Canvas Admin Guide

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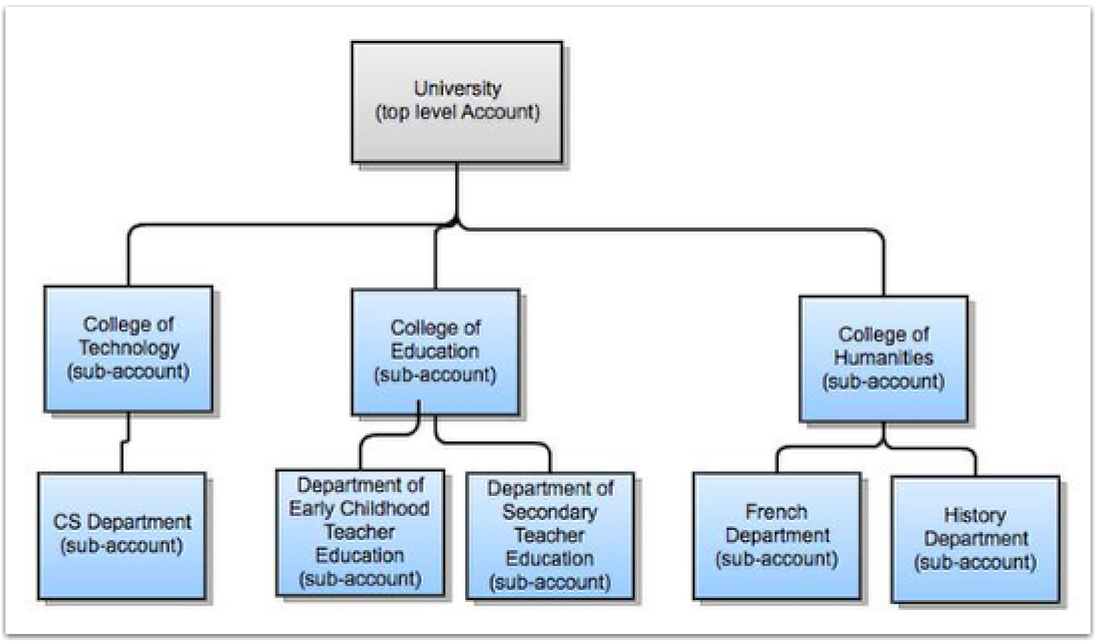
Accounts and Sub Accounts

What are accounts and sub-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 top-level account).

View Hierarchy



Once a hierarchy has been created, admins can be assigned to specific sub-accounts to limit their scope of what they can change as well as making the courses and people they manage more specific and relevant to them.

Permissions trickle down through the hierarchy but not up. Admins at one level (or account) in the hierarchy have admin permissions at that level as well as in any sub-account of that account. Admins can move courses *within* their sub-accounts, but not *between* them unless they are also the admin of the parent account of each sub-account.

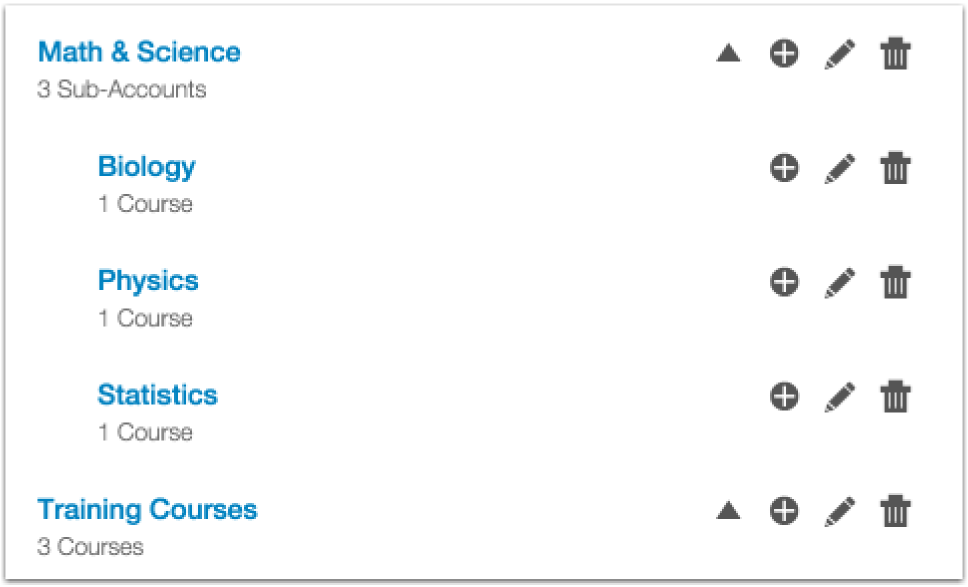
With the exception of Terms, SIS Imports, Authentication and a few account settings, most settings and items can be modified or, in the case of permissions, overridden in a sub-account.

[Learn how to organize sub-accounts](#).

How do I organize sub-accounts?

Sub-accounts are often used to manage permissions and organizational hierarchy within an institution. 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.

Many clients set up sub-account organizational structures that mirror their SIS or registration systems. Sub-accounts can be manually or automatically created within Canvas using integrations from other systems.



Admins, users, and courses can be assigned to sub-accounts. A user can hold different roles in each sub-account. Sub-accounts can be used to create and access question banks, outcomes, rubrics, grading schemes, reports, and analytics. Permissions within sub-accounts flow downward by default. For example, an admin at the top-level account or sub-account will be an admin in every sub-account below the account or sub-accounts.

Although terms cannot be created in sub-accounts, many clients will create terms at the top account level that can be used by specific sub-accounts so each can have different access dates.

Organize accounts based on:

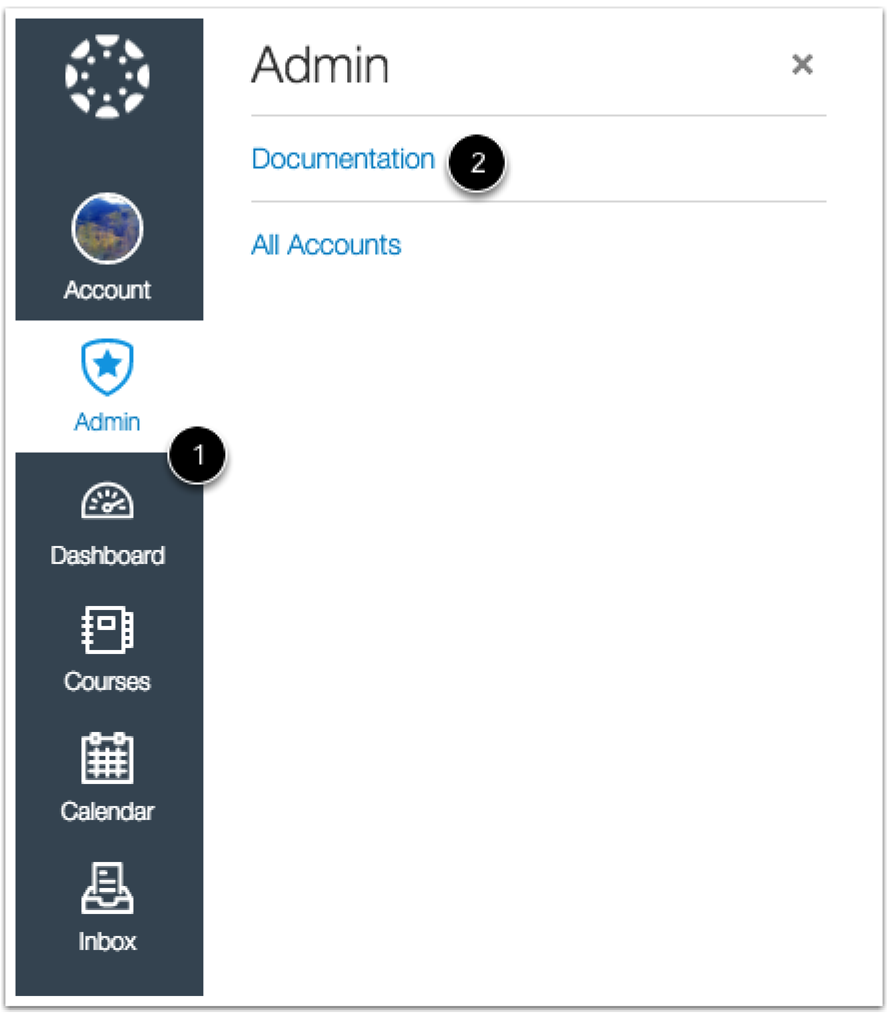
- Departments > Term Dates. For example: Science Department > Fall 2012/Spring 2013/Summer 2013
- Departments > Sub-Departments. For example: Science Department > Physics/Biology/Chemistry
- Departments > Sub-Departments > Course Type. For example; Science Department > Biology > Face to Face/ Blended/Fully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

How do I view a sub-account?

You can view a sub-account within Managed Accounts in Canvas. Sub-accounts are located within a top-level account (also known as a parent account or root account). Each root account can include additional sub-accounts.

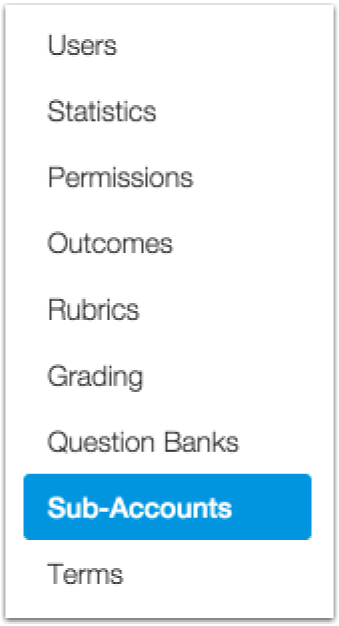
Note: Each account will automatically include a sub-account called Manually-Created Courses that manages multiple backend processes for Canvas and cannot be deleted.

Open Account



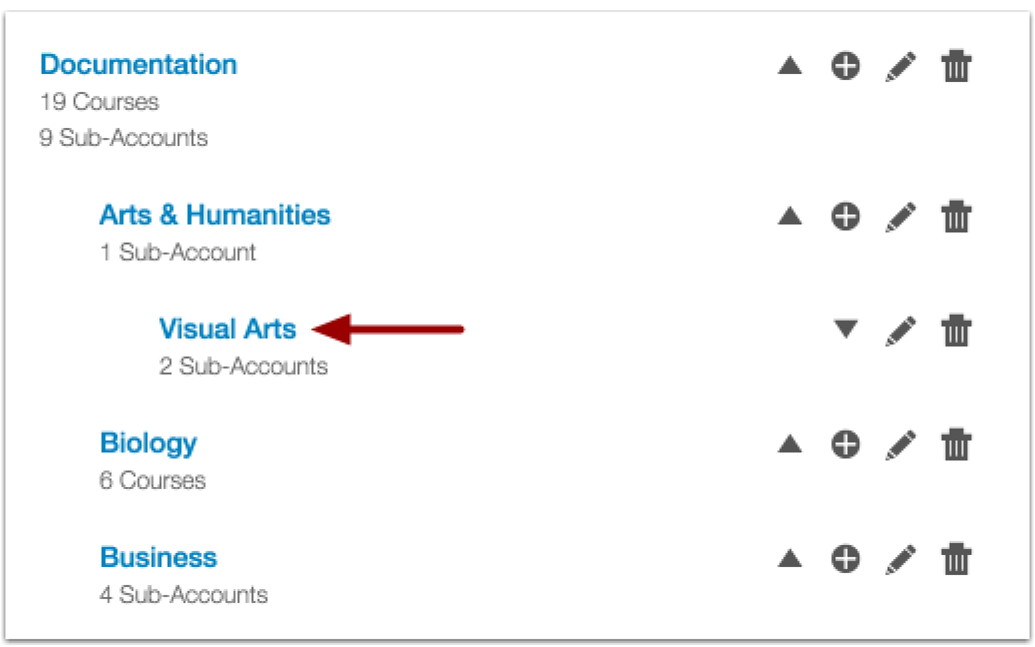
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Sub-Accounts



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

View Sub-Accounts



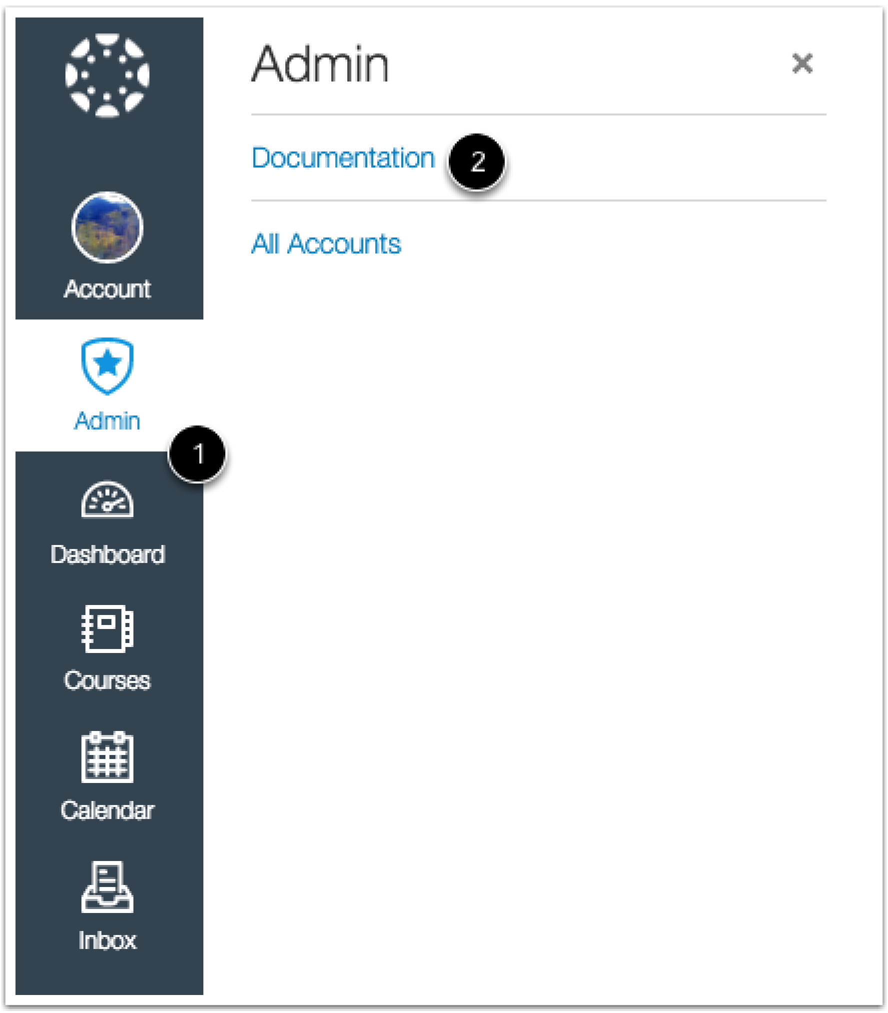
Sub-accounts are listed in alphabetical order. To view a sub-account, click the name of the sub-account.

How do I create a sub-account?

You can create sub-accounts within Managed Accounts in Canvas.

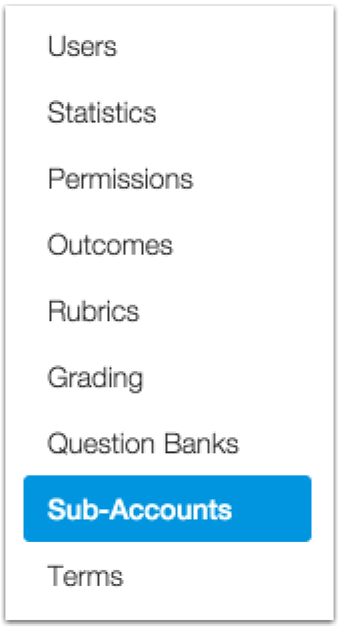
View a video about Sub-Accounts.

Open Account



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

Open Sub-Accounts

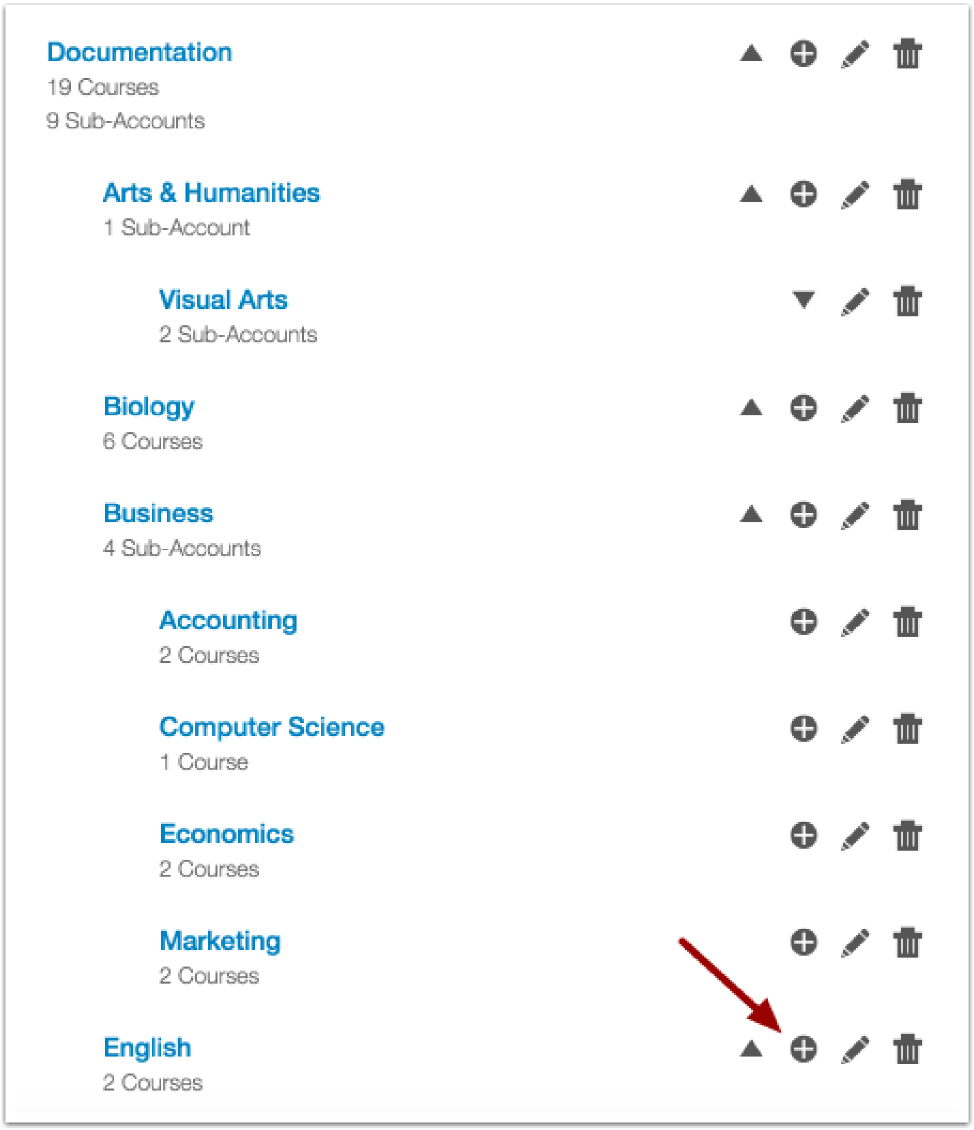


In Account Navigation, click the **Sub-Accounts** link.

Show Accounts

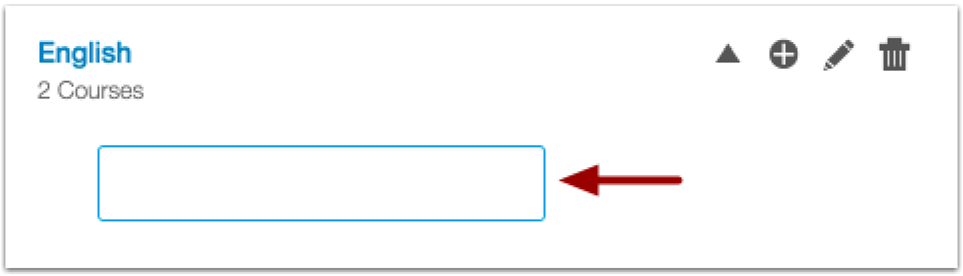
Click the **down arrow** to show sub-accounts.

Add Sub-Account



Click the **Add** button.

Title Sub-Account



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

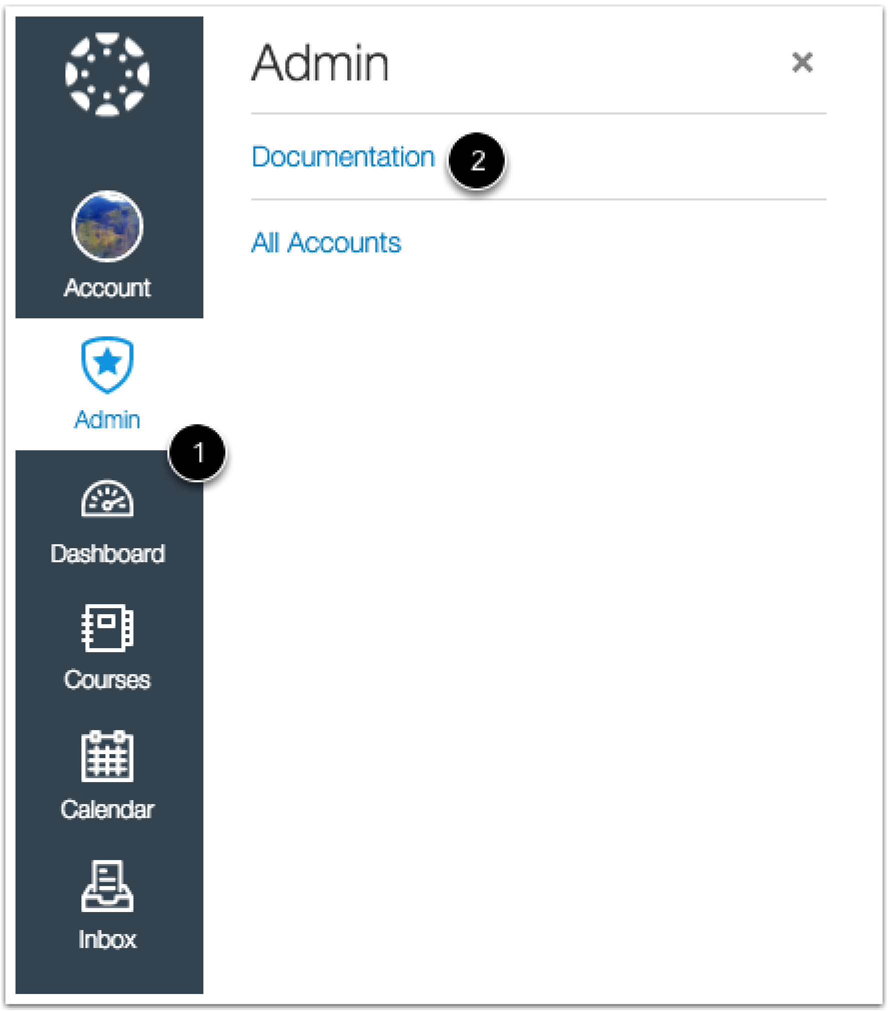
View the created sub-account.

How do I delete a sub-account?

You can delete a sub-account within Managed Accounts in Canvas. The Manually-Created Courses sub-account manages multiple backend processes and, if deleted, will automatically be re-created for the sub-account.

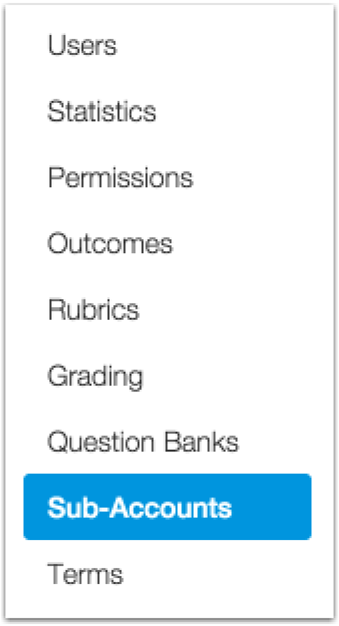
Note: You can't delete a sub-account that has courses in it.

Open Account



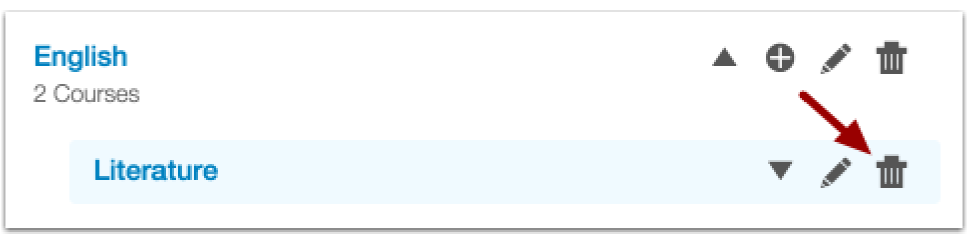
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Sub-Accounts



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

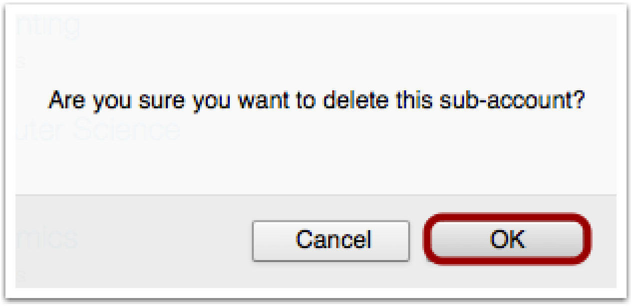
Delete Sub-Account



Click the **Delete** icon to delete the sub-account. A pop-up window will appear in your browser.

Note: You can't delete a sub-account that has courses in it.

Confirm Deletion

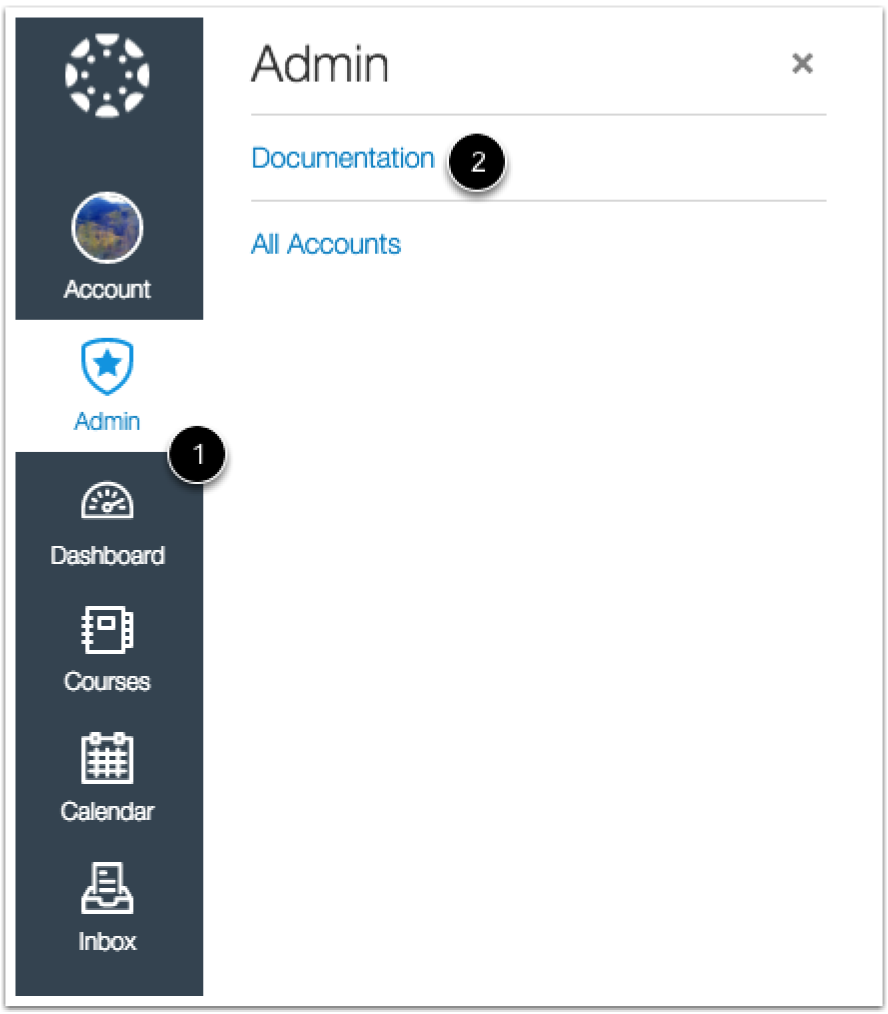


Click the **OK** button.

How do I edit the name of a sub-account?

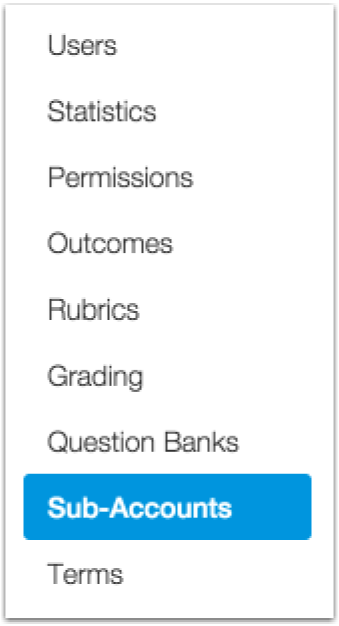
You can edit the name of a sub-account within Managed Accounts in Canvas.

Open Account



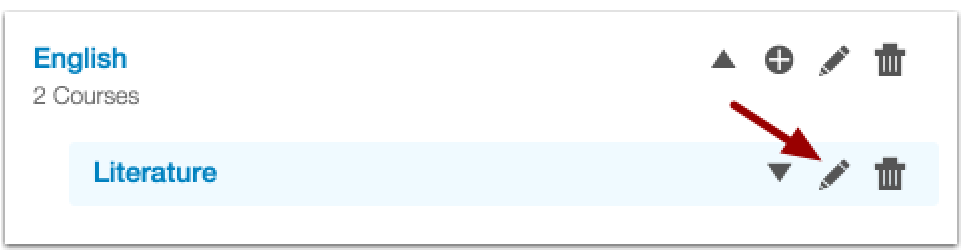
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Sub-Accounts



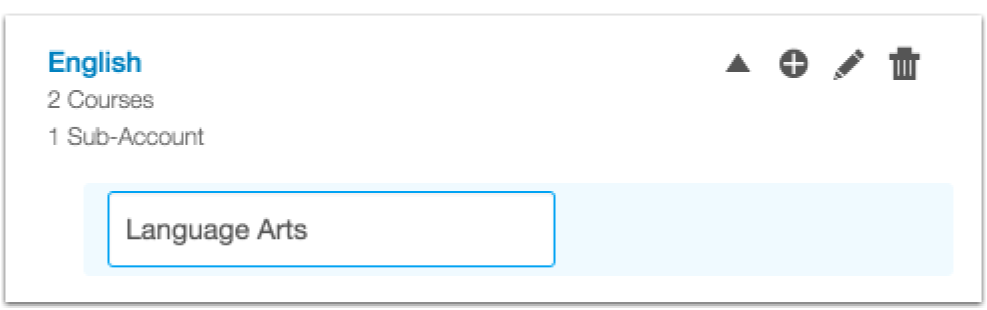
In Account Navigation, click the **Sub-Accounts** link.

Edit Sub-Account



Next to the sub-account, click the **Edit** icon.

Edit Sub-Account Name



Edit the name of the sub-account by typing in the name field. To save your changes, press the **Return** or **Enter** key.

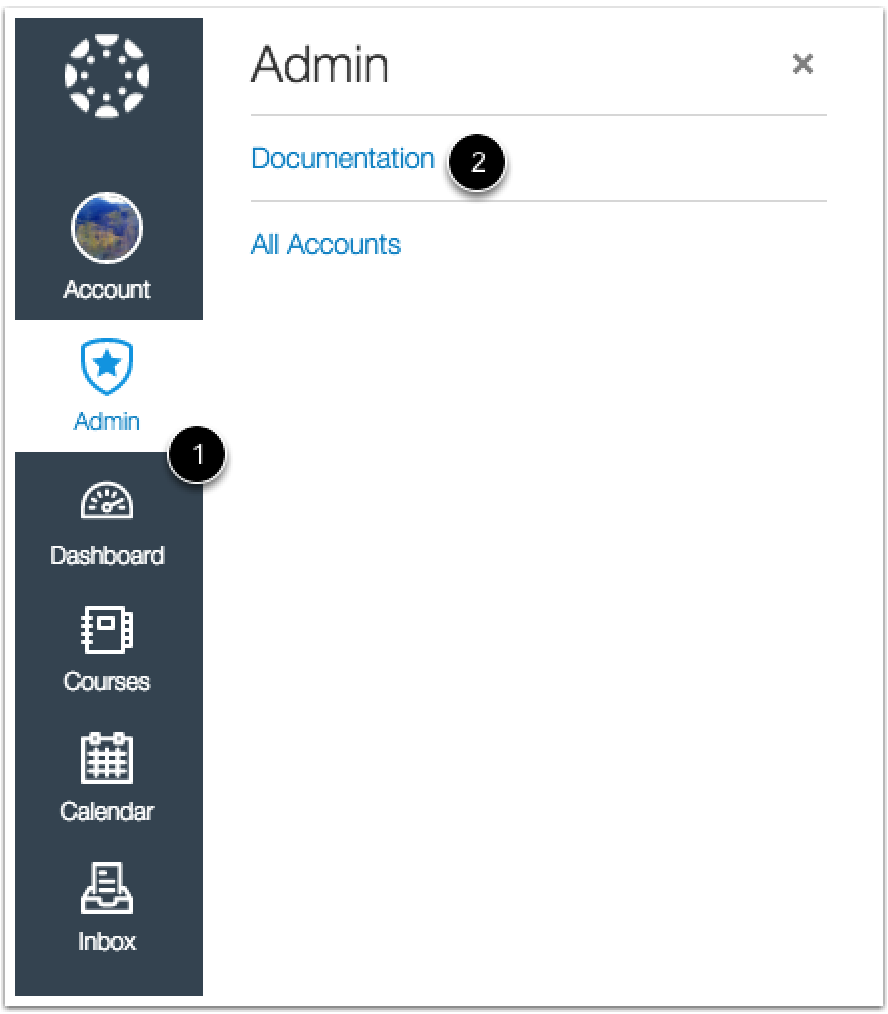
View Sub-Account

View the sub-account.

How do I hide a sub-account?

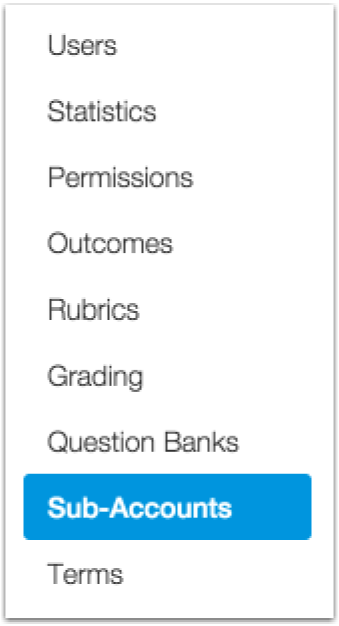
You can hide a sub-account within Managed Accounts in Canvas.

Open Account



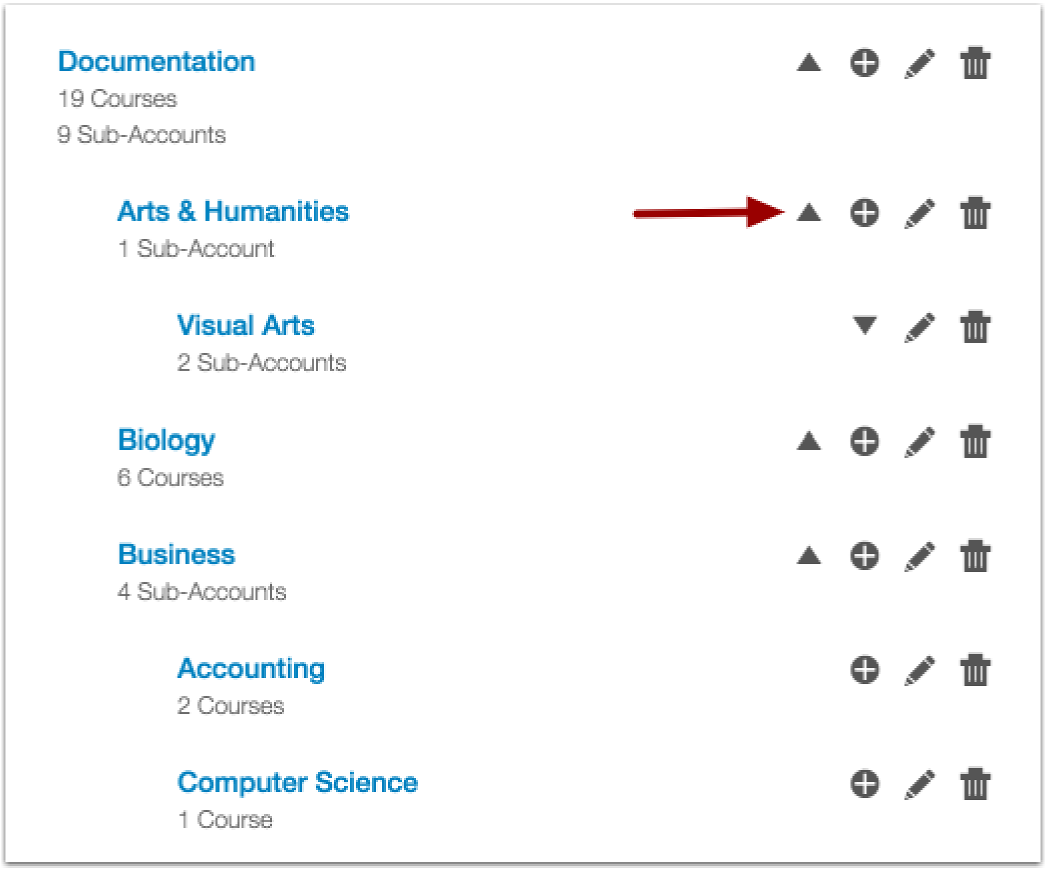
In Global Navigation, click the **Admin** link [1], then click the name of the account [2]

Open Sub-Accounts



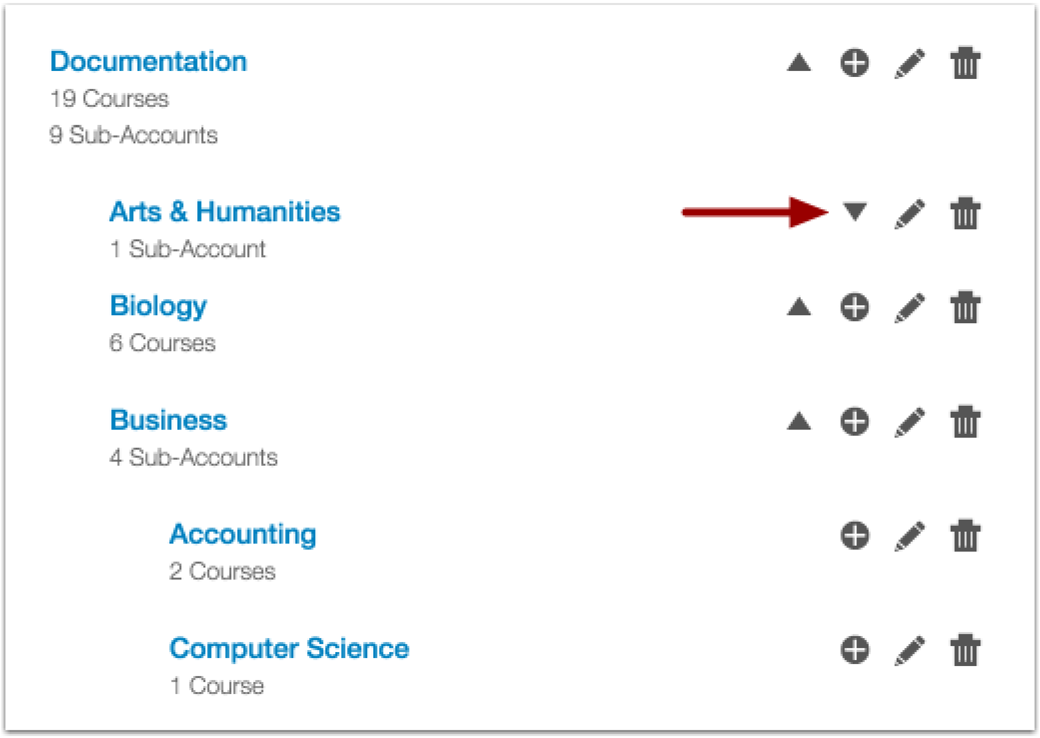
In Account Navigation, click the **Sub-Accounts** link.

Hide Sub-Accounts



To hide the sub-accounts, click the **Up Arrow** icon.

Show Sub-Accounts



To show the sub-accounts, select the **Down Arrow** icon.

How do I add an administrative user to an account?

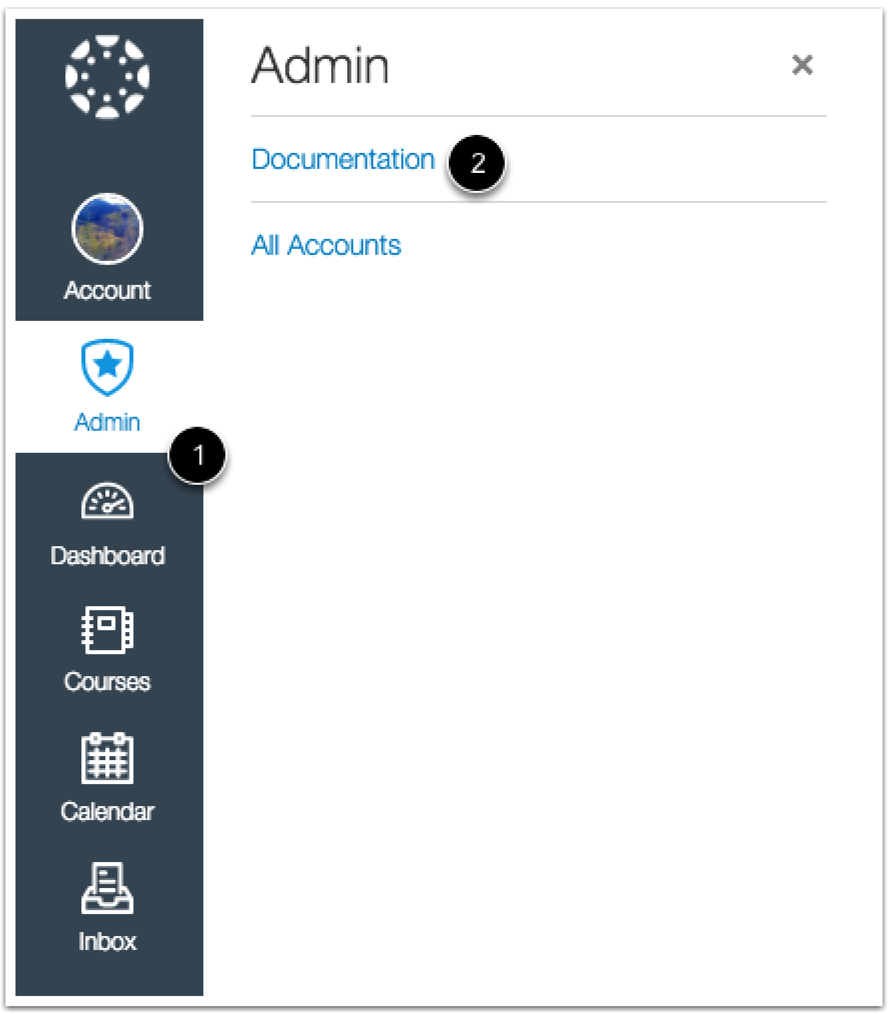
You can add administrative users to an account in your Settings.

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

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

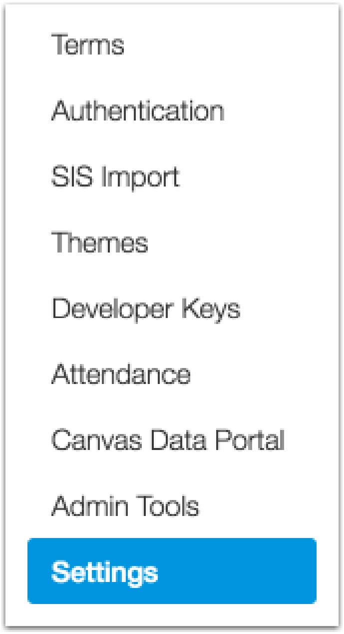
Note: When adding an administrative user, you must assign the user to an account role. Before adding a user, ensure that you have created the necessary account-level role.

Open Account



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

Open Settings

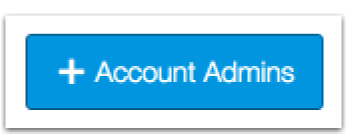


In Account Settings, click the **Settings** link.

Open Admins

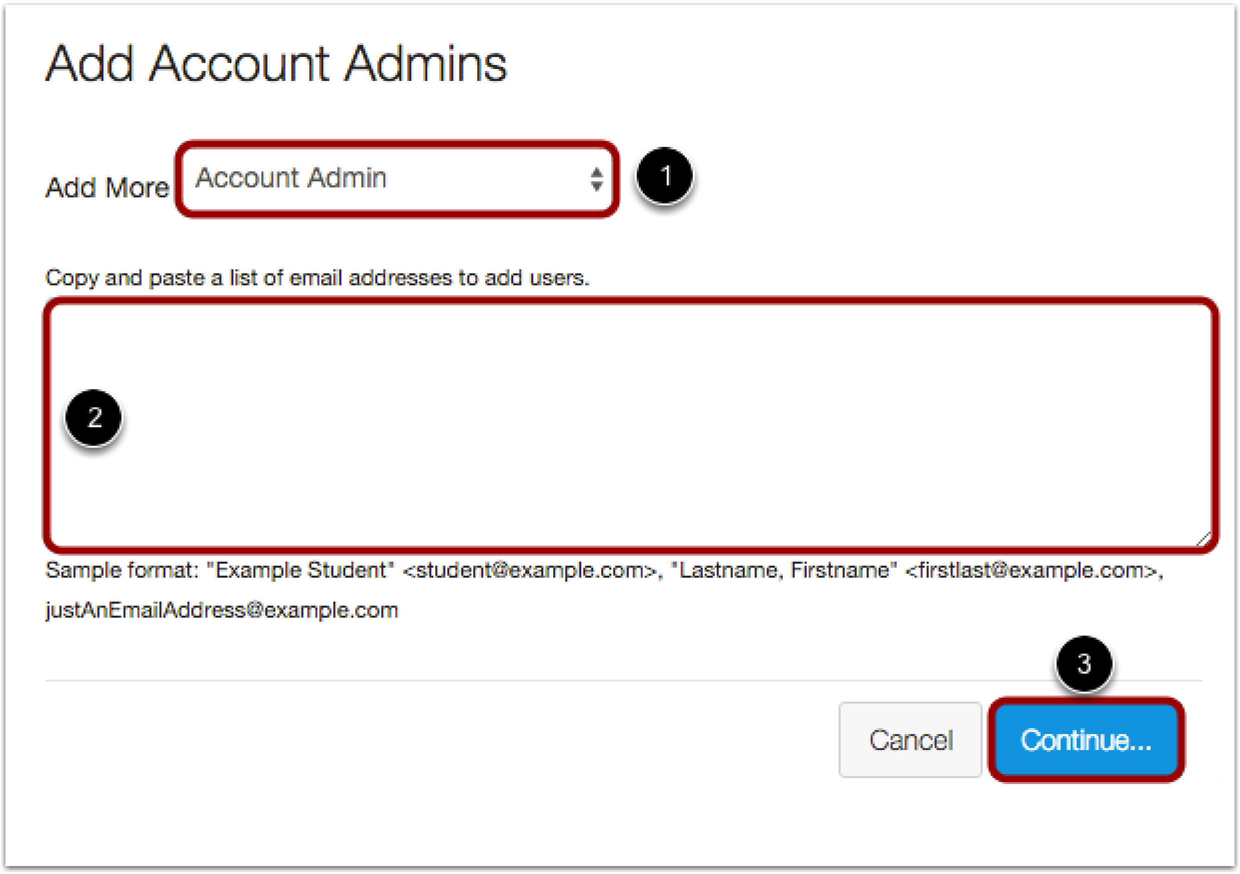
Click the **Admins** tab.

Add Account Admins



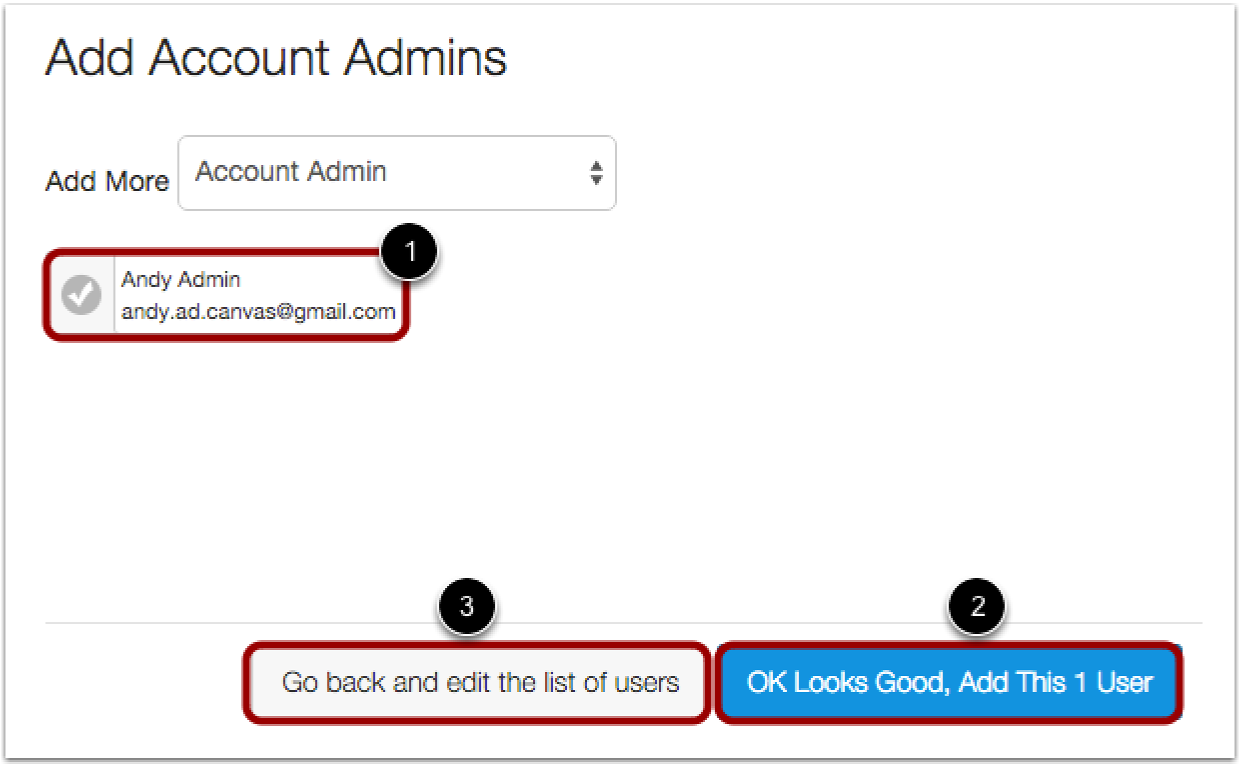
Click the **Add Account Admins** button.

Add Admin Role and Email



In the **Add More** drop-down menu [1], set the admin role type. In the text box [2], type the email address of the user. Click the **Continue...** button [3].

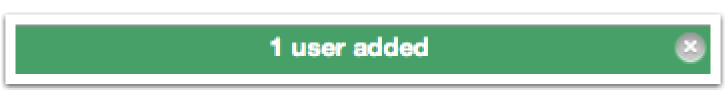
Add Account Admins



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



Verify the new administrative user was added.

How do I upload custom JavaScript and CSS files to an account or sub-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 subaccounts, though you can upload CSS/JS files for individual subaccounts.

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 regular 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

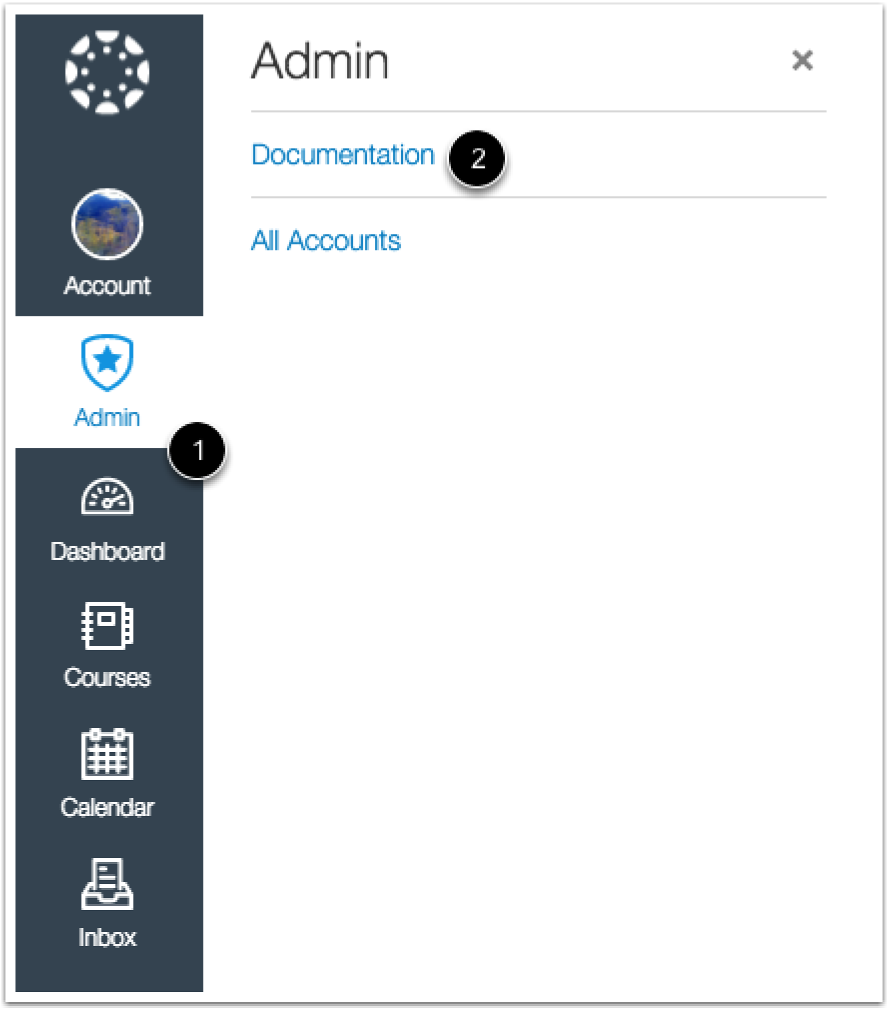
If you cannot use the native Theme Editor options for branding, *you must be aware of the associated risks of using custom files, which may cause accessibility issues or conflicts with future Canvas updates:*

- 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.
- When experimenting with custom branding, always confirm your branding changes in your institution's beta environment or test environment.

Notes:

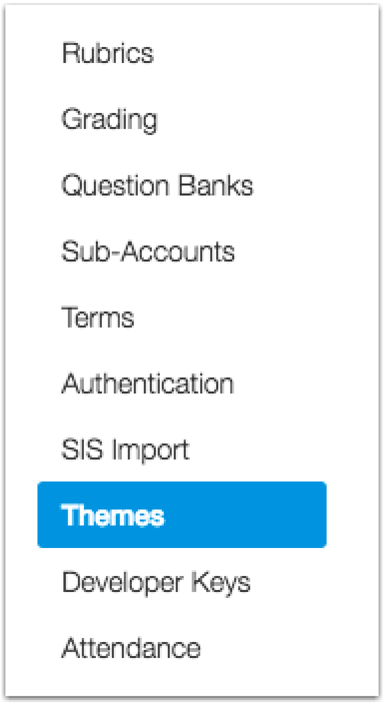
- The Theme Editor is not available for two-week trial or Free-For-Teacher accounts.
- If you are a subaccount admin and the Themes link is not visible in Account Navigation, Themes has not been enabled for sub-accounts. If the CSS/JS Upload tab is not visible, file uploads have not been enabled for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

Open Account



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

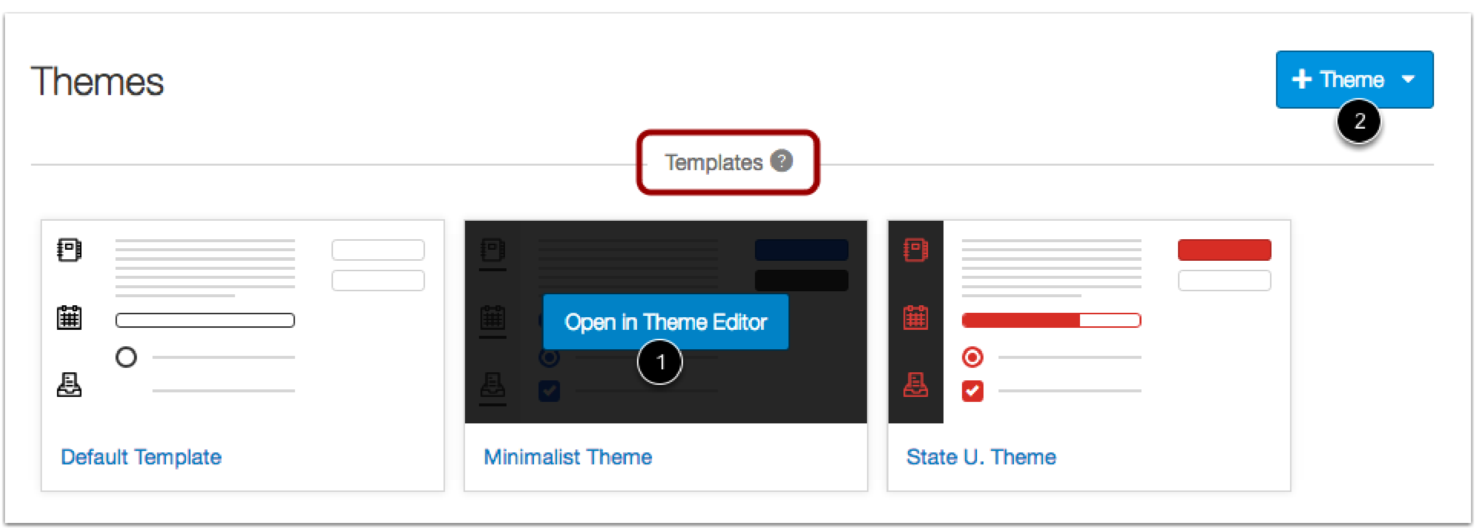
Open Themes



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.

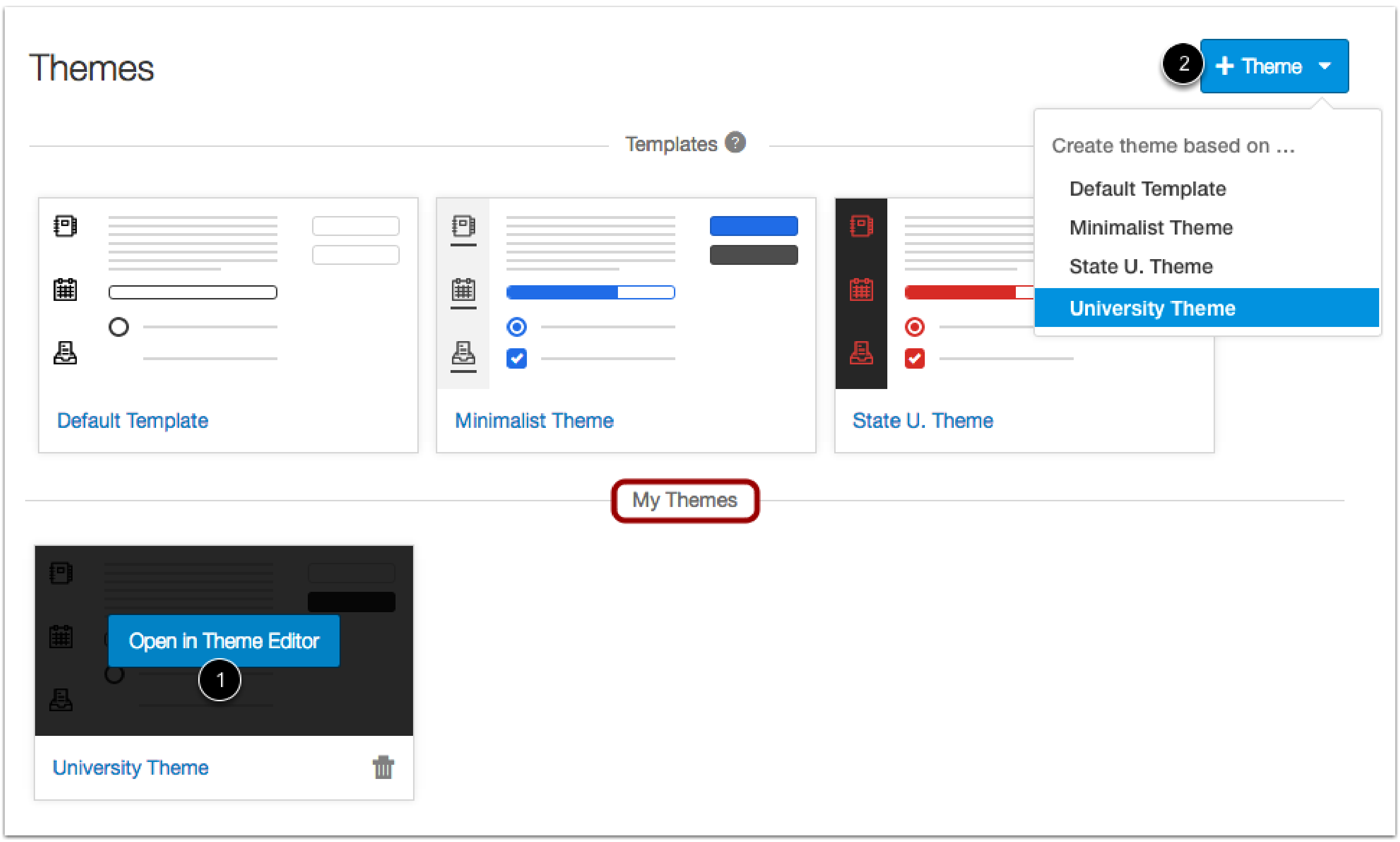
Open Theme Template



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.

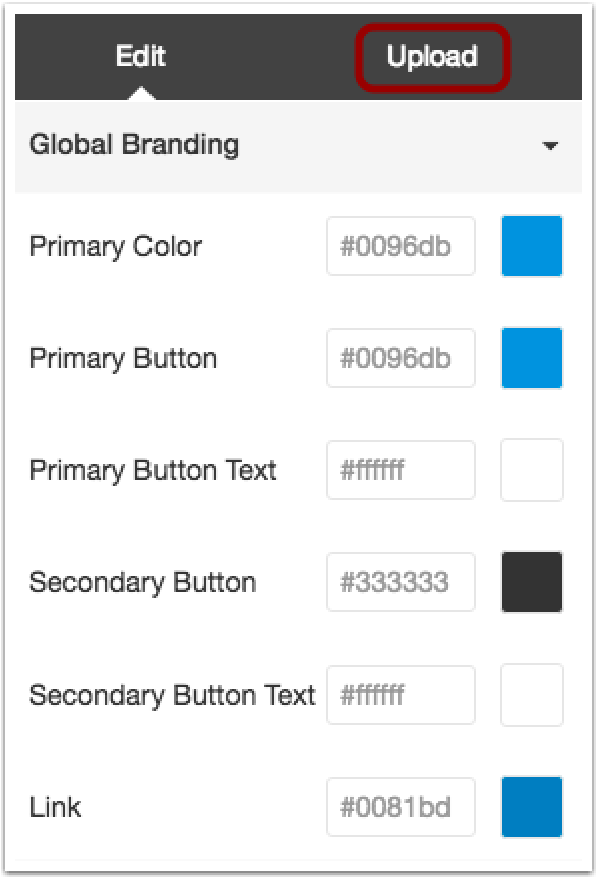
Open Saved Theme



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.

Upload Custom Files



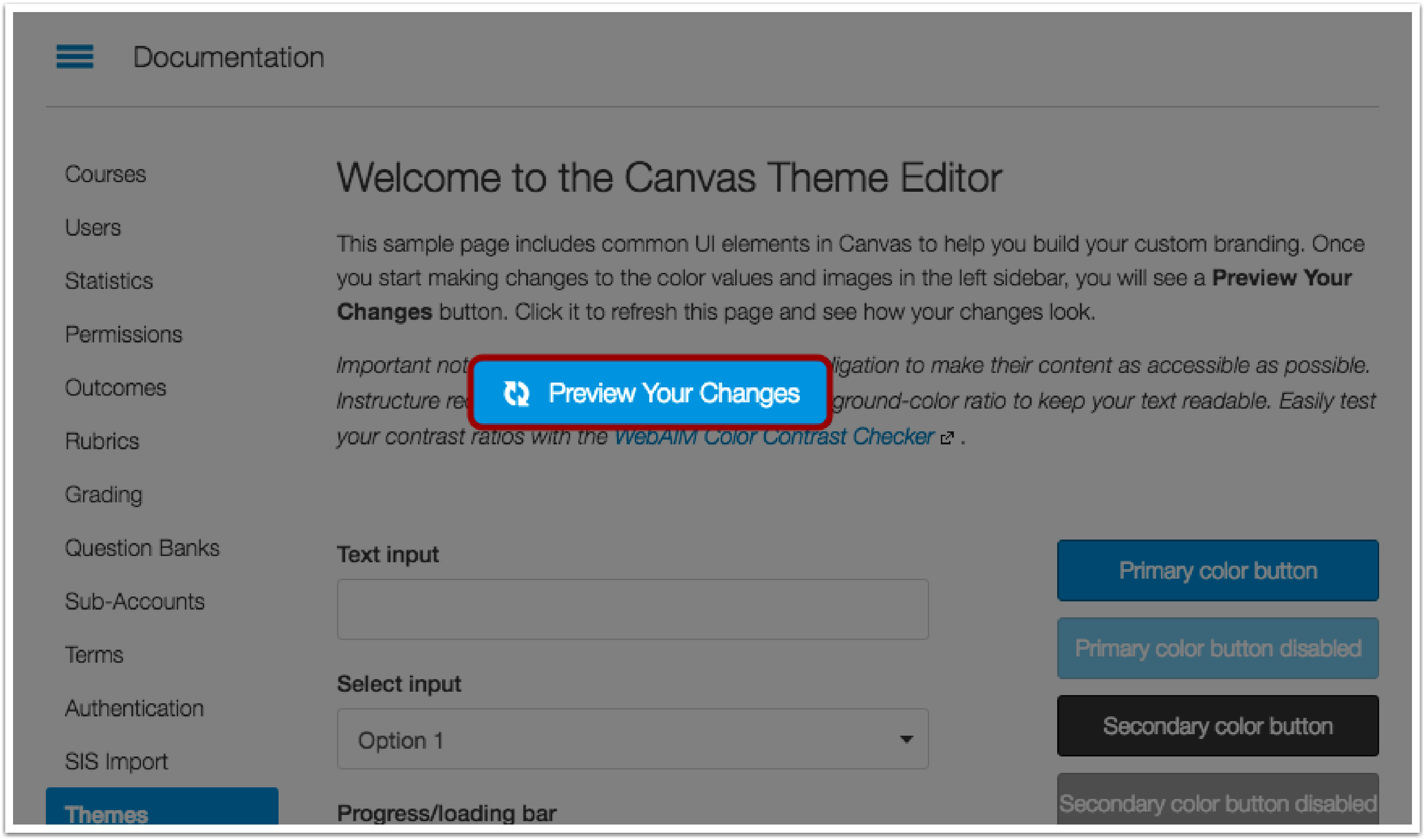
In the Theme Editor sidebar, click the **Upload** tab.

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.

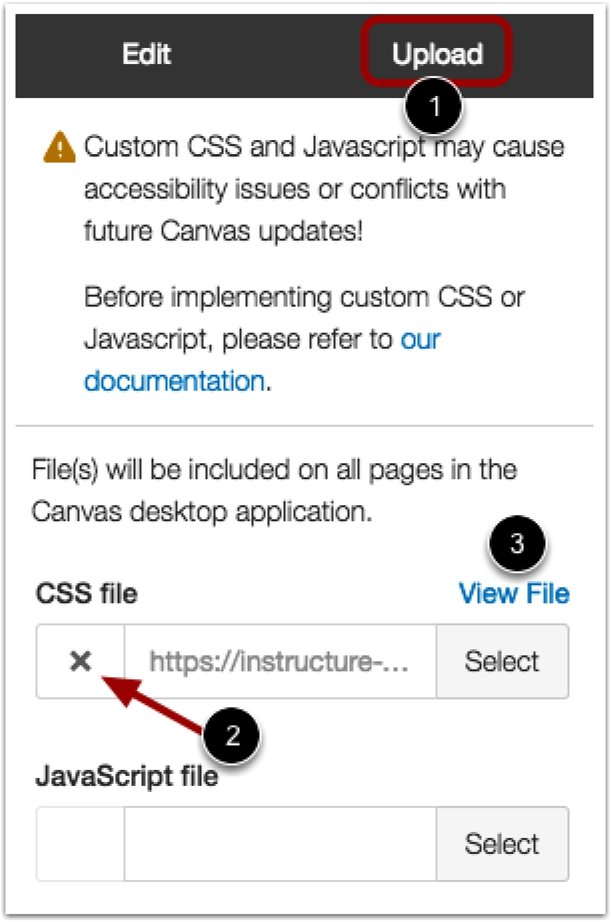
Preview Theme



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].

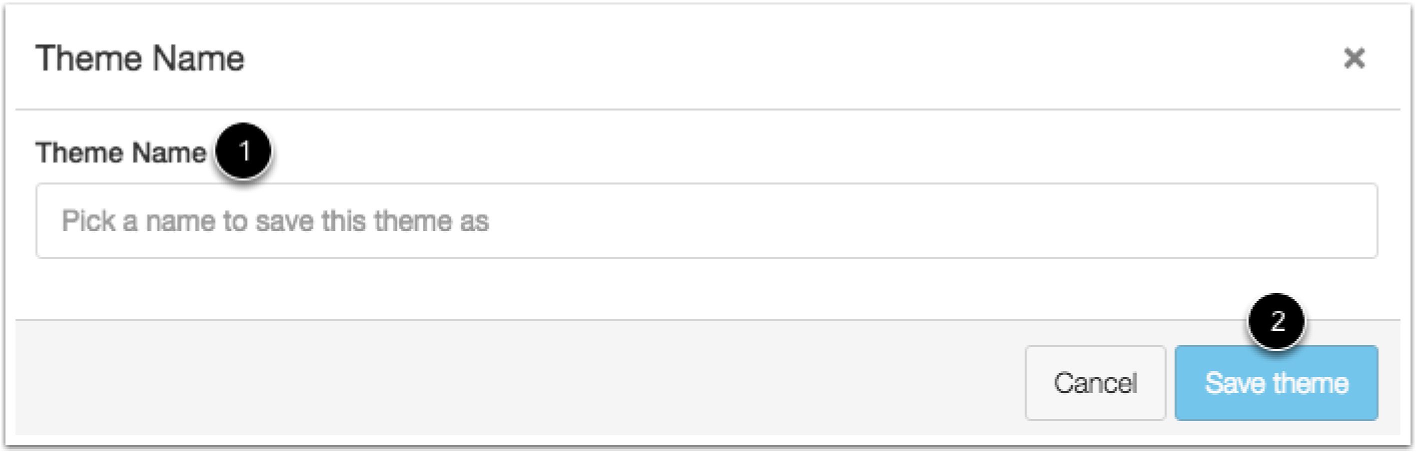
To remove and upload a new file, click the **Remove** icon [2]. You can make additional changes and upload your revised file.

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].

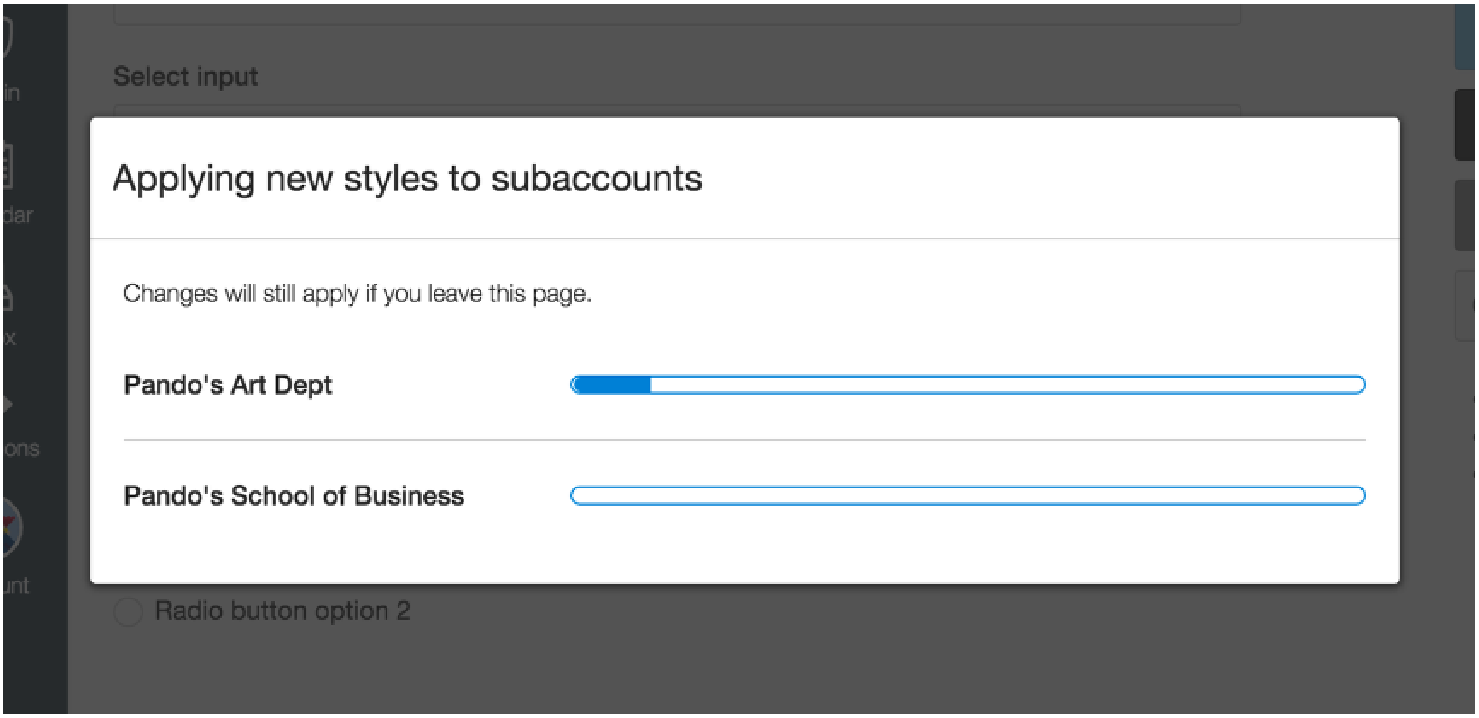
Note: If you edited a previously saved theme, saving the theme overwrites the previous version of the theme and uses the same theme name.

Apply Theme

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

To exit the theme and 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.

View Sub-Account Theme Updates



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 manage themes for an account?

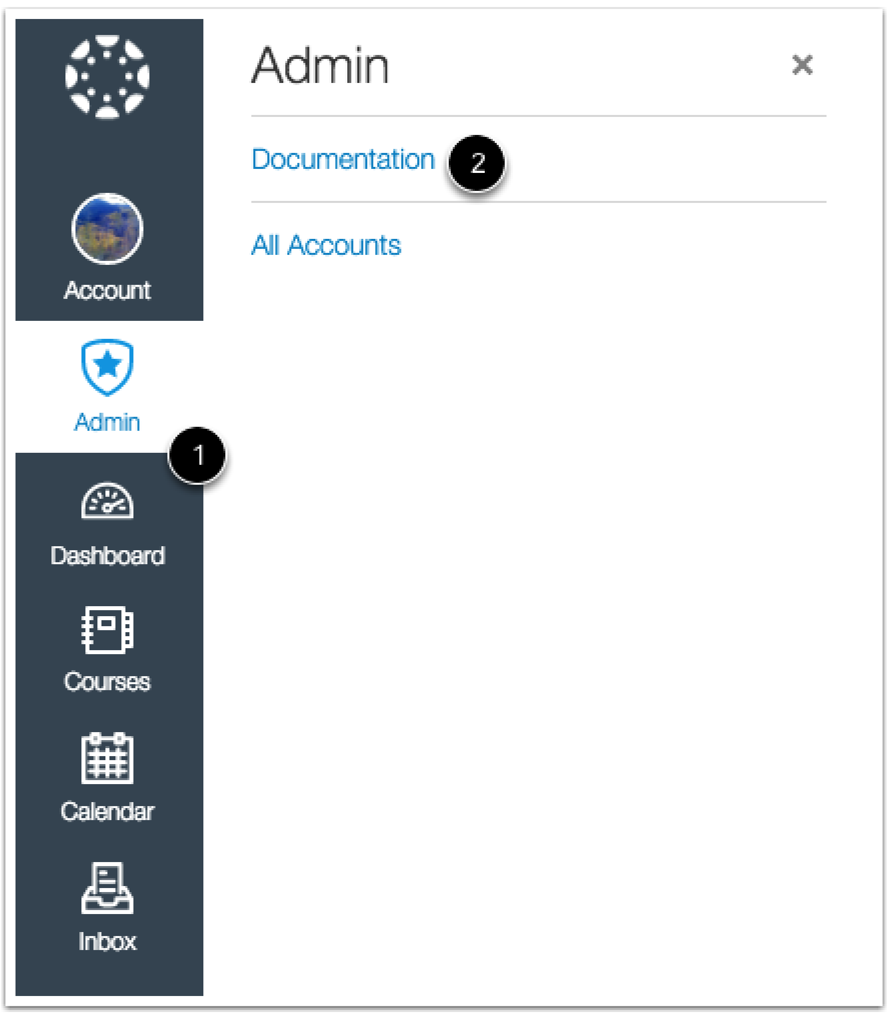
Each Canvas account displays a default Canvas theme. As an admin, you can create and manage themes designed specifically for your institution.

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

To learn how theme branding is displayed for courses vs user data, learn how to create a theme for an account.

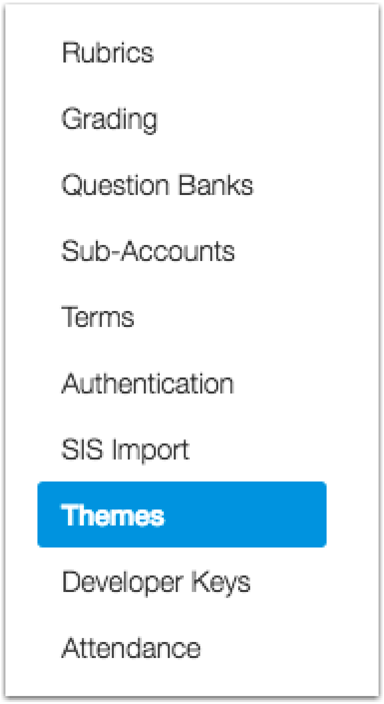
Note: If you are a sub-account admin and the **Themes** link is not visible in Account Navigation, Themes has not been enabled for sub-accounts.

Open Account



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

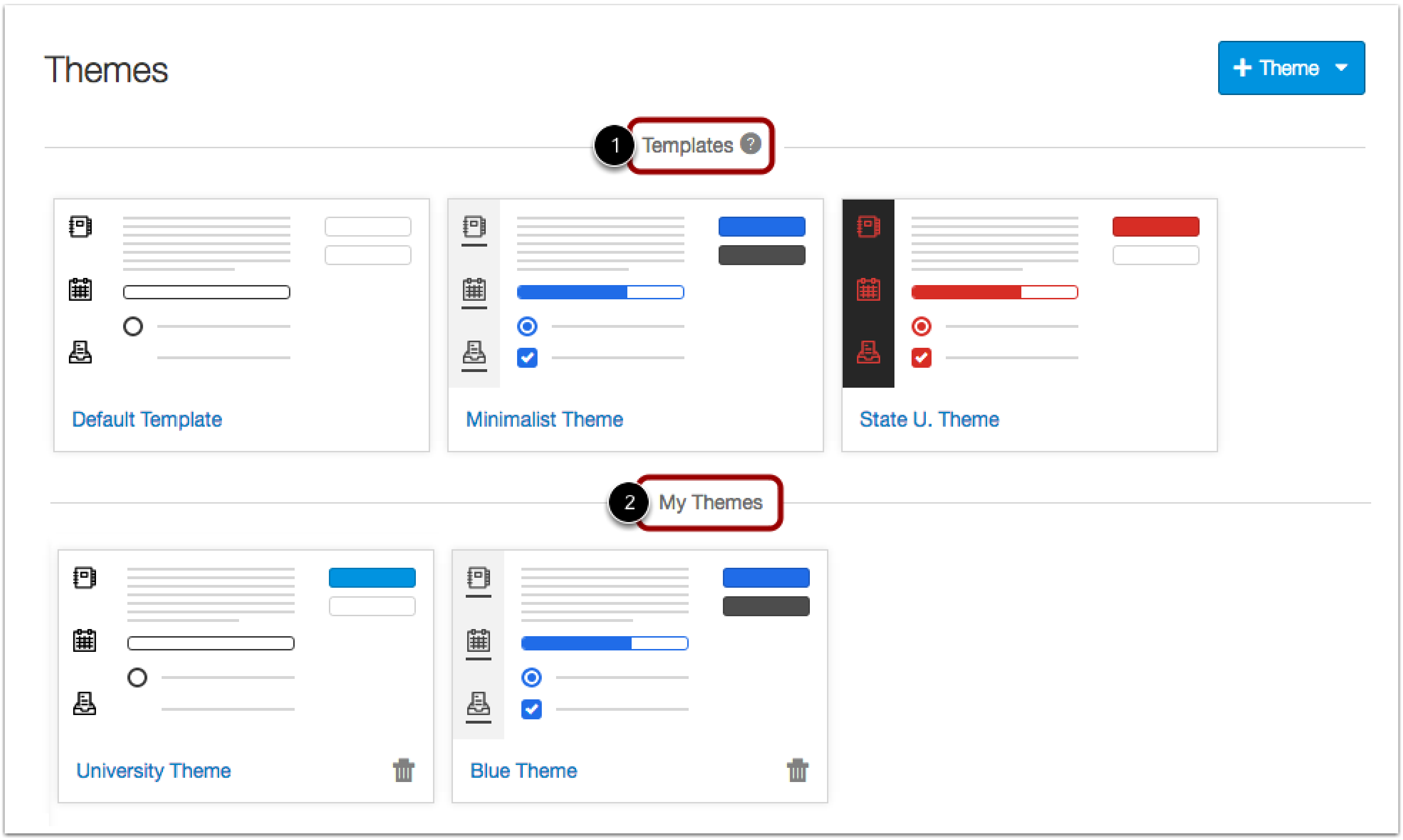
Open Themes



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

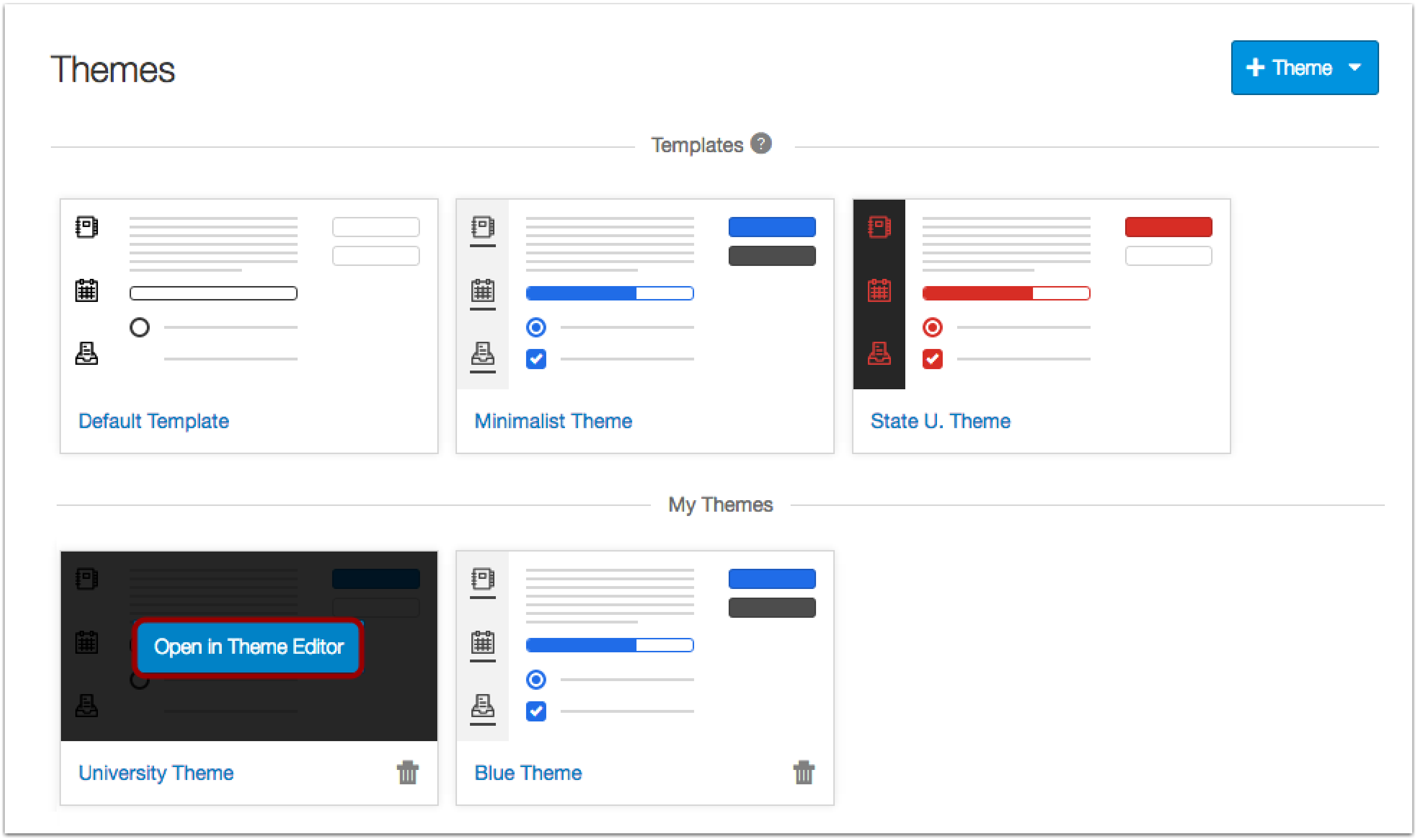


The Themes page displays all available templates and saved themes for your institution.

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.

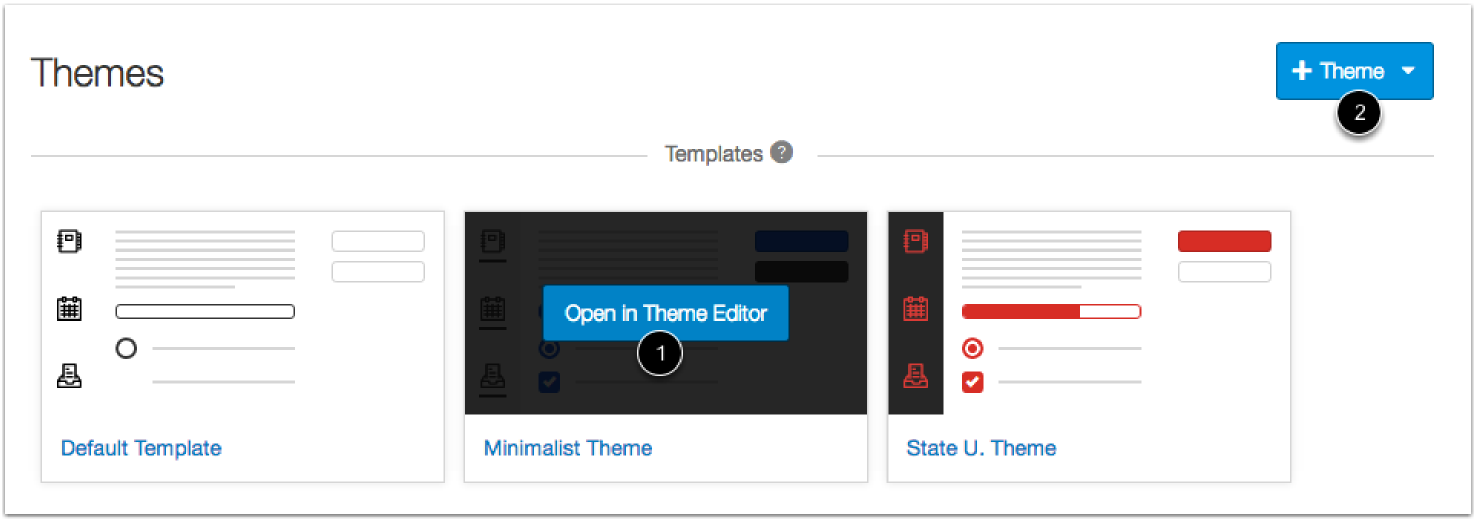
Once a theme is saved in the account, the page displays the My Themes section [2]. My Themes shows all themes saved for the account.

Open Theme



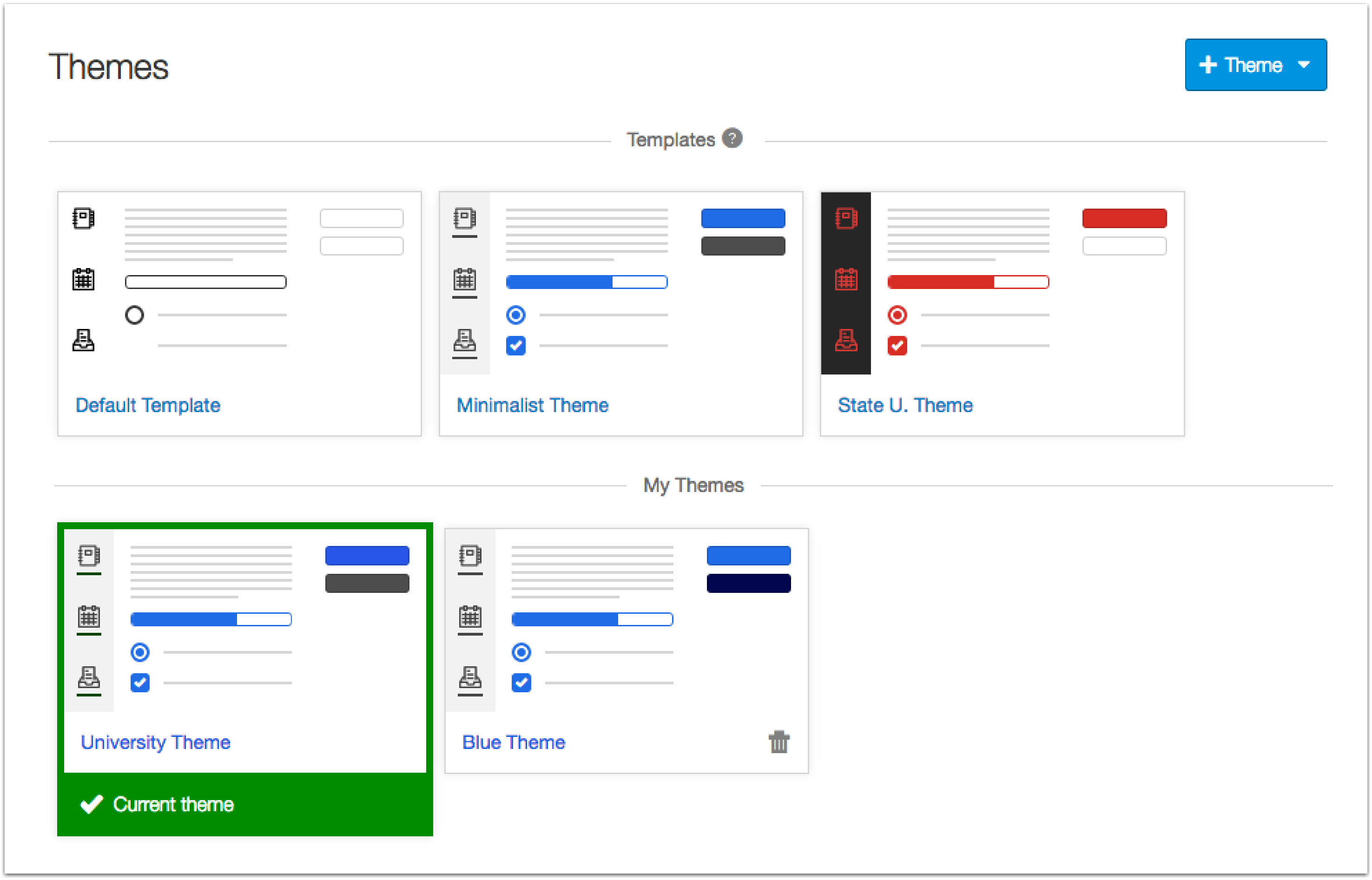
To open and view any theme, hover over the theme and click the **Open in Theme Editor** button.

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.

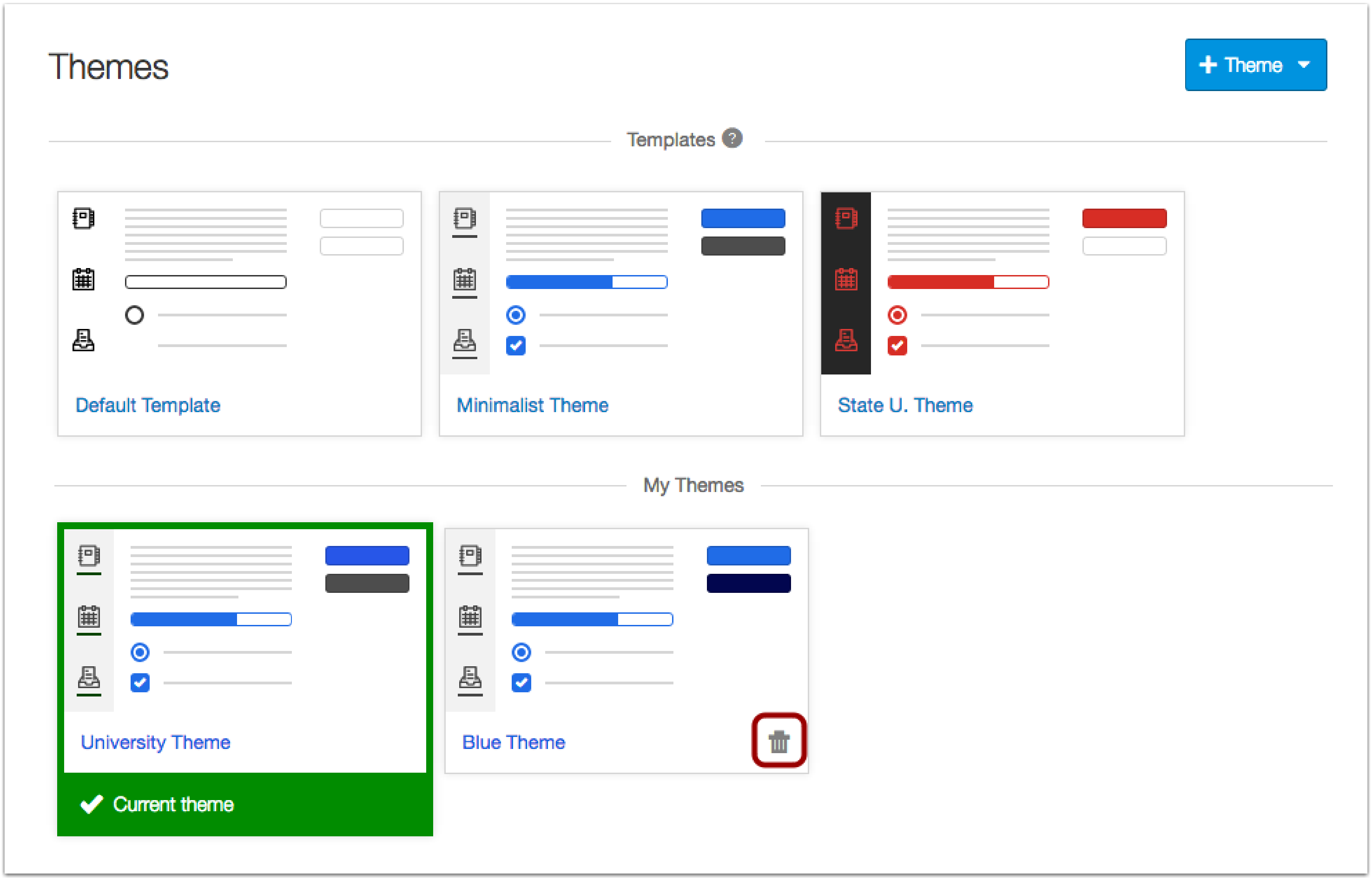
View Current Theme



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.

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, 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.

