EQUELLA®

Canvas Configuration Guide

Version 6.4

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EQUELLA Canvas by Instructure integration overview

EQUELLA integrates easily with Canvas by Instructure (Canvas) using LTI to create a seamless system for users. Additionally users can login to EQUELLA using their Canvas login.

The purpose of this guide is to provide system administrators with an understanding of the EQUELLA Canvas integration process to enable successful integration.

Please note that this guide has been developed using EQUELLA version 6.4 GA and the latest Canvas and, as such, may differ in appearance to your own installation.

Prerequisites

To successfully complete this installation the system administrator will require:

- Sufficient privileges to access the Canvas system integration functionality.
- Sufficient privileges to access the EQUELLA User Management functionality (further information is provided in the *EQUELLA Security Guide*).

System prerequisites for integration

- EQUELLA version 6.4 and Canvas must be installed and running. Further information on installing EQUELLA is provided in the *EQUELLA Installation and Administration Guide*.
- Ensure the time settings of the servers have the correct time and time zone for their location. This way both will report to Greenwich Mean Time (GMT) and synchronise correctly.
- To access EQUELLA from Canvas at least one course must have been created in Canvas. Refer to the Canvas documentation for more information.

Integration procedure

EQUELLA Canvas integration can be broken into the following steps:

1. Register an LTI OAuth Client in EQUELLA.
2. Add EQUELLA as an external tool in Canvas.
3. Add Canvas as an external tool in EQUELLA.
4. Test the installation.

Register an LTI consumer in EQUELLA

LTI consumer client registrations are registered from the **Settings** page in EQUELLA.

To create a new LTI consumer

1. Select **Settings** from the navigation menu, and either type *LTI* in the filter box, then select **LTI consumers** from the results or scroll down to **LTI consumers** on the Settings list. An example is shown in Figure 1.
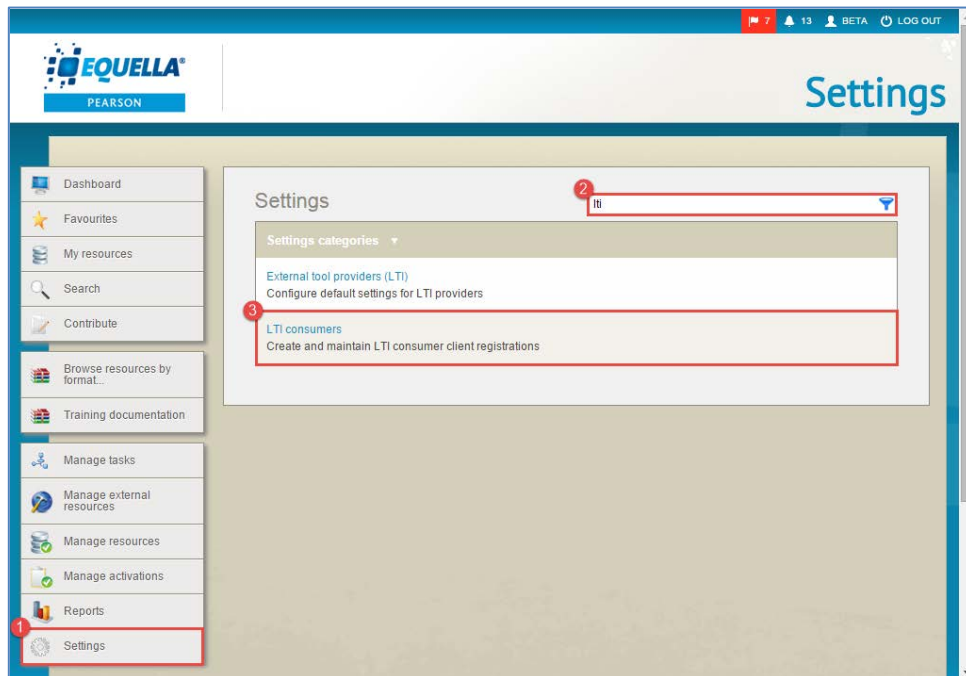

Figure 1 Settings page - LTI consumers

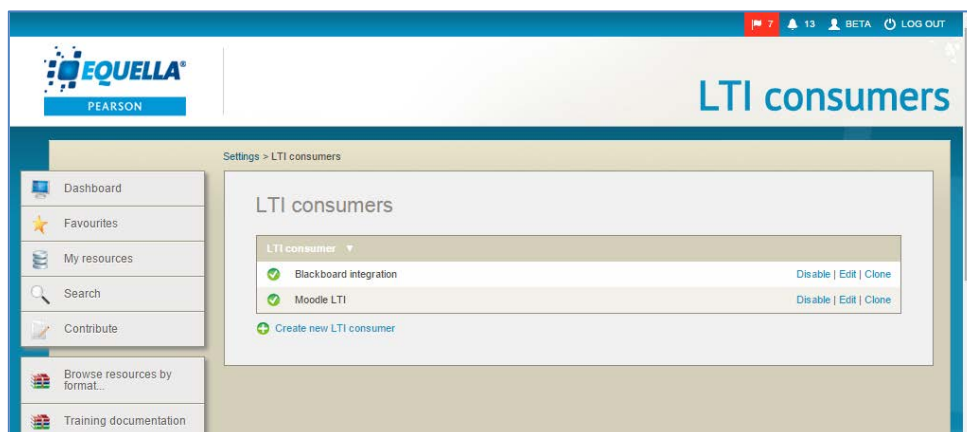The **LTI consumers** page displays. An example is shown in Figure 2.

Figure 2 LTI consumers page

2. Select the **Create new LTI consumer** link to open the **Create new LTI consumer** page. An example is shown in Figure 3.

Figure 3 Create new LTI consumer page

3. Enter a **Title** (e.g. *Canvas*) and a **Description** (optional).

4. A default **Consumer key** displays. This can be changed as desired (e.g. *canvas*). Take note as the **Consumer key** is entered in Canvas during integration configuration.

5. A default **Consumer secret** displays. This can be changed as desired. Take note as the **Client secret** is entered in Canvas during integration configuration.

Other options can be enabled as required. Further information on LTI consumers is provided in the *EQUELLA LTI Consumer Configuration Guide.*

LTI/LIS Role Mappings

Canvas roles sent through to EQUELLA via the LTI integration need to be mapped to equivalent EQUELLA roles so that relevant privileges can be applied. This is done from the

LTI/LIS Role Mappings section of the *Add new LTI consumer* or *Edit LTI consumer pages*.

The **LTI/LIS Role Mappings** section has three areas:

- **Instructor role** – map the 'Teacher' role to EQUELLA role/s.
- **Other roles** –this area is used to map all other roles that might be used in the integration. A list of the standard LTI/LIS roles is supplied. For more information about mapping other LTI/LIS roles and custom roles, see the *EQUELLA LTI Consumer Configuration Guide.*
- **Unknown roles** – use this area to select the EQUELLA roles to default to when an unknown role is sent to EQUELLA. An example is shown in Figure 4.

Figure 4 LTI/LIS Role Mappings

Mapping the Instructor and Unknown roles

In the **Instructor** and **Unknown** roles fields, the **Add roles** link is used to select the EQUELLA roles to be used in the mappings. An example using the Instructor role is used below:

To map to EQUELLA role/s

1. Click the **Add roles** link under the **Instructor role** field. An example is shown in Figure 5.

Figure 5 Add roles link

The **Select role(s)** dialog displays. An example is shown in Figure 6.
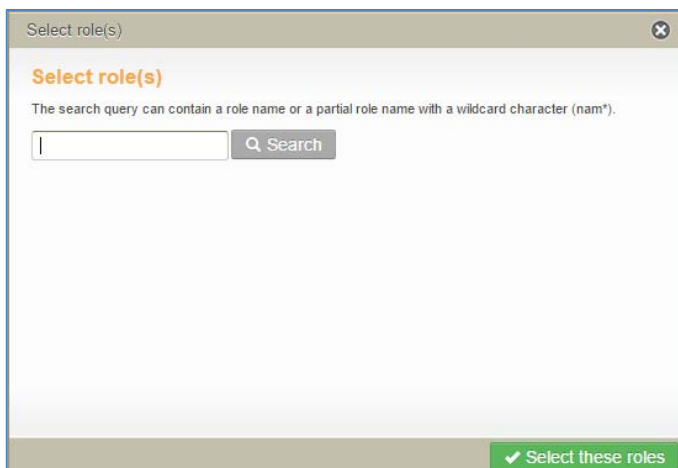
Figure 6 Select role(s) dialog

2. Enter a search query then click [Q Search]. Matching results display. An example is shown in Figure 7.

Figure 7 Select role(s) dialog – results

3. Select the required role/s, then click [✔ Select these roles]. The mapping/s displays in the Instructor role field. An example is shown in Figure 8.
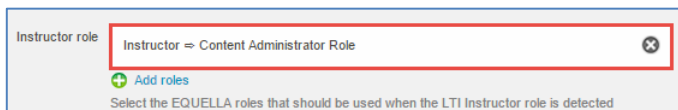

Figure 8 Instructor role field with one mapping

Select the **Add roles** link to add more mappings.

Mapping other roles

The **Other roles** section is used to map LTI/LIS standard roles and other custom roles to EQUELLA roles.

