Instructor should have access to the course(s) he or she is teaching before and after the term. Once the term is built, then most of the information that goes into the term will be automatically added. This information includes the SIS file with all the student information, sections, enrollments, and cross-listings.

If your institution uses grading periods, you can associate a term with a grading period set.
Add Sections

The next step is to add sections. This usually takes place via SIS files. The SIS Importer tells Canvas how to interpret the XML file that comes from the SIS file. Those XML files may include section and/or course information. To add a section manually, in Course Navigation, click the Settings link.

Course Sections create a course short name by adopting the section name (ie: DS-101 section 001, that will a create a course with the name DS-101-001). Enrollments are automated and flow between the software and Canvas.

Note: Sections are mobile. They are easily created and can move from term to term or course to course. Just be wary that if there are multiple sections (cross-listing), that the instructor knows to not start building the course until the information has been processed through Canvas. For courses with cross-listings (DS-101-001, DS-101-002, DS-101-003), Canvas pulls a random section to be the main one. For example, DS-101-003 is the section that Canvas pulls to be the live course which makes it the section that needs to be built. Otherwise, the hard work of the instructor won't be there in the live course. This is done by live events or manual batch uploads.

End Term

At the end of the term, as long as the term dates were set up correctly, the course should automatically conclude. You can change the course dates if the course needs to extend past the term dates. Make sure the grades published correctly and continue to prepare for the next term.
What should I encourage instructors to do at the beginning and end of each term?

Every institution is different and will have varying items to complete at the beginning and the end of each term. However, there are some best practices that should not be overlooked while encouraging instructors at the beginning and end of each term.

View Course Details

At the beginning of the term, instructors should be encouraged to:

- Know how to use Canvas and do simple, general course building.
- Make sure courses are properly built for their needs. This includes reviewing proper course names, sections, cross-listed sections, etc., before they do any work with their course(s).
- Double check that the start and end dates are correct for the term and course. The course(s) and section(s) need to reflect appropriate term dates.
- Copy content into the course if you are migrating from another system. Otherwise, it is a best practice to build the course from scratch in Canvas.
- Update the syllabus, make sure assignment dates are set properly, and make sure quizzes and/or surveys have been published.
- Make sure the grading scheme has been set.
- Make sure Assignment groups are set up correctly.
- Make sure files or folders that you don't want students to see are locked.
- Check course content to be certain all the information is there.

Notes:

- Building a course within Canvas is usually easier to edit than importing content and fixing everything that goes wrong. A best practice would be to download the files and/or course content you want to move to Canvas and then manually upload everything into Canvas. Sure, it may take longer, but in the end the instructors will have to look over their content and perhaps change some of it to make it better.
- If instructors have courses they no longer want to use, encourage them to conclude or delete the course for the benefit of their students. If your institution allows students to see their future enrollments, any course that is not published will remain in the Future Enrollments section of a student's Courses but will not be accessible to students. Concluding or deleting the course will remove these courses from this section.

View Grades

At the end of the term, instructors should be encouraged to:
• Make sure all assignments have a graded value. For example, a score of 0 or default grades for all ungraded assignments.
• Download .csv gradebook for backup, publish to SIS (feature,) or manually enter into SS.
• Get ready for the next term.

Notes:
• The term dates will specify when the term ends. However, some institutions allow instructors to have access to their course(s) for a year or more after the term has ended to get content or copy content.
• There should be no reason to manually conclude a course at the end of the term if the term dates are set correctly and effectively. If a situation arises where a course must be concluded earlier than the end term date, instructors can change the end course date or conclude the course in Course Settings (if they have permissions to change the course state).