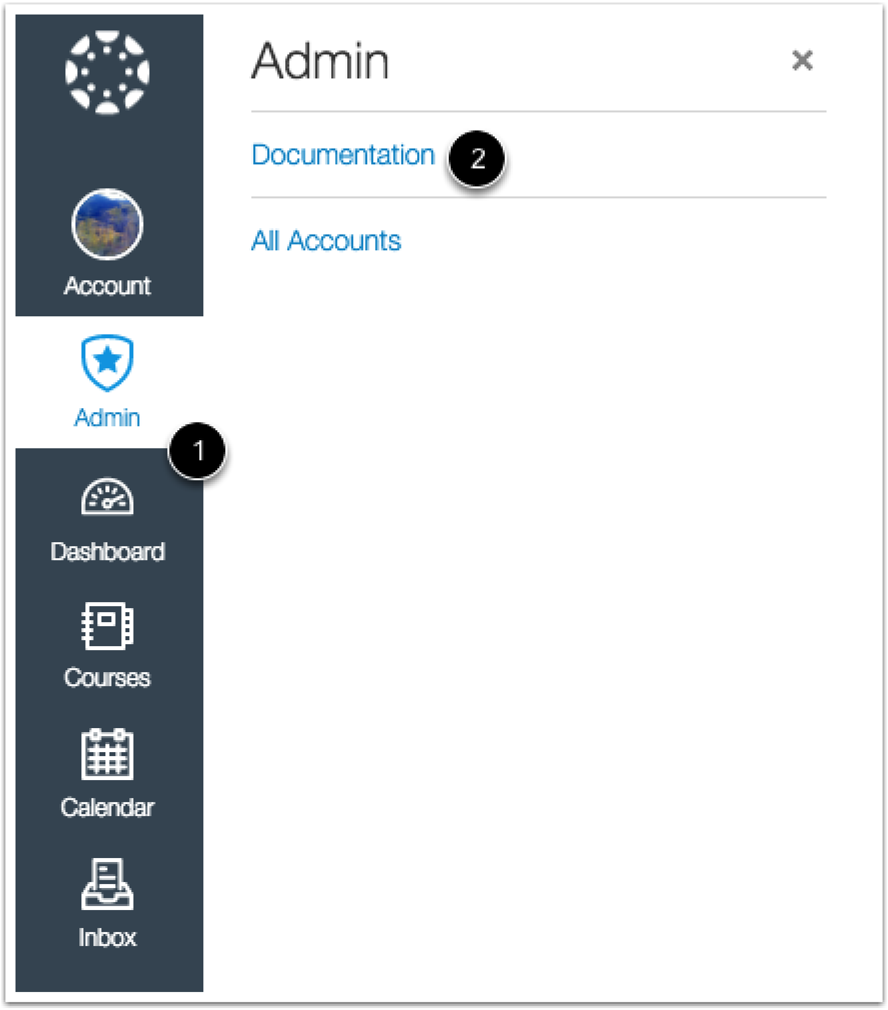
CSS/JS Files

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:

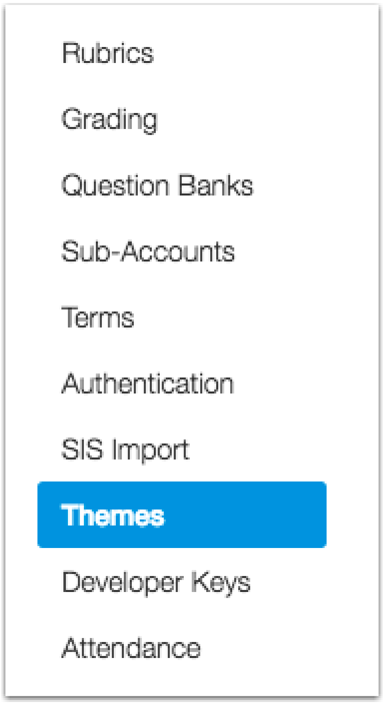
- The Theme Editor is not available for two-week trial or Free-For-Teacher accounts.
- If you are a subaccount admin and the Themes link is not visible in Account Navigation, Themes has not been enabled for sub-accounts. If the CSS/JS Upload tab is not visible, file uploads have not been enabled for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

Open Account



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

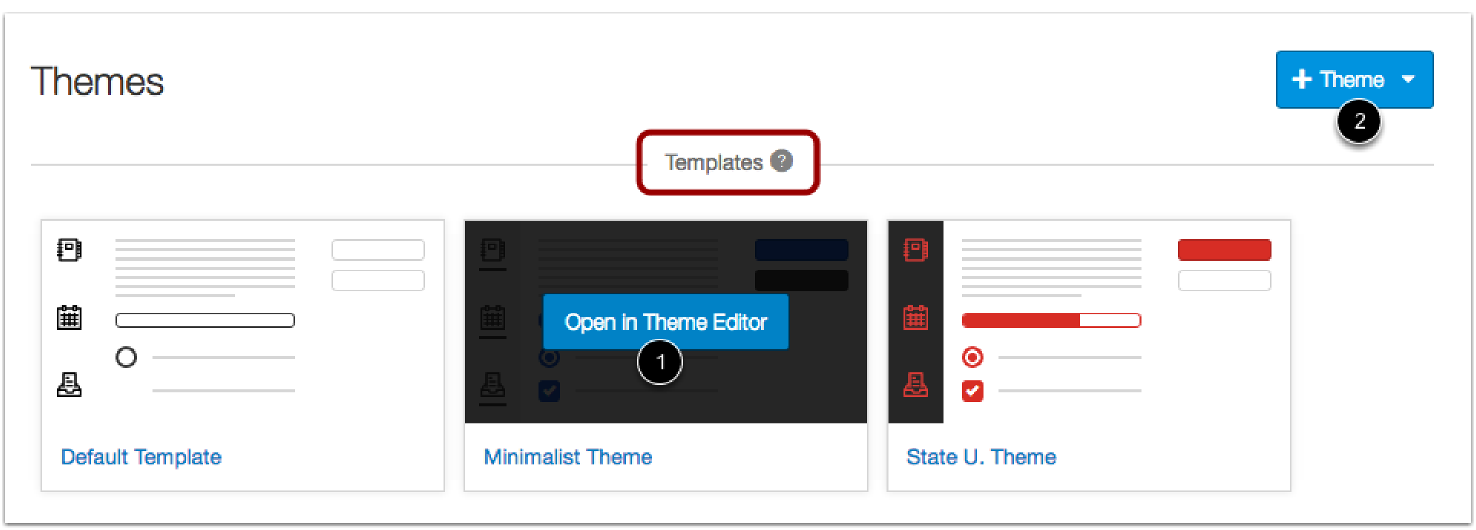
Open Themes



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.

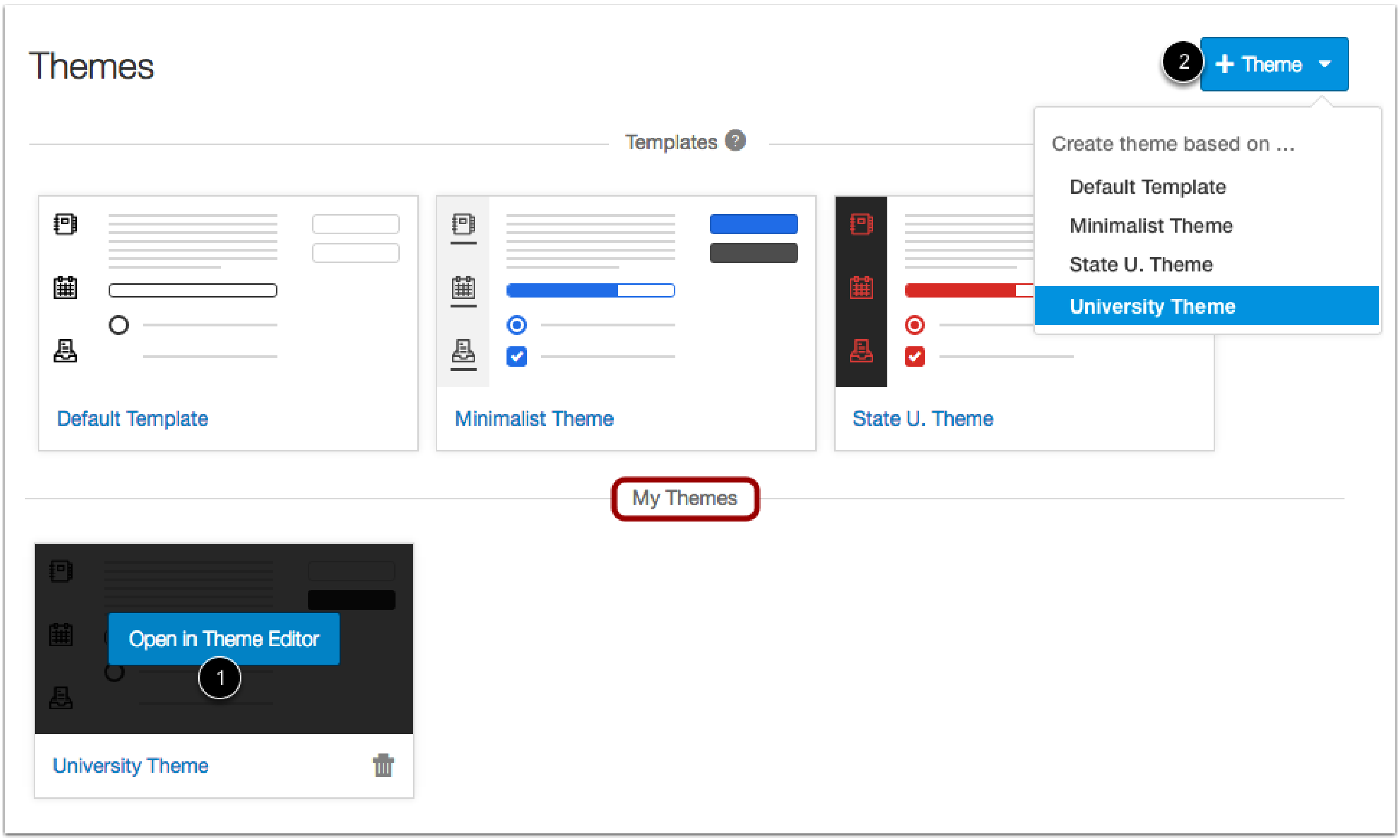
Open Theme Template



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.

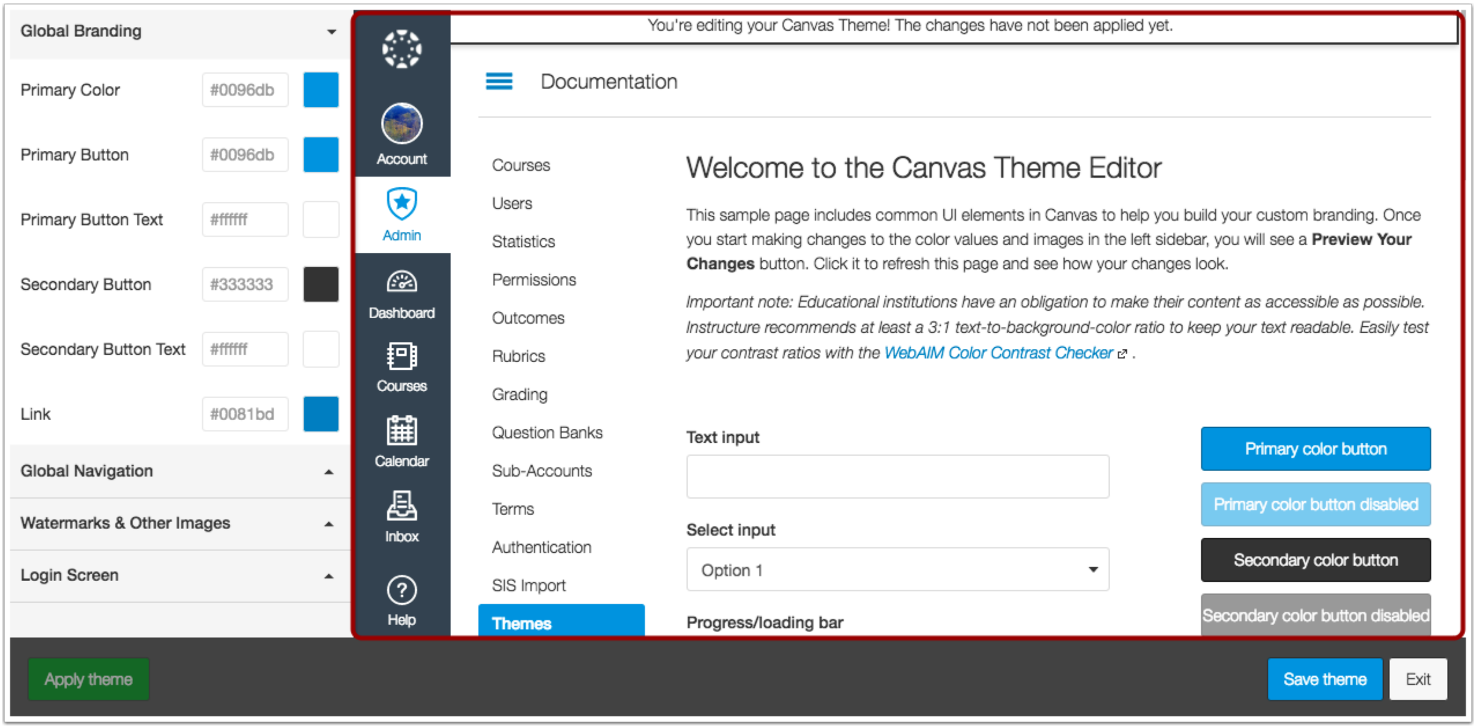
Open Saved Theme



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].

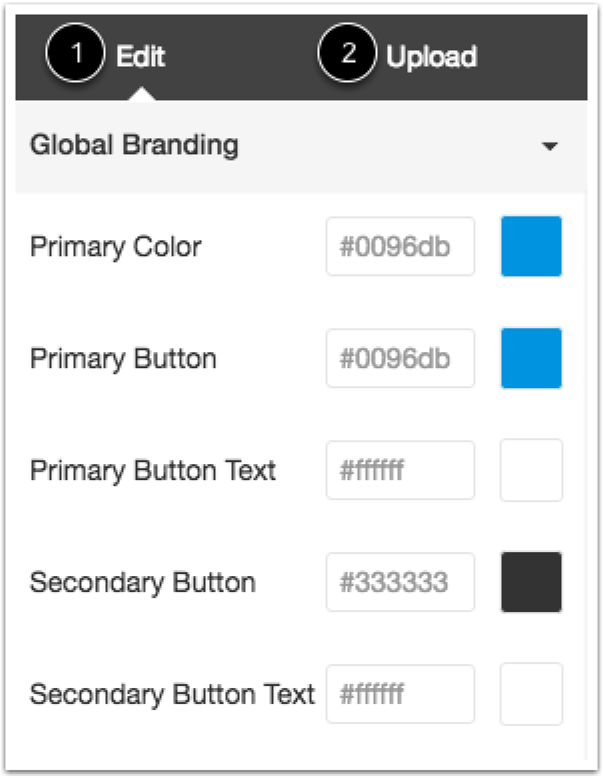
To create a new theme based on a saved theme, click the **Add Theme** button [2] and select the name of the saved theme from the list. This option helps you avoid overwriting your previously saved theme.

View Theme Editor



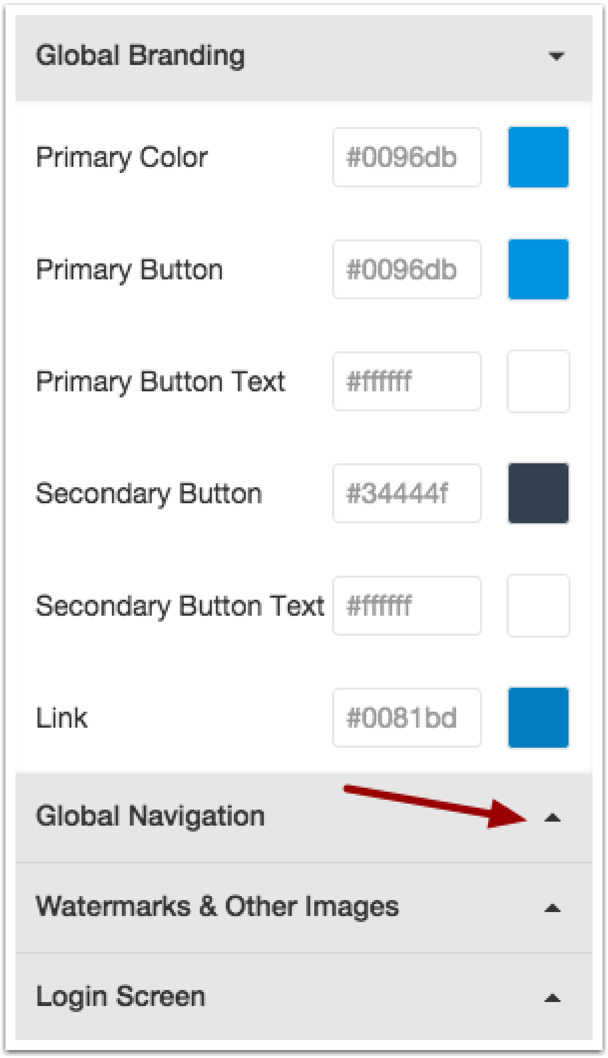
The Theme Editor displays a sample page to preview your custom branding. These components will change with the colors and branding that you add using the Theme Editor.

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. Learn more about uploading custom CSS/JavaScript files.

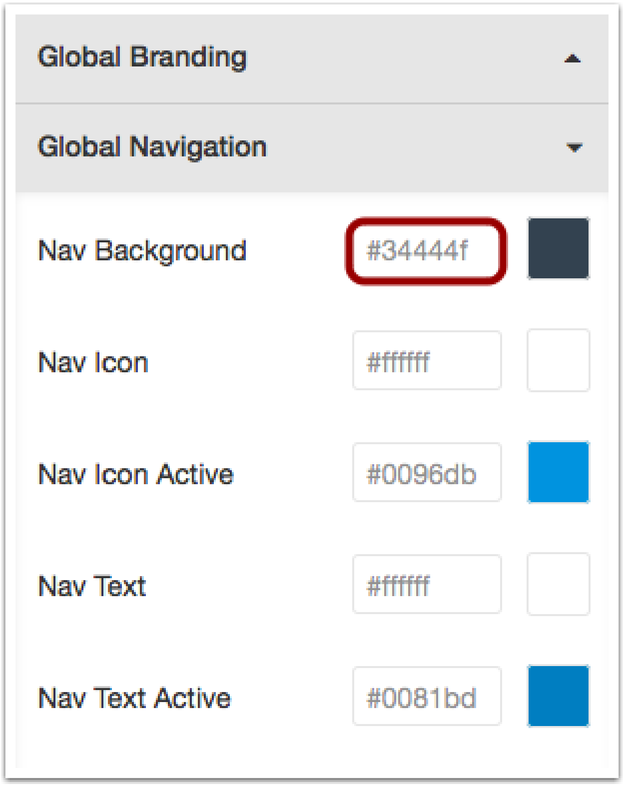
Locate Components



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

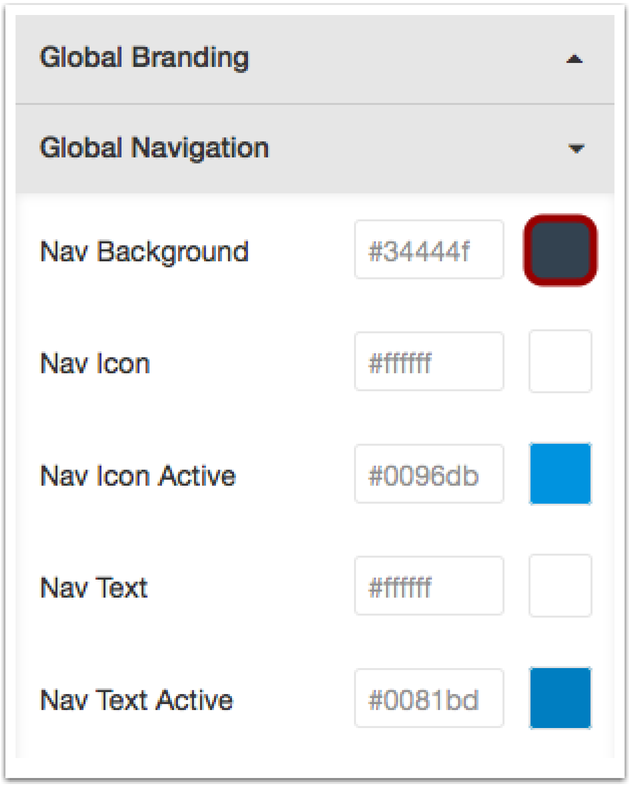


The default value for each component is faded in the text field.

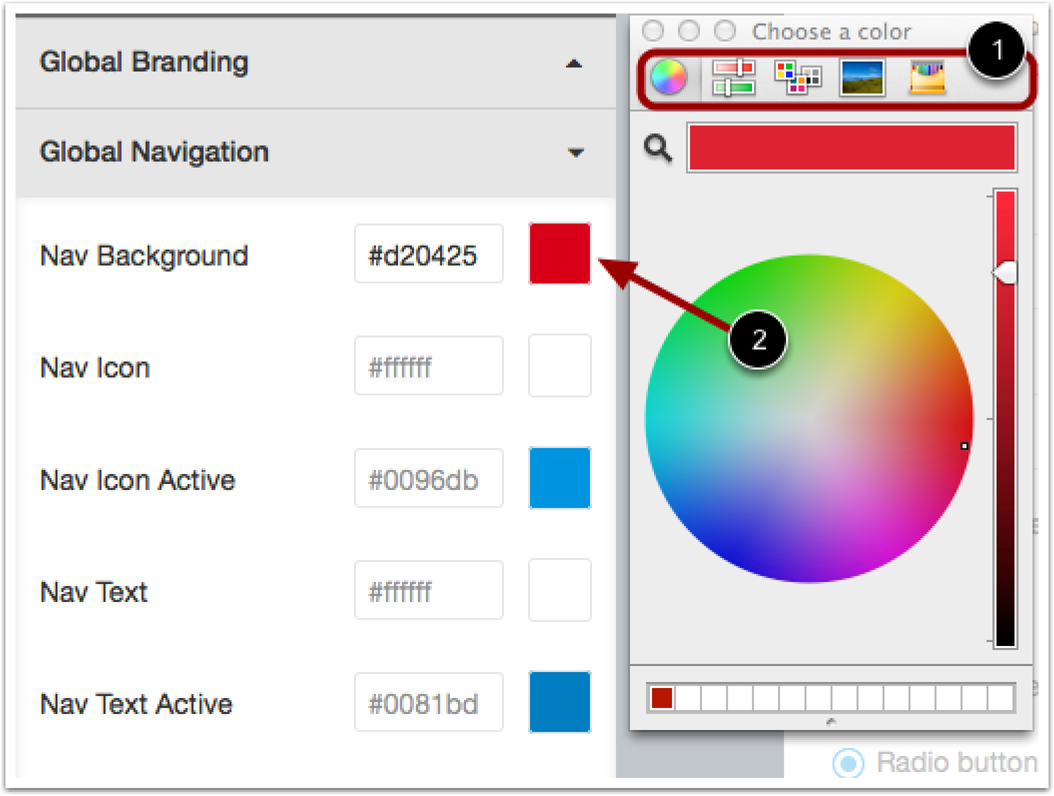
To specify a color component, locate the component text field and enter a new CSS color. You can enter colors via hex code, RGB value, or valid color name.

Note: Entered colors will convert and display as hex codes.

Select Color via Color Selector

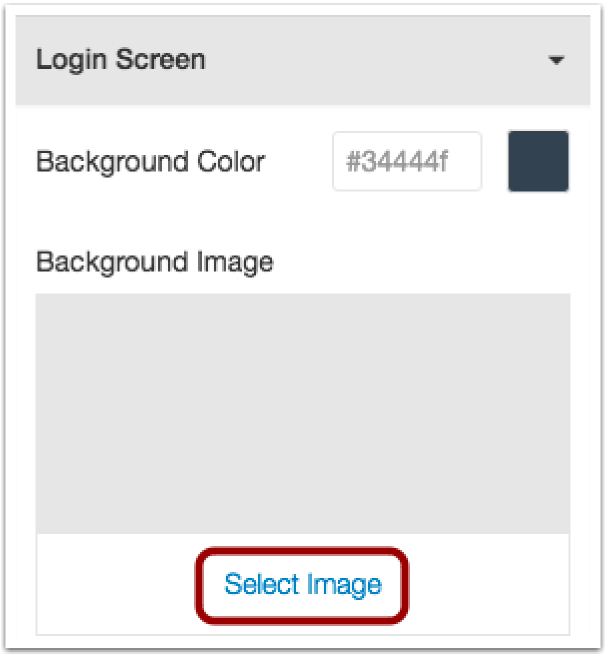


In browsers that support native color inputs, the color selector can be used to choose a value. Locate the component and click the color box. The color selector will appear in a new window.



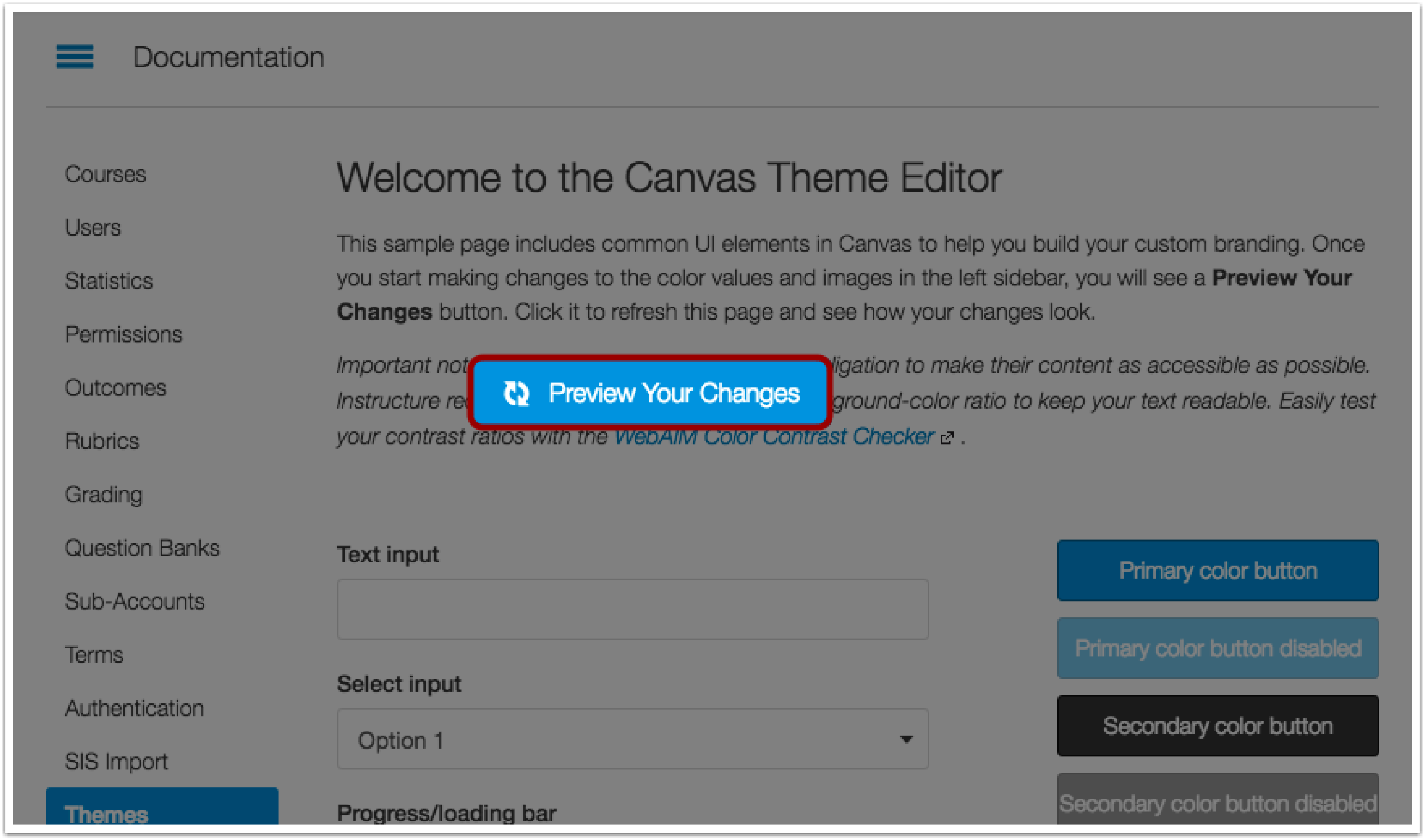
The color selector window defaults to the color wheel, but you can use any of the color tab options to locate a color [1]. Once a color is selected, the component will display the new color in the box [2]. The component's hex color will also update with the new color value.

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



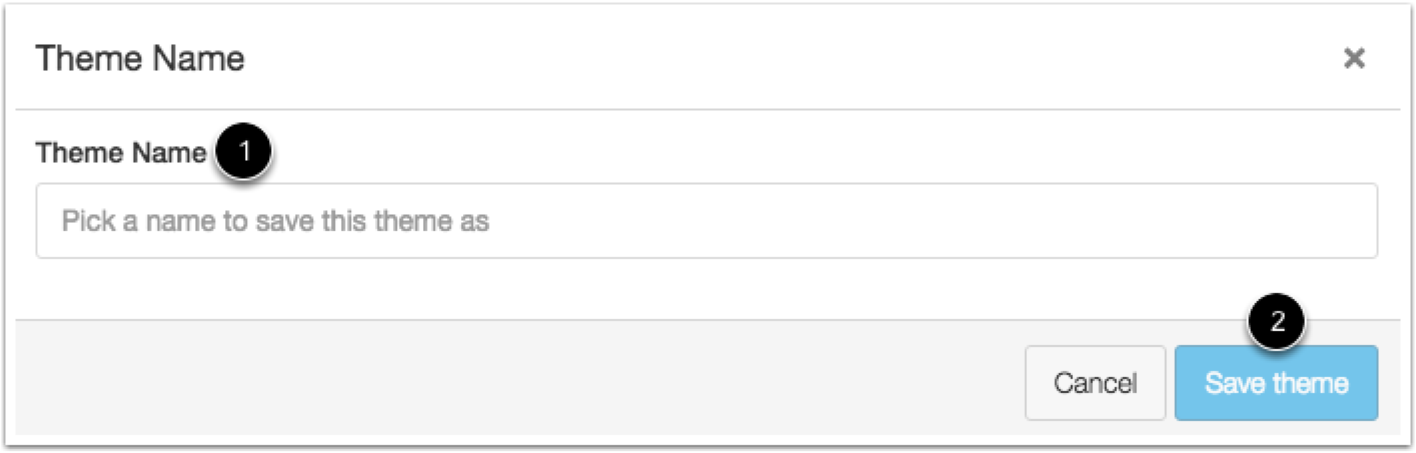
To preview your theme, click the **Preview Your Changes** button.

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].

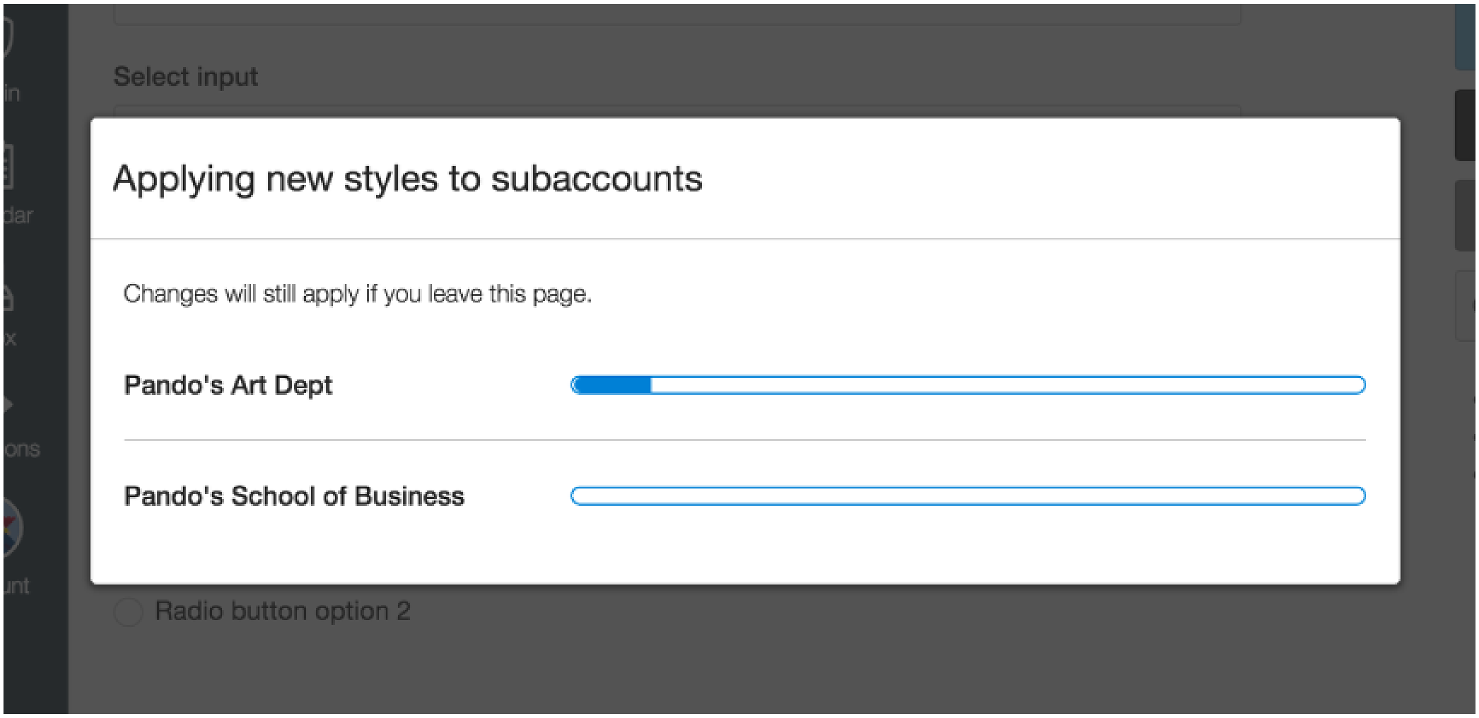
Note: If you edited a previously saved theme, saving the theme overwrites the previous version of the theme and uses the same theme name.

Apply Theme

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

To exit the theme and 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.

View Sub-Account Theme Updates



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.

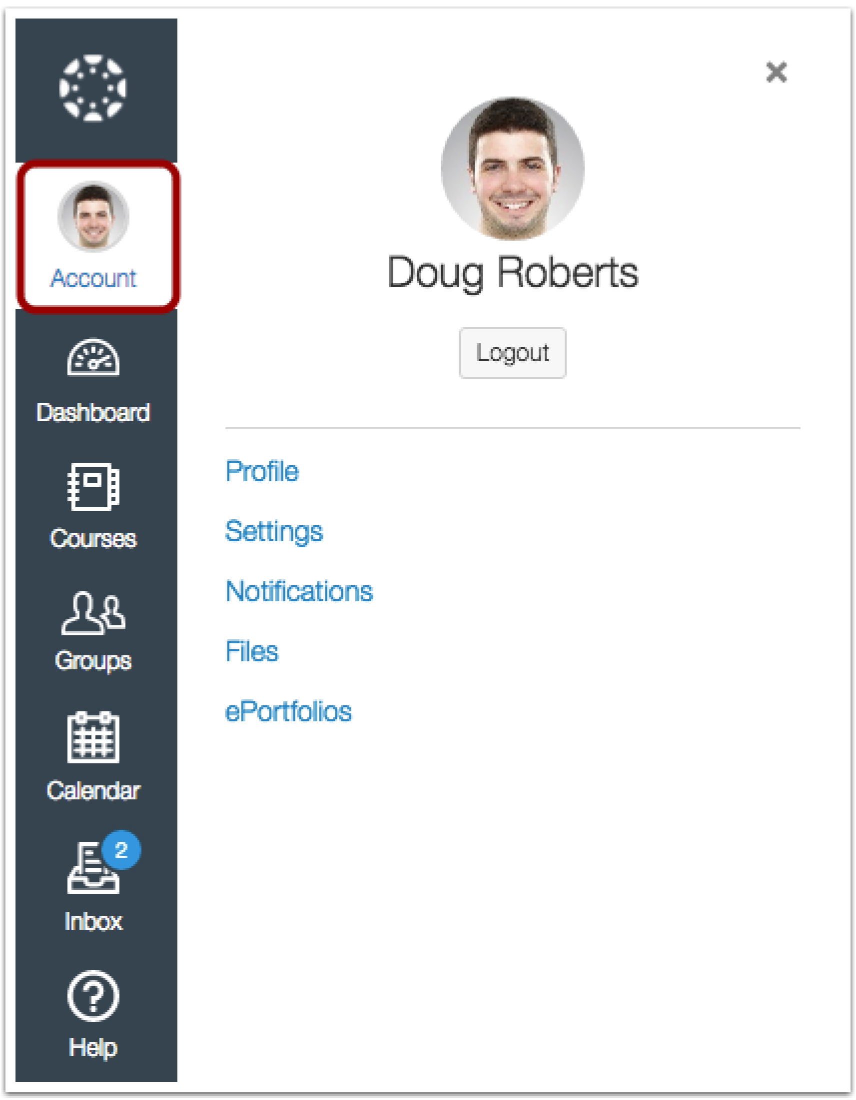
How do I use the Global Navigation Menu?

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. These links provide access to all your courses collectively. Default links include the Dashboard, Courses, Groups, Calendar, Inbox, User Account, and the Help menu.

Depending on your user role and institution account settings, other links may appear in the Global Navigation Menu.

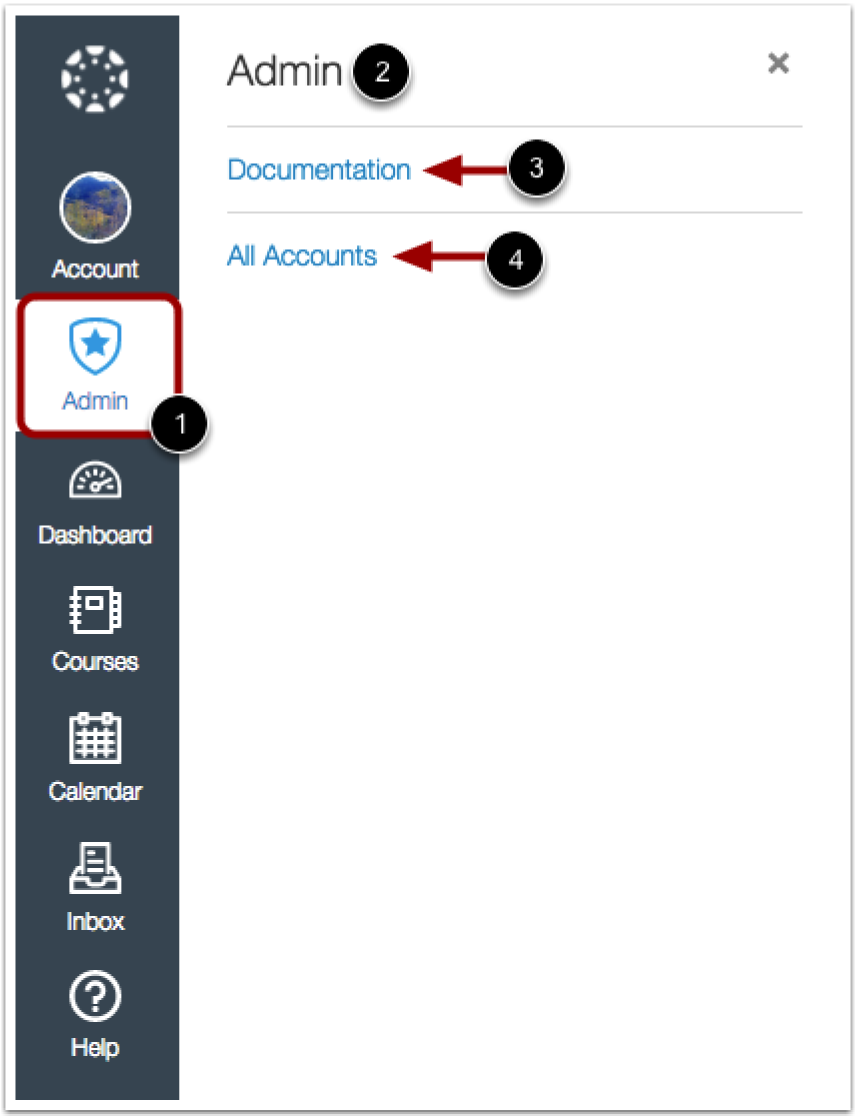
Note: The Global Navigation Menu is responsive for smaller screens. When the browser window size is reduced to a tablet width or smaller, the Global Navigation Menu narrows and the icon menu names are hidden.

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 ePorfolios. You can also use the Account link to log out of Canvas. Learn more about profile and user settings,

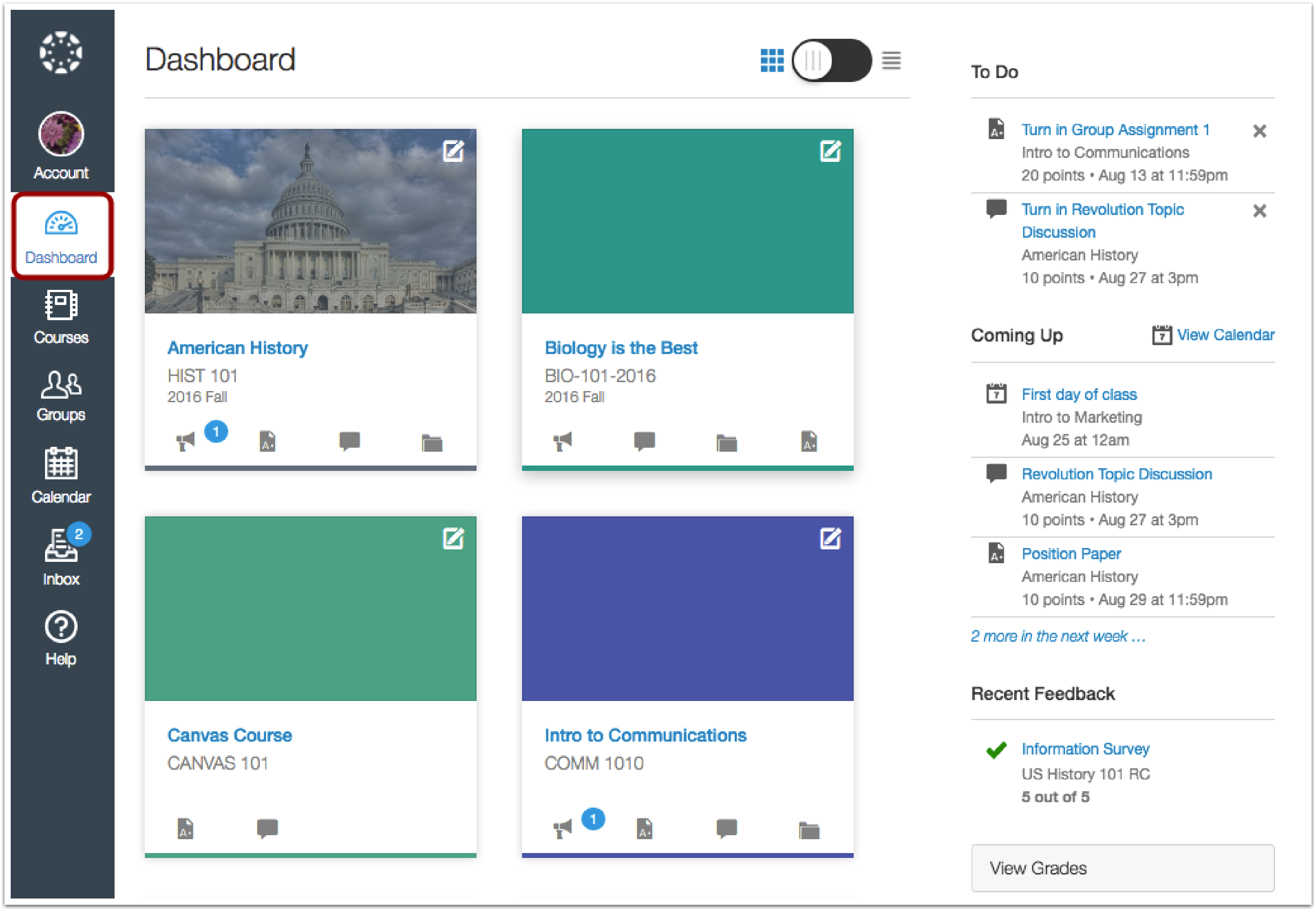
View Admin



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].

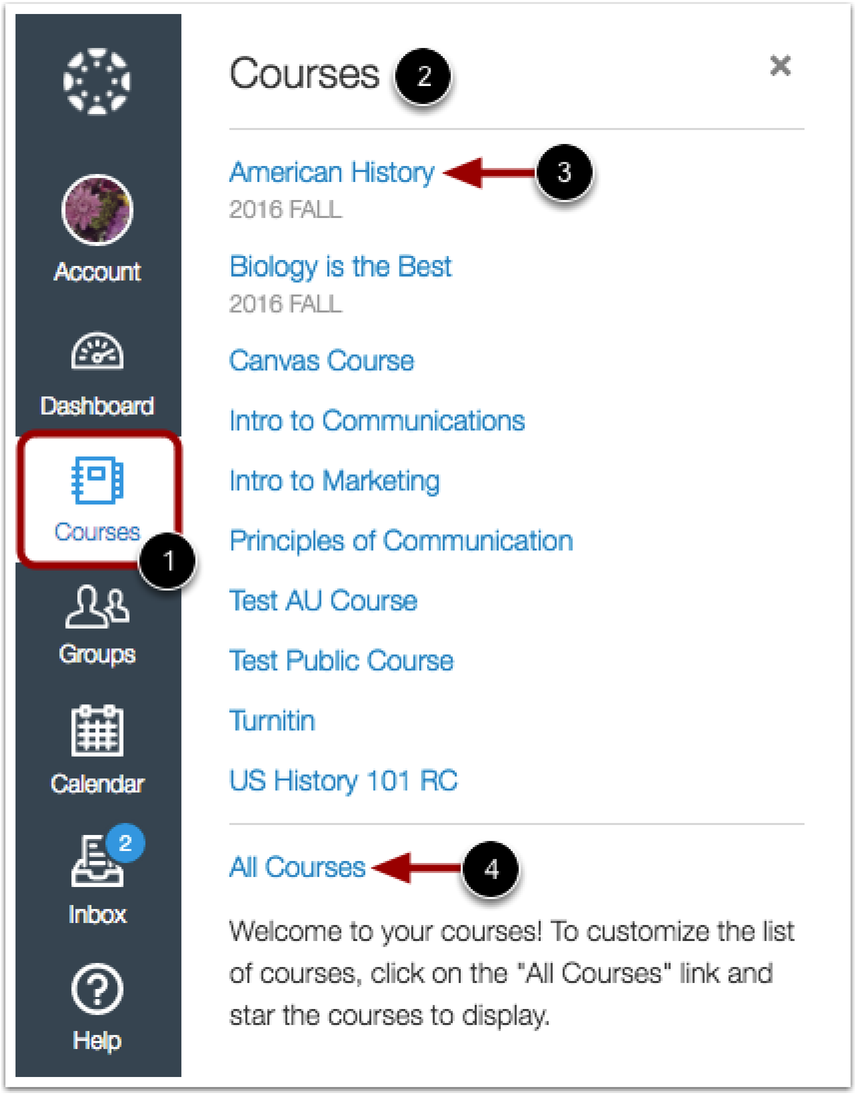
Learn more about accounts and sub-accounts.

View Dashboard



The Dashboard is the landing page after a user logs in to Canvas. The Dashboard can be toggled to a course view or recent activity view and shows notifications for all Canvas courses. Learn more about the Dashboard.

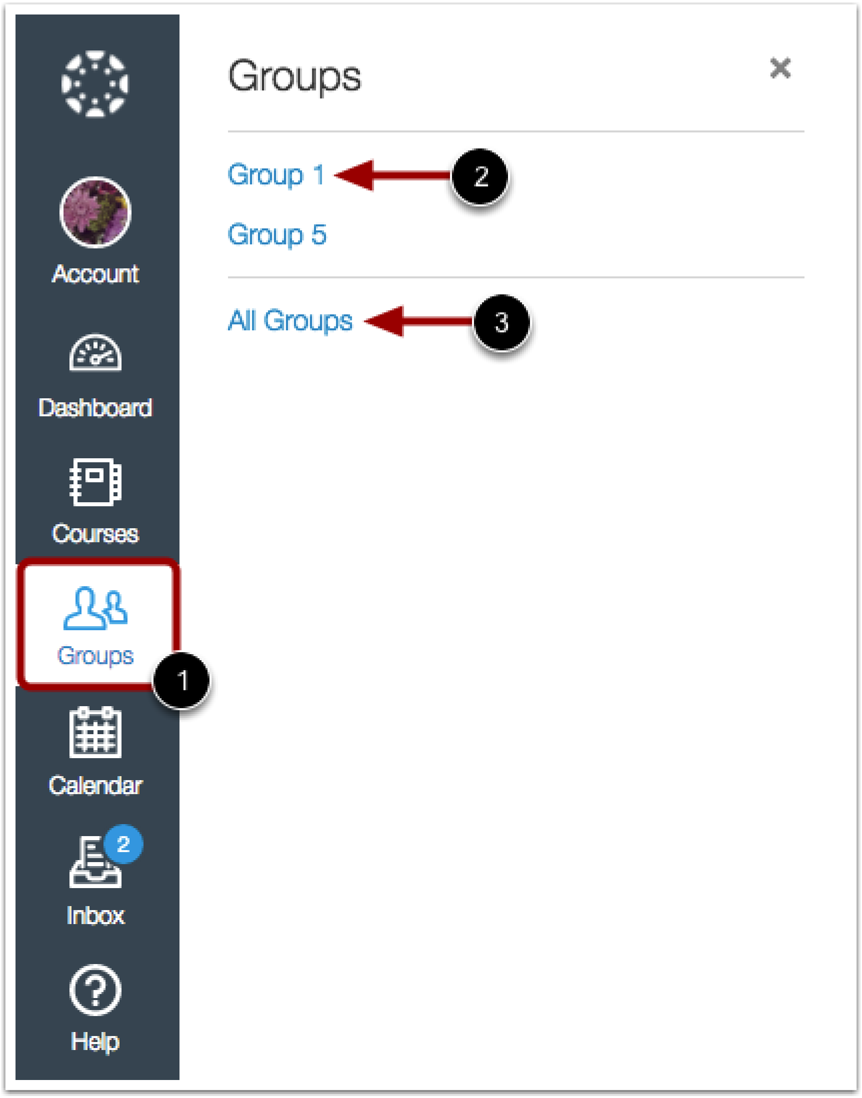
View Courses



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.

To view a course, click the name of the course [3]. To customize your courses list or view all your Canvas courses, click the **All Courses** link [4].

View Groups

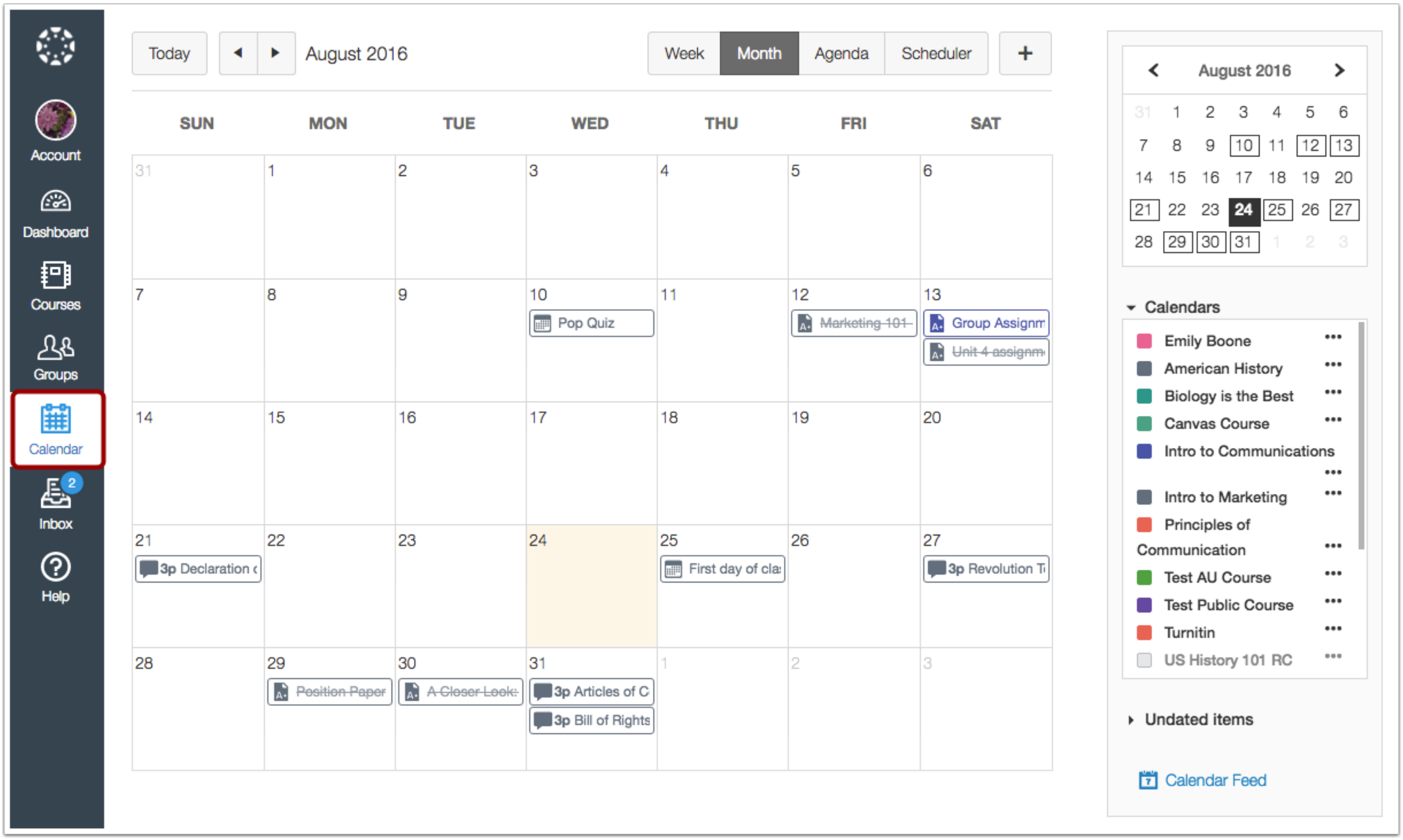


If you are enrolled in Groups, view your groups in the **Groups** link [1]. A menu will expand and display all groups where you are enrolled.

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.

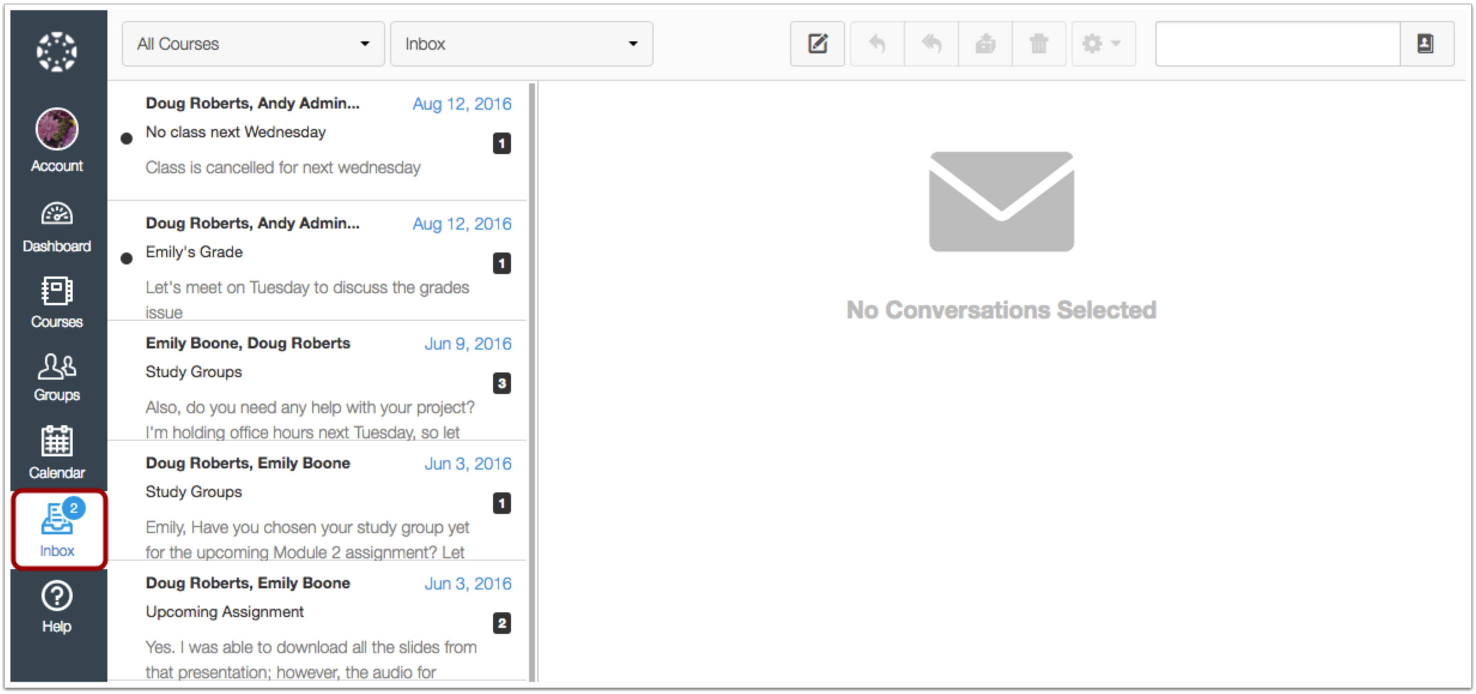
View Calendar



To view your Calendar, click the **Calendar** link.

Learn more about the calendar.

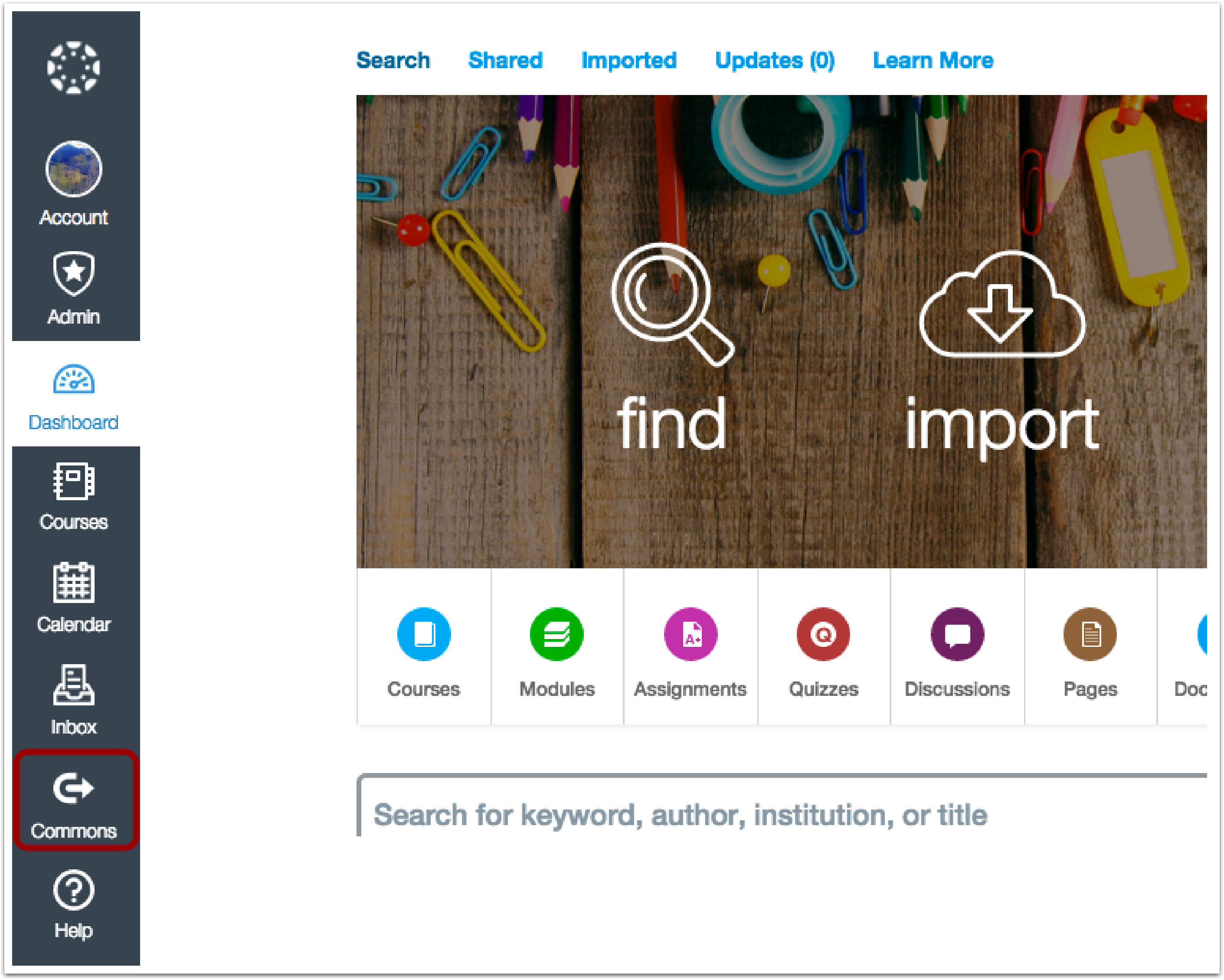
View Inbox



To view your Conversations Inbox, click the **Inbox** link. Conversations is the Canvas messaging system where you can communicate with other users in your courses. The number of new messages are shown as part of the Inbox icon.

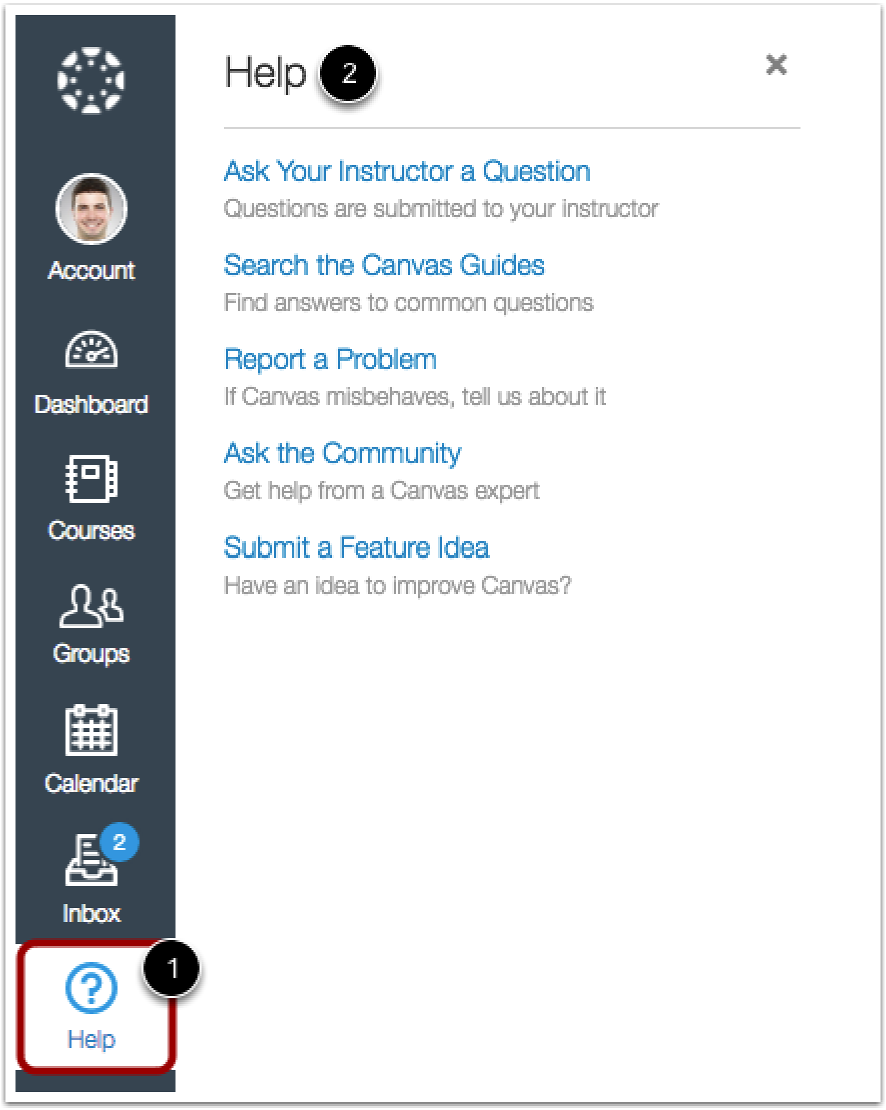
Learn more about Conversations.

View Commons



If you are an instructor and your institution is participating in Canvas Commons, you can access Commons with the **Commons** link. Learn more about Canvas Commons.

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. Learn more about the Help menu.

Note: Depending on your user role and institution settings, the Help menu may display different options.

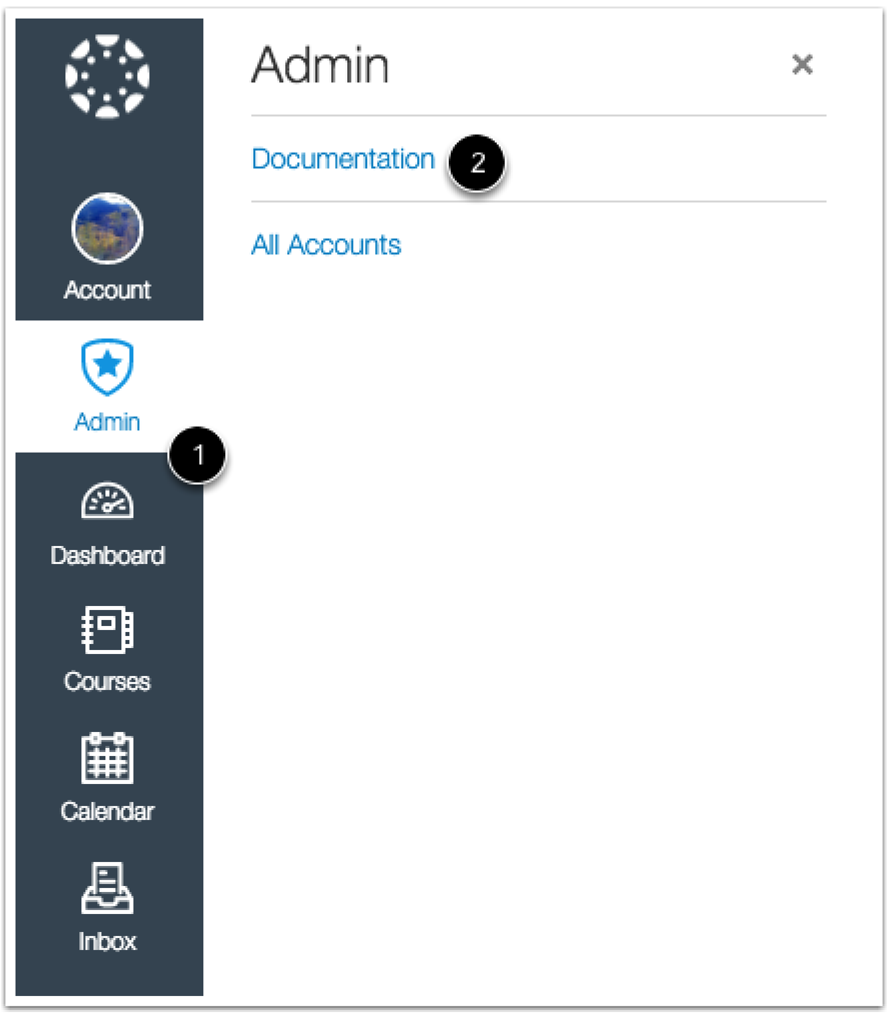
Admin Tools

How do I see which notifications have been sent to a user in an account?

You can verify whether a user is receiving the appropriate notifications using the View Notifications admin tool.

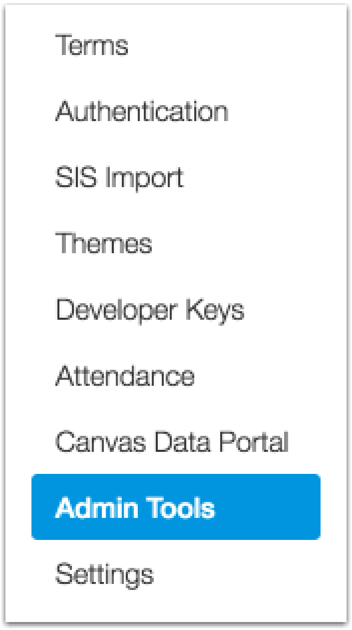
Note: You must talk to your Customer Success Manager to enable this feature before you can use it. After your Customer Success Manager enables the feature, you should enable the **View Notifications** permission for the appropriate roles.

Open Account



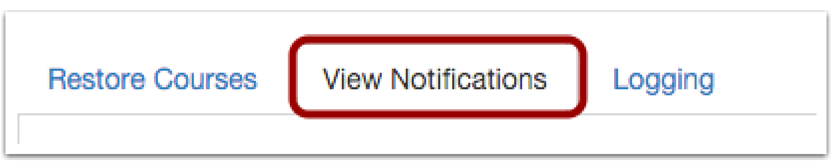
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Admin Tools



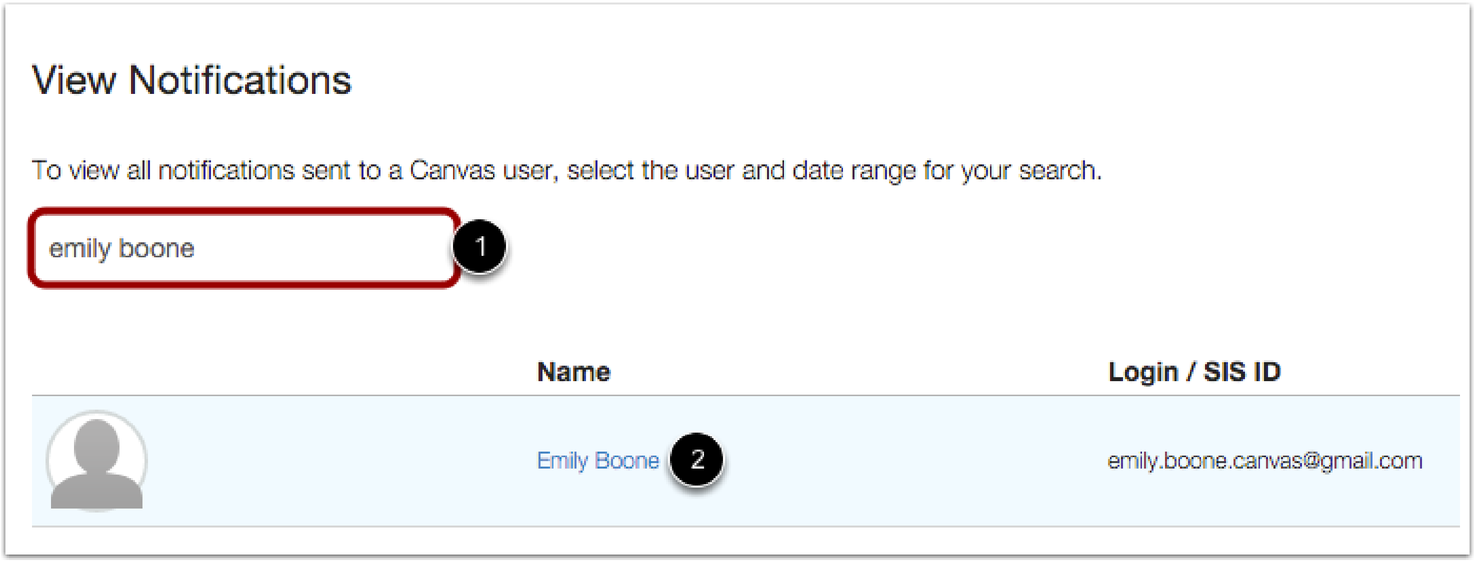
In Account Navigation, click the **Admin Tools** link.

Open View Notifications



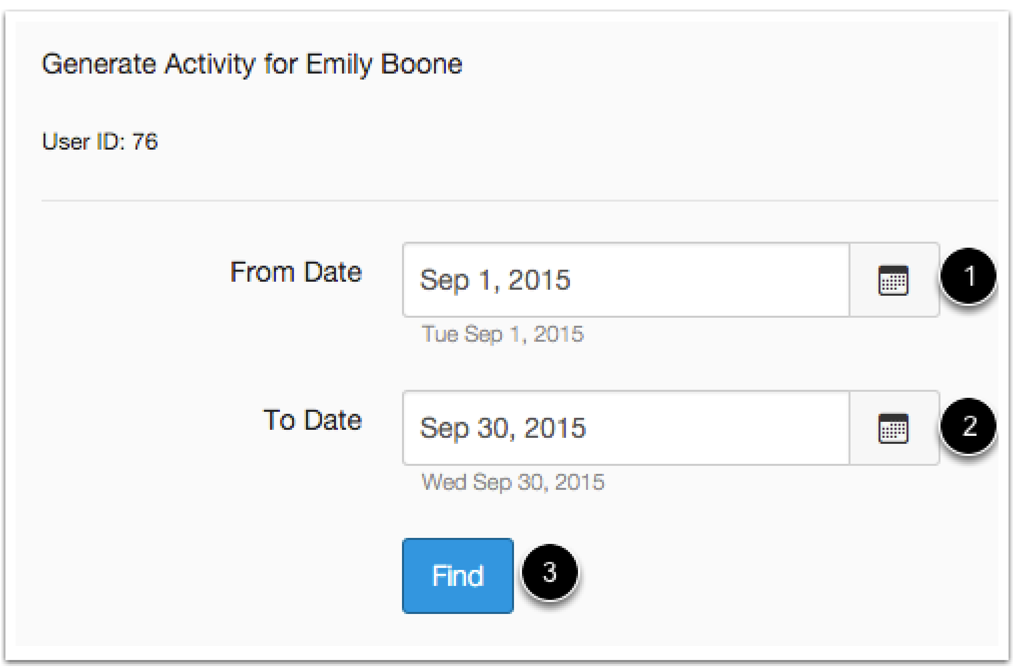
Click the **View Notifications** tab.

Search for Student



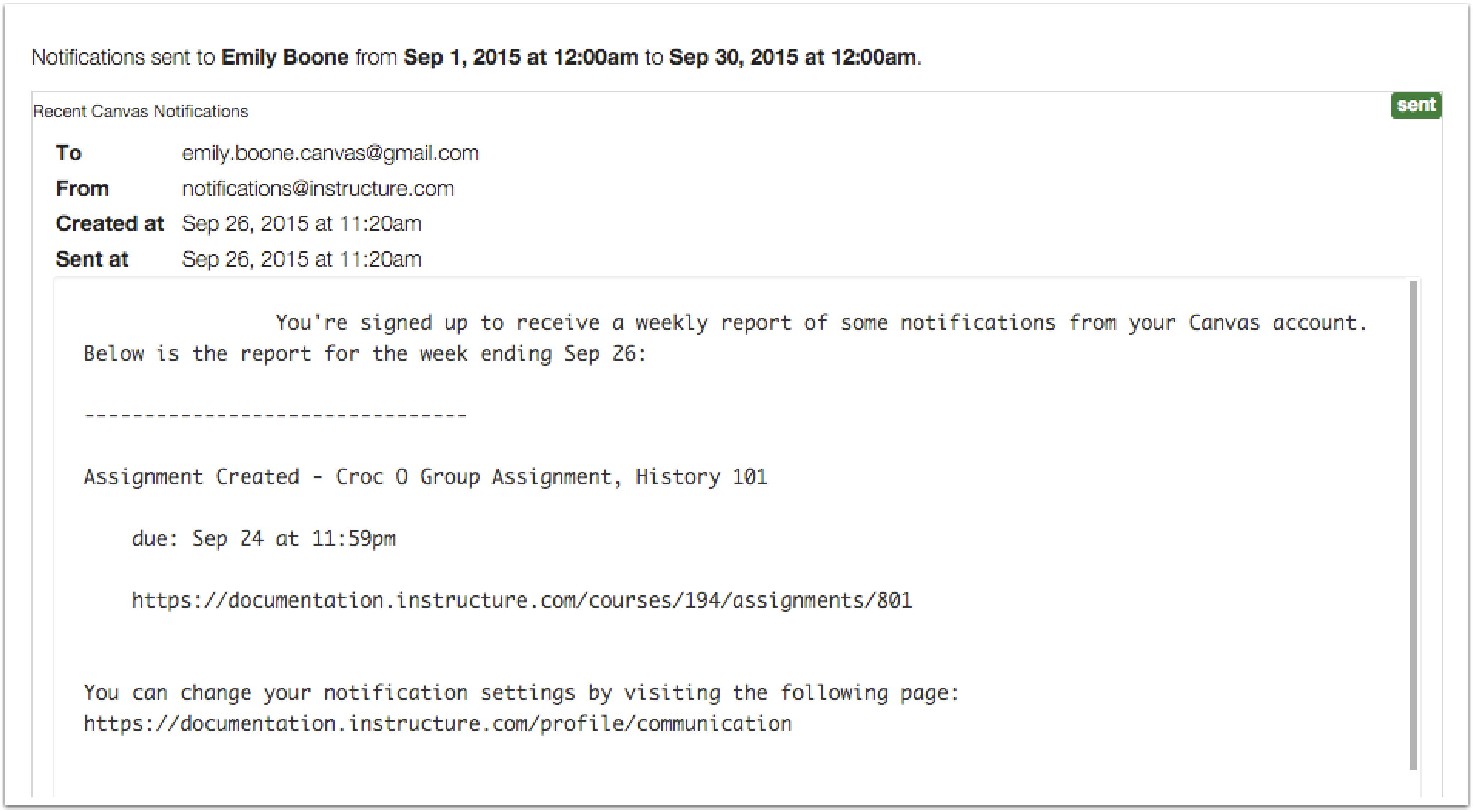
In the search field [1], type the name of the student. Click the student's name [2] to select a date range for your search.

Enter Date Range



Create the date range you want to search in. Using the calendar icon, select a From Date [1] and a To Date [2]. To view the notifications for the user, click the **Find** button [3].

View Notifications Sent to User



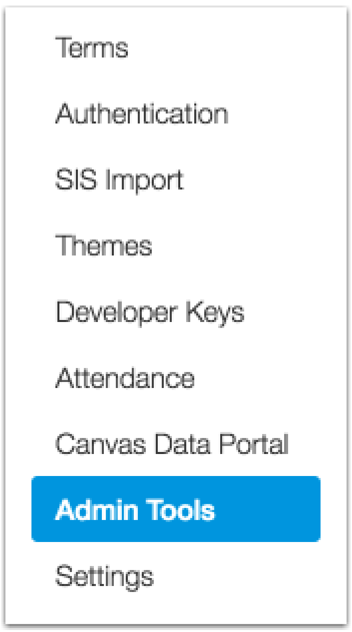
View the notifications sent to the user from Canvas.

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.

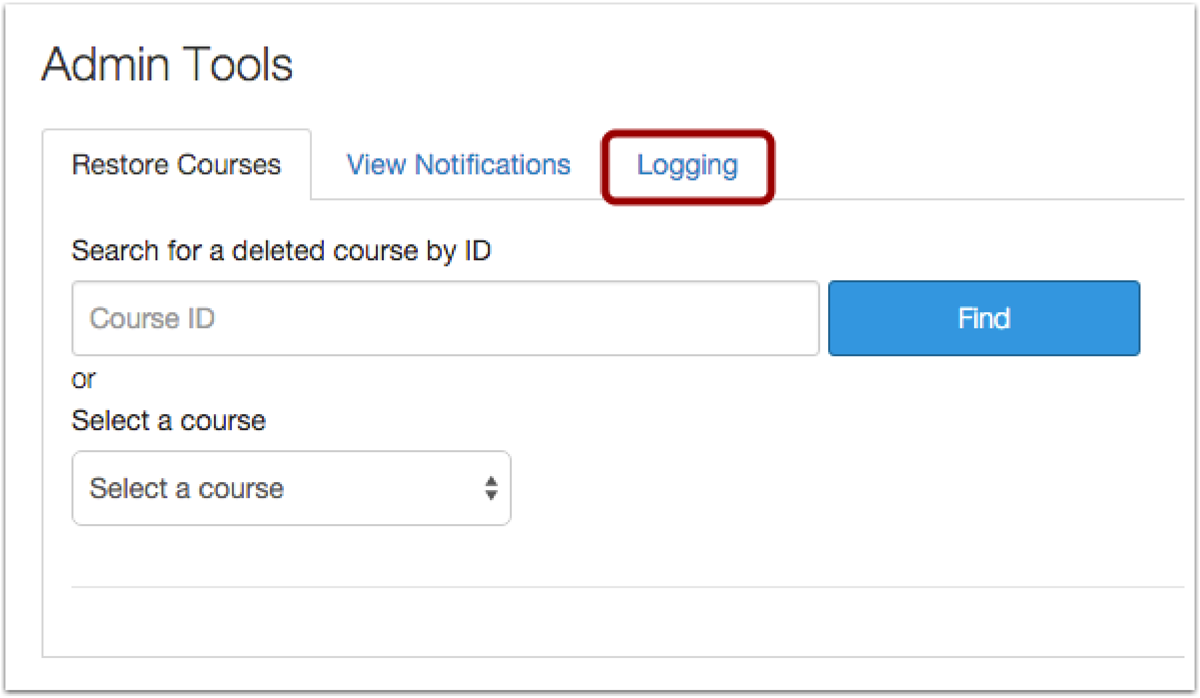
Note: Canvas will only register a user's logout when the **Logout** button is clicked in the User Account menu. Closing the browser window does not create a logout request.

Open Admin Tools



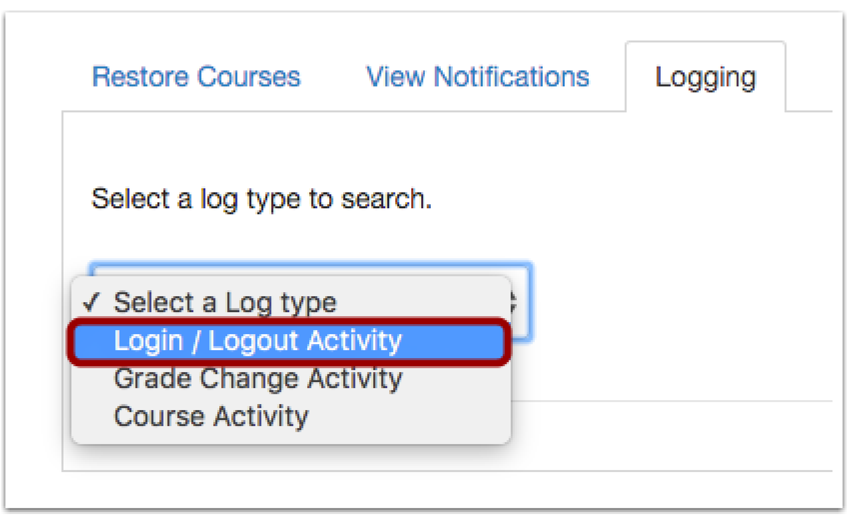
In Account Navigation, click the **Admin Tools** link.

Open Logging



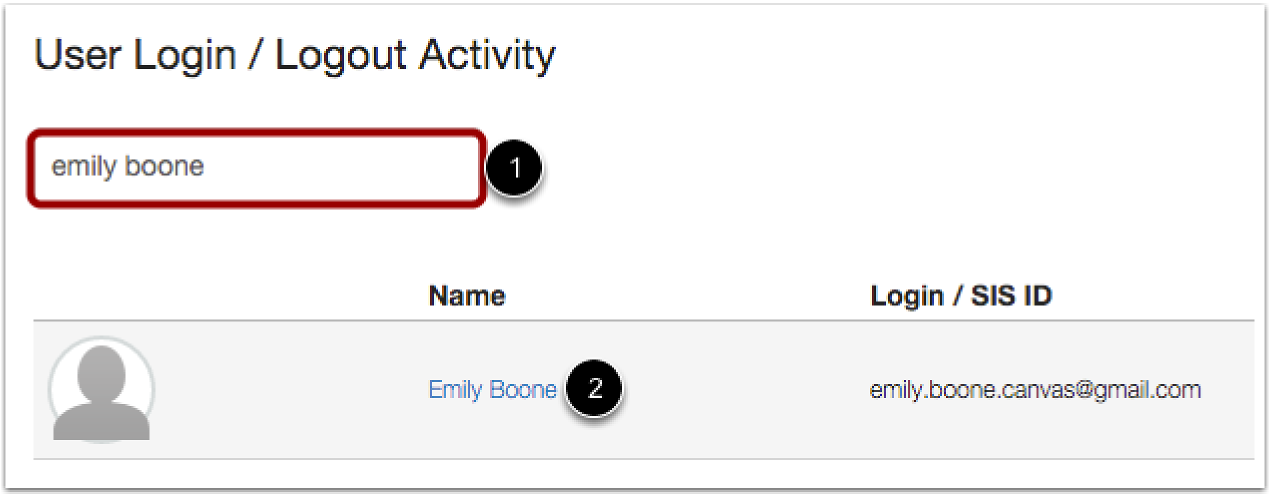
Click the **Logging** tab.

Select Log Type



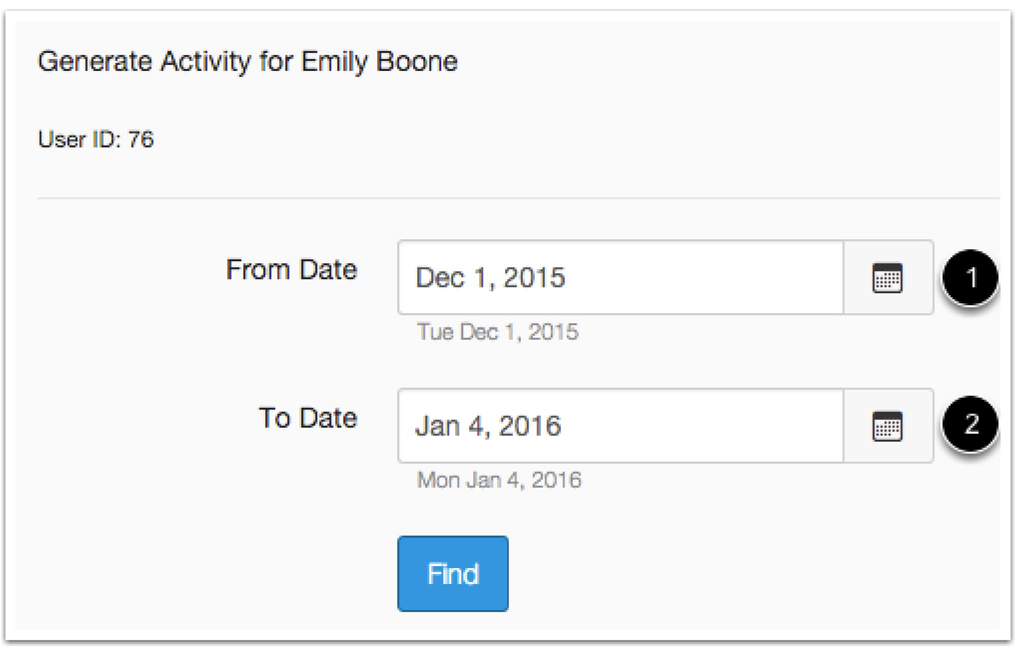
From the log type drop-down menu, select the **Login / Logout Activity** option.

Search for Student



In the search field [1], type the name of the student. Click the student's name [2] to select a date range for your search.

Select Date Range



Create the date range you want to search in. Using the calendar icon, select a From Date [1] and a To Date [2].

Find Logging Activity

Click the **Find** button.

View Logging Activity

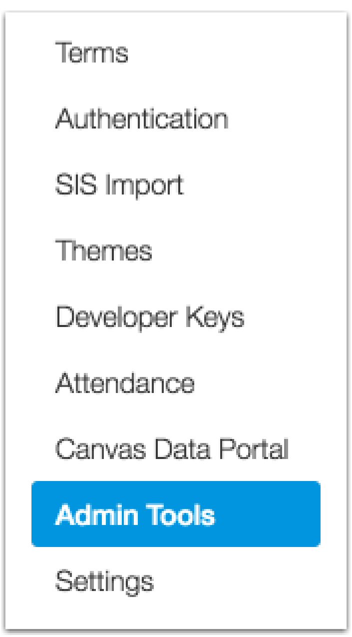
Date	Time	Activity
Jan 4, 2016	12:18pm	LOGIN

View the login/logout activity for the user.

How do I view grade change activity for an account?

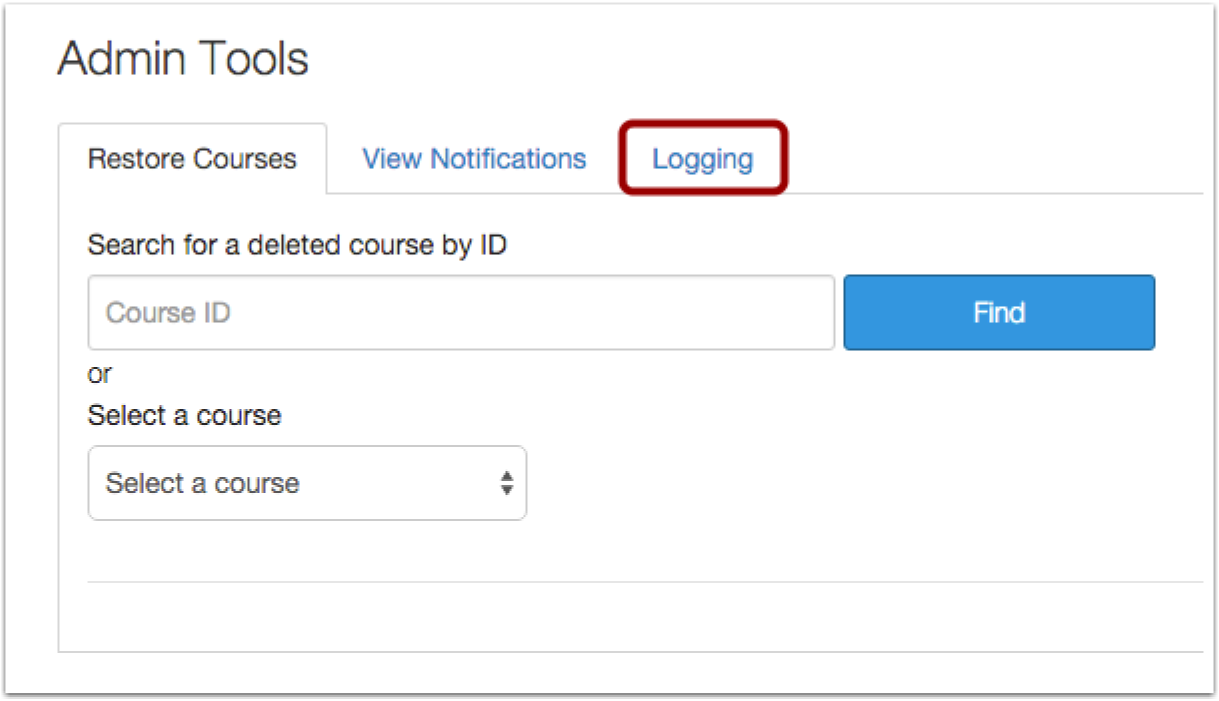
As an admin, you can view grade change activity for your account without having to access the API or grade history page.

Open Admin Tools



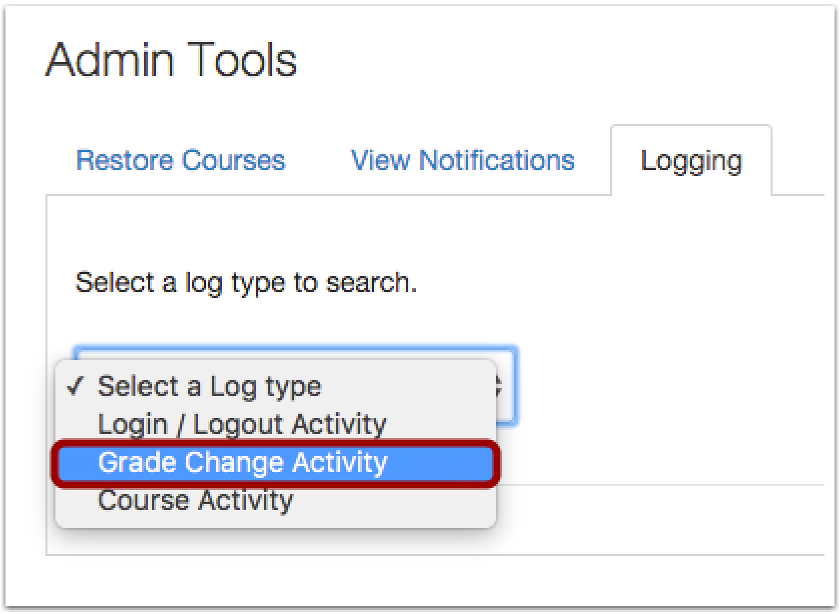
In Account Navigation, click the **Admin Tools** link.

Open Logging



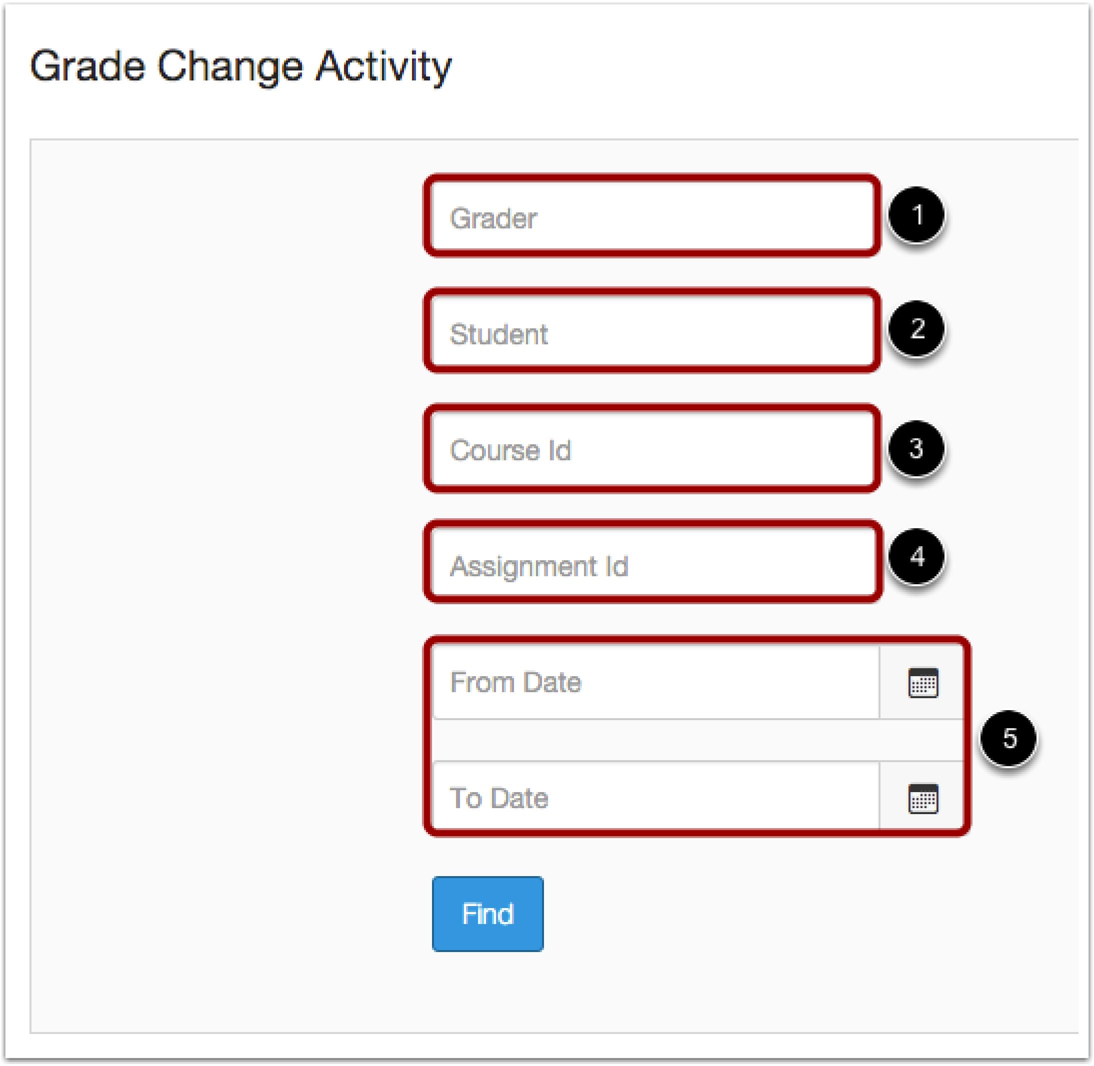
Click the **Logging** tab.

Select Log Type



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

Search for Grade Change

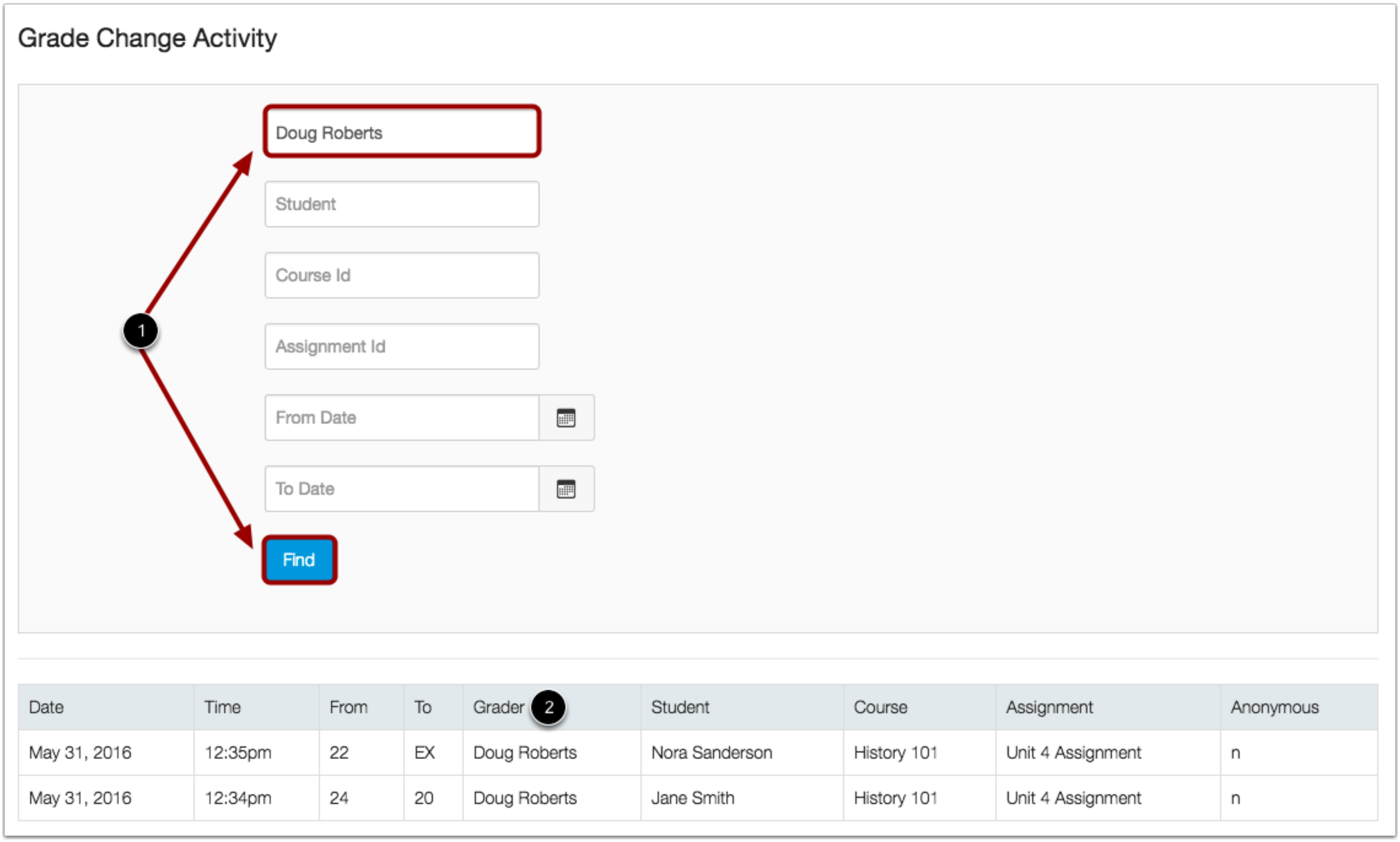


To view grade change activity results, search by choosing between grader, student, course id, or assignment id.

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. This field is **optional**.

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



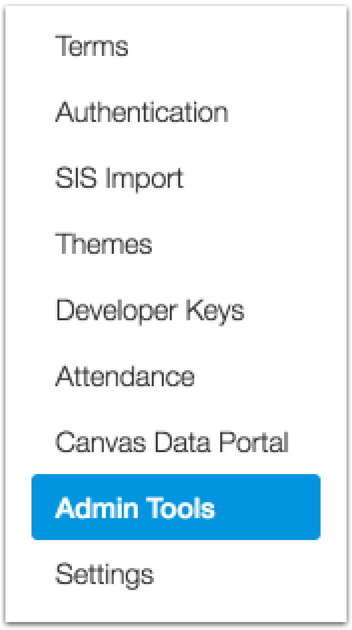
Enter search criteria in the appropriate field and click the **Find** button [1]. Canvas will display any applicable results for the field you selected. In the example above, the search generated all activity based only on the Grader [2]:

- 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?