To map other roles

1. In the **Other roles** area, start typing the required LTI/LIS role (e.g. *Student)* in the **Enter LTI/LIS role** field. A list of all the standard LTI/LIS roles displays in a drop-down list. An example is shown in Figure 9.
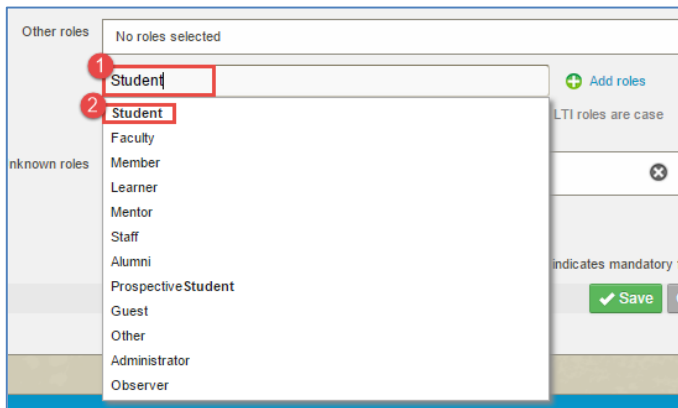

Figure 9 List of standard LTI/LIS roles

2. Select the required value (e.g. *Student*) from the drop-down list.

3. Click the **Add roles** link next to the selected LTI/LIS role. An example is shown in Figure 10.
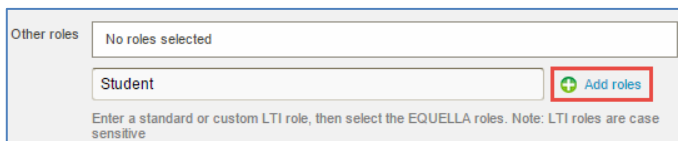

Figure 10 Add roles link

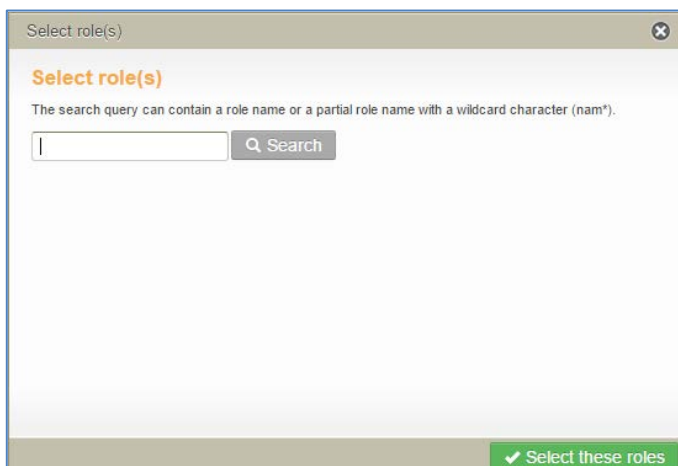The **Select role(s)** dialog displays. An example is shown in Figure 11.

Figure 11 Select role(s) dialog

4. Enter a search query then click [Q Search]. Matching results display. An example is shown in Figure 12.
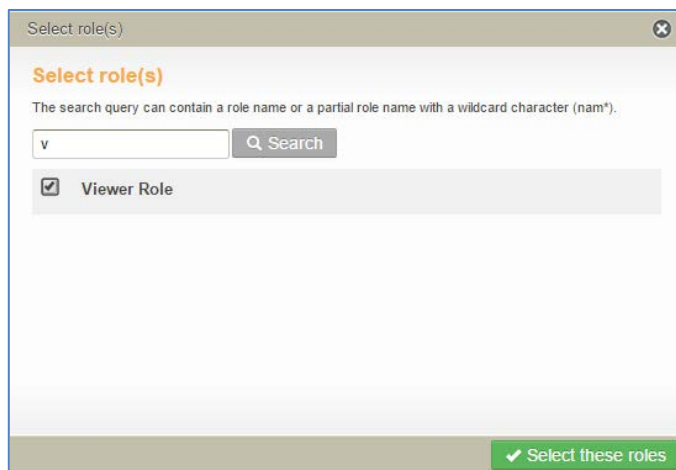
Figure 12 Select role(s) dialog – results

5. Select the required role/s, then click ✔ Select these roles . The mapping/s displays in the
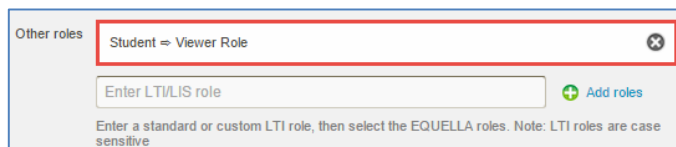   **Other roles** field. An example is shown in Figure 13.

Figure 13 Other roles field with one mapping

To add further EQUELLA roles to the Other roles that have existing mappings or to add
another LTI/LIS role mapping, repeat steps 1 to 5.

An example with multiple EQUELLA roles mapped to LTI role '*Student*' is shown in Figure
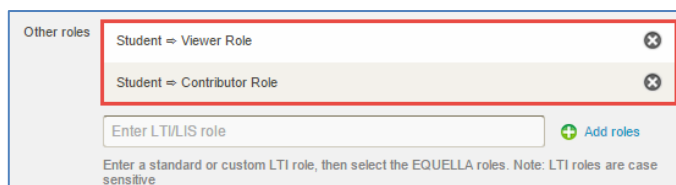14.

Figure 14 Other roles section with multiple EQUELLA mappings for 'Student' role

Configure Canvas

This section describes the required configuration in Canvas to support the integration.

Add External App

EQUELLA is added to Canvas as an External App. This can be done at an administration
account level, which will result in all Canvas courses having access to the EQUELLA
integration screen, or at a course level, which results in only those Canvas courses that
have been configured having access to the EQUELLA integration screen.

To add EQUELLA as an external tool

1. Go to the Courses drop-down and select either:
   a. the administration account (e.g. *EQUELLA*) from the **Managed Accounts** section (to configure the integration across all courses), or
   b. a specific course from the **My** Courses section to open the Canvas course page for that course (to configure the integration for only the selected course).
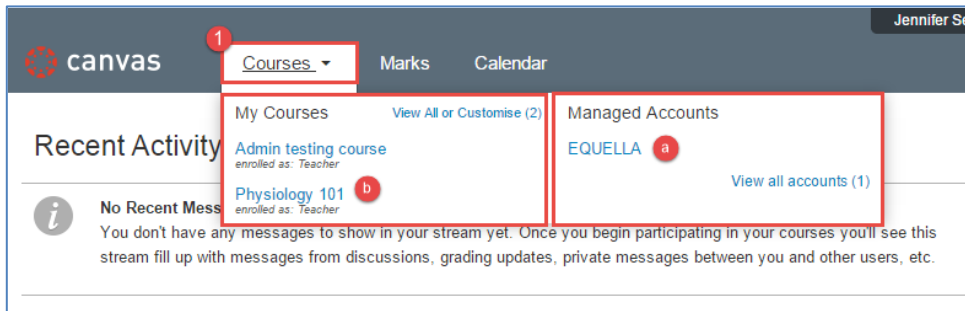
An example is shown in Figure 15.

Figure 15 Courses drop-down

2. Select **Settings** from the account or course page navigation menu, then the **Apps** tab. An example is shown in Figure 16.
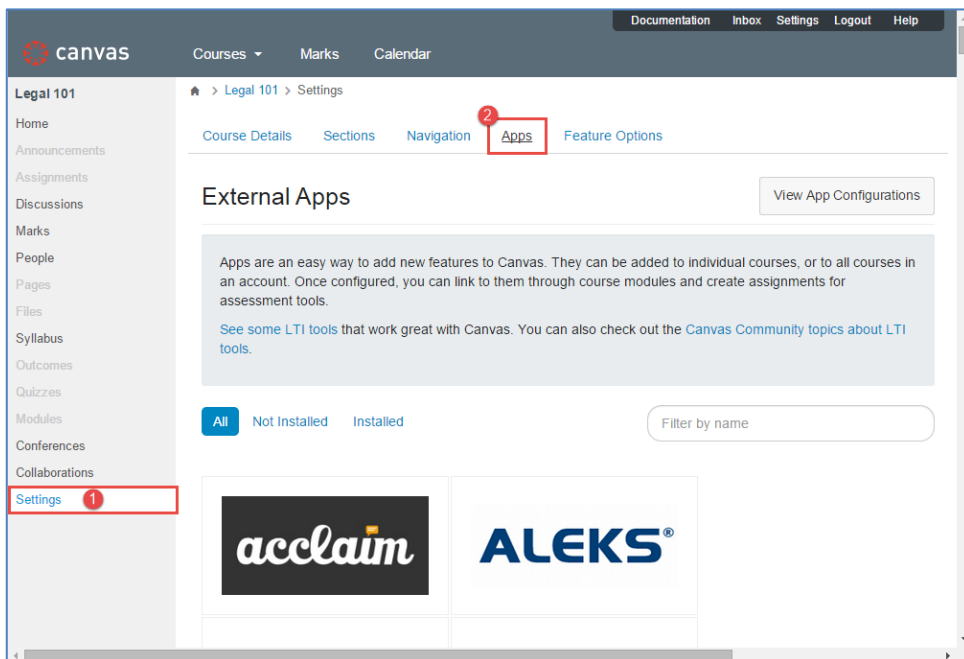
Figure 16 Course Settings page

3. Select   View App Configurations . The **External Apps** list displays.

4. Select   Add New App   to open the **Add New App** dialog. An example is shown in Figure 17.
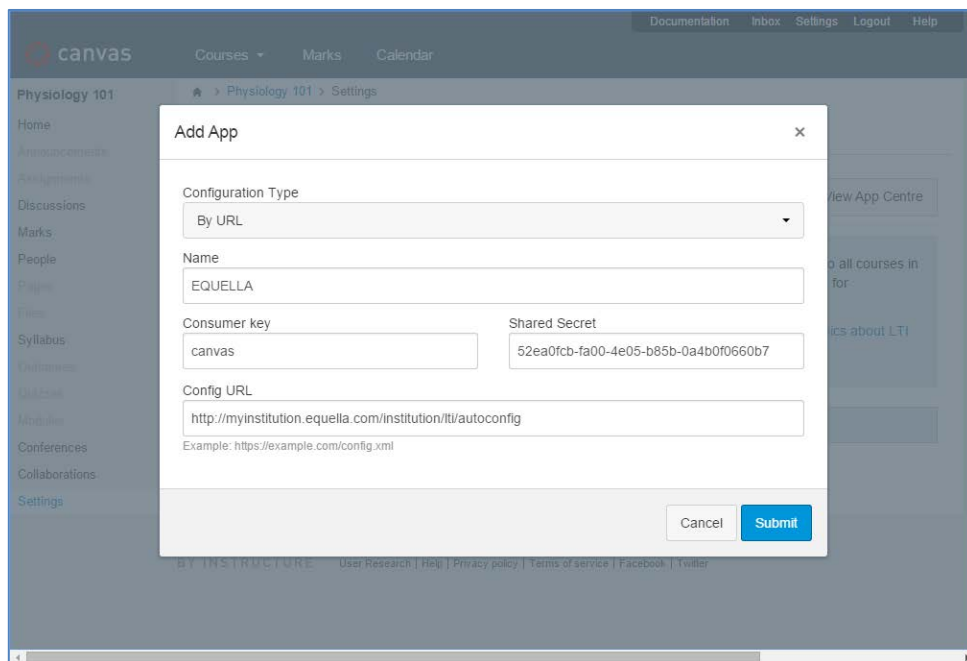
Figure 17 Add New App dialog – By URL

5. Select the **Configuration Type** from the drop-down list.

- For web-accessible EQUELLA instances:

a. Select **By URL.**

b. Enter the **Config URL** at the bottom of the **Add App** dialog box in the format *http://myinstitution.equella.com/institution/lti/autoconfig.* An example is shown in Figure 17.