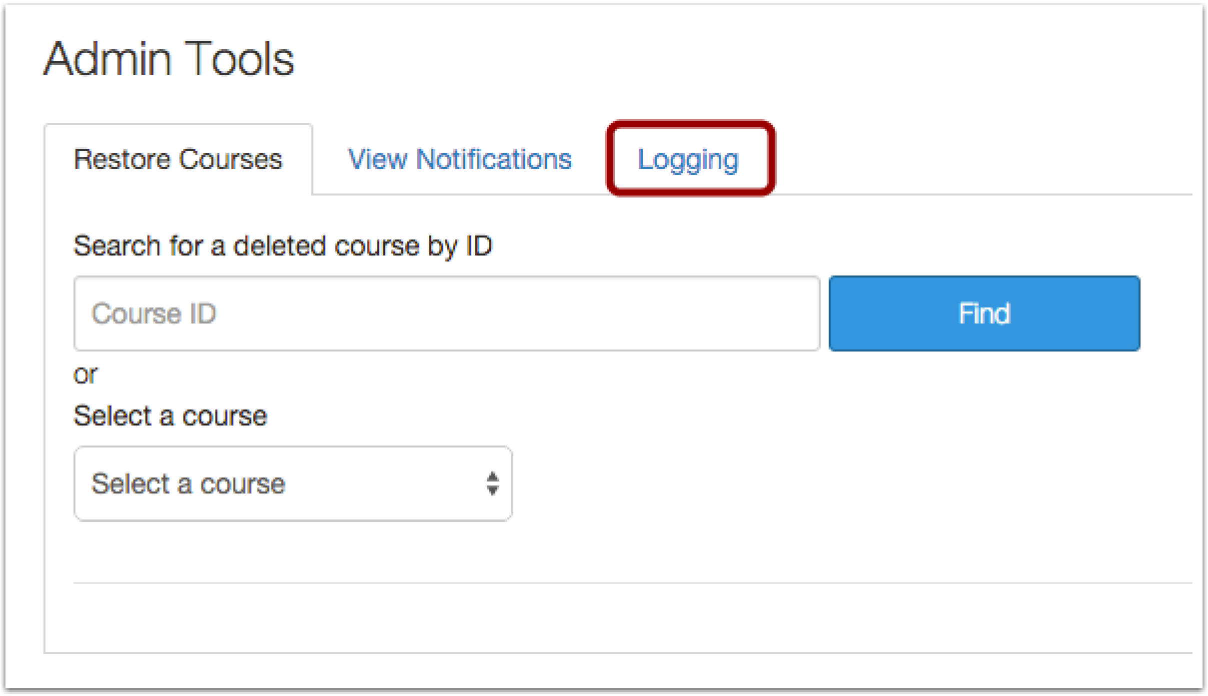
As an admin, you can view information about a course in your account.

Open Admin Tools



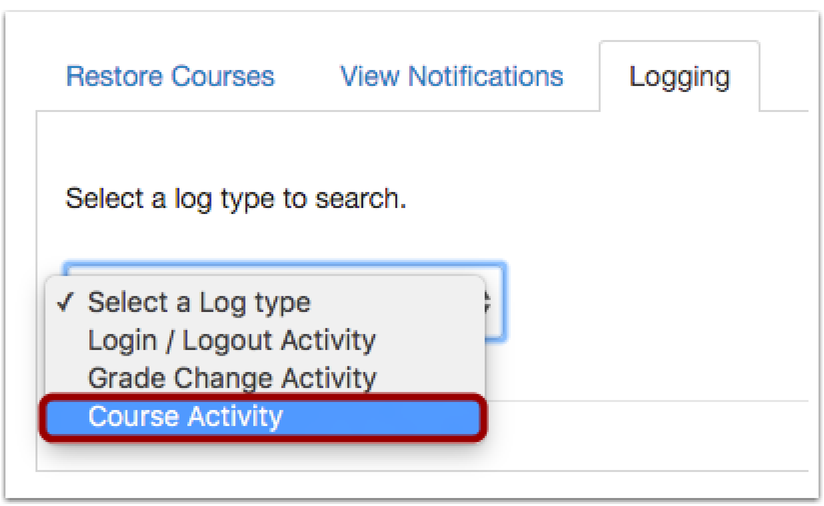
In Account Navigation, click the **Admin Tools** link.

Open Logging



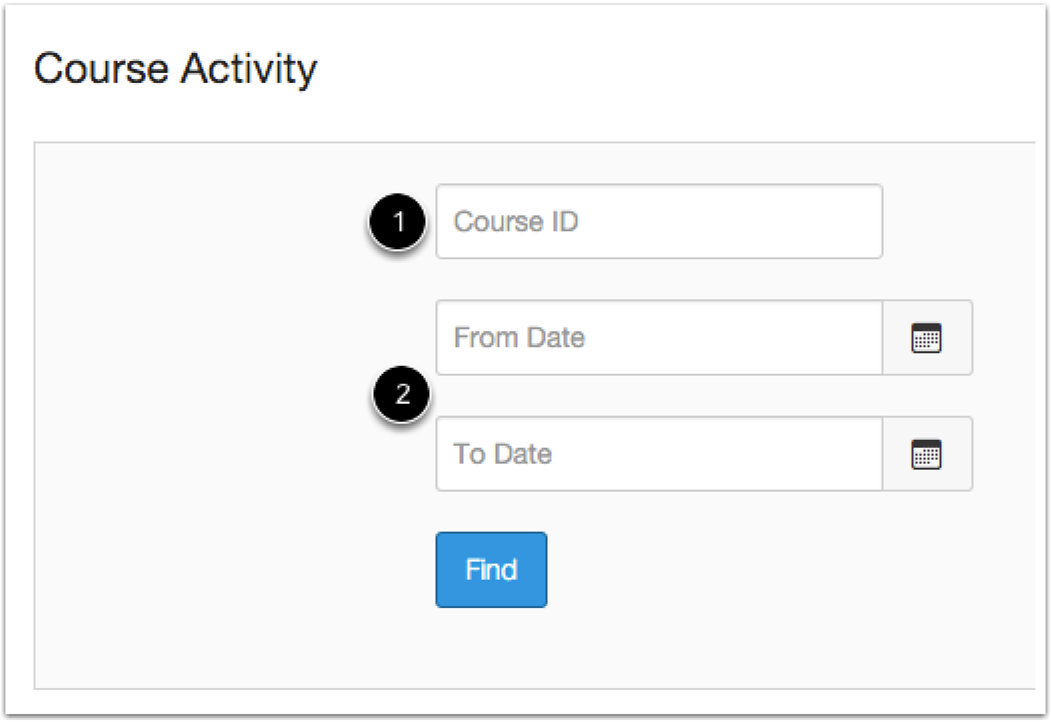
Click the **Logging** tab.

Select Log Type



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

Search by Course Name or Course ID

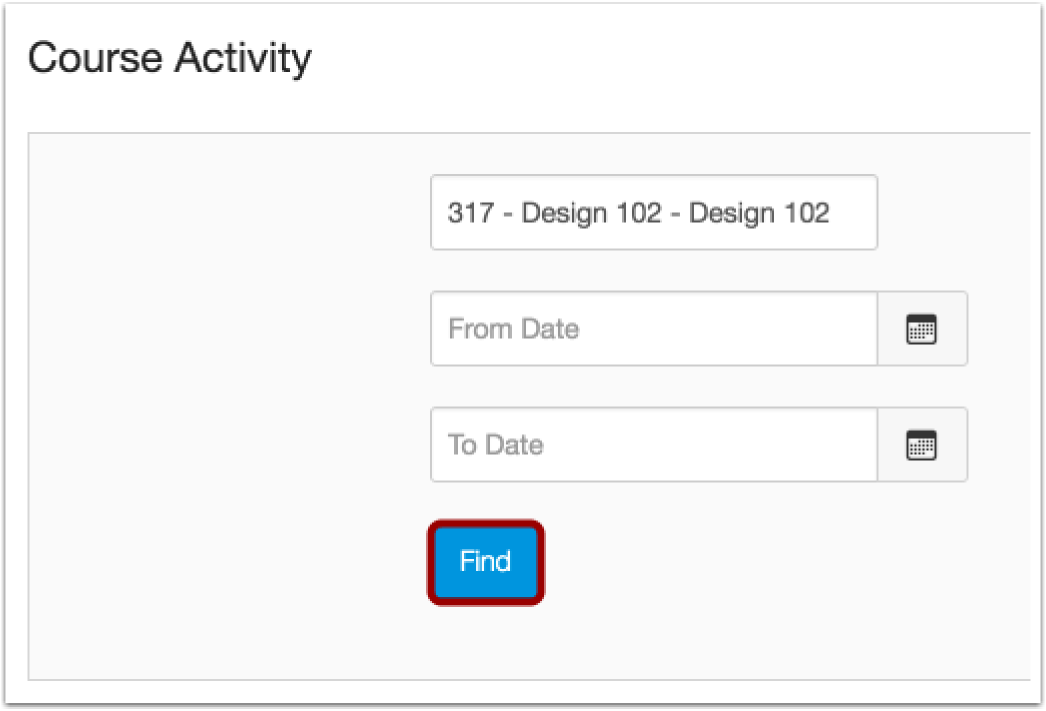


Search by course ID or course name [1]. You can locate your course id number at the end of your course URL (i.e. canvas.instructure.com/courses/XXXXXX).

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



Once you have entered your course information, click the **Find** button.

View Course Activity

Date	Time	User	Type	Source	Event Details
May 31, 2016	1:19pm	Doug Roberts	Unpublished	Manual	View Details
May 31, 2016	1:18pm	Doug Roberts	Published	Manual	View Details
May 31, 2016	1:06pm	Doug Roberts	Updated	Manual	View Details
May 31, 2016	1:00pm	Doug Roberts	Created	Manual	View Details

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, or copied from)
- The **Source** of the activity (manual or via API)
- The **Event Details** of the activity type (click View Details link)

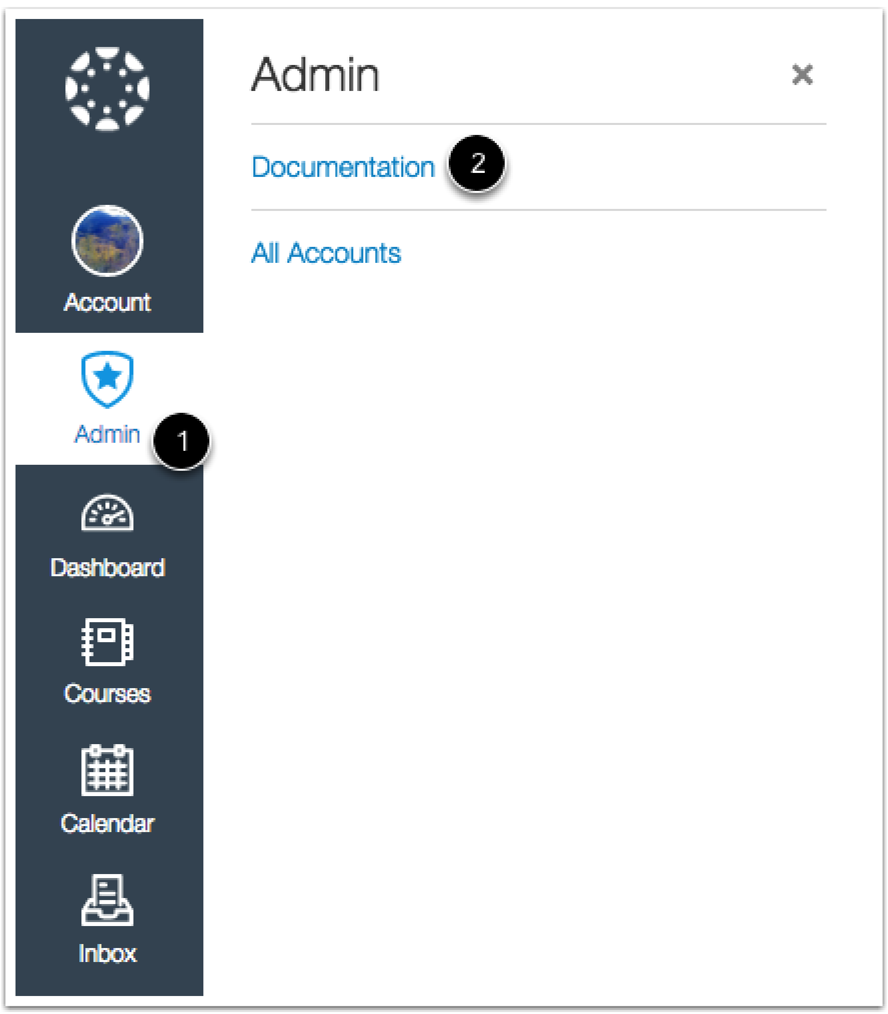
How do I restore a deleted course in an account?

You can restore courses that have been reset or deleted, either by you or by an instructor. 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.

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

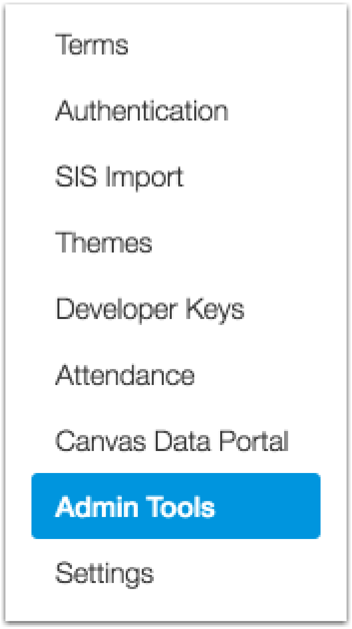
Note: Using an SIS ID will not restore a course unless the course was deleted via SIS.

Open Account



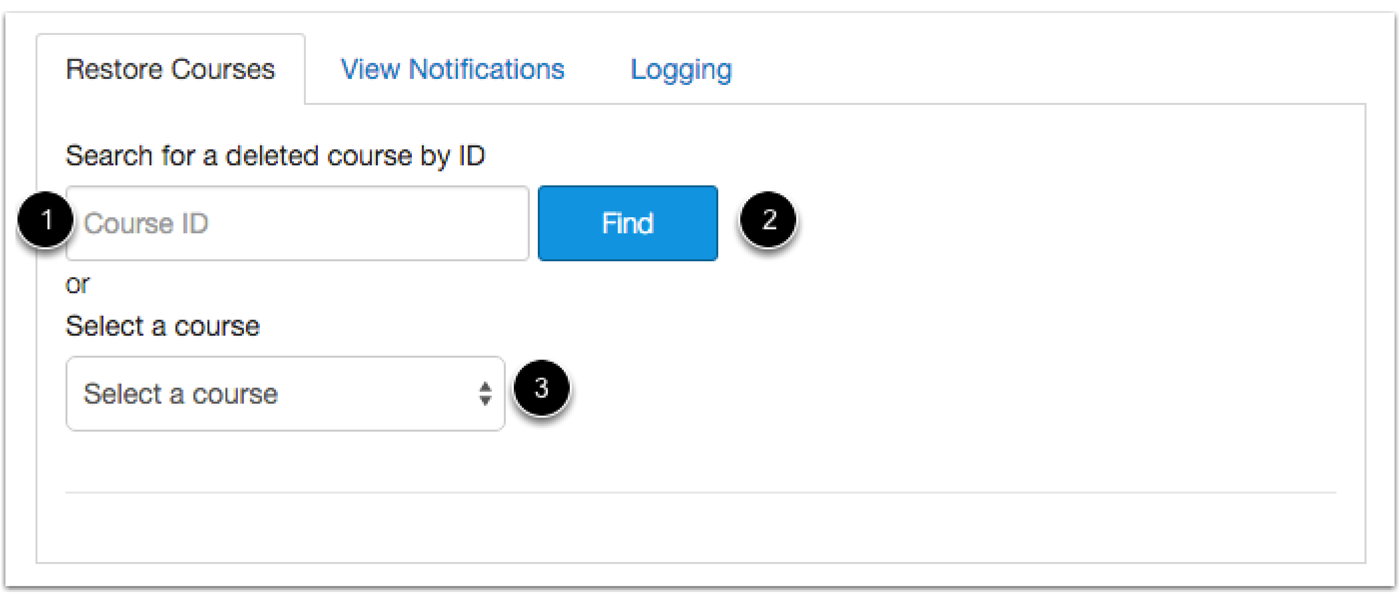
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Admin Tools



Click the **Admin Tools** link.

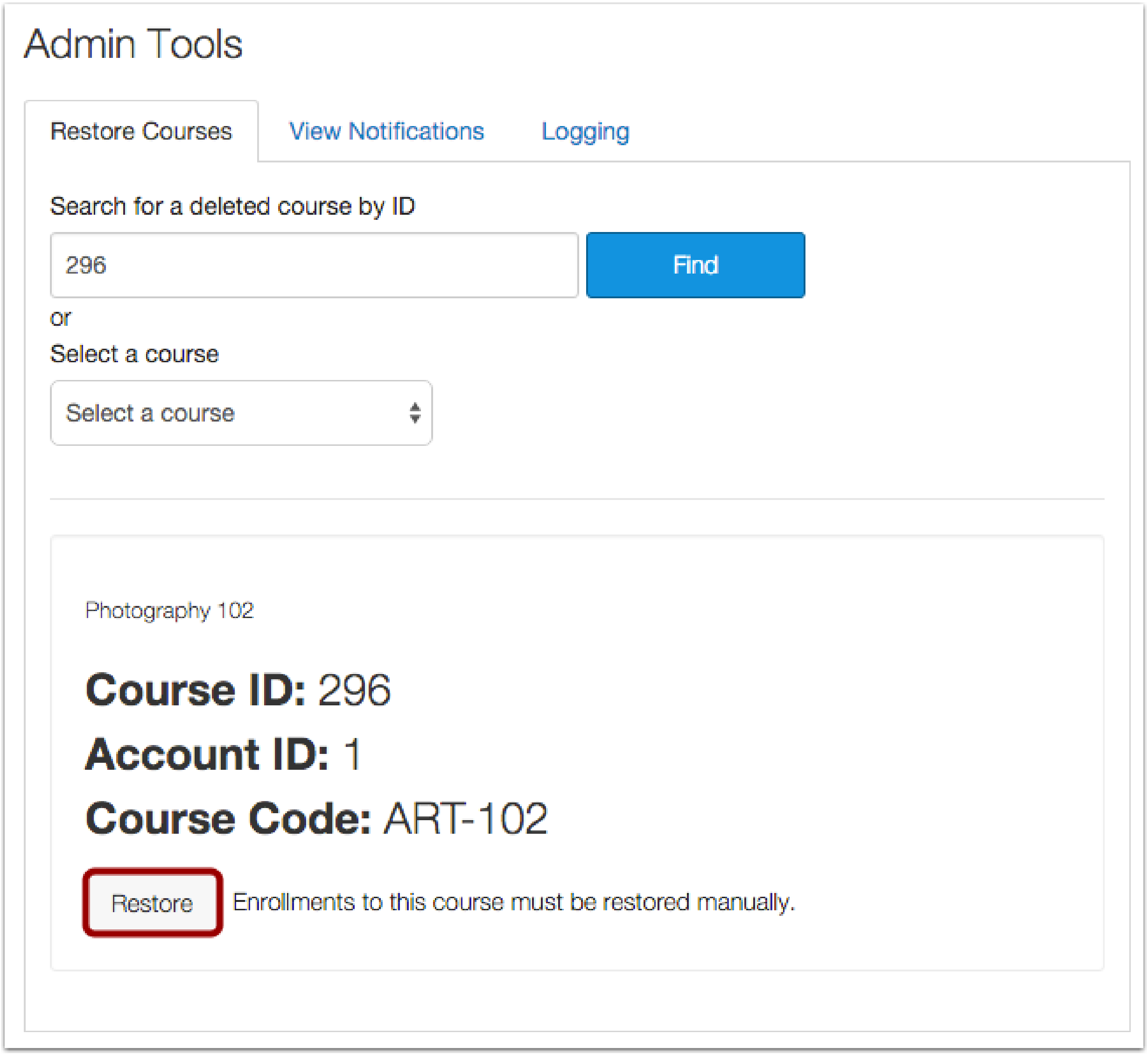
Enter Course ID



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

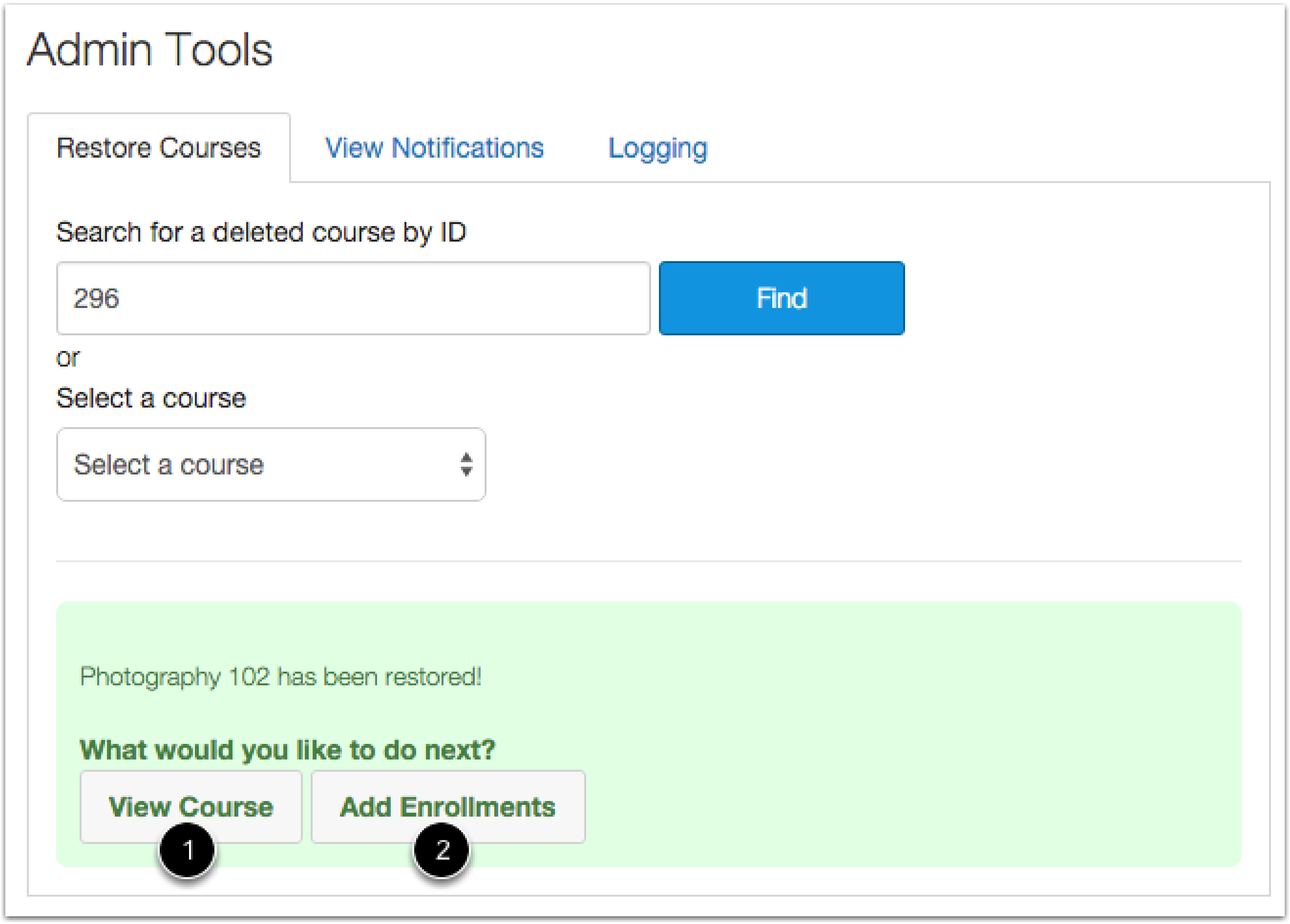
If you have multiple deleted courses, you can use the drop-down menu to select a course [3].

Restore Course



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

Confirm Course Undelete



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

What are Account Analytics?

Analytics evaluate individual components of all the courses in your account and provide an overview of your account's activity.

Analytics takes a three pronged approach to creating substantive data for Canvas users.

- **Justification** focuses on system reports and how the system is being used.
- **Intervention** looks to predict which students will become at-risk students and and how to meet their needs.
- **Learning** focuses on learning outcomes, the effectiveness of the teaching style, and the division of time between students achieving competence and those falling behind.

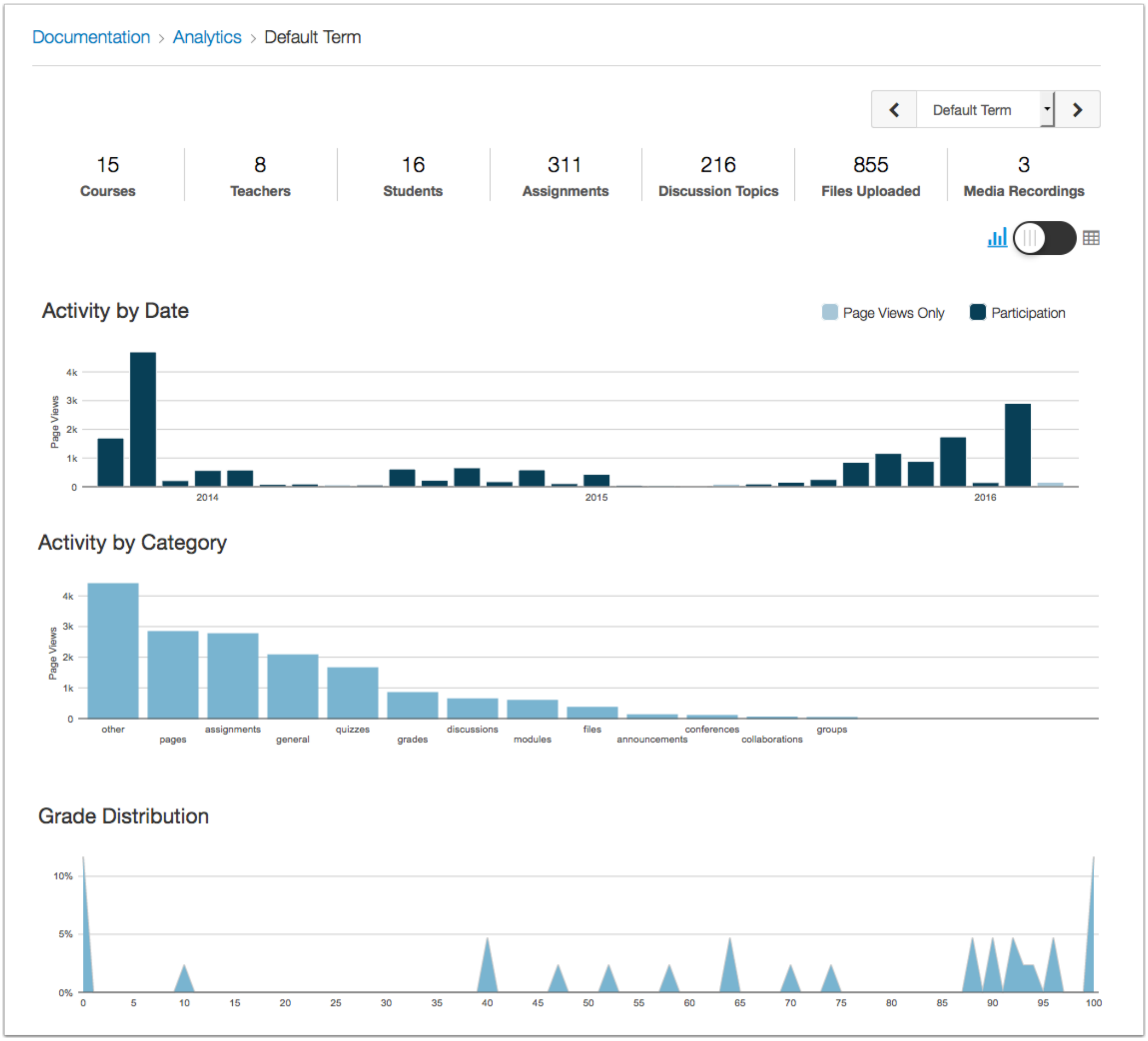
As an Account Admin, you can see the Analytics for the entire account. This way you can track and analyze what students, teachers, observers, and/or designers are doing within the account. Analytics work in conjunction with account Statistics.

View a video about Analytics and Statistics.

Notes:

- To view account analytics, Analytics must be enabled in Account Settings.
- Account analytics also includes analytics enabled at the sub-account level.
- Currently, analytics does not measure activity on mobile devices.

When Would I Use Account Analytics?



In Analytics, there are four main sections:

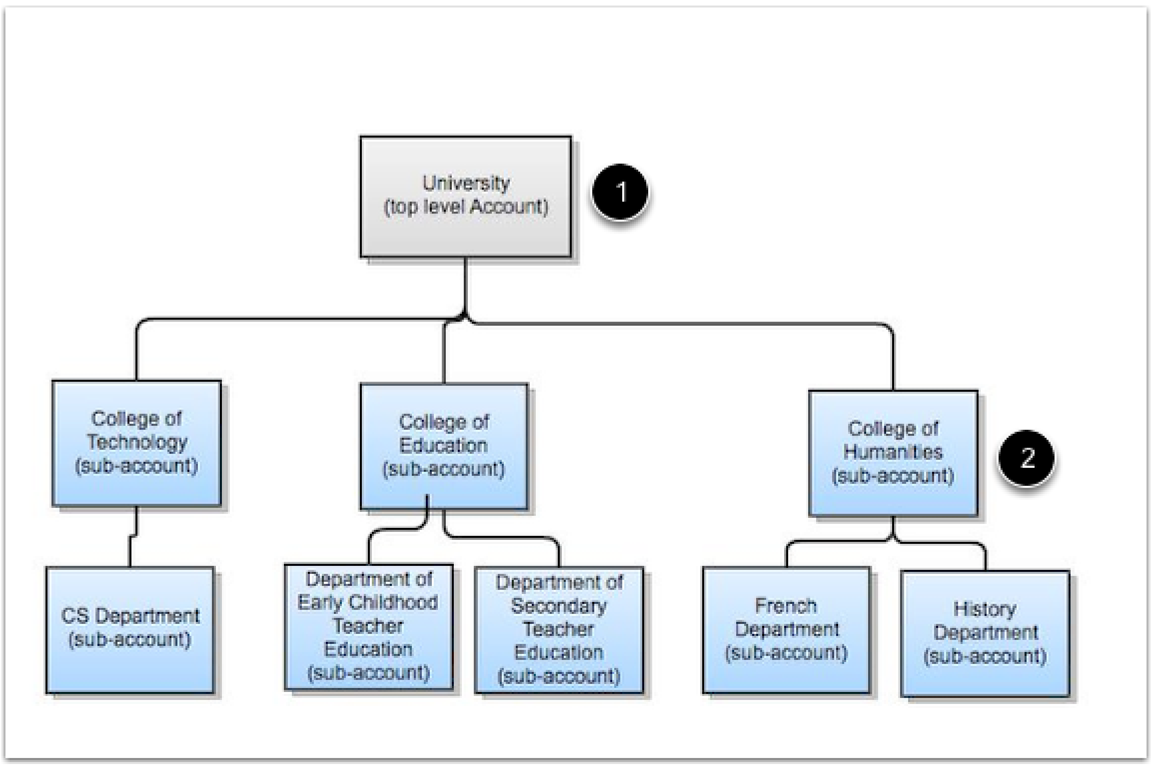
1. **Overview** of what is in the account including Courses, Teachers, Students, Assignments, Discussion Topics, Files Uploaded, and Media Recordings.
2. **Activity by date** allows the Admin to view how everyone is participating in the courses within the term and account.
3. **Activity by category** allows the Admin to view the participation for Pages, Assignments, Modules, Discussions, Grades, Files, Collaborations, Announcements, Groups, Conferences, General, and Other.
4. **Grade distribution** allows the Admin to view what the final grades and in progress grades look like during the term within the account.

For more details about these components, learn how to view account analytics.

Use Analytics to:

- Make sure the students, teachers, observers, and/or designers are participating in the course.
- See an overview of the term within the account.
- View how the users are interacting with the courses in the term.
- Watch how the grade distribution fluctuates or stays steady.
- View the total number of courses, teachers, students, assignments, submissions, discussion topics and replies, files, and media recording in the term within the account.

View Account Analytics Hierarchy



Analytics can be used at any level of the account, as long as the user has the account-level permission to view analytics. For example, admins in the root account [1] can view analytics for the account and all sub-accounts. Admins in sub-accounts [2] can view the analytics for their own sub-account and any additional sub-accounts below them.

Admins can also view course analytics within an account or sub-account. Instructors can view course analytics if they are also given the analytics permission at the course level.

How do I view Account Analytics?

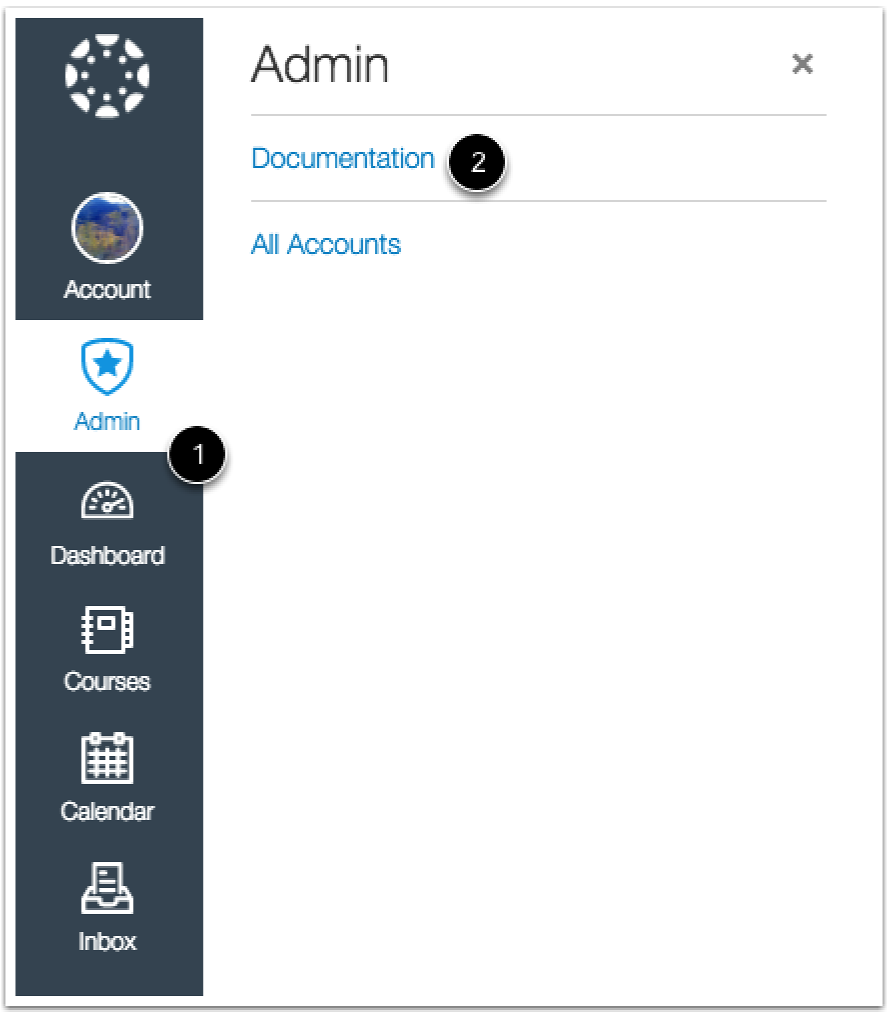
You can view account Analytics from your Account Courses page. Account Analytics show all analytics in your account. You can also view analytics as part of the account Statistics page.

If you need to view account analytics on a more granular level, learn how to view course analytics for a specific course.

Notes:

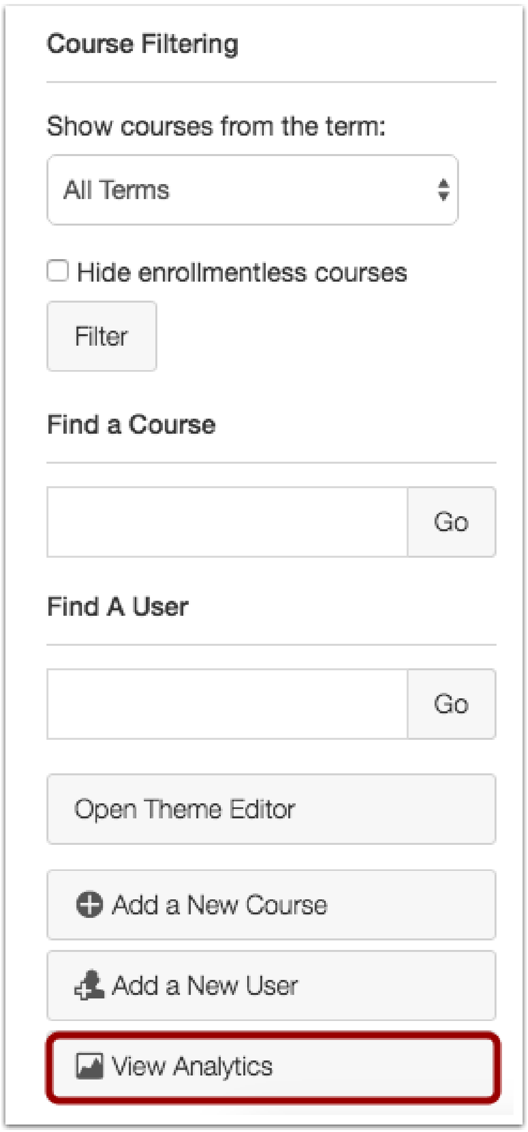
- Account analytics also includes analytics enabled at the sub-account level.
- Currently, analytics does not measure activity on mobile devices.

Open Account



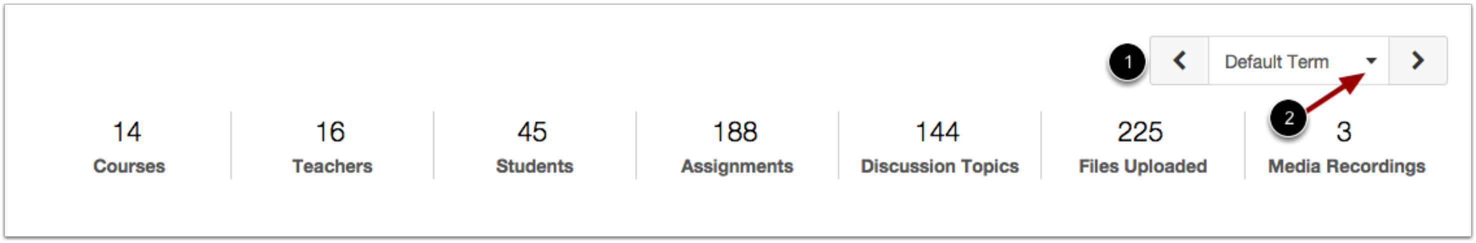
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Account Analytics



In the sidebar, click the **View Analytics** button.

View Term Overview



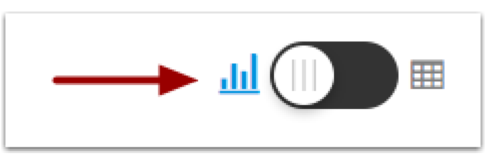
Account analytics shows you how many Courses, Teachers, Students, Assignments, Submissions, Discussion Topics, Files Uploaded, and Media Recordings there are for a selected term. By default, the account shows analytics for the Default Term.

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

For each term, Analytics includes the following overview:

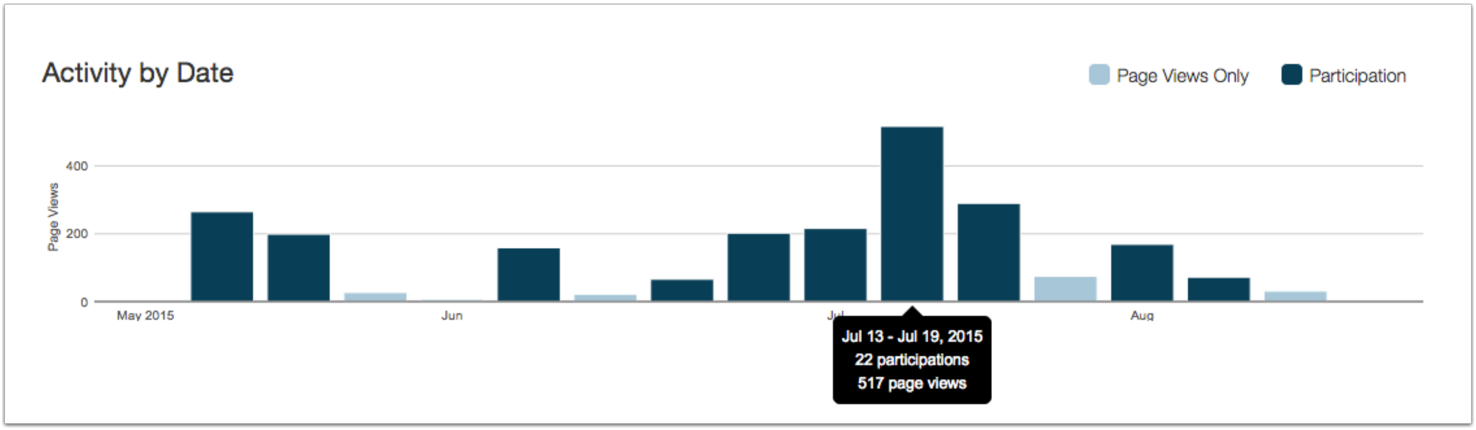
- **Courses** indicates the number of courses that are published in the account. This number does not count unpublished courses, deleted courses, or concluded courses.
- **Teachers** indicates how many unique teachers have had activity within the selected term. If one user is a teacher in 5 courses, 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.

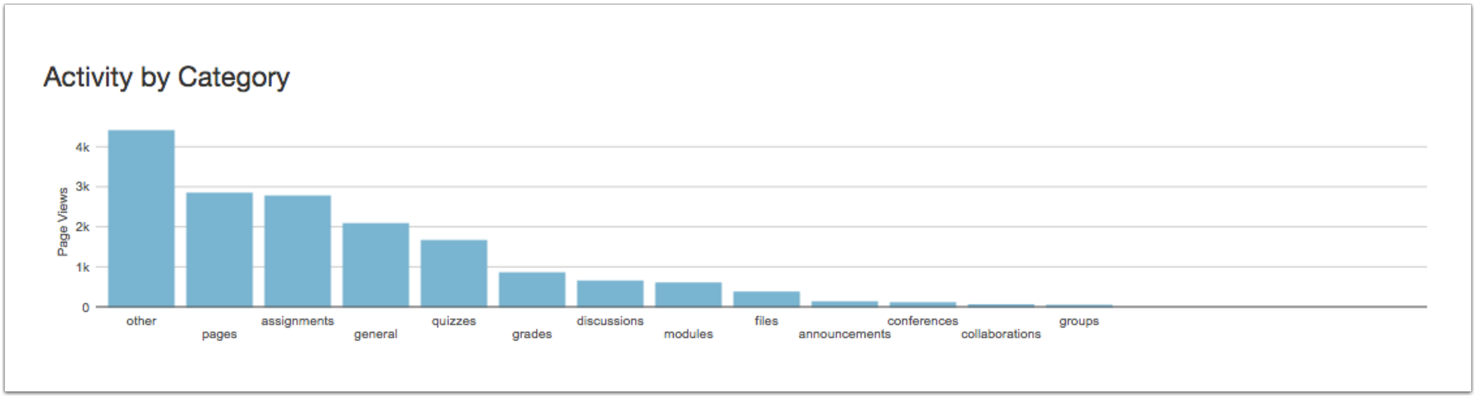
The graph changes the bar display according to the length of time. Activity that is less than six months old displays bars as daily activity, at six months bars are displayed as weekly activity, and at approximately a year bars are displayed as monthly activity. The weekly view shows the first and last 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.

The following user actions will generate analytics participation:

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

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

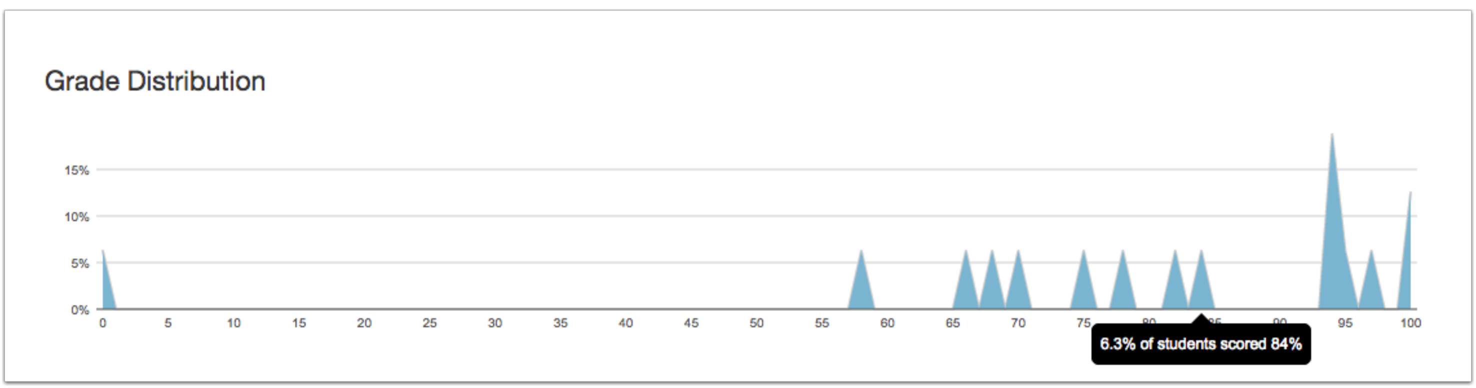


The View Activity by Category graph shows all activity in the account by feature category. The x-axis represents activity by category, while the y-axis represents the number of page views. The General category refers to the top level page views of the course that are not counted in the more specific 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.

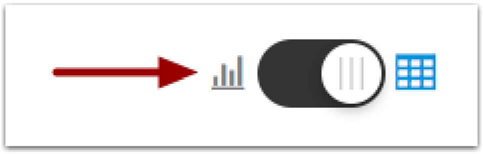
View Grade Distribution



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.

View Table Data

Activity by Date

Date	Page Views	Actions Taken
2016-03-10	84	0
2016-03-09	14	0
2016-03-08	4	0
2016-03-07	9	0
2016-03-06	3	0
2016-03-03	43	0
2016-03-02	2	0
2016-02-29	649	66

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.

2016-01-12	9	0
2016-01-11	46	4
2016-01-09	1	0
2016-01-08	6	0

<< < 1 2 3 4 5 > >>

Each table is paginated to 30 entries per page; additional pages can be viewed by advancing to the next page.

API

How do I obtain an API access token for an account?

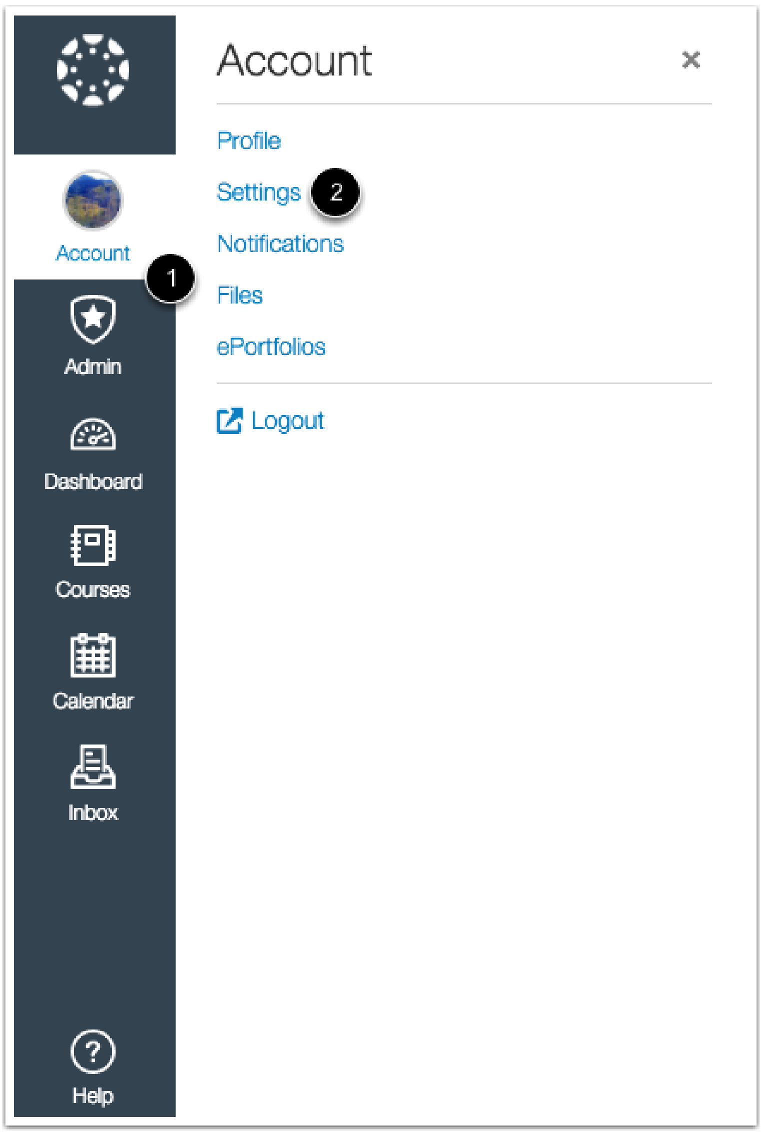
Canvas allows for programmatic access to some pieces of information via the Canvas API. API calls require authorization and are made on behalf of an authorized user.

You can see the most up-to-date Canvas API documentation on github, which may or may not be accurate for locally installed instances of Canvas. If you are not using Canvas Cloud, talk to you site administrator about getting an accurate set of API documentation. Documentation can be generated by running rake doc:api on the console.

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.

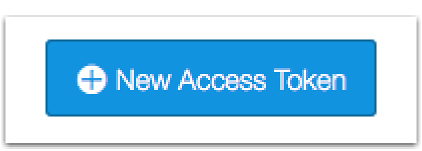
Note: API access tokens can only be removed by the user who created the token. Users with masquerading privileges cannot remove the token on behalf of the user.

Open User Settings



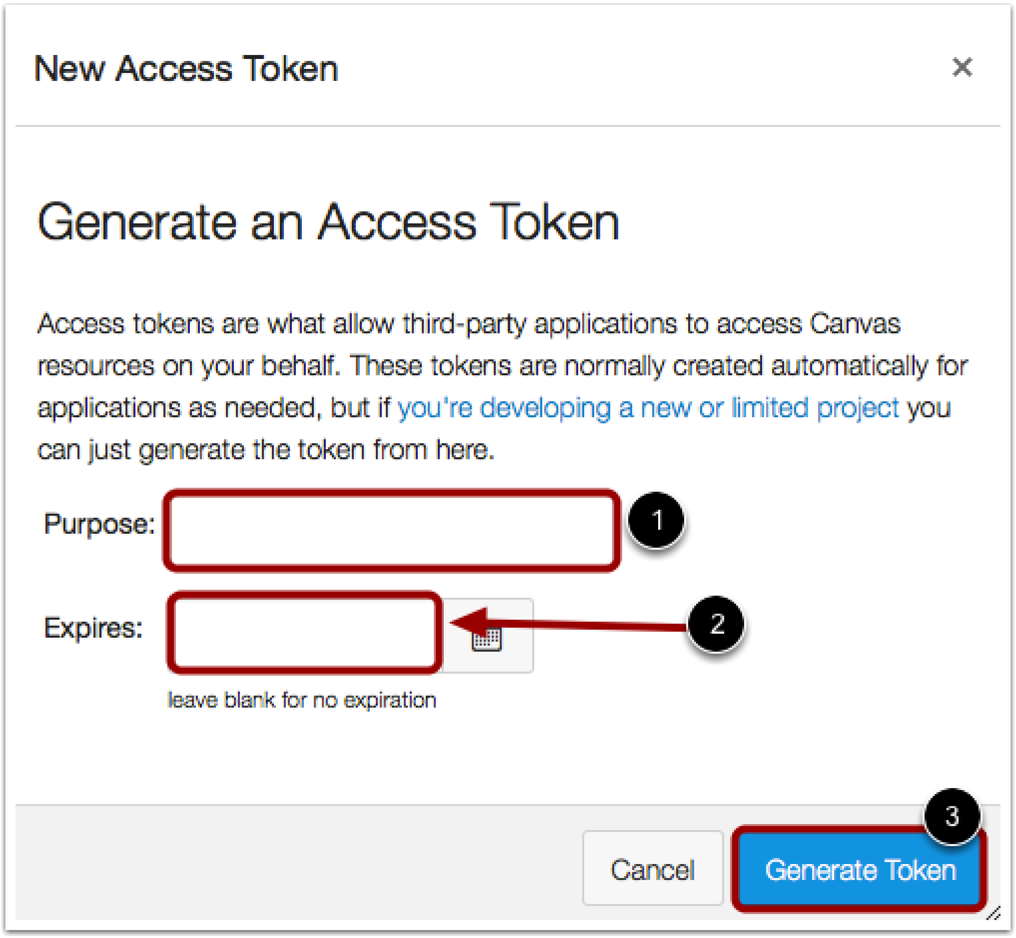
In Global Navigation, click the **Account** link [1], then click the **Settings** link [2].

Add New Access Token



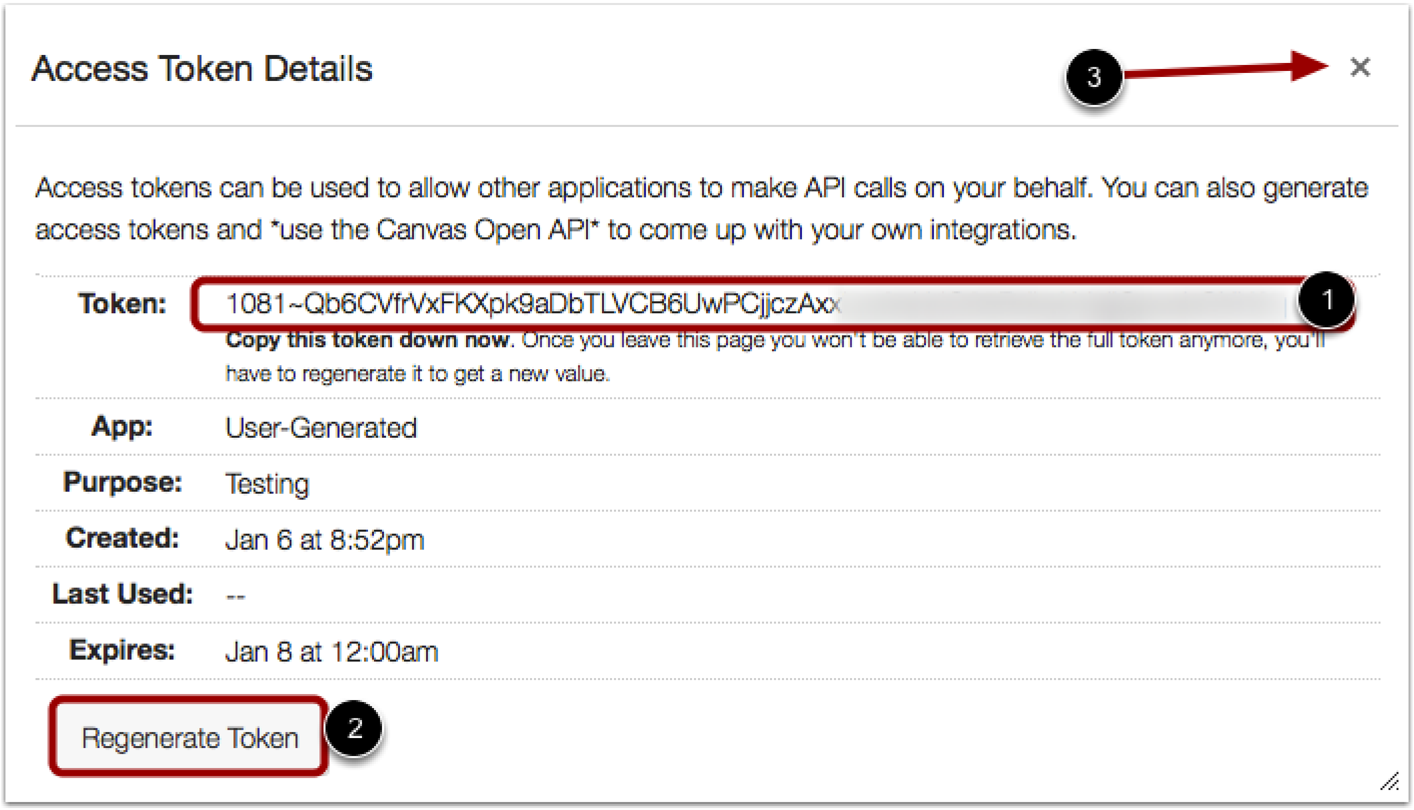
Locate Approved Integrations and click the **Add New Access Token** button.

Enter Token Information



Enter the purpose for the token in the purpose field [1]. Set the expiration date for the token by clicking the **Calendar** icon [2]. If there is no expiration for the token, leave the expires field blank. Click the **Generate Token** button [3].

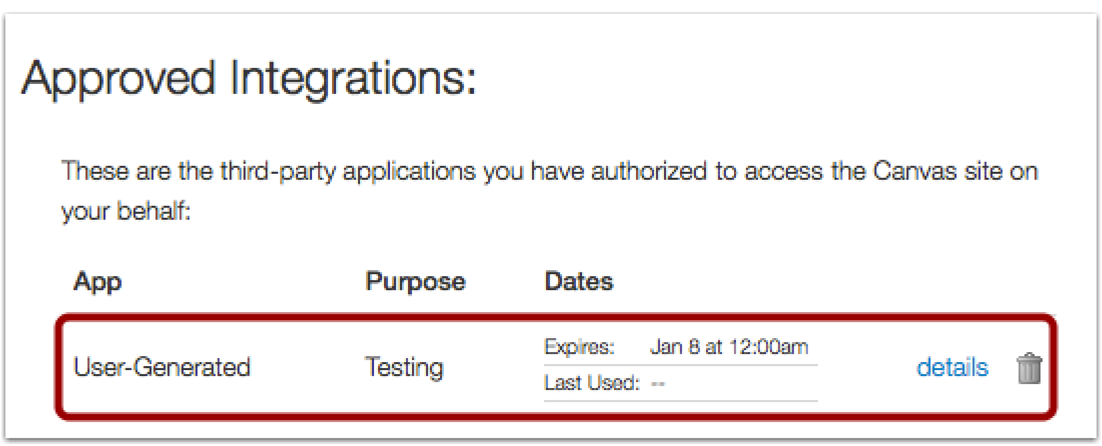
Copy Token



Copy the token given to you [1]. To regenerate a new token, click the **Regenerate Token** button [2]. To close the window, click the **X** icon [3].

Note: You are only given the access token once. If you do not copy it down, you will need to create a new token.

View Approved Integrations



View the approved integrations. You can remove the integration by clicking the **Delete** icon.

How do I make API calls in an account with an access token?

Option One: Make A Call Over HTTPS

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:

```
curl -H "Authorization: Bearer <ACCESS-TOKEN>" https://canvas.instructure.com/api/v1/courses
```

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.

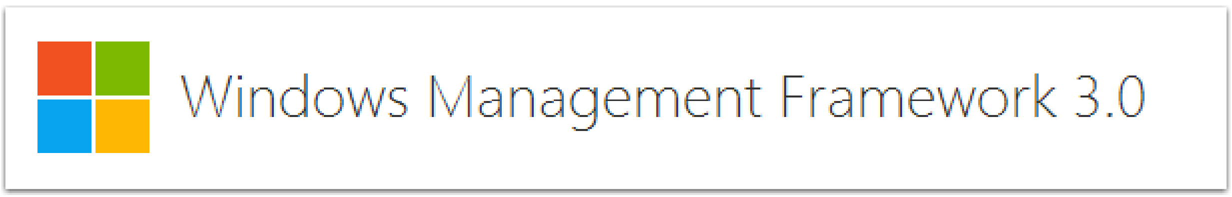
See the example on the [API documentation site].

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. 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



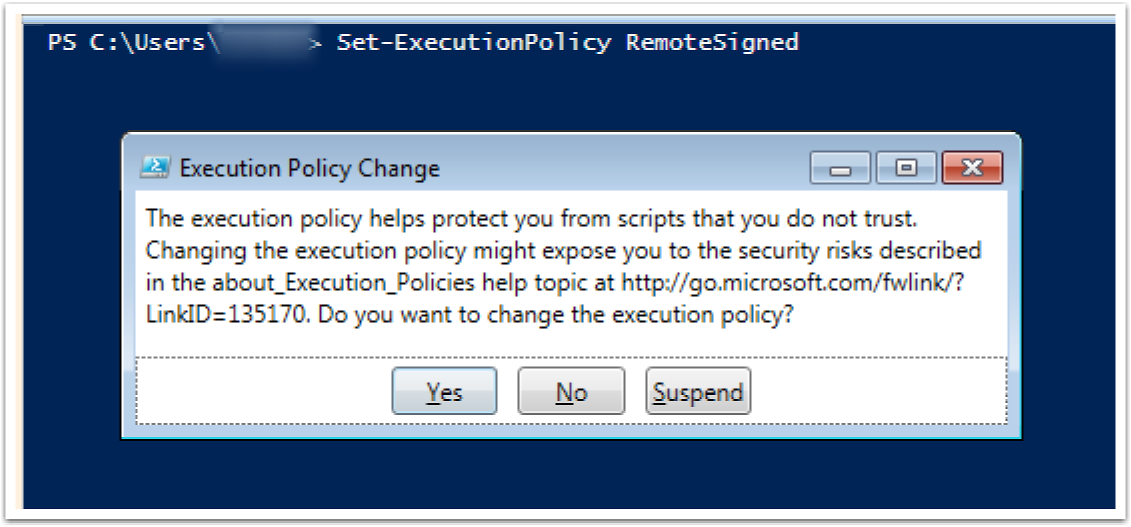
Find and download the most recent version of Windows Management Framework 3.0, which includes PowerShell version 3.

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



1. Go to http://technet.microsoft.com/en-us/library/ee176949.aspx
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)

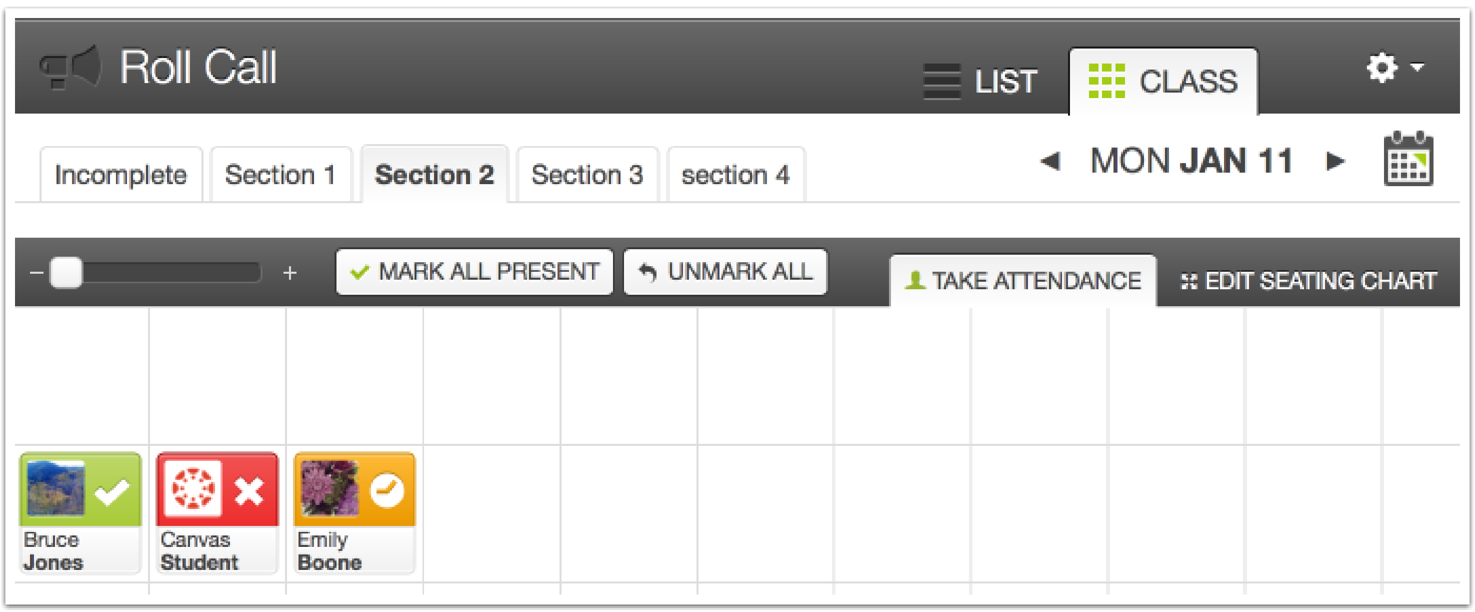
What is the Roll Call Attendance Tool?

The Attendance (Roll Call) tool is an external app (LTI) used for taking attendance in Canvas courses. The Attendance tool can be used for online or face-to-face courses. Enabled at the account level, the Roll Call Attendance tool can be used by all courses in the Canvas account.

The Attendance tool always appears as a visible Course Navigation link, but it cannot be viewed by students, so hiding the link in Course Settings is not necessary. If instructors do not want to use the Attendance tool in their courses, no action is required.

Note: The Attendance tool must be enabled for your institution before it can be used in Canvas courses. If you are an admin, contact your Customer Success Manager for assistance.

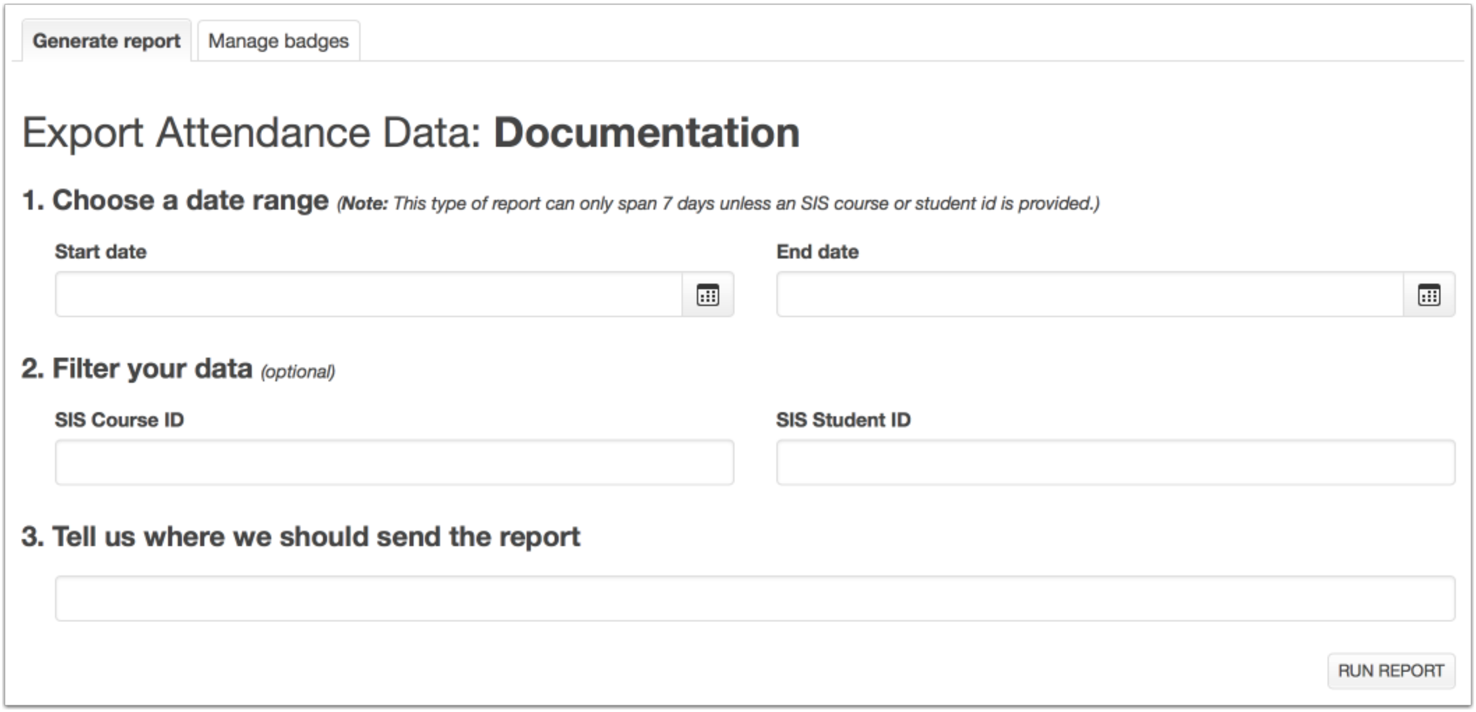
Take Attendance



With the Attendance tool, instructors can keep track of course attendance by taking roll electronically. Instructors can choose to view the tool in a list or grid format and can customize the placement of each student in the seating chart.

The Attendance tool also creates an assignment in the Gradebook and calculates attendance as a percentage of a student's grade.

Export Attendance Data



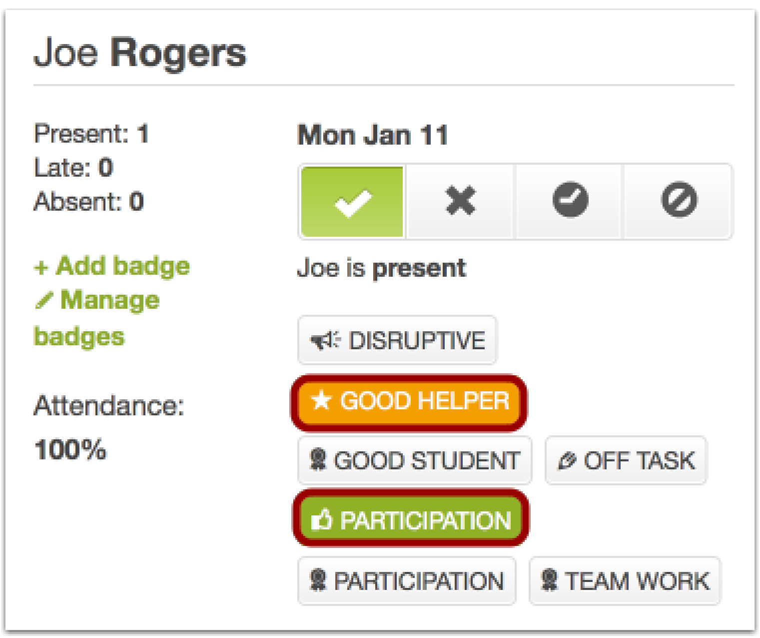
At both the account and course levels, the Attendance tool allows users to create attendance reports.

Notes:

- Admins can also filter reports by SIS Course ID.
- Roll Call Attendance Badges are not included in reports.

Create and Manage Badges

At the account level, admins can create and manage badges used in the Attendance Tool.



At the course level, any badges added by a Canvas admin automatically appear for the course. However, instructors can also create additional badges for their course as needed.

How do I run Roll Call Attendance reports for an account?

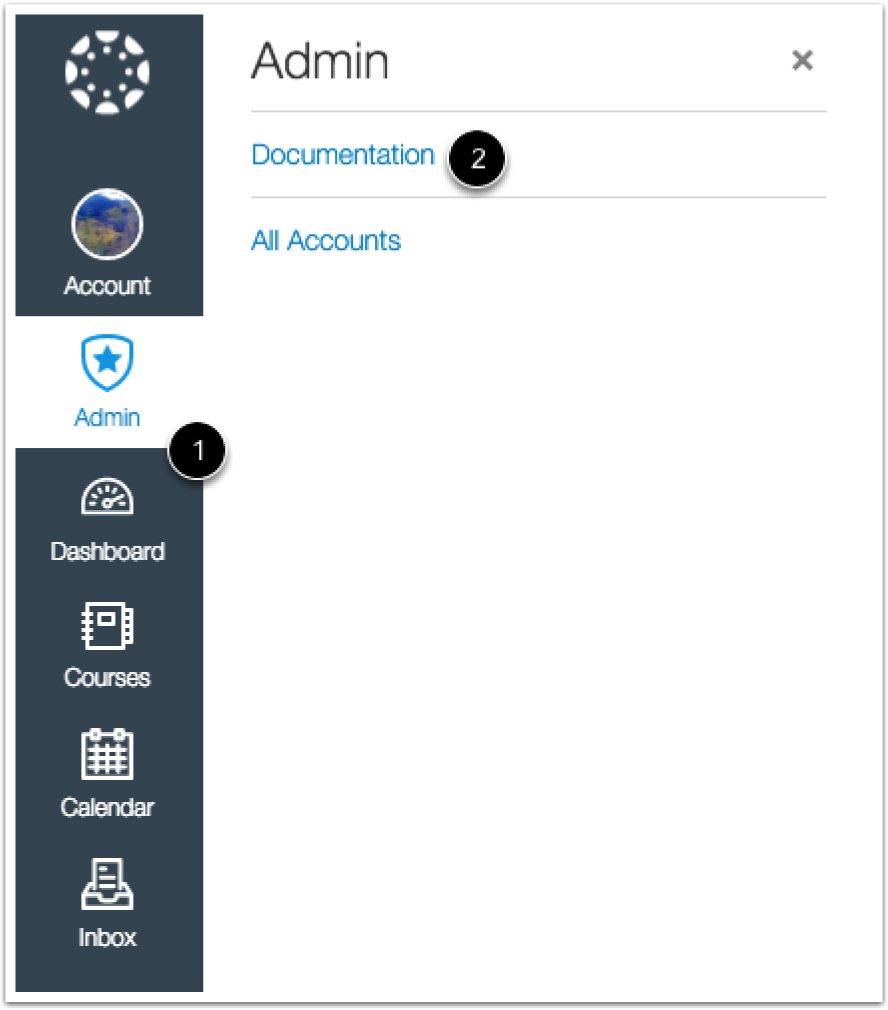
You can run reports to review attendance information for a subset of the courses and students in your account. This report is sent to your email, where it can be downloaded as a CSV file.

Reports are delivered in a comma separated value (CSV) format and display 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.

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).

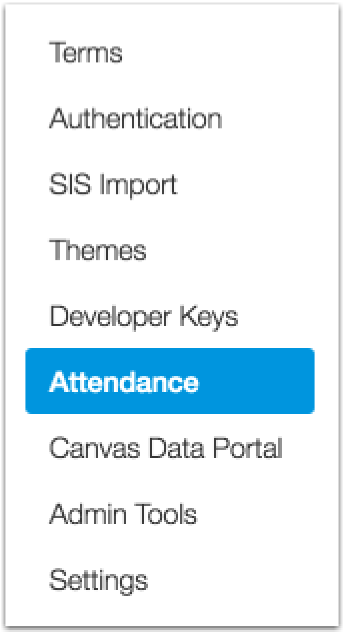
Note: Roll Call Attendance Badges are not included in reports.

Open Account



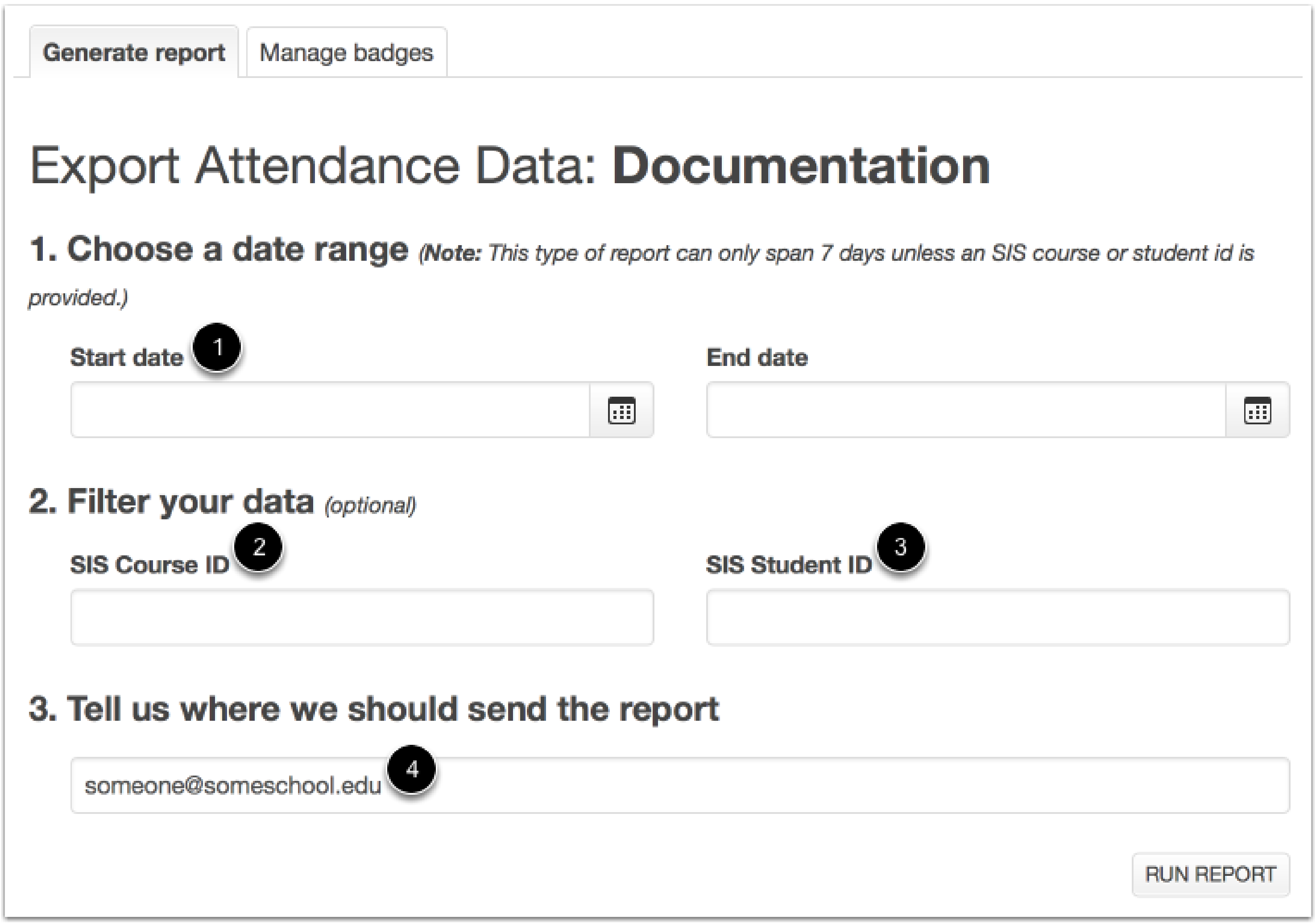
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Attendance



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

Specify Report Data

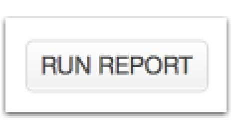


In the Generate Report tab, you can specify criteria for your report. If you leave the fields blank, the report will be generated for the entire account.

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].

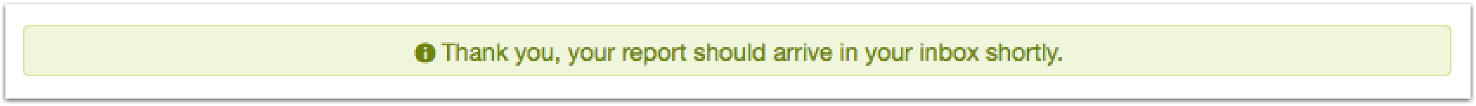
By default, the email field [4] will be populated with your email address to send the report. Confirm your email in the field or enter a new email address.

Run Report



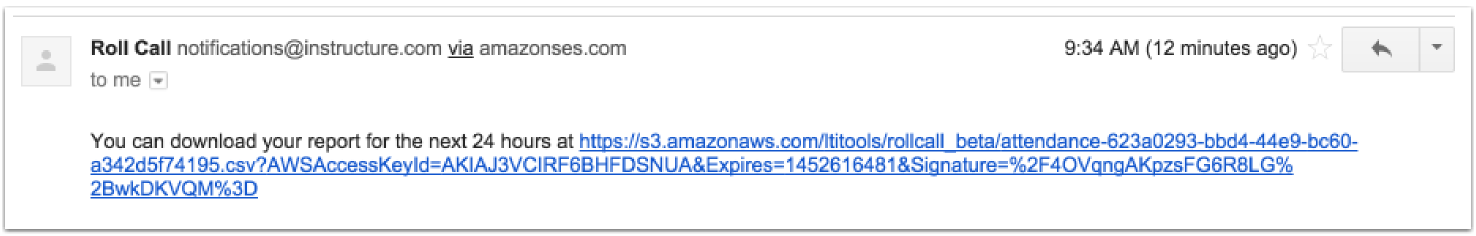
Click the **Run Report** button.

View Notification



A notification should appear if your request was successfully submitted.

View Email



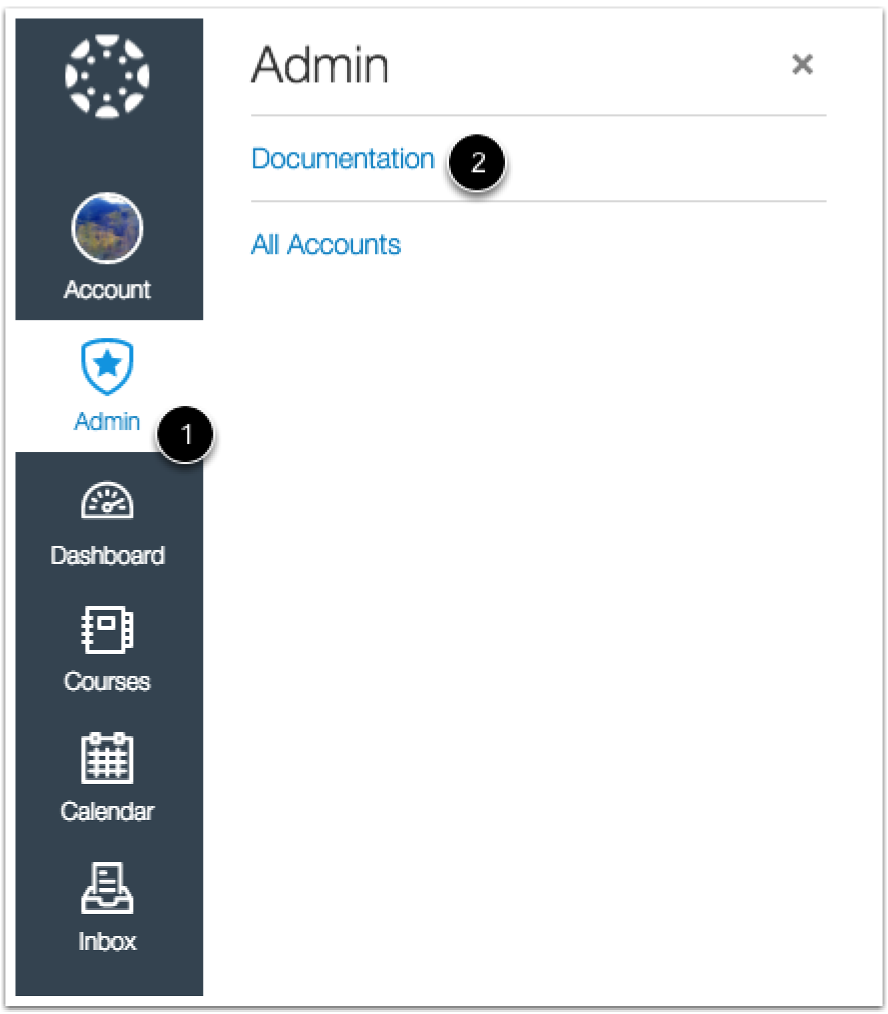
You will receive an email with the subject Roll Call Attendance Report. The email contains a link where you can access your attendance report for the next 24 hours. When you click the link, you can choose to view or download the report results.

How do I add Roll Call Attendance badges to an account?

You can add badges at the account level that appear to all instructors with courses under that account. These badges appear in the Roll Call Attendance tool. It can be helpful to create account-level badges when you want all your instructors to track a particular behavior or achievement among their students.

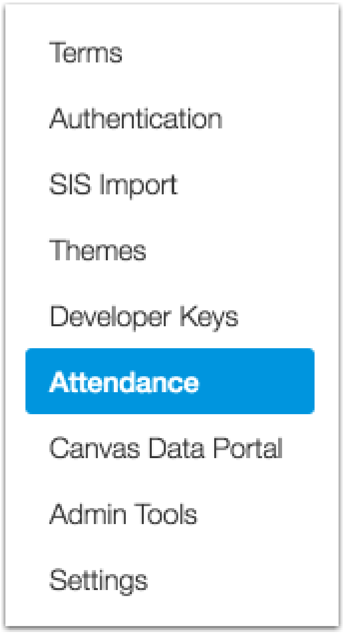
Instructors can also create their own badges within their courses. However, you can manage badges within a course at any time.

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.

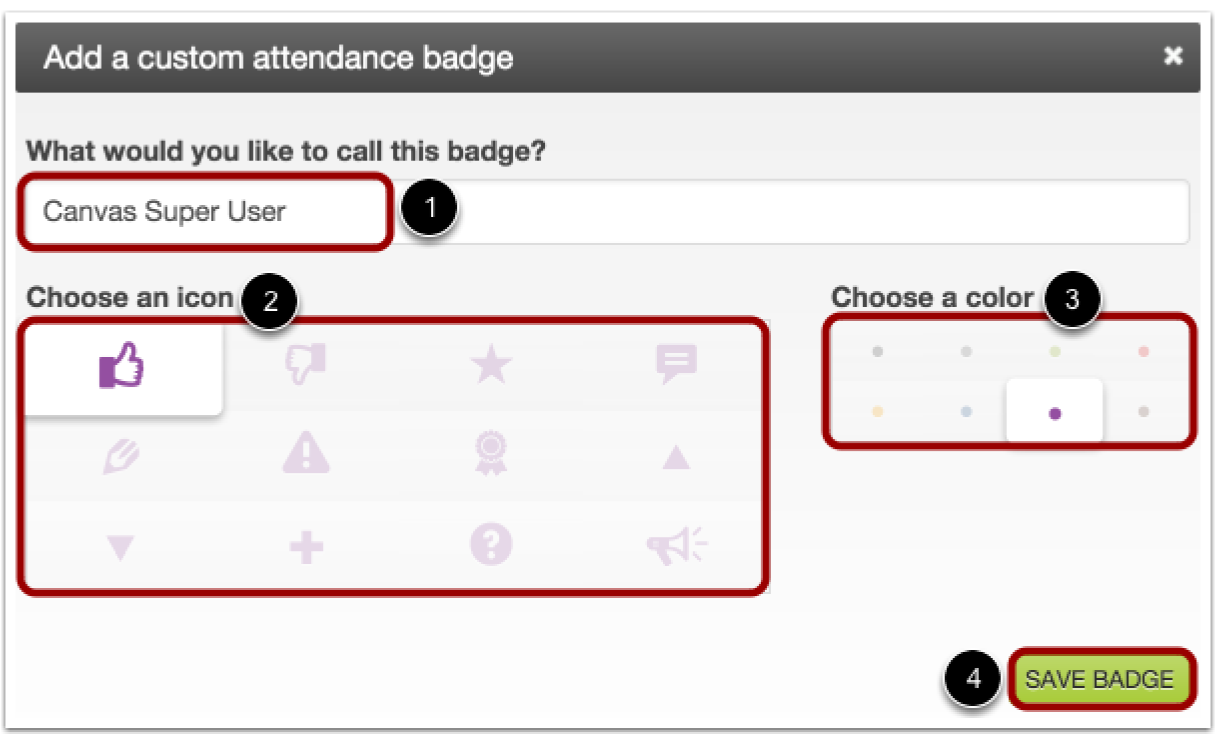
Manage Badges

Click the **Manage badges** tab.

Add Badge

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.

Authentication

How do I configure Canvas authentication for an account through self registration?

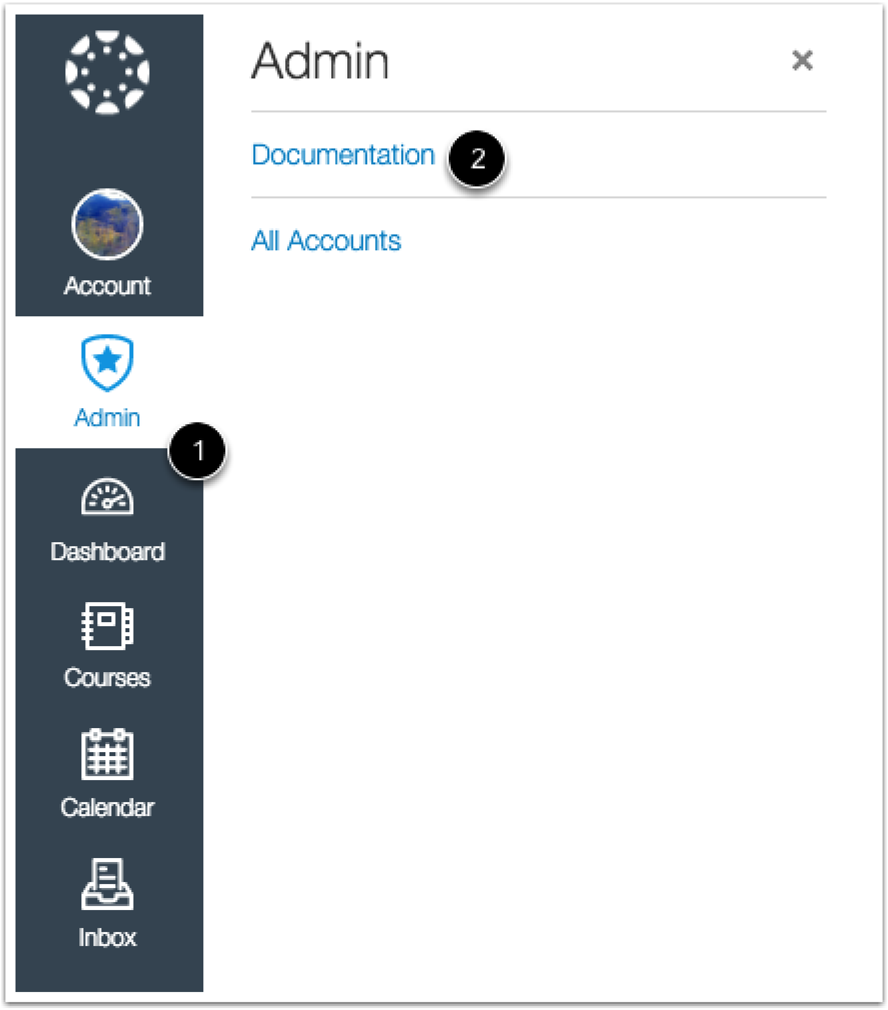
When logging in to Canvas, all users must have an account. Students and instructors most likely have an account as generated by your student information system (SIS). However, if you need to allow other users to sign up for a course in your account, you can enable self registration. Self registration is an authentication method through Canvas that allows users to create their own Canvas accounts. You can allow self registration for all user roles (including students and instructors) or only observer (parent) roles, which places a registration banner on your account login page. For example, see how users sign up as a parent (observer).

Self Registration 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.

When self registration is enabled for all roles, users can only sign up as a student if self enrollment is also enabled for the account. Self enrollment creates a join code, which students need if they are creating their own Canvas accounts. Learn more about enrollment options in your account.

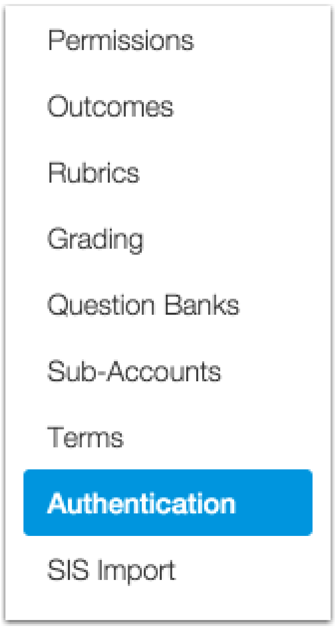
Note: You cannot delete Canvas authentication as an authentication option.

Open Account



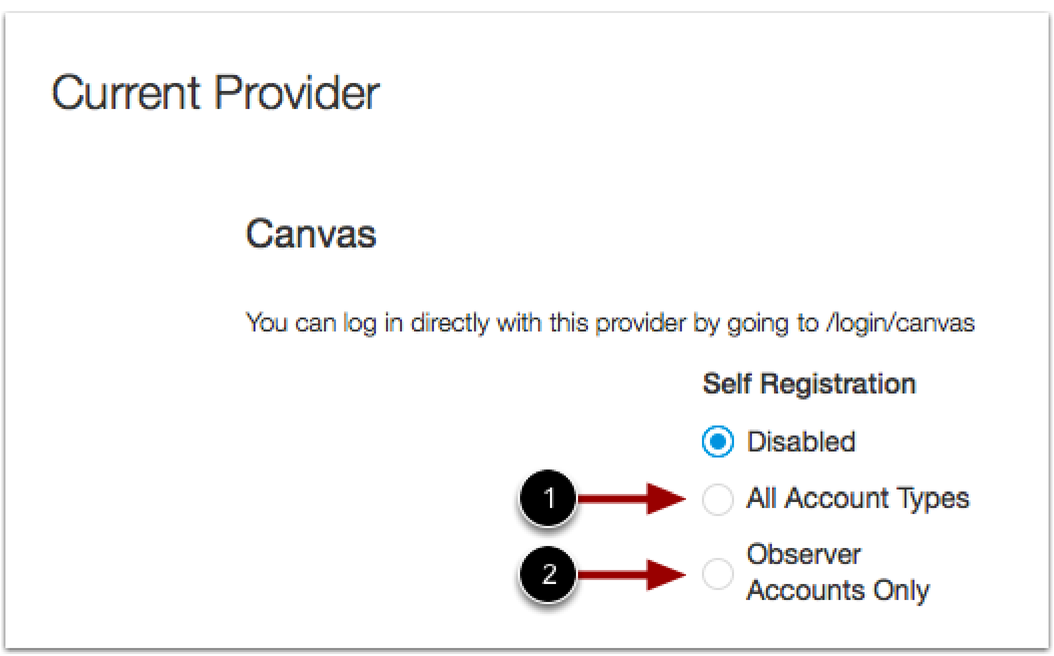
Click the **Admin** link [1], then click the name of the account [2].

Open Authentication



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

Change Self Registration



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, 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, Microsoft, 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

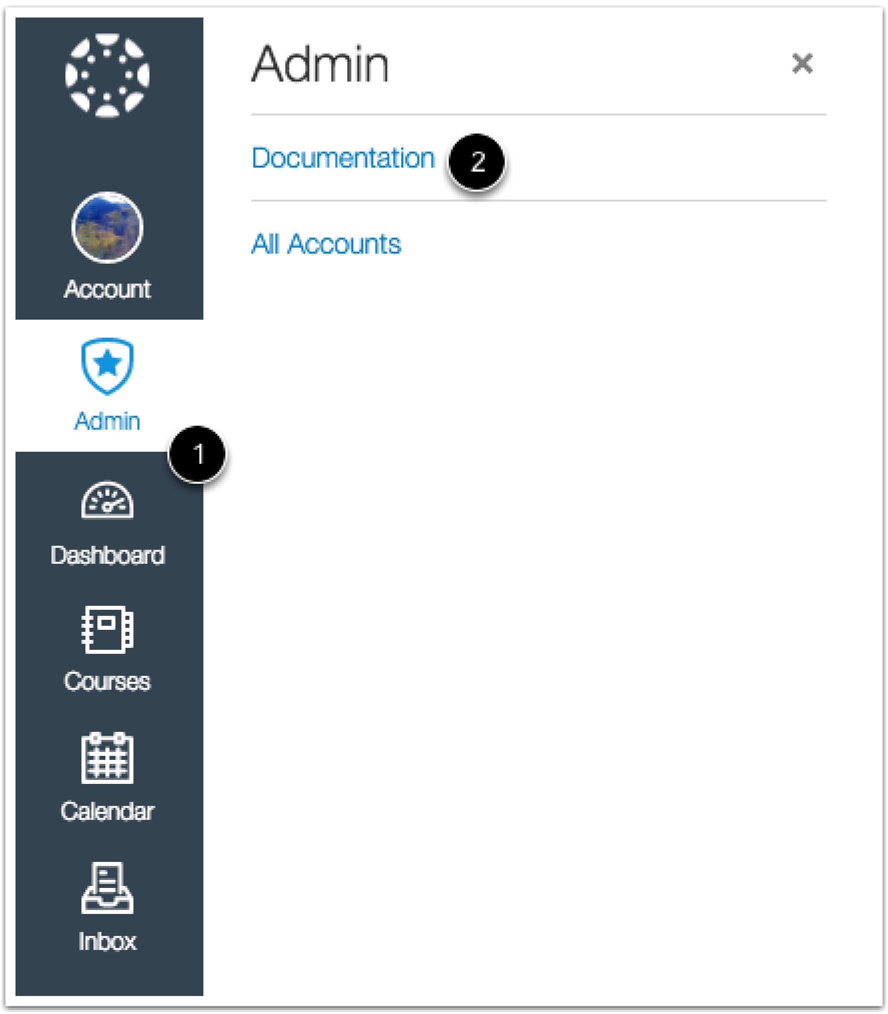
As part of the authentication process, admins can apply Just in Time Provisioning, which tells Canvas to automatically create a user's accounts if one does not already exist. Currently when a user logs in to Canvas using a third-party authentication system, Canvas searches users in the account looking 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

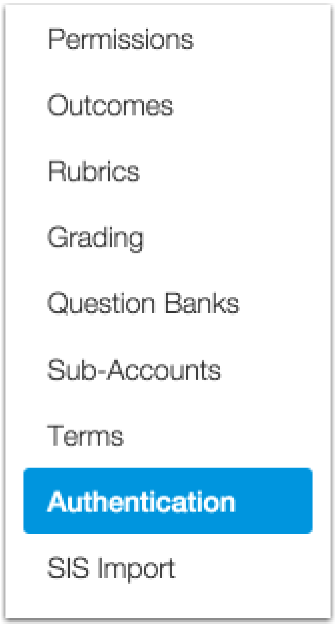
As a complement to JIT provisioning, SAML authentication supports federated attributes. When users log into Canvas, more information beyond just ID is passed to Canvas, and that information is associated with their existing user accounts. Additional information includes display name, email, given name, integration ID, locale, name, sis user ID, sortable name, surname, and time zone. More information can also be found in the Authentication Providers API.

Open Account



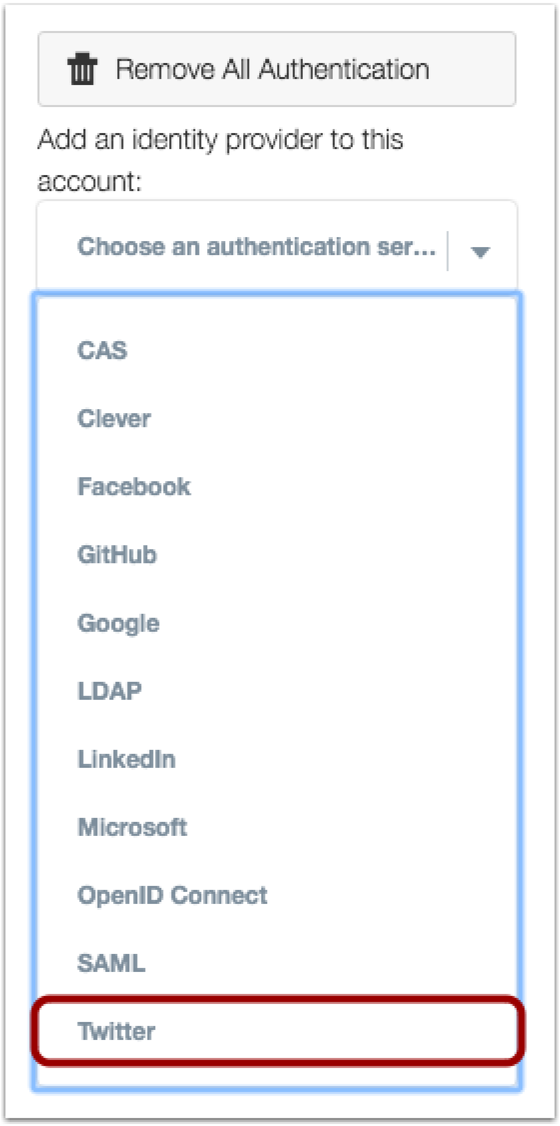
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Authentication



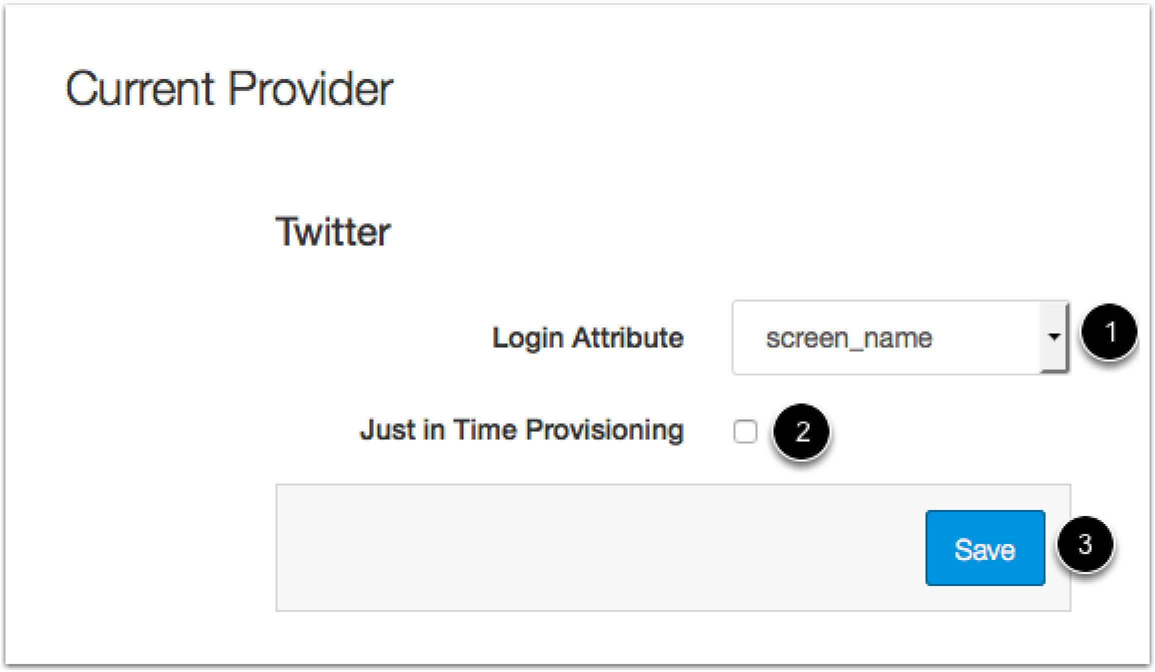
In Account Navigation, click the **Authentication** link.