- For EQUELLA instances not freely available:

a. Select Paste XML.

b. Open a new browser window and enter the **Configuration URL** in the format *http://myinstitution.equella.com/institution/lti/autoconfig* and press **Enter***.* XML displays on the page.

c. Right click and select **View page source** from the menu. Copy all of the resulting XML displayed and paste it into the **XML Configuration** text box at the bottom of **Add App** dialog box. An example is shown in Figure 18.

Figure 18 Add New App - Paste XML option

6. Enter a **Name** (e.g. *EQUELLA*).

7. Enter the **Consumer key** (e.g. *canvas*). This must be the same as previously configured in the Register an LTI OAuth Client section on page 4.

8. Enter the **Shared Secret** (e.g. *52ea0fcb-fa00-4e05-b85b-0a4b0f0660b7).* This must be the same as previously configured in the Register an LTI OAuth Client section on page 4.

9. Click Submit . The **External App** now displays in the list. An example is shown in Figure 19.

Figure 19 External Apps page with new External App

Generate token

A token must be generated against a Canvas user to be used when the Canvas External connector is created in EQUELLA (see Add External Connector in EQUELLA on page 17).

EQUELLA content links are added to Canvas course modules acting as the user that the token is generated under when the following methods are used:

- ▪ *Select resources from EQUELLA* link in Canvas (see Accessing the Integration screen on page 20).
- ▪ **Add to external connector (Push to LMS)** function in EQUELLA (see Accessing the Add to External system (Push to LMS) function on page 21).

When EQUELLA content links are added using the **External Tool** option from the Canvas course module, or added via the **Canvas HTML editors**, the user stored is the logged-in user who performed the function/s.

To generate a token

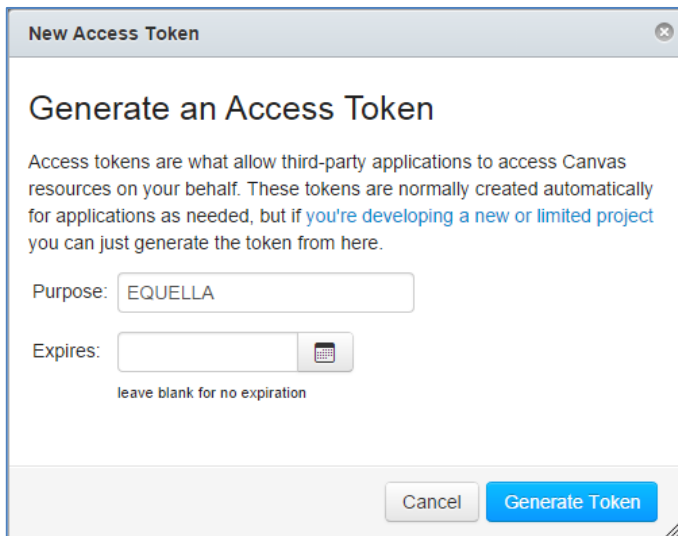1. Log in to Canvas as the user that will be used for EQUELLA integration transactions.

NOTE: The user must have sufficient Canvas permissions to add and view content within the course.

2. Click on the User name link in the top right to display the user **Settings** page, select the **Settings** link from the left hand menu then scroll down and select ⊕ New Access Token . An example is shown in Figure 20.

Figure 20 Canvas User Settings page

The **New Access Token** dialog displays. An example is shown in Figure 21.

Figure 21 New Access Token dialog

3. Enter a **Purpose** (e.g. *EQUELLA*) and leave the **Expires** field blank.

4. Click [Generate Token]. The **Access Token Details** dialog displays. An example is shown in Figure 22.

Figure 22 Access Token Details dialog

5. Copy the **Token** and save it somewhere where it can be easily copied. It will be required for the EQUELLA Canvas External connector configuration.

Configure EQUELLA External connector

Add External Connector in EQUELLA

To add an External connector in EQUELLA

1. Select **Settings** from the navigation menu, and either type *External* in the filter box, then select **External system connectors** from the results or scroll down to **External system connectors** on the Settings list. An example is shown in Figure 23.

Figure 23 Settings - External system connectors

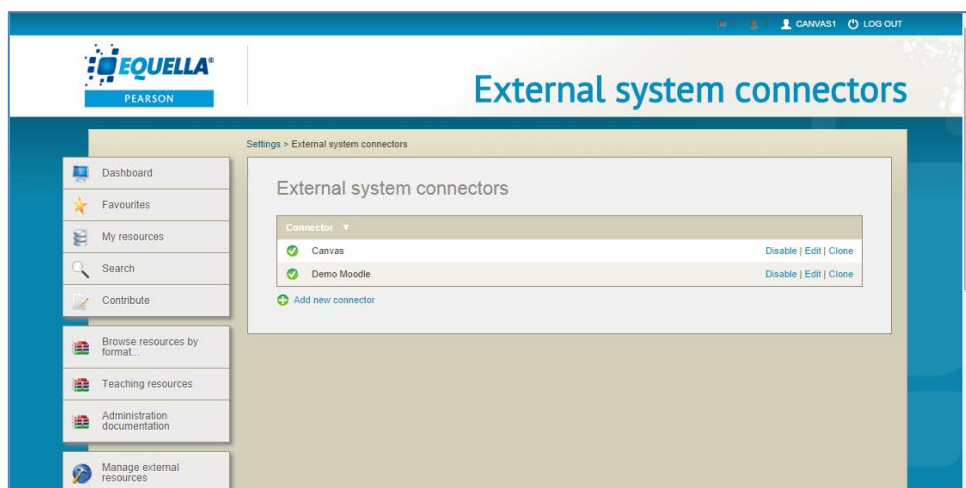The **External system connectors** page displays. An example is shown in Figure 24.

Figure 24 External system connectors page

2. Select the **Add new connector** link to display the **Create new connector** page.
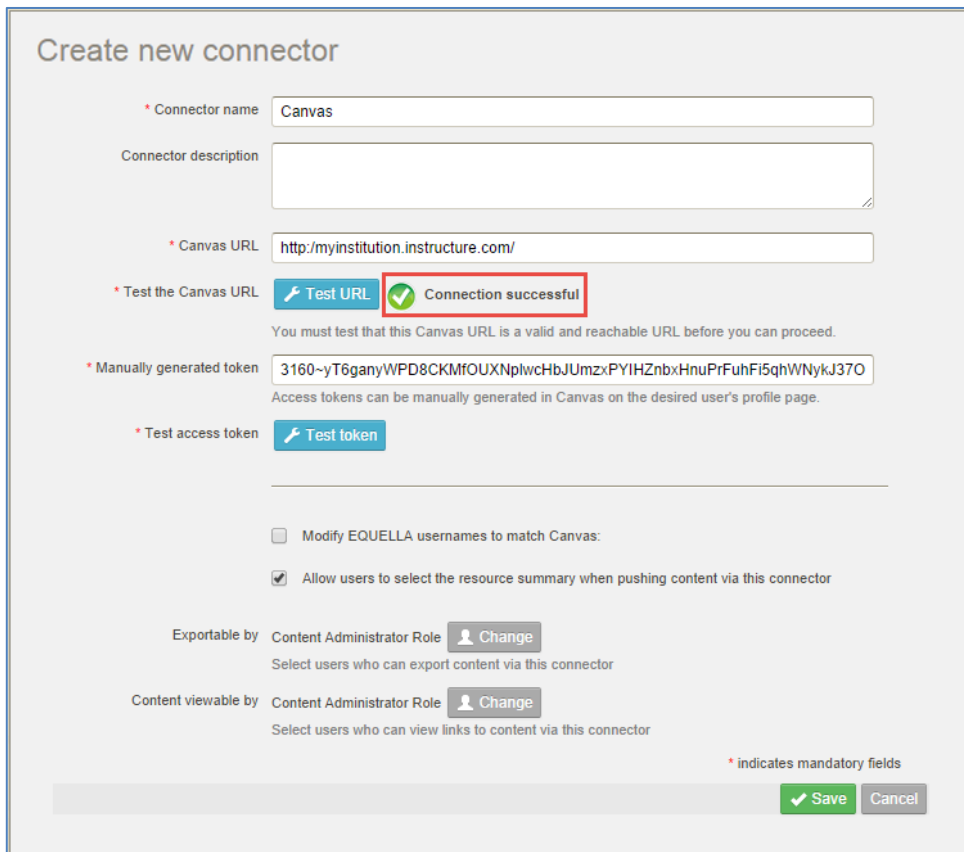
3. From the **Select a connector type** drop-down, select **Canvas.** The **Create new connector page** displays with Canvas-specific options. An example is shown in Figure 25.