Choose Provider



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

Save Provider Data

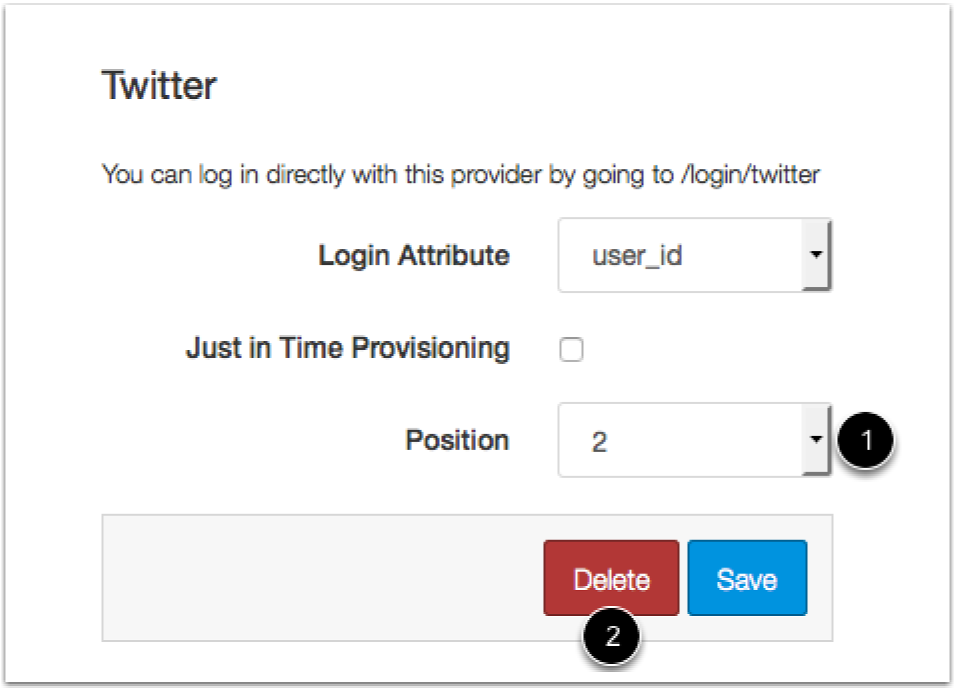


Enter the data required by the service [1]. Some providers require custom components for configuration.

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

Click the **Save** button [3].

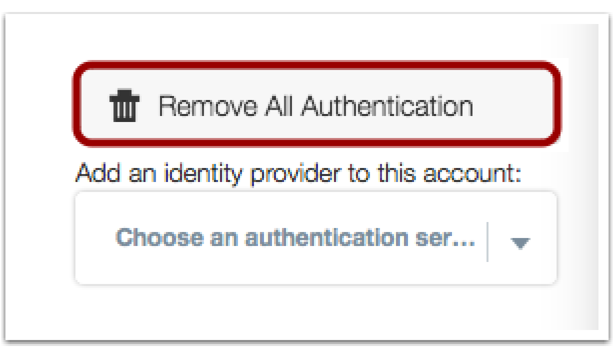
Manage Provider



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 All Authentication



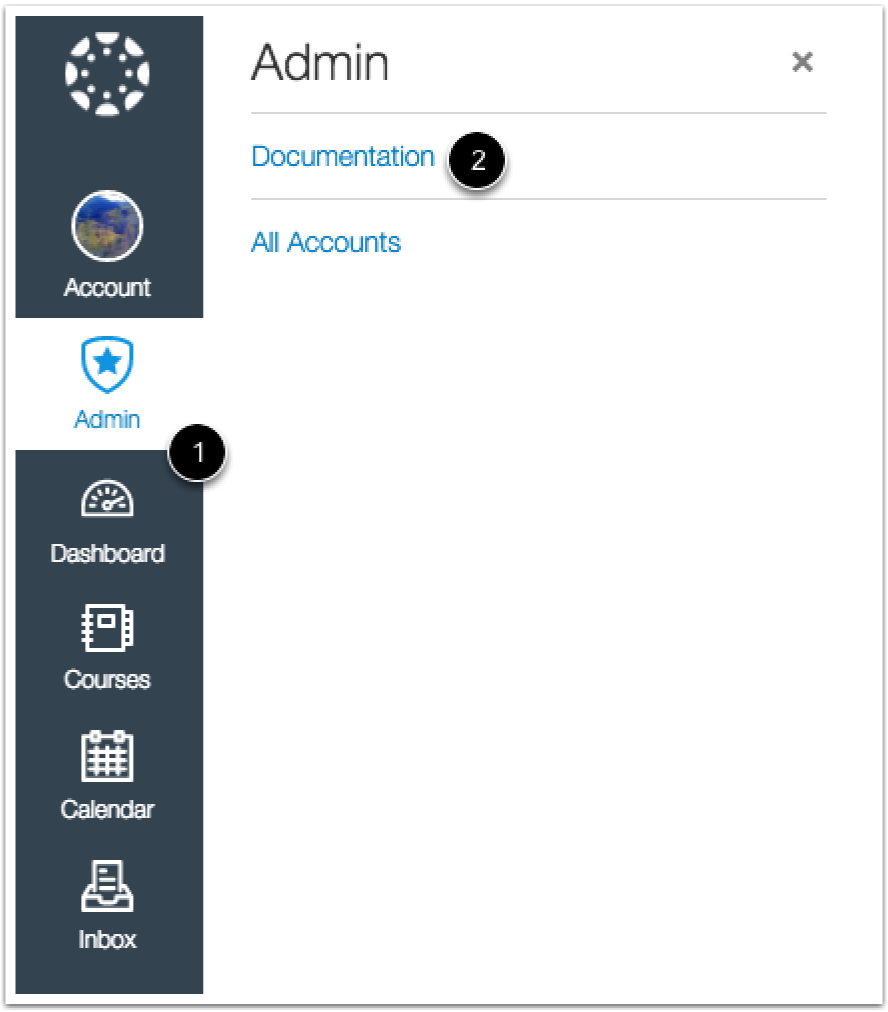
To remove all previously configured authentication providers, click the **Remove All Authentication** button.

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

How do I configure SSO settings for my authentication provider?

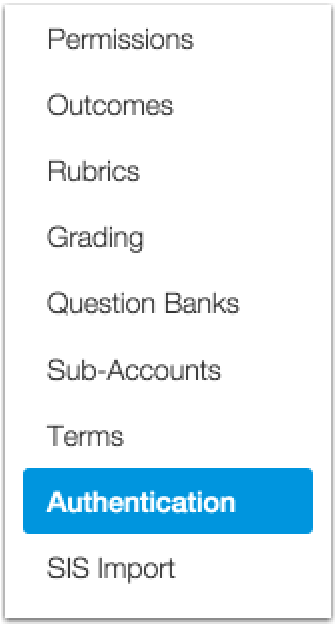
As part of Canvas authentication or third-party authentication, you can configure Single Sign On (SSO) settings for your account. Changing the label also changes the login text on the password reset page.

Open Account



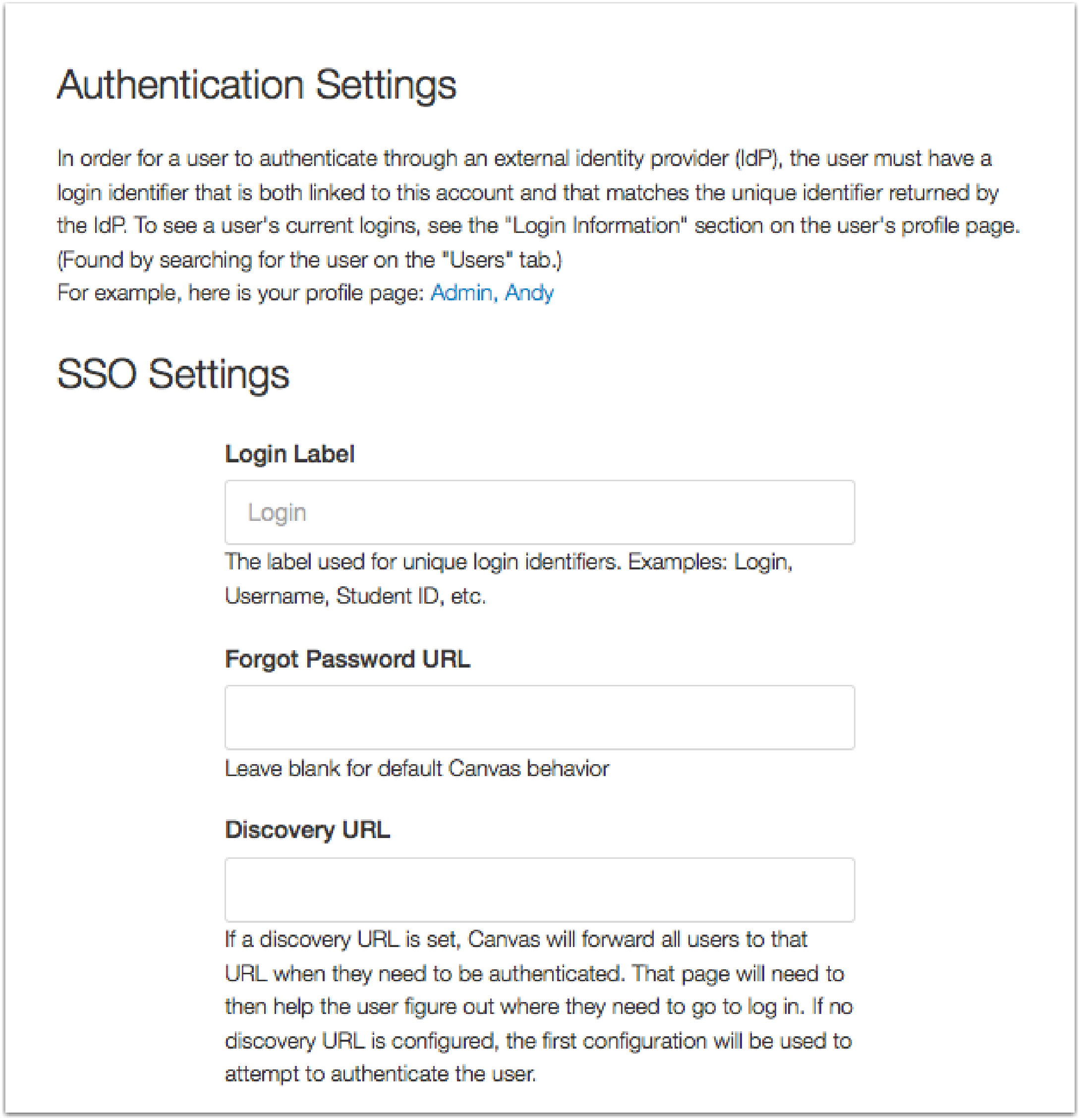
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Settings



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

Configure SSO Settings



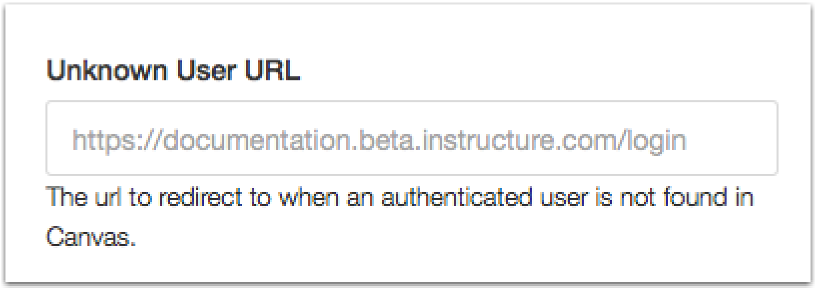
In the SSO Settings section, enter details for the appropriate fields.

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

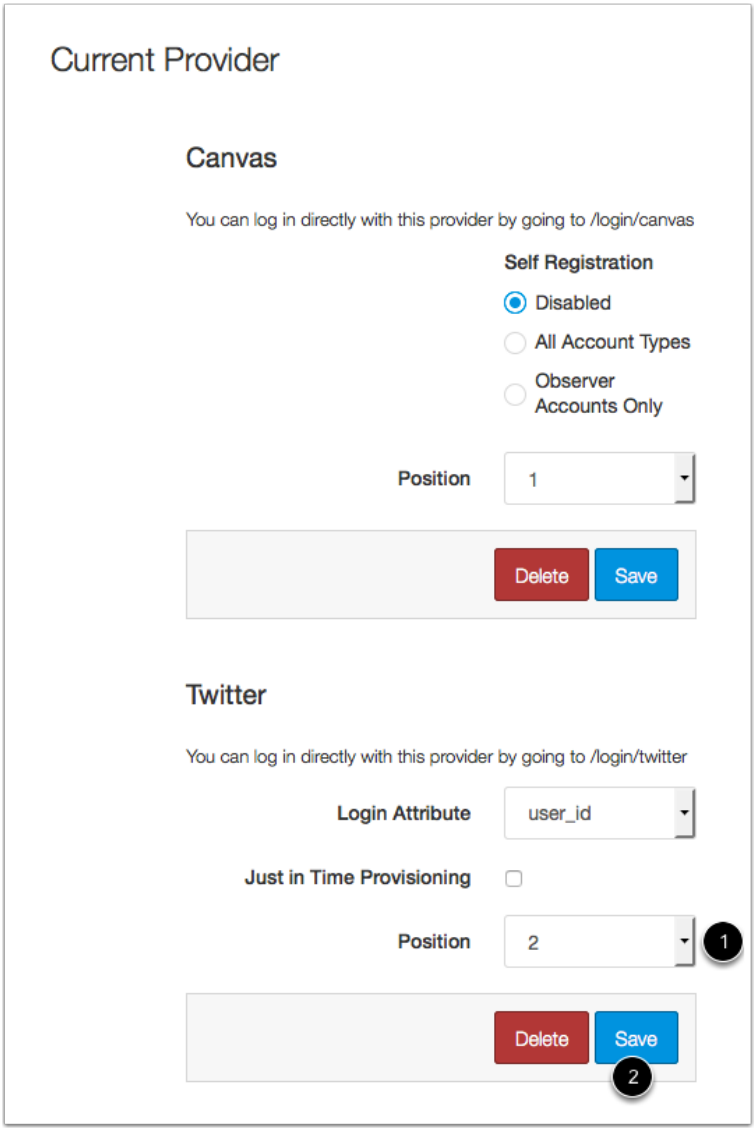


When using a third-party authentication provider, you can also enter a URL that redirects users if an authenticated user is not found in Canvas.

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: You cannot delete Canvas authentication as an authentication option.

Canvas Data

What is Canvas Data?

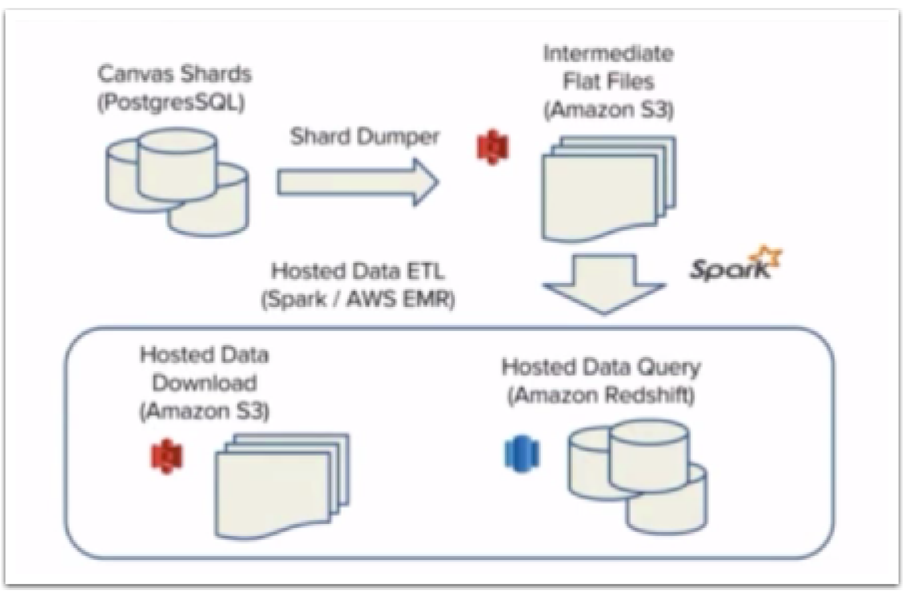
Canvas Data is a service from Canvas that provides admins with optimized access to their data for reporting and queries. Customers can combine their Canvas Data with data from other trusted institutions, as well as other key systems across campus such as a student information system (SIS).

The Canvas Data Administrator for an institution must be a Canvas admin. The Canvas Data Administrator 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.

Canvas Data Administrators 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.

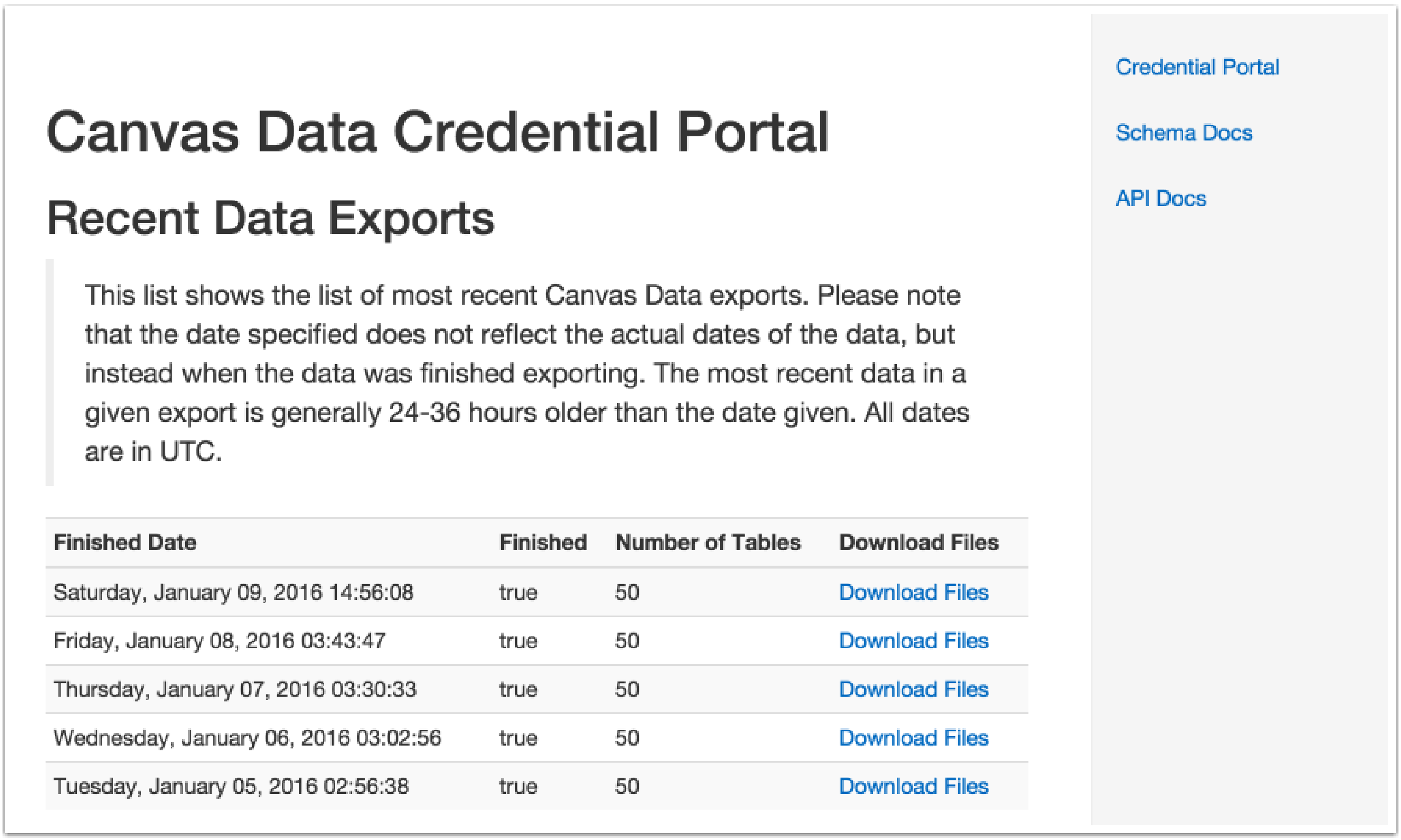
Canvas Data Exports



Canvas Data parses and agregates 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. Additionally, Canvas Data has a pilot program underway with customers using the hosted option for Canvas Data. Contact your Customer Success Manager for details.

Canvas Data Access

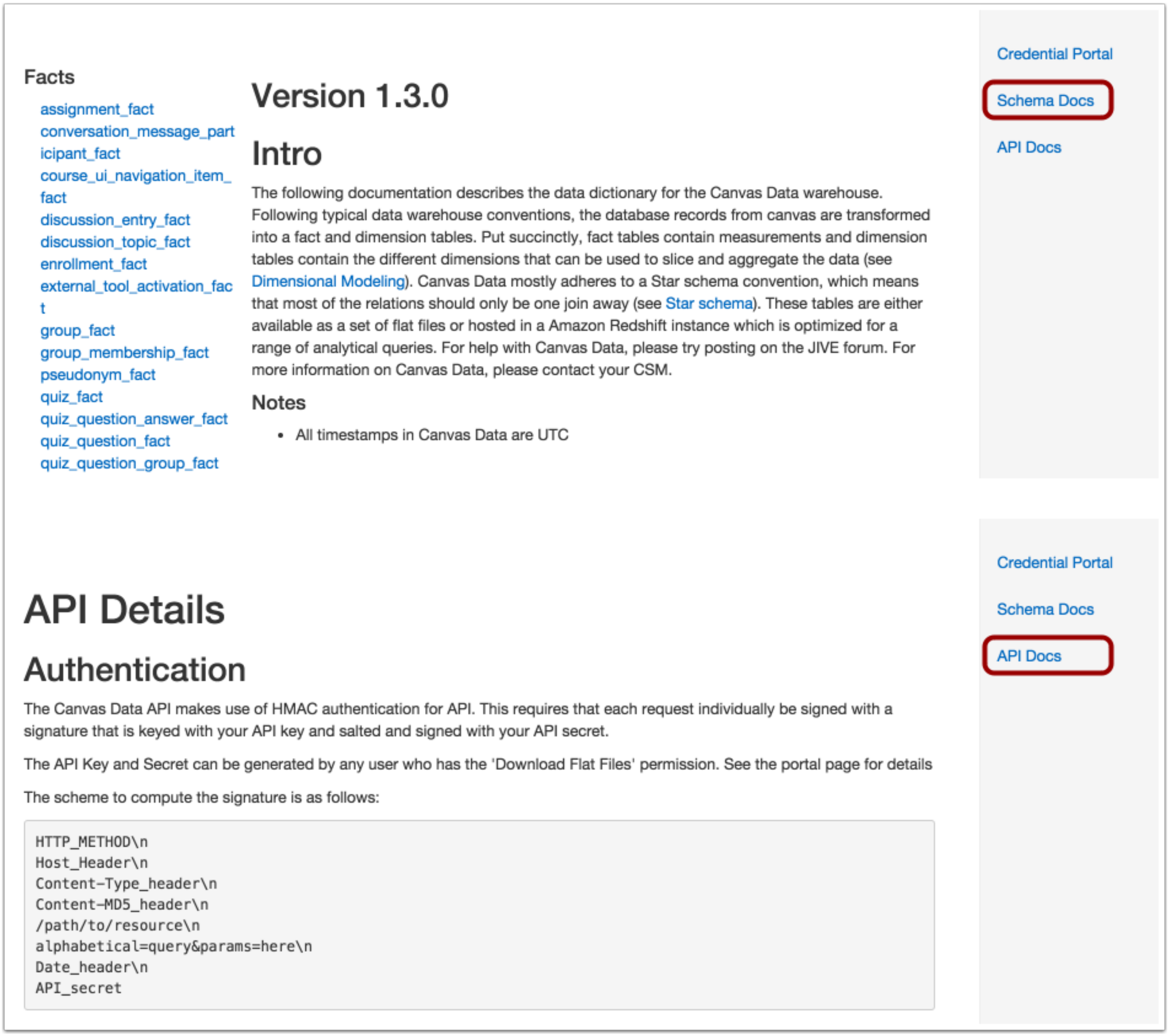


Finished Date	Finished	Number of Tables	Download Files
Saturday, January 09, 2016 14:56:08	true	50	Download Files
Friday, January 08, 2016 03:43:47	true	50	Download Files
Thursday, January 07, 2016 03:30:33	true	50	Download Files
Wednesday, January 06, 2016 03:02:56	true	50	Download Files
Tuesday, January 05, 2016 02:56:38	true	50	Download Files

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 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



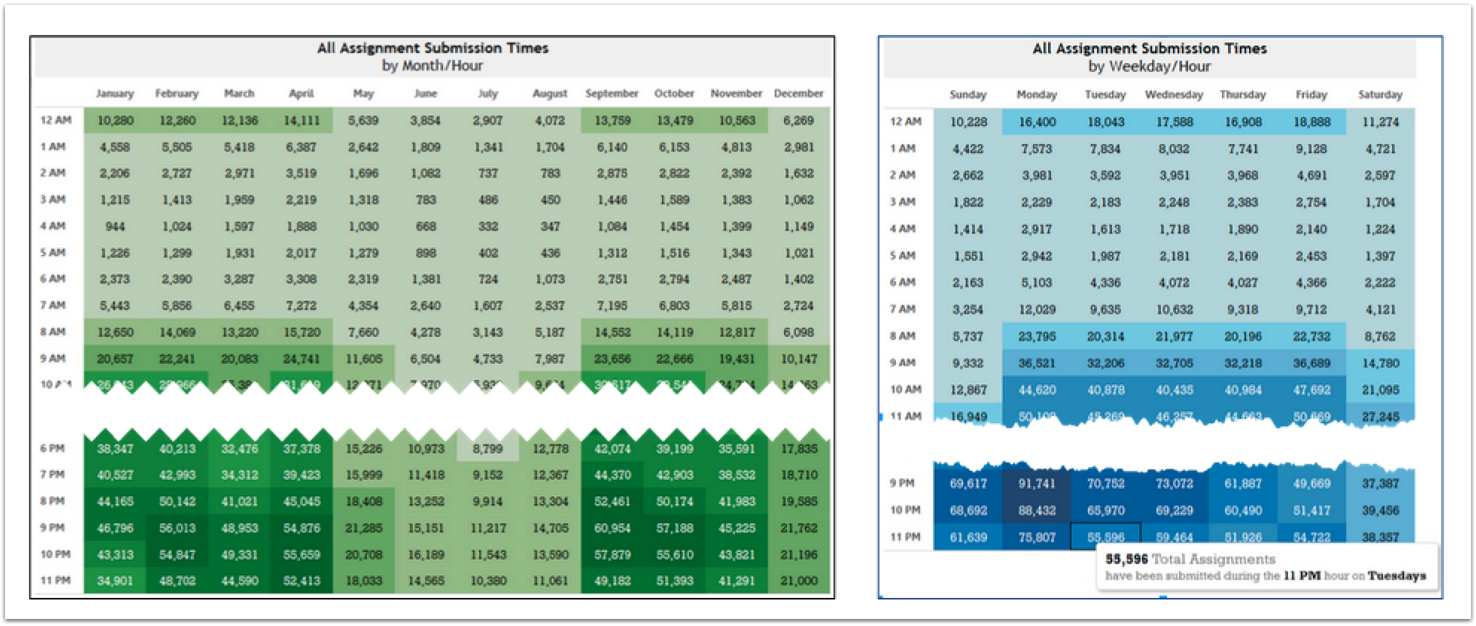
Admins can use Canvas Data schemas and APIs to get insight on topics such as accreditation, improving course design, assessing student engagements and, enabling student intervention.

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?

ODBC Analytics Tools



All Assignment Submission Times
by Month/Hour

	January	February	March	April	May	June	July	August	September	October	November	December
12 AM	10,280	12,260	12,136	14,111	5,639	3,854	2,907	4,072	13,759	13,479	10,563	6,269
1 AM	4,558	5,505	5,418	6,387	2,642	1,809	1,341	1,704	6,140	6,153	4,813	2,981
2 AM	2,206	2,727	2,971	3,519	1,696	1,082	737	783	2,875	2,822	2,392	1,632
3 AM	1,215	1,413	1,959	2,219	1,318	783	486	450	1,446	1,589	1,383	1,062
4 AM	944	1,024	1,597	1,888	1,030	668	332	347	1,084	1,454	1,399	1,149
5 AM	1,226	1,299	1,931	2,017	1,279	898	402	436	1,312	1,516	1,343	1,021
6 AM	2,373	2,390	3,287	3,308	2,319	1,381	724	1,073	2,751	2,794	2,487	1,402
7 AM	5,443	5,856	6,455	7,272	4,354	2,640	1,607	2,537	7,195	6,803	5,815	2,724
8 AM	12,650	14,069	13,220	15,720	7,660	4,278	3,143	5,187	14,552	14,119	12,817	6,098
9 AM	20,657	22,241	20,083	24,741	11,605	6,504	4,733	7,987	23,656	22,666	19,431	10,147
10 AM	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
6 PM	38,347	40,213	32,476	37,378	15,226	10,973	8,799	12,778	42,074	39,199	35,591	17,835
7 PM	40,527	42,993	34,312	39,423	15,999	11,418	9,152	12,367	44,370	42,903	38,532	18,710
8 PM	44,165	50,142	41,021	45,045	18,408	13,252	9,914	13,304	52,461	50,174	41,983	19,585
9 PM	46,796	56,013	48,953	54,876	21,285	15,151	11,217	14,705	60,954	57,188	45,225	21,762
10 PM	43,313	54,847	49,331	55,659	20,708	16,189	11,543	13,590	57,879	55,610	43,821	21,196
11 PM	34,901	48,702	44,590	52,413	18,033	14,565	10,380	11,061	49,182	51,393	41,291	21,000

All Assignment Submission Times
by Weekday/Hour

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
12 AM	10,228	16,400	18,043	17,588	16,908	18,888	11,274
1 AM	4,422	7,573	7,834	8,032	7,741	9,128	4,721
2 AM	2,662	3,981	3,592	3,951	3,968	4,691	2,597
3 AM	1,822	2,229	2,183	2,248	2,383	2,754	1,704
4 AM	1,414	2,917	1,613	1,718	1,890	2,140	1,224
5 AM	1,551	2,942	1,987	2,181	2,169	2,453	1,397
6 AM	2,163	5,103	4,336	4,072	4,027	4,366	2,222
7 AM	3,254	12,029	9,635	10,632	9,318	9,712	4,121
8 AM	5,737	23,795	20,314	21,977	20,196	22,732	8,762
9 AM	9,332	36,521	32,206	32,705	32,218	36,689	14,780
10 AM	12,867	44,620	40,878	40,435	40,984	47,692	21,095
11 AM	16,949	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	27,245
9 PM	69,617	91,741	70,752	73,072	61,887	49,669	37,387
10 PM	68,692	88,432	65,970	69,229	60,490	51,417	39,456
11 PM	61,639	75,807	55,596	59,464	51,926	54,722	38,357

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) PostgresSQL clients should support the data, but pgAdmin is not supported.

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.

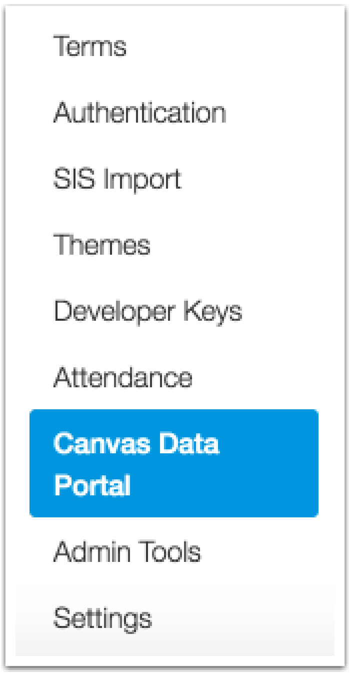
Note: Any Canvas admin in your account can view the Canvas Data Portal link, but unless they have been granted access by the Canvas Data Administrator, they cannot view the page content.

The Canvas Data Portal allows the Canvas Data Administrator to:

- view recent data exports
- view current users
- manage IP address whitelist
- generate credentials for Redshift

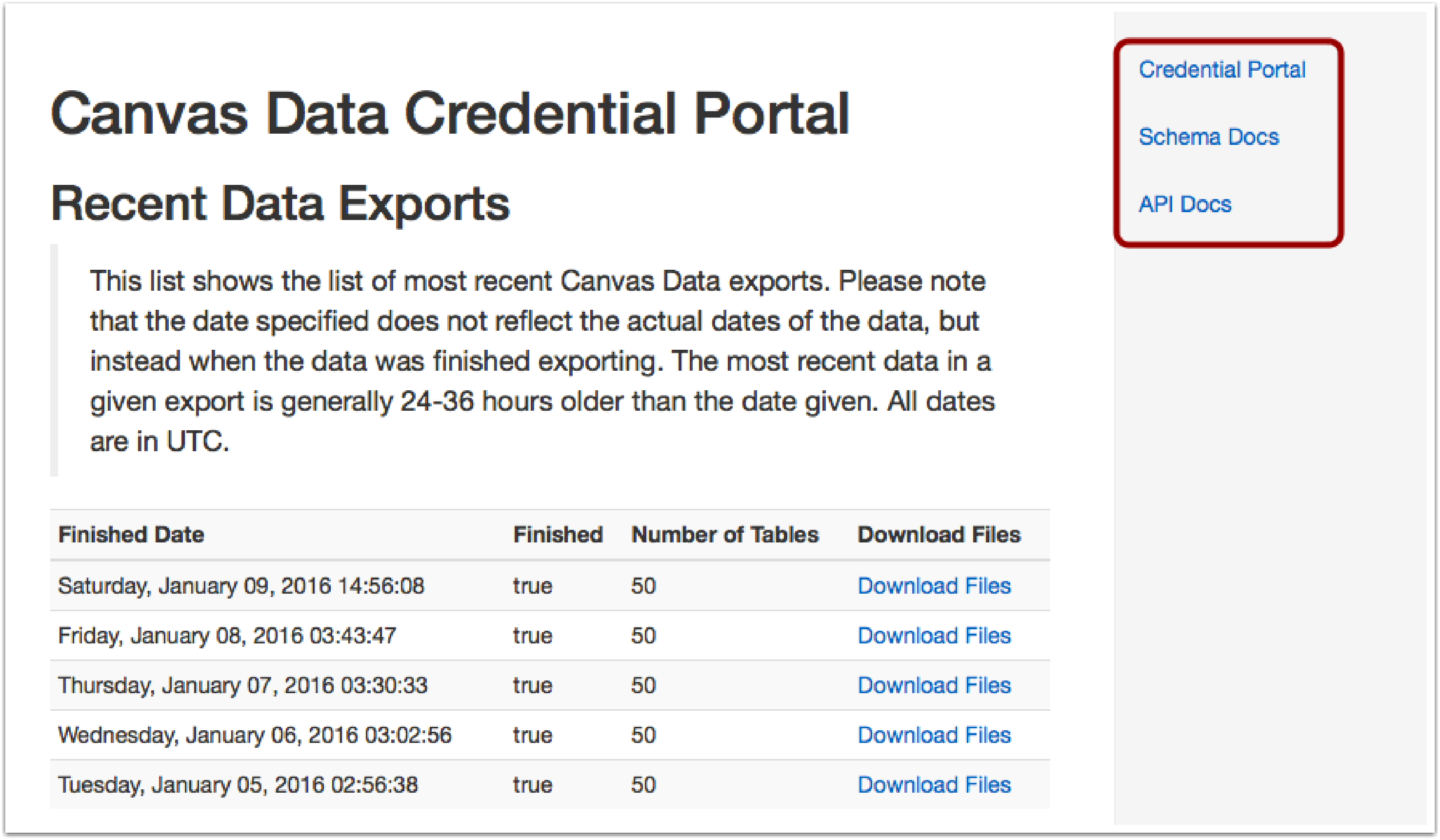
- generate credentials for Canvas Data API access (used for downloading flat files)

Open Canvas Data Portal



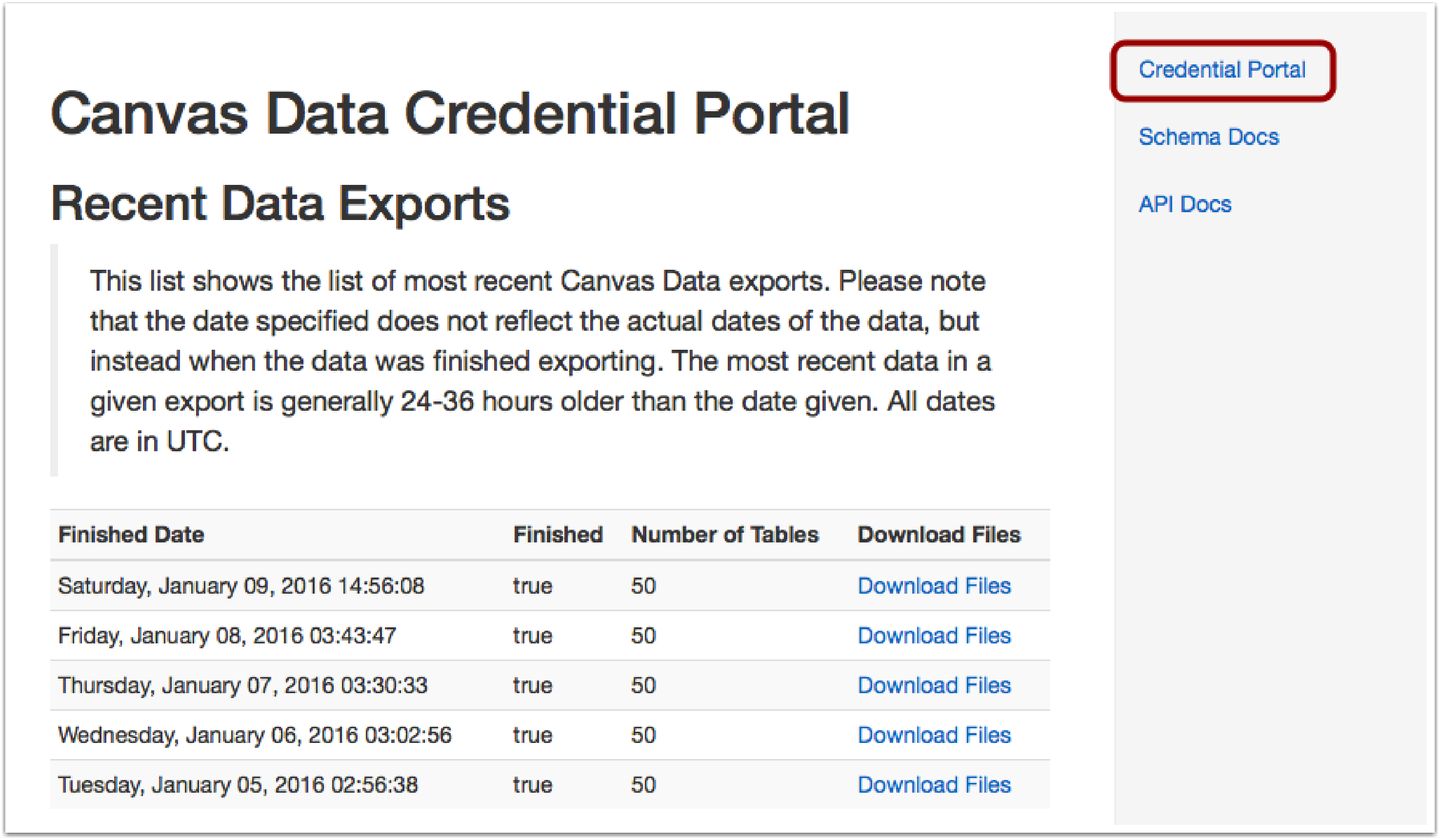
In Account Navigation, click the **Canvas Data Portal** link.

View Canvas Data Portal



The Canvas Data Portal allows you to manage Canvas Data. The portal options are in the sidebar and include three sections: Credential Portal, Schema Docs, and API Docs.

View Credential Portal



Canvas Data Credential Portal

Recent Data Exports

> This list shows the list of most recent Canvas Data exports. Please note that the date specified does not reflect the actual dates of the data, but instead when the data was finished exporting. The most recent data in a given export is generally 24-36 hours older than the date given. All dates are in UTC.

Finished Date	Finished	Number of Tables	Download Files
Saturday, January 09, 2016 14:56:08	true	50	Download Files
Friday, January 08, 2016 03:43:47	true	50	Download Files
Thursday, January 07, 2016 03:30:33	true	50	Download Files
Wednesday, January 06, 2016 03:02:56	true	50	Download Files
Tuesday, January 05, 2016 02:56:38	true	50	Download Files

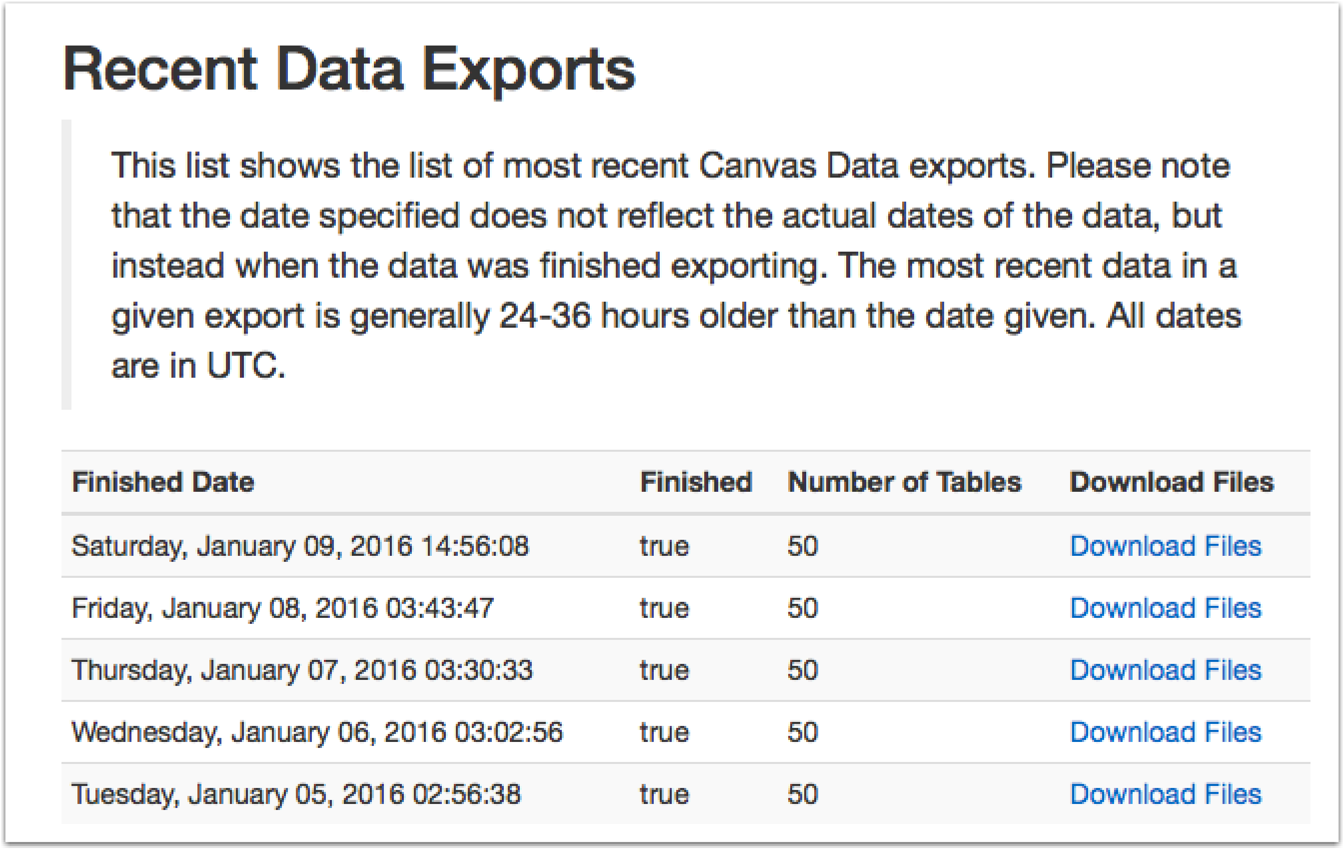
Credential Portal

Schema Docs

API Docs

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



Recent Data Exports

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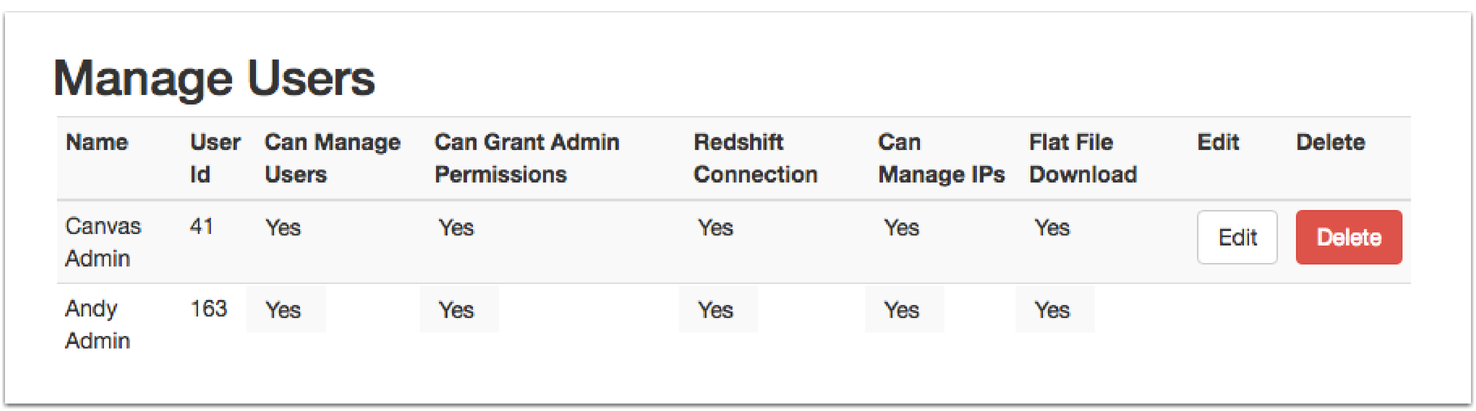
Wednesday, January 06, 2016 03:02:56	true	50	Download Files
Tuesday, January 05, 2016 02:56:38	true	50	Download Files

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.

View Users



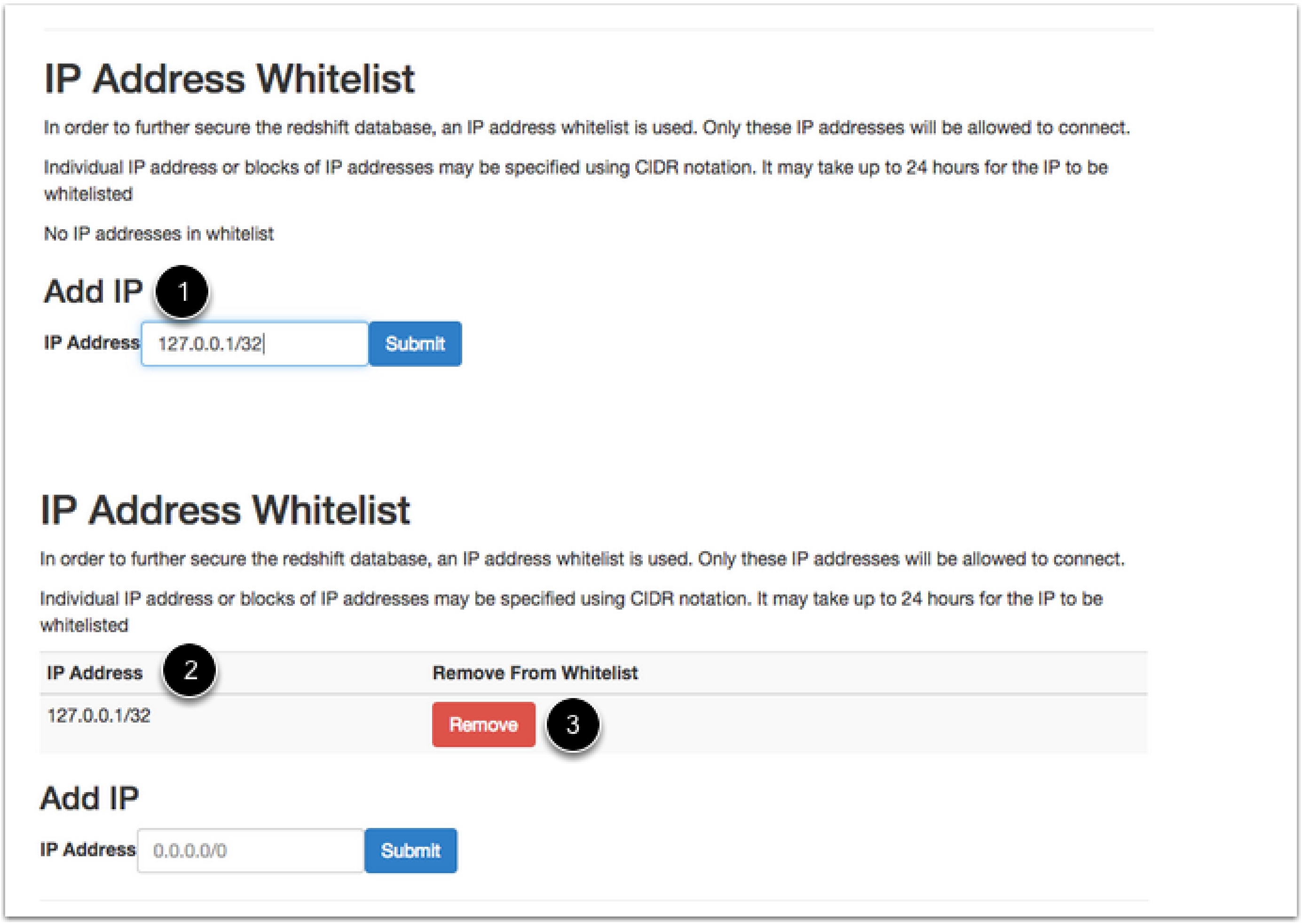
Manage Users

Name	User Id	Can Manage Users	Can Grant Admin Permissions	Redshift Connection	Can Manage IPs	Flat File Download	Edit	Delete
Canvas Admin	41	Yes	Yes	Yes	Yes	Yes	Edit	Delete
Andy Admin	163	Yes	Yes	Yes	Yes	Yes		

The Current 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 IP Address Whitelist

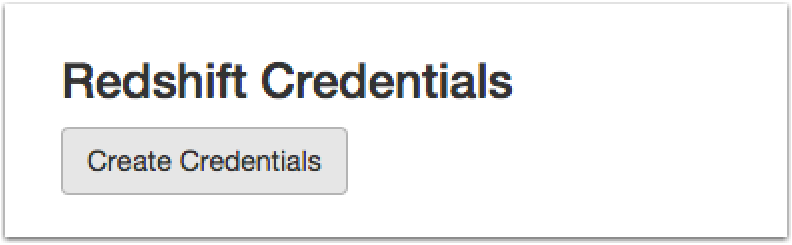


If your account allows you to access Redshift, you can manage the IP Addresses that can be used to connect to the database.

To add an IP, locate the Add IP heading [1]. In the IP Address field, enter the IP Address, then click the **Submit** button.

The IP Address appears as a new line item in the whitelist [2]. To remove the address, click the **Remove** button [3].

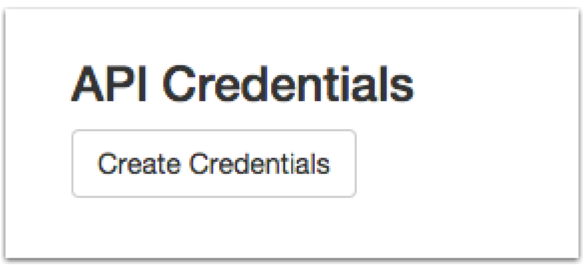
View Redshift Server Info



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 API Credentials

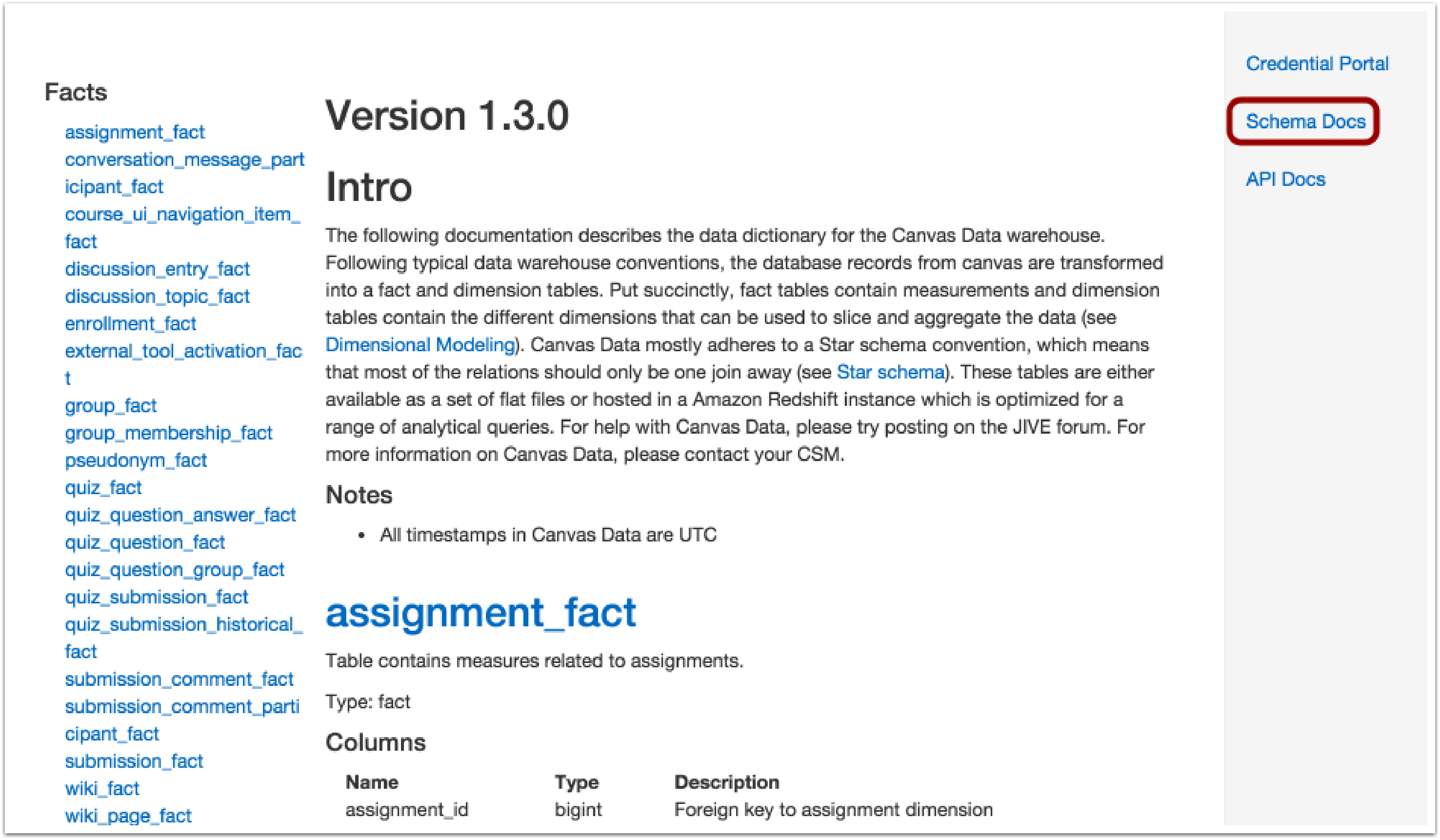


If you would like to grant access to other users or third-party partners to automatically download data, you can generate API credentials and pass them to those users. To generate the credentials, click the **Create Credentials** button.

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.

View Schema Docs



Facts

- assignment_fact
- conversation_message_participant_fact
- course_ui_navigation_item_fact
- discussion_entry_fact
- discussion_topic_fact
- enrollment_fact
- external_tool_activation_fact
- group_fact
- group_membership_fact
- pseudonym_fact
- quiz_fact
- quiz_question_answer_fact
- quiz_question_fact
- quiz_question_group_fact
- quiz_submission_fact
- quiz_submission_historical_fact
- submission_comment_fact
- submission_comment_participant_fact
- submission_fact
- wiki_fact
- wiki_page_fact

Version 1.3.0

Intro

The following documentation describes the data dictionary for the Canvas Data warehouse. Following typical data warehouse conventions, the database records from canvas are transformed into a fact and dimension tables. Put succinctly, fact tables contain measurements and dimension tables contain the different dimensions that can be used to slice and aggregate the data (see Dimensional Modeling). Canvas Data mostly adheres to a Star schema convention, which means that most of the relations should only be one join away (see Star schema). These tables are either available as a set of flat files or hosted in a Amazon Redshift instance which is optimized for a range of analytical queries. For help with Canvas Data, please try posting on the JIVE forum. For more information on Canvas Data, please contact your CSM.

Notes

- All timestamps in Canvas Data are UTC

assignment_fact

Table contains measures related to assignments.

Type: fact

Columns

Name	Type	Description
assignment_id	bigint	Foreign key to assignment dimension

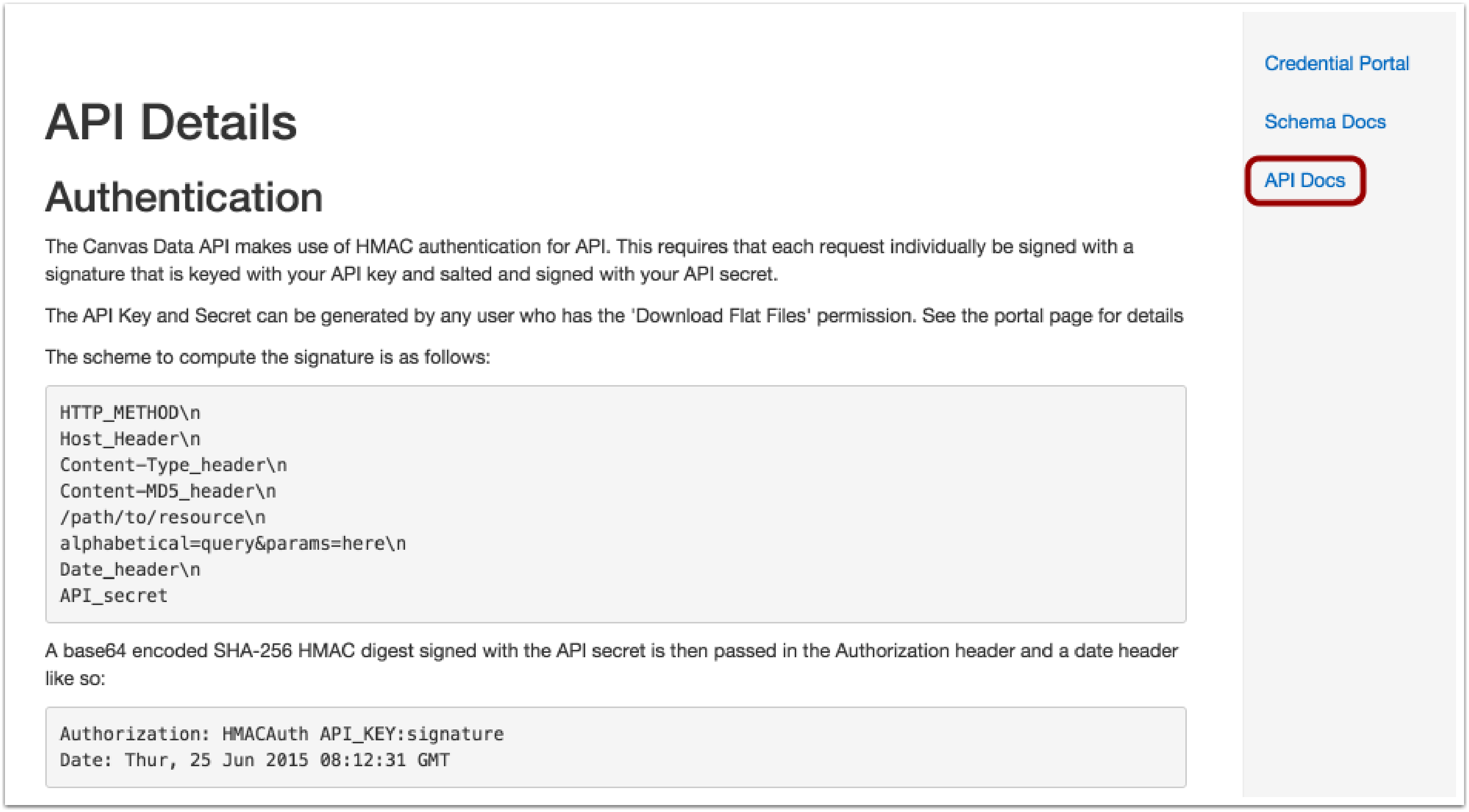
Credential Portal

Schema Docs

API Docs

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

View API Docs



API Details

Authentication

The Canvas Data API makes use of HMAC authentication for API. This requires that each request individually be signed with a signature that is keyed with your API key and salted and signed with your API secret.

The API Key and Secret can be generated by any user who has the 'Download Flat Files' permission. See the portal page for details

The scheme to compute the signature is as follows:

```
HTTP_METHOD\n
Host_Header\n
Content-Type_header\n
Content-MD5_header\n
/path/to/resource\n
alphabetical=query&params=here\n
Date_header\n
API_secret
```

A base64 encoded SHA-256 HMAC digest signed with the API secret is then passed in the Authorization header and a date header like so:

```
Authorization: HMACAuth API_KEY:signature
Date: Thur, 25 Jun 2015 08:12:31 GMT
```

Credential Portal

Schema Docs

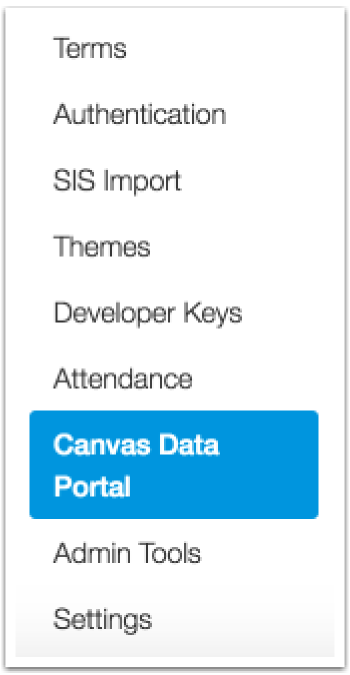
API Docs

The API Docs show all the API calls you can use for Canvas Data.

How do I manage Canvas Data admin users?

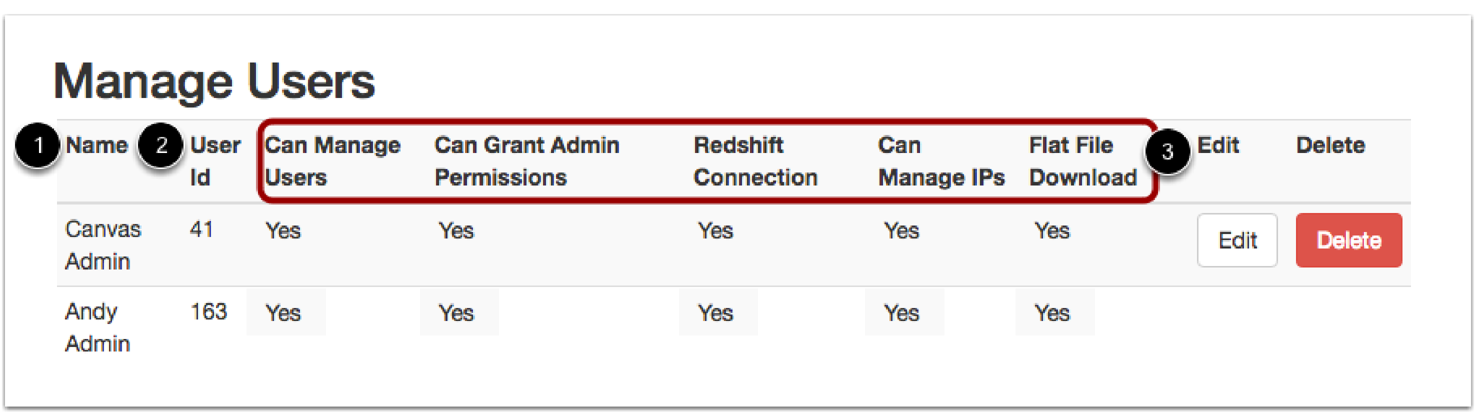
In the Canvas Data Portal, the Current Users section shows admins who have been given access to the Canvas Data Portal, along with their permissions. You can edit permissions for existing admins, add new admins, and delete admins.

Open Canvas Data Portal



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

View Users

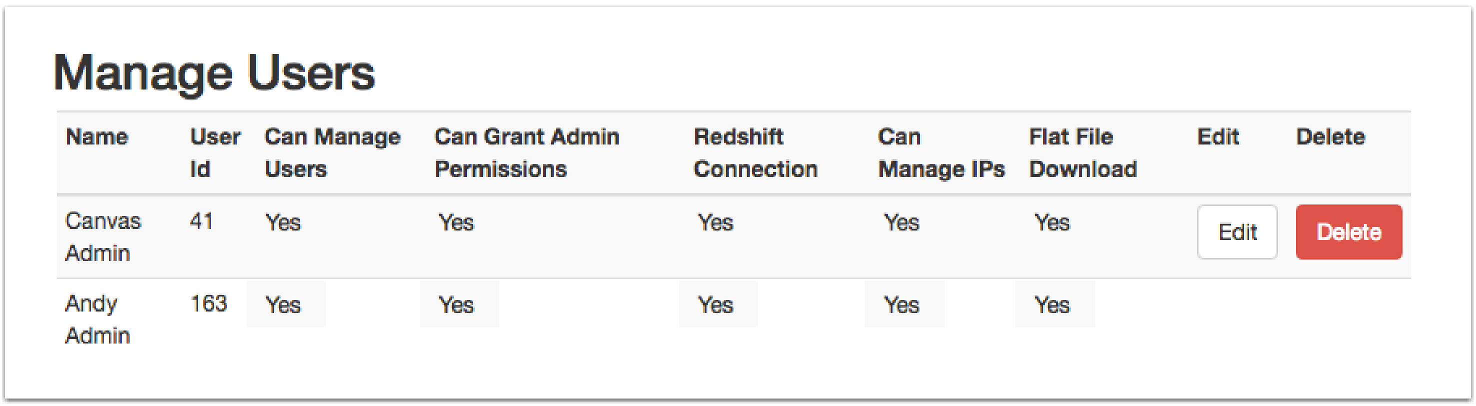


In the Credentials Portal, you can view the users who has been given access to the Canvas Data Portal.

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], as well as up to five permissions [3]. Permissions are based on your institution's Canvas Data subscription.

View Permissions



Manage Users

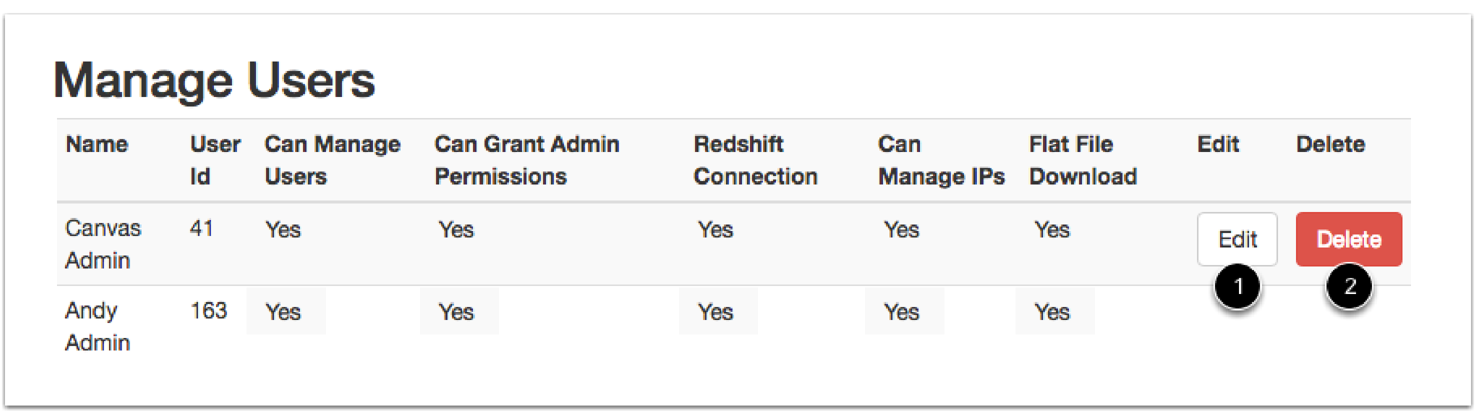
Name	User Id	Can Manage Users	Can Grant Admin Permissions	Redshift Connection	Can Manage IPs	Flat File Download	Edit	Delete
Canvas Admin	41	Yes	Yes	Yes	Yes	Yes	Edit	Delete
Andy Admin	163	Yes	Yes	Yes	Yes	Yes		

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:

- **Can Manage Users** [1]—can add other Canvas Data users for the account
- **Can Grant Admin Permissions** [2]—can allow Canvas Data users to add other Canvas Data users
- **Can Connect to Redshift** [3]—can generate credentials to connect to Redshift (hosted accounts)
- **Can Manage IP Address Whitelist** [4]—can manage the IP whitelist (hosted accounts)
- **Can Download Flat Files** [5]—can download flat files from Canvas Data

Manage Users

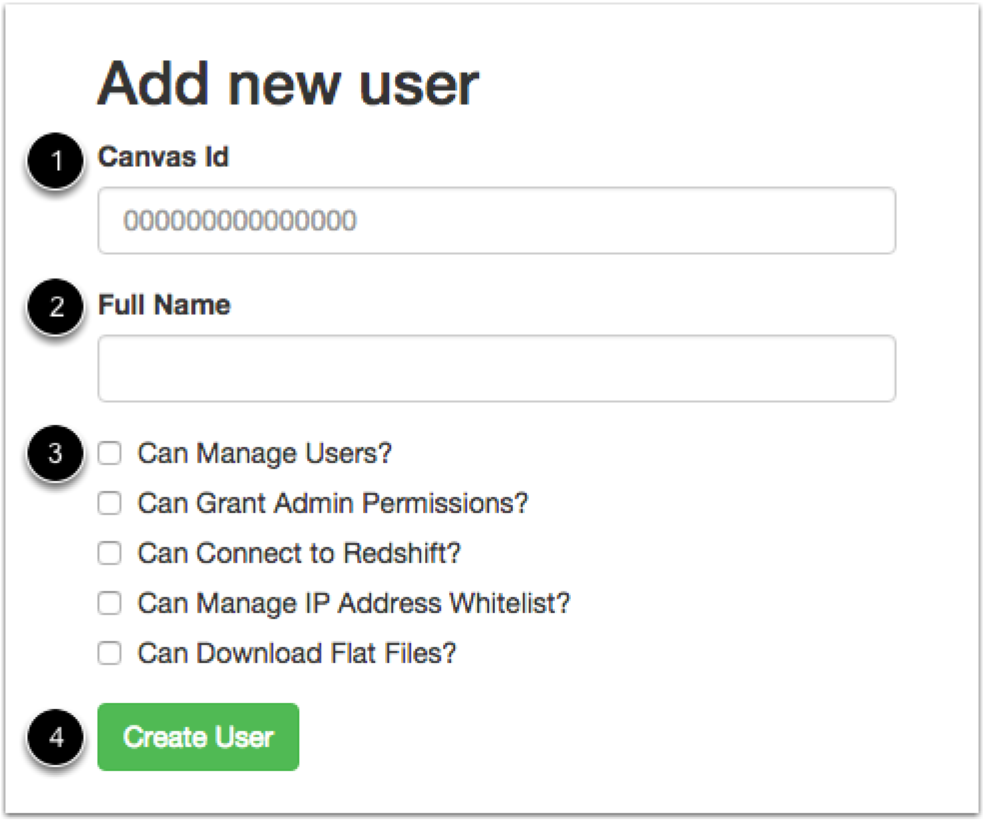


Manage Users

Name	User Id	Can Manage Users	Can Grant Admin Permissions	Redshift Connection	Can Manage IPs	Flat File Download	Edit	Delete
Canvas Admin	41	Yes	Yes	Yes	Yes	Yes	Edit	Delete
Andy Admin	163	Yes	Yes	Yes	Yes	Yes		

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

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 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.

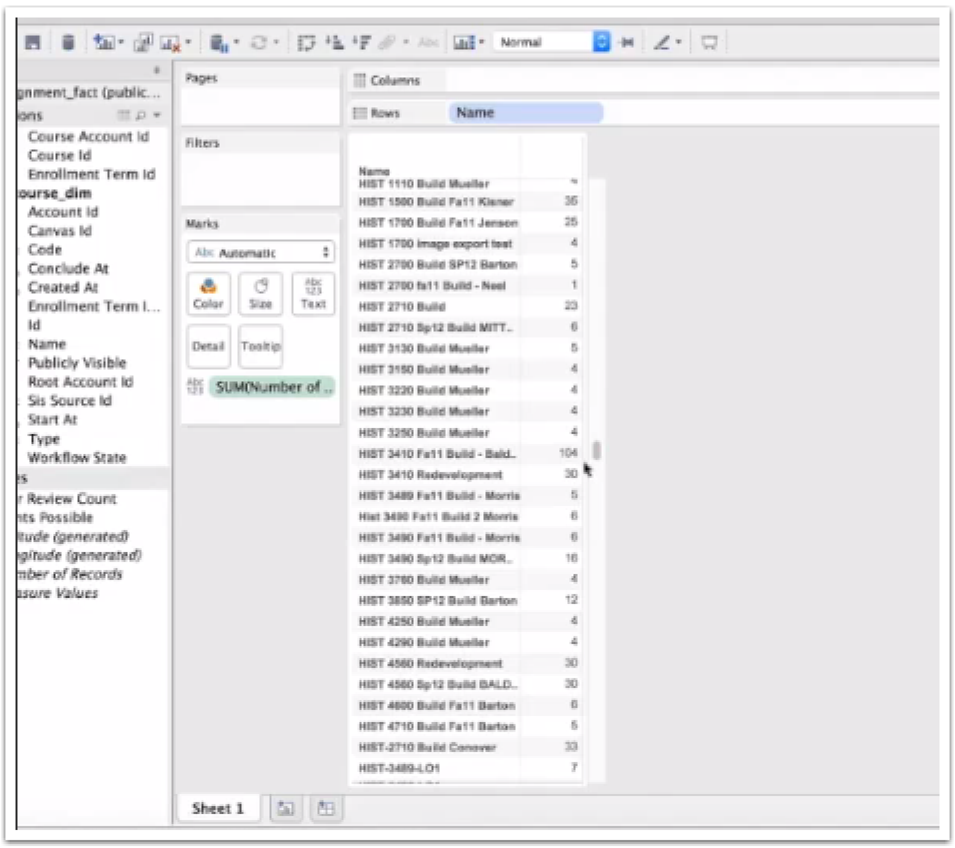
For full Canvas Data use, data files should live in a database. Once you have downloaded your institution's flat files, table headers must be added to the files before analysis can be run through your preferred database.

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.

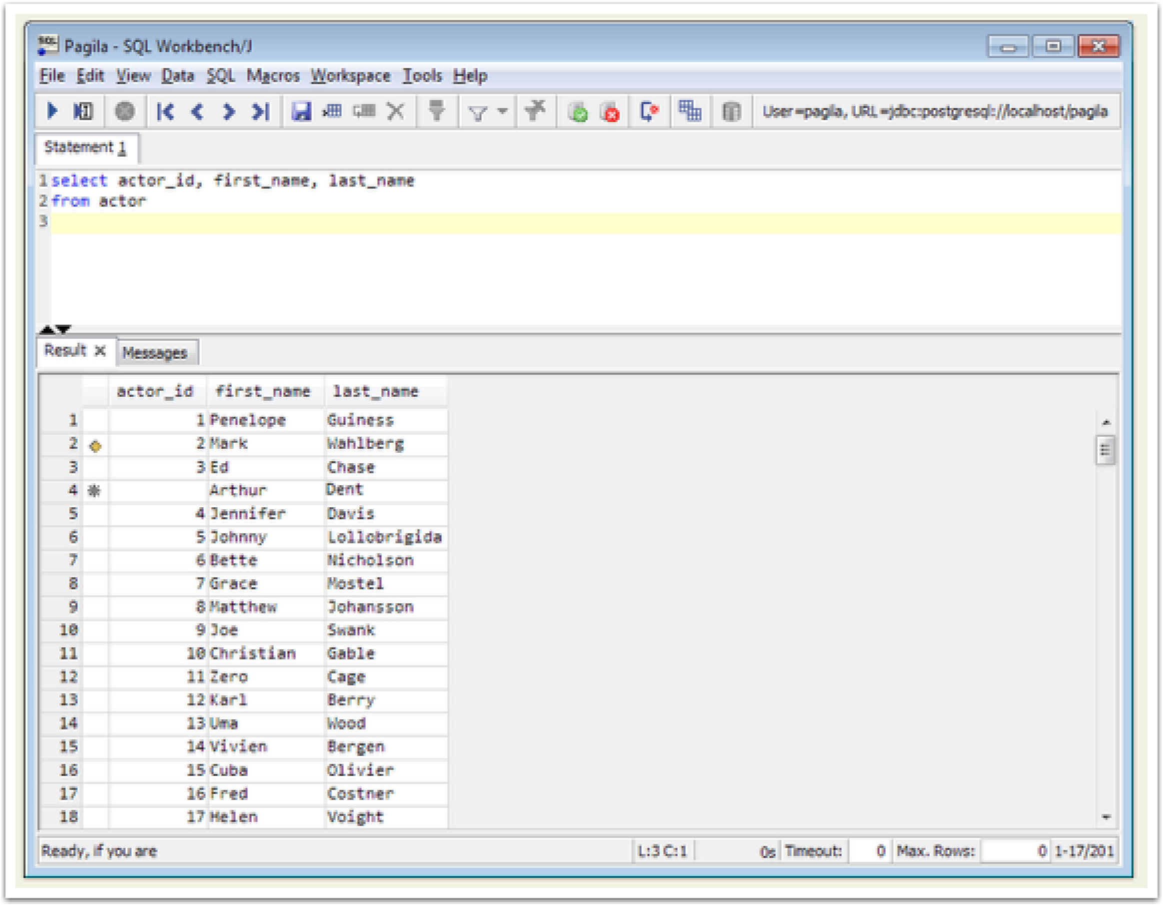
Tableau



[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 Tableu, 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

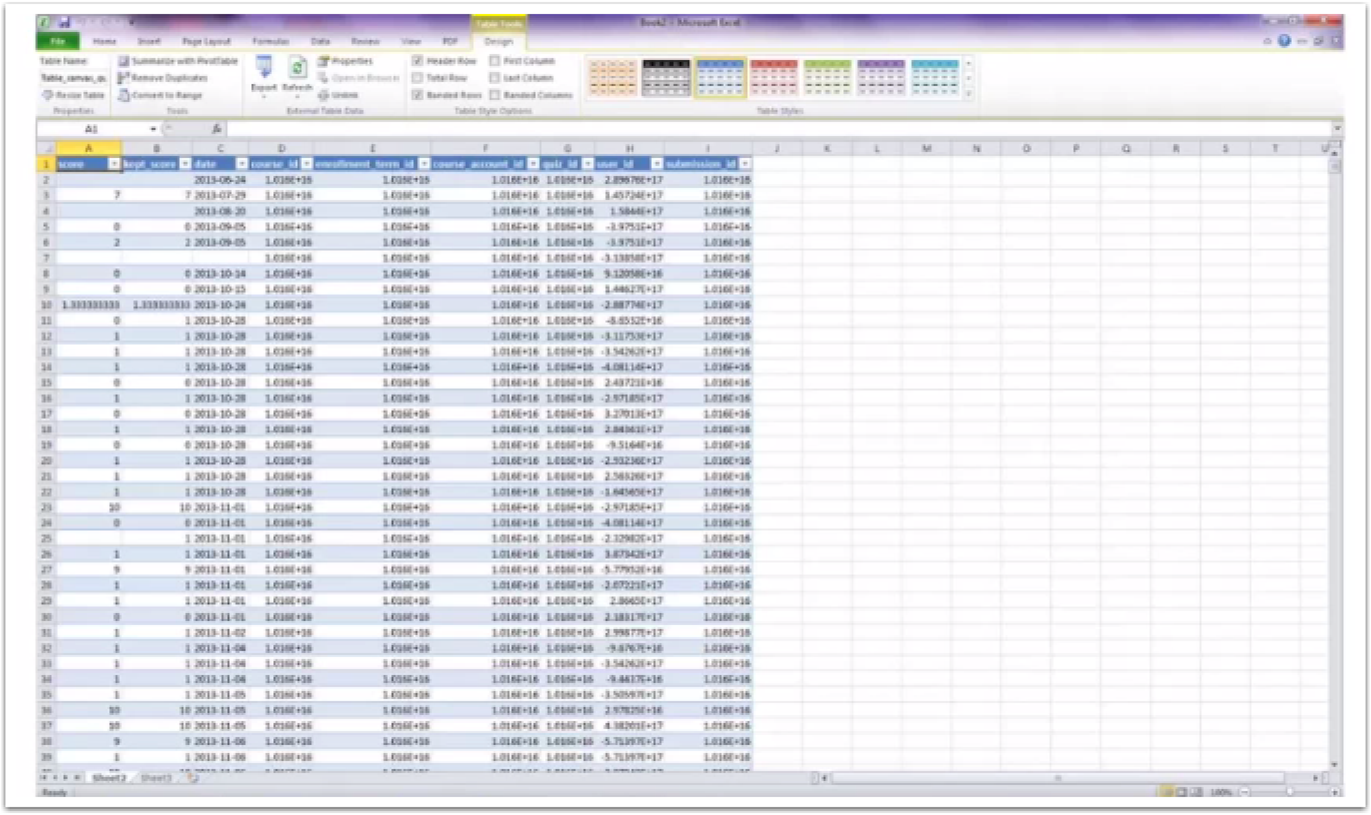


SQL Workbench/J is a free cross-platform SQL query tool that operates on Java. For more information about SQL Workbench/J, please see the Amazon SQL Workbench/J documentation.

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



[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

```
quire(redshift)
<- redshift.connect(
jdbc:postgresql://xxx-redshift.beta.inshosteddata.com:5439/canvas",
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) PostgresSQL clients should be supported by Canvas Data. However, please notes that pgAdmin is not supported.

Computer Specifications

What are the basic computer specifications for Canvas?

This is a list of basic computer system requirements to use Canvas. It is always recommended to use the most up-to-date versions and better connections. Canvas will still run with the minimum specifications, but you may experience slower loading times. Learn more about browser requirements.

Canvas and its hosting infrastructure are designed for maximum compatibility and minimal requirements.

Screen Size

Canvas is best viewed at a minimum of 800x600, which is the average size of a notebook computer. If you want to view Canvas on a device with a smaller screen, we recommend using the Canvas mobile app.

Operating Systems

- Windows 7 and newer
- Mac OSX 10.6 and newer
- Linux - chromeOS

Mobile Operating System Native App Support

- iOS 7 and newer
- Android 4.2 and newer

Computer Speed and Processor

- Use a computer 5 years old or newer when possible
- 1GB of RAM
- 2GHz processor

Internet Speed

- Along with compatibility and web standards, Canvas has been carefully crafted to accommodate low bandwidth environments.
- Minimum of 512kbps

Screen Readers

- Macintosh: VoiceOver (latest version for Safari)
- PC: JAWS (latest version for Internet Explorer)

- PC: NVDA (latest version for Firefox)
- There is no screen reader support for Canvas in Chrome

Which browsers does Canvas support?

Because it's built using web standards, Canvas runs on Windows, Mac, Linux, iOS, Android, or any other device with a modern web browser. Learn more about basic computer specifications.

Supported Browsers

Canvas supports the current and first previous major releases of the following browsers:

- Internet Explorer and Microsoft Edge
- Chrome
- Safari
- Firefox (please note Extended Releases are not supported)
- Respondus Lockdown Browser

We highly recommend updating to the most current version of your preferred browser. Your browser will notify you if there is a new version available.

Some supported browsers may still produce a banner stating *Your browser does not meet the minimum requirements for Canvas*. If you have upgraded your browser but you are still seeing the warning banner, try logging out of Canvas and deleting your browser cookies. Learn how to clear your cache on a Mac or a PC.

Required Components

Flash is required for recording or viewing audio/videoas well as uploading files to a course or an assignment. Other than these features, Flash is not required to use most areas of Canvas. Please note that some browsers may no longer support Flash.

The Java plug-in is required for screen sharing in Conferences. Please note that some browsers do not support Java. Otherwise, there are no other browser plug-ins used by Canvas.

JavaScript must be enabled to run Canvas.

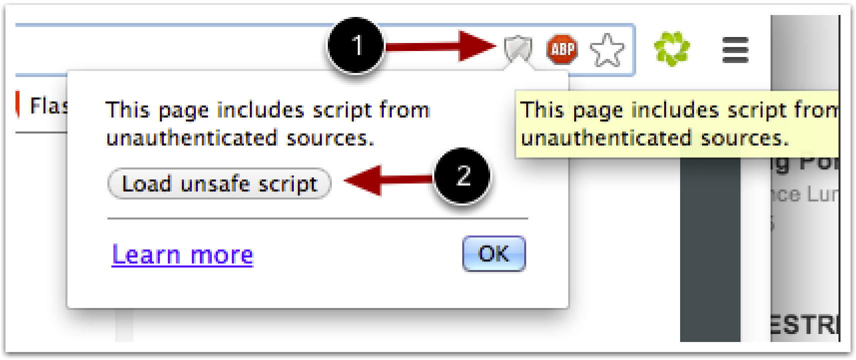
Browser Privacy Settings

Some browsers may occasionally make modifications to privacy settings to protect users from possible unsecured content. Unsecured content is identified with the prefix http:// in the URL and can create mixed content in your Canvas Page. Secured content is identified with the https:// prefix in the URL. Please note that if you embed Canvas lessons inside your course, you can prevent browser issues with mixed content using secured Canvas Guides URLs.

We recommend following any browser security policies established by your institution, especially if you are using Canvas on a computer provided by your institution. You may want to use Canvas in an alternative browser instead.

If you are using a browser that is affected, please be aware of possible restrictions. The following are known issues in specific browsers that may block or create mixed content within Canvas.

Chrome Security



Google Chrome verifies that the website content you view is transmitted securely. If you visit a page in your Canvas course that is linked to insecure content, Chrome will display a shield icon [1] in the browser address bar.

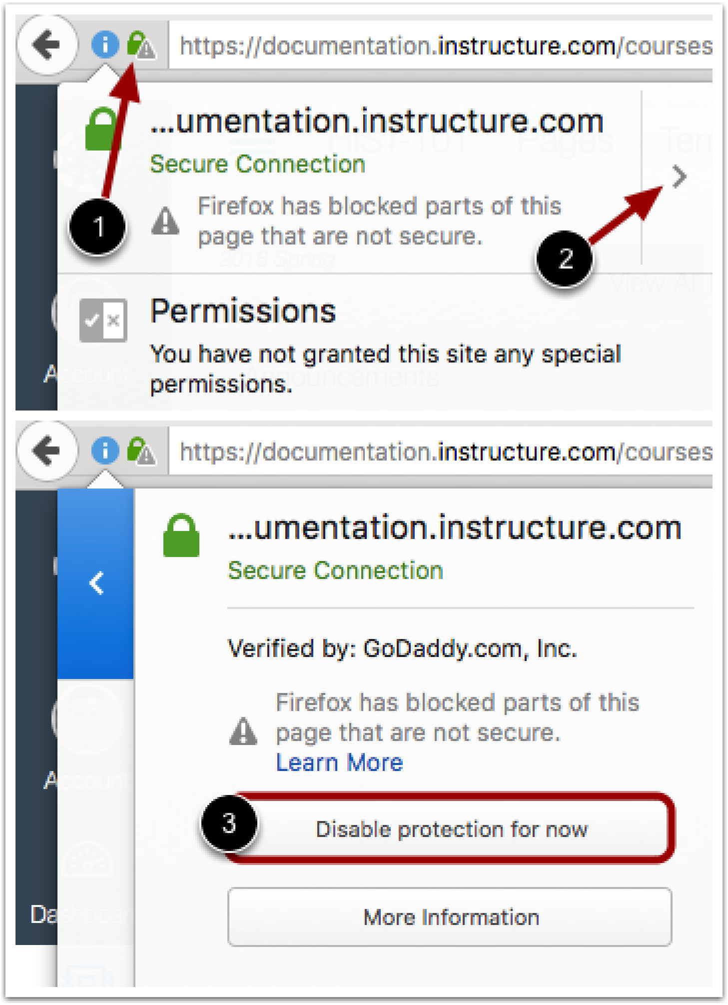
You can choose to override the security restriction and display the content anyway by clicking the shield icon and then clicking the **Load unsafe script** button [2].

Chrome Media Permissions

Chrome has its own media permission within the browser. To use your computer camera and microphone within any Canvas feature, you will have to approve two permissions:

1. Allow access to Canvas via the Adobe Flash Player Settings [1]. This prompt appears in the center of the video and audio pop-up windows, or the center of the browser if you are accessing Conversations.
2. Allow access to Canvas via Chrome's media permission settings [2]. This prompt appears just below the address bar. Click the **Allow** button.

Firefox Security



Firefox verifies that the website content you view is transmitted securely. If you visit a page in your Canvas course that is linked to insecure content, Firefox will display a lock with a warning icon in the browser address bar [1].

You can choose to override the security restriction and display the content anyway by clicking the lock with a warning icon, clicking the arrow to expand your options [2], and selecting the **Disable protection for now** button [3].

Canvas on Mobile Devices

The Canvas interface was optimized for desktop displays, so using small form factors such as phones may not be a pleasant experience in using Canvas. Canvas is not officially supported on mobile browsers. We recommend using Canvas mobile applications for an improved user experience. At this time, Canvas apps are only available in English.

Since Canvas uses small elements of Flash, not all Canvas features may be supported on mobile devices, especially on iOS.

Mobile Browsers

Visit the Apple store or the Play store to download mobile browsers. The following major browsers are compatible with mobile devices but Canvas features may not be supported:

iOS

- Safari (default browser that opens from Canvas)
- Chrome
- Photon Flash Player (supports Flash)

Android

- Internet
- Firefox
- Chrome

Note: Android default browser varies per mobile device.

How do I clear my browser cache on a Mac?

A browser cache stores copies of web pages you visit which allows the pages to load faster. Clearing the cache helps keep pages updated with the correct information.

Safari

To learn more about clearing your cache in Safari, visit Apple Support.

1. In the Safari menu bar, click the **Safari** option.
2. Click the **Clear History** link.
3. In the Clear drop-down menu, select the time range where you want to clear browsing data.
4. Click the **Clear History** button.

Chrome

To learn more about clearing your cache in Chrome, visit Google Support.

1. On the browser toolbar, click the **Chrome** menu icon.
2. Select the **More Tools** link.
3. Select the **Clear browsing data** link.
4. In the data drop-down menu, select the time range where you want to clear browsing data.
5. Select the **Cookies and other site and plug-in data** and **Cached images and files** checkboxes.
6. Click the **Clear Browsing Data** button.

Firefox

To learn more about clearing your cache in Firefox, visit Firefox Support.

1. In the Firefox menu bar, click the **Firefox** option.
2. Select the **Preferences** link.
3. Click the **Privacy** tab.
4. Under the History heading, click the **clear your recent history** link.
5. Select the **Cache** checkbox.
6. Click the **Clear Now** button.

How do I clear my browser cache on a PC?

A browser cache stores copies of web pages you visit which allows the pages to load faster. Clearing the cache helps keep pages updated with the correct information.

Internet Explorer

To learn more about clearing your cache in Internet Explorer, visit Microsoft Support.

1. In the Internet Explorer menu bar, click the **Settings** icon.
2. Select the **Internet Options** link.
3. Under the Browsing history heading, click the **Delete** button.
4. Check the **Temporary Internet files and website files** and **Cookies and website data** checkboxes. Remove the check for the **Preserve Favorites website data** checkbox.
5. Click the **Delete** button.

Edge

To learn more about clearing your cache in Edge, visit Microsoft Support.

1. In the Edge menu bar, click the **Hub** icon.
2. To view your browsing history, click the **History** icon.
3. Click the **Clear all history** link.
4. Choose the types of data or files you want to remove. Select the **Cookies and saved website data** and **Cached data and files** checkboxes.
5. Click the **Clear** button.

Chrome

To learn more about clearing your cache in Chrome, visit Google Support.

1. In the Chrome browser toolbar, click the **Chrome menu** icon.
2. Click the **More Tools** link.
3. Click the **Clear browsing data** link.

4. Use the drop-down menu to select the time range you want to clear browsing data.
5. Clear browsing data by selecting checkboxes. Select the **Cookies and other site and plug-in data** and **Cached images and files** checkboxes.
6. Click the **Clear Browsing Data** button.

Firefox

To learn more about clearing your cache in Firefox, visit Firefox Support.

1. In the Firefox menu bar, click the **Open menu** icon.
2. Select the **Options** icon.
3. Select the **Advanced** icon, then select the **Network** tab.
4. Under the Cached Web Content heading, click the **Clear Now** button.

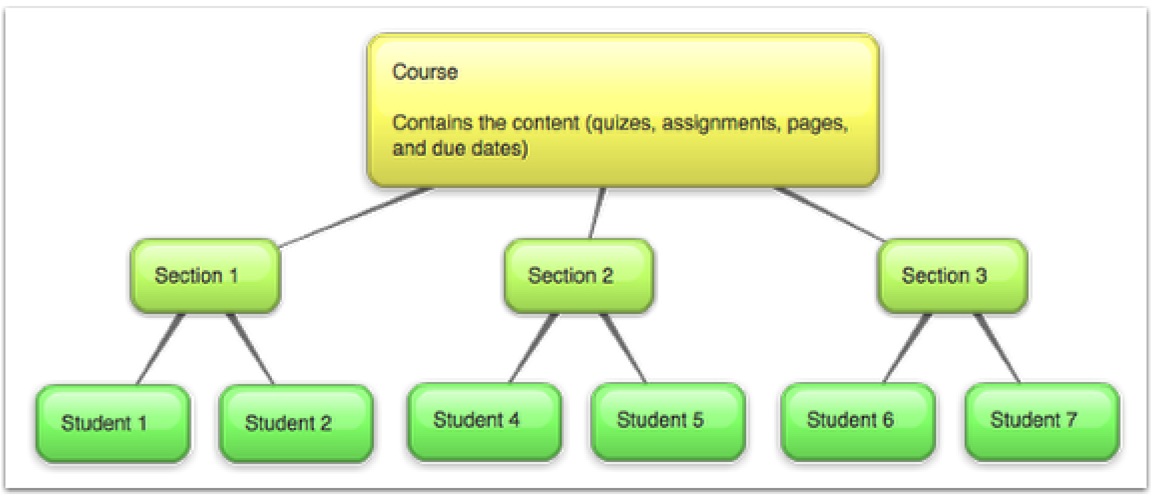
Courses and Sections

How are courses and sections related?

Courses and sections work together in Canvas. Sections help subdivide students within a course and offer section-specific options such as varied due dates for assignments, discussions, and quizzes. You can also use sections to create student groups.

Sections can be created as part of a course SIS import. You can also manually create sections as part of a course.

Courses and Sections

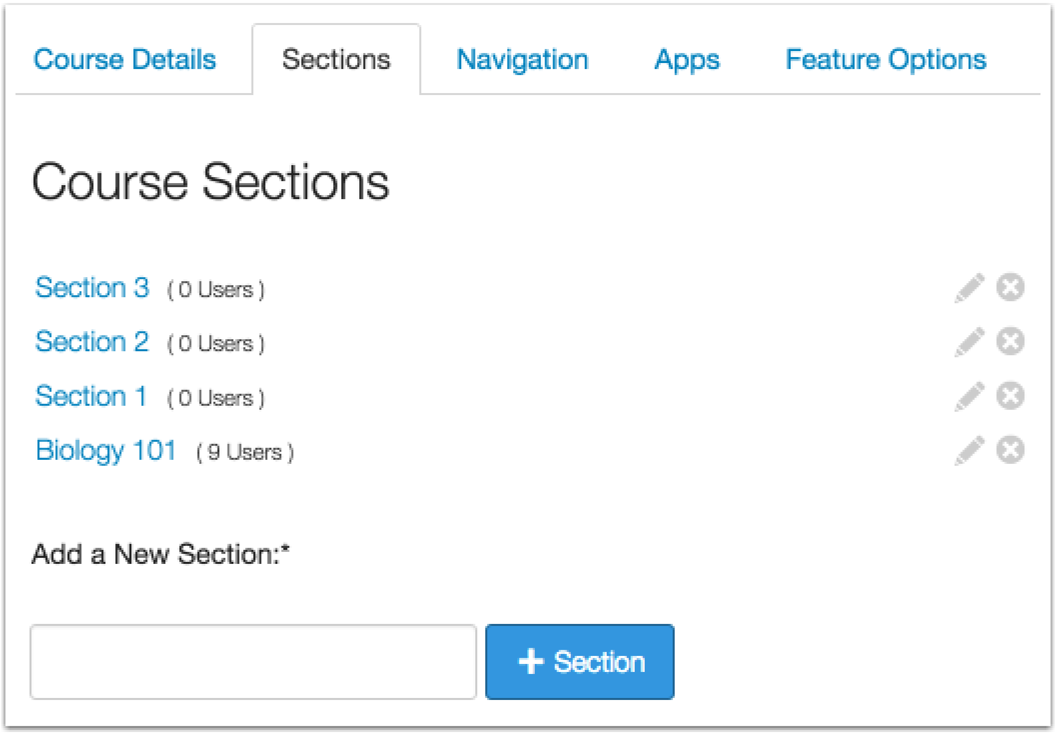


Courses are the virtual classroom where all the content resides, the place where students can learn and interact with the instructor and each other.

Sections are a group of students that have been organized for administrative purposes. 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. Examples of this feature include a course with sections that meet on different days of the week or in different formats (online vs. face-to-face).

Sections are also beneficial for TA-based grading and sorting in the Gradebook. You can also allow students to only see students in their section.

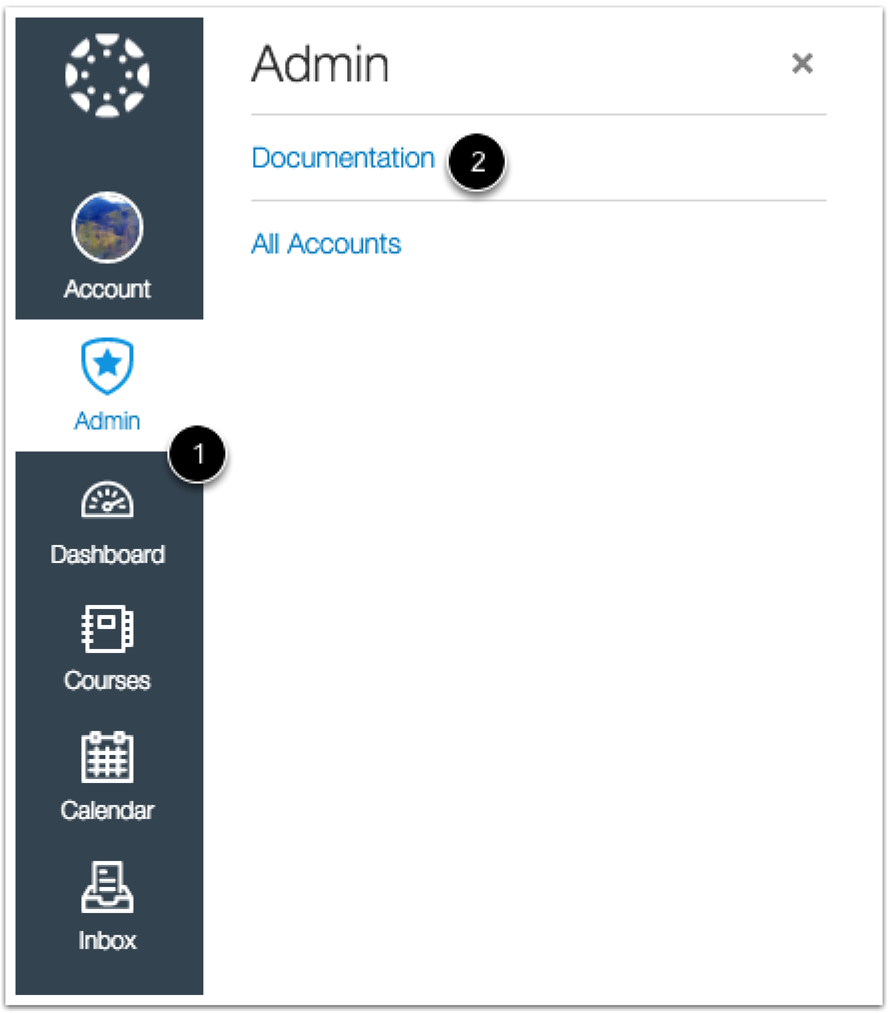
Note: Canvas users have access to all elements of the course. In other words, you can't hide content or restrict access to part of a course (i.e, content, assignments, etc.) by section, unless you create groups for each section.

How do I view the courses in an account?

You can find courses in your managed accounts in the Courses menu.

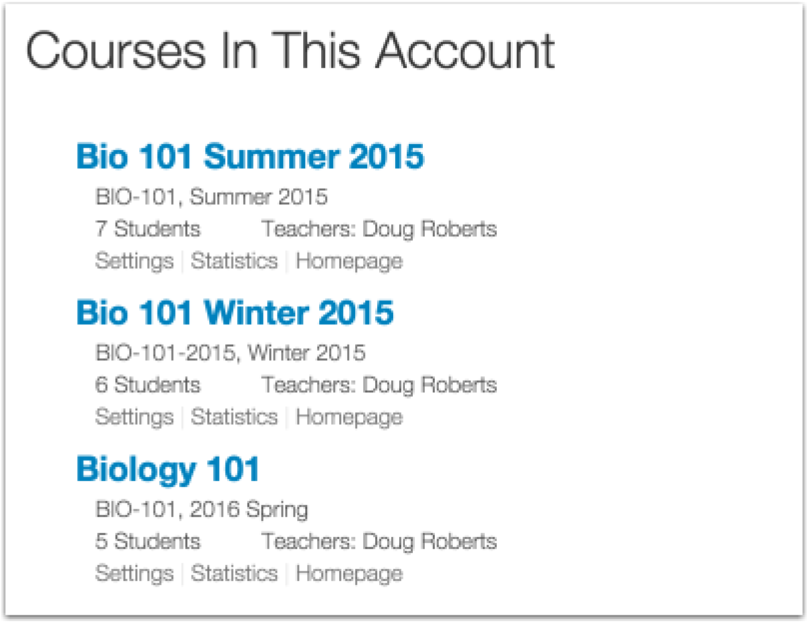
View a video about Courses

Open Account



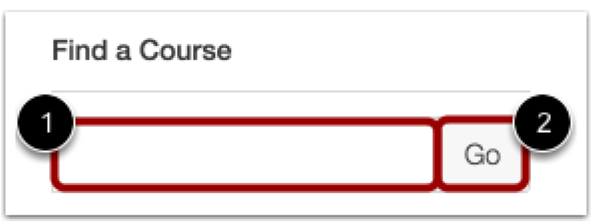
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

View Courses



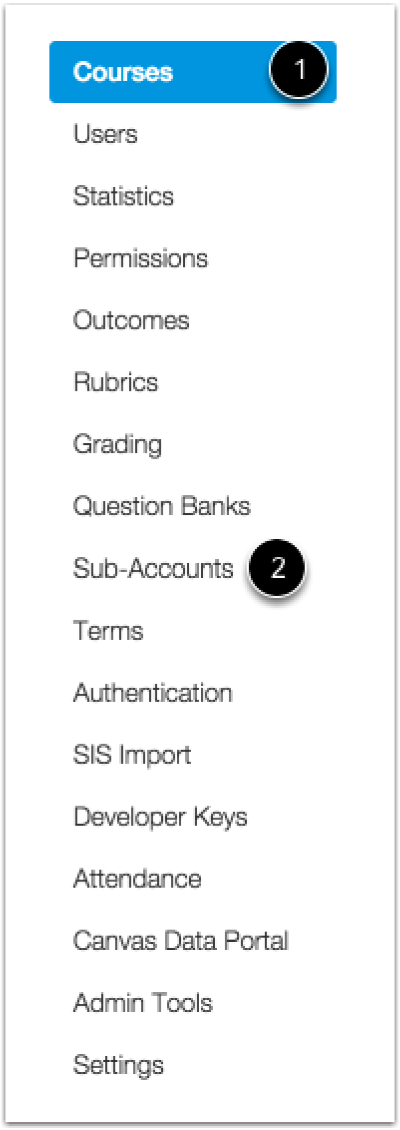
View the courses in the account.

Search for Courses



Search for courses by using the Find a Course tool. Type the course name in the course name field [1] and click the **Go** button [2].

View by Sub-Accounts



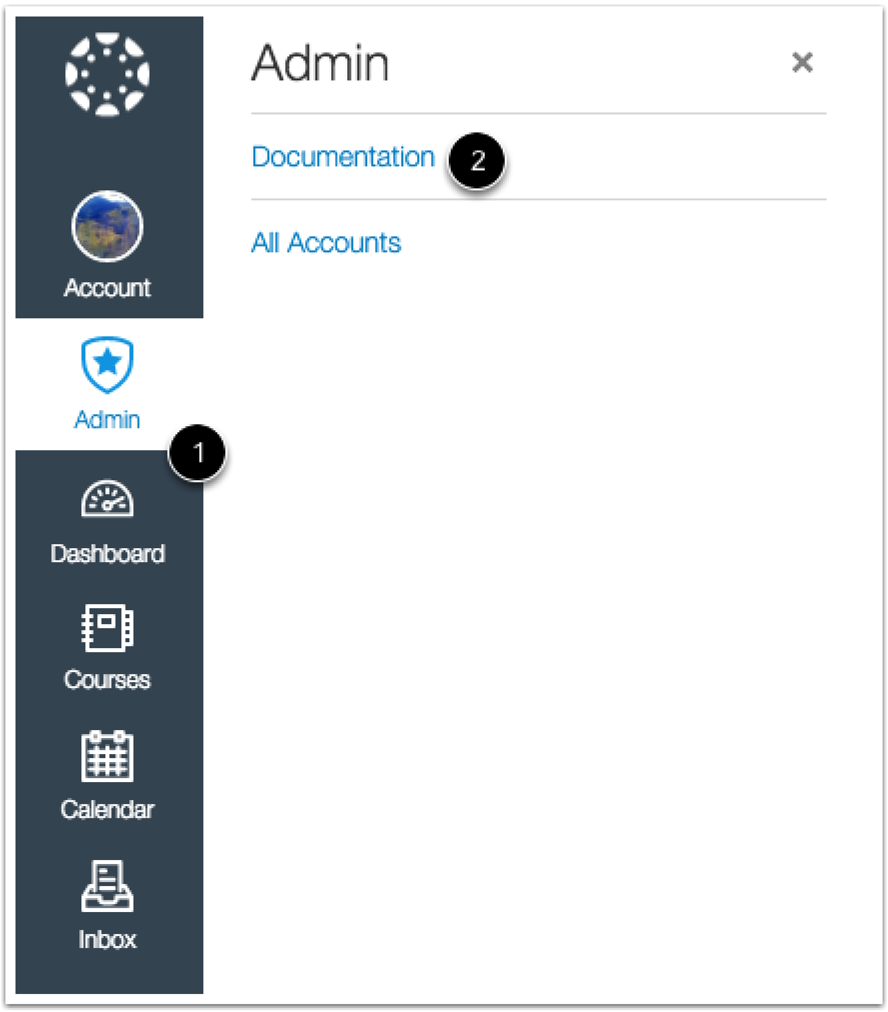
Click the **Courses** link [1] to see all the courses in the account. If you have organized courses in your account by sub-accounts, click the **Sub-Accounts** link [2] to view the sub-accounts and courses.

How do I add a course in an account?

You can add a course in your account in the Courses page.

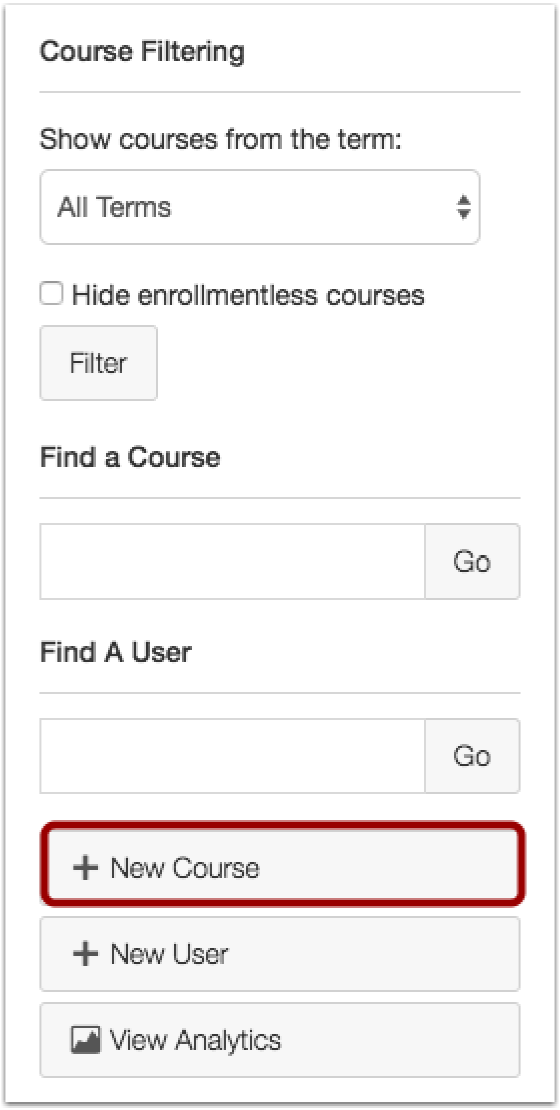
Note: Courses can also be added through SIS Imports. Courses added manually in Canvas are not linked back to any SIS data (though they could be by associating an SIS ID) and are not affected by SIS imports.

Open Account



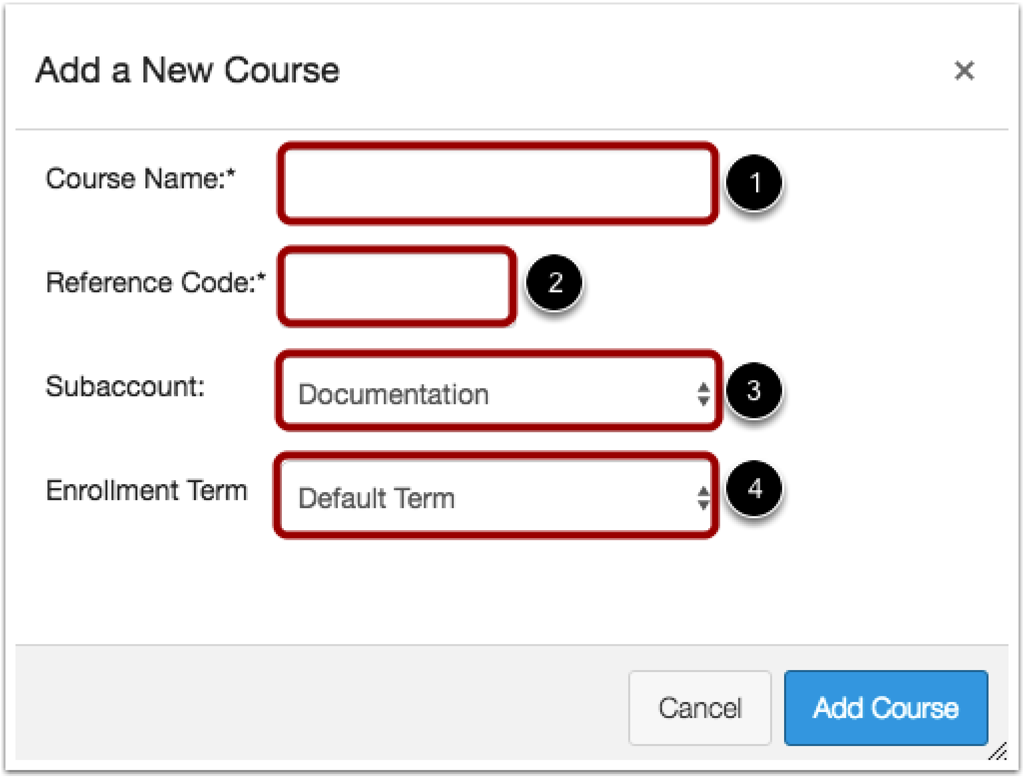
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Add New Course



Click the **Add New Course** button.

Add New 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.

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 conclude a course at the end of a term?

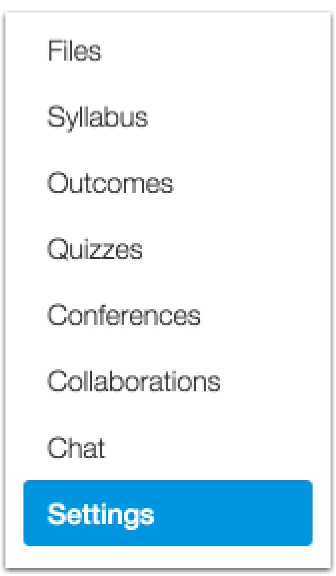
When a course is completed and you want to provide read-only access to the course, you may be able to conclude the course manually in Canvas. However, if your institution uses software that automatically concludes enrollments, you do not have to manually end your course since the end date of the course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

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.

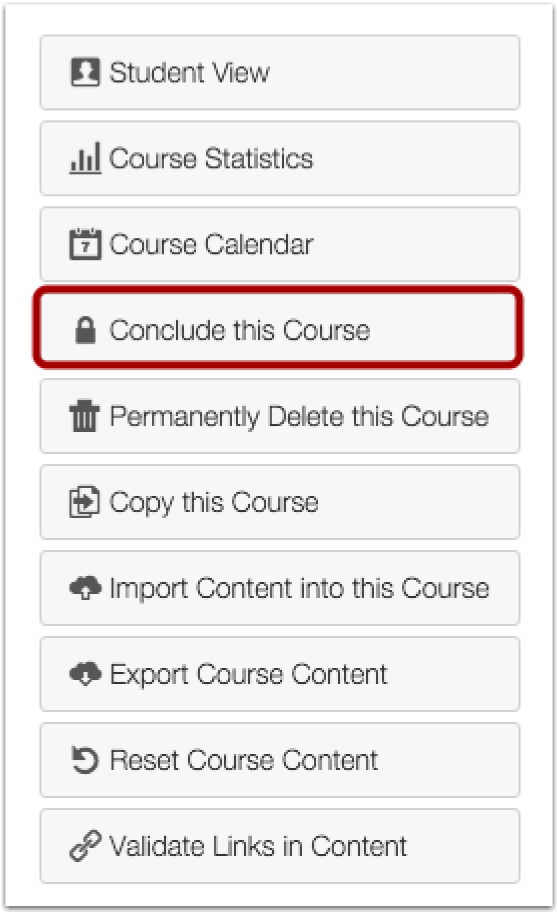
Note: Manually concluding a course is a course permission. If the Conclude this Course button does not appear in Course Settings, this setting has been restricted for your course. If you are an instructor, contact your admin for assistance.

Open Settings



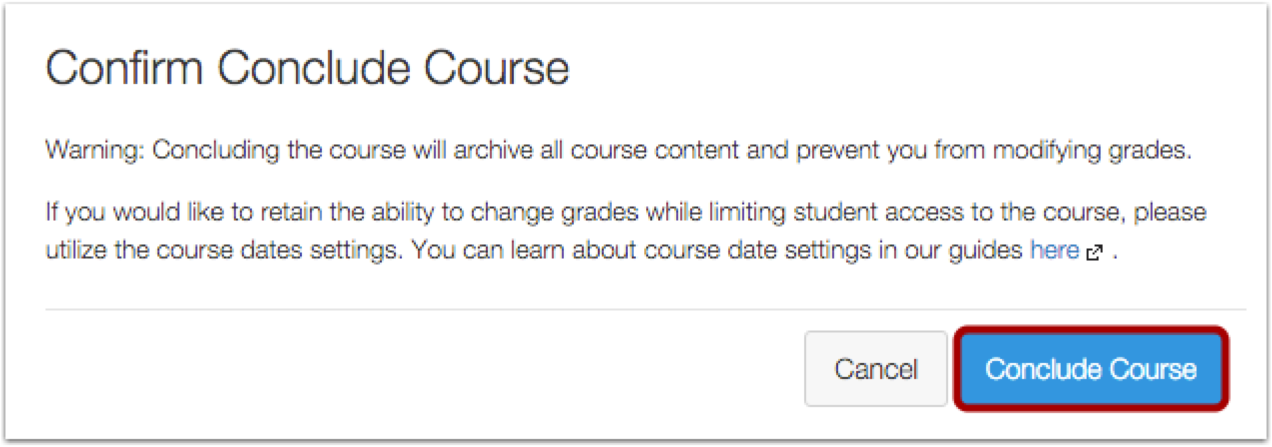
In Course Navigation, click the **Settings** link.

Conclude This Course



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

Conclude Course



Click the **Conclude Course** button.

View Confirmation

A message will appear at the top of your screen confirming the conclusion of your course.

Note: Admins can unconclude courses if necessary. If you are an instructor, please contact your admin for assistance.

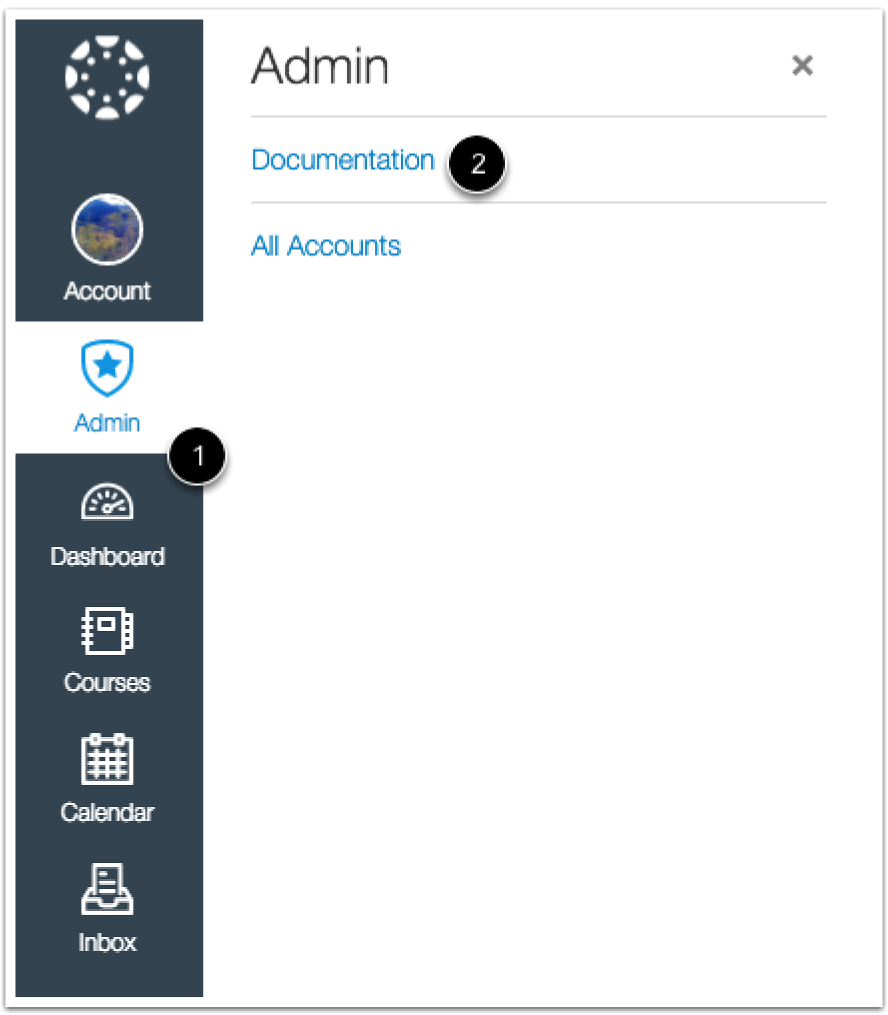
How do I delete a course in an account?

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 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.

Note: 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).

Open Account

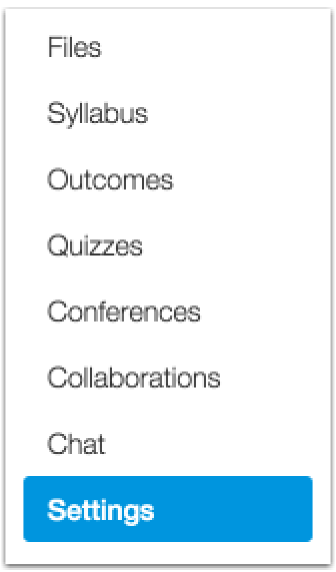


In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open the Course

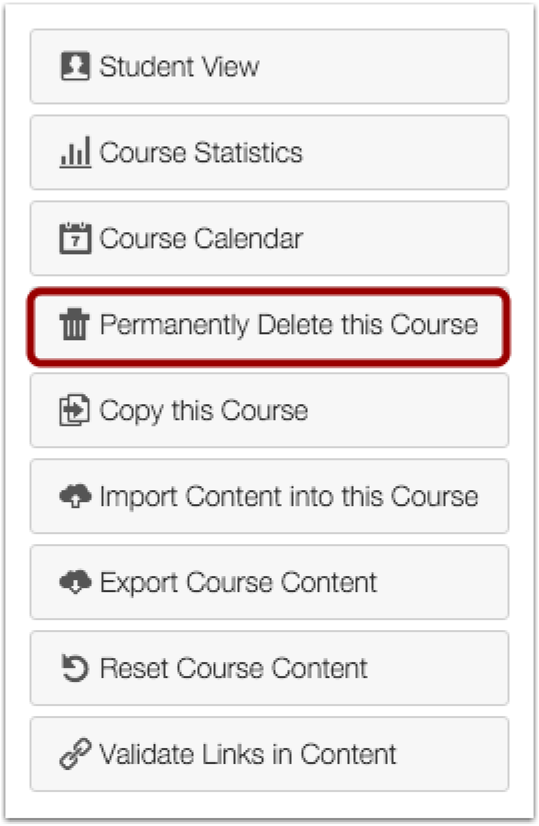
Open the course you wish to delete. You can search for it in the find a course field. You can also get to the course by typing in the course URL.

Open Settings



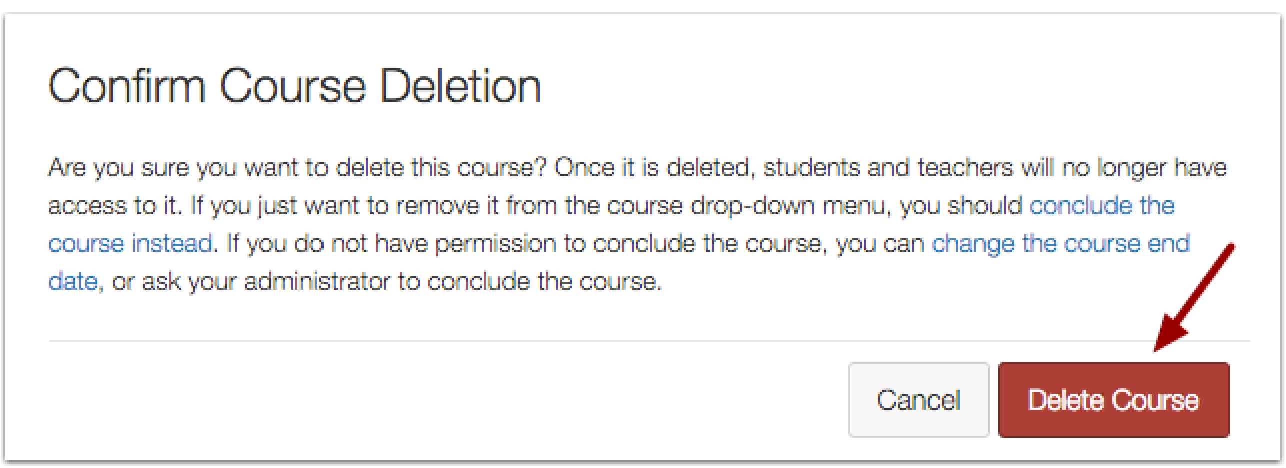
In Course Navigation, click the **Settings** link.

Permanently Delete Course



Click the **Permanently Delete this Course** button.

Confirm Deletion

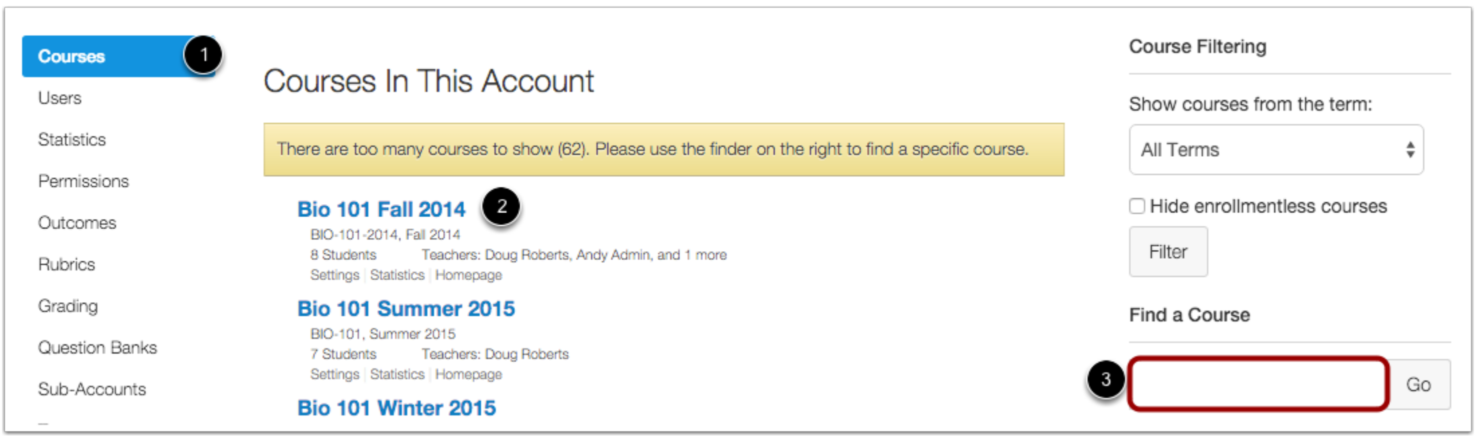


Click the **Delete Course** button to confirm deletion.

How do I unconclude a course in an account?

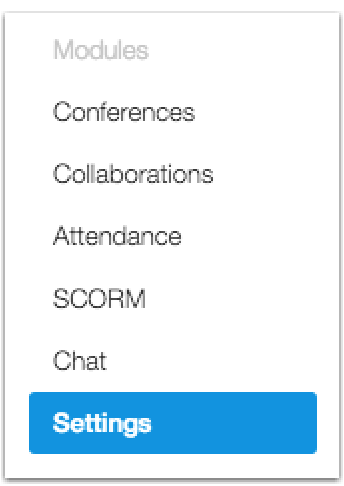
If an instructor has the appropriate permissions to conclude a course before the end of the term, Canvas sets an immediate end date for the course and puts the course in an archived state for both students and instructors. However, as an admin, you can unconclude courses at any time if an instructor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

Open Course



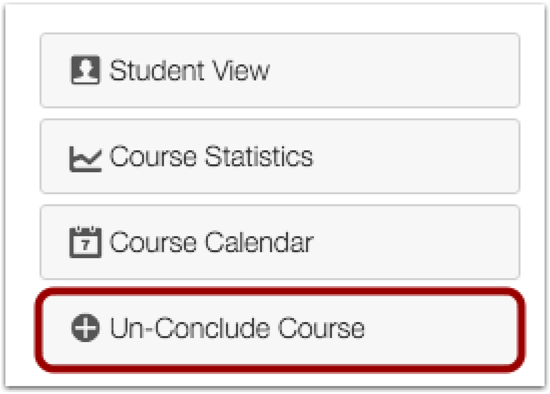
In Account Navigation, click the **Courses** tab. In the courses list [2], click the name of the course you want to unconclude. You can also search for the course in the **Find a Course** field [3].

Open Settings



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

Unconclude Course



Click the **Unconclude Course** button.

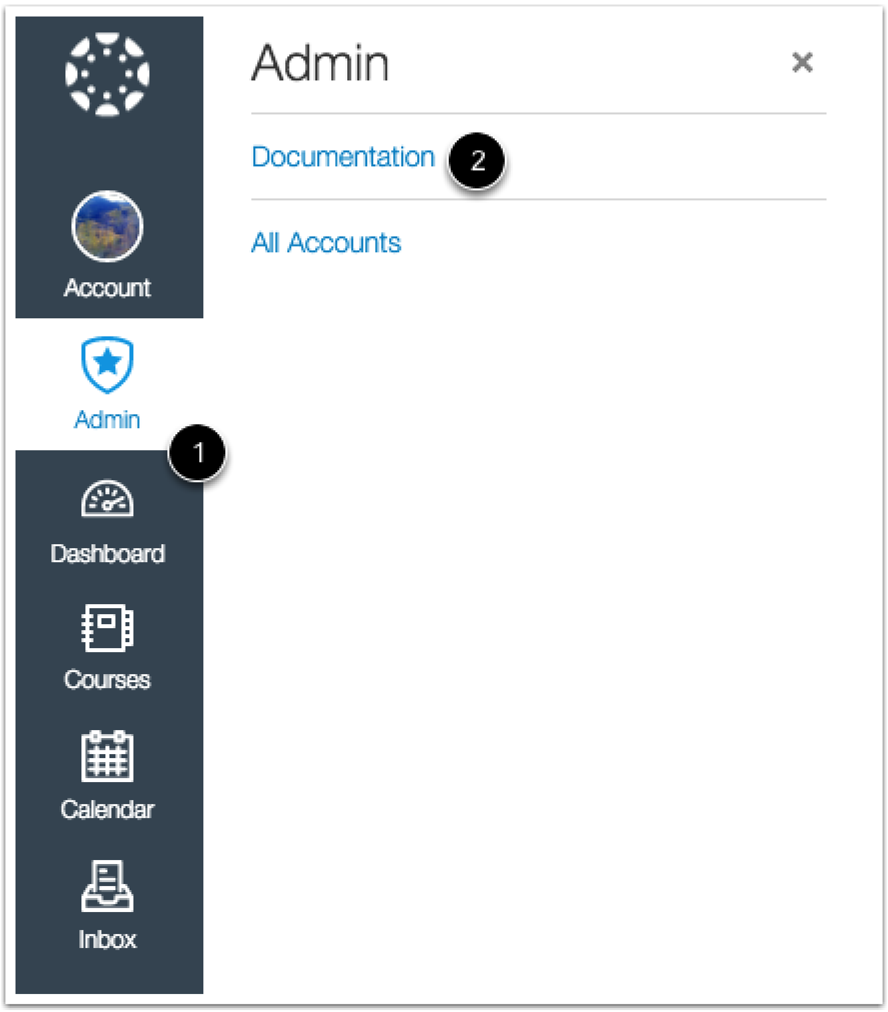
Verify Course

Verify that the course has been unconcluded.

How do I filter courses in an account?

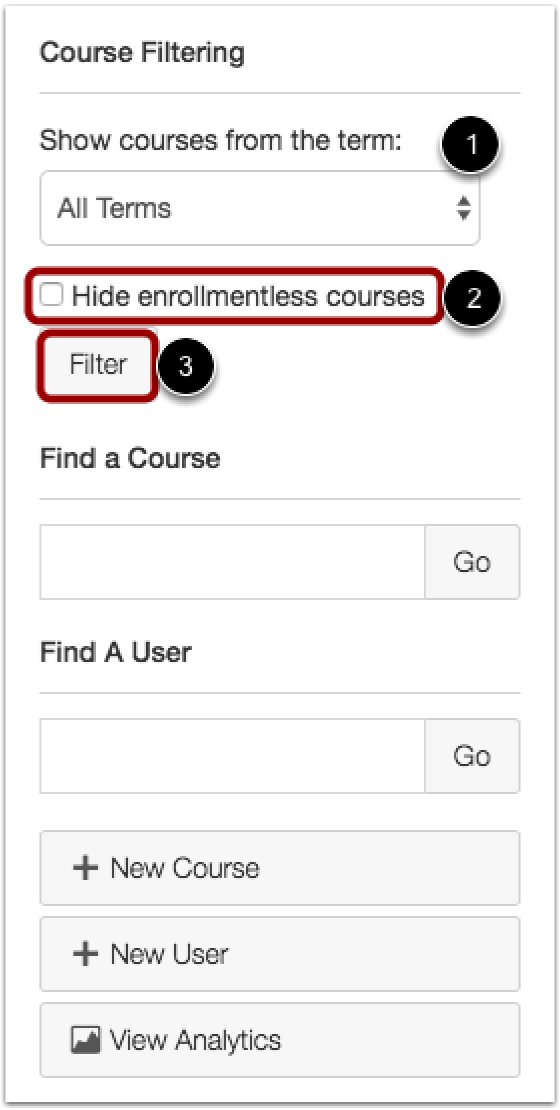
You can filter courses within your Managed Accounts in Canvas.

Open Account



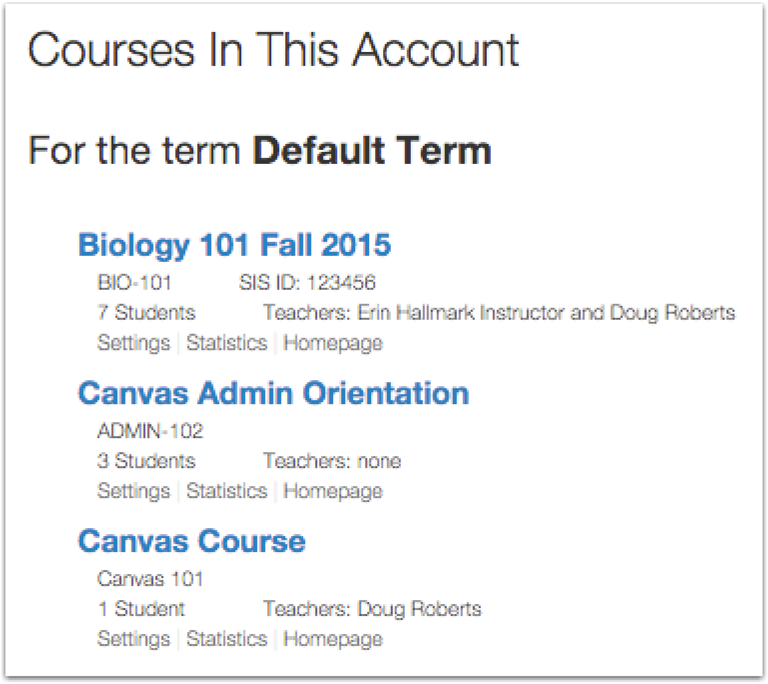
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Filter Course



Click the **Show courses from the term** dropdown menu to select which term you wish to filter by [1]. You can hide enrollment-less courses by selecting the **Hide enrollment-less courses** checkbox [2]. Click the **Filter** button [3] to filter courses.

View Courses

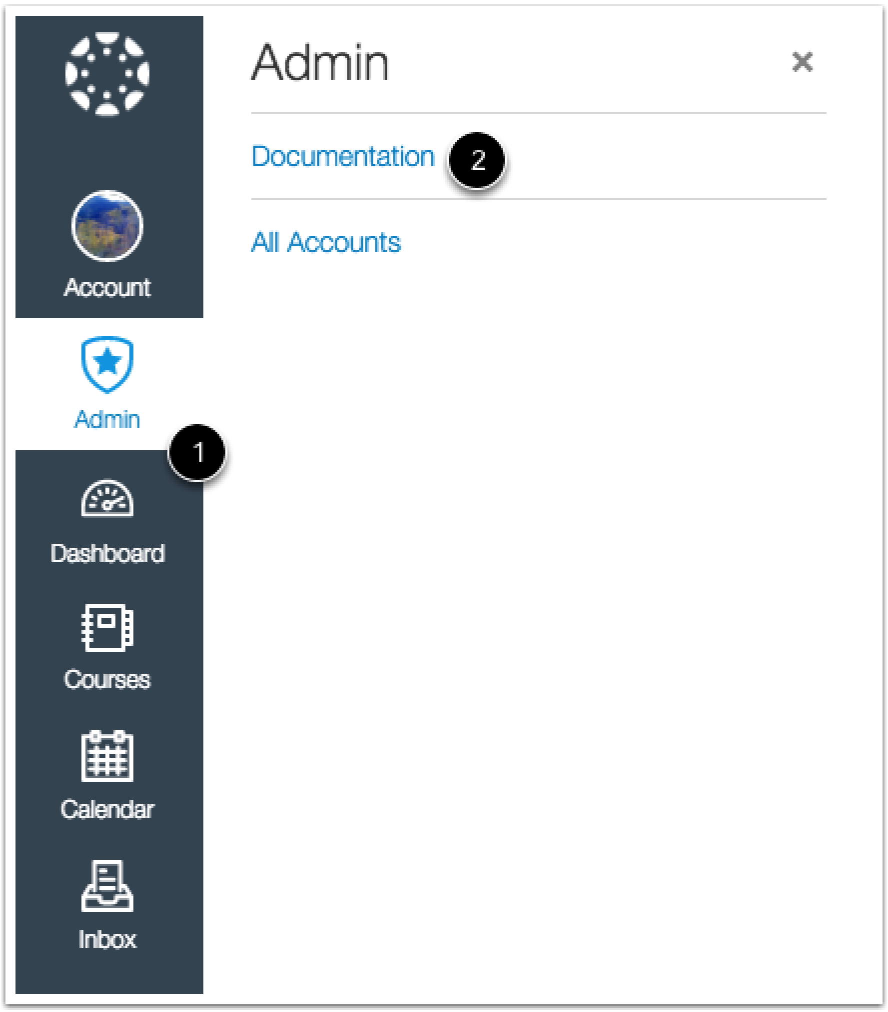


View your courses through the term filter.

How do I find courses in an account?

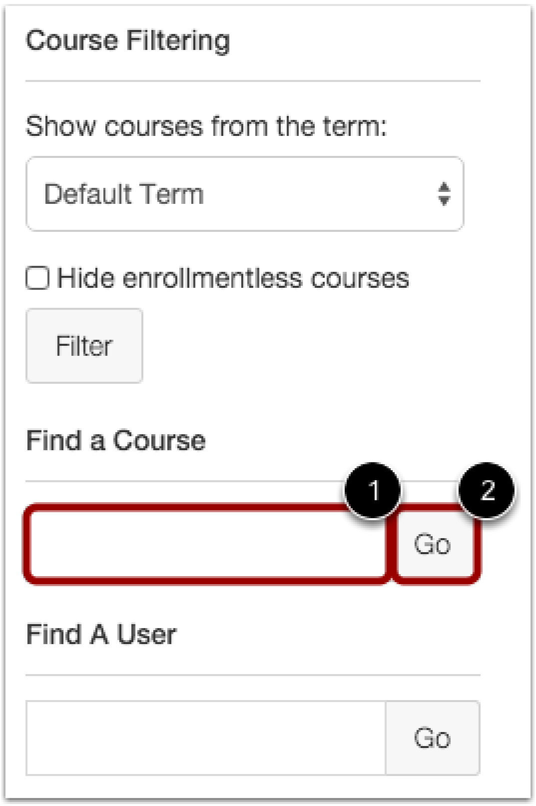
You can manually find courses by going through the list of courses in the account, or you can use the Find a Course search box.

Open Account



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

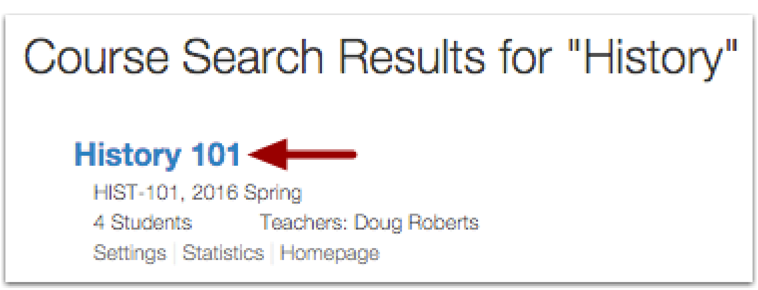
Search for Course



Type the name of the course in the course name field [1]. Click the **Go** button [2].

Note: You cannot search for a course by the course ID number, only the course name.

Open Course



View the search results. Click the title of the course to open it.

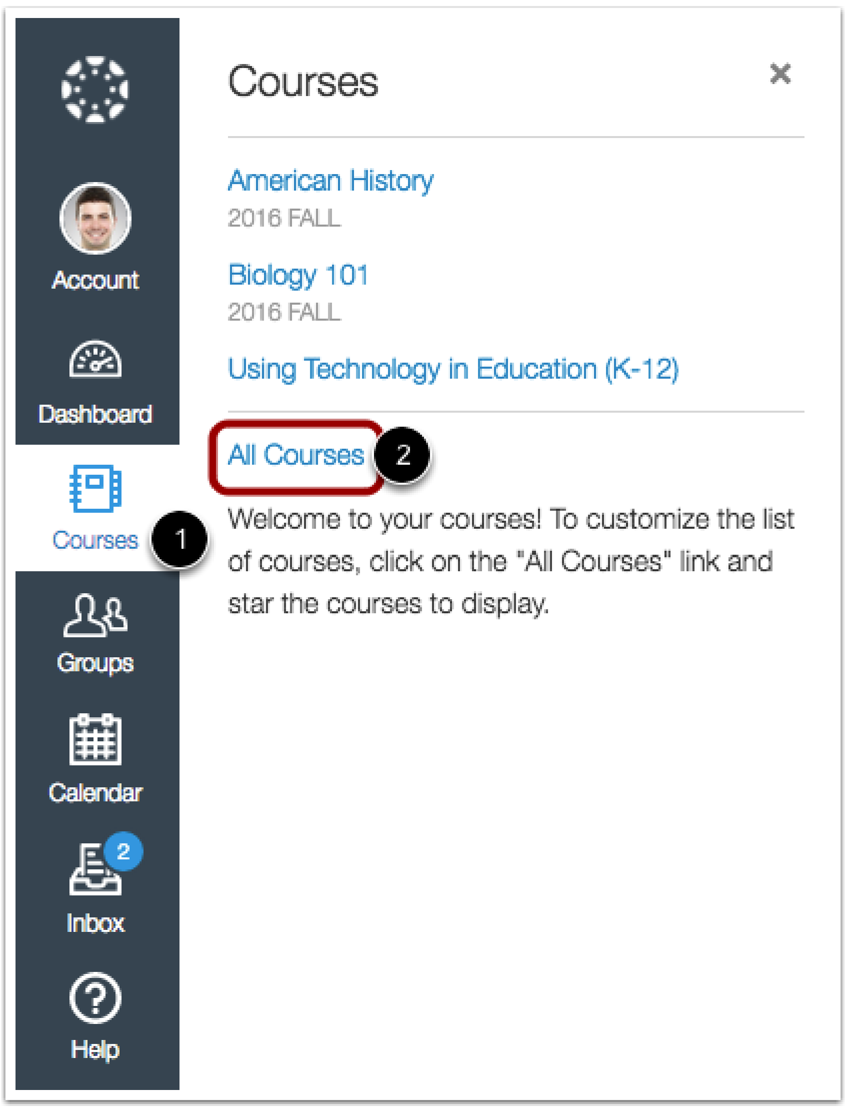
How do I view my institution's Public Course Index?

The Public Course Index allows all users within an institution to publicly view the institution's course index in a catalog format. 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. If you cannot see the courses link, your institution has not enabled this feature.

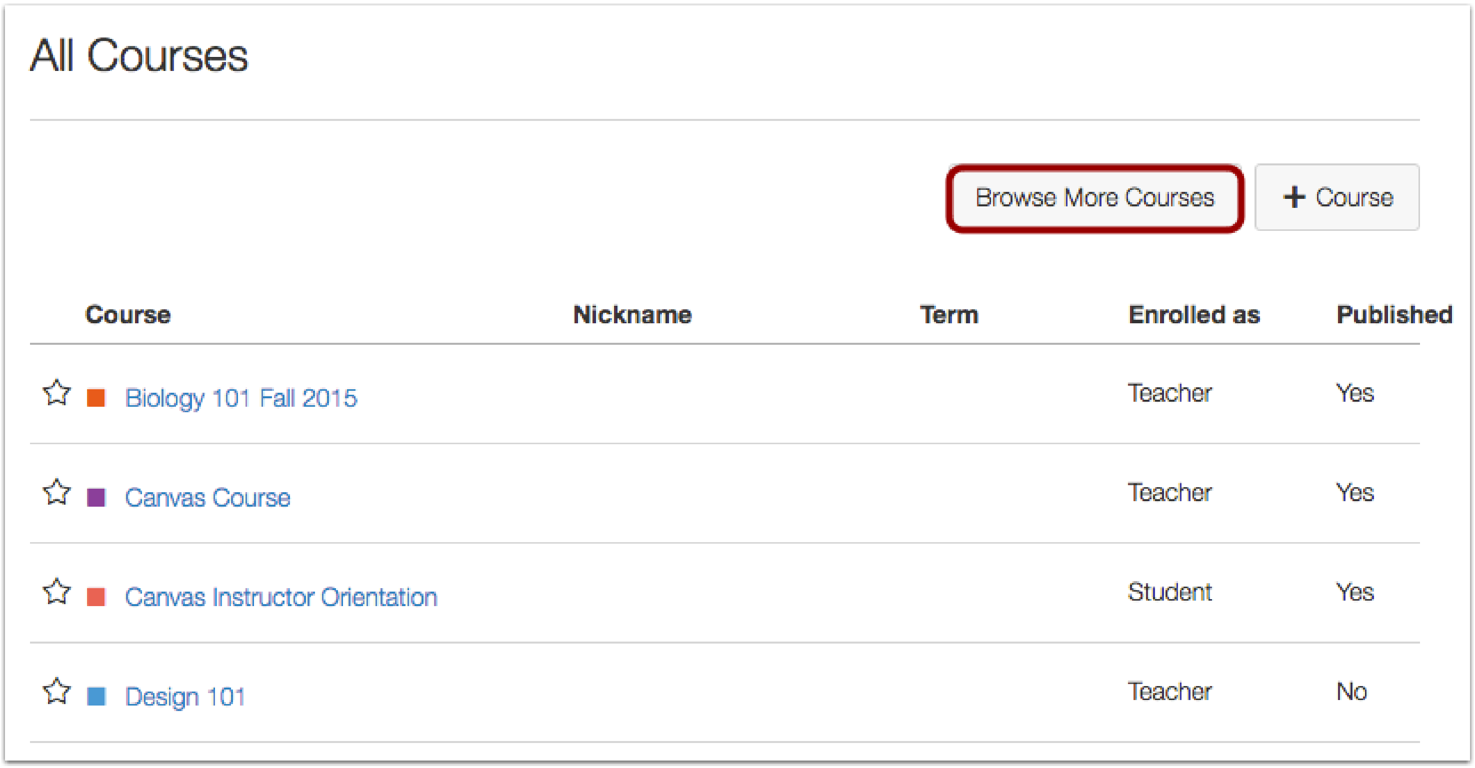
- If you are an admin, learn how to manage feature options in the account features lesson.
- If you are an instructor, learn how to include your course in the public course index.

Open Courses



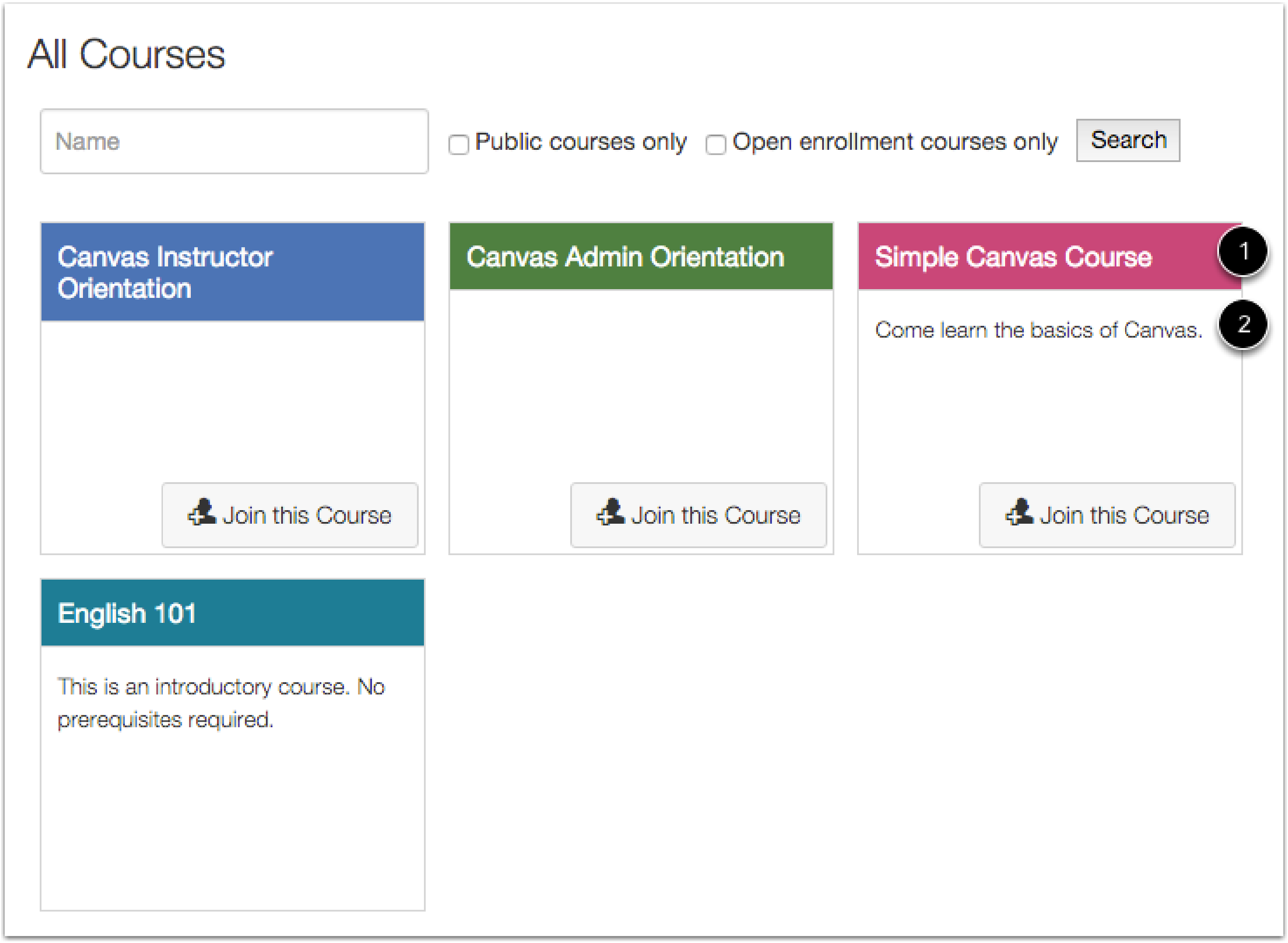
In Global Navigation, click the **Courses** link [1], then click the **All Courses** link [2].

Browse More Courses



In the My Courses page sidebar, click the **Browse More Courses** link.

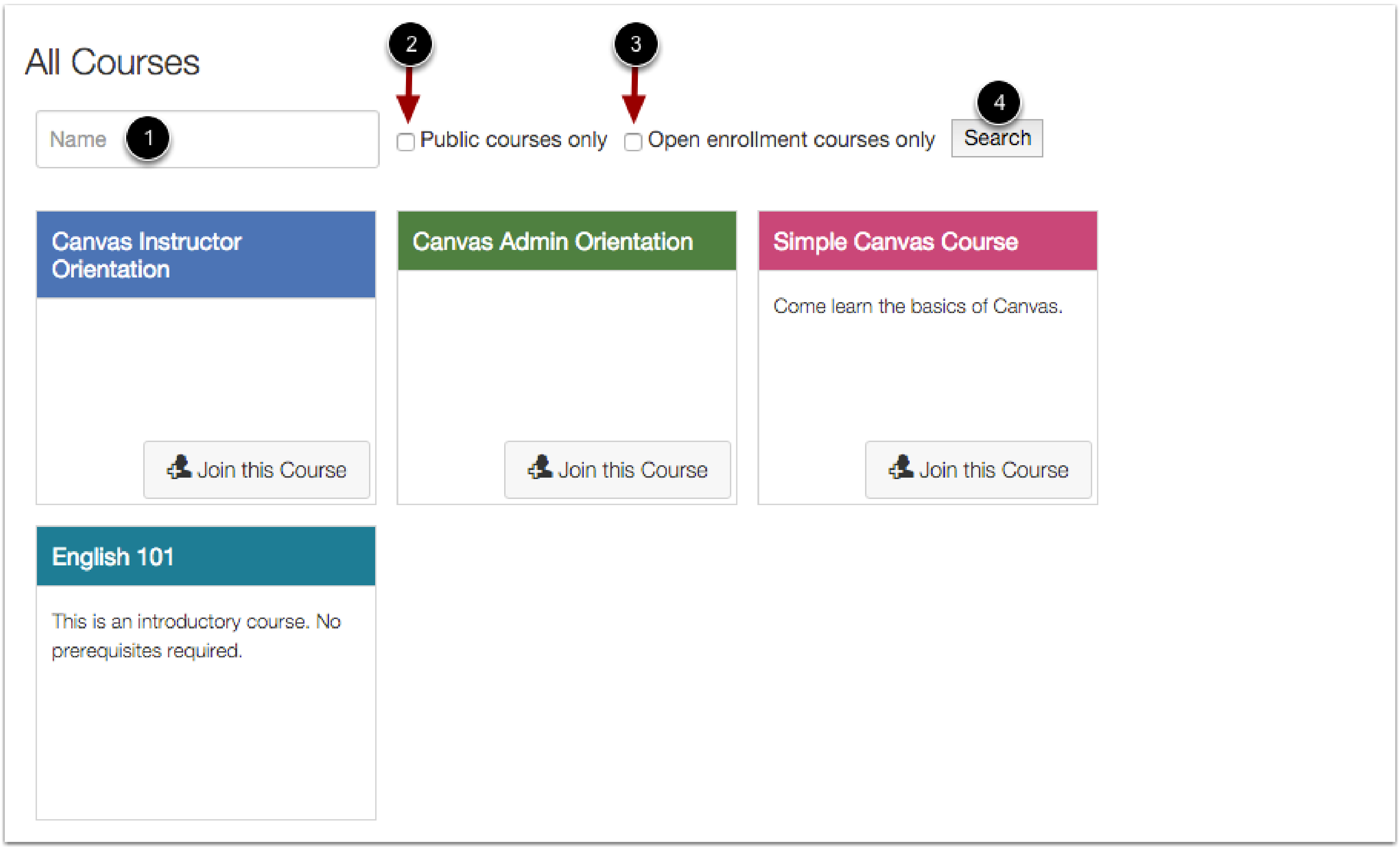
View All Courses



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

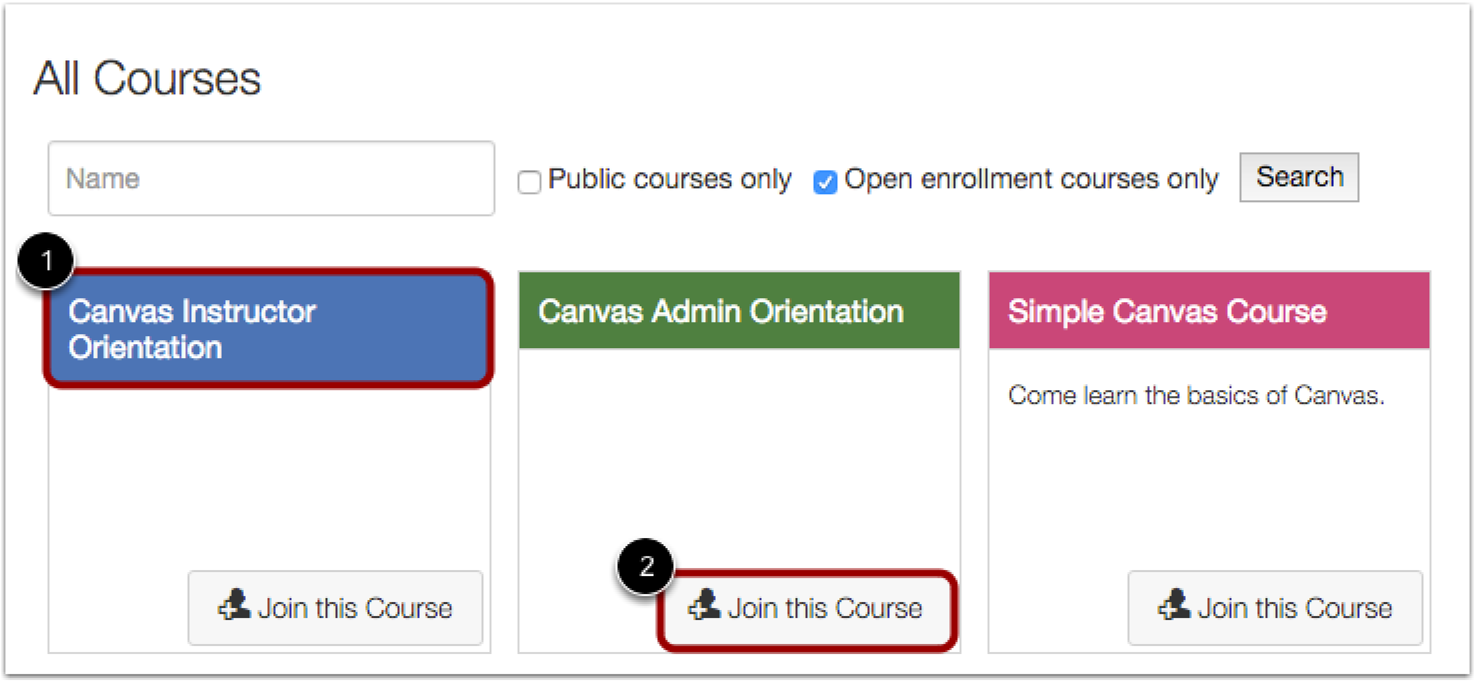


You can search for courses in several different ways. In the Name field [1], you can type the name of a course.

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 is set to open enrollment, you can join the course by clicking the **Join this Course** button [2].

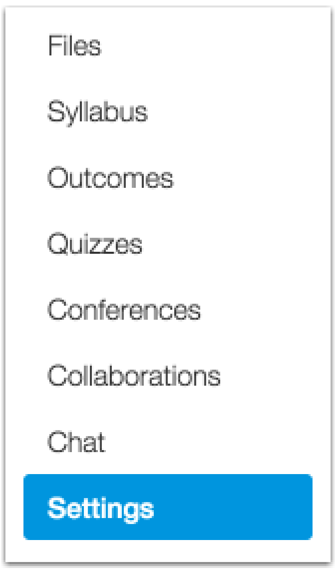
How do I add a section to a course?

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 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 Settings



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

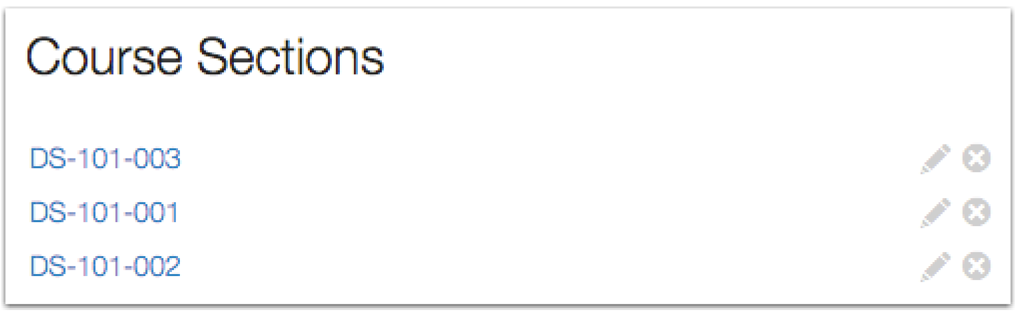
Open Sections

Click the **Sections** tab.

Add Section

Type the name of the new section in the name field [1]. Click the **Add Section** button [2].

View Sections



View the section in your course.

You can add section dates and other details by editing the section details.