Figure 25 Create new connector – Canvas

4. Enter a **Connector name** (e.g. *Canvas*) and **Description** (optional).

5. Enter the institution's **Canvas URL** (e.g. *http://myinstitution.instructure.com*).

6. Click ⚡ Test URL to make sure the entered URL is valid. A **Connection successful** message displays. An example is shown in Figure 26.

Figure 26 Create new connector - Connection successful

If an error occurs, check the URL and try again.

7. Enter or paste the **Manually generated token** generated in Canvas. See <u>Generate token</u> on page 14).

8. Click [🔧 Test token] to make sure the entered token is valid. An **Access token OK** message displays. An example is shown in Figure 27.

**Figure 27 Create new connector - Access token OK**

If an error occurs, check the token and try again.

9. Disregard the **Modify EQUELLA usernames to match Canvas:** checkbox – it was erroneously included and will be removed in a future release.

10. Select the **Allow users to select the resource summary when pushing content via this connector** checkbox if EQUELLA Resource summary page links are allowed to be added to course modules via the Push to LMS function. Leave unchecked if items allowed should be restricted to Resource attachment links.

11. If required, click ![Change] next to **Exportable by** to open the **Select users** page. Select the user, group or role (usually role) to access the **Add to external link** (Push to LMS) from the Resource summary page. Click ![OK] to save.

12. Disregard the **Content viewable by** field. This refers to the *Find uses* function which is not compatible with Canvas at this point.

13. Click ![Save] to save the connector details.

Test the installation

Once the configuration aspects of the integration have been completed, the installation can be tested.

Accessing the Integration screen

1. From a Canvas course navigation menu, select **Select resources from EQUELLA.** The EQUELLA Integration screen displays. An example is shown in Figure 28.
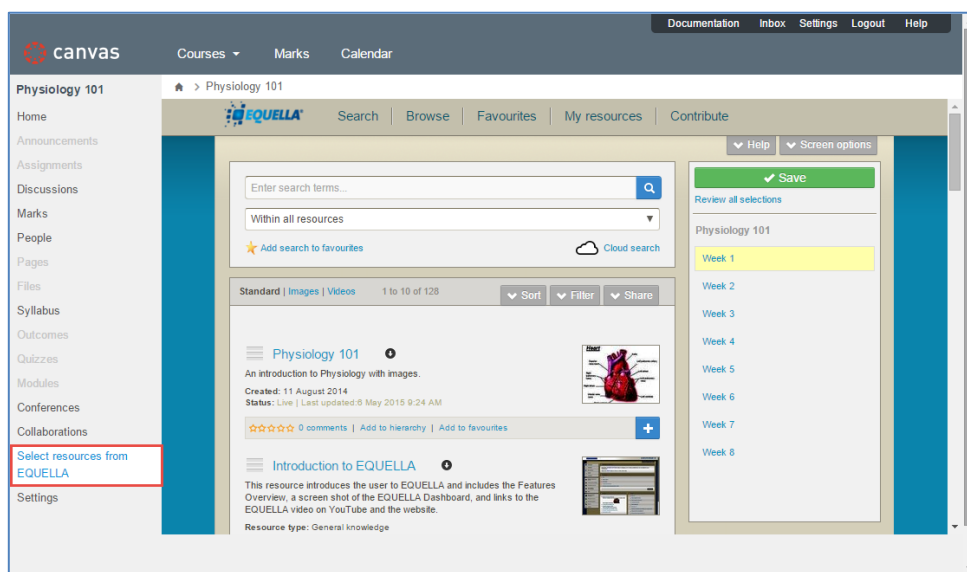
Figure 28 Select resources from EQUELLA - Integration screen

Note that when EQUELLA content links are added and saved into the Canvas course module/s from the Integration screen, the 'token user' is stored against that transaction in Canvas (see Generate token on page 14). However, if content is contributed from the Integration screen, the EQUELLA owner for that resource will be the logged-in Canvas user.

NOTE: If there is no matching EQUELLA user for the Canvas user accessing EQUELLA through the Integration screen, a new EQUELLA user is automatically created using the Canvas credentials.

For further information about the Integration screen, see the *EQUELLA 6.4 Canvas User Guide*.

Accessing the Add to External system (Push to LMS) function

1. From the EQUELLA Resource summary page, select the **Add to external system** link from the **Actions** menu.
2. Select Canvas from the drop down list. If only one external system is set up, the **Add to external system** screen displays immediately. An example is shown in Figure 29.
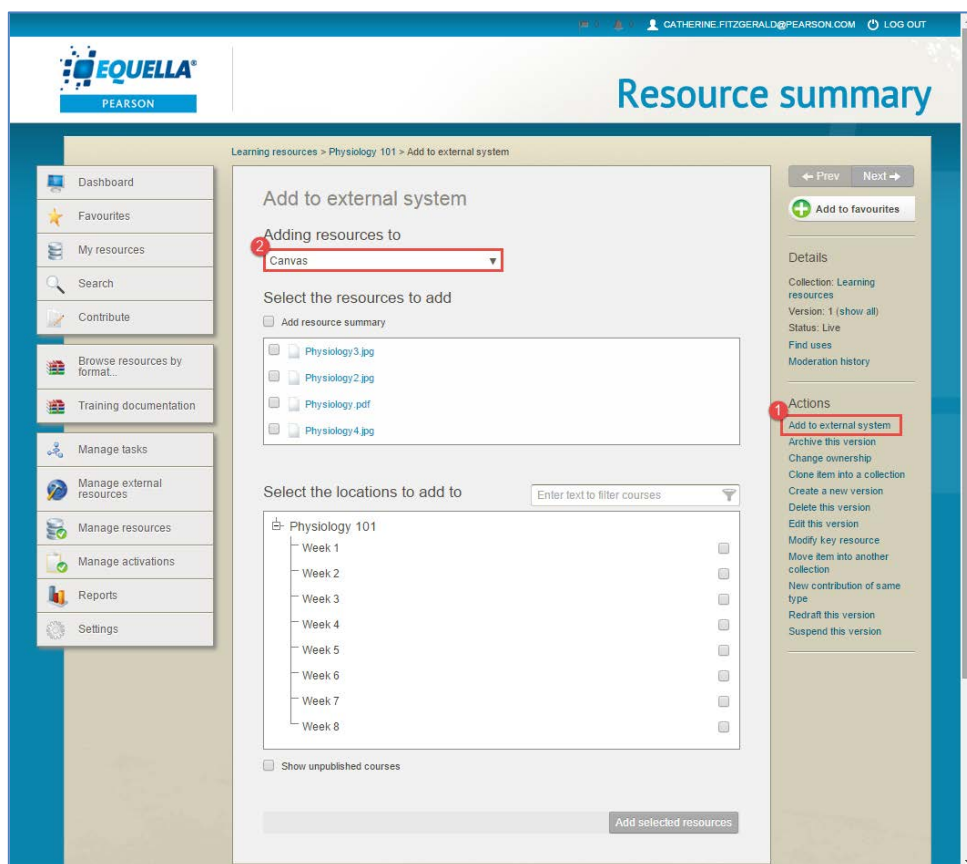
Figure 29 Add to external system

Note that when EQUELLA content links are pushed to the Canvas course module/s, the 'token user' is stored against that transaction in Canvas (see Generate token on page 14).

For further information on the **Add to external system** (Push to LMS) function, see the *EQUELLA 6.4 Canvas User Guide.*

Accessing EQUELLA from the Canvas Module page

1. Select **Modules** from the course navigation menu. A list of course modules display on the screen.

2. Click the ☐+☐ button beside the module the resource is to be added to. An example is shown in Figure 30.
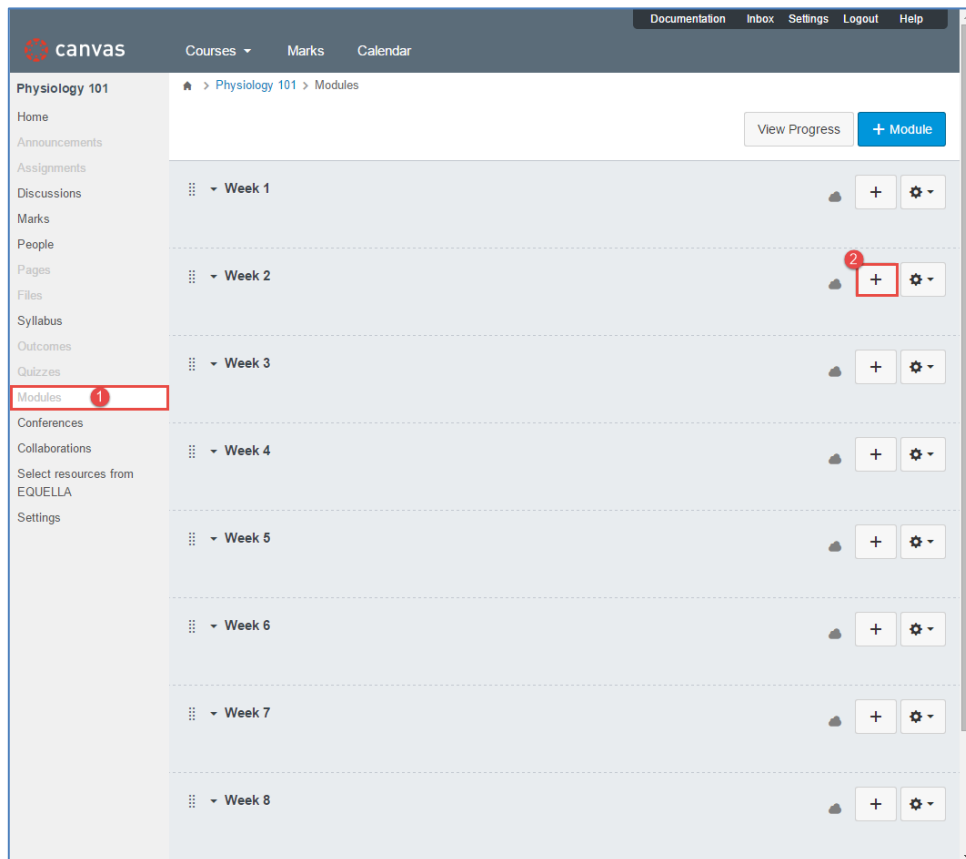
Figure 30 Canvas course Modules page

The **Add item to *Module name*** dialog opens.