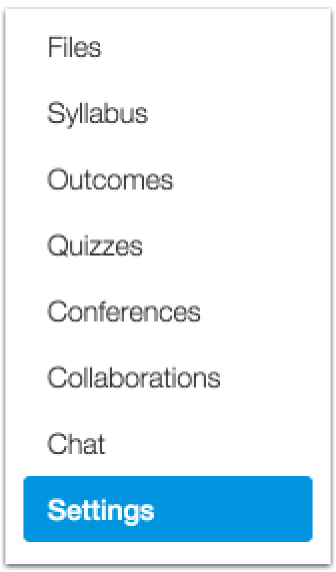
Note: The sections are displayed in the order in which they are created. You can not move sections to organize them, but you can edit the sections.

How do I edit the details for a course section?

You can easily edit details for each section in your course. As part of editing details, you may need to create start and end dates for your section. Dates can be shorter than the course dates or overlap the section dates. Changing the section dates creates an override for the section dates, and students can only access the section during the specified section dates.

Note: You can only edit a section after you have opened the course where the section currently resides. Sections may be added by your institution's student information system (SIS). If a section in your course includes an SIS ID, you may not have permission to edit sections.

Open Course Settings

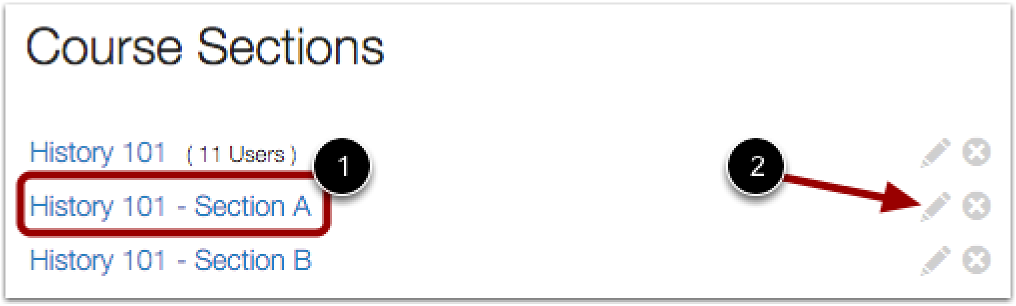


In Course Navigation, click the **Settings** link.

Open Sections

Click the **Sections** tab.

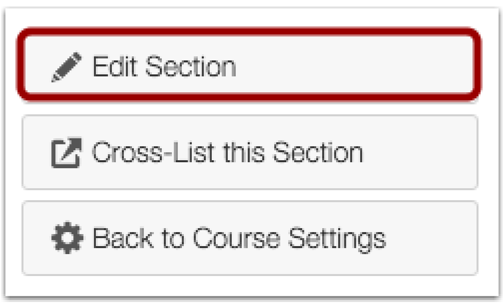
Open Section



To edit details for a section, click the name of the section [1].

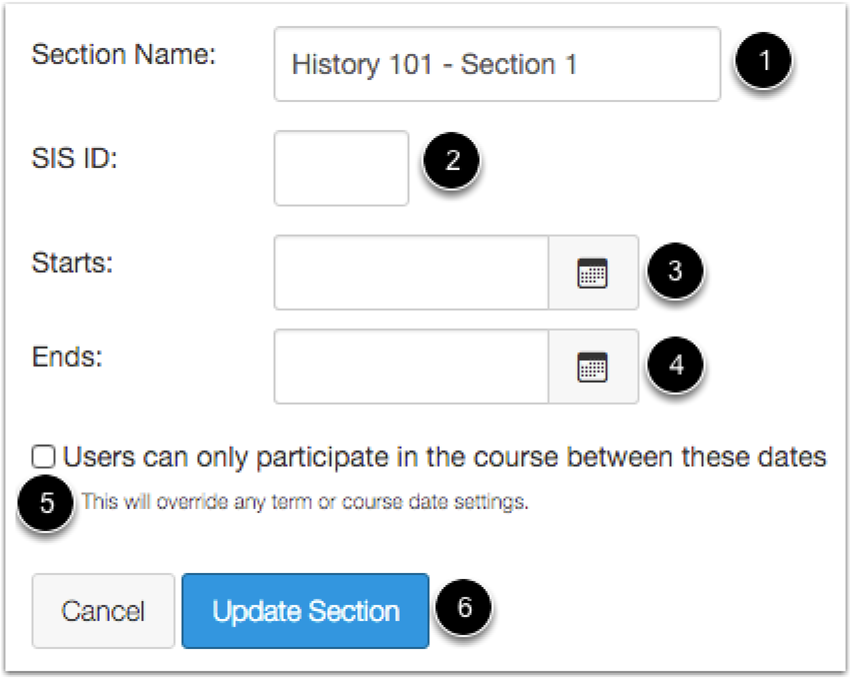
Note: If you only want to change the name of the section, you can click the **Edit** icon [2].

Edit Section



In the sidebar, click the **Edit Section** button.

Update Section



In the **Section Name** field [1], create a name for the section.

If you have permission to view the SIS ID field [2], add an SIS ID or edit an existing ID.

Create a start date for the section by clicking the **Starts** calendar icon [3]. Create an end date for the section by clicking the **Ends** calendar icon [4].

If you want the section participation dates to override the course dates, select the **Users can only participate in the course between these dates** checkbox [5]. Any user added to the section won't be able to participate in the course until the section start date.

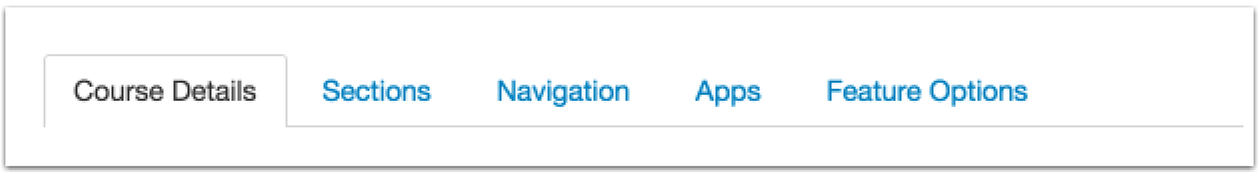
Click the **Update Section** button [6].

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 course on a different account or sub-account.

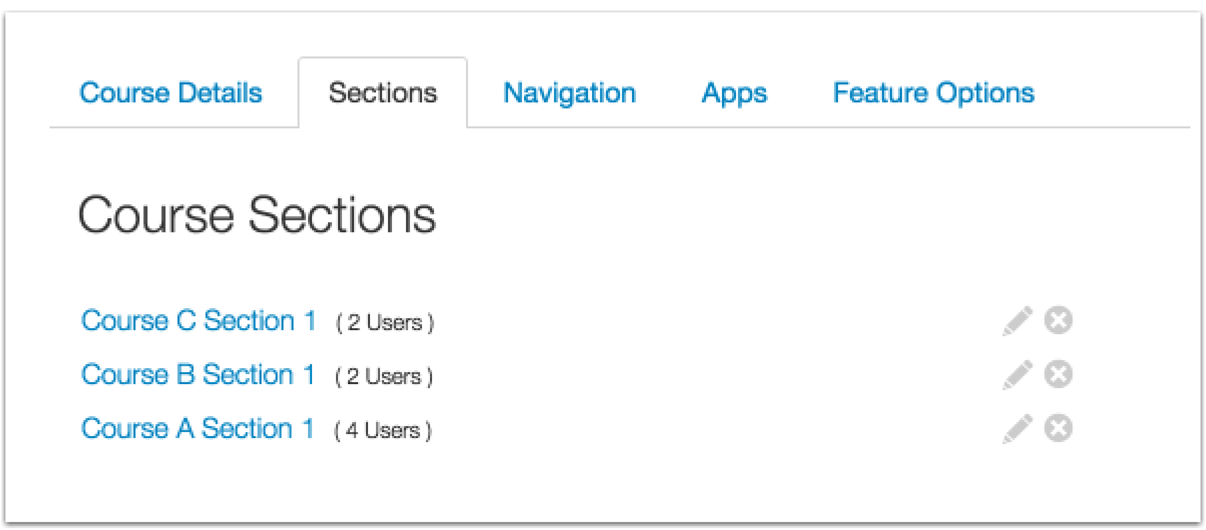
Cross-listing is usually an admin permission only. However, some institutions allow their instructors to cross-list their own sections.

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



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

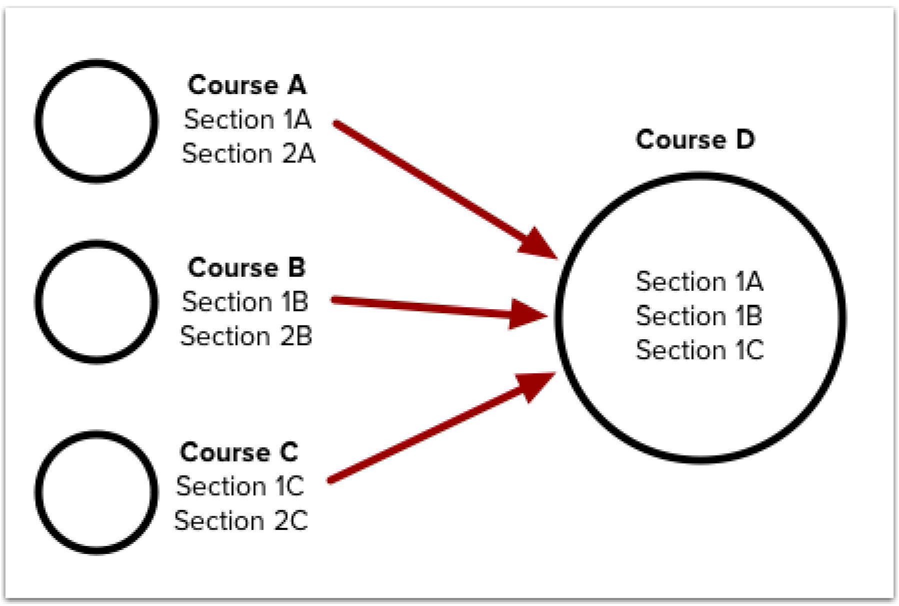
Coursework is retained with the course, not with the section enrollments. Therefore, **cross-listing should only be done in unpublished courses**. If there are student submissions in the course when the section is cross-listed into another course, the submissions and grades will be hidden in the source course. If you need to restore the enrollments, you can de-cross-list a section back to the course, and student data, submissions, and grades will also be restored.

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?

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. This lesson shows how to manually cross-list a section, though cross-listing can also be done through SIS imports.

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. 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).

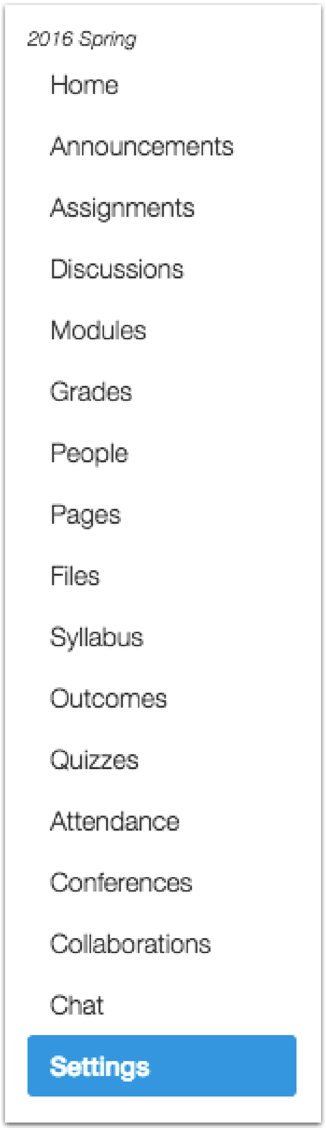
Sections can only be in one course at a time. Once a section is cross-listed, you can re-cross-list the section into another course if necessary.

To learn how to cross-list a section, view the cross-listing video.

Notes:

- Cross-listing a section is a course permission. If you are an instructor and cannot view the cross-list options, this feature has been restricted by your institution.
- If you are an instructor and are allowed to cross-list, you may choose to de-cross-list a section. This option means that you can send the section back to the original course. If there is a chance you want to de-cross-list a section, make sure you add yourself to another section in the original course before cross-listing, otherwise you will no longer have access in the original course. If you have already cross-listed a course that you cannot de-cross-list, contact your Canvas admin.

Open Course Settings

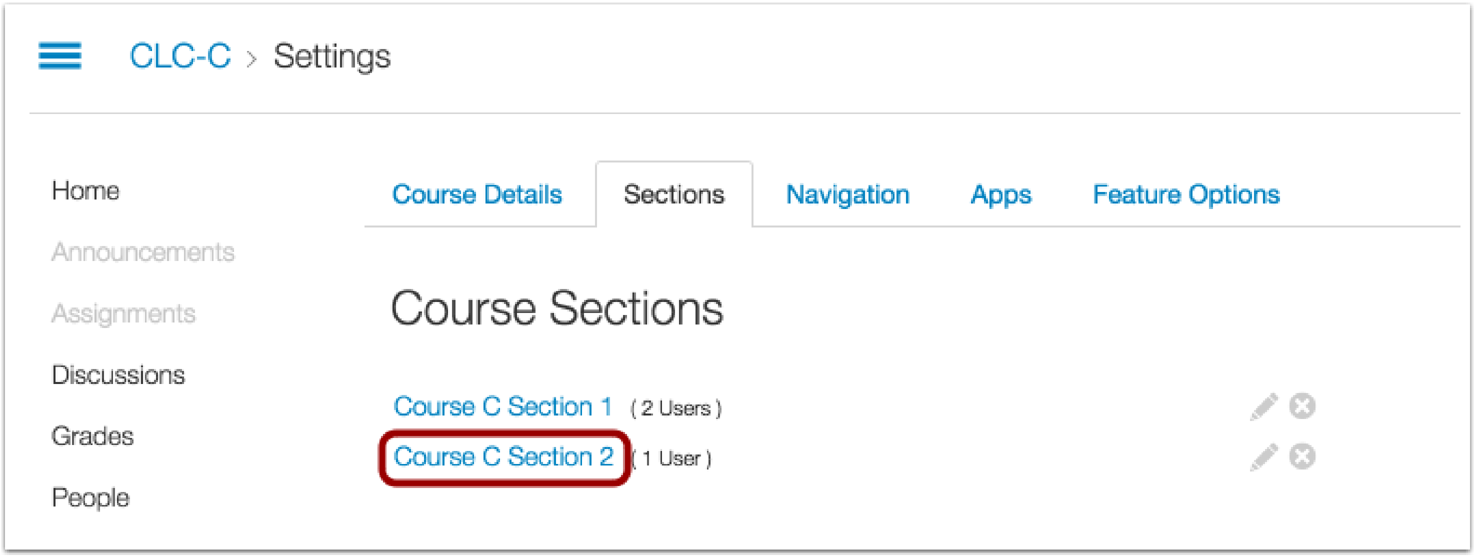


In Course Navigation, click the **Settings** link.

Open Sections Tab

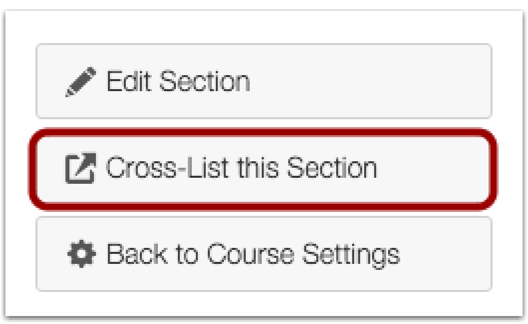
Click the **Sections** tab.

Open Section



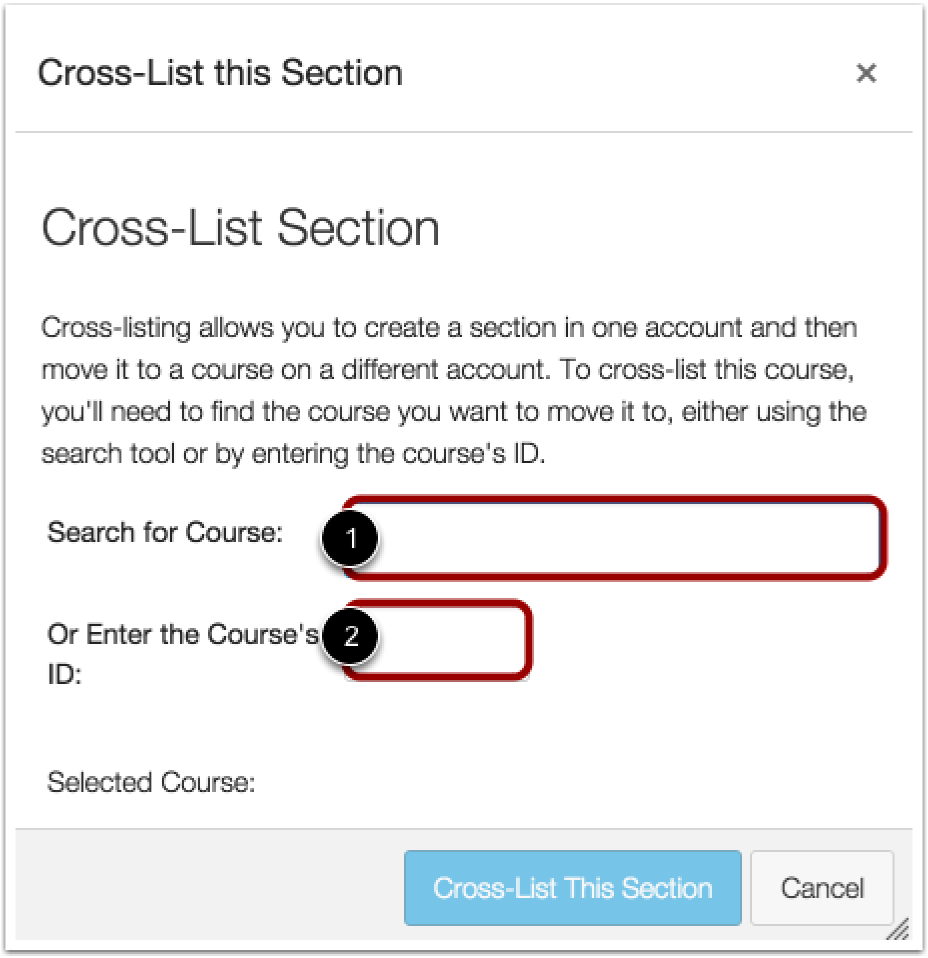
Click the title of the section you want to cross-list.

Cross-List Section



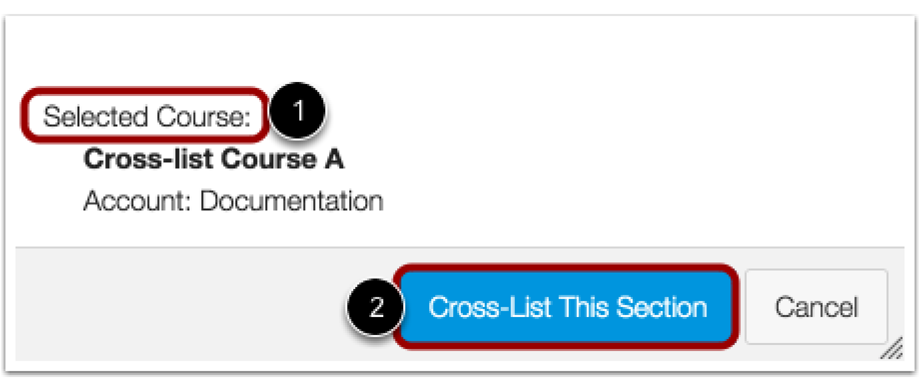
Click the **Cross-List this Section** button.

Search for Course



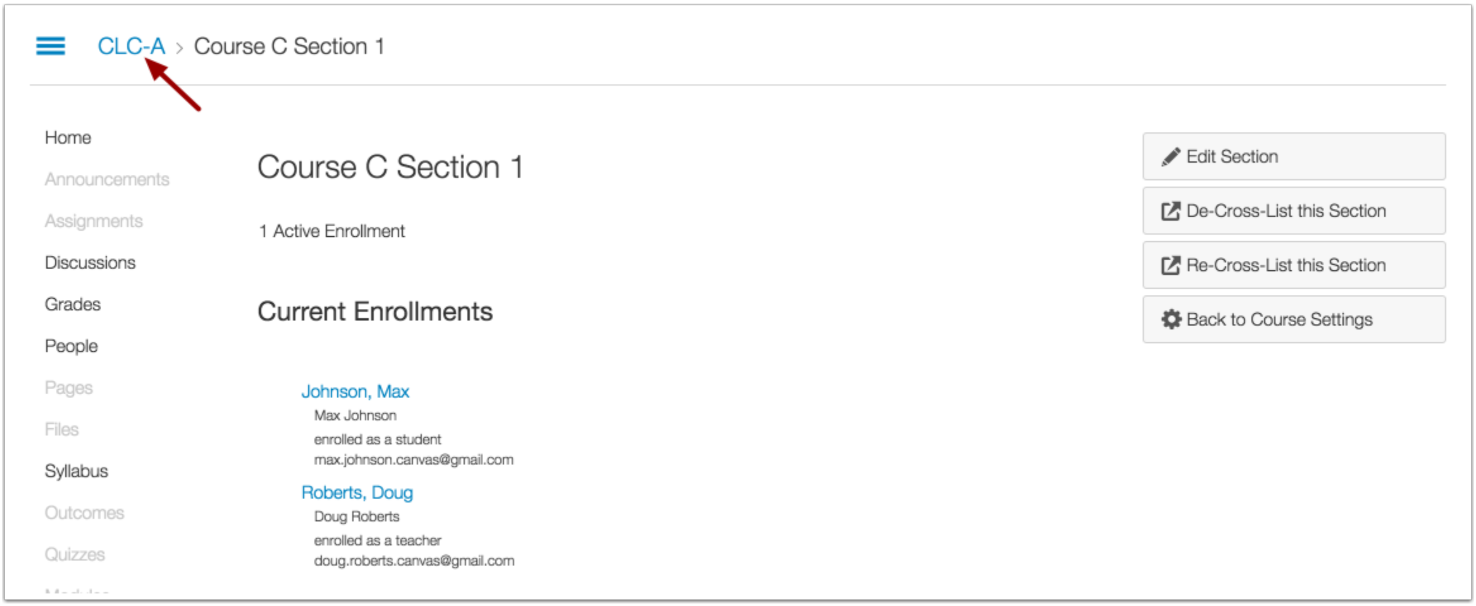
In the Search for Course field [1], enter the name of the course. Or, in the Course ID field [2], enter the ID number for the course.

Cross-List this Section



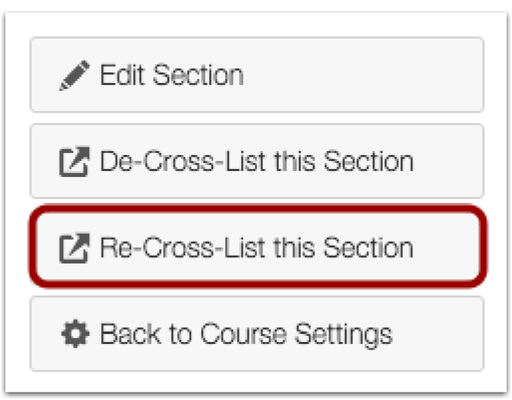
Confirm you have selected the correct course [1]. Click the **Cross-List This Section** button [2].

Confirm Cross-Listing



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

Re-Cross-List Section



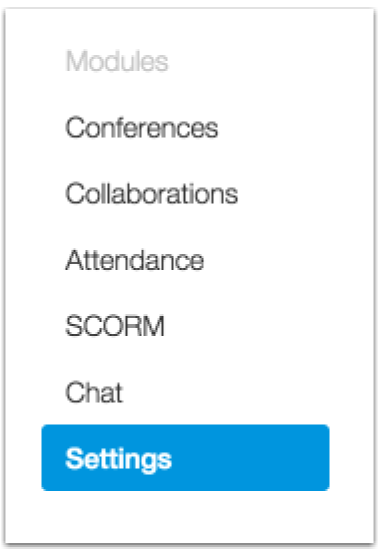
Sections can only be in one course at a time. If you need to cross-list the section into a different course, click the **Re-Cross-List this Section** button.

How do I de-cross-list a section in a course?

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. However, 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.

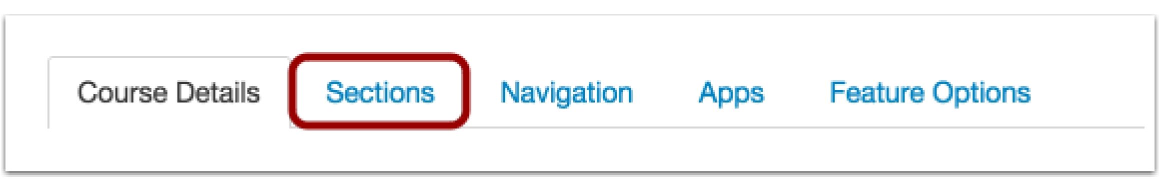
Note: If you are an instructor and you cannot view the **De-Cross-List this Section** button, you no longer have an enrollment in the original course. For assistance in de-cross-listing a section, please contact your Canvas admin.

Open Course Settings



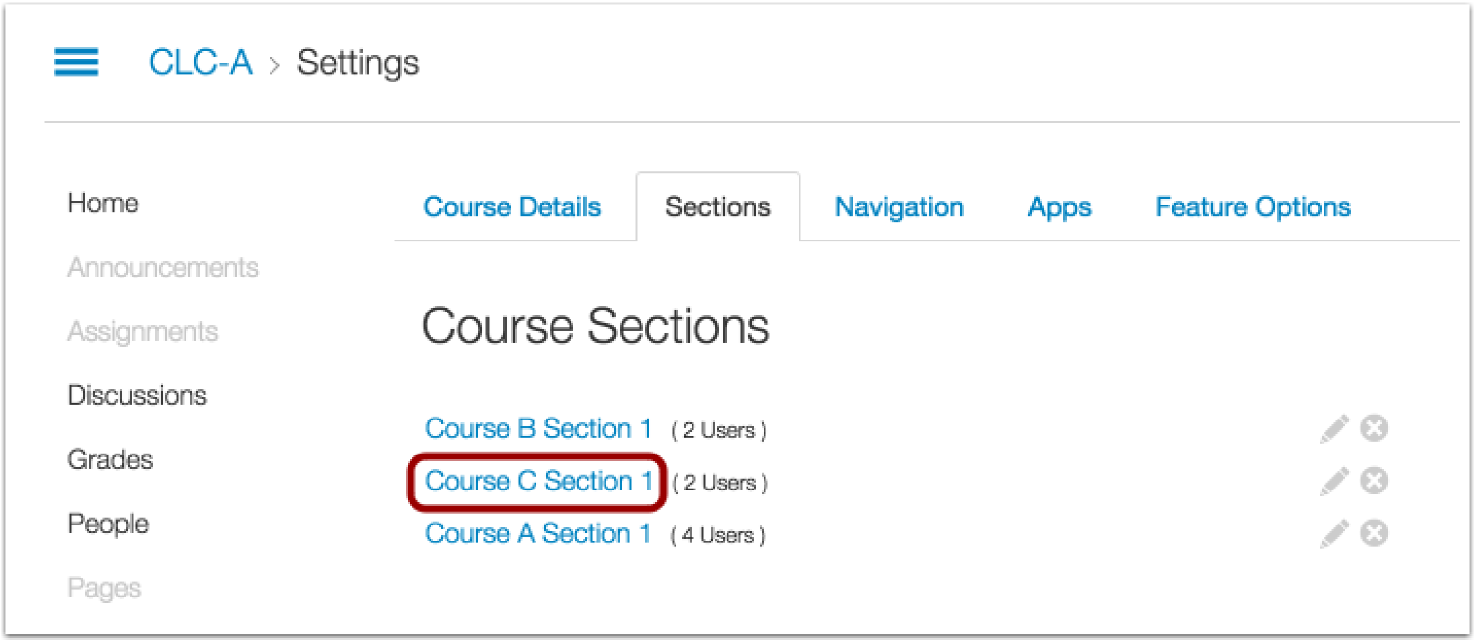
In Course Navigation, click the **Settings** link.

Open Sections Tab



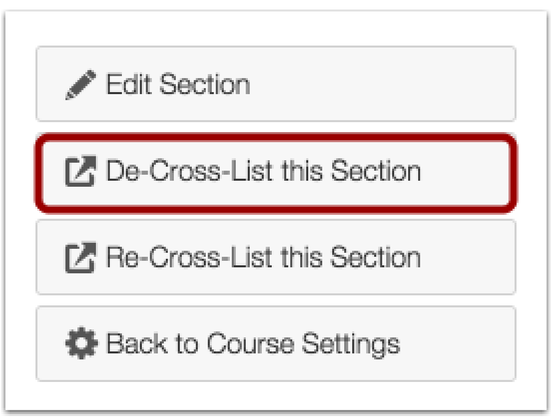
Click the **Sections** tab.

Open Section



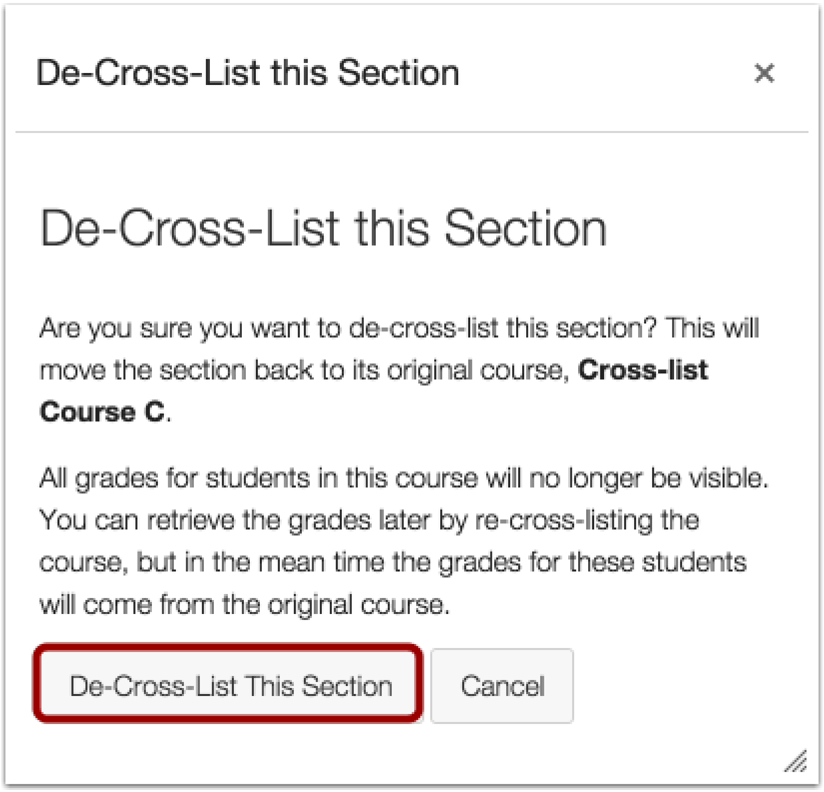
Click the title of the section you want to de-cross-list.

De-Cross-List This Section



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

Confirm De-Cross-Listing



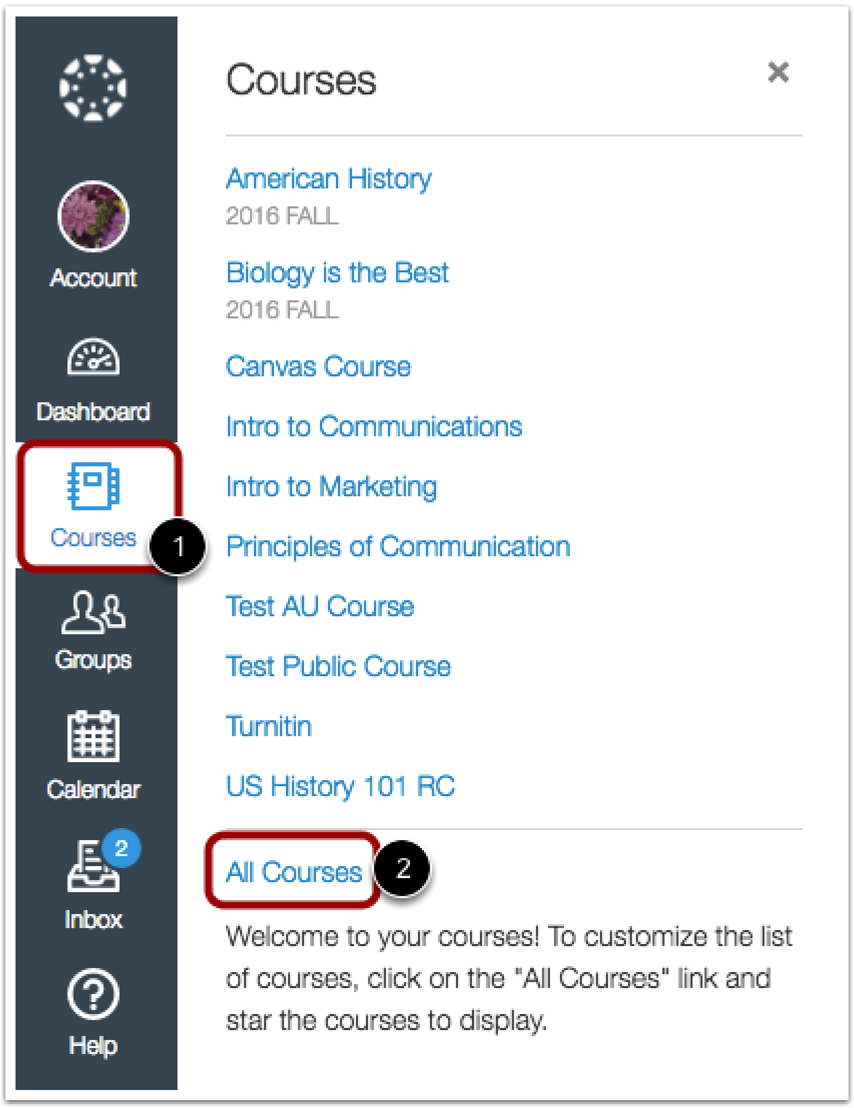
Click the **De-Cross-List This Section** button. The section will be moved back to its original course.

How do I view my Canvas courses?

After logging into Canvas, you can view your current, past, and future enrollment courses in Canvas.

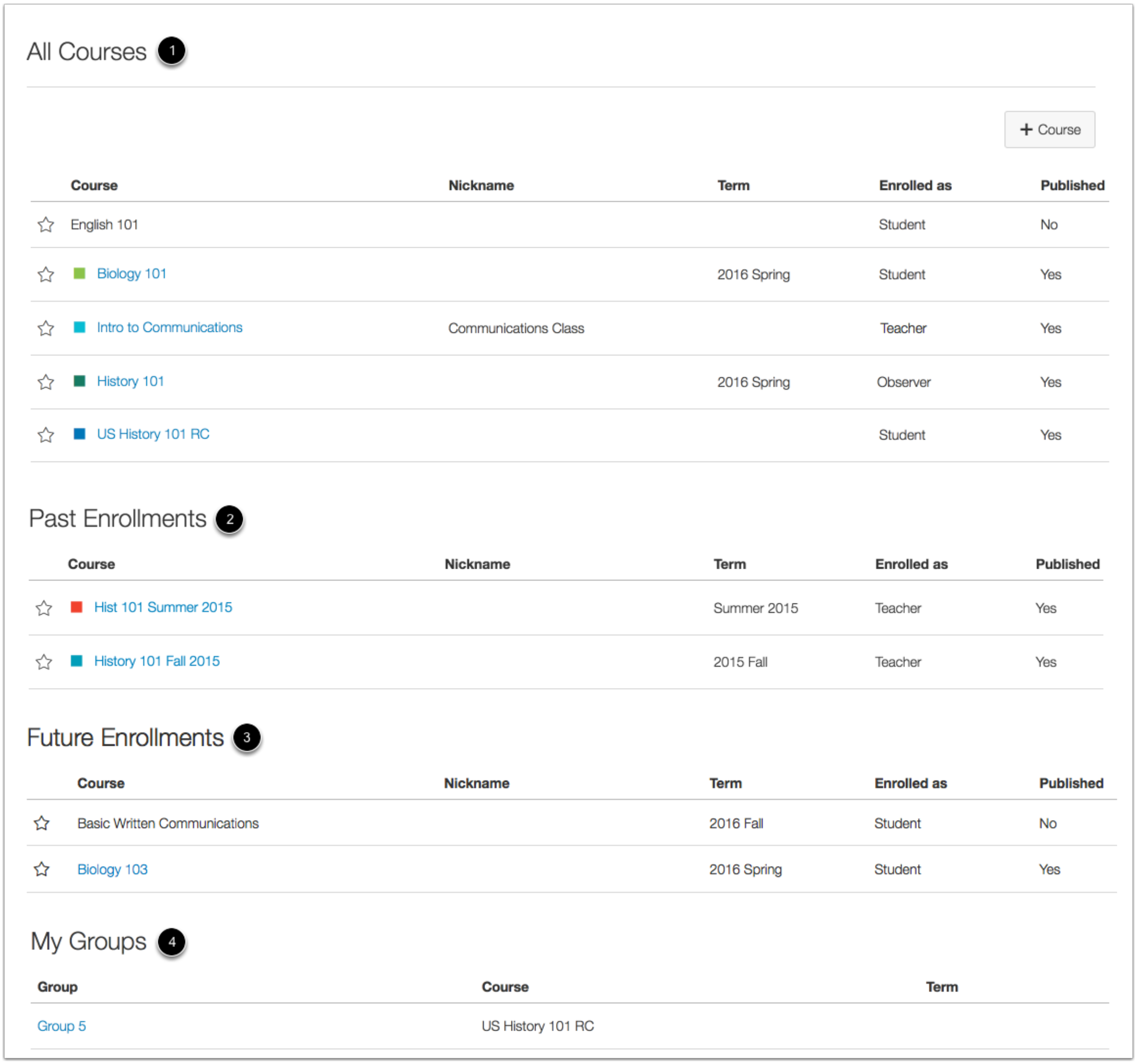
Note: Some institutions may restrict the option to view or access future enrollment courses before the start date and/or access concluded courses after the course has ended.

Open Courses



In Global Navigation, click the **Courses** link [1], then click the **All Courses** link [2].

View Courses



All Courses 1

+ Course

	Course	Nickname	Term	Enrolled as	Published
☆	English 101			Student	No
☆	Biology 101		2016 Spring	Student	Yes
☆	Intro to Communications	Communications Class		Teacher	Yes
☆	History 101		2016 Spring	Observer	Yes
☆	US History 101 RC			Student	Yes

Past Enrollments 2

	Course	Nickname	Term	Enrolled as	Published
☆	Hist 101 Summer 2015		Summer 2015	Teacher	Yes
☆	History 101 Fall 2015		2015 Fall	Teacher	Yes

Future Enrollments 3

	Course	Nickname	Term	Enrolled as	Published
☆	Basic Written Communications		2016 Fall	Student	No
☆	Biology 103		2016 Spring	Student	Yes

My Groups 4

Group	Course	Term
Group 5	US History 101 RC	

Courses are organized into All Courses [1], Past Enrollments [2], Future Enrollments [3], and Groups [4].

View All Courses

All Courses

+ Course

	Course	Nickname	Term	Enrolled as	Published
☆	English 101			Student	No
☆	Biology 101		2016 Spring	Student	Yes
☆	Intro to Communications	Communications Class		Teacher	Yes
☆	History 101		2016 Spring	Observer	Yes
☆	US History 101 RC			Student	Yes

All Courses are courses that are part of the current semester or term. However, depending on access settings for a course, My Courses can also display courses that have not yet started or are unpublished.

Courses that are available to you are listed in blue text [1]. These courses have been published and include a link to the course. To open a course, click the name of the course. Courses that are within the current term dates but are not yet available are listed in black text [2]. These courses have not been published.

You can also view any nicknames you have created for courses [3].

If a course includes a term date [4], the term date displays next to the course name.

Each course includes your enrollment status [5]. Statuses can be student, teacher, TA, observer, designer, or a custom role as created by your institution.

View Past Enrollments

Past Enrollments

	Course	Nickname	Term	Enrolled as	Published
☆	Hist 101 Summer 2015		Summer 2015	Teacher	Yes
☆	History 101 Fall 2015		2015 Fall	Teacher	Yes

Courses under the **Past Enrollments** heading are courses that have concluded but are still available as a read-only archived course. Prior users can view course material and grades but cannot submit any assignments.

Note: Some institutions may not allow past enrollments to display in the Courses page.

View Future Enrollments

Future Enrollments

	Course	Nickname	Term	Enrolled as	Published
☆	Basic Written Communications 1		2016 Fall	Student	No
☆	Biology 103 2		2016 Spring	Student	Yes

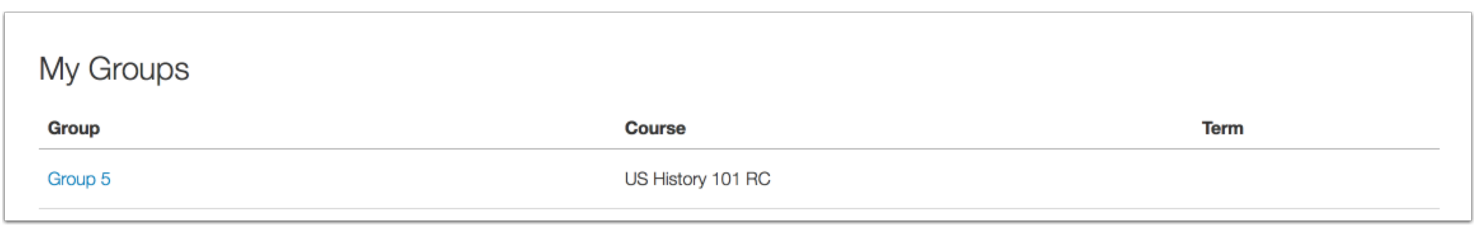
Future Enrollments are courses that will be made available as part of an upcoming term or specific course start date.

Future courses may be published or unpublished. However, some institutions may restrict students from viewing published courses before the start date. If you are student and a future published course does not include a link [1], the course cannot be viewed until the start date.

If a future course does include a link [2], you can view course content but cannot fully participate in the course until the start date. Full participation includes submitting assignments and replying to discussions.

Note: Some institutions may not allow future enrollments to display in the Courses page.

View Groups



My Groups

Group	Course	Term
Group 5	US History 101 RC	

If you are enrolled in groups, the Groups section displays any groups within your current courses. You can view all your groups in your groups list.

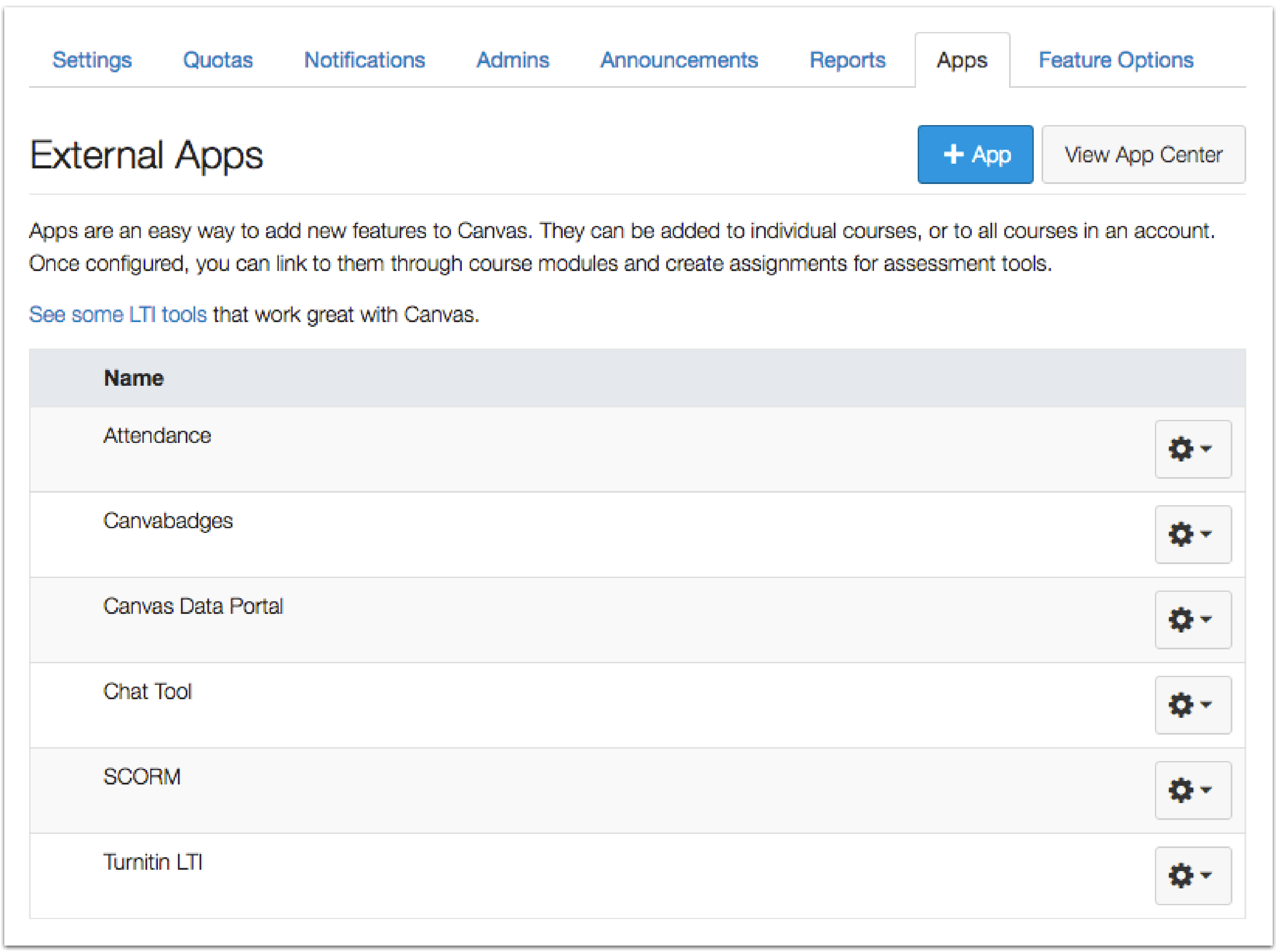
External Apps (LTI)

What are LTI Tools (External Apps)?

LTI provides a framework through which an LMS (Canvas) can send some verifiable information about a user to a third party. For LTI to work, the third party needs to provide a consumer key and shared secret that Canvas can use to generate a signature to verify the authenticity of the data sent. By default most user information is anonymized, but this can be changed when the configuration is first set up.

External Apps can be configured on the account or course level.

When would I use an External App?



External Apps add functionality to a Canvas course. For example, an instructor may want to include a study aid (flashcards, mini-quizzes, etc.) to help students better understand the concepts being taught.

Admins can add external apps for accounts and subaccounts via XML, URL, or manual configuration.

If apps do not already exist for a course, instructors can add external apps in their courses to create additional learning paths for students. External apps can be added to Modules, Course Navigation, the Rich Content Editor, and Assignments.

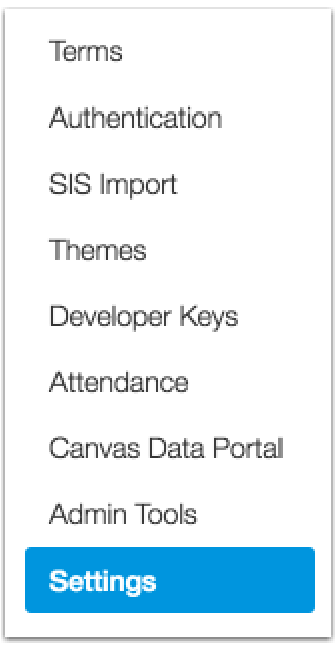
Admins and instructors can also enable apps through the App Center, which is integrated directly in Canvas.

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.

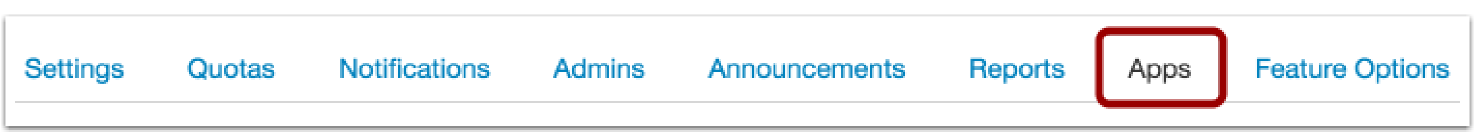
Note: This lesson applies to sub-accounts as well.

Open Settings



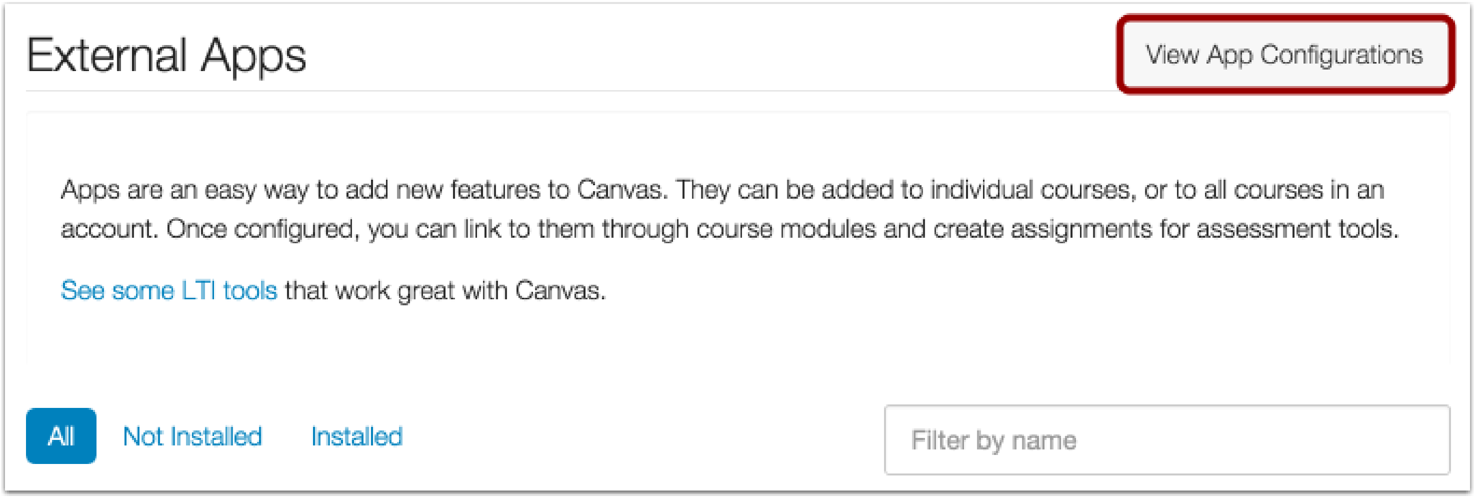
In Account Navigation, click the **Settings** link.

Open Apps



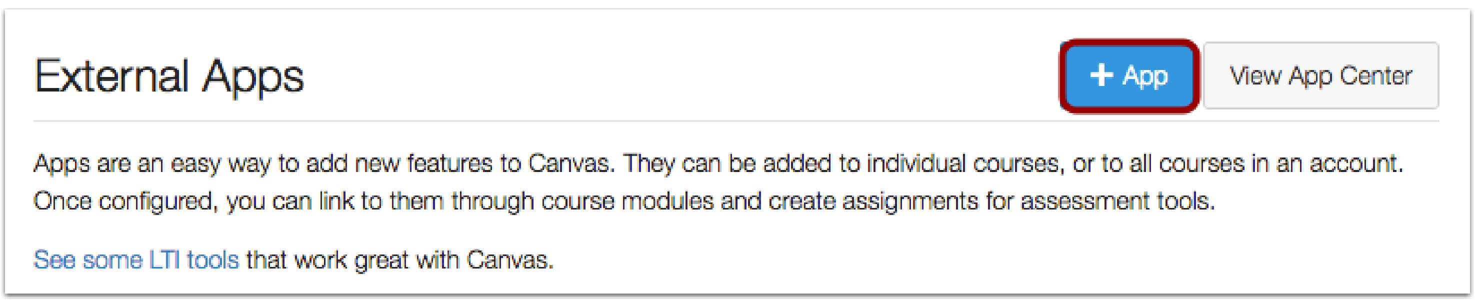
Click the **Apps** tab.

View App Configurations



To configure an app, click the **View App Configurations** button.

Add New App

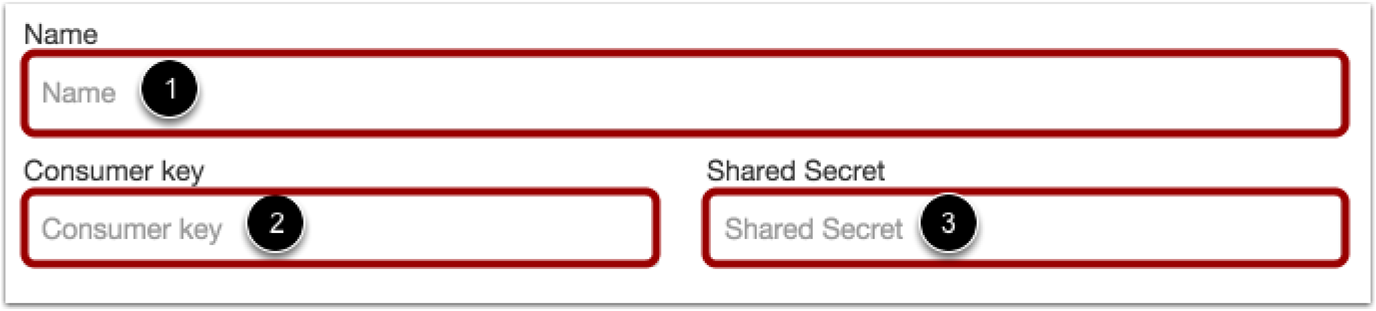


Click the **Add App** button.

Set Configuration Type

Select the Configuration Type drop-down menu and set the configuration type to **By URL**.

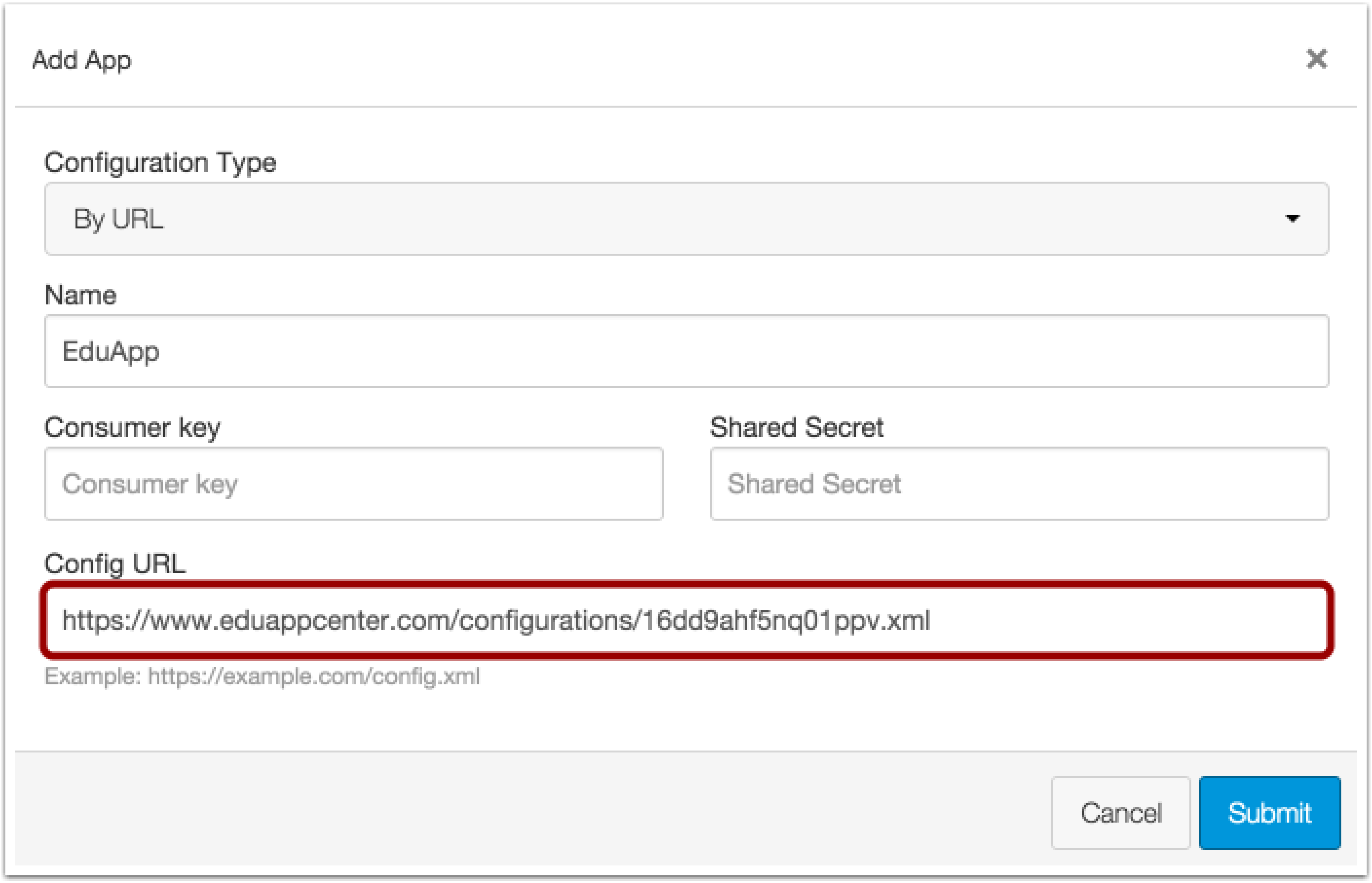
Add App Details



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

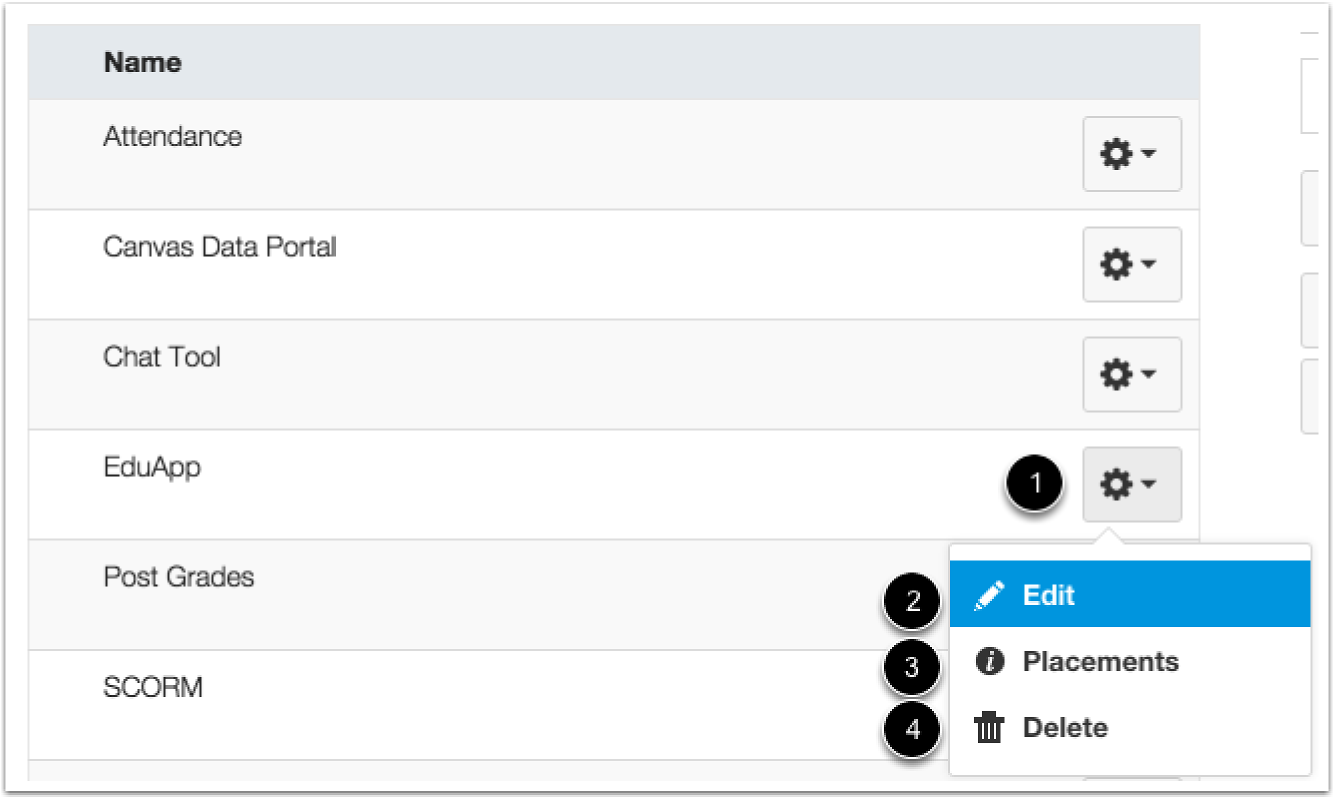


In the **Configuration URL** field, enter the URL for the app. Apps are configured and recommended to be entered as secure links (HTTPS).

Submit App

Click the **Submit** button.

View App



View the External App.

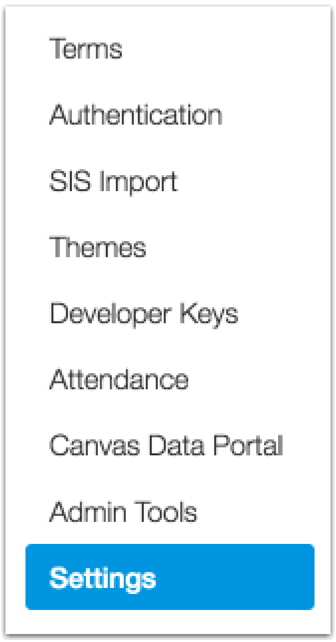
To manage the app, click the **Settings** icon [1]. To edit the app, click the **Edit** link [2]. To see the places where the app appears in Canvas, click the **Placements** link [3]. To delete the app, click the **Delete** link [4].

How do I configure 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.

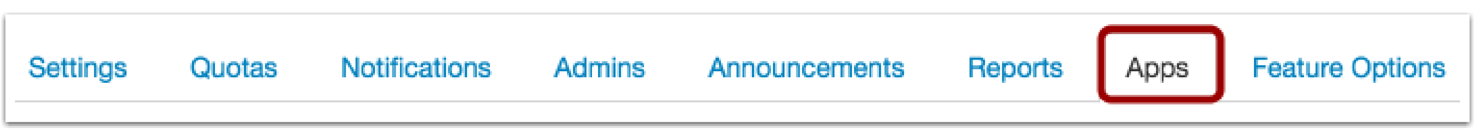
Note: This process applies to sub-accounts as well.

Open Settings



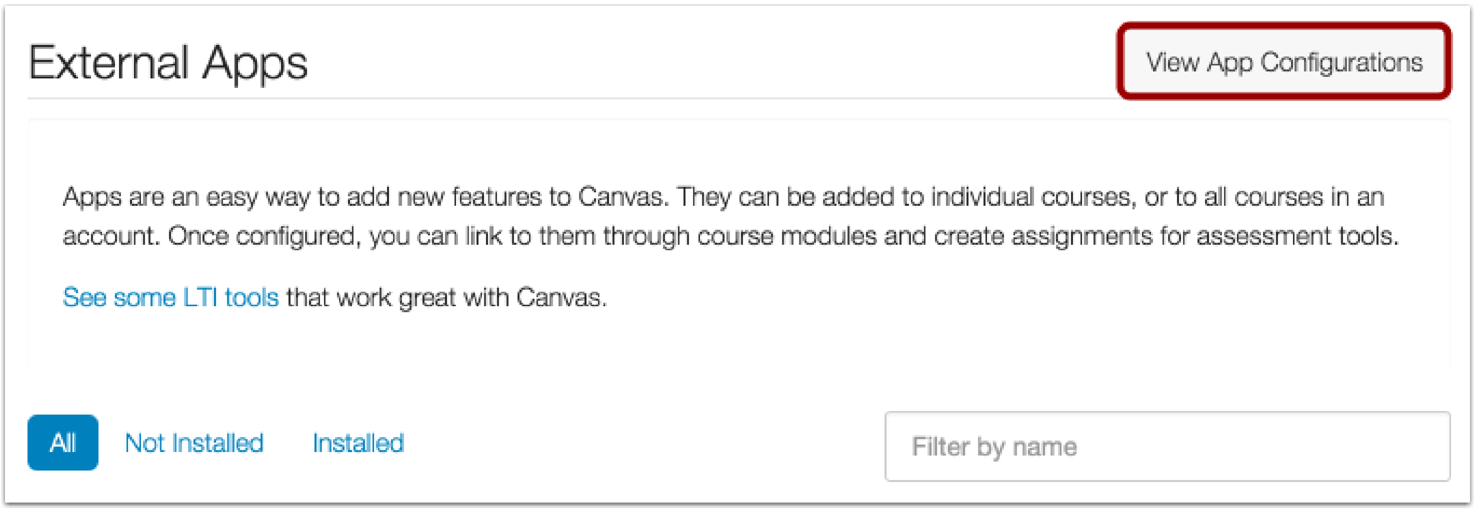
In Account Navigation, click the **Settings** link.

Open Apps



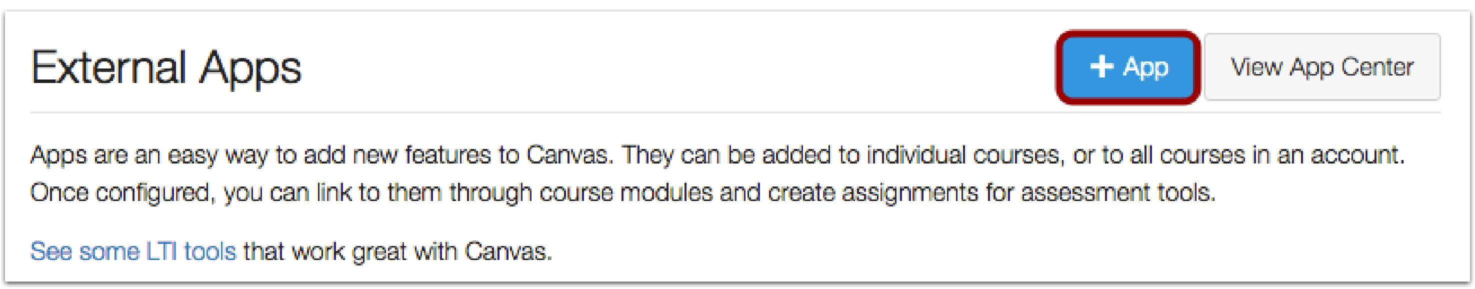
Click the **Apps** tab.

View App Configurations



To configure an app, click the **View App Configurations** button.

Add New App

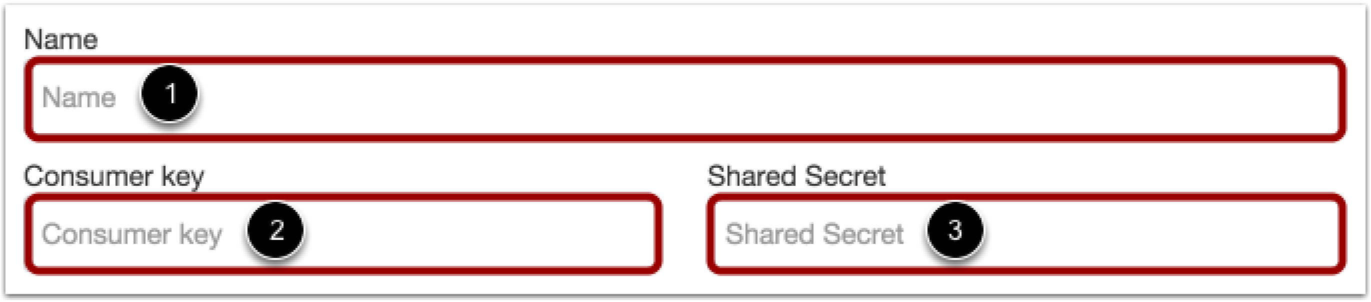


Click the **Add App** button.

Set Configuration Type

Select the Configuration Type drop-down menu and set the configuration type to **Paste XML.**

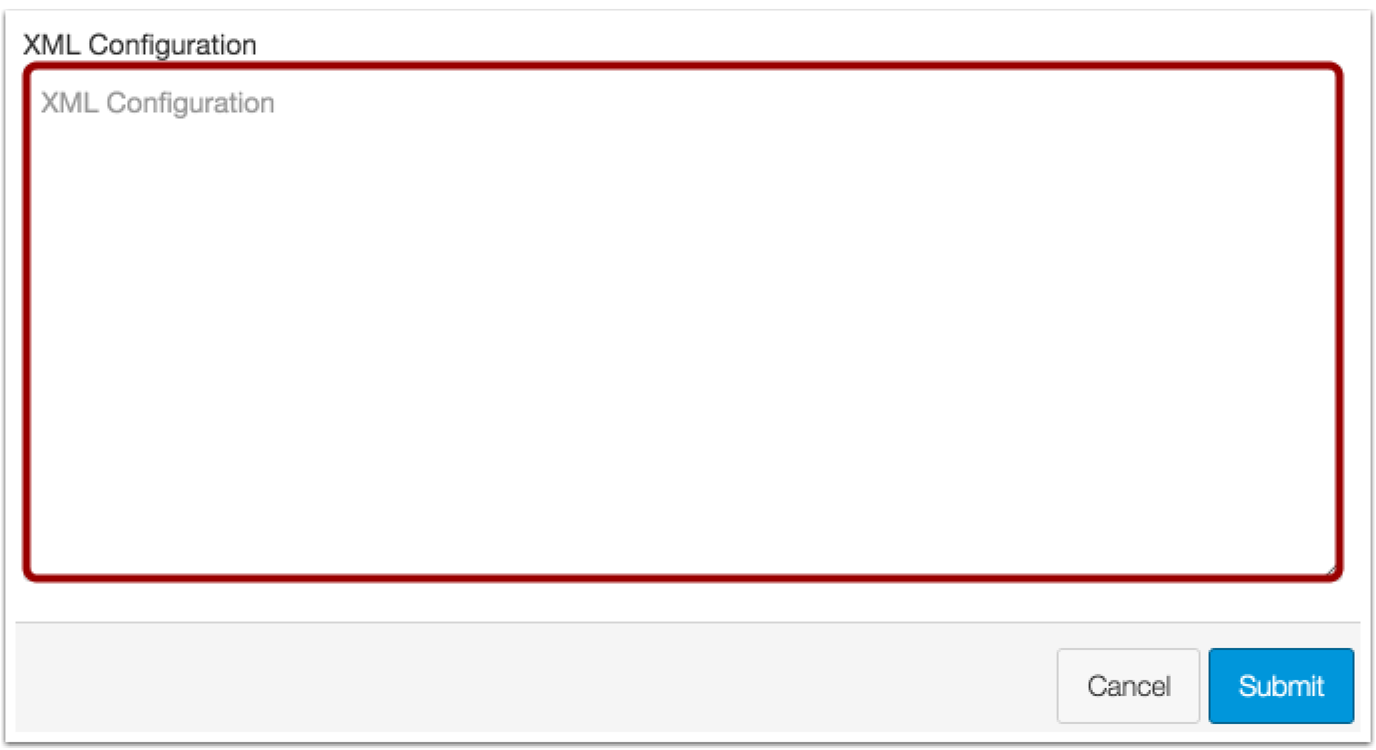
Add App Details



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) 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

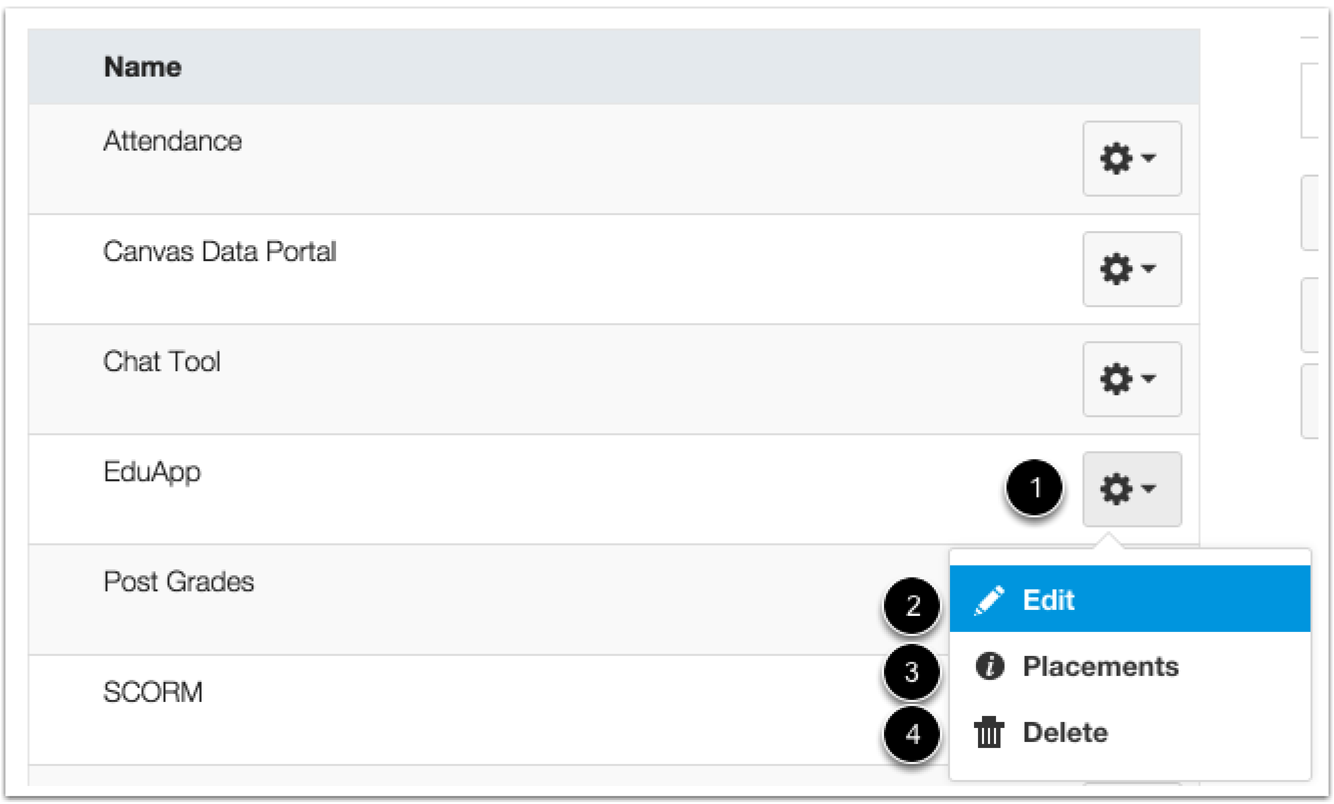


In the **XML Configuration** field, paste the XML code.

Submit App

Click the **Submit** button.

View App



View the External App.

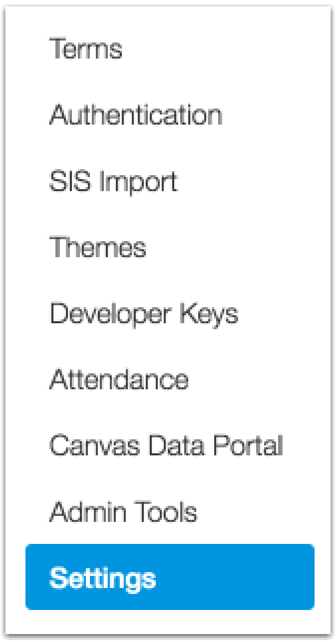
To edit, see the place(s) the app will appear, or delete the app, click the **Settings** icon [1]. To edit the app, click the **Edit** link [2]. To see the places the app will appear, click the **Placements** link [2]. To delete the app, click the **Delete** link [4].

How do I manually configure an 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.

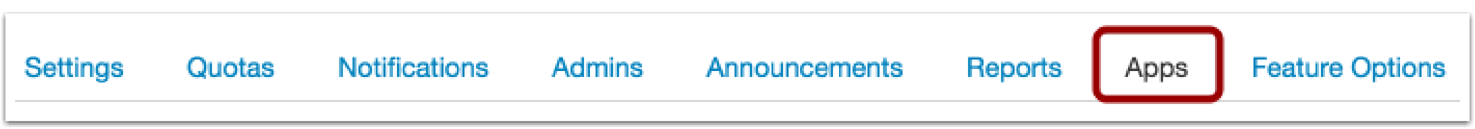
To learn more about configuring external apps, visit the Edu App Center.

Open Settings



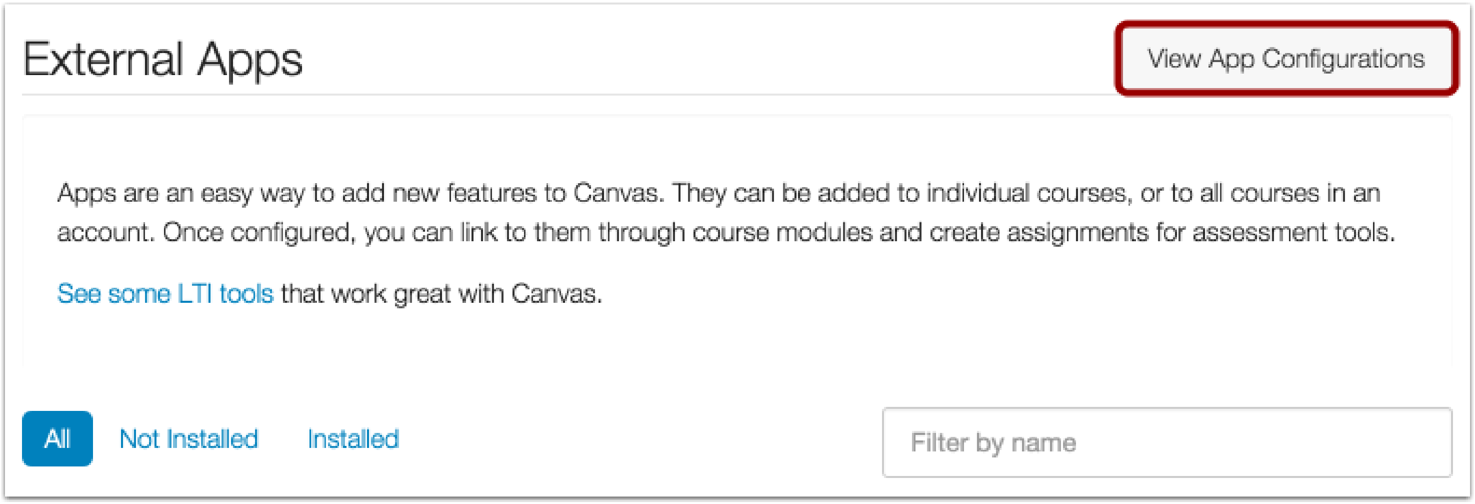
In Account Navigation, click the **Settings** link.

Open Apps



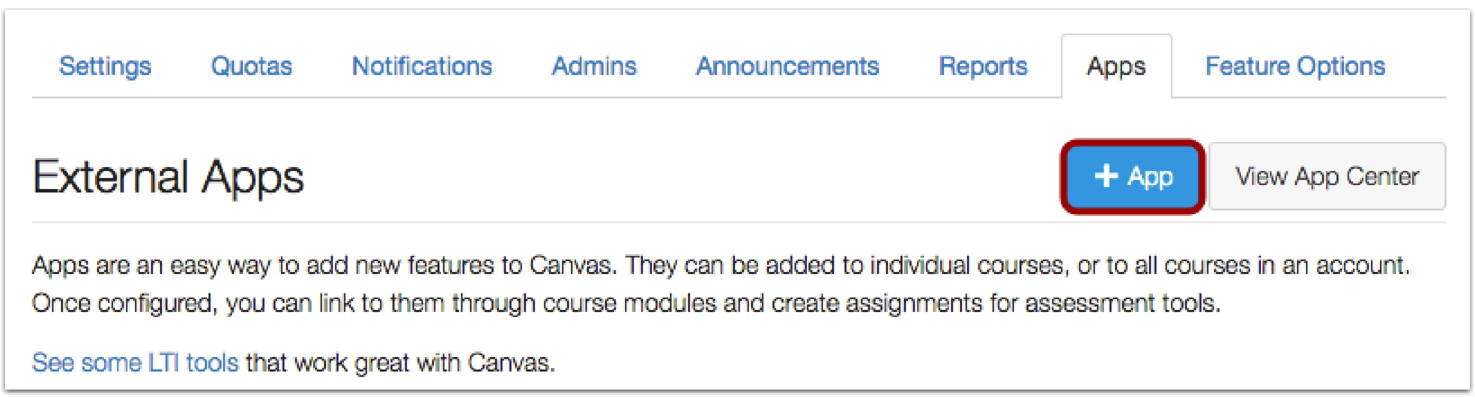
Click the **Apps** tab.

View App Configurations



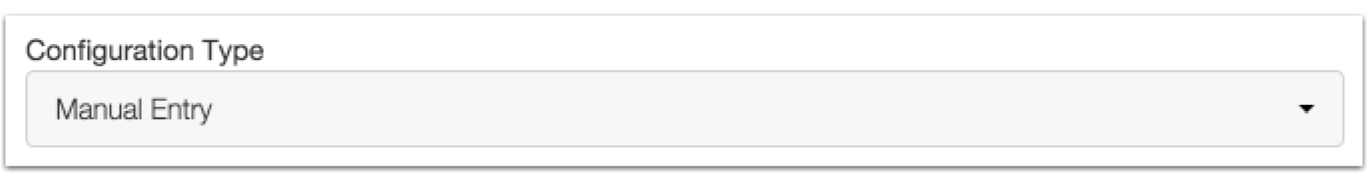
To configure an app, click the **View App Configurations** button.

Add App



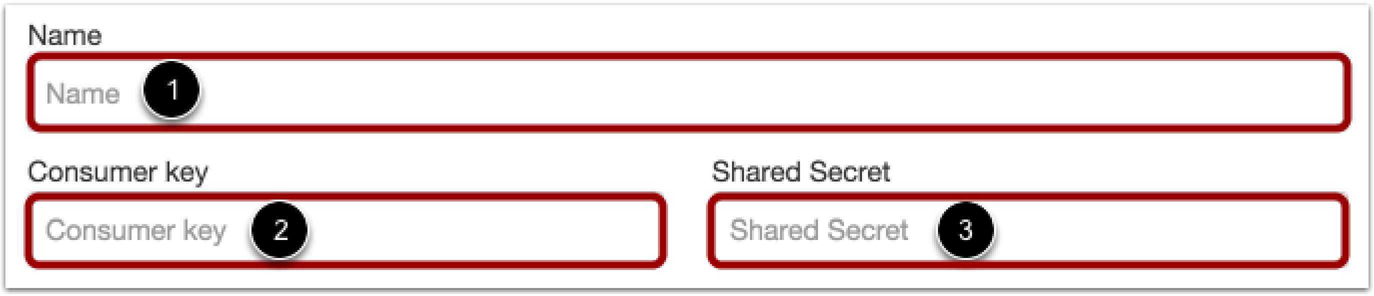
Click the **Add App** button.

Set Configuration Type



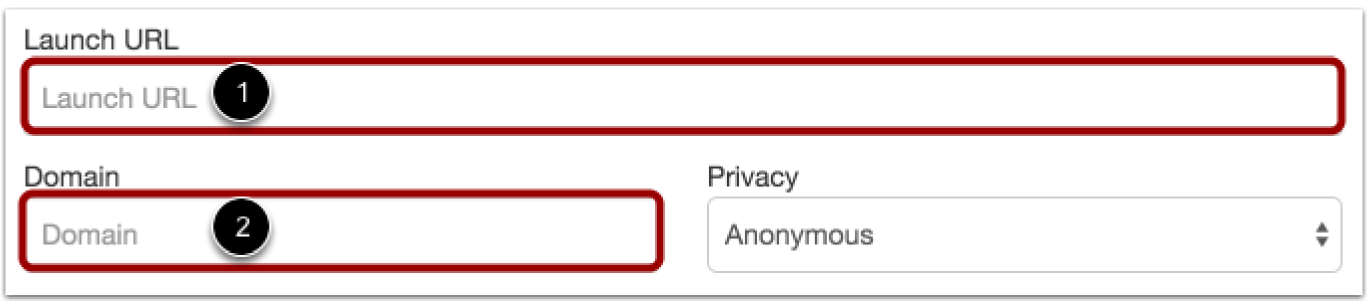
Select the Configuration Type drop-down menu and set the configuration type to **Manual Entry**.

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

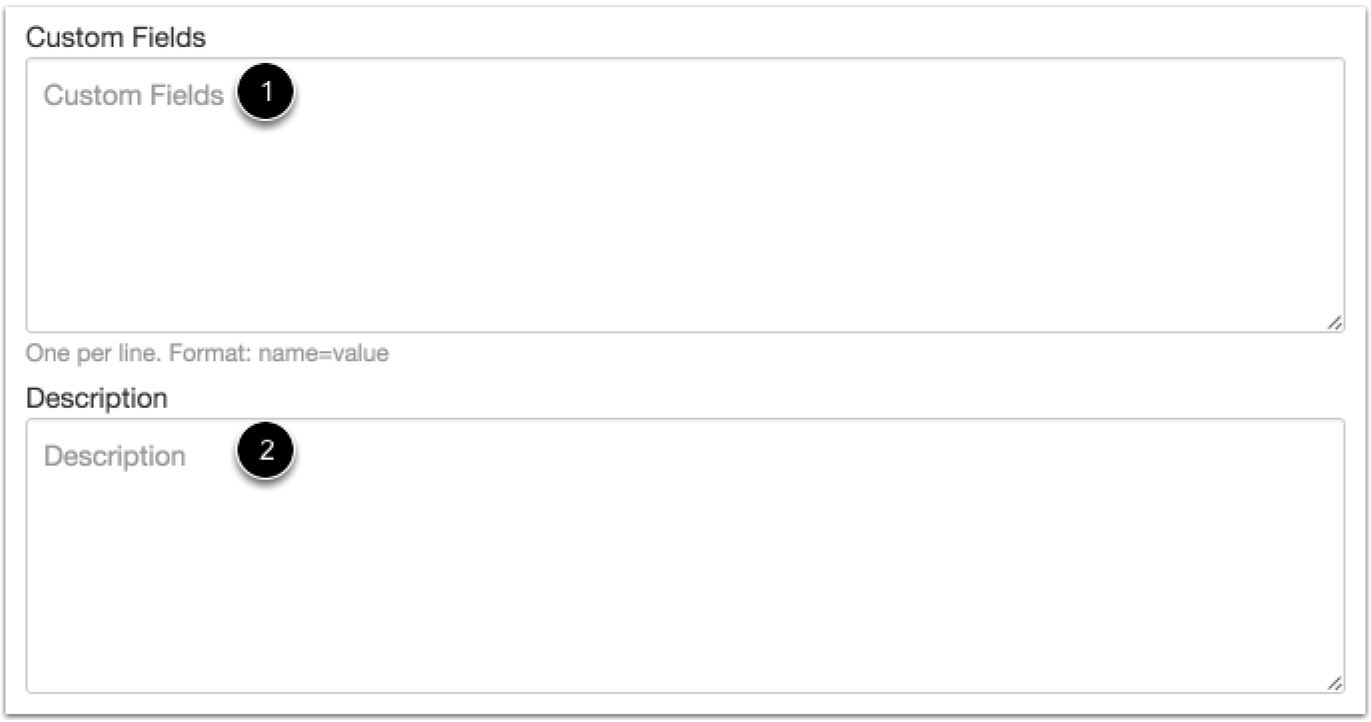
Note: These URLs must be iframed enabled and accept POST requests. Additionally, apps are configured and recommended to be entered as secure links (HTTPS).

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



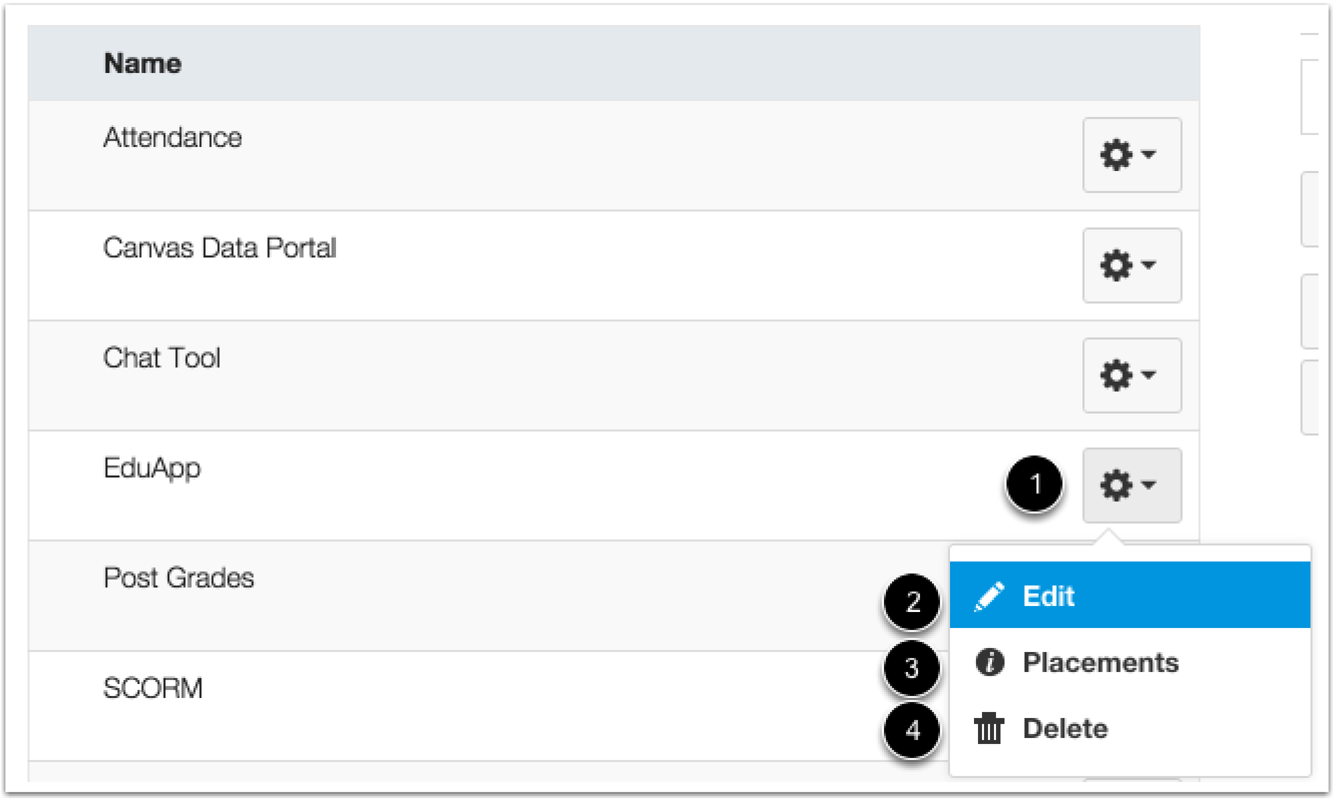
Type a custom field in **Custom Fields** [1]. Custom fields can be used to add extra parameters, such as making the tool appear in an embedded or mini state.

Type a description of the app in the **Description** field [2].

Submit App

Click the **Submit** button.

View App



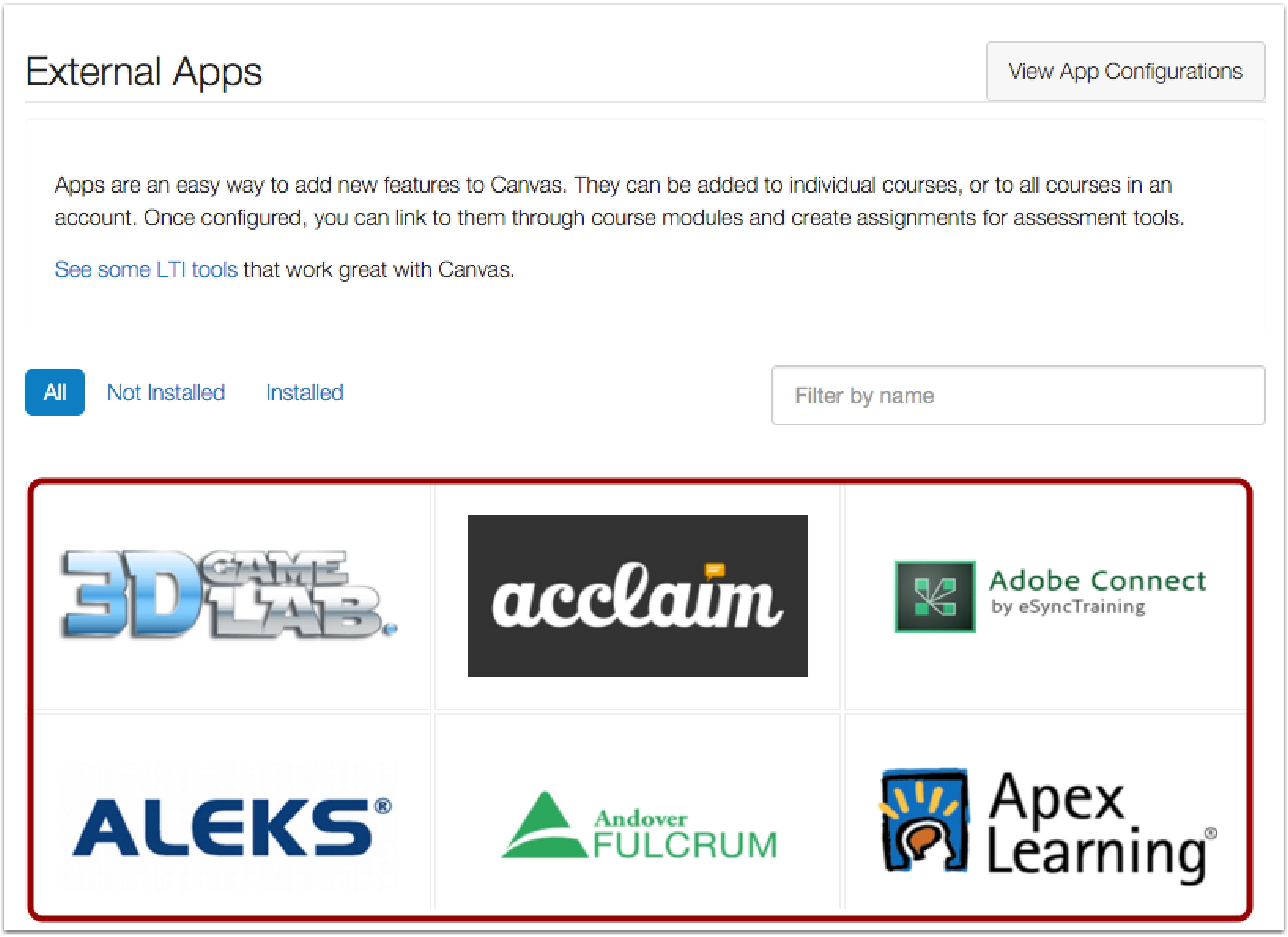
View the newly configured external app.

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 [2]. To delete the app, click the **Delete** link [4].

What is the Canvas App Center?

The Canvas App Center is your gateway to powerful teaching tools directly in Canvas and integrates the Edu App Center's external tools into your Canvas account. The App Center allows you to configure external apps without requiring manual configuration.

View Canvas App Center



The Canvas App Center is part of the Apps tab in both Account and Course Settings. It allows you to:

- Add new features to Canvas at the account or course level
- Configure apps to link to modules or assessments
- Install apps without the help of IT
- Created a customized teaching experience

- Open the door to more possibilities
- Filter apps by name
- View installed apps

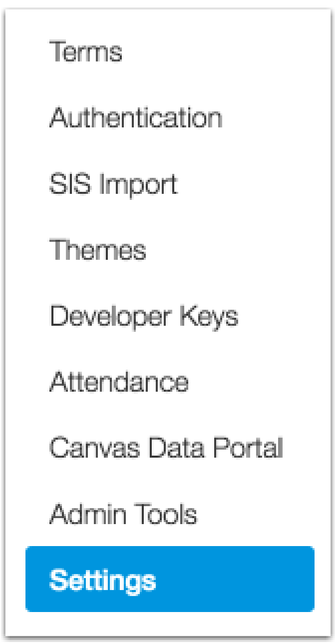
The App Center is part of the Apps tab in both Account and Course Settings.

Admins can manage the apps that can be used in courses for accounts and subaccounts by creating a whitelist in the Edu App Center and managing the whitelist in Canvas.

How do I use the Canvas App Center in an account?

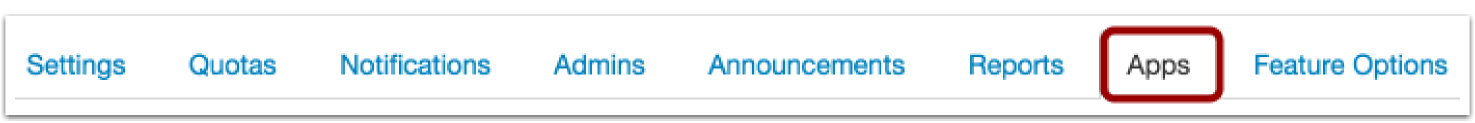
The App Center is your gateway to powerful teaching tools that are easily integrated into a Canvas account or Canvas course. Tools available at the account level are also available to all the courses in the account or sub-account.

Open Settings



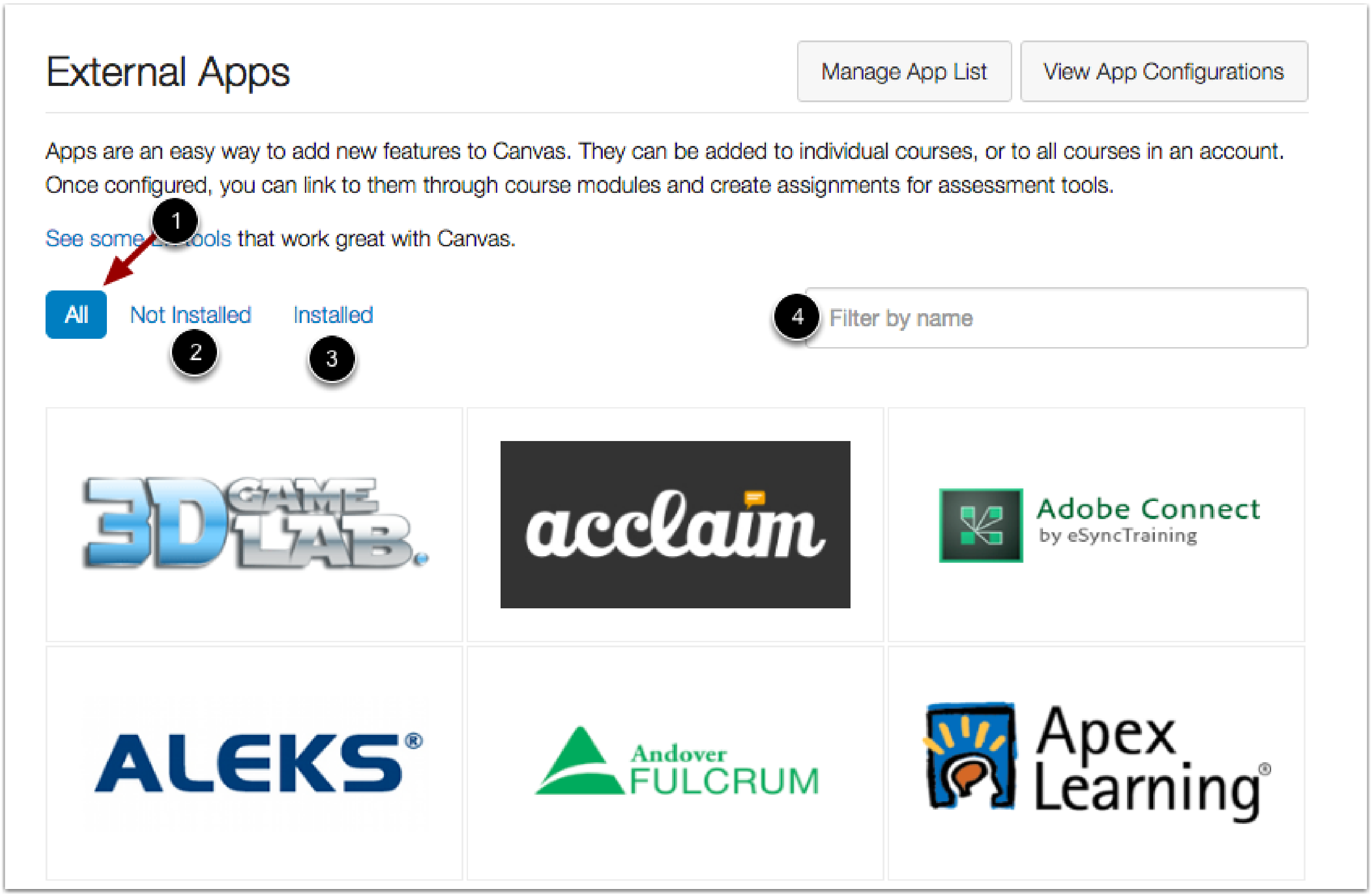
In Account Navigation, click **Settings** link.

Open Apps



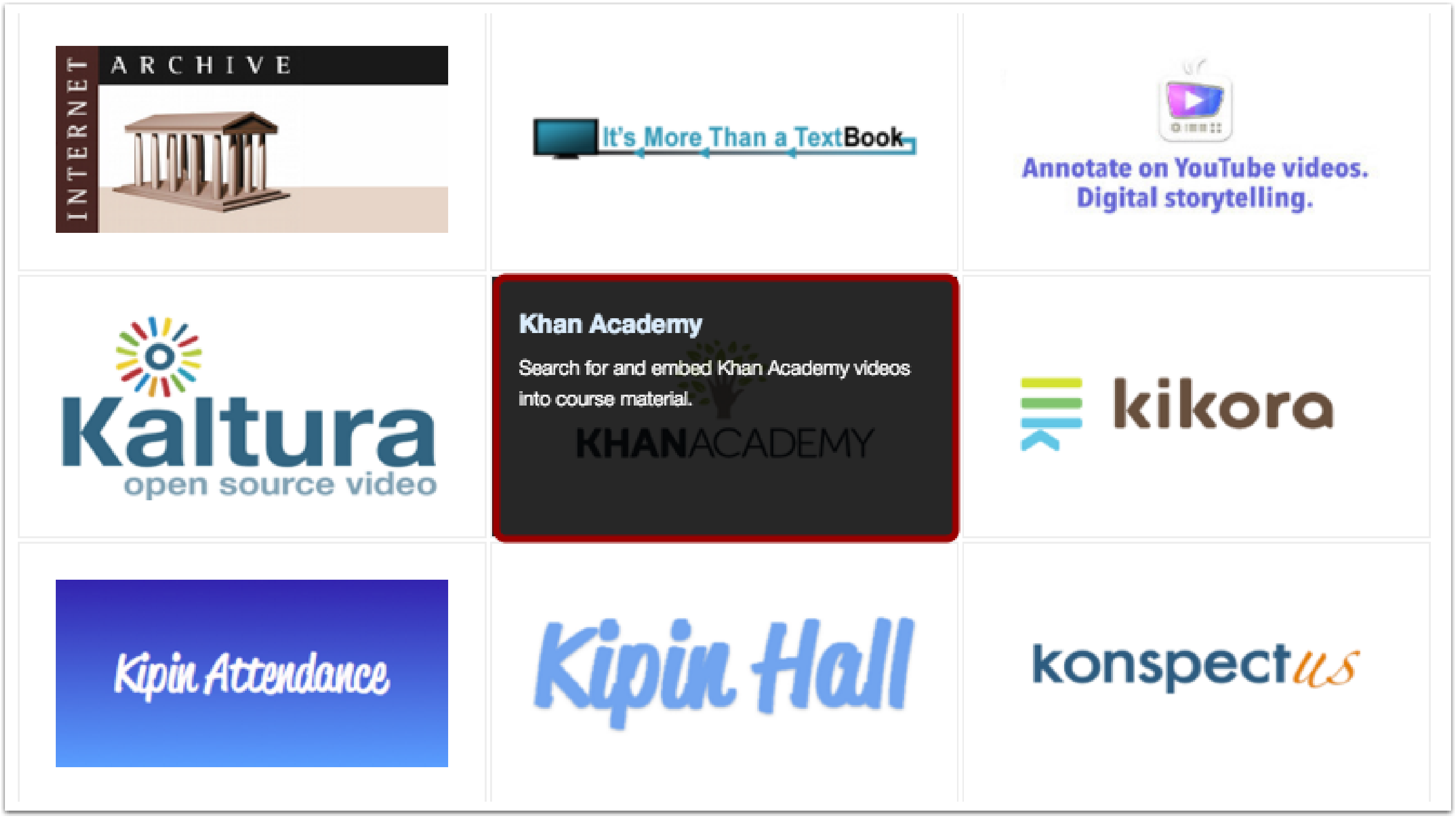
Click the **Apps** tab.

View App Center



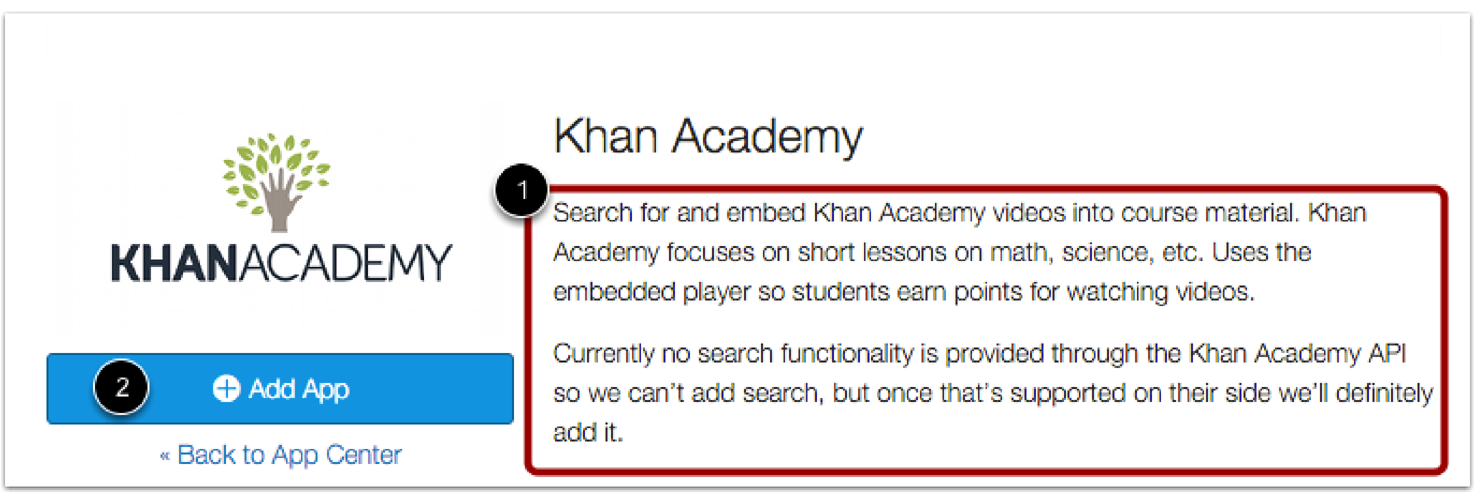
The App Center shows all apps available in your course [1]. You can also filter by installed [2] and not installed [3], or use the search field to locate a specific app [4].

View App



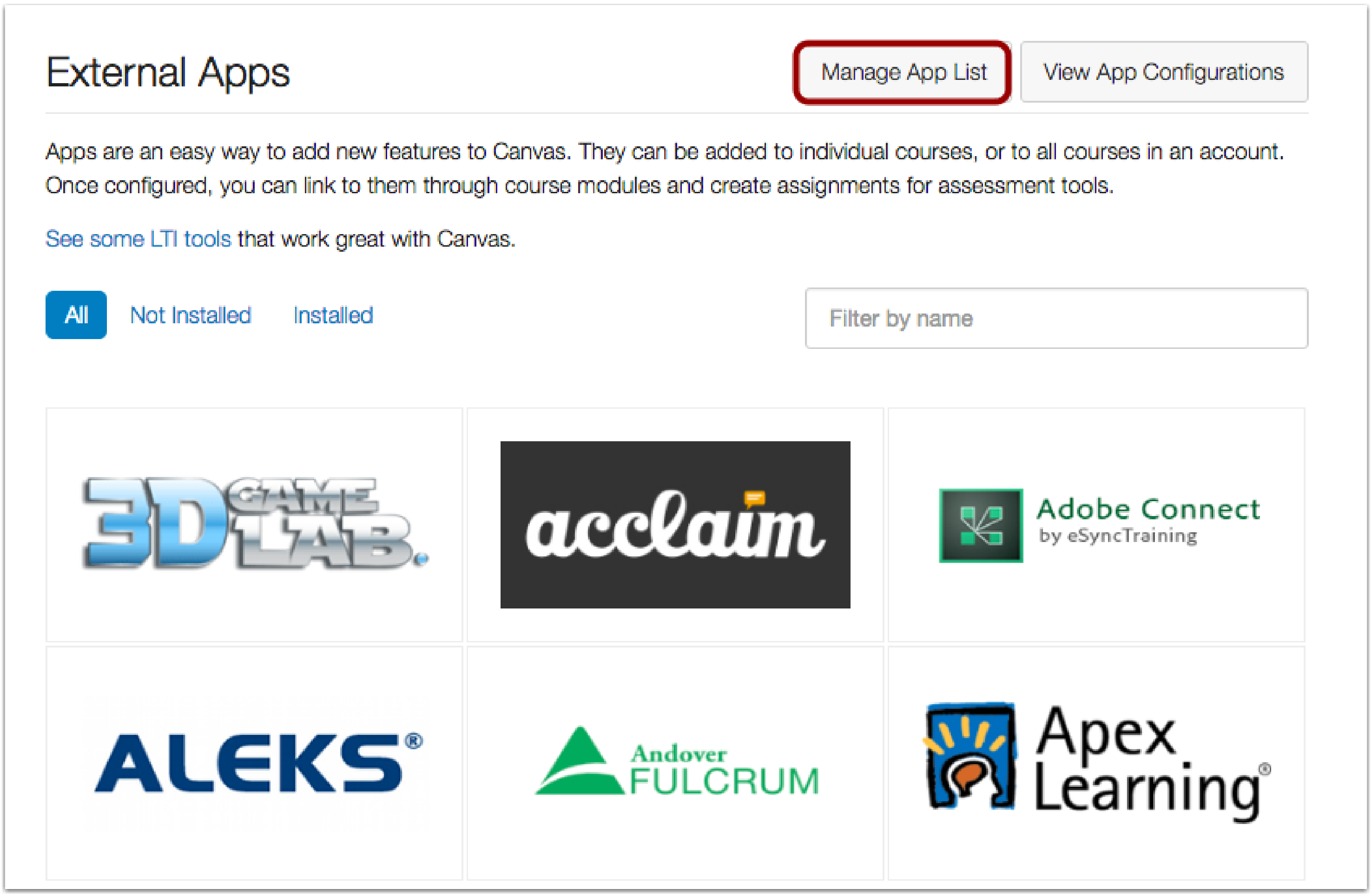
To view a quick description of an app, hover over the app. To view all details, click the app.

View App Details



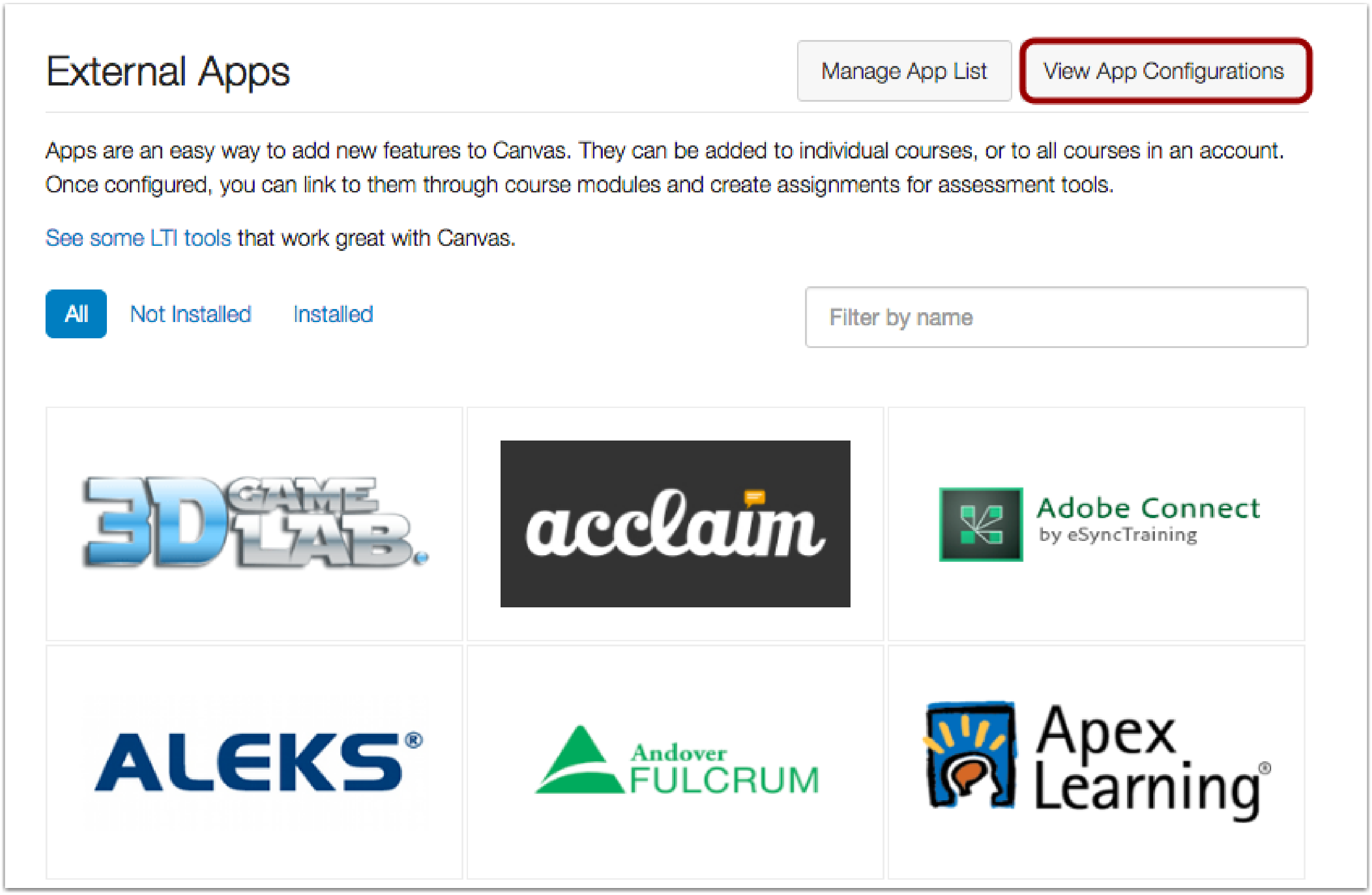
On the details page, you can view a full description of the app [1]. When you are ready to install the app with the proper credentials, you can add the app as a tool for your course [2].

Manage App List



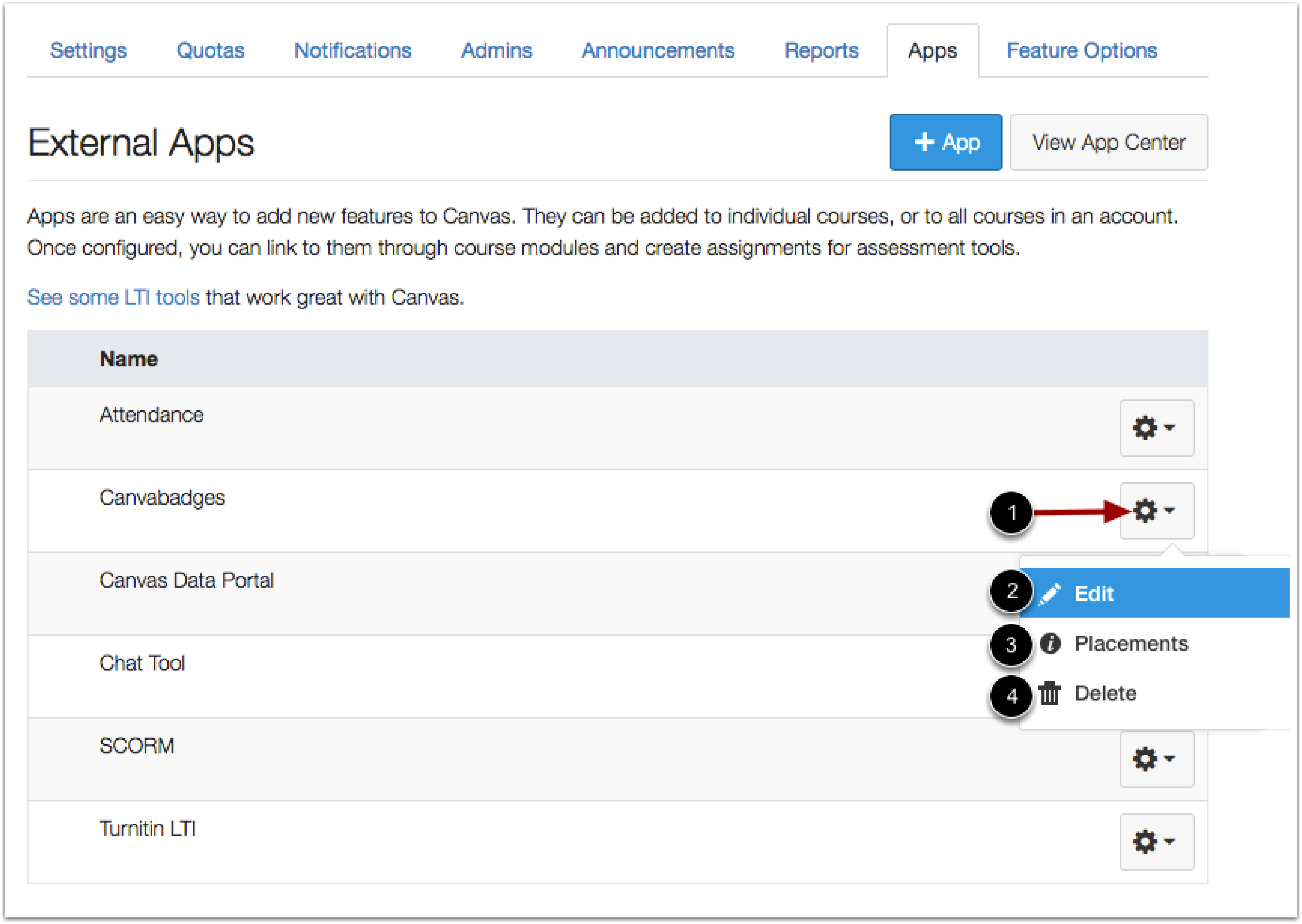
To manage your Edu App Center whitelist in Canvas, click the **Manage App List** button. The access token syncs the External Apps list at both the account and course levels to only show apps from the Edu App Center whitelist set up for the organization.

View App Configurations



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

Manage Apps



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

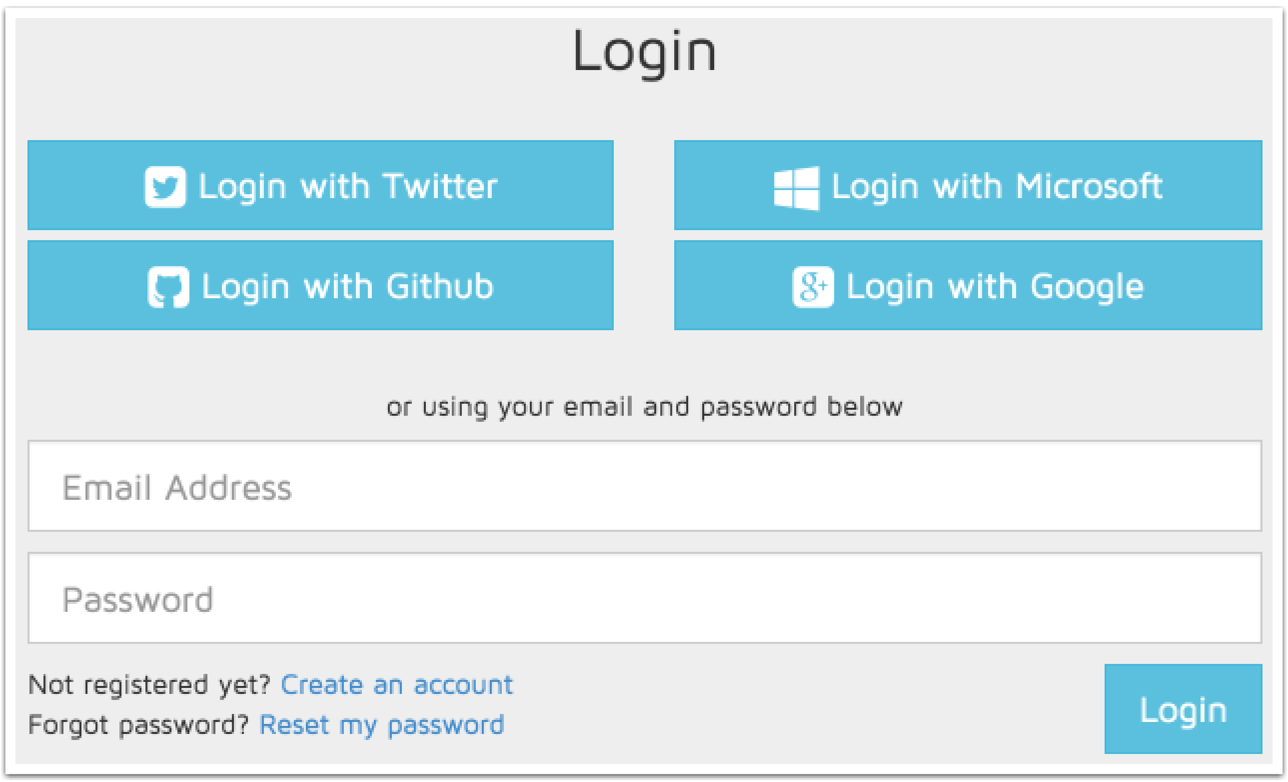
Note: At the course level, any apps added at the account level display a lock icon and cannot be edited.

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.

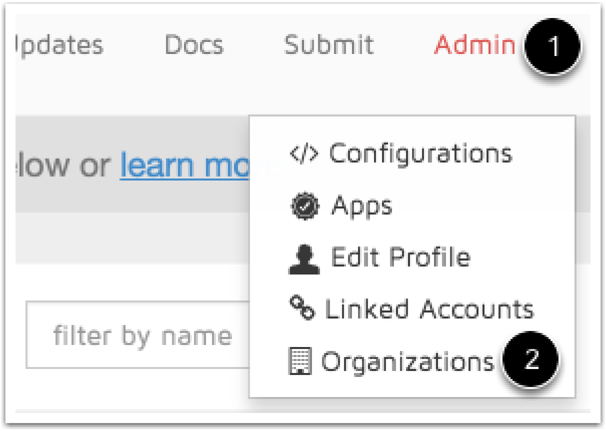
Log in to Edu App Center

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



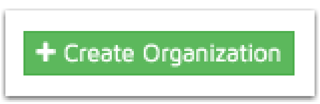
Select how you want to log in by choosing Twitter, Github, Microsoft, Google, or creating an account using an email.

Open Organizations



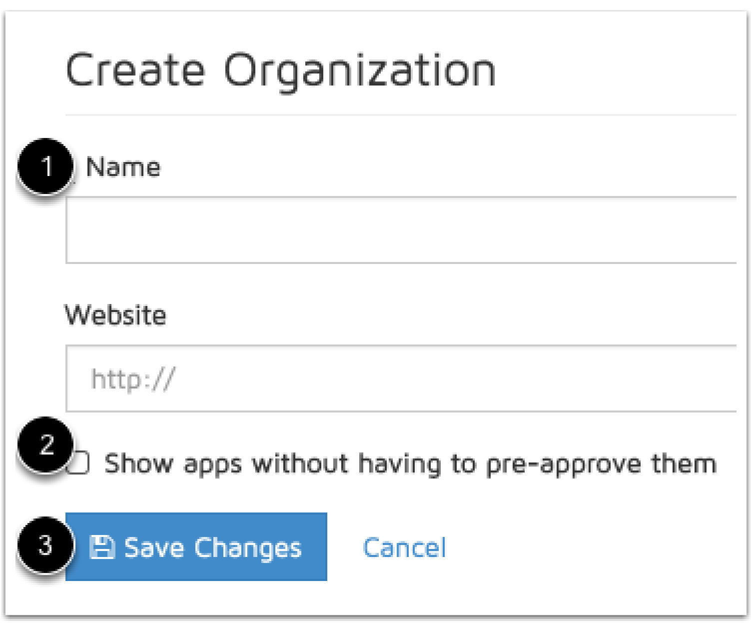
Click the **Admin** link [1]. In the drop-down menu, select the **Organizations** link [2].

Create Organization



Click the **Create Organization** button.

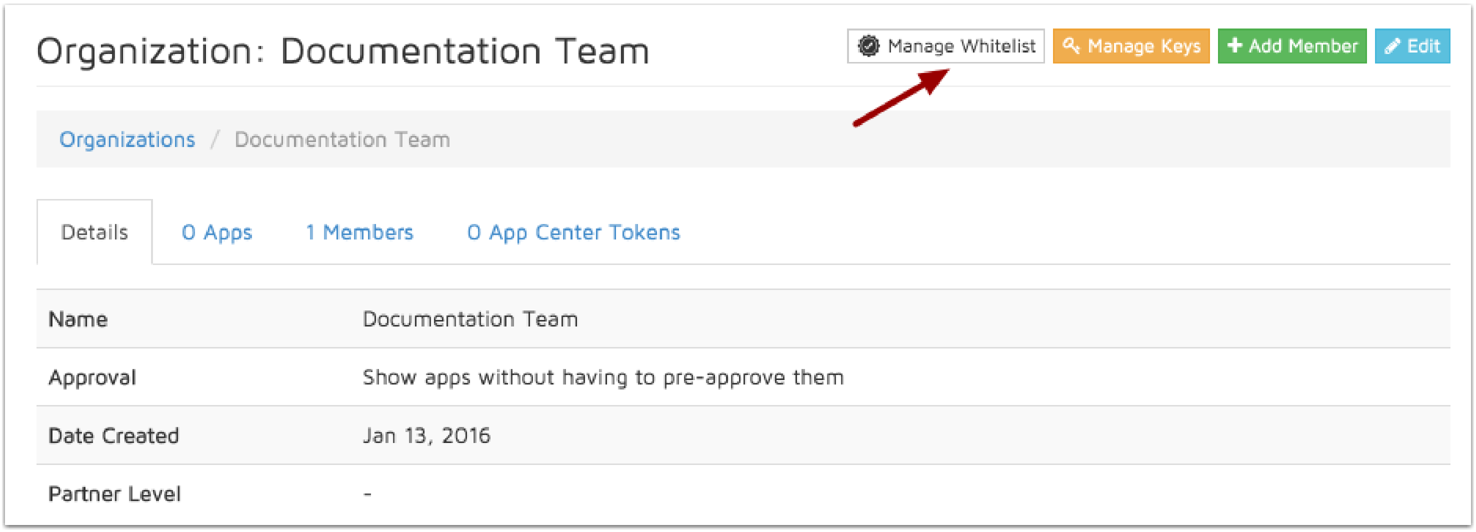
Enter Information



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

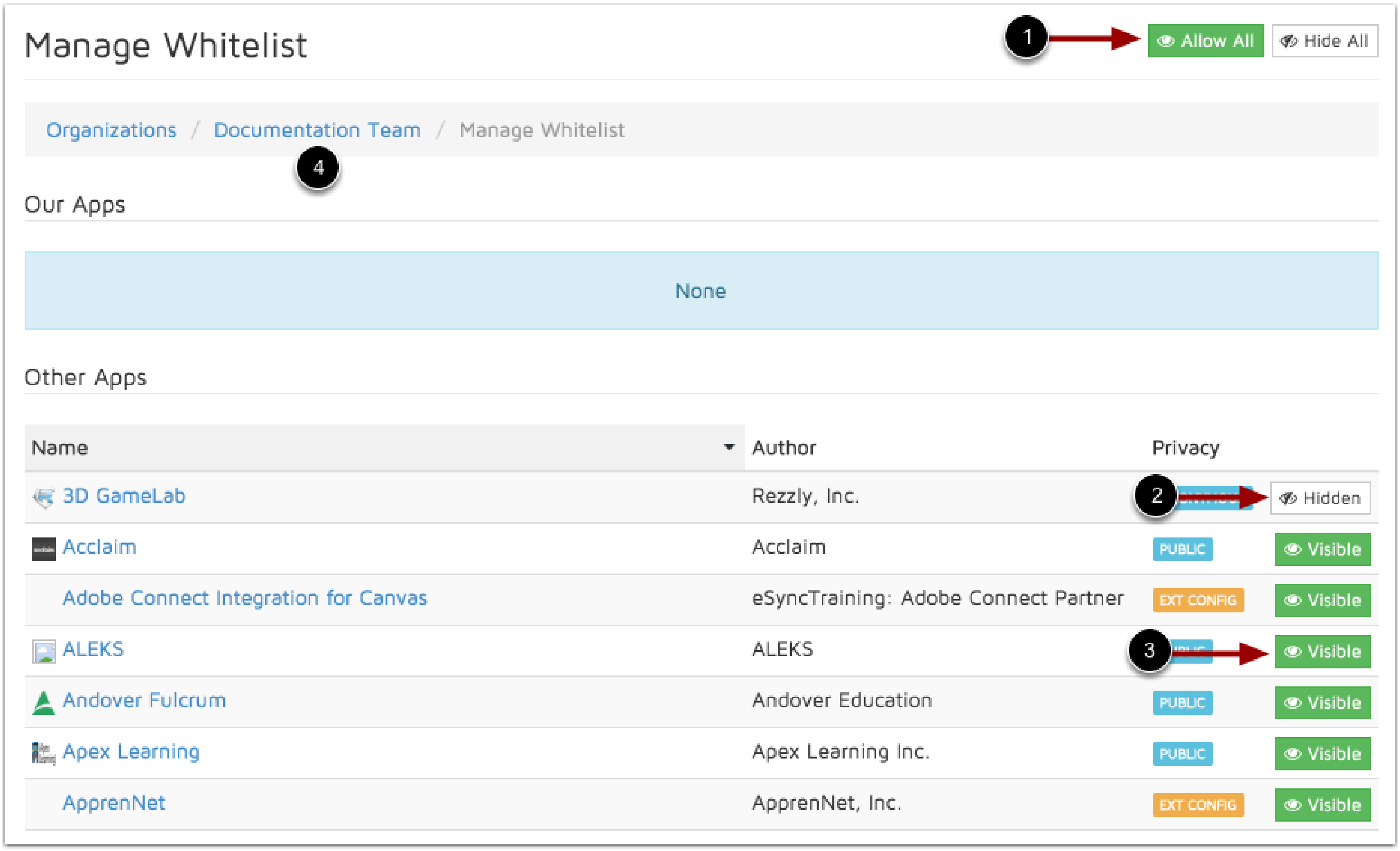
Click the **Save Changes** button [3].

Manage Whitelist



Click the **Manage Whitelist** button.

Manage Apps

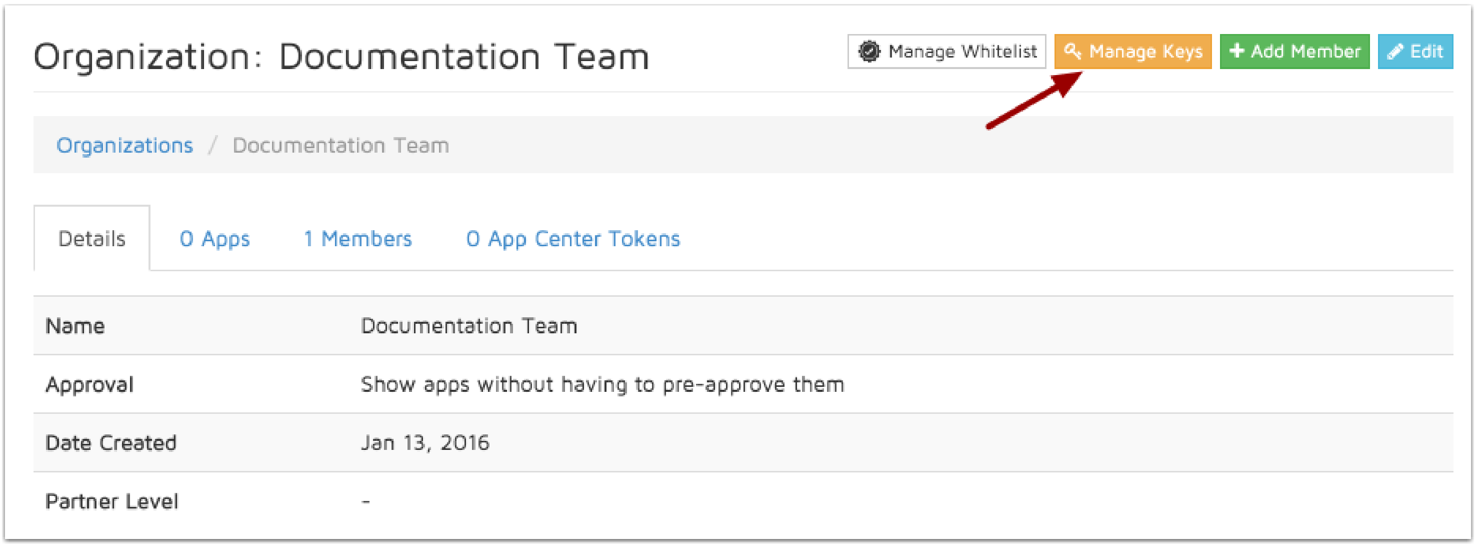


By default, all apps are hidden. Hidden apps do not appear in the app center list. You can show or hide all apps by clicking the **Allow All** or **Hide All** buttons [1].

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

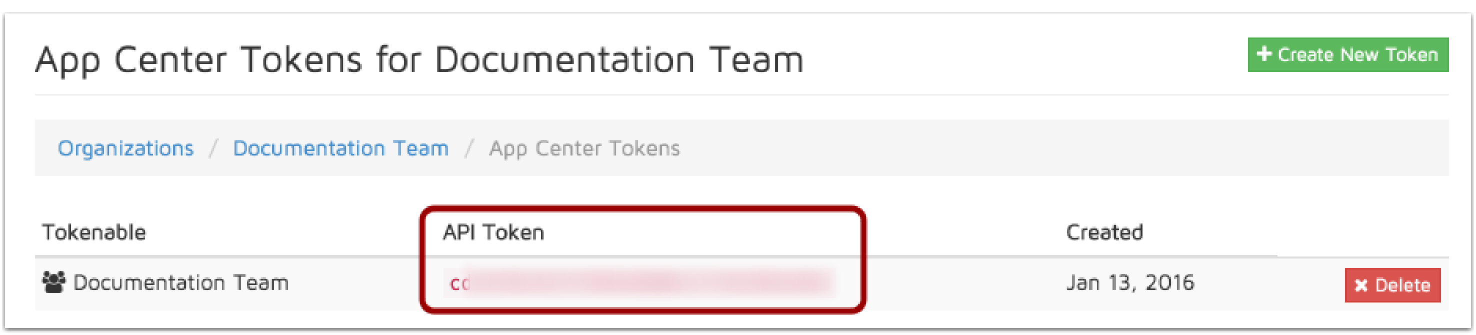


To create an API Token, click the **Manage Keys** button.

Create New Token

Click the **Create New Token** button.

Share API Token



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.

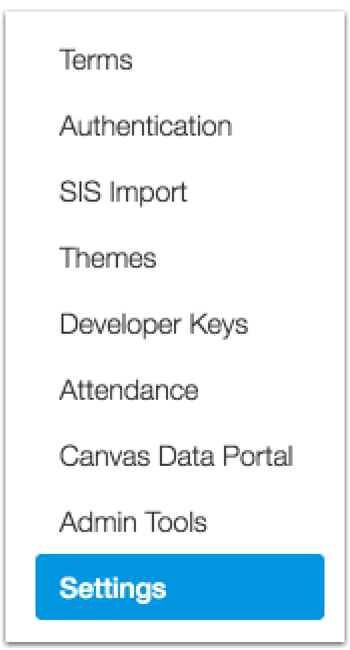
How do I manage an Edu App Center whitelist in Canvas?

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.

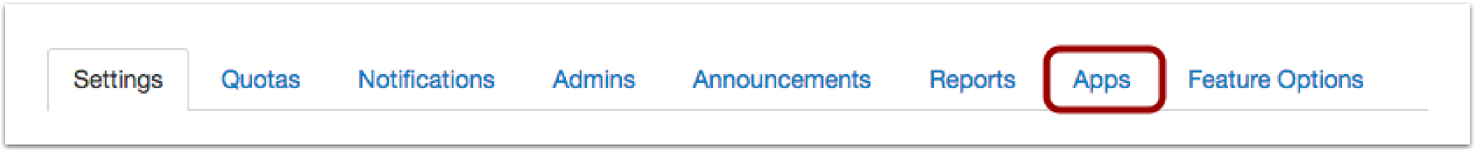
Canvas only accepts one API token for an organization. A token applied at the account level automatically filters down to to all subaccounts. The Edu App Center supports creating multiple tokens for an organization, but each token directs to the same whitelist. If you want to create separate whitelists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



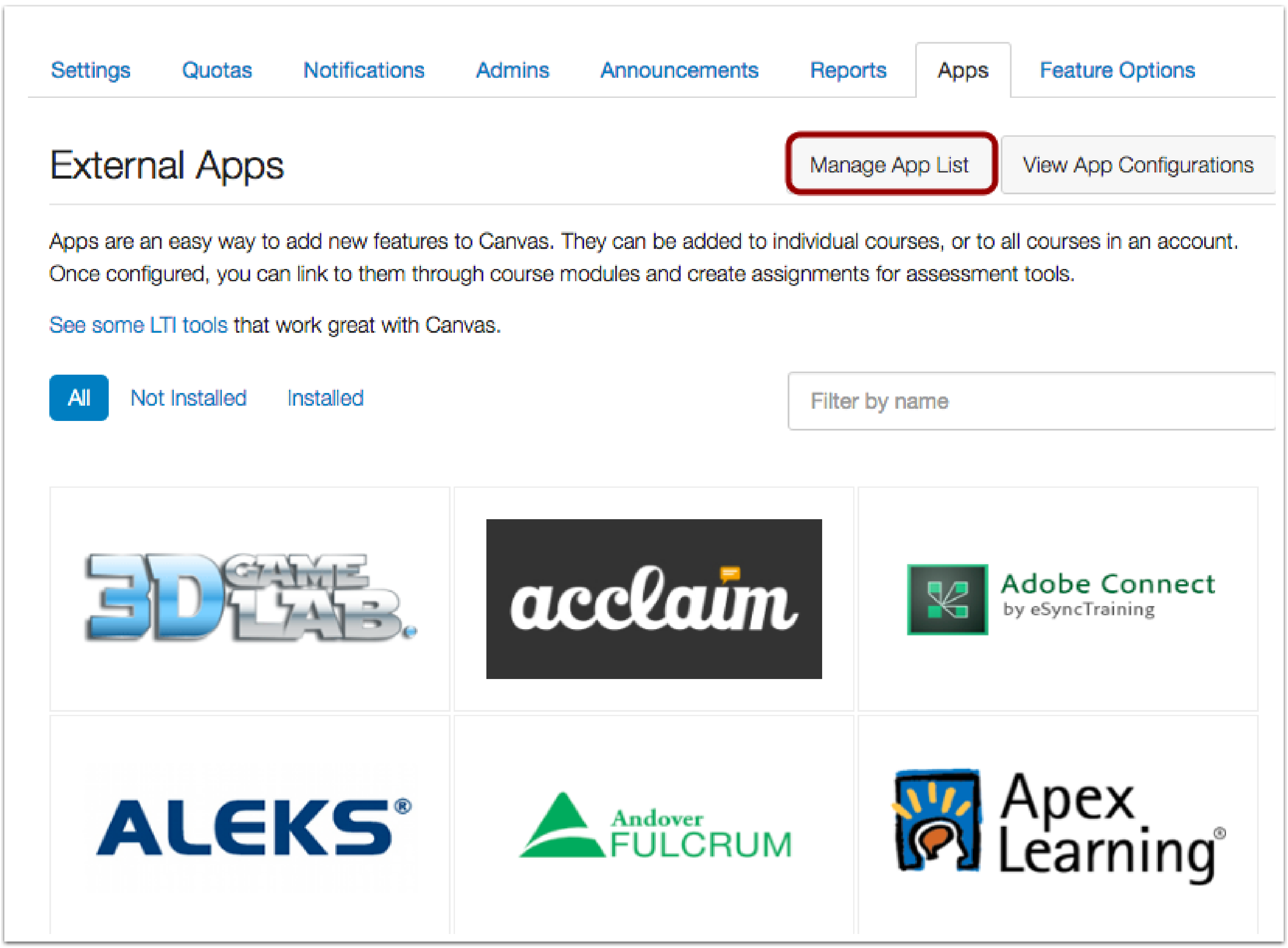
In Account Navigation, click the **Settings** link.

Open Apps



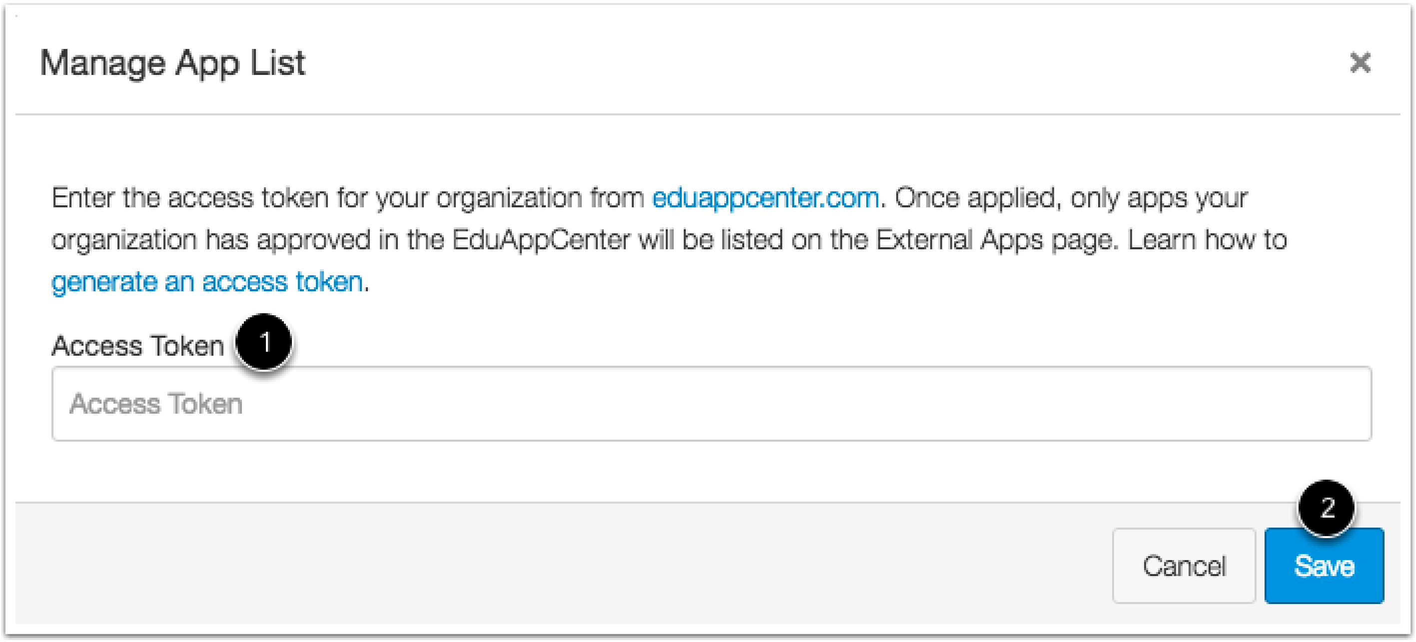
Click the **Apps** tab.

Manage App List



Click the **Manage App List** button.

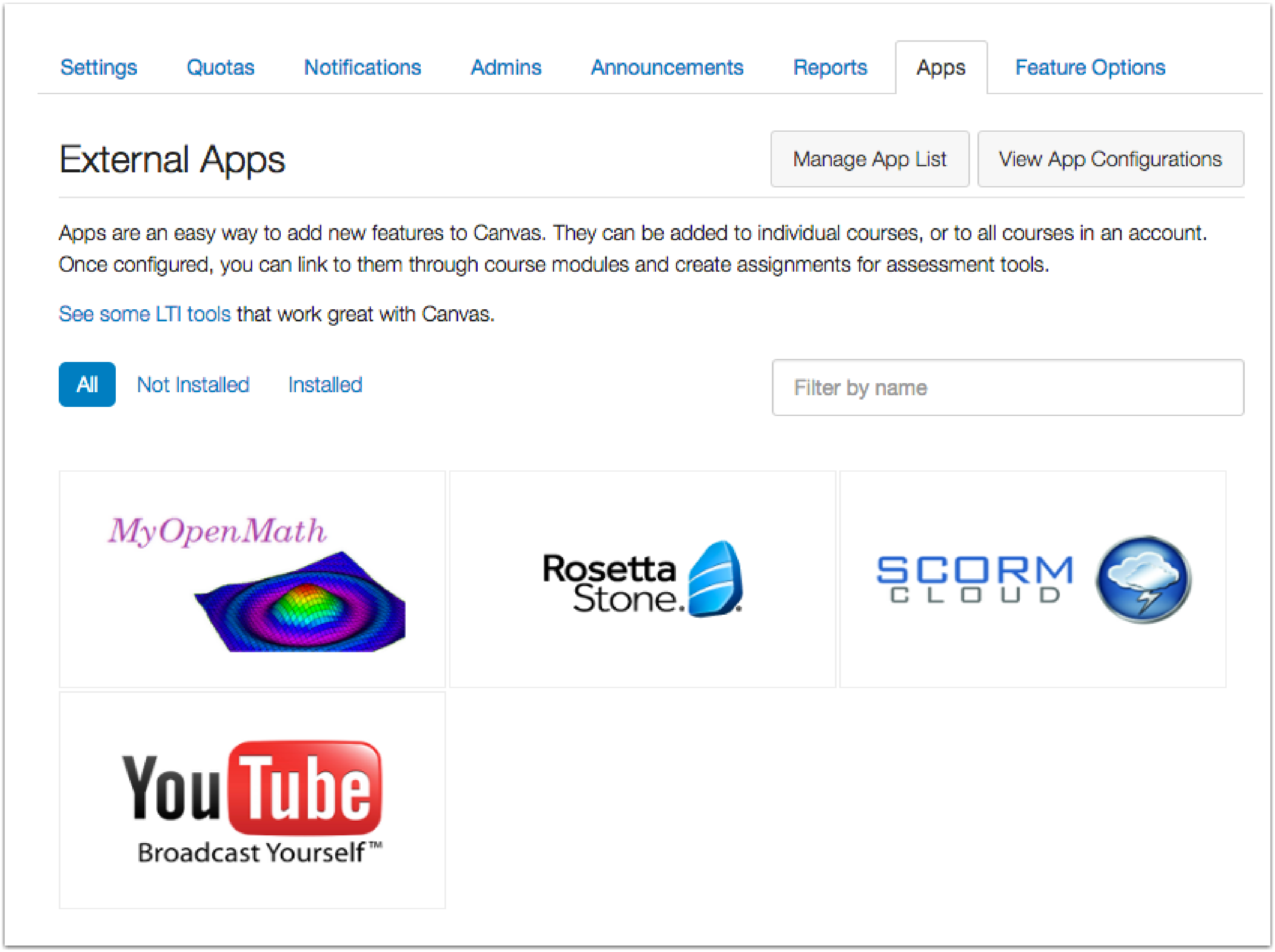
Enter API Token



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

Click the **Save** button [2].

View Apps



View the list of approved apps from your whitelist.

Grading

What are account-level grading schemes?

A grading scheme is a set of criteria that measures varying levels of achievement in a course. Account-level grading schemes are grading schemes that can be defined at the account or sub-account level for the entire institution. On a course level, instructors can apply grading schemes to both students' final grades and individual assignments. Without a grading scheme, scores are not measured against any specific standard.

Learn how to create and view grading schemes.

Notes:

- Account-level grading schemes automatically appear within all courses in the account. When an instructor links a grading scheme created at the account level, the grading scheme is linked, not imported, as a new scheme on the course level. Grading schemes imported from the account level can only be modified by users with grading scheme permissions.
- Grading schemes created at the account level automatically appear on the sub-account level.

Common Grading Schemes

Grading schemes are built based on percentage ranges, and each percentage range is assigned a name value. You can create any type of grading scheme by editing the name and percentage range for each item.

Notes about Grading Schemes:

- Grading schemes only support two decimal places.
- The only scores allowed in the Gradebook are those defined in the grading scheme.
- Gradebook entries that are not specifically defined in the grading scheme display a dash.

To see how grading schemes play a role in course grades and assignments, please view the instructor grading scheme lesson.

Letter Grades

Letter Grades

Name	Range	
A	100%	to 94%
A-	< 94%	to 90%
B+	< 90%	to 87%
B	< 87%	to 84%
B-	< 84%	to 80%
C+	< 80%	to 77%
C	< 77%	to 74%
C-	< 74%	to 70%
D+	< 70%	to 67%
D	< 67%	to 64%
D-	< 64%	to 61%
F	< 61%	to 0%

Letter Grades is the most traditional type of grading scheme and is the default format for new grading schemes. Remember, only supported scores are allowed in the Gradebook, so if you build a letter grade scheme with name values for only A, B, and C, you cannot enter a score that converts to an A- or B+.

In the Gradebook, scores are inputted by point value, percentage, or letter grade. For instance, if an assignment is worth 10 points and the student earns 9, you can input 9 or 90% (which will display as an A- as defined in the percentage range). You can also input an A- directly.

GPA Scale

GPA Scale

Name	Range	
4.0	100%	to 93%
3.7	< 93%	to 90%
3.3	< 90%	to 87%
3.0	< 87%	to 83%
2.7	< 83%	to 80%
2.3	< 80%	to 77%
2.0	< 77%	to 73%
1.7	< 73%	to 70%
1.3	< 70%	to 67%
1.0	< 67%	to 65%
0	< 65%	to 0%

GPA Scale Grading is designed for schools that use a 4.0 scale (or 5.0/6.0). GPA Scale calculations may vary by institution. This scheme is similar to the Letter Grade scheme, but letter grades can also be used. Remember, only supported scores are allowed in the Gradebook, so if you build a GPA scheme with name values for only 4.0 and 3.9, you cannot enter a score of 3.95.

In the Gradebook, scores are inputted by percentage or GPA value. For instance, if an assignment is worth 10 points and the student earns 9, you can input 90% (which will display as a 3.7 as defined in the percentage range). You can also input 3.7 directly. Inputting a 9 will not work.

Performance

Performance

Name	Range	
Excellent	100%	to 90%
Good	< 90%	to 80%
Fair	< 80%	to 70%
Poor	< 70%	to 60%
Fail	< 60%	to 0%

Performance grading schemes are based on a standard of individual performance. Remember, only supported scores are allowed in the Gradebook, so if you build a performance scheme with the name values of only Excellent and Poor, you cannot enter a score of Good.

In the Gradebook, scores are inputted by points, percentage, or performance value. For instance, if an assignment is worth 10 points and the student earns 9, you can input 9 or 90% (which will display as Excellent as defined in the percentage range). You can also input *Excellent* directly.

How do I create a grading scheme in an account?

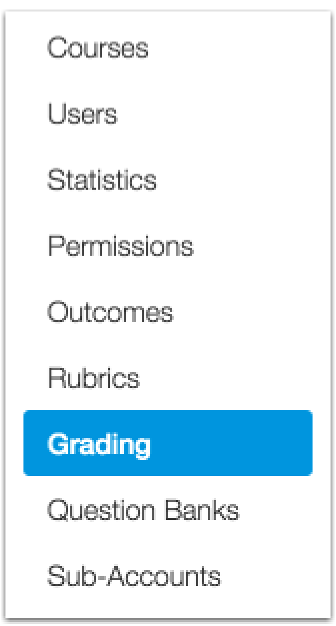
On the account level, you can create grading schemes for your entire institution. View examples of common grading schemes.

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.

View a video about Grading Schemes.

Note: Any grading schemes you create on the account level will also display within sub-accounts.

Open Grading



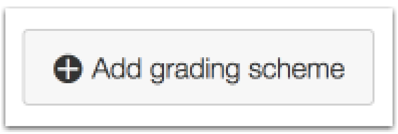
In Account Navigation, click the **Grading** link.

Open Grading Schemes

Click the **Grading Schemes** tab.

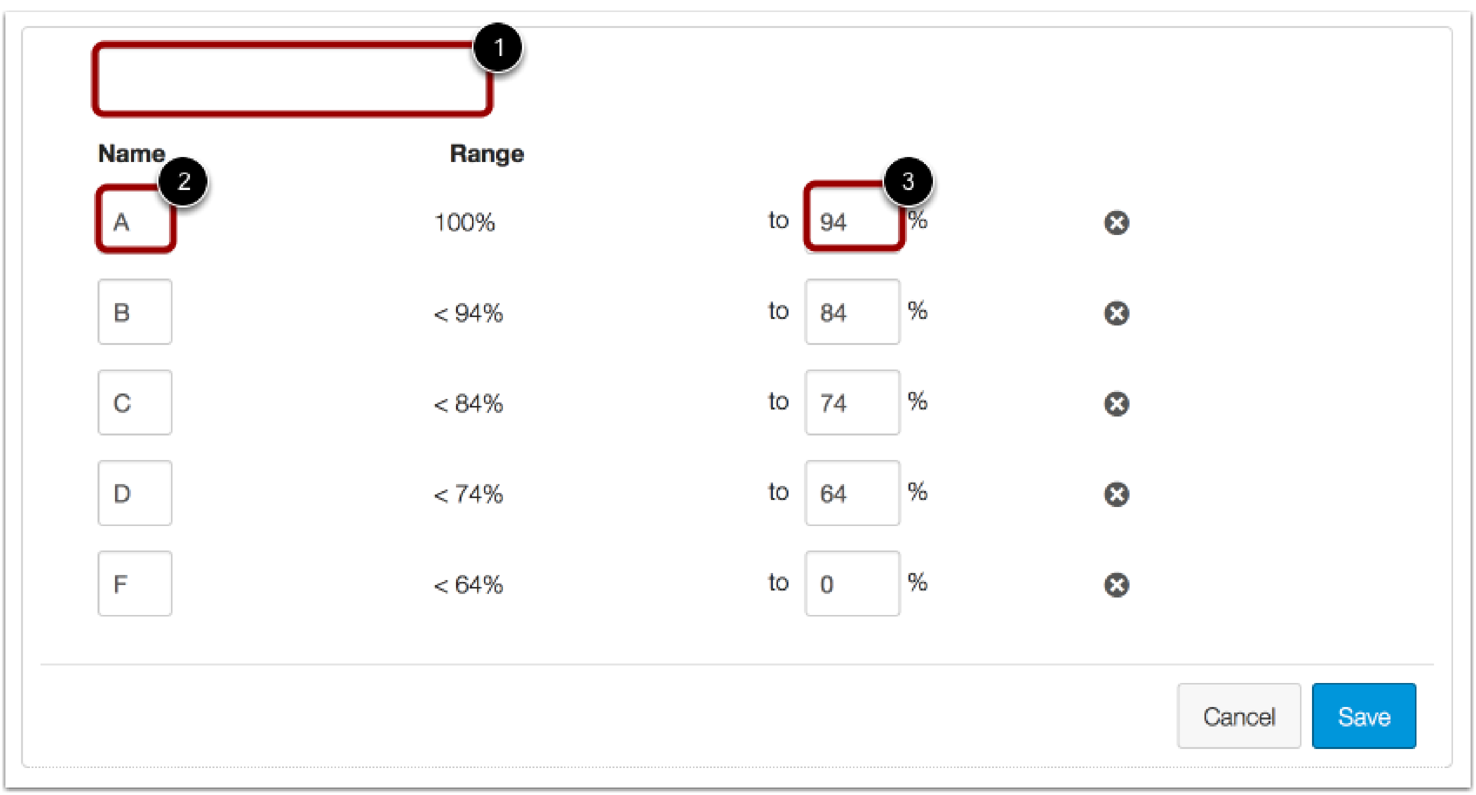
Note: You will see Grading Periods and Grading Schemes tabs if the [Multiple Grading Periods feature option] is enabled.

Add Grading Scheme

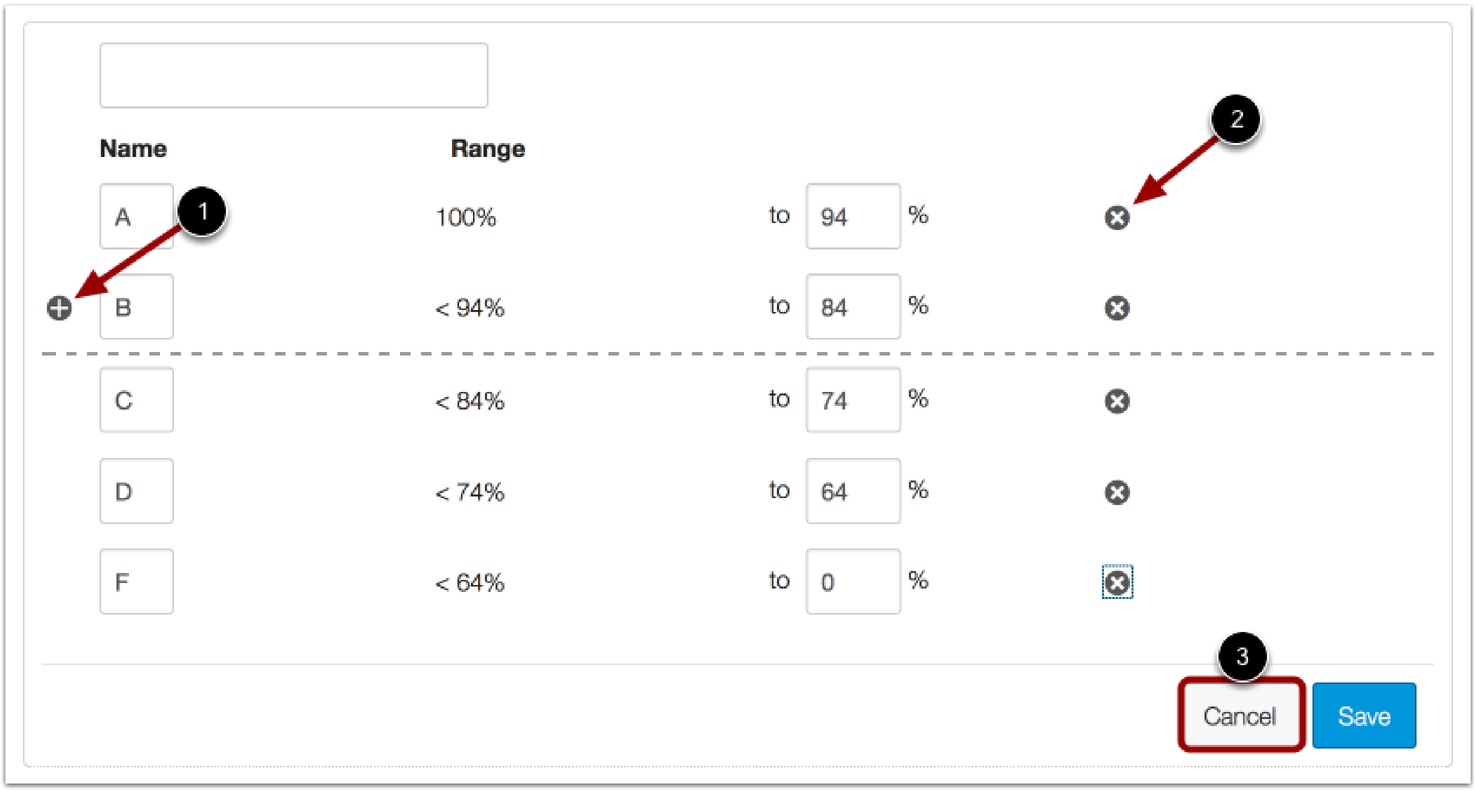


Click the **Add Grading Scheme** button.

Edit Grading Scheme

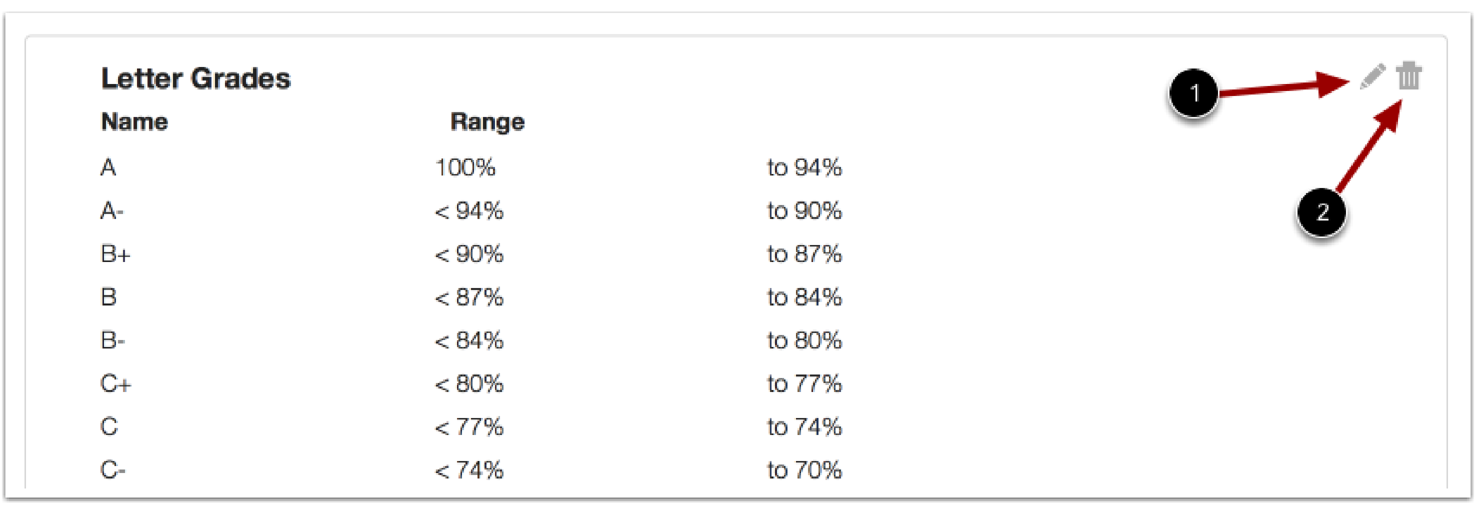


Create a title in the Scheme Name field [1]. For each line item, edit the grading scheme name in the name field [2]. Edit the minimum end of each individual range in the To [Number] % field [3].



If you need to add ranges, place your cursor to the left of a range checkbox and click the **Add** icon [1] when it appears. You can remove individual ranges by clicking the **Remove** icon [2]. When you are finished editing your grading scheme, click the **Save** button [3].

Modify Grading Scheme



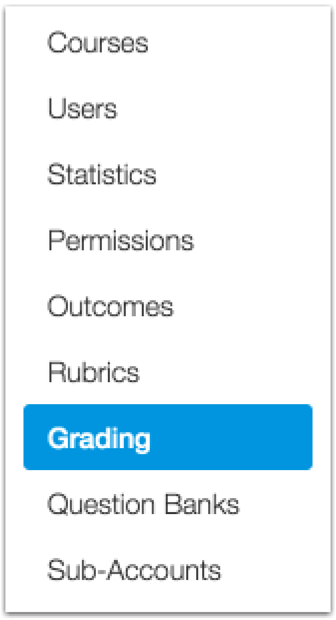
Your new grading scheme will appear underneath any previously used grading schemes. If you are able to edit the grading scheme, you can edit the scheme by clicking the **Edit** icon [1]. To delete a grading scheme, click the **Delete** icon [2].

How do I delete a grading scheme in an account?

You can delete a grading scheme in your Account Settings.

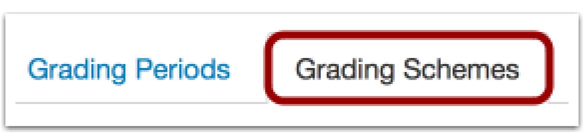
Note: If you delete an account-level grading scheme that has been enabled at the course level, the grading scheme will not be deleted from the course.

Open Grading



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

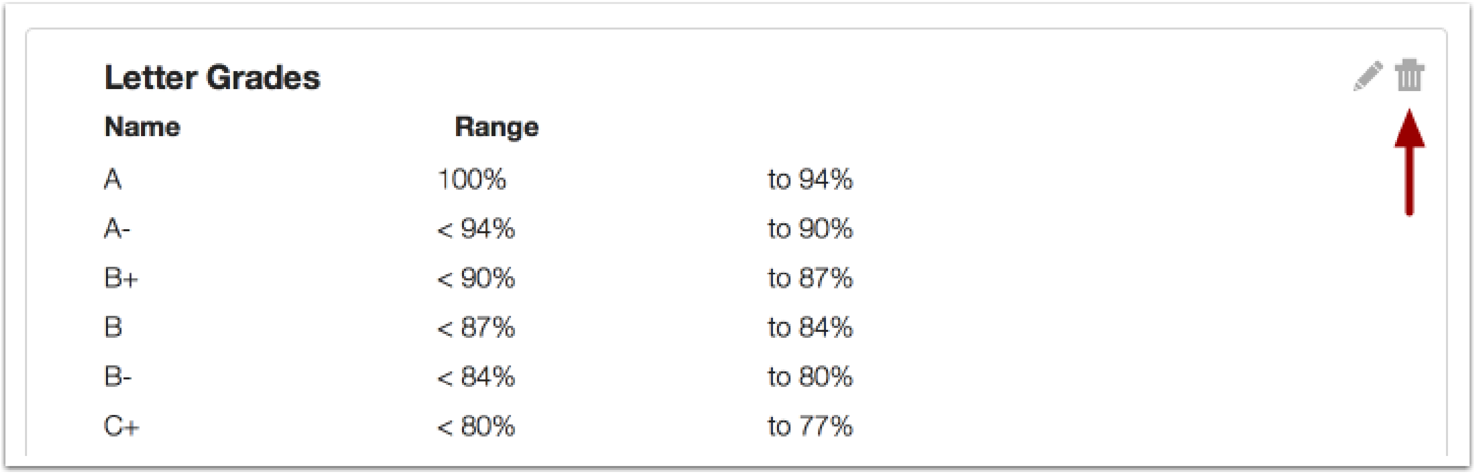
Open Grading Schemes



Click the **Grading Schemes** tab.

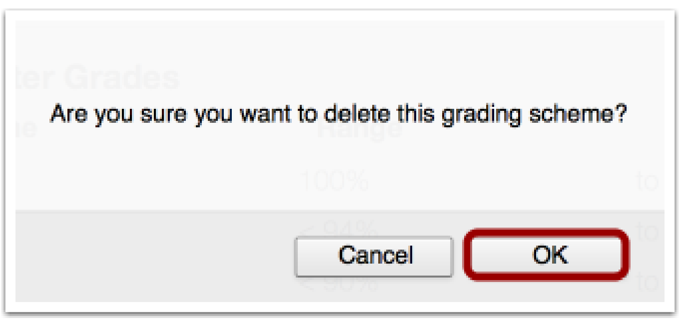
Note: You will see Grading Periods and Grading Schemes tabs if the [Multiple Grading Periods feature option] is enabled.

Delete Grading Scheme



Locate the grading scheme you want to delete and click the **Delete** icon.

Confirm Deletion



Click the **OK** button.

How do I manage grading periods for an account?

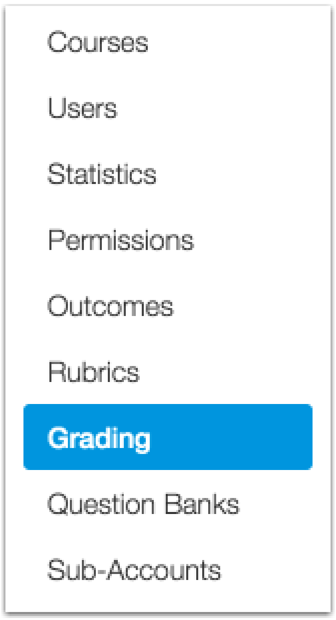
To create grading periods for an account, you must create a set of grading periods. A set of grading periods allows you to create a name for the grading period and associate a term. Each term can only be associated with one grading period set, but multiple terms can be in the same grading period set.

Terms should be added to a grading set if the courses in the term use the same grading periods. Courses associated with a term automatically inherit the grading periods created specifically for the term.

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.

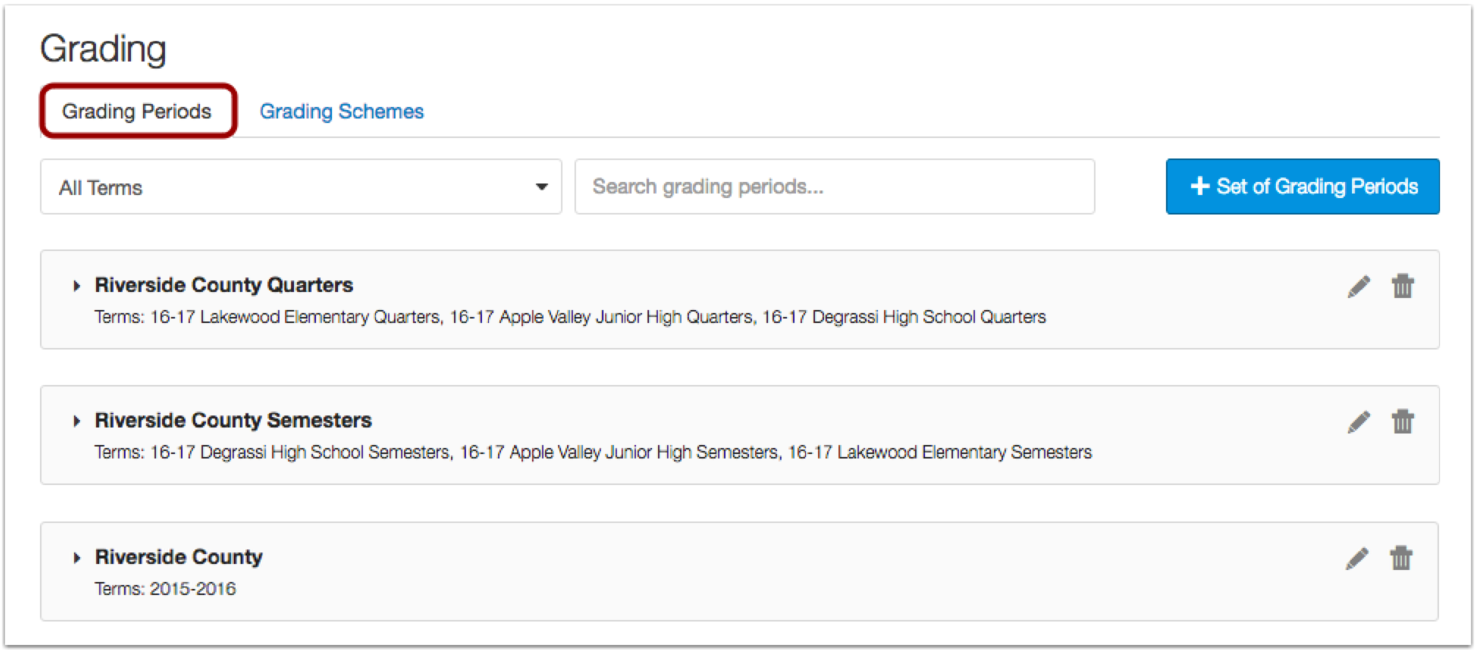
Note: Multiple Grading Periods is currently a course opt-in feature and enabled on a course-by-course basis for all paid accounts. To enable this feature, learn how to manage feature options in the account features lesson. (Grading periods are not available in Free-for-Teacher accounts.)

Open Grading



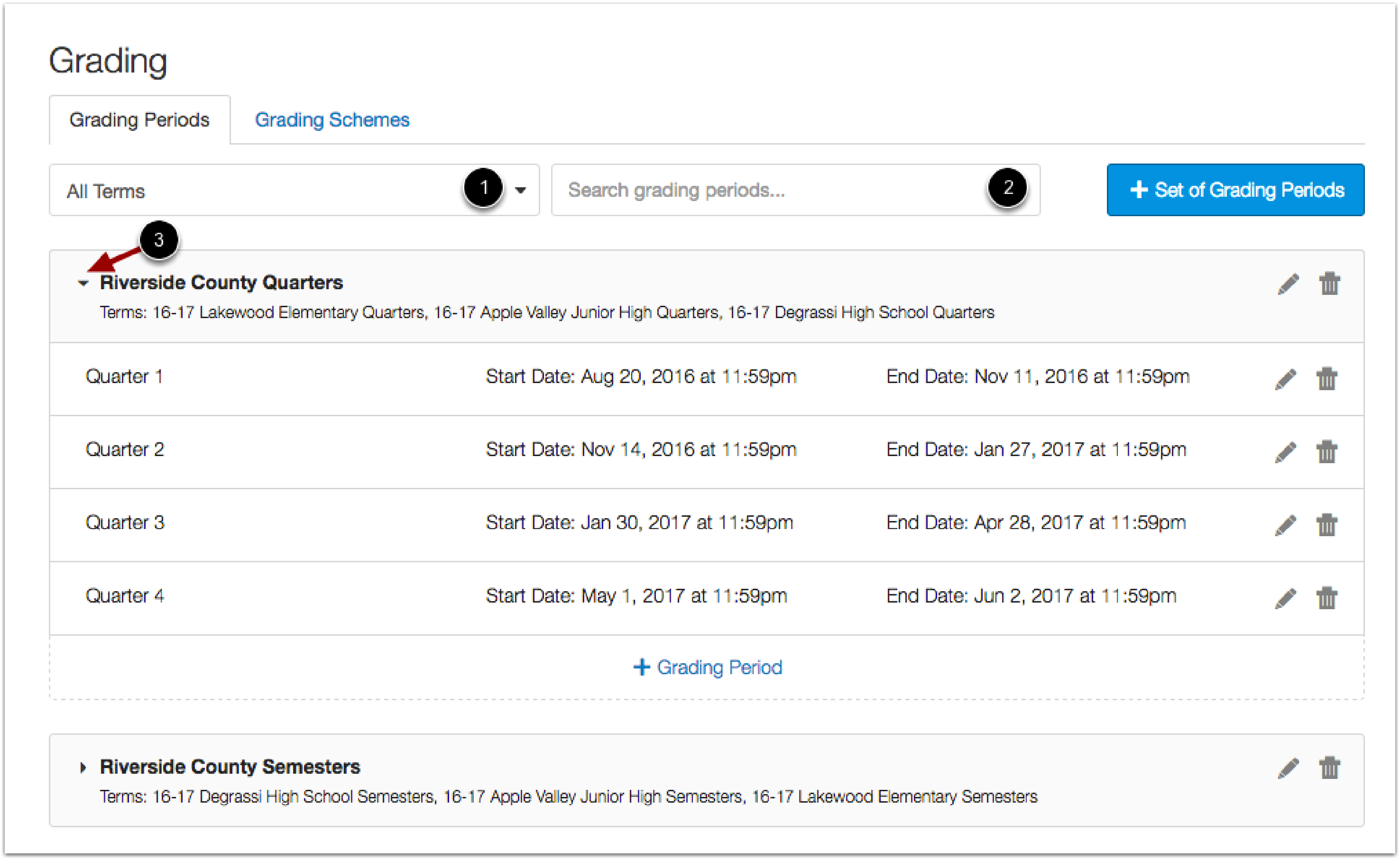
In Account Navigation, click the **Grading** link.

View Grading Periods



The Grading Periods account-level tab displays all grading period sets and their grading periods.

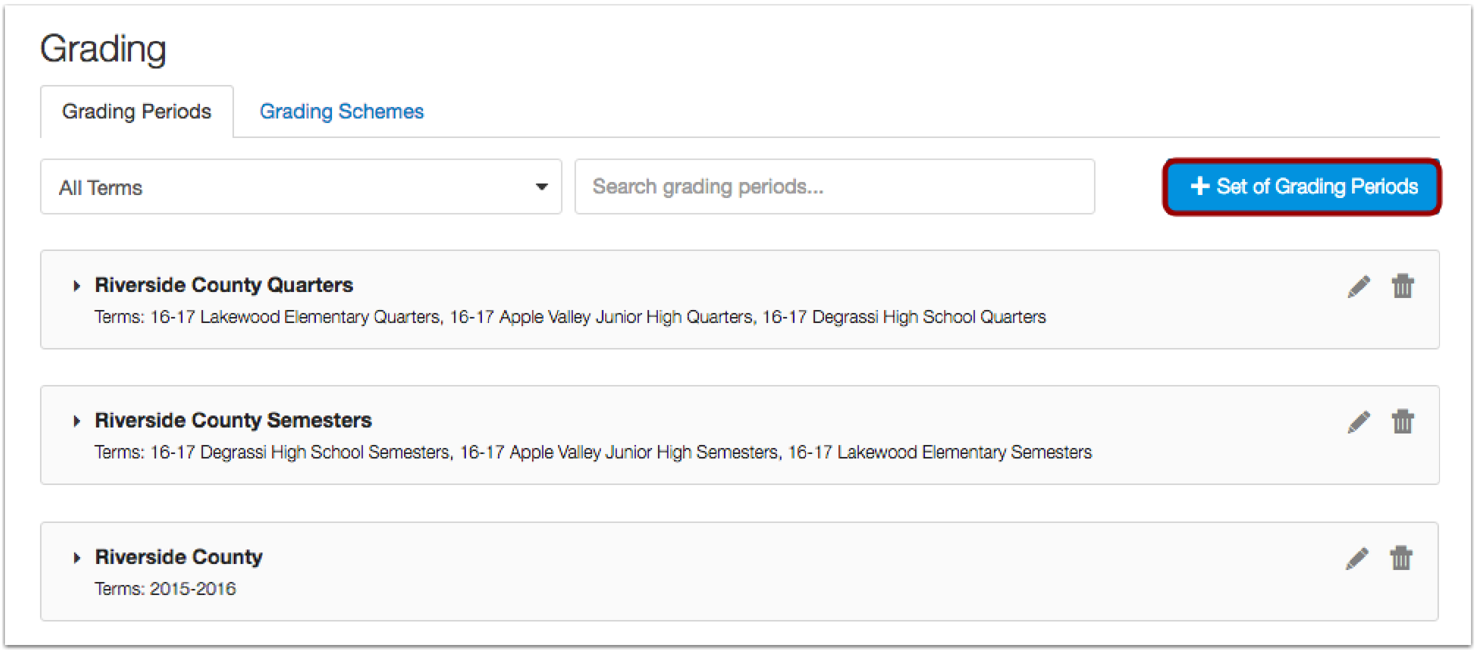
Filter Grading Period Sets



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].

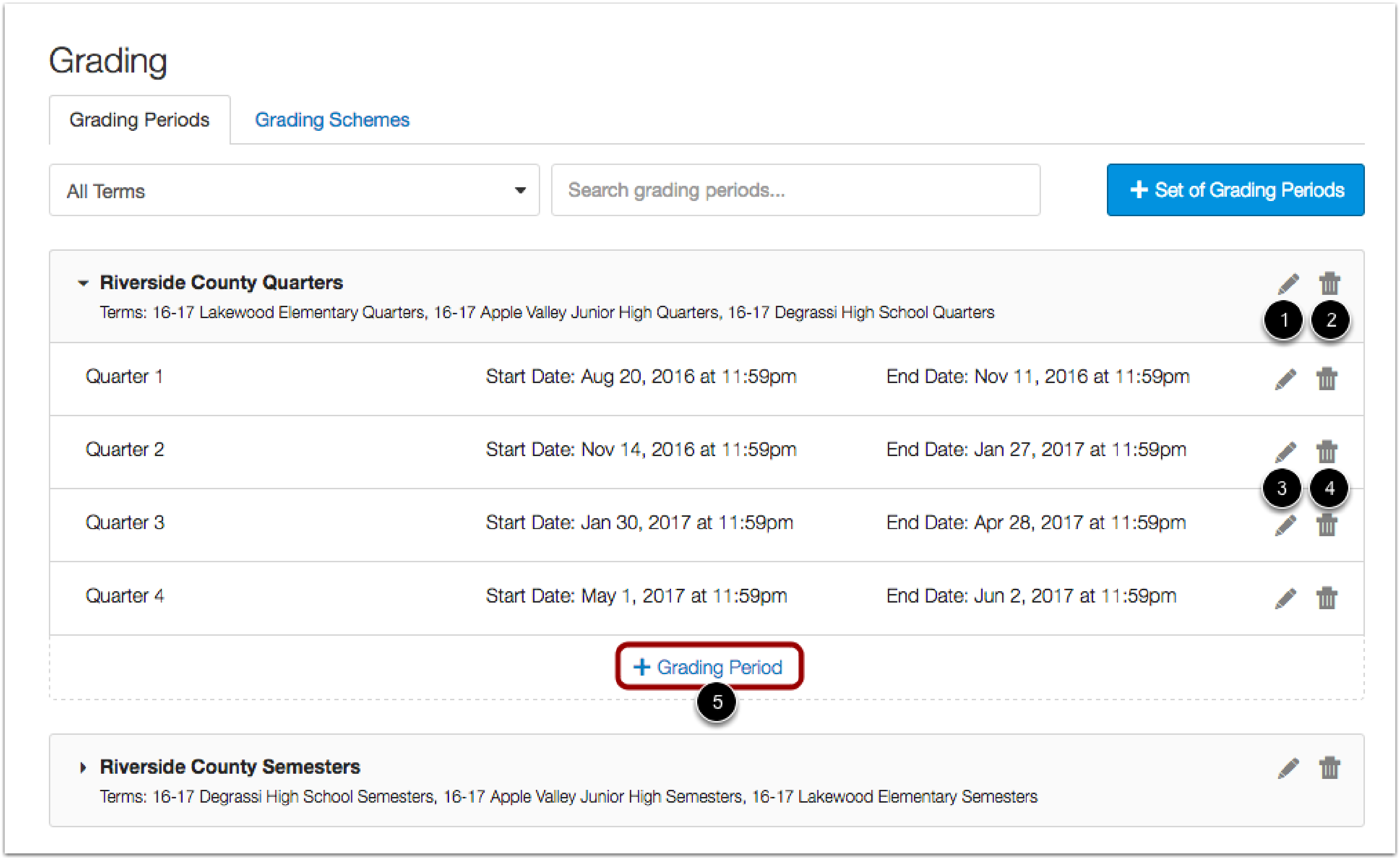
You can also expand a grading period set by clicking the arrow next to the set name [3].

Add Grading Period Set



To add a new grading period set, click the **Add Grading Period Set** button.

Manage Existing Grading Period Sets

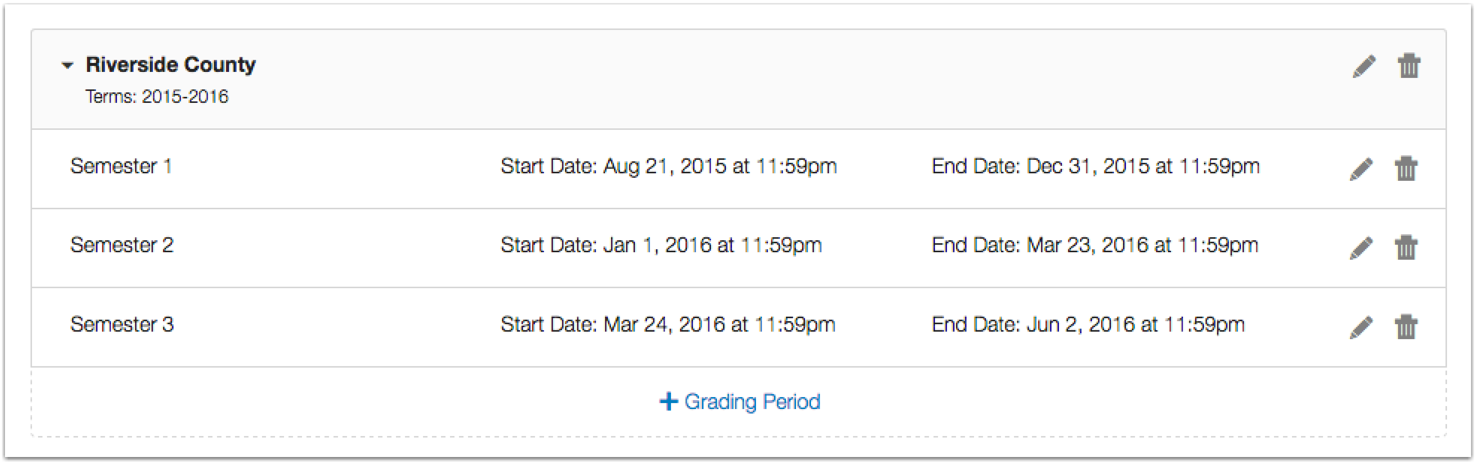


To edit the name or term(s) for a grading period set, click the **Edit** icon [1]. To delete the grading period set, click the **Delete** icon [2].

For a specific grading period, to edit the grading period dates, click the **Edit** icon [3]. To delete a grading period, click the **Delete** icon [4].

To add another grading period for a grading set, click the **Add Grading Period** link [5].

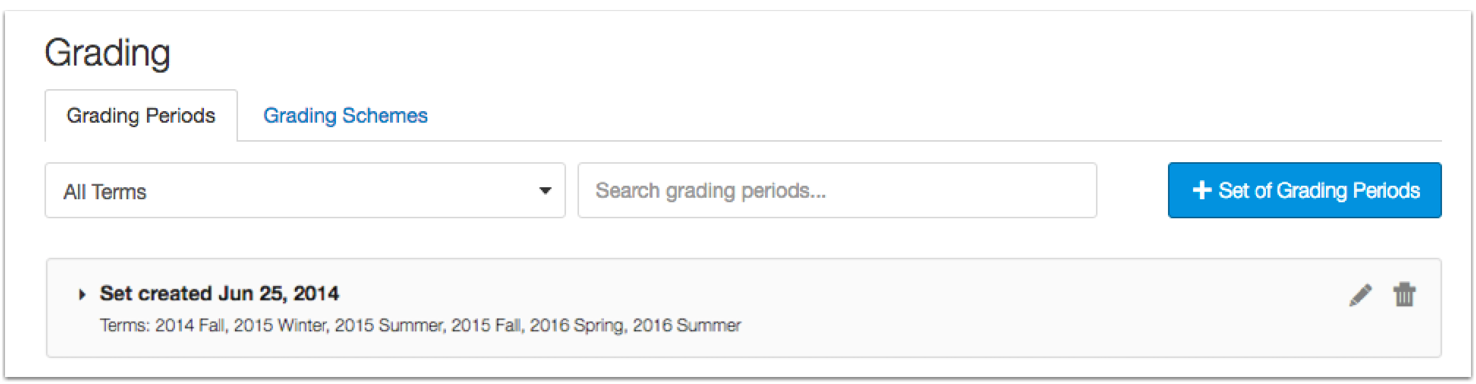
View Concluded Grading Periods



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.

View Current Grading Periods



As of July 16, 2016, any current account grading period—along with all prior grading periods—display as one grading period set. The name of the grading period set is the date a grading period was first created. You can edit the set and create a new name, or, if you would rather separate out the terms according to grading periods for reporting purposes, you may prefer to separate the terms into individual grading period sets (reflecting the grading periods for each term). Terms can be moved to another grading period set as long as it is removed from its existing set first.

How do I create grading periods in an account?

As part of managing grading periods, you can create new grading periods for courses within your institution. Grading periods can only be created at the account level. When grading periods are enabled in a course, the course displays grading periods associated with the course term.

Grading periods are created within a grading period set and associated with a term. 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. However, start and end dates cannot overlap in a grading period.

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.

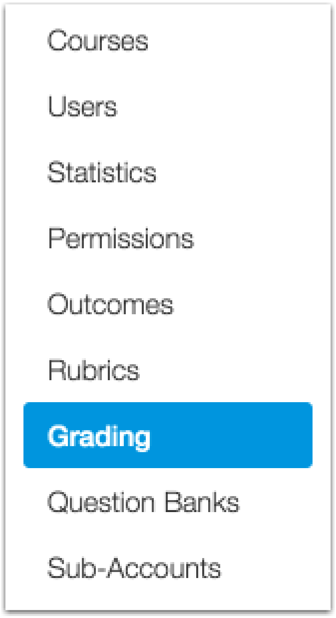
Multiple Terms and Grading Periods

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.

Notes:

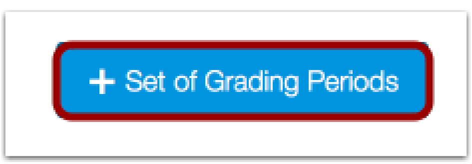
- Once a term is associated with a grading period, the name of the grading period displays with the term in the Terms page.
- Sub-accounts and courses display grading periods in a read-only state.
- Multiple Grading Periods is currently a course opt-in feature and enabled on a course-by-course basis for all paid accounts. To enable this feature, learn how to manage feature options in the account features lesson. (Grading periods are not available in Free-for-Teacher accounts.)

Open Grading



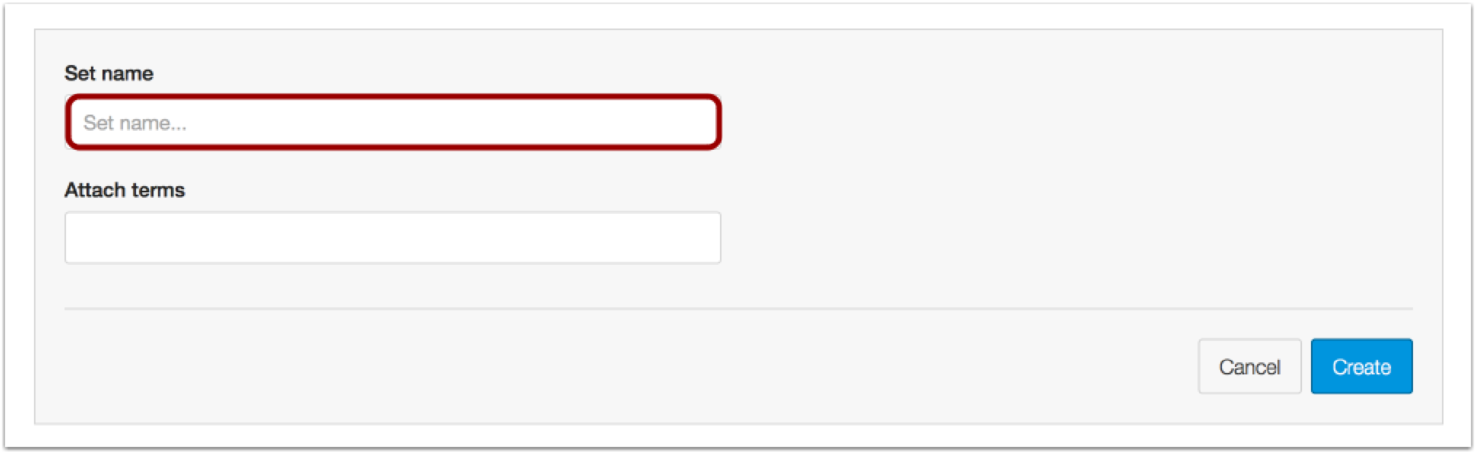
In Account Navigation, click the **Grading** link.

Add Set of Grading Periods



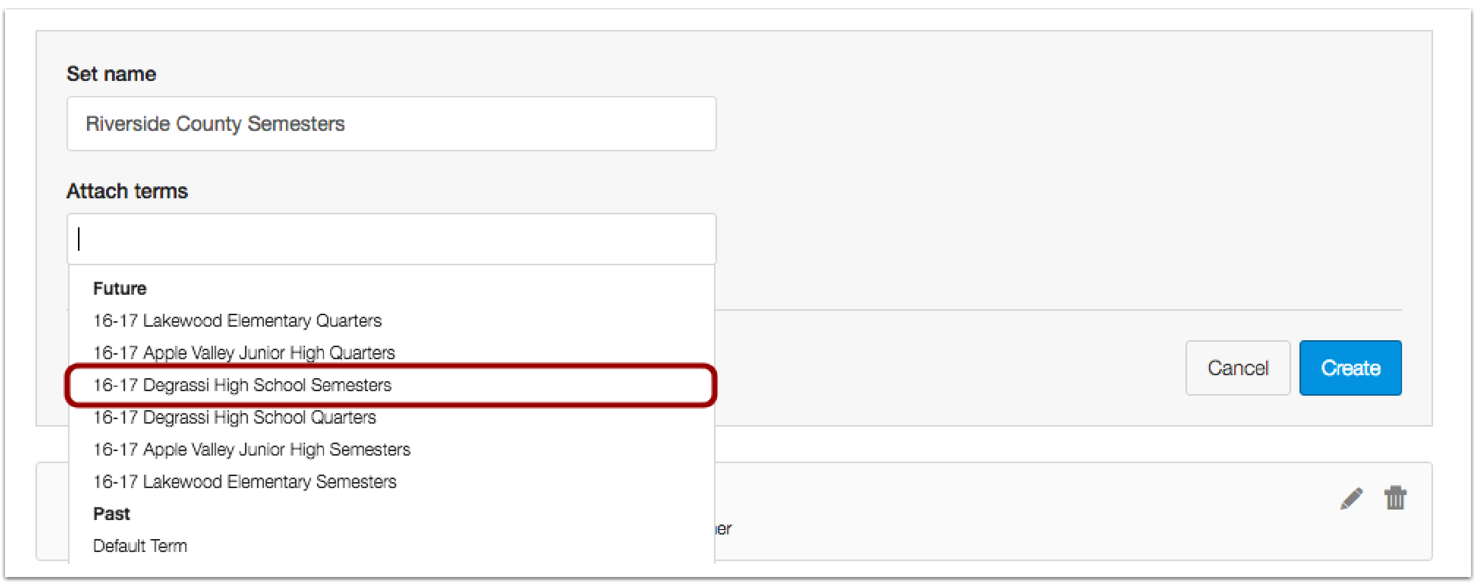
Click the **Add Set of Grading Periods** button.

Create Set Name



In the Set Name field, enter a name for the grading period set.

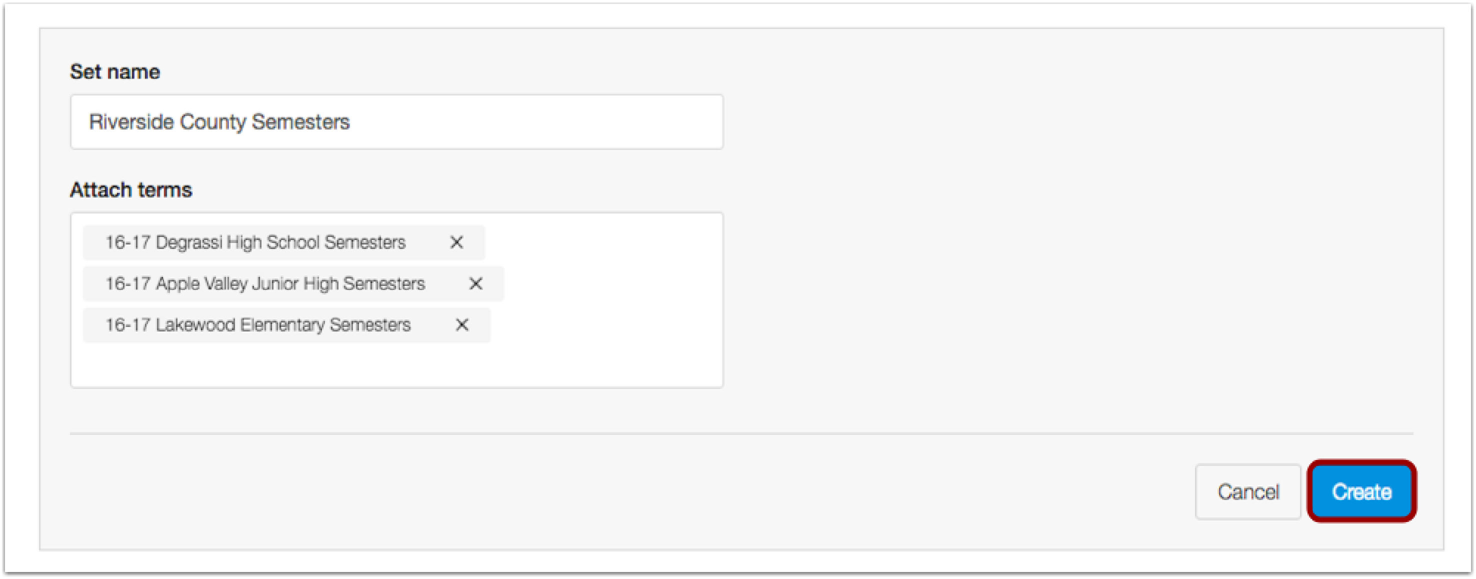
Attach Terms



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.

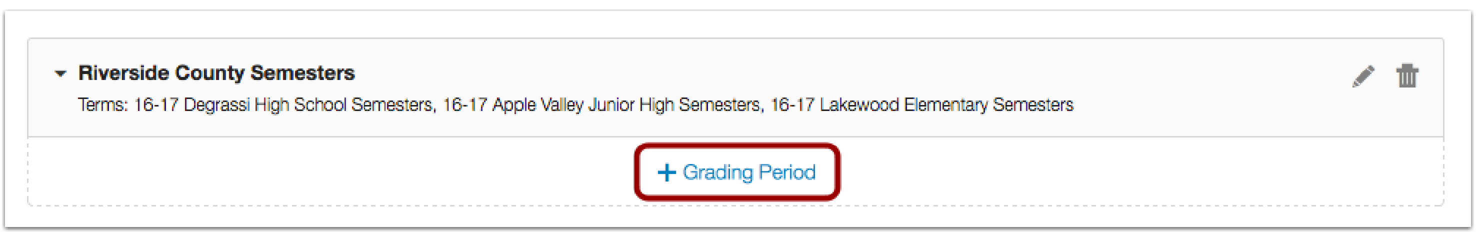
You can edit a grading period set and add a term at any time.

Create Set



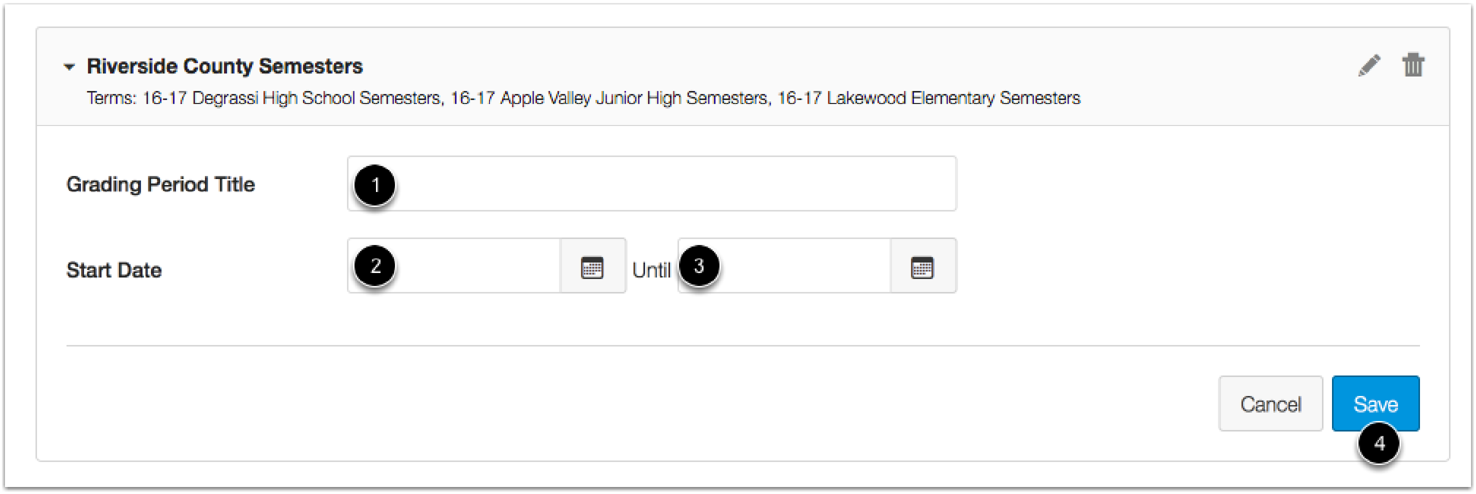
Click the **Create** button.

Add Grading Period



Click the **Add Grading Period** link.

Add Grading Period Details

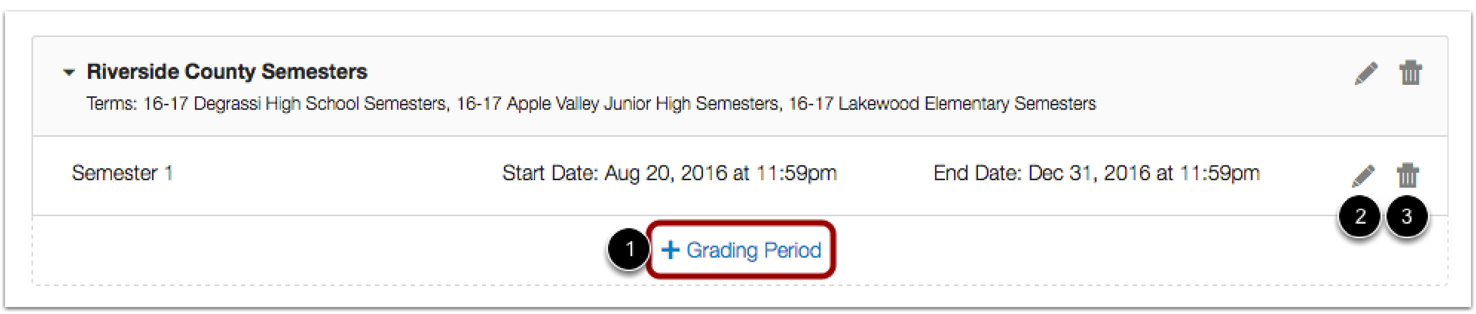


In the Grading Period Title field [1], create a title for the grading period. In the start date field [2], enter a start date for the period. You can also use the calendar icon to select a date. In the end date field [3], enter or select an end date.

If you do not include a time, the dates default to 12:00 am. Please note that an end date of 12:00 am means that the previous day is the last full day for the period. For instance, if a course ends on August 31 at 12:00 am, the last full day for the grading period is August 30.

Click the **Save** button [4].

Manage Grading Periods



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 or can be enabled with a Canvas account?

This article describes the standard, supported, and SIS integrations available within Canvas.

Standard Integrations

Canvas natively supports the following technological functionalities:

- User Messaging
- CAS, LDAP, and SAML Authentication
- RSS/Atom Feeds
- iCal
- E-Packs/Publisher Content
- IMS QTI
- Podcasts
- Basic LTI
- SCORM (Assignments only)
- Common Cartridge
- Document Previews
- Media Player
- Notifications

The following third-party providers provide standard integrations in several Canvas features:

- LaTex (Rich Content Editor)
- Crocodoc (SpeedGrader)
- Big Blue Button—basic hosting (Conferences)
- Google Docs (Collaborations)

Supported Integrations

Canvas provides optional integrations with a variety of third-party providers. The following integrations can be enabled at the account level, through LTI tools, or with the assistance of your Customer Success Manager (italics means the provider currently supports *partial integration*):

Web Services

- Twitter
- Delicious
- Skype
- Diigo
- SMS
- YouTube
- *LinkedIn*
- Google Docs/Previewer

Collaboration

- Diigo
- Adobe Connect
- Big Blue Button (premium hosting)
- Wimba

Educational

- Turnitin
- Wimba
- Equella
- *Respondus*
- Google Drive

Multimedia

- Kaltura
- Equella
- Flickr

Calendar Formats

- Outlook
- Google

Course Import Formats

- WebCT (Blackboard Vista)
- Blackboard
- Angel
- Moodle 1.9/2.x
- D2L

Course Cartridges

- McGraw-Hill course cartridges
- Cengage

SIS Integrations

There are multiple Student Information Systems that have been successfully integrated with Canvas. To view the list of SIS integrations, visit Does Canas integrate with my Student Information System (SIS)?

Nearly any SIS can be integrated with Canvas as long as (1) the Data exported from it can be formatted according to the information using the SIS Imports API or the SIS CSV file and (2) the data is submitted to Canvas through the SIS Imports API or manually in the Admin interface.

Note: For more information regarding SIS integrations, please visit the Canvas Community Admin Group or contact your Customer Success Manager.

Does Canvas integrate with my student information system (SIS)?

Canvas has built-in support for a number of different SIS systems. Canvas can also support integrating 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. Learn how to configure SIS submissions.

For more information about SIS integrations, visit the Canvas Community Admin Group.

Canvas Managed

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 (in development)*
- PowerSchool (also requires the Post to SIS account-level feature option)
- Skyward

**Instructor documentation is currently not available for this integration.*

Partner Managed

Partner 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 (in development by vendor)
- Sungard eSchoolPlus (in development by vendor)

- Kimono

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.

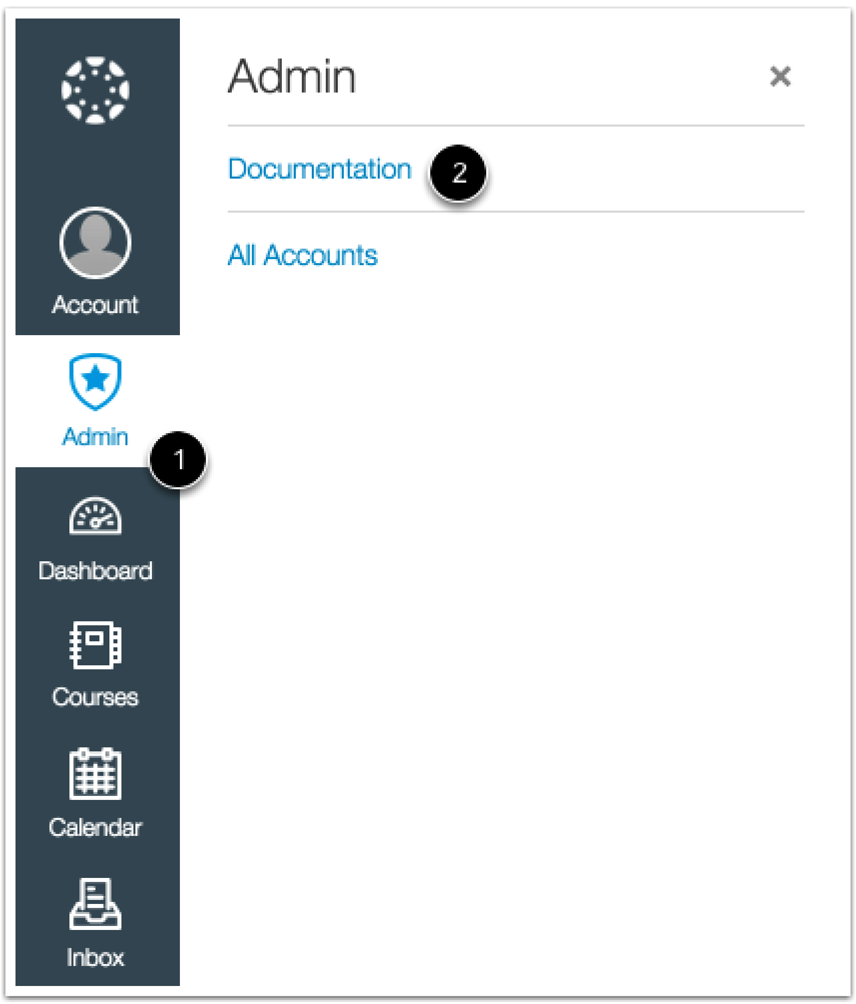
How do I configure student information system (SIS) submissions for an account?

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.

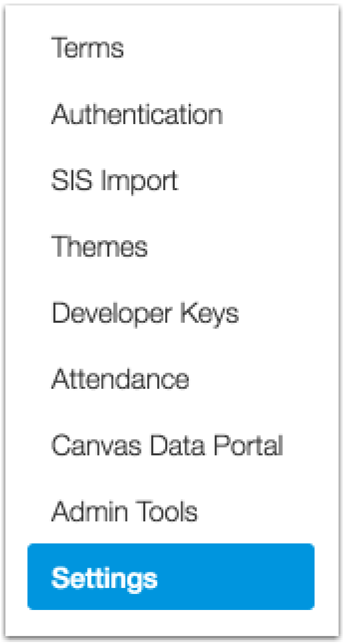
Note: Student information systems must be configured by your Customer Success Manager. You cannot configure your SIS submissions unless a specific feature option is enabled for your account. Learn more about feature options in the account features lesson.

Open Account



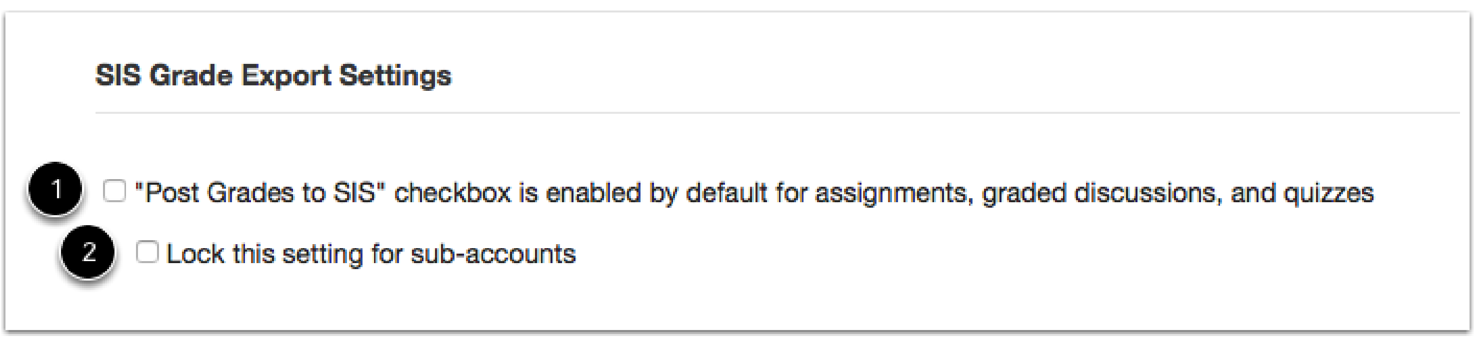
Click the **Admin** link [1], then click the name of the account [2].

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 the SIS Grade Export Settings section is not available, your Customer Success Manager (CSM) has not enabled an SIS for your institution. Please contact your CSM for assistance.

Update Settings

Click the **Update Settings** button.

How do I enable Turnitin for an account?

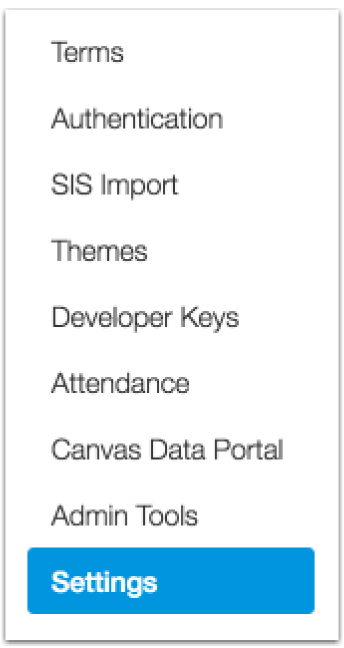
Turnitin is the leading academic plagiarism detector, utilized by teachers and students to avoid plagiarism and ensure academic integrity.

Canvas uses a Turnitin LTI for assignment submissions. The LTI supports OriginalityCheck, GradeMark, and PeerMark so all features can pass information directly back to Turnitin. Canvas uses student and instructor roles for authentication (based on email address) to access Turnitin. Students can also upload assignment submissions and view originality reports directly in Canvas.

To integrate Turnitin with your Canvas account, you will need to create a shared secret by logging in to your Turnitin Account and viewing the Canvas integrations page. You must have a Turnitin account before you can use the Turnitin LTI.