3. Select **External Tool** from the **Add** drop-down list. An example is shown in Figure 31.
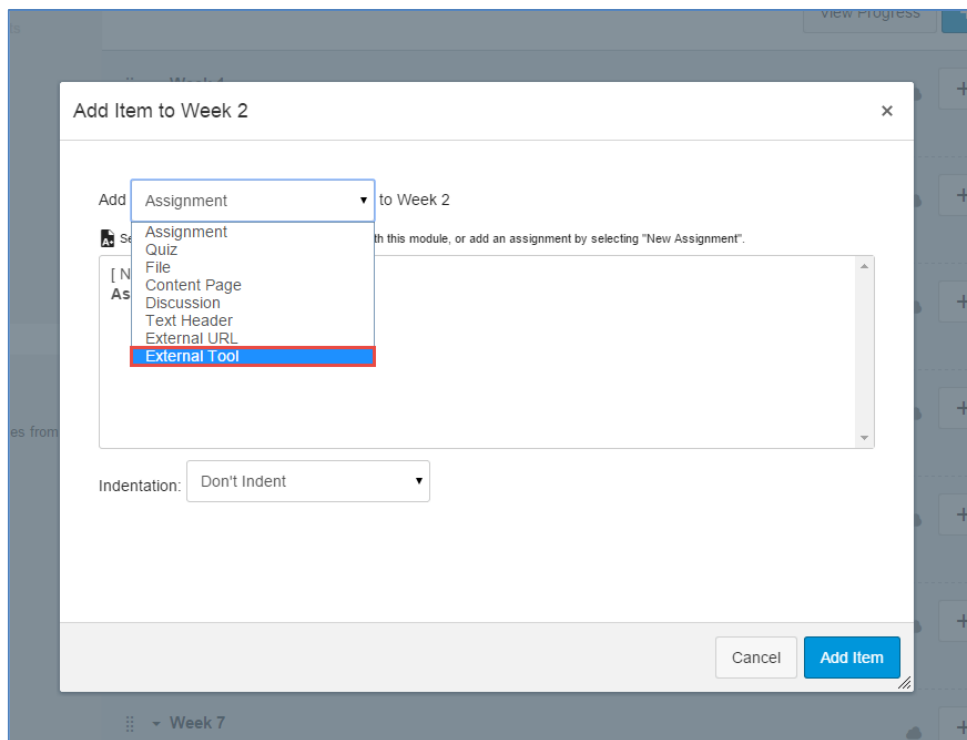
Figure 31 'Add Item to *Module name*' dialog – External Tool

A list of available external tools displays. An example is shown in Figure 32.
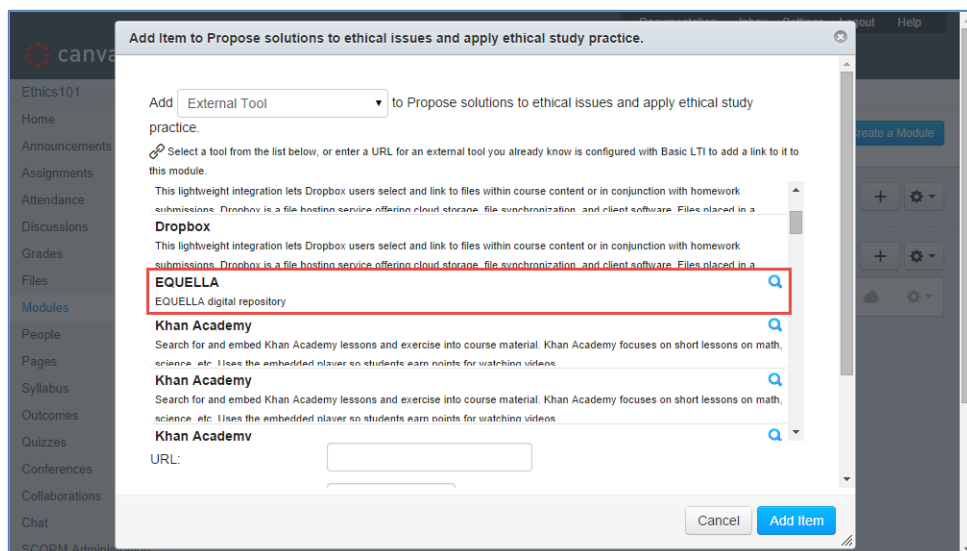
Figure 32 External tools list

4. Locate and select **EQUELLA** from the list. The EQUELLA Select page displays. An example is shown in Figure 33.
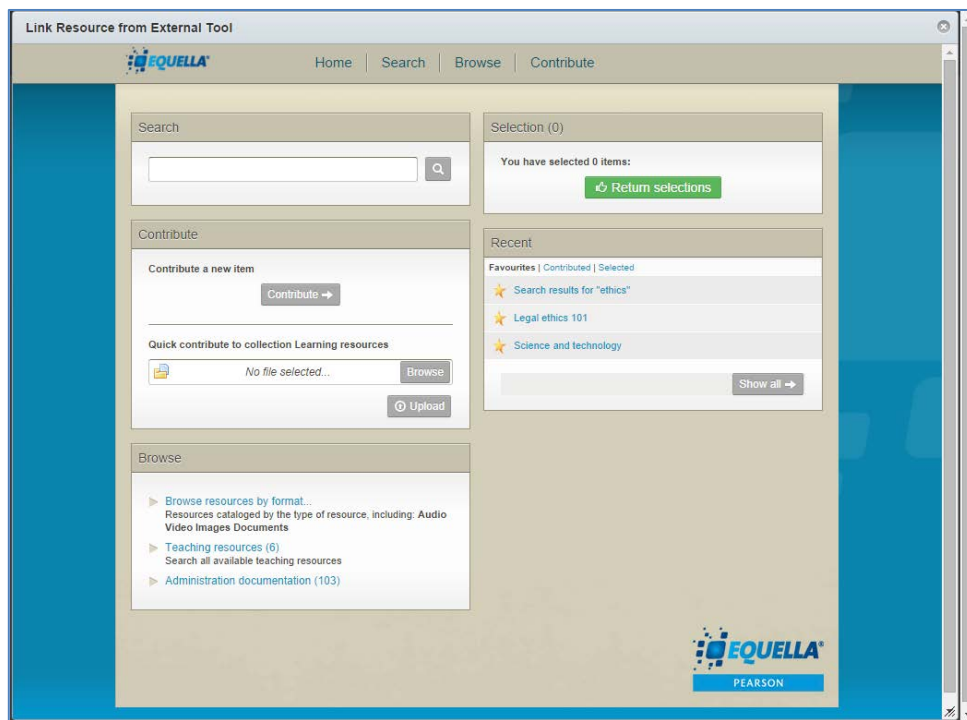
Figure 33 EQUELLA Select screen – Home page

Note that when EQUELLA content links are saved to the Canvas course module/s using this method, the logged-in Canvas user is stored against that transaction in Canvas.

For further information on using the EQUELLA Select page, see the *EQUELLA 6.4 Canvas User Guide.*

Accessing EQUELLA from the Canvas HTML Editors

Any HTML Editor in Canvas should be able to access EQUELLA content. The example below uses the Canvas **Assignments** function to illustrate how to test the availability of the EQUELLA option.

1. On the Canvas Course page, select **Assignments** from the navigation menu, then click **+ Assignment**. An example is shown in Figure 34.
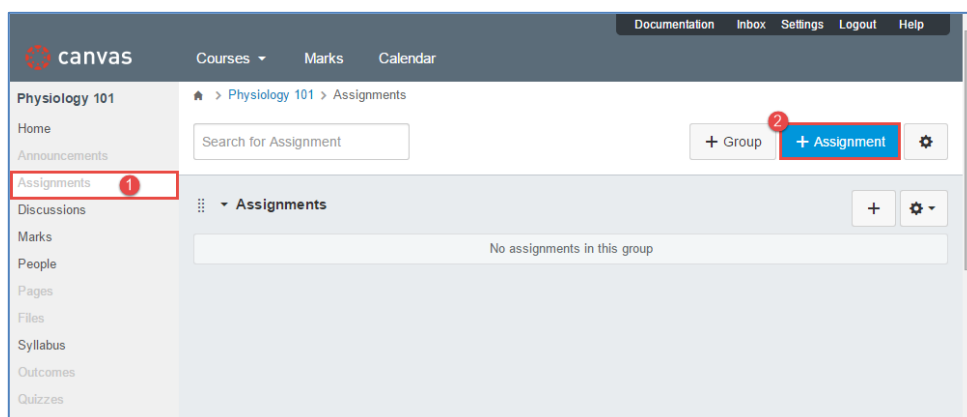
Figure 34 Canvas course page - Assignment

The **Create new assignment** page displays with the HTML Editor An example is shown in Figure 35.
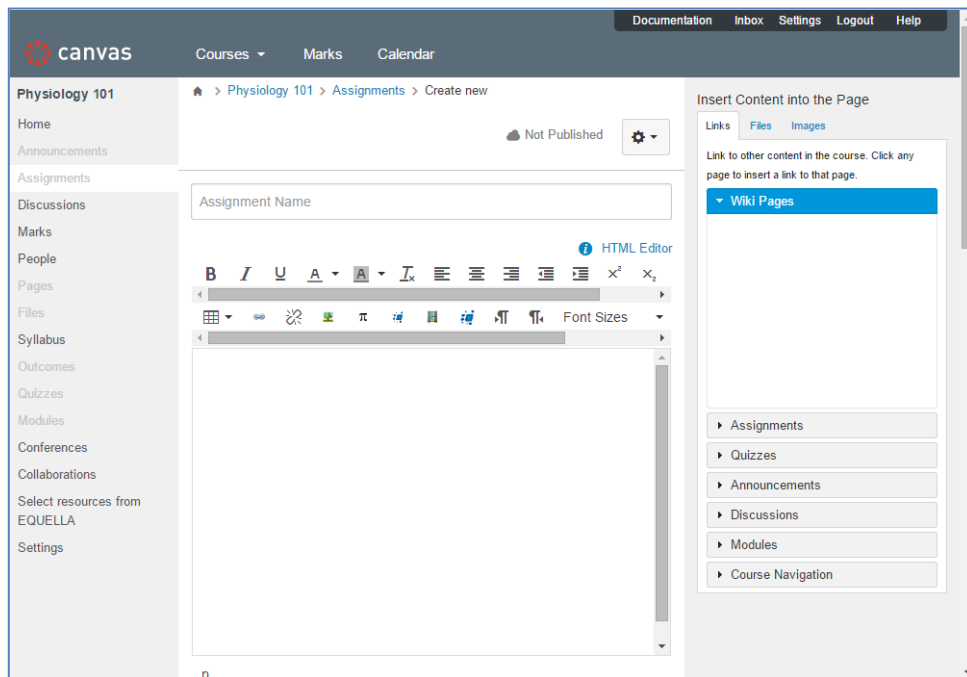
Figure 35 Create new assignment page

2. Select the ⟨icon⟩ icon (EQUELLA) from the HTML editor toolbar. An example is shown in Figure 36.
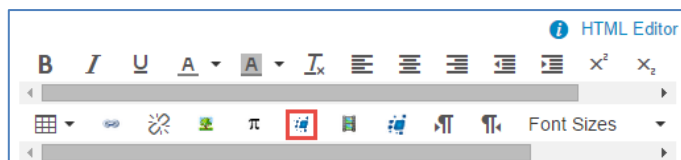
Figure 36 Canvas course page—Editing settings

NOTE: The second, larger ⟨icon⟩ icon (Insert EQUELLA links) has been added by Canvas, and does not link to the integrated EQUELLA instance. It opens the OER repository. The same OER content can be accessed via Cloud search results from the integrated EQUELLA.

The **EQUELLA Select** screen displays. An example is shown in Figure 37.
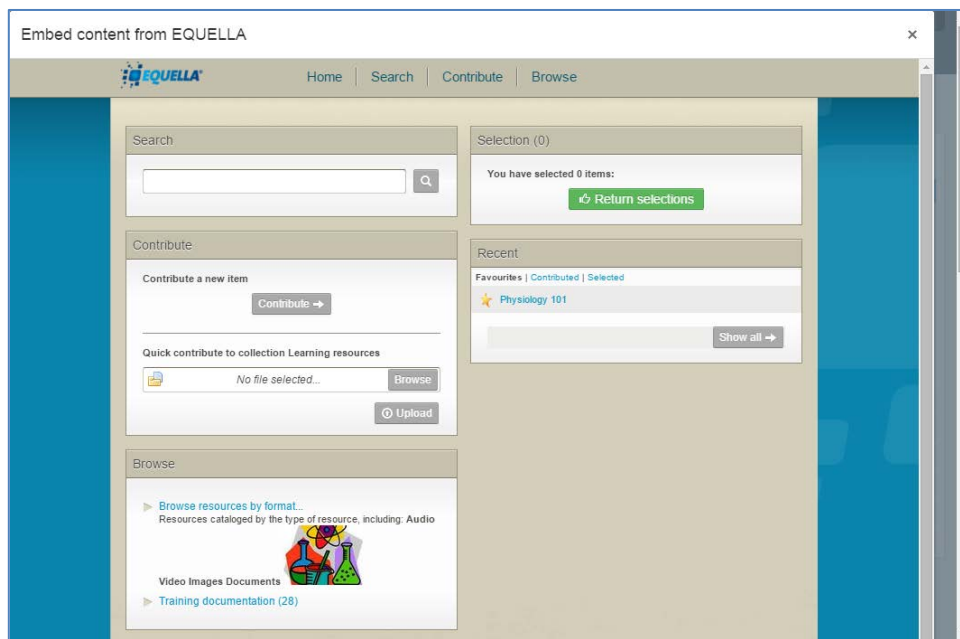
Figure 37 EQUELLA Select screen

For further information see the *EQUELLA 6.4 Canvas User Guide.*

EQUELLA Selection session options

A number of options are available to tailor the EQUELLA Integration and Select screens.

The Selection sessions page provides the Quick Contribute setting, as well as version defaults for resource version selection.

To configure Selection sessions

1. Select the **Selection sessions** link from the Settings page. The **Selection sessions** page displays, as shown in Figure 38.
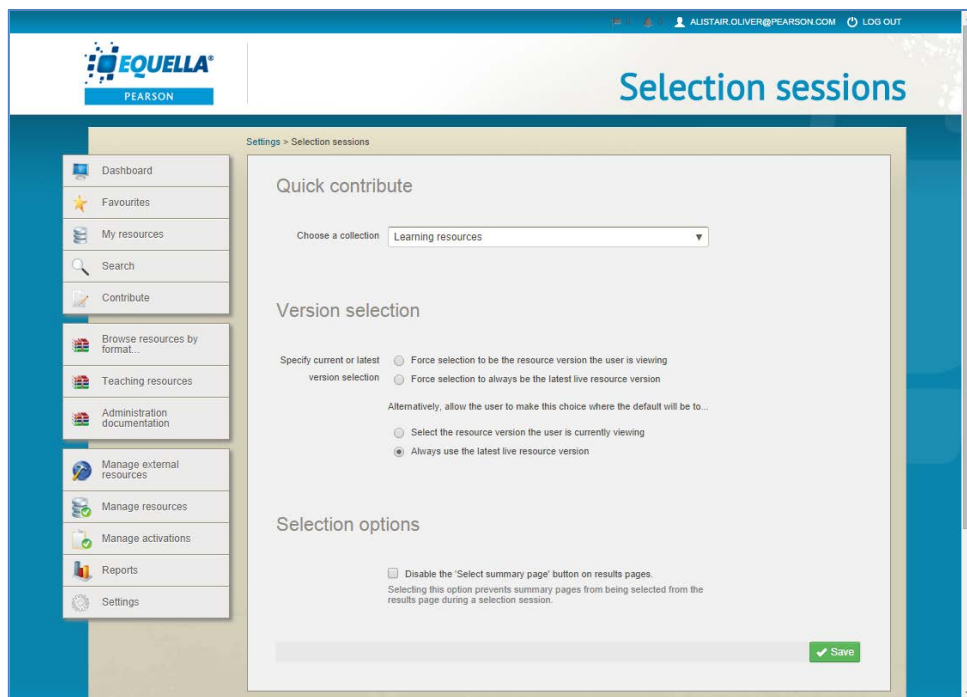
Figure 38 Selection settings page

Quick Contribute

In integrated third-party systems such as Blackboard, Canvas and Moodle, the Integration screen **Contribute** page enables a **Quick Contribute** control. An example is shown in Figure 39.

Figure 39 EQUELLA Integration screen — Contribute page - Quick Contribute feature

Users can navigate to and select a file that is automatically contributed as an EQUELLA resource into the chosen EQUELLA collection and added to the integration's course list.

The Quick Contribute control prevents duplicate files being uploaded into EQUELLA.

To select a collection for Quick Contribute

1. Select a collection from the **Choose a collection** drop-down list.
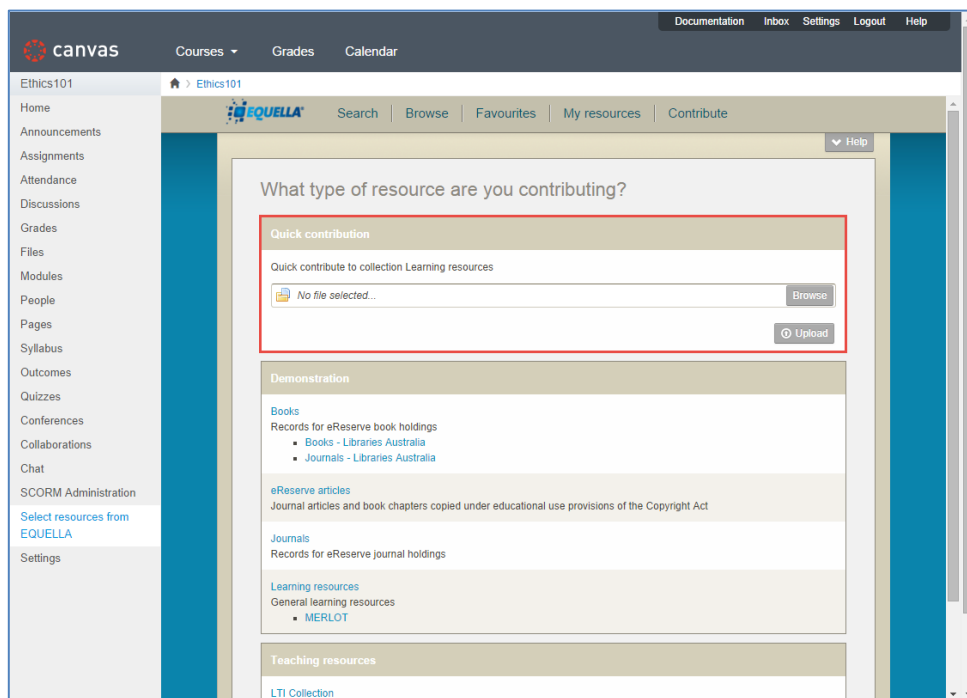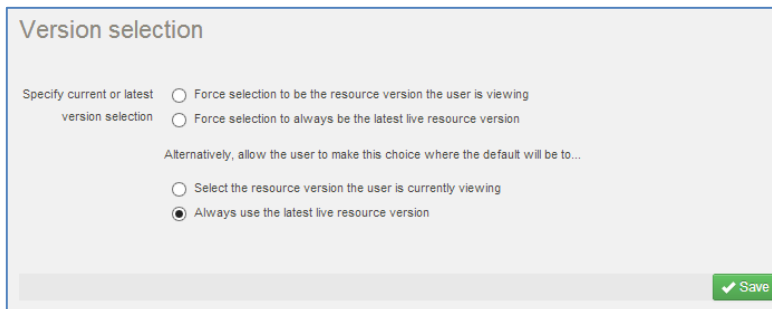2. Click ✔ Save .