As part of the LTI integration, you can set custom fields in the External App configuration to automatically pass back Canvas assignment details to Turnitin.

Open Settings

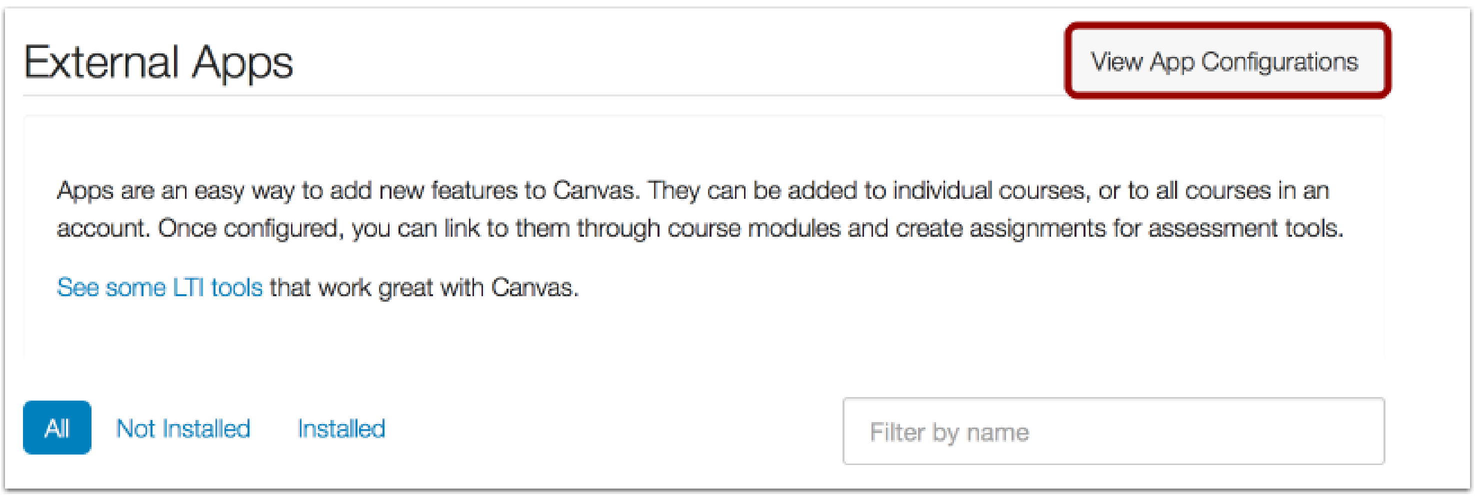


In Account Navigation, click the **Settings** link.

Open Apps

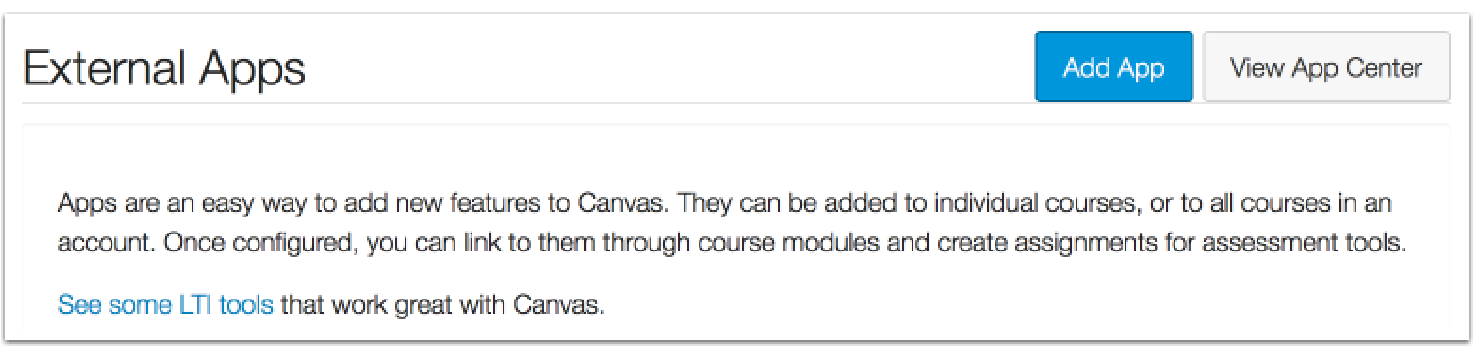
Click the **Apps** tab.

View App Configurations



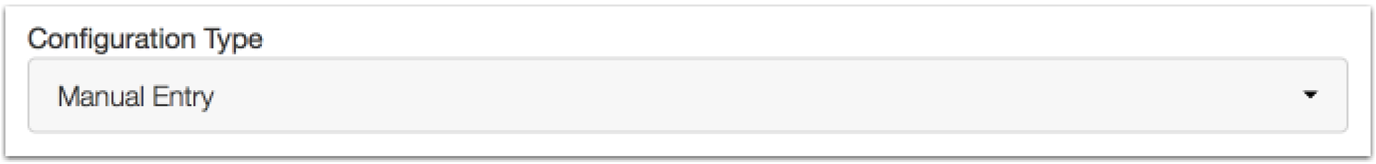
To configure an app, click the **View App Configurations** button.

Add App



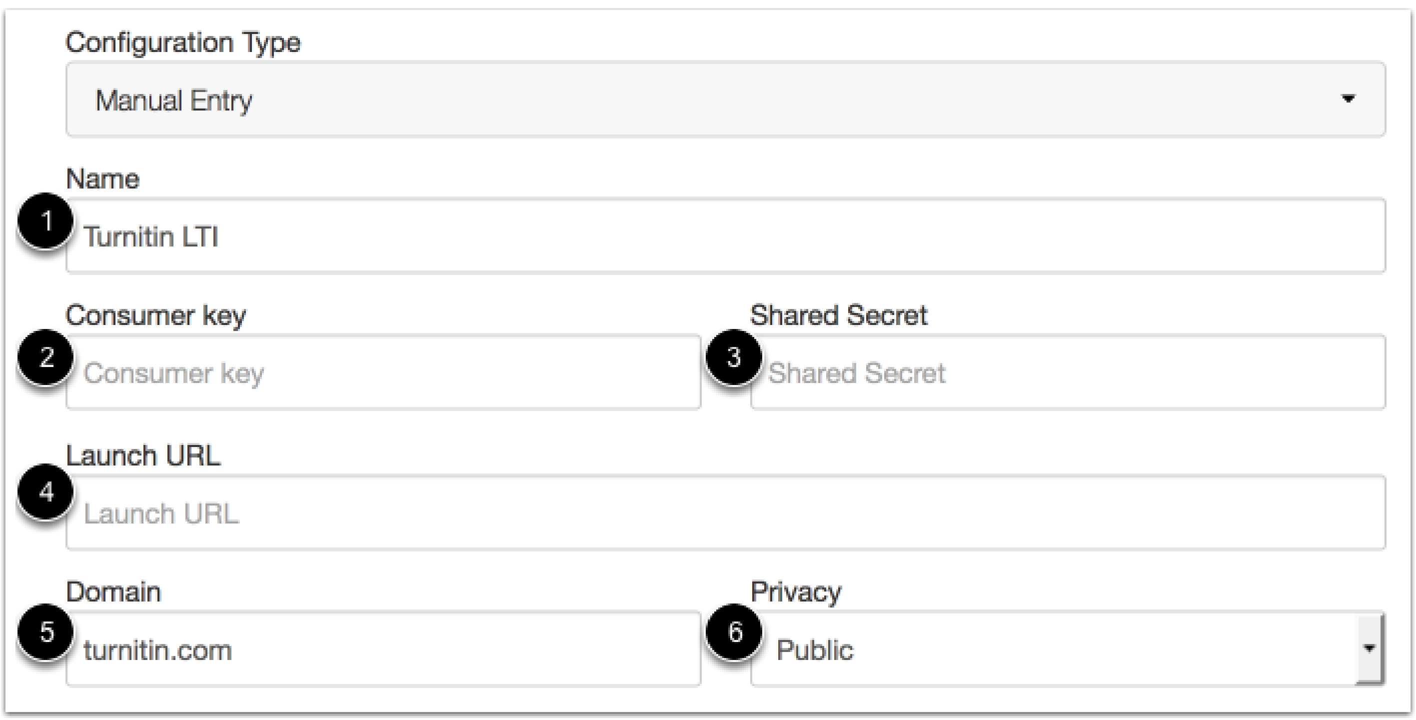
Click the **Add App** button.

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 [1], enter a name for the Turnitin LTI (e.g. Turnitin). Create a name that instructors can recognize to add as an external tool to their assignments.

In the **Consumer Key** field [2], enter your Turnitin Account ID. In the **Shared Secret** field [3], enter the secret as created in your Turnitin Account Settings.

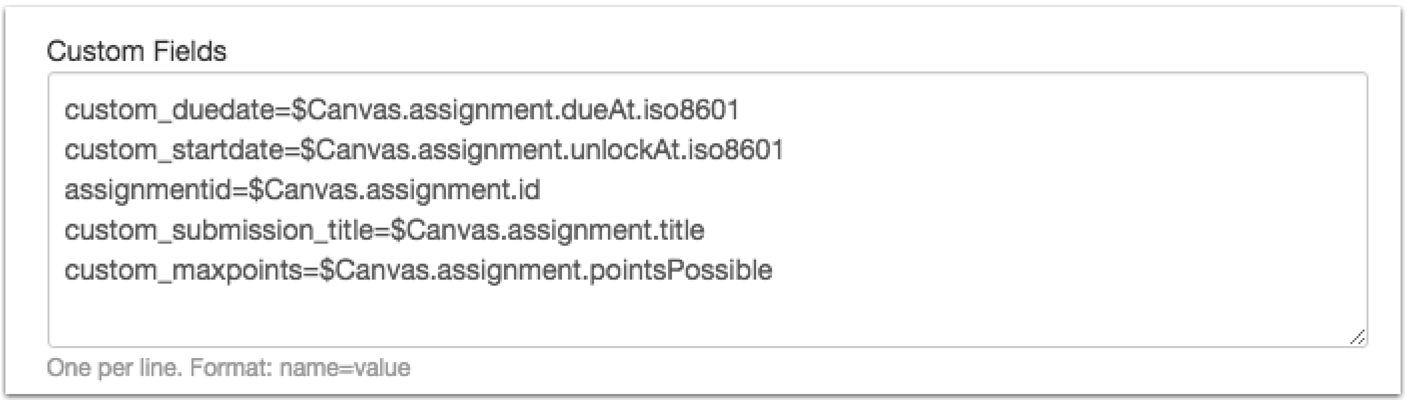
In the **Launch URL** field [4], use the appropriate launch URL for your location:

- https://submit.ac.uk/api/lti/1p0/assignment (United Kingdom users)
- https://api.turnitin.com/api/lti/1p0/assignment (all other users)

In the **Domain** field [5], enter turnitin.com.

In the **Privacy** drop-down menu [6], select the Public option. This setting allows Canvas to share student names and emails with Turnitin.

Add Custom Fields

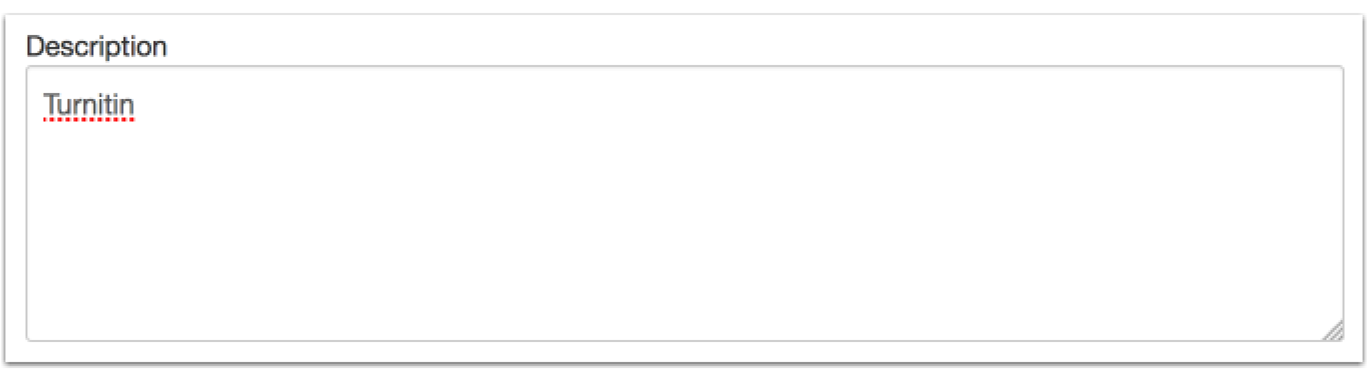


Custom fields can be left blank. However, Canvas engineers have developed substitution variables that sync information between Canvas and Turnitin. Currently supported variables include:

- custom_duedate=$Canvas.assignment.dueAt.iso8601
- custom_startdate=$Canvas.assignment.unlockAt.iso8601
- assignmentid=$Canvas.assignment.id
- custom_submission_title=$Canvas.assignment.title
- custom_maxpoints=$Canvas.assignment.pointsPossible

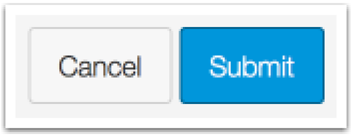
The variables represent assignment due date, available from date, assignment ID, assignment title, and assignment point value, respectively.

Add Description



In the **Description** field, create a description for the LTI. This description appears in the External Tools list for instructors.

Submit App



Click the **Submit** button.

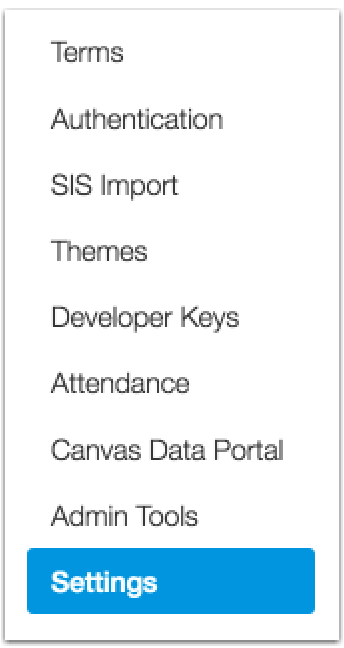
How do I enable Equella for an account?

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.

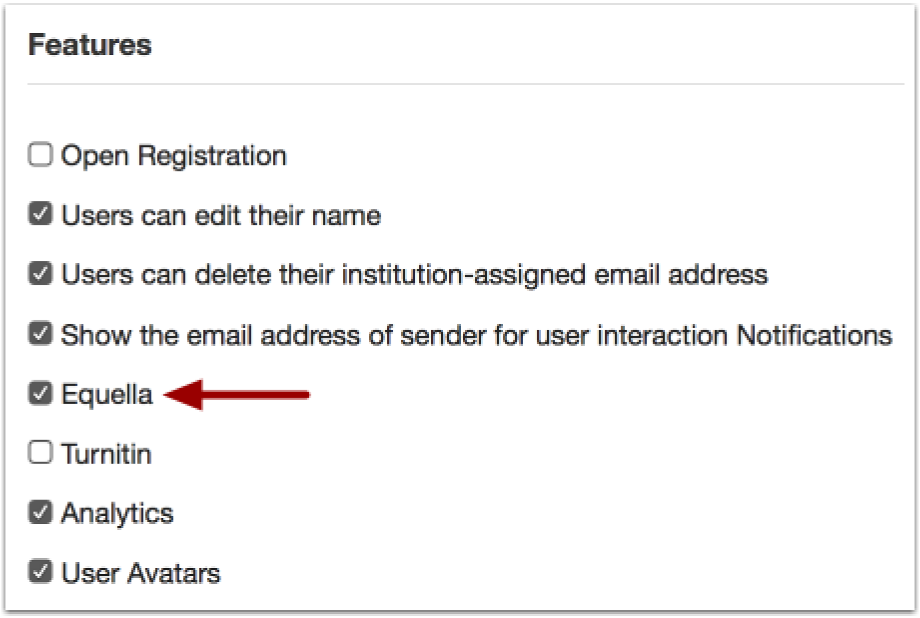
Note: You must have an Equella account before you can enable Equella in Canvas.

Open Settings



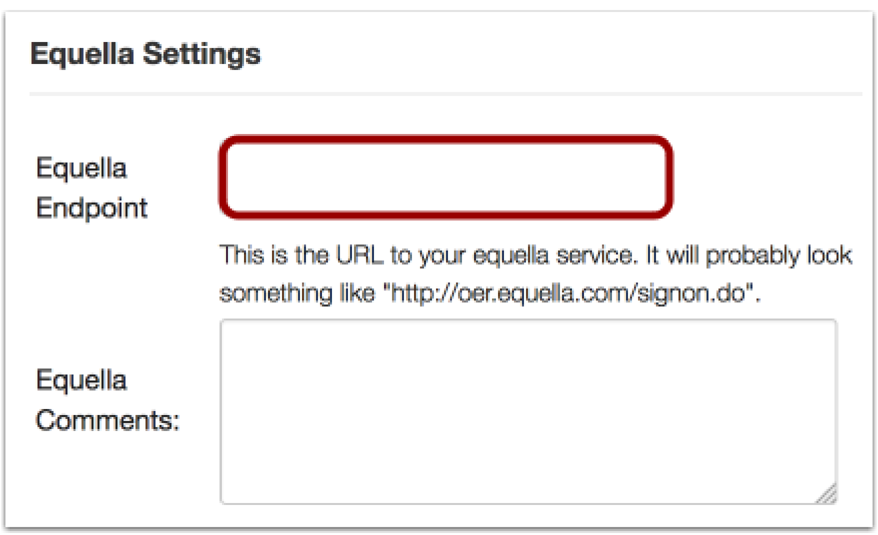
In Account Navigation, click the **Settings** link.

Enable Equella



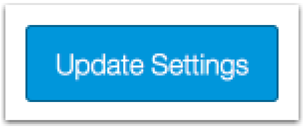
On the account settings page, under the features section, select the **Equella** checkbox.

Enter Equella Settings



In the Equella Settings section that appears, enter your Equella Endpoint URL.

Update Settings



Click the **Update Settings** button.

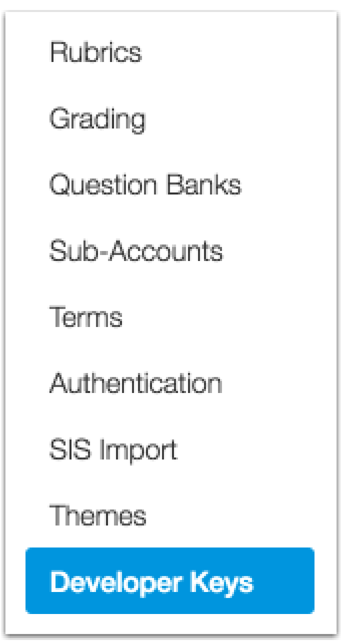
How do I manage developer keys for an account?

As an admin, you can manage developer keys for root accounts.

If your account has existing keys, they will not appear on this page until a future release. Contact your Customer Success Manager if you need assistance with existing keys.

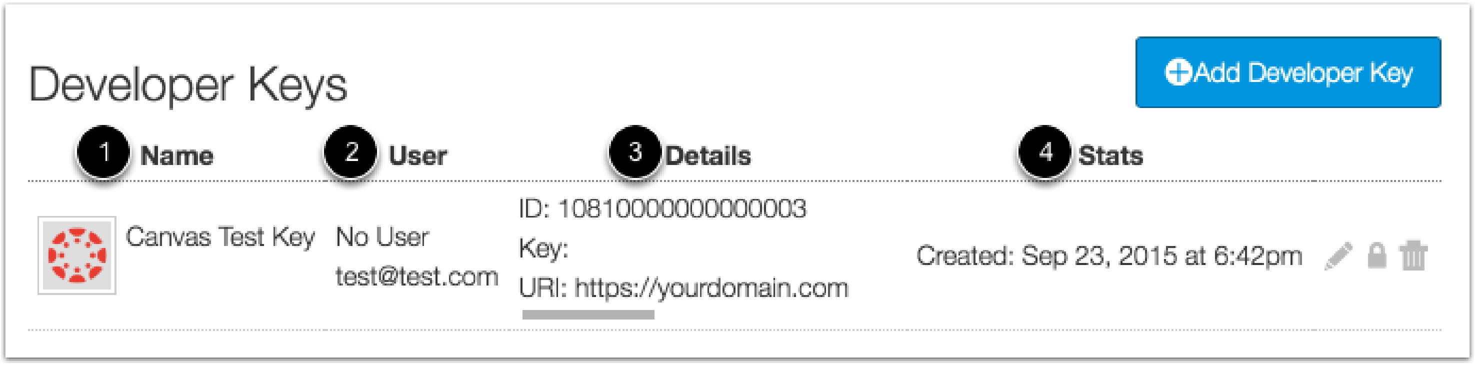
Note: Developer Keys is an account permission. If you cannot view the Developer Keys link in Account Navigation, this permission has not been enabled for your user account.

Open Developer Keys



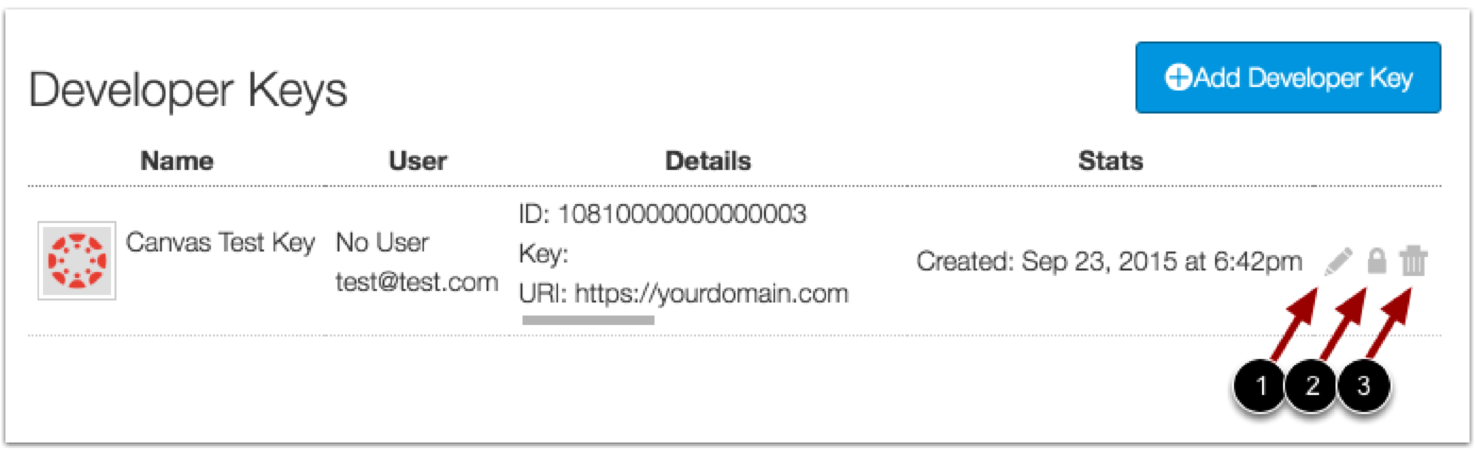
In Account Navigation, click the **Developer Keys** link.

View Developer Keys



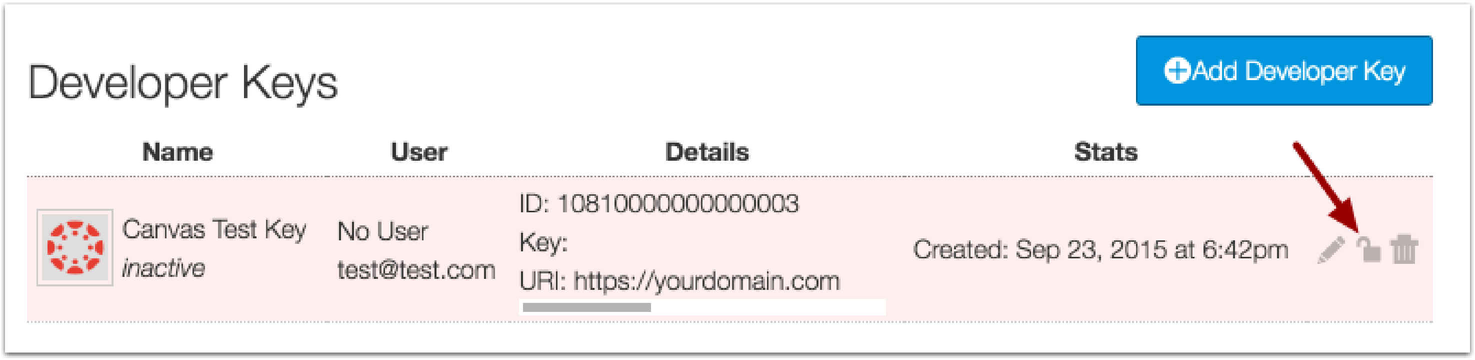
View the Developer Keys for your account. Each key shows the Key Name [1], User [2], Details [3], and Status [4].

Manage Developer Keys



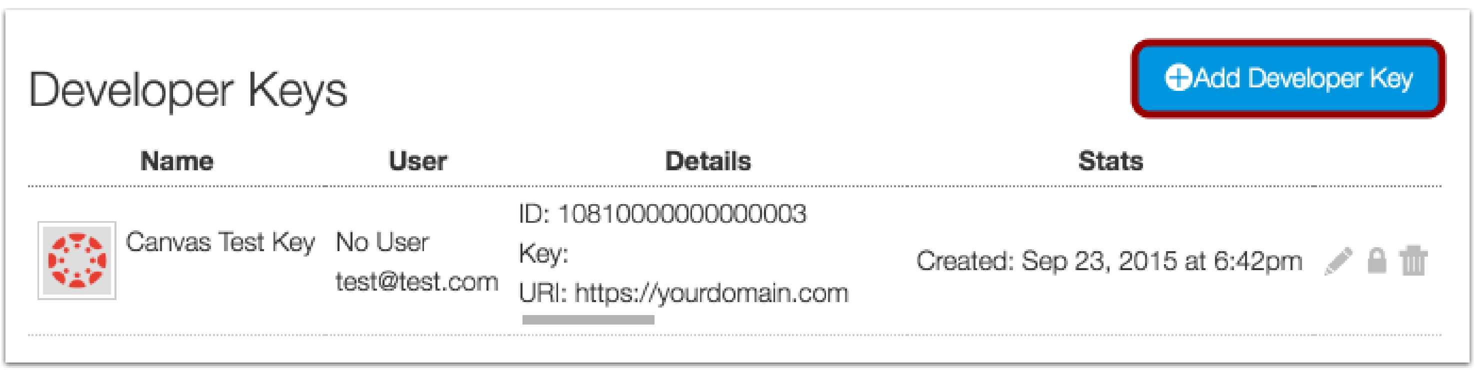
To edit a key, click the **Edit** icon [1]. To deactivate a key, click the **Lock** icon [3]. To delete the key, click the **Delete** icon [3]. Editing a key also allows you to create a legacy redirect URI if necessary.

View Deactivated Keys



When a key is deactivated, the key is inactive. Deactivated keys are shown with a red background. To reactivate an inactive key, click the **Unlock** icon.

Add Developer Key



To add a developer key, click the **Add Developer Key** button.

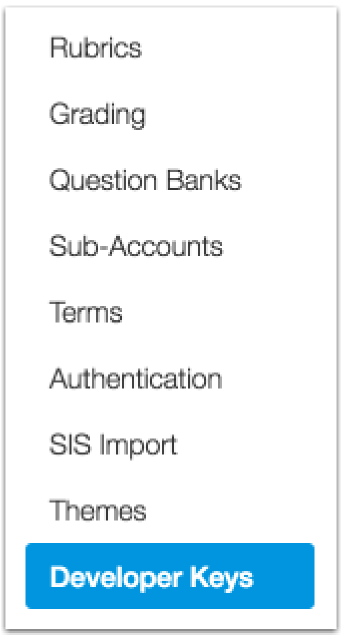
How do I add a developer key for an account?

As an admin, you can create developer keys for root accounts. A developer key uses Oauth2 to ask a user for permission to programmatically create an API access token. For more information about Oauth2, see the Instructure API OAuth documentation.

Developer keys can be used to create custom integrations with Canvas. For more information about developer documents, see the Instructure Github page.

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 Developer Keys

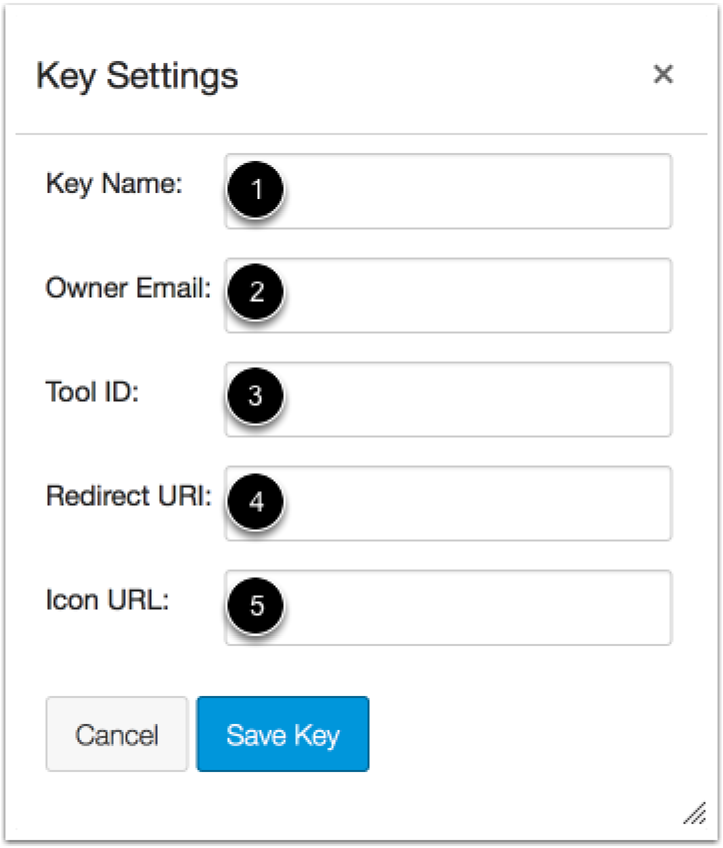


In Account Navigation, click the **Developer Keys** link.

Add Developer Key

Click the **Add Developer Key** button.

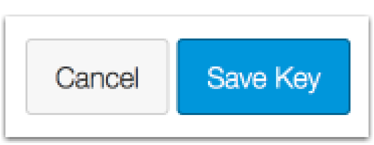
Enter Key Settings



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.
- **Tool ID** [3]: The ID of the developer tool (optional). This field can be left blank, or you can create your own numerical ID.
- **Redirect URI** [4]: The domain where tokens are requested. This URI is not your Canvas URL. To avoid mixed content browser concerns, use https.
- **Icon URL** [5]: 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.

Save Key



Click the **Save Key** button.

View Key

View the Developer Key for your account.

Languages

What languages does Canvas support?

Language preferences can be set by the user, by the instructor in a specific course, or by the admin for the entire account. However, depending on the Canvas area, some language preferences can be overridden.

If no language is set, Canvas defaults to English (United States).

Canvas supports the following languages:

- English—United States
- Danish
- German
- English—Australia
- English—United Kingdom
- Spanish
- French
- Dutch
- Norwegian—Bokmål
- Norwegian—Nynorsk (crowd-sourced)
- Polish
- Portuguese
- Portuguese—Brazil
- Maori
- Swedish
- Turkish (crowd-sourced)
- Russian
- Armenian (crowd-sourced)
- Hebrew (crowd-sourced)
- Arabic
- Persian (crowd-sourced)
- Japanese
- Chinese—simplified
- Chinese—traditional
- Korean (crowd-sourced)

Developing Languages

19 Project languages

Arabic 98%	125 strings to translate
Chinese 98%	125 strings to translate
Chinese (Hong Kong) 98%	124 strings to translate
Danish 98%	124 strings to translate
Dutch 98%	124 strings to translate
English (Australia) 98%	125 strings to translate
English (United Kingdom) 98%	126 strings to translate
French 98%	124 strings to translate

Display all languages

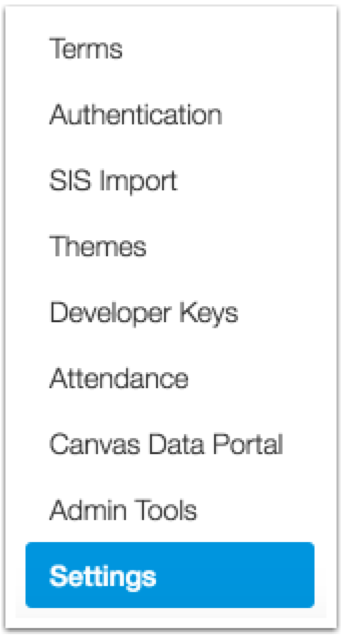
To help support additional languages more quickly, Canvas built the **Canvas Translation Community**. This is a community of developers who volunteer to help update language code for Canvas. The Canvas Translation Community shows all the current languages in development and how close they are to being completed. If you or someone you know would like to help with language translation, visit the Canvas Translation Community page for more information.

How do I change the language preference in an account?

If you are an international institution, you can change the default language for your entire account. This change will override any browser/OS language settings.

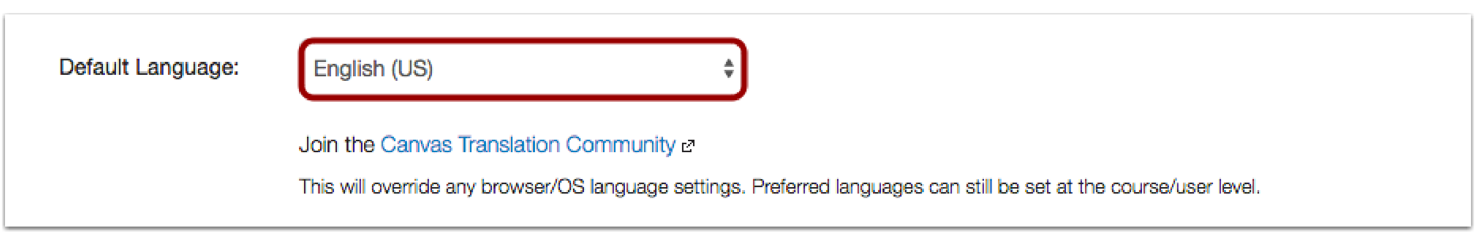
Note: Users can select a preferred language in their user settings, which will override the account default.

Open Settings



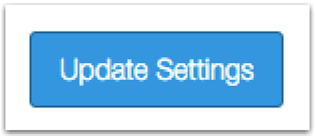
In Account Navigation, click the **Settings** link.

Select Language



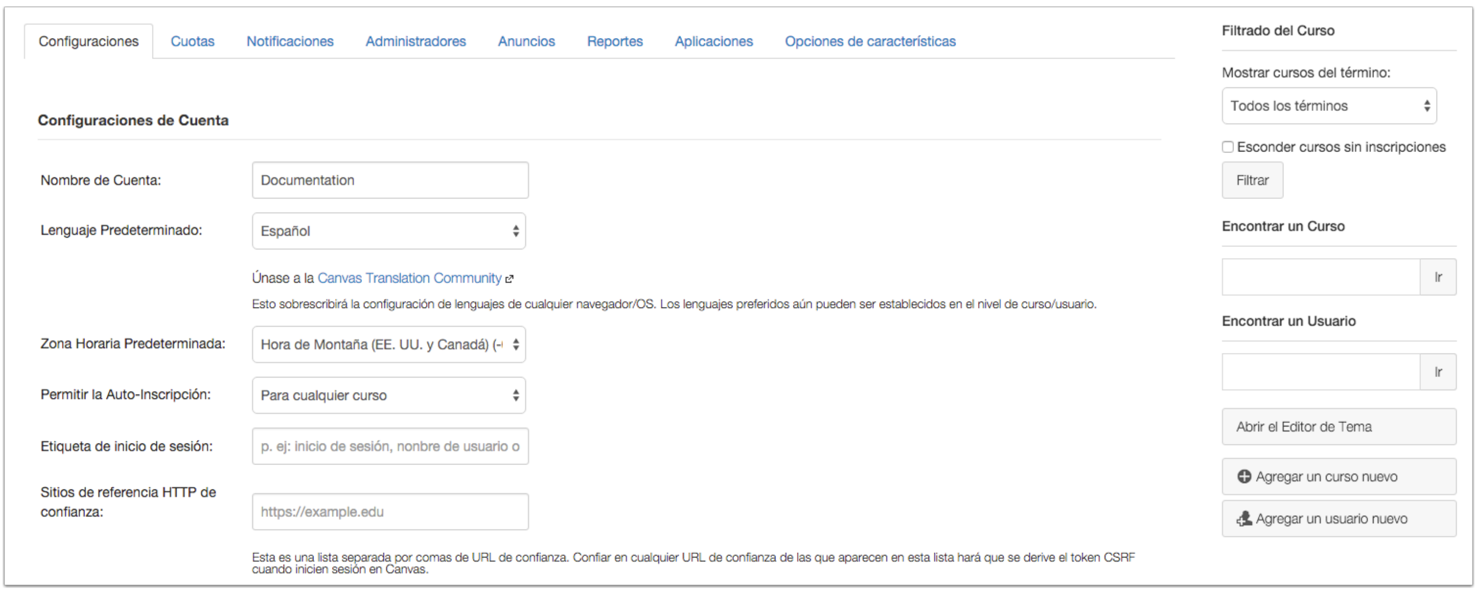
In the Settings tab, click the **Default Language** drop-down menu. Select the new default language.

Update Settings



Click the **Update Settings** button.

View in Default Language



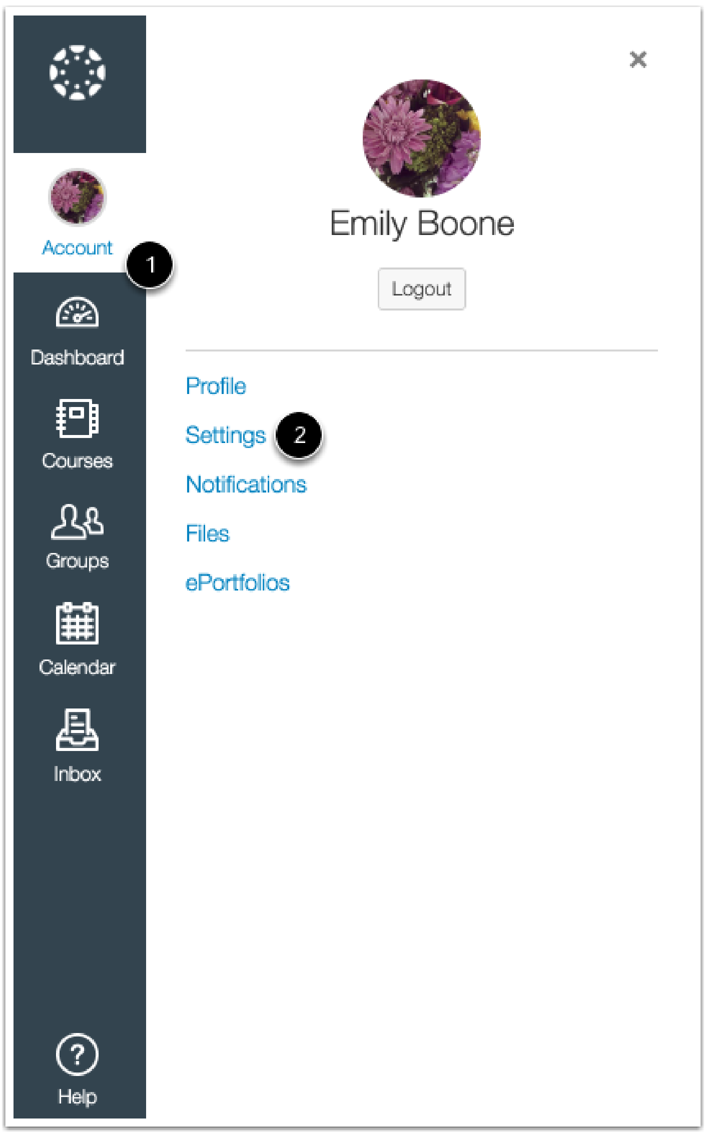
View Canvas in the new default language for your account.

How do I change the language preference in my user account?

English is Canvas' language default, but you can choose to view the Canvas interface in another language.

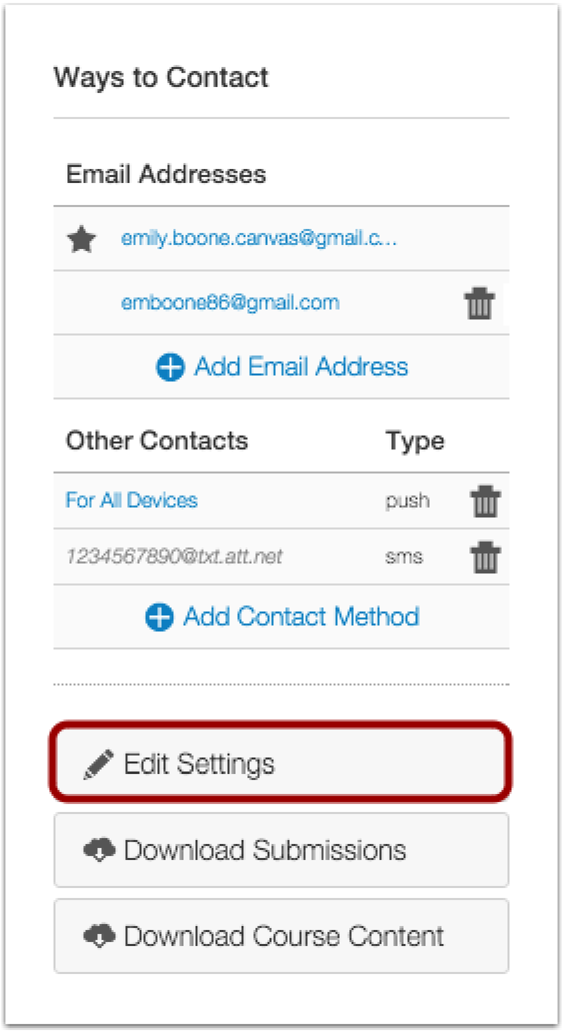
Note: Instructors have the option to change the language preference for their courses. If you enroll in a course where the instructor has made this change (most often for a foreign language course), the course language will override the language in your user settings.

Open User Settings



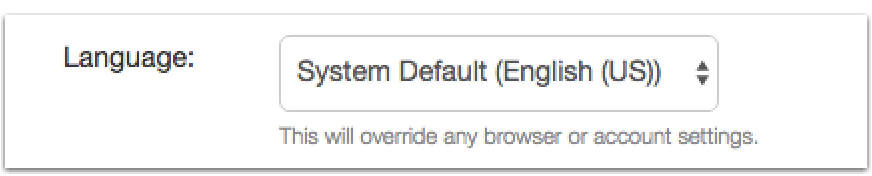
In Global Navigation, click the **Account** link [1], then click the **Settings** link [2].

Edit Settings



Click the **Edit Settings** button.

Select Language

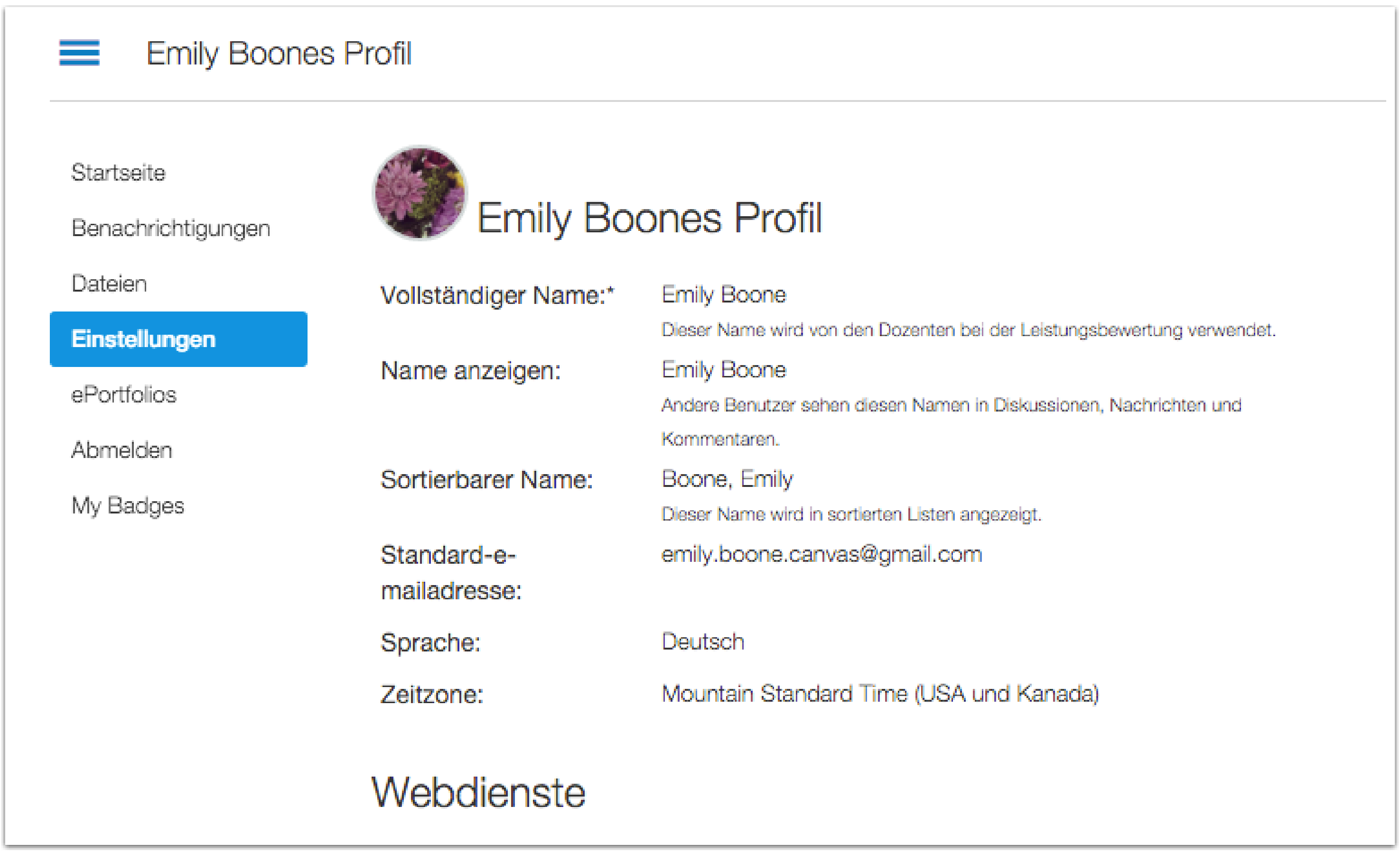


In the Language drop-down menu, choose your preferred language.

Update Settings

Click the **Update Settings** button.

View Preferred Language



View Canvas in your preferred language.

Outcomes

What calculation methods are available for outcomes?

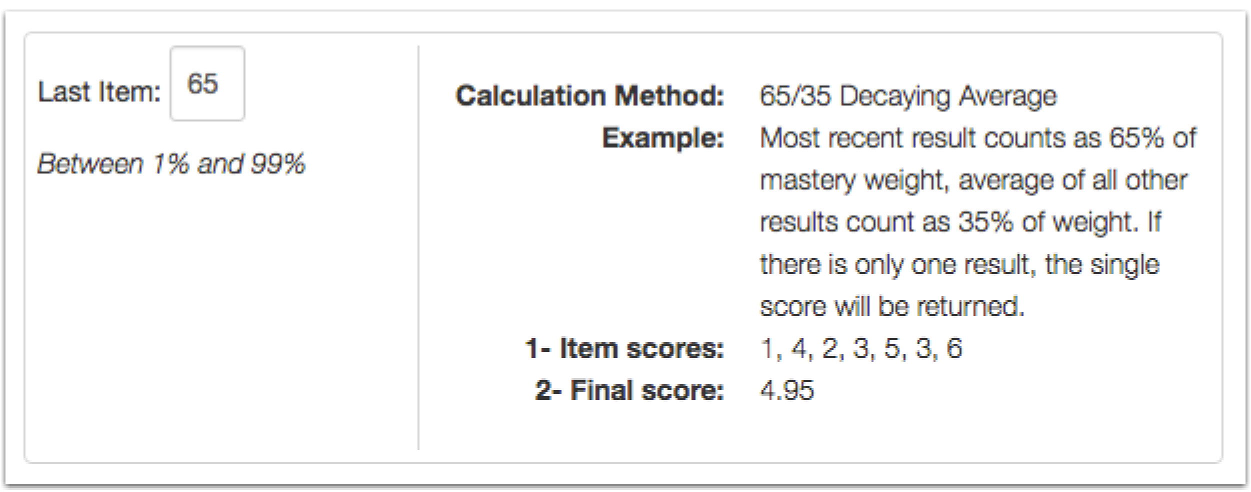
When creating an outcome, you can specify one of four calculation methods used for student mastery: Decaying Average, n Number of Times, Most Recent Score, and Highest Score. Calculation methods are used in conjunction within the Learning Mastery Gradebook.

You can set calculation methods when creating custom course outcomes (instructors) or creating custom account outcomes (admins).

Notes:

- For new Outcomes created in the Canvas interface, the default calculation is Decaying Average unless changed to another calculation.
- For new Outcomes created using the Outcomes API, the default calculation is set as Highest Score but can be modified with the appropriate parameters.
- If you import an outcome that you don't have permission to modify, you cannot change the calculation method.
- Common Core outcomes are always calculated as Highest Score; however, the calculation method can be modified using the Outcomes API by any user with appropriate admin permissions.

Set Decaying Average



The **Decaying Average** calculation factors the average of all assessment items while weighing the most recent (current) item at a higher percentage.

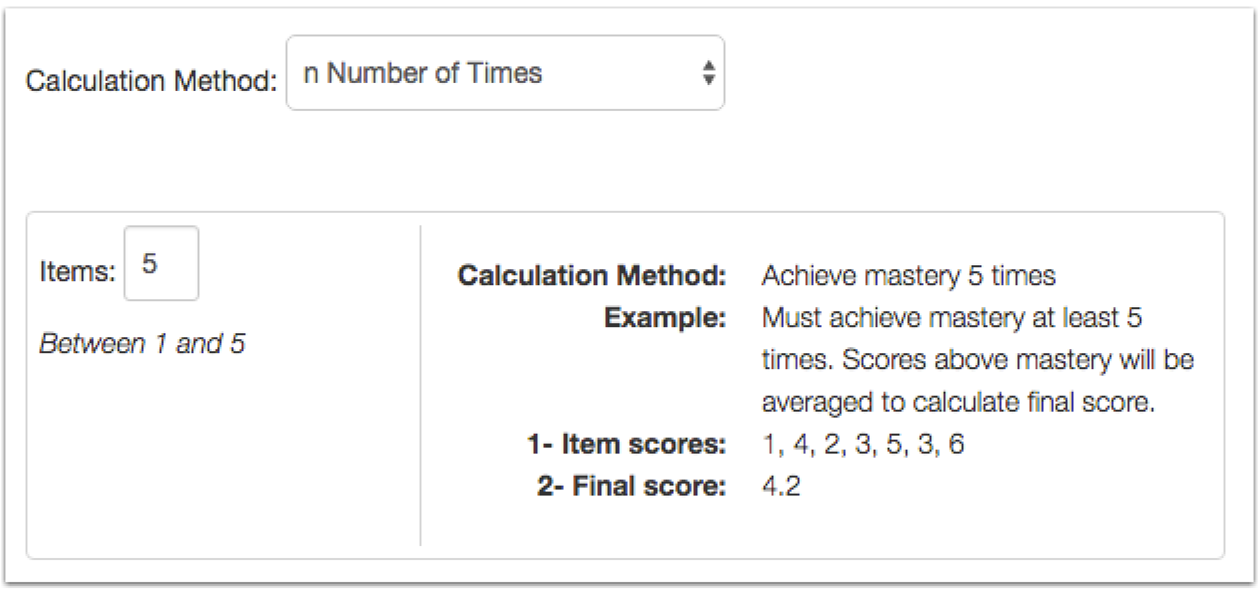
The term *decaying average* is traditionally used to describe a complex analysis: when an additional assessment is applied to an existing value, the prior decaying average is used to calculate the new decaying average. This method weights all assessments equally and calculates the average of learning over time. However, the Canvas method uses a simplified approach where Canvas calculates the average of all prior assessments and applies the value as a weighted percentage formula, instead of the alternative approach of simply using the prior decaying average.

By default, the Canvas decaying average is set at 65/35, meaning the current item is weighted at 65%, and the average of all other user scores is weighted at 35%. However, users can specify between 1% and 99% for the current percentage, and prior scores are weighted against the percentage difference. Note that the average is rounded to the next two decimals. If there is only one result, then the single score will be displayed.

For example, a student has four aligned items with scores of 4, 3, 2, and 5 (scores listed chronologically from oldest to most recent). If the current item is set to be weighted at 75% of mastery, prior scores are weighted at 25%:

- Current item score: 5
- Average of prior item scores: (4 + 3 + 2) / 3 = 3
- Calculated score: 5 (.75) + 3 (.25) = 3.75 + .75 = 4.5

Set n Number of Times



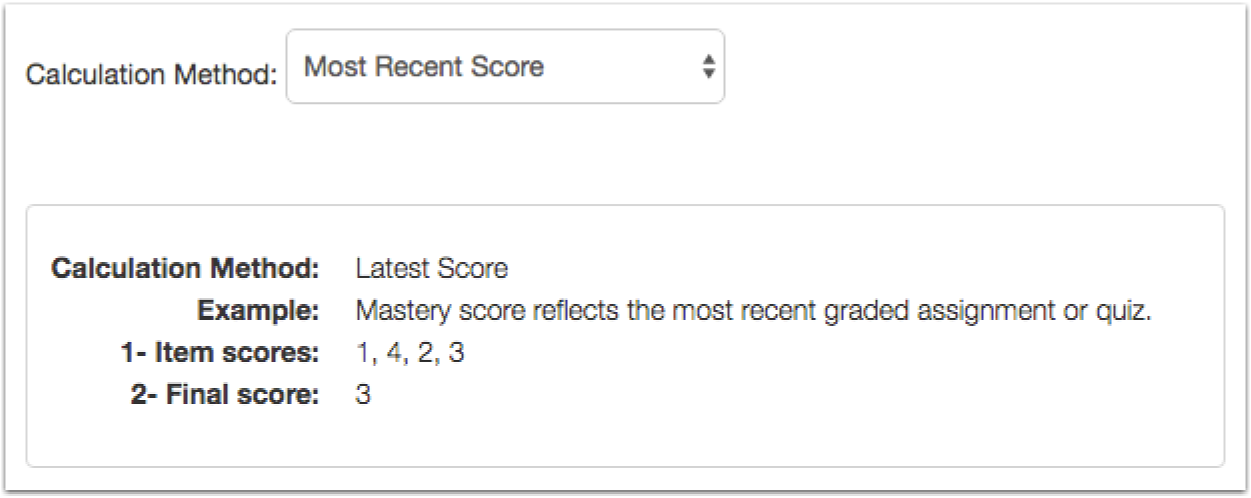
The **n Number of Times** calculation requires a specific number of times that mastery must be met or exceeded, and the number of aligned items that must be completed for calculation eligibility. Any scores that do not meet mastery are not part of the calculation.

Users can specify between 1 and 5 items required for mastery.

For example, a student is required to achieve mastery 2 times with a mastery score of 5. If the student has scores of 1, 3, 2, 4, 5, 3, and 6, only the scores of 5 and 6 would be part of the calculation.

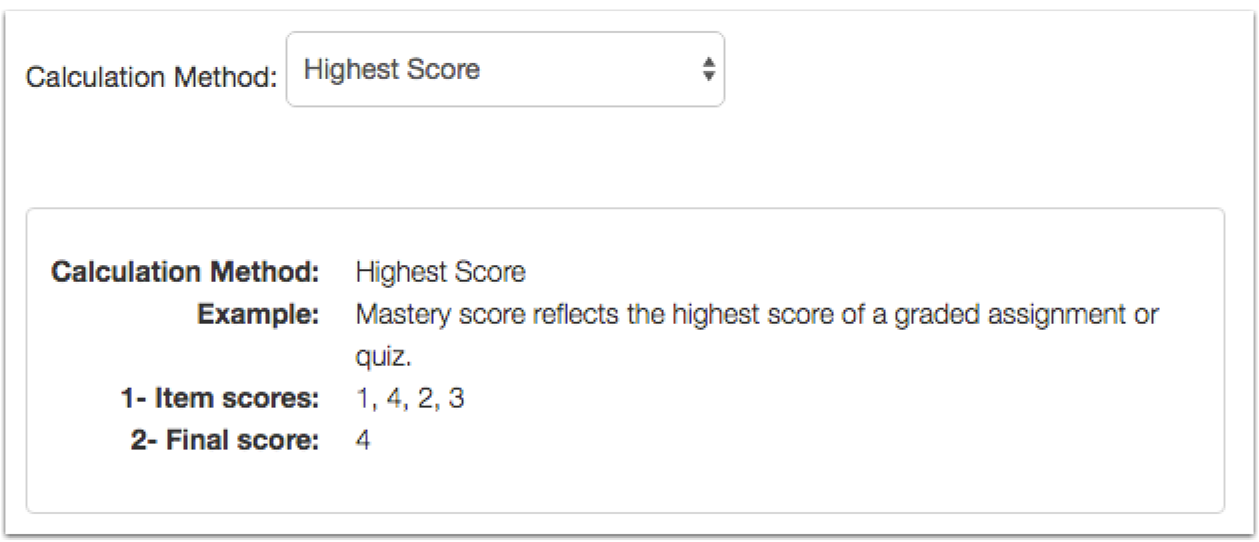
- Average score of eligible items: 5 + 6 = 11
- Calculated score: 11 / 2 = 5.5

Set Most Recent Score



The **Most Recent Score** calculation always selects the score for the most recent assessment item.

Set Highest Score



The **Highest Score** calculation always selects the highest score for all assessment items.

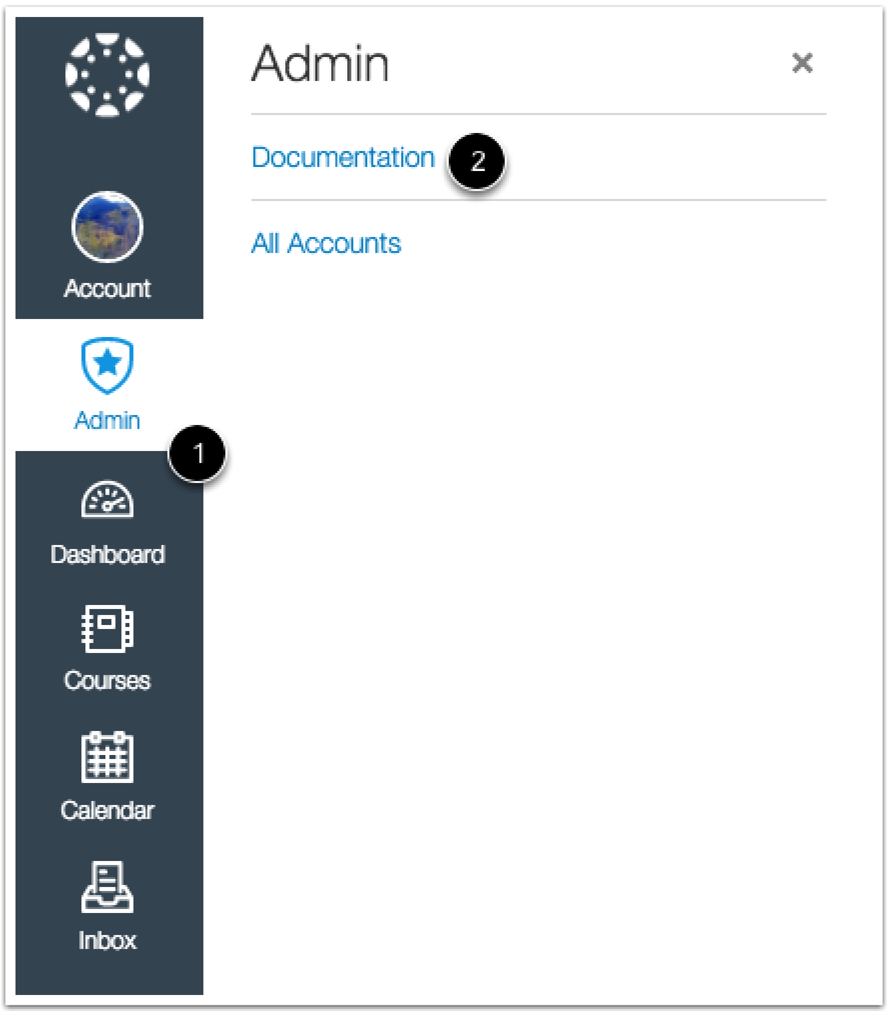
How do I create an outcome for an account?

Outcomes can be created from the account, sub-account, or course-level. You can create nested outcomes, or import State or Common Core Standards into your account, sub-account, or course.

Note: 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.

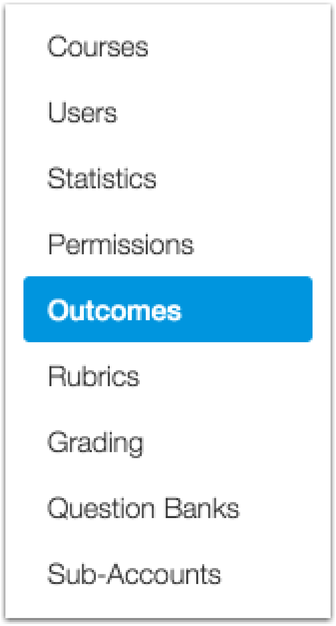
View a video about Outcomes.

Open Account



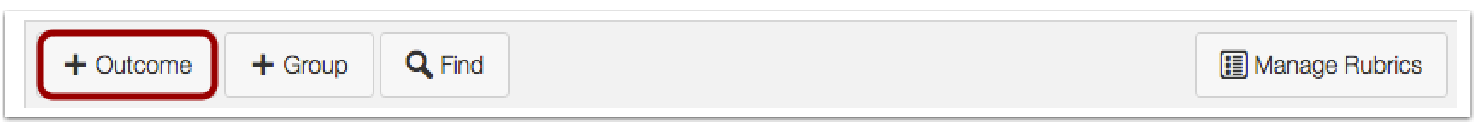
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



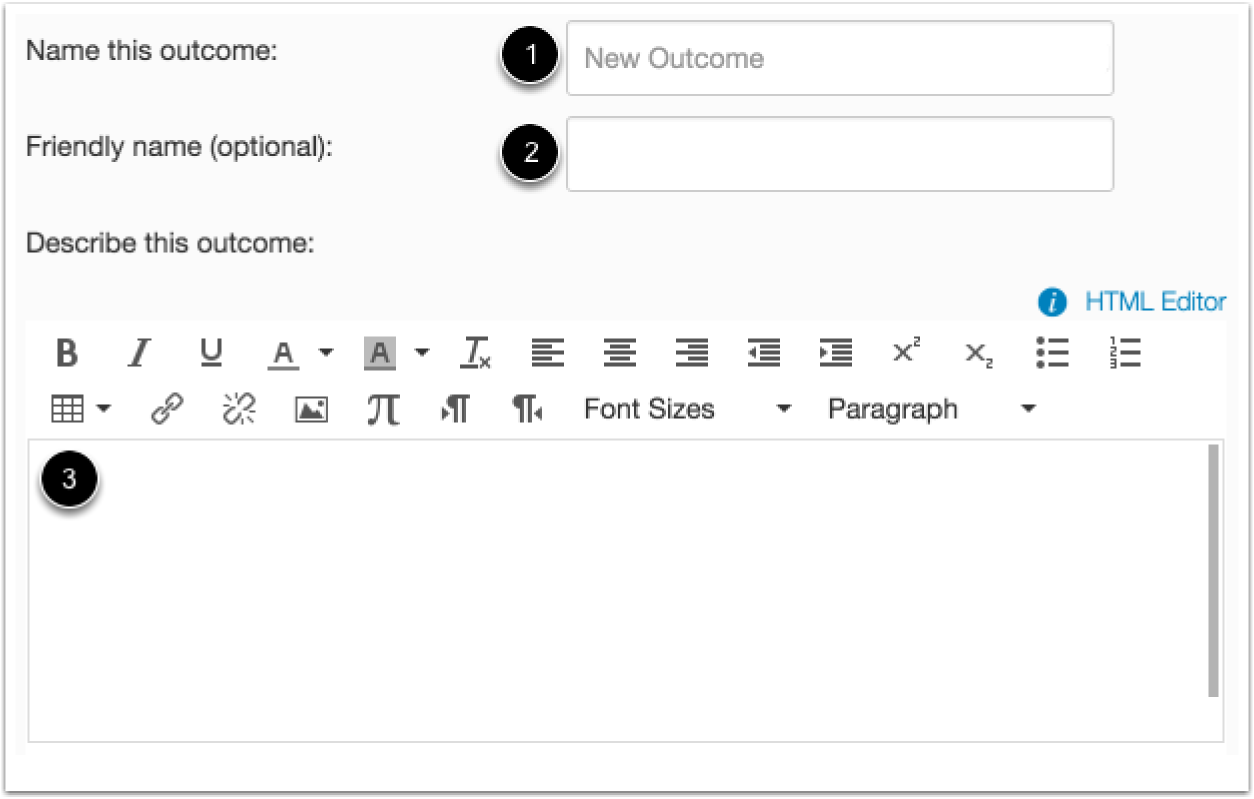
In Account Navigation, click the **Outcomes** link.

Add Outcome



Click the **New Outcome** button.

Create Outcome

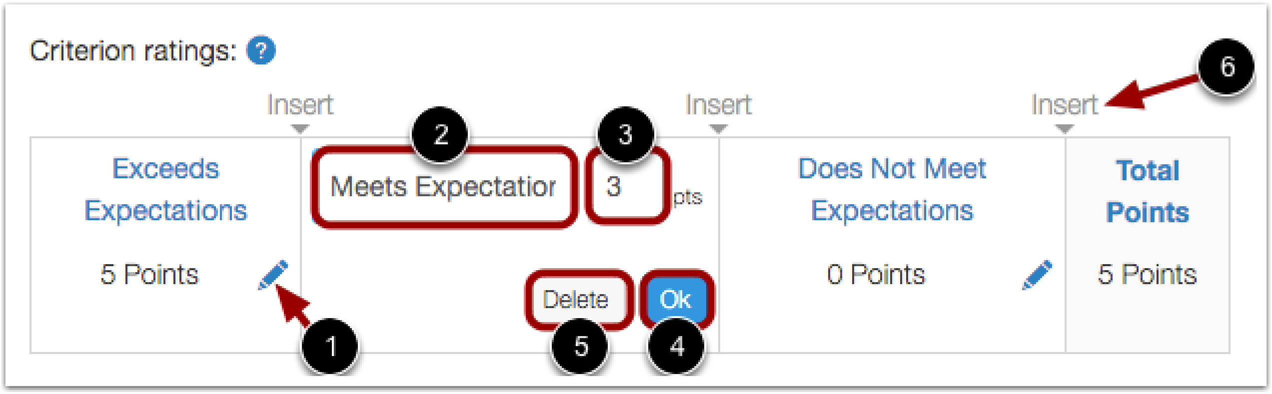


Enter a name for the outcome in the **Name this outcome** field [1].

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, more 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

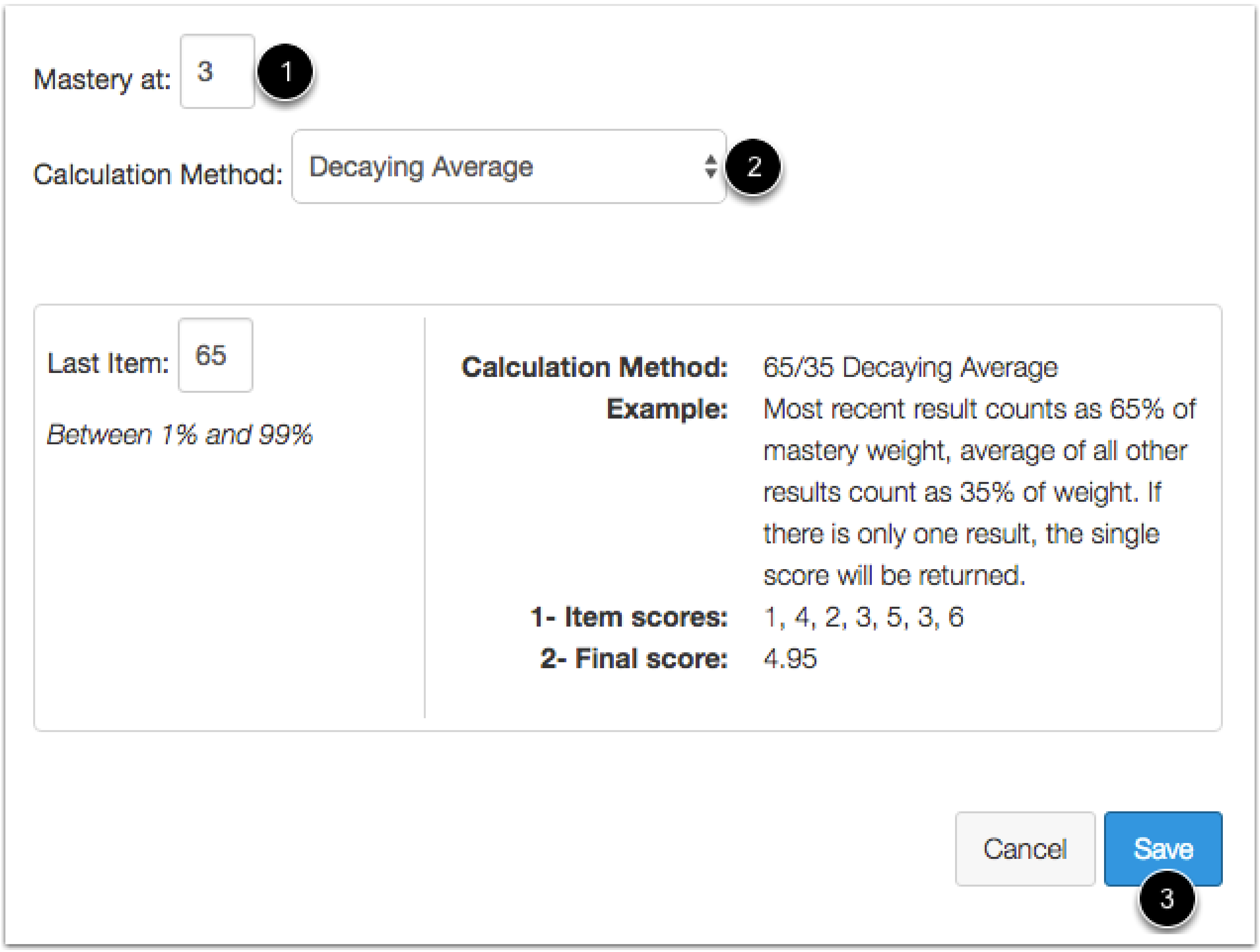


Click the **Edit** icon [1] to edit the criterion rating. You can change the existing name (if desired) for the criterion in the criterion name field [2]. Set the criterion point value by typing in the points field [3].

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

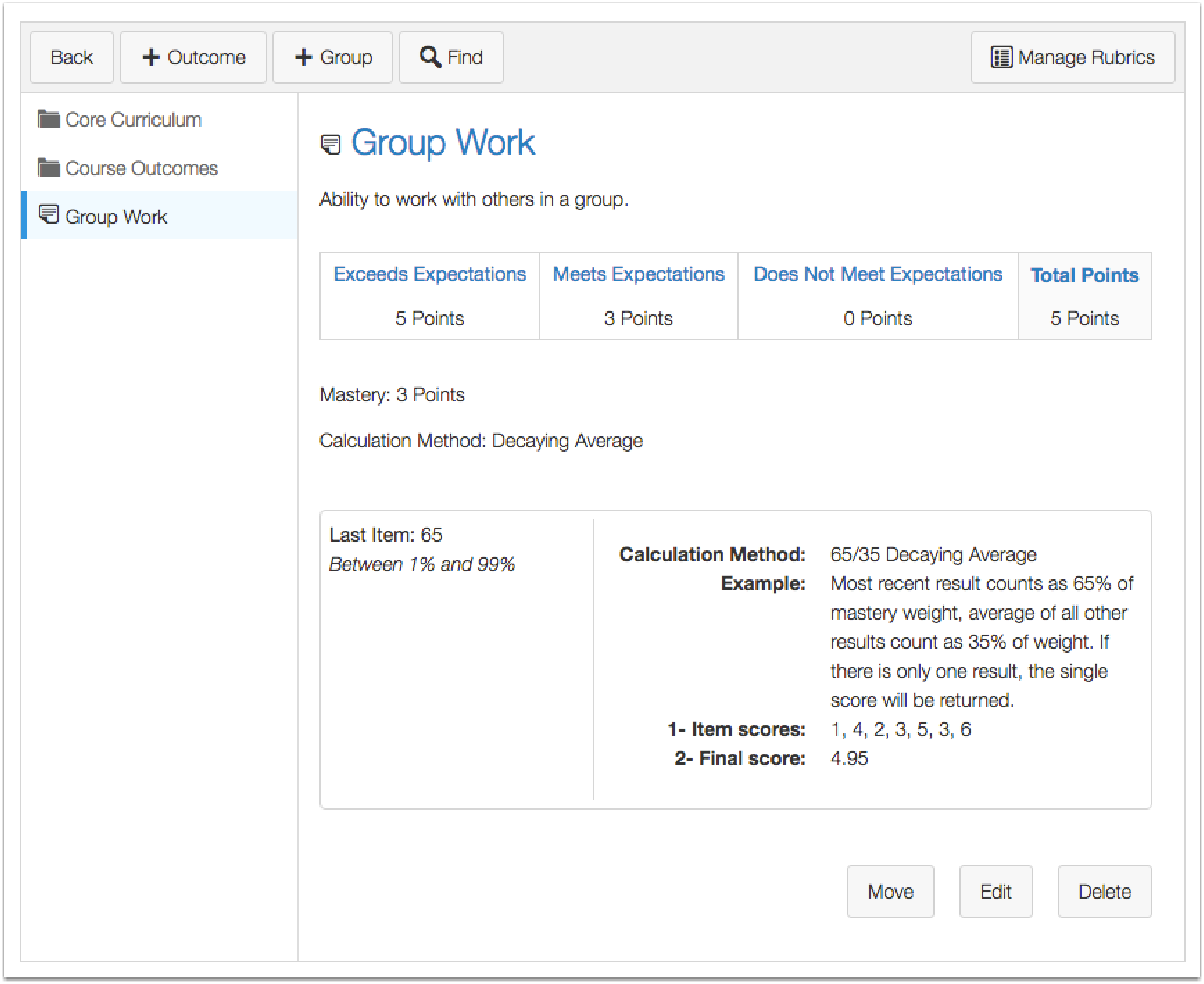


Set the mastery point value in the **Mastery at** field [1]. This field indicates the number of points that must be achieved for mastery according to the criterion ratings.

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. Learn more about the various Outcome calculation methods.

Click the **Save** button [3].

View Outcome

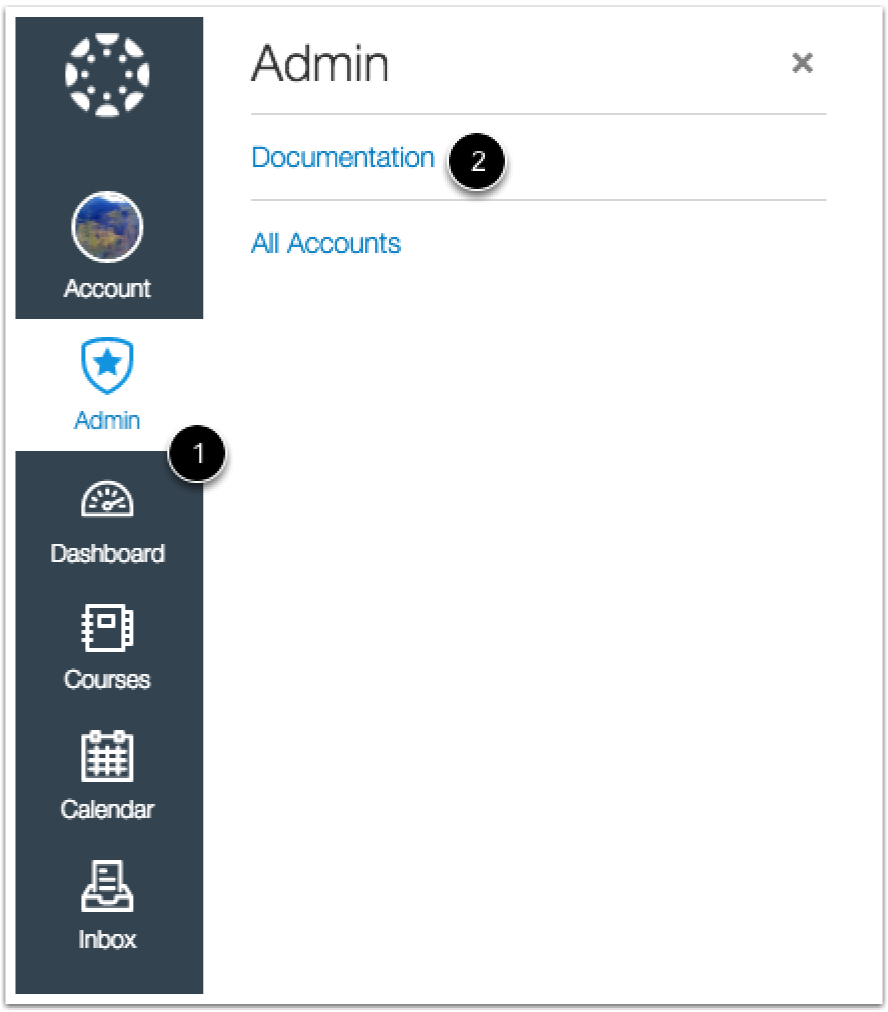


View created Outcome.

How do I create an outcome for a sub-account?

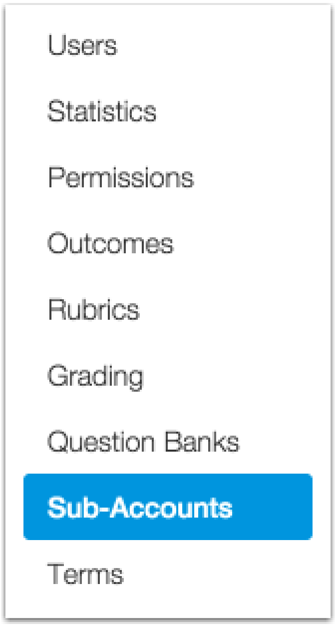
Outcomes can be created from the account, sub-account, or course-level. You can create nested outcomes, or import State or Common Core Standards into your account, sub-account, or course.

Open Account



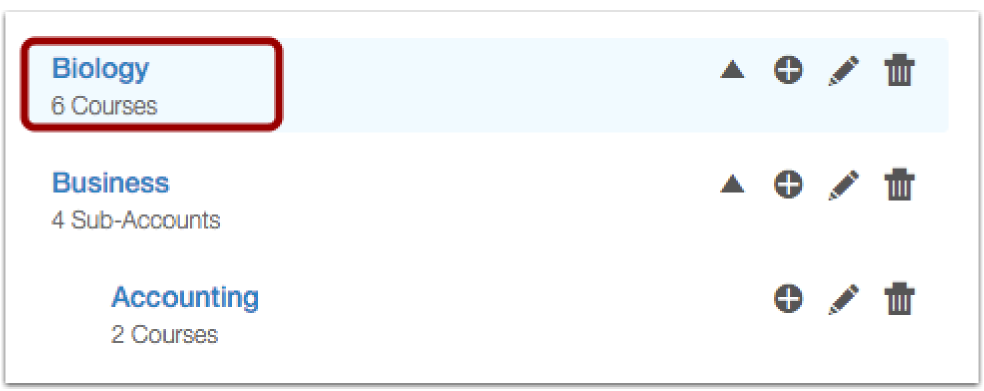
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Sub-Accounts



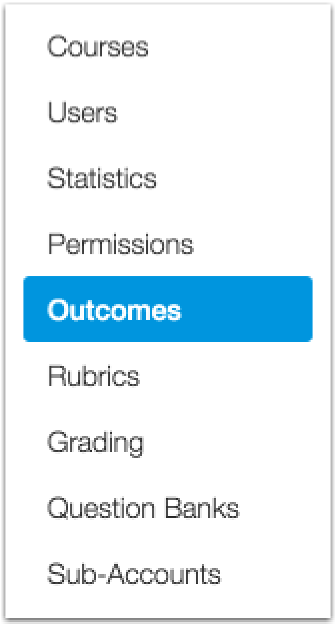
In Account Navigation, click the **Sub-Accounts** link.

Open Sub-Account



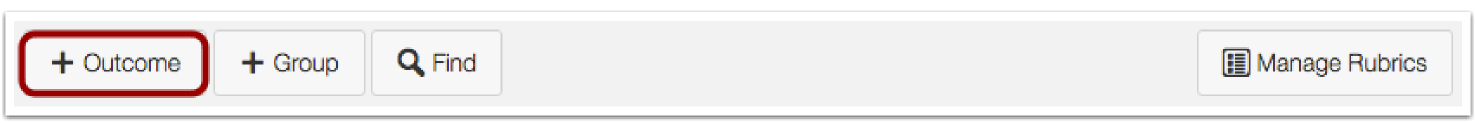
Click the sub-account you want to create a Learning Outcome for.

Open Outcomes



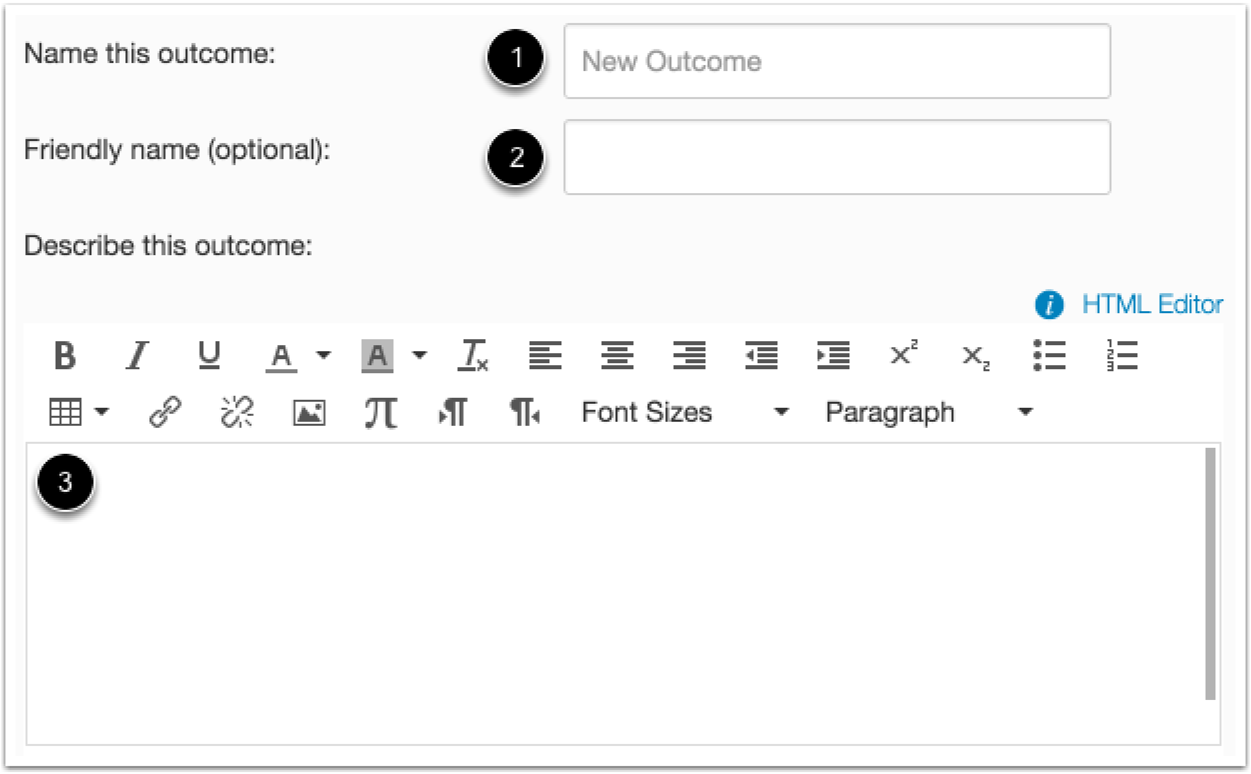
In Sub-Account Navigation, click the **Outcomes** link.

Add Outcome



Click the **New Outcome** button.

Create Outcome

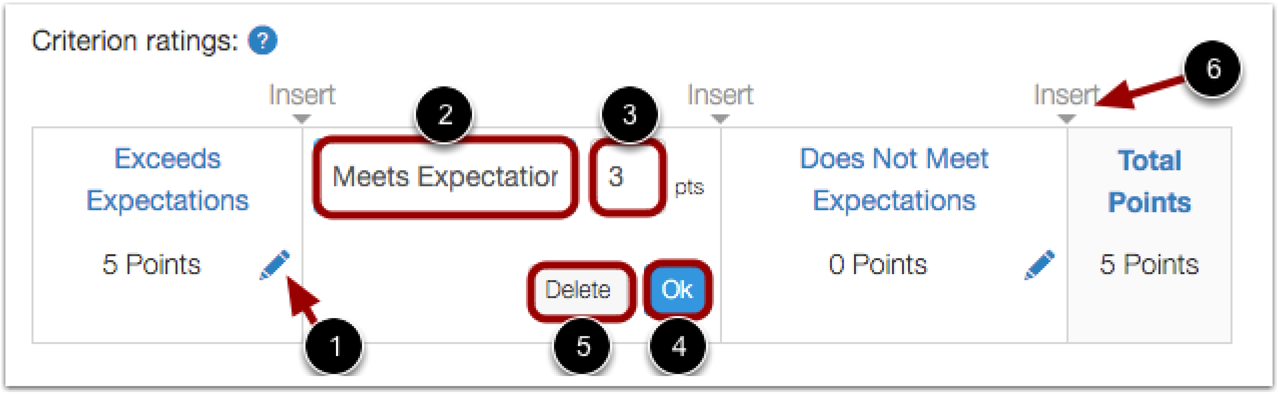


Enter a name for the outcome in the **Name this outcome** field [1].

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, more 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

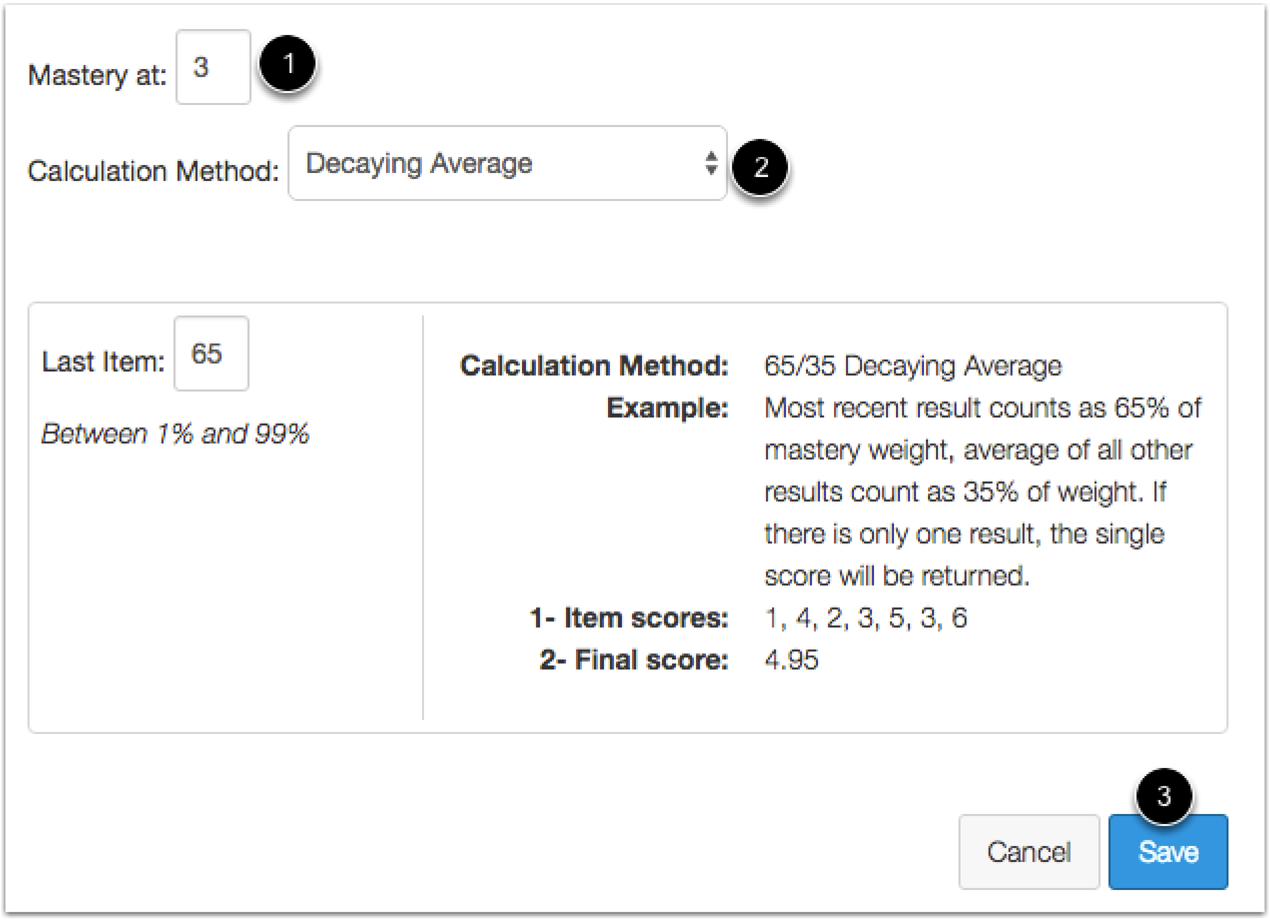


Click the **Edit** icon [1] to edit the criterion rating. You can change the existing name (if desired) for the criterion in the criterion name field [2]. Set the criterion point value by typing in the points field [3].

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

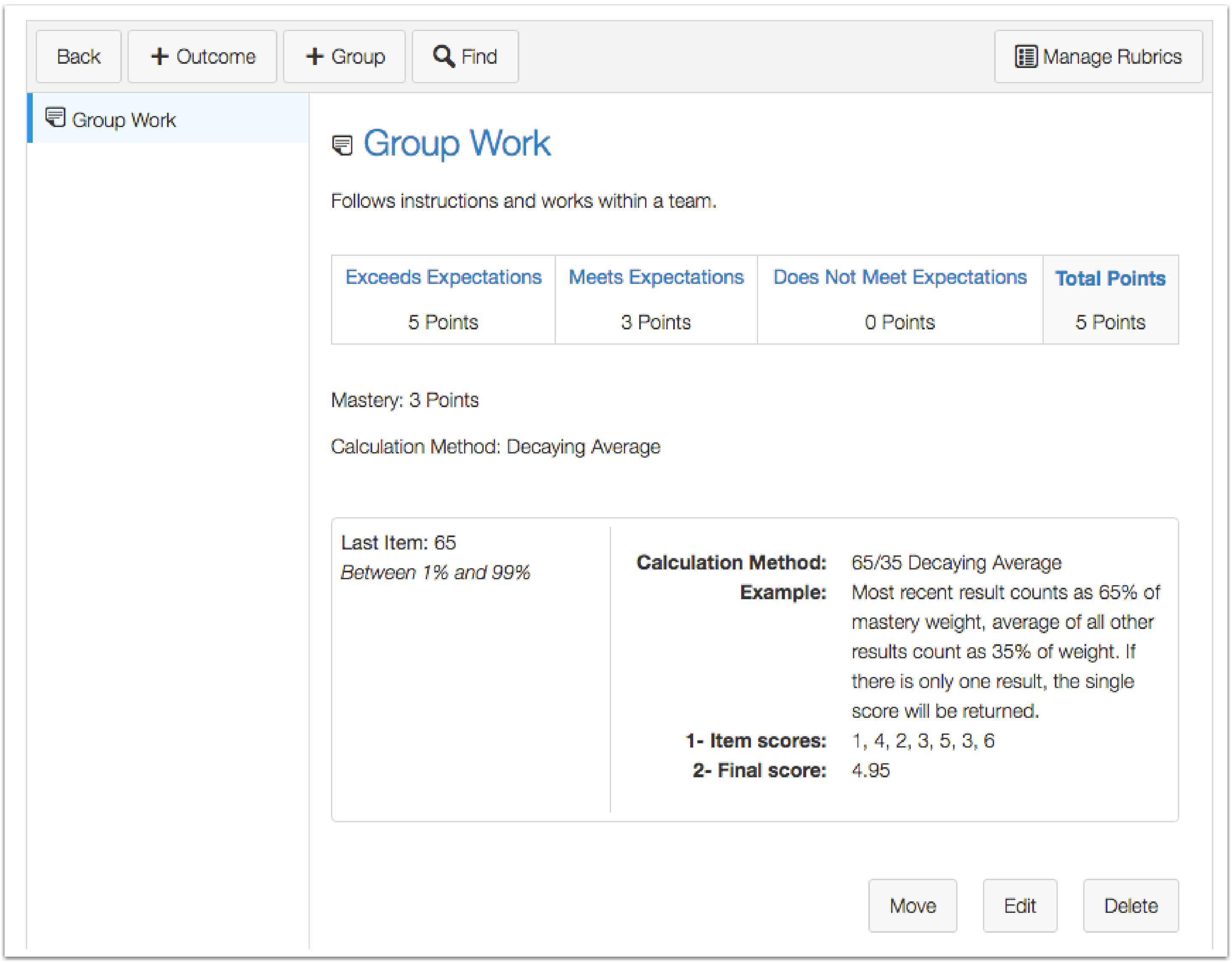


Set the mastery point value in the **Mastery at** field [1]. This field indicates the number of points that must be achieved for mastery according to the criterion ratings.

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. Learn more about the various Outcome calculation methods.

Click the **Save** button [3].

View Outcome

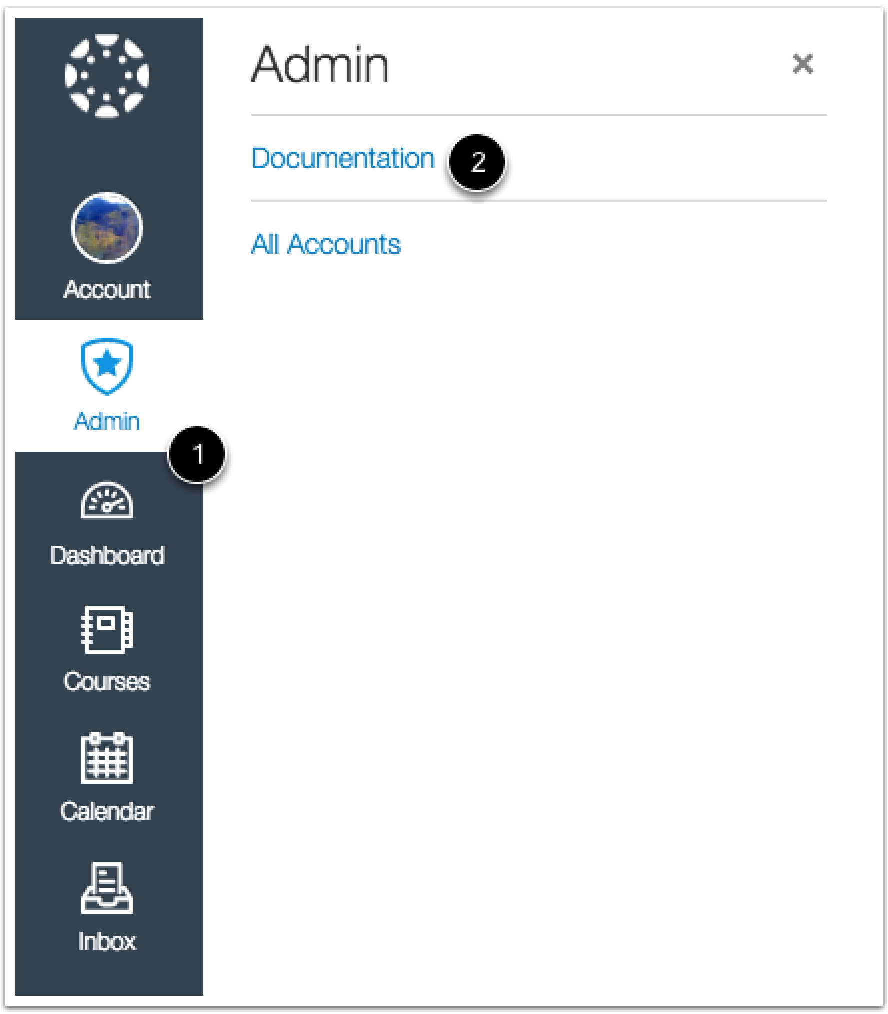


View created Outcome.

How do I create outcome groups for an account?

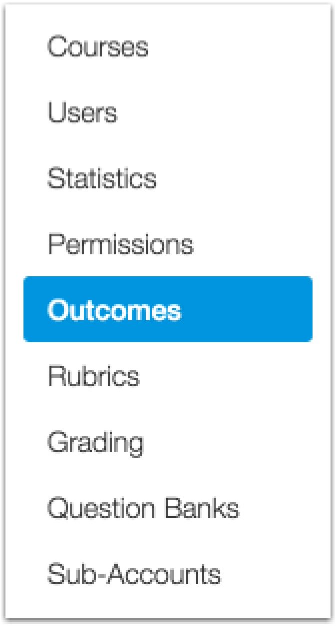
Grouping learning outcomes in an account allows for organization of multiple related outcomes.

Open Account



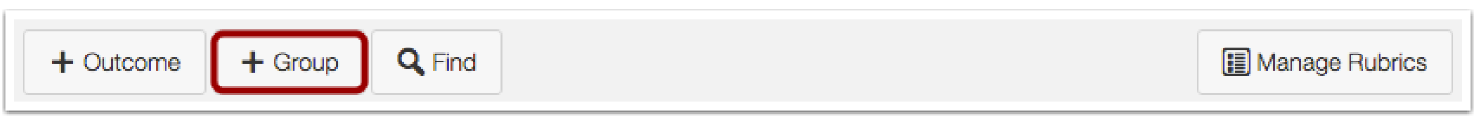
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



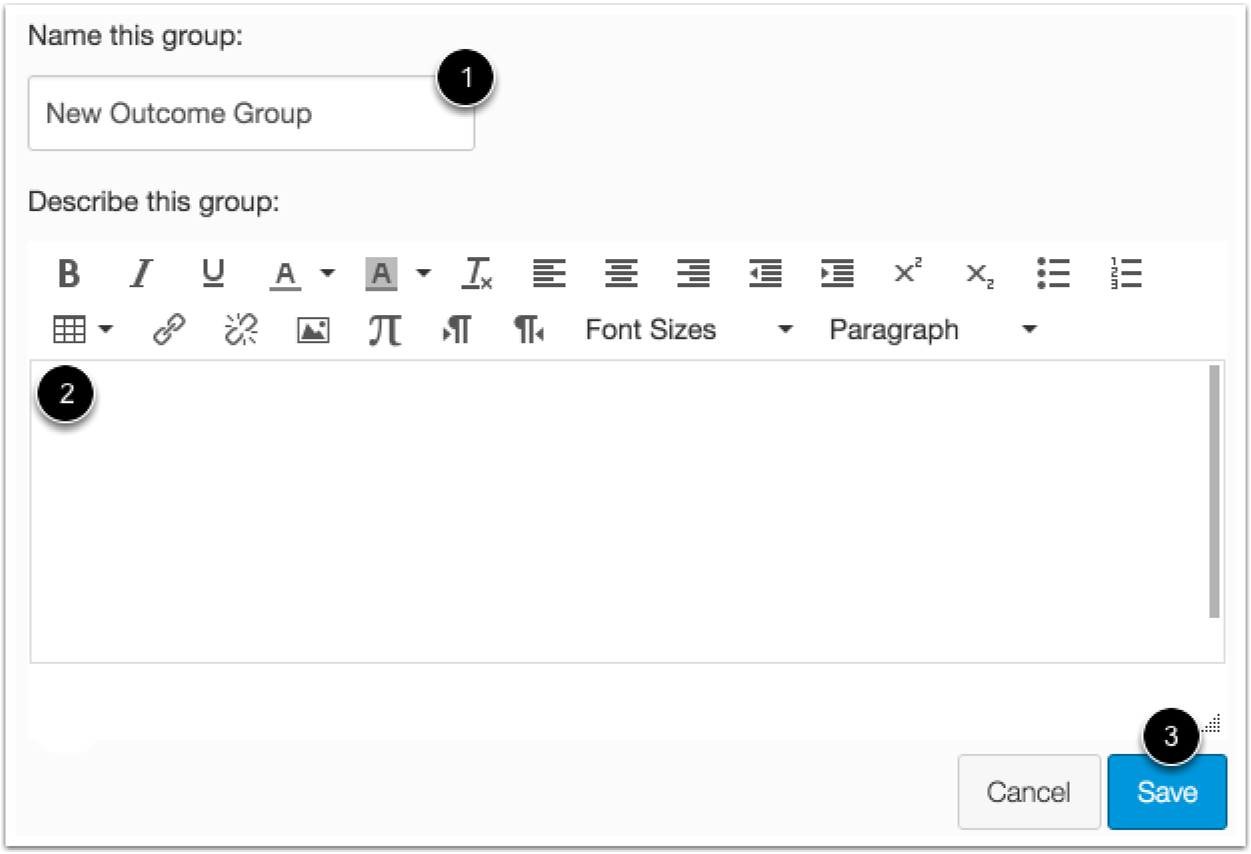
In Account Navigation, click the **Outcomes** link.

Add Outcome Group



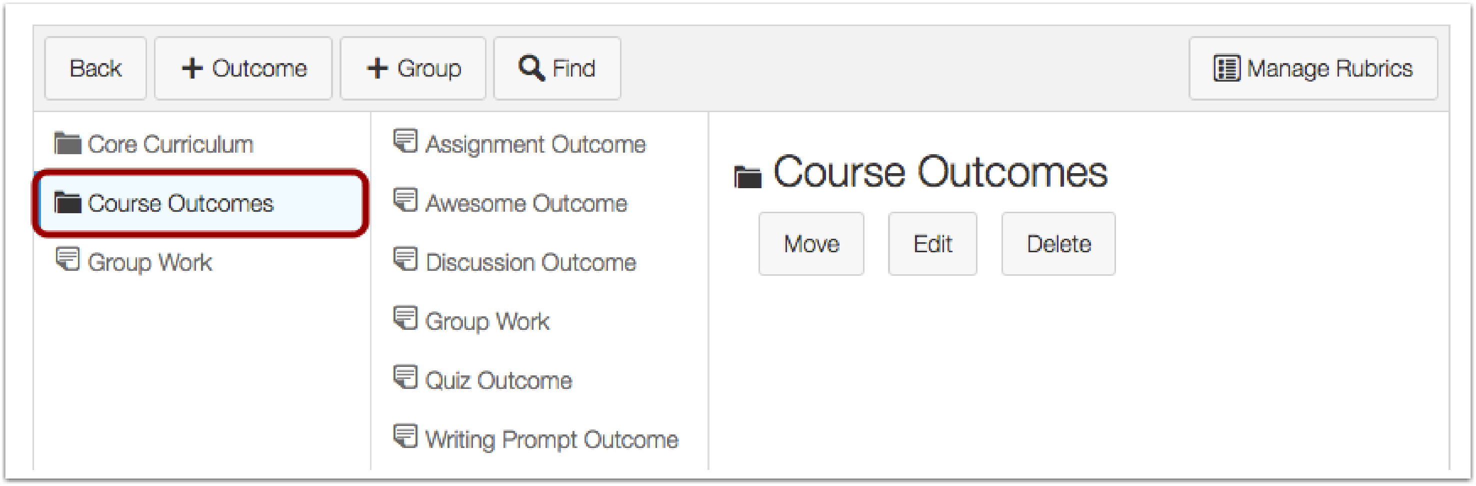
Click the **New Group** button.

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

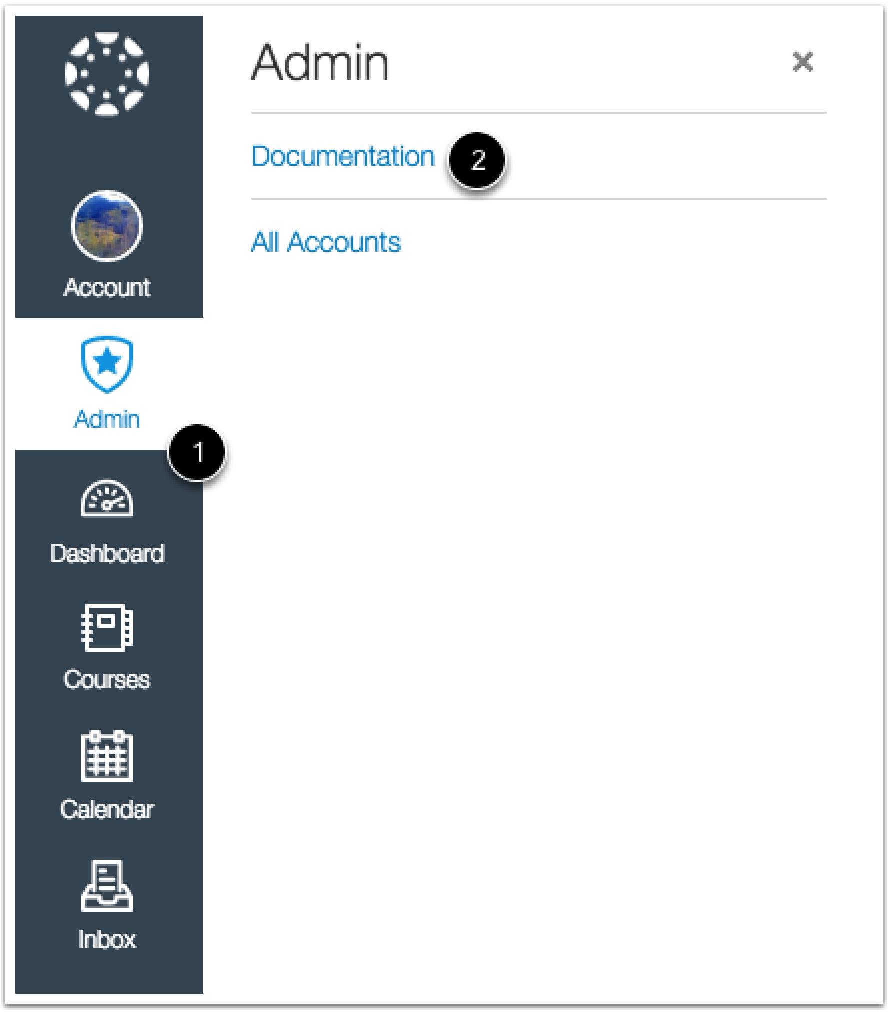


View the Outcome group. You can create new outcomes within the group by creating a new outcome. You can also move outcomes and outcome groups into the new group.

How do I create outcome groups for a sub-account?

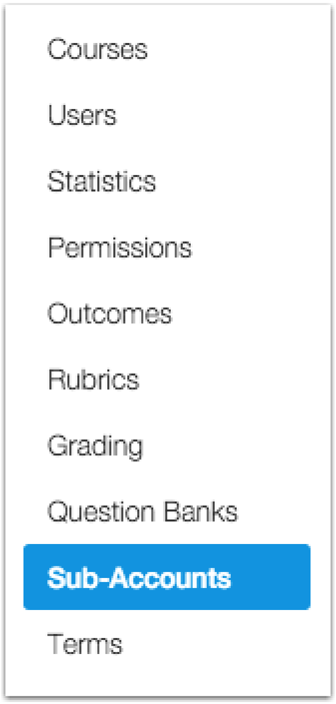
Grouping learning outcomes in a sub-account allows for organization of multiple related outcomes.

Open Account



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

Open Sub-Accounts

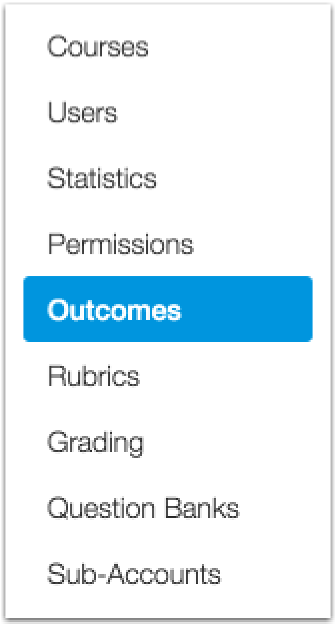


In Account Navigation, click the **Sub-Accounts** link.

Open Sub-Account

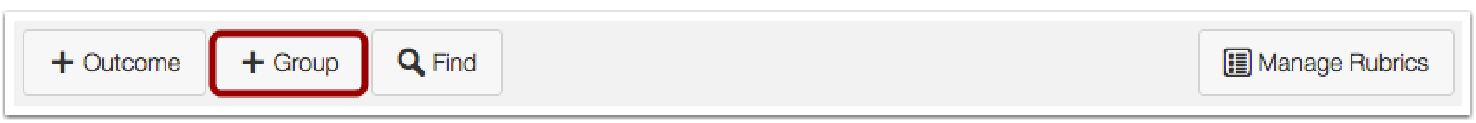
Open the sub-account by clicking the **sub-account** name.

Open Outcomes



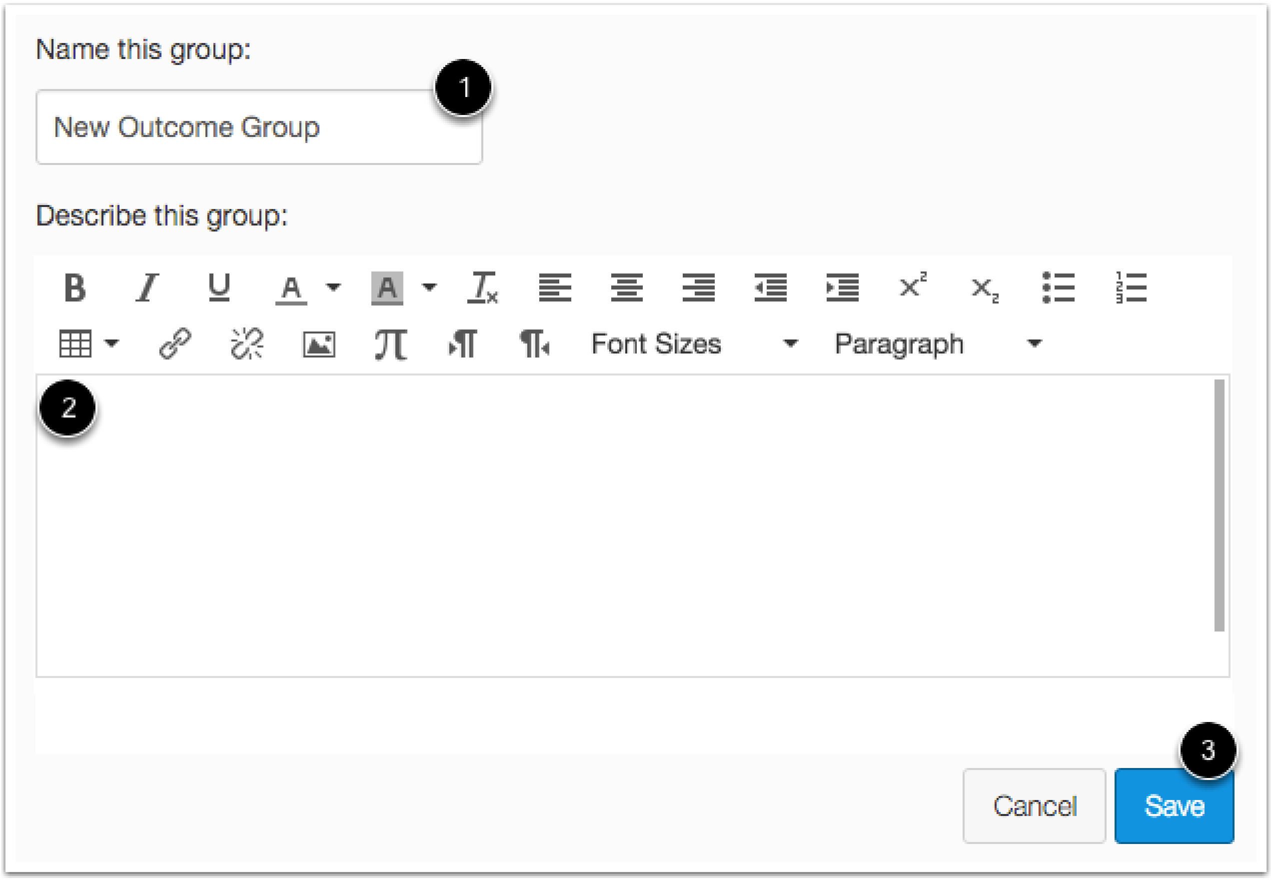
In Sub-Account Navigation, click the **Outcomes** link.

Add Outcome Group



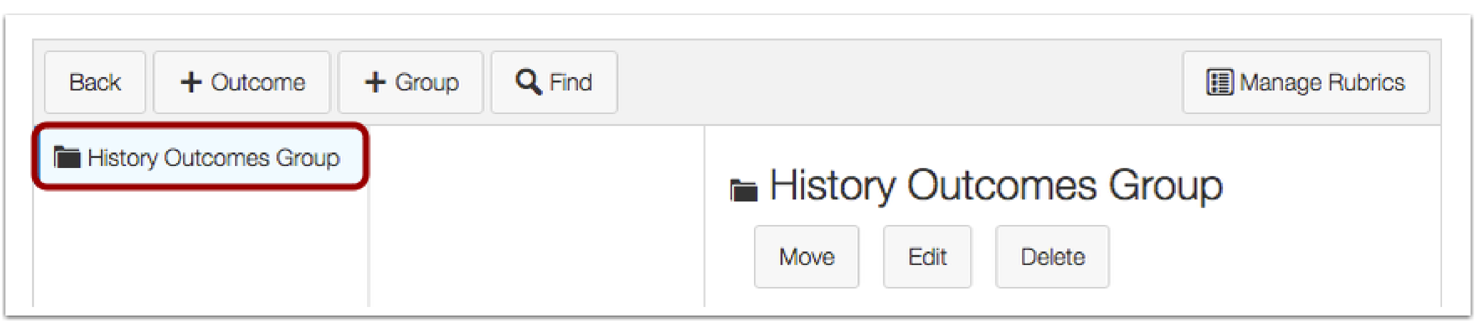
Click the **New Group** button.

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 edit or delete an outcome or outcome group in an account or sub-account?

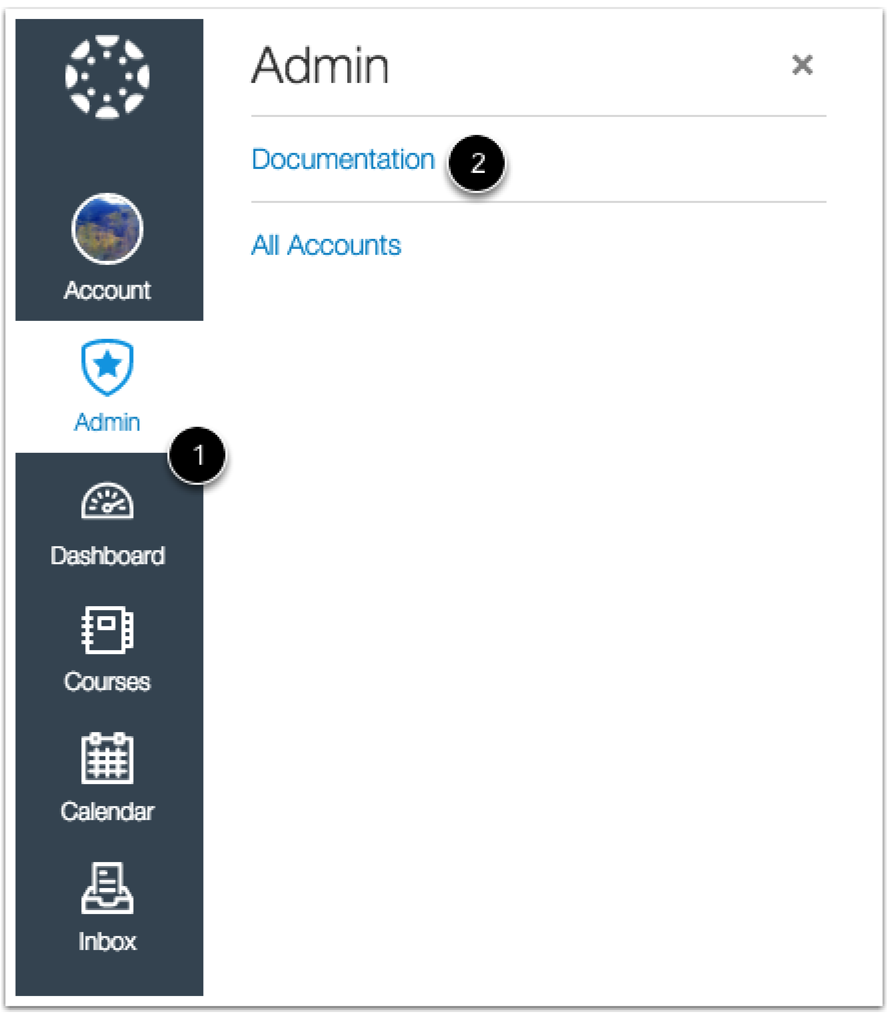
If you created an outcome in your account or sub-account that you need to edit or delete, you can do so as long as the outcome has not yet been used to assess a student. Once the outcome has been used for scoring, you cannot modify the outcome.

You can delete an outcome group as long as it does not contain any outcomes that cannot be modified.

Notes:

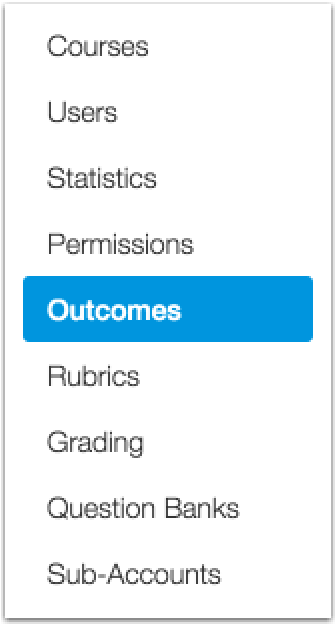
- You can modify any outcomes or outcome groups where you have permission.
- Outcomes that cannot be edited but can be deleted are aligned with a question bank but have not yet been used to assess a student.

Open Account



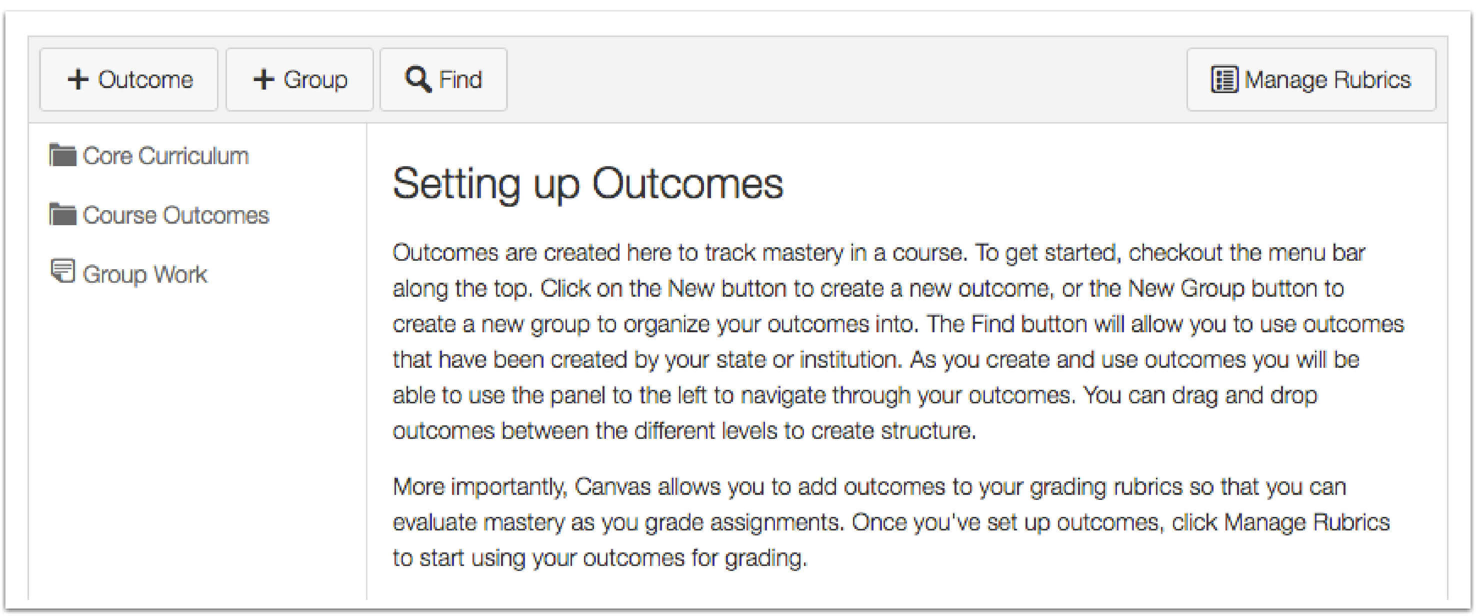
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



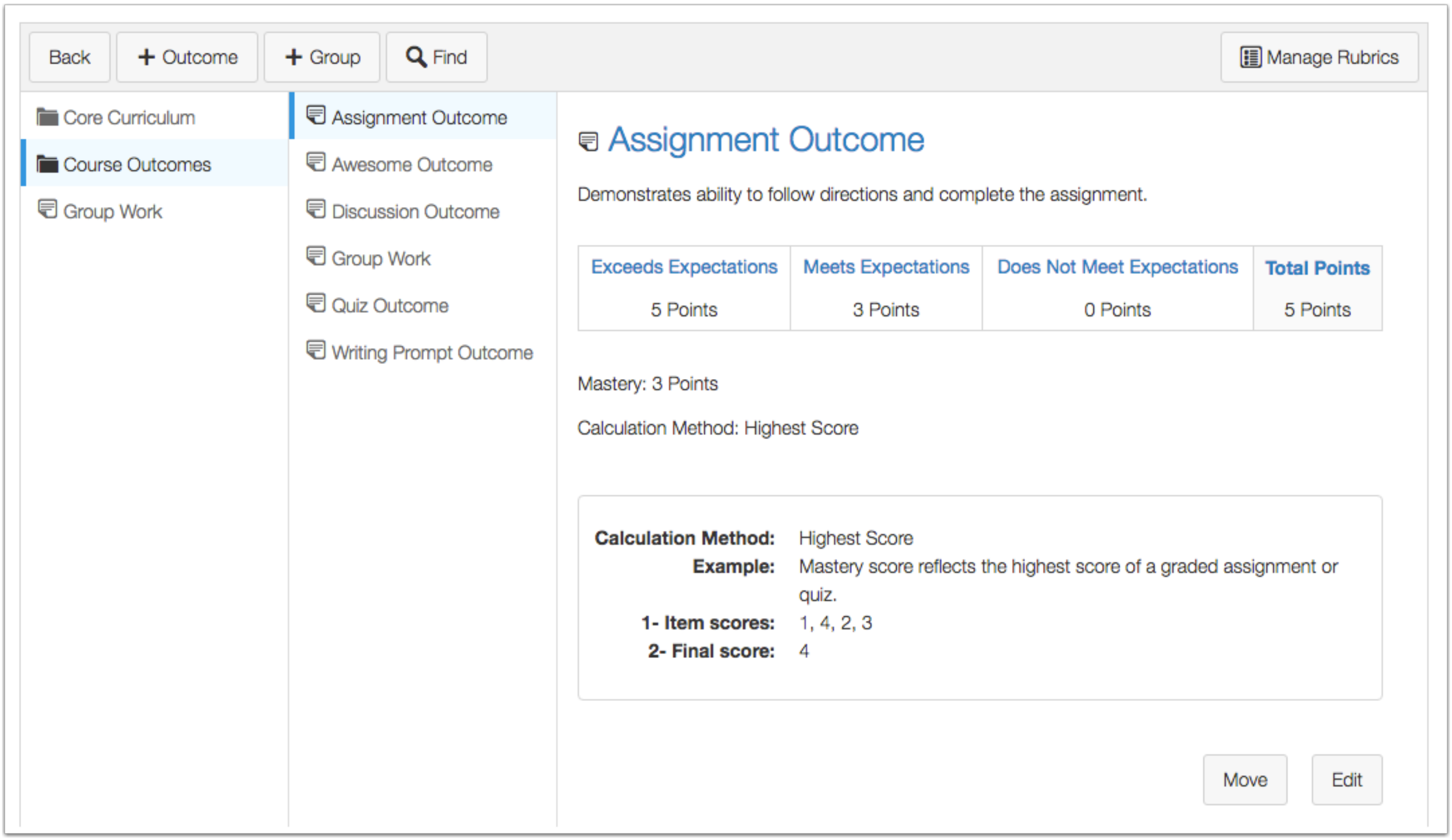
In Account or Sub-Account Navigation, click the **Outcomes** link.

Select Outcome or Outcome Group