Version selection

The **Version selection** section of the Selection sessions page provides institution-wide settings for resource version selection. Course specific version selections can be managed using the Administration Console Courses tool.

Version selection configuration is used to determine which version of a resource is displayed when a resource link is selected. Figure 40 shows the **Version selection** section.

Figure 40 Version Selection section

Selecting the *latest live version* options displays the latest version of the resource when the link is selected even if the saved link is for an older version; otherwise the version associated with the link is displayed.

The options that allow a user to choose the version are enabled on the resource's summary page for a Resource Selector control in a Contribution Wizard and when EQUELLA is integrated with a third party application such as Blackboard, Canvas or Moodle. An example is shown in Figure 41.

To configure version selection

1. Select one of the following:
   - **Force selection to be the resource version the user is viewing**—(default option) displays the originally linked resource.
   - **Force selection to always be the latest live resource version**—displays the latest version of the originally linked resource.
   - **Select the resource version the user is currently viewing**—allows the user to choose between the selected resource version and the latest version of that resource during contribution when selecting existing EQUELLA resources as attachments. When this option is selected, a drop-down list displays on the My

selections page and the user selects the required option. *Fixed to v(x)* is shown as the default when this option is selected. An example is shown in Figure 41.

- **Always use the latest live resource version**—allows the user to choose between the originally linked resource and the latest version of that resource during contribution when selecting existing EQUELLA resources as attachments. When this option is selected, a drop-down list displays on the My selections page and the user selects the required option. *Latest available* is shown as the default when this option is selected. An example is shown in Figure 41.
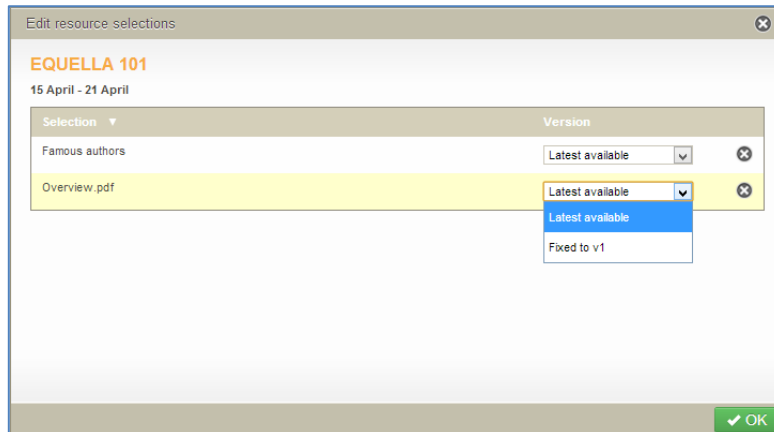

Figure 41 EQUELLA Resources My selections version drop-down

Selection options

Administration users can choose to disable the **Select summary page** button on the results page for selection sessions, which can prevent accidental additions of EQUELLA summary page links to course modules.

To disable the Select summary page button

1. From the **Selection options** section of the Selection sessions page, select the **Disable the 'Select summary page' button on results pages** checkbox. An example is shown in
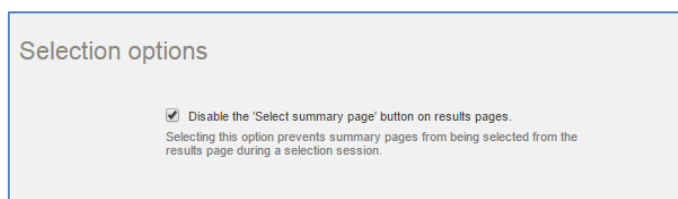

Figure 42 Selection session page - Disable 'Select summary page' button

An example showing the Integration screen search page with the button enabled is shown in Figure 43 and with the button disabled in Figure 44.
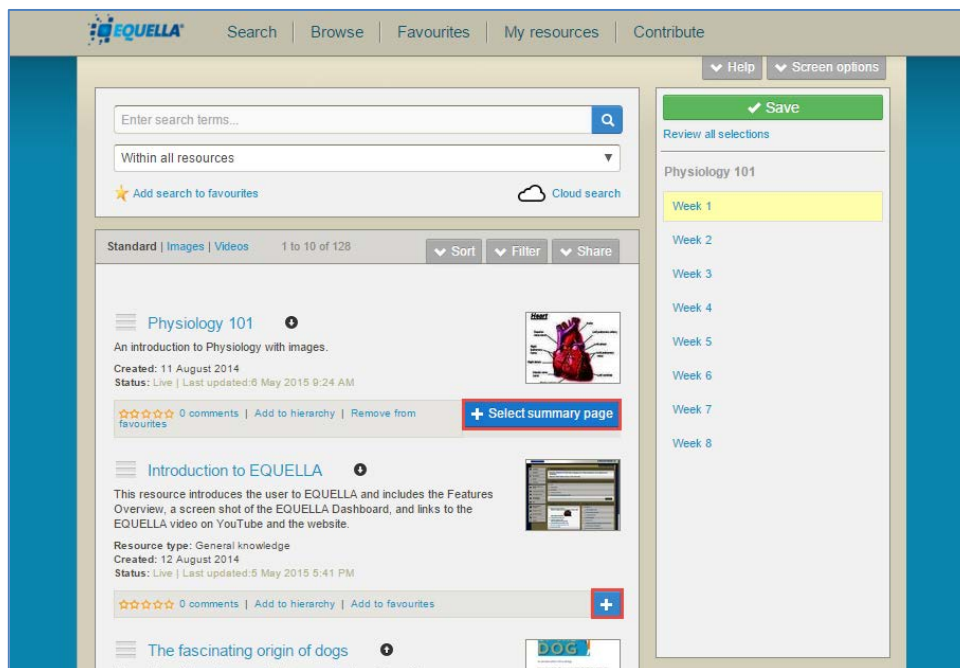
Figure 43 Integration screen with Select summary page button enabled
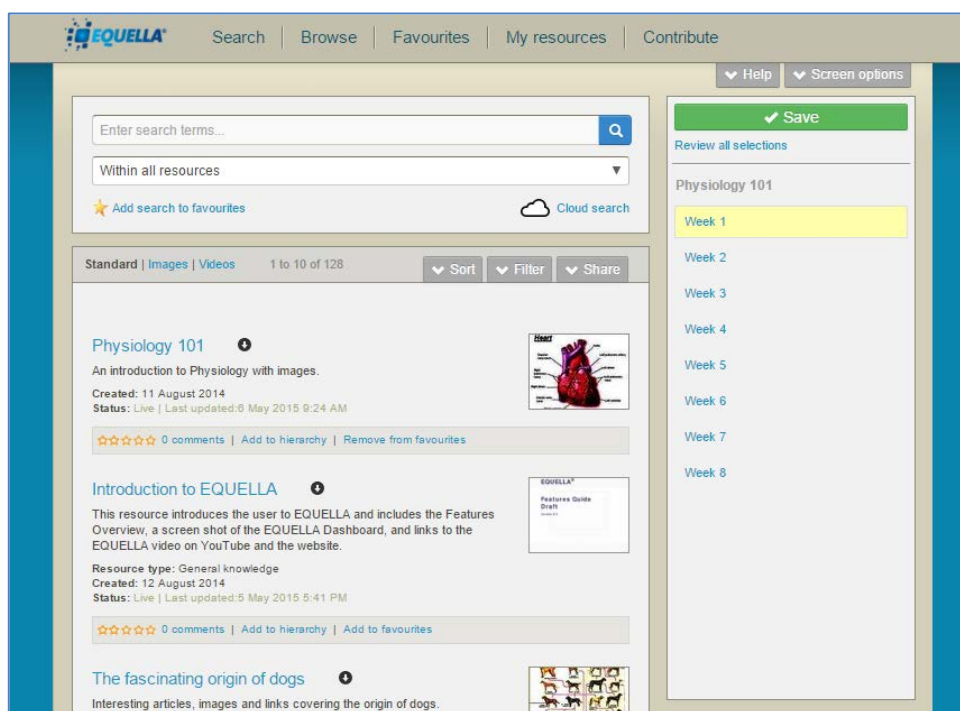

Figure 44 Integration screen with Select summary page button disabled

EQUELLA Canvas user login plug-in

EQUELLA can be configured so that users can login to EQUELLA using their Canvas login credentials. An example of the EQUELLA login page with the Canvas plug-in enabled is shown in Figure 45.
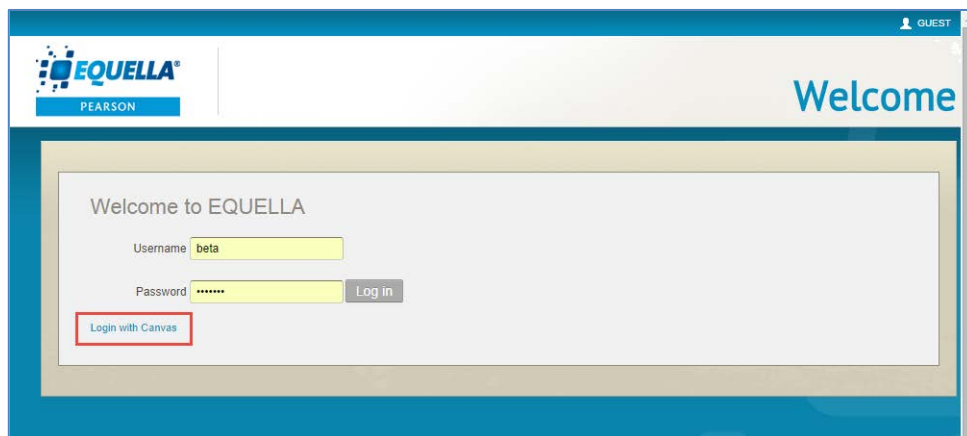
Figure 45 EQUELLA login page with 'Login with Canvas' option

Clicking the **Login with Canvas** link takes the user to the Canvas login page (or straight in to EQUELLA if they have previously logged in to Canvas). Once the user logs in to Canvas, they are taken to the EQUELLA Dashboard page.

NOTE: Matching user records must exist in both Canvas and EQUELLA. An error displays if a Canvas user tries to access EQUELLA where there is no matching user record in EQUELLA.

To use Canvas login for EQUELLA

*NOTE: A Canvas Dev Key is required to successfully configure this functionality. Go to http://instructure.github.io/ and follow the instructions in the **Dev Key Signup** section to apply for one.*

1. From the EQUELLA navigation menu, go the **Settings**, **Administration Console**. An example is shown in Figure 46.
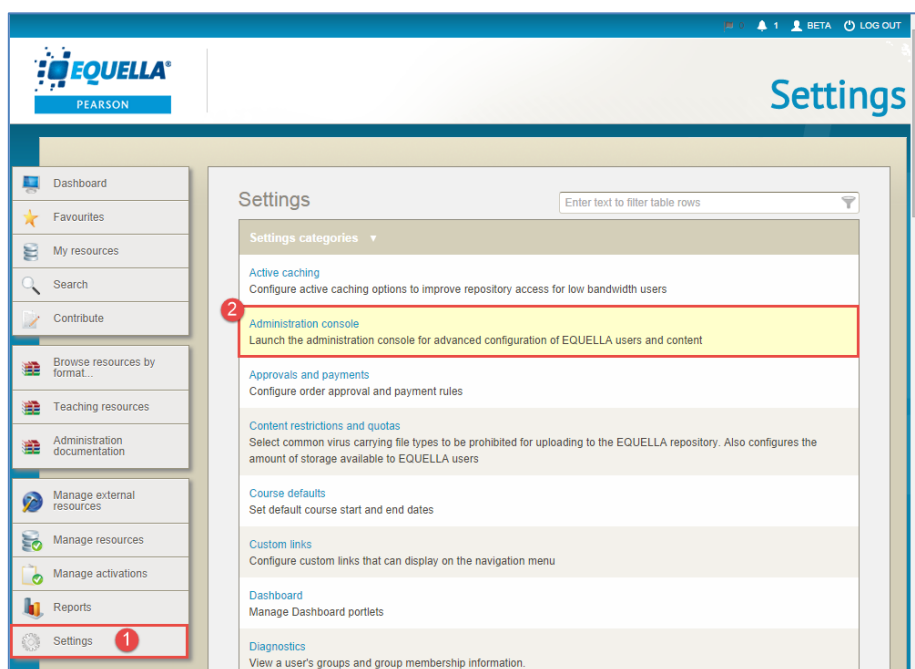

Figure 46 Settings - Administration console

The **Adminstration console** displays.

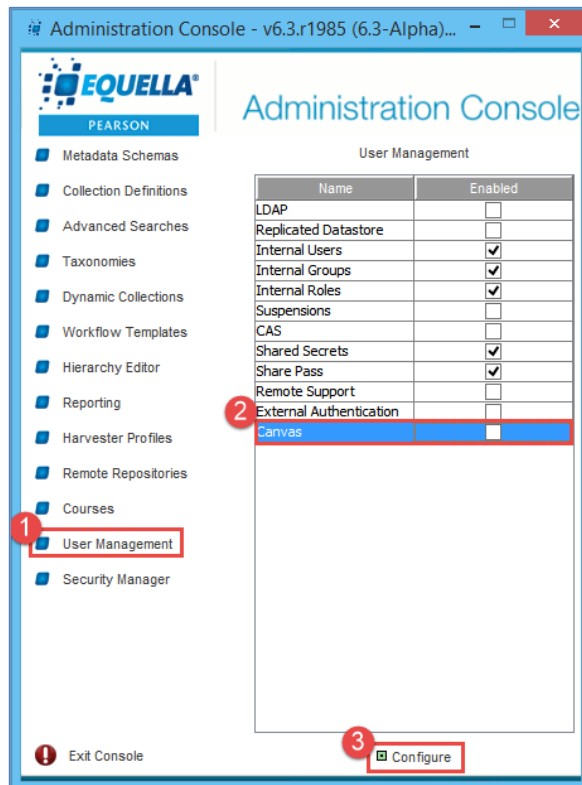2. Select **User management** to display user management options. An example is shown in Figure 47.

Figure 47 Administration Console - User Management – Canvas

3. Highlight **Canvas** then click [⊞ Configure] . The Canvas configuration dialog displays. An example is shown in Figure 48.
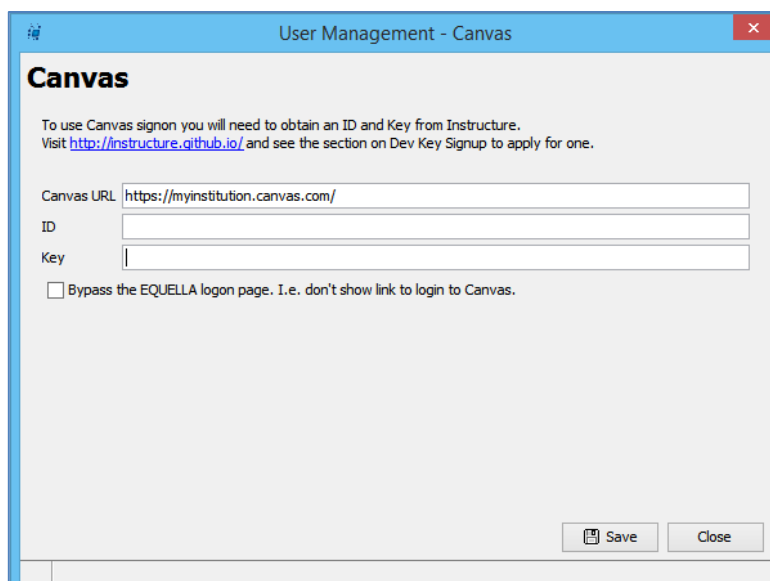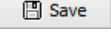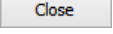

Figure 48 Canvas configuration dialog

4. Enter the institution's **Canvas URL** (e.g. *https://mystitution.canvas.com*).

5. Enter the Dev Key **ID** as supplied by Canvas.

6. Enter the **Key** as supplied by Canvas.

7. Select the **Bypass the EQUELLA logon page. I.e. don't show link to login to Canvas** to go straight to the Canvas login page when EQUELLA is accessed (or straight into EQUELLA if the user has previously logged in to Canvas).

8. Click [🖫 Save]. Once the save confirmation displays, click [Close]. The Canvas plug-in now needs to be enabled to start working.

To enable the Canvas plug-in

1. From the **Administration Console, User Management** page, select the **Canvas** *Enabled* checkbox. The **Enable Plugin?** confirmation dialog displays. An example is shown in Figure 49.
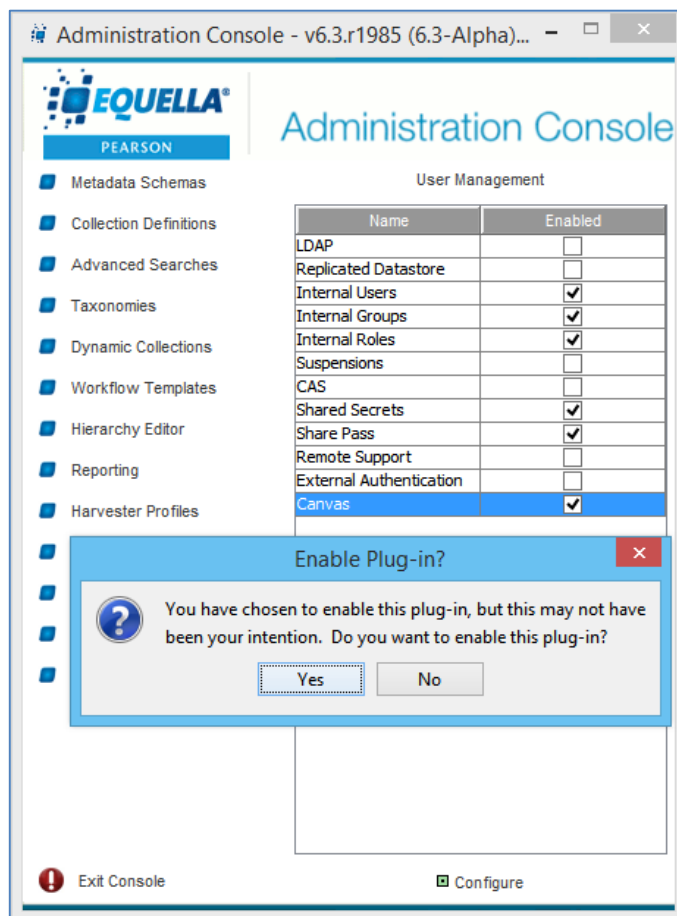

Figure 49 Enable Canvas plug-in

2. Click [Yes]. The Canvas plug-in is now enabled.

Contact Client Support

We are always happy to help.

If your organisation has a support agreement with EQUELLA then help is available at
http://equella.custhelp.com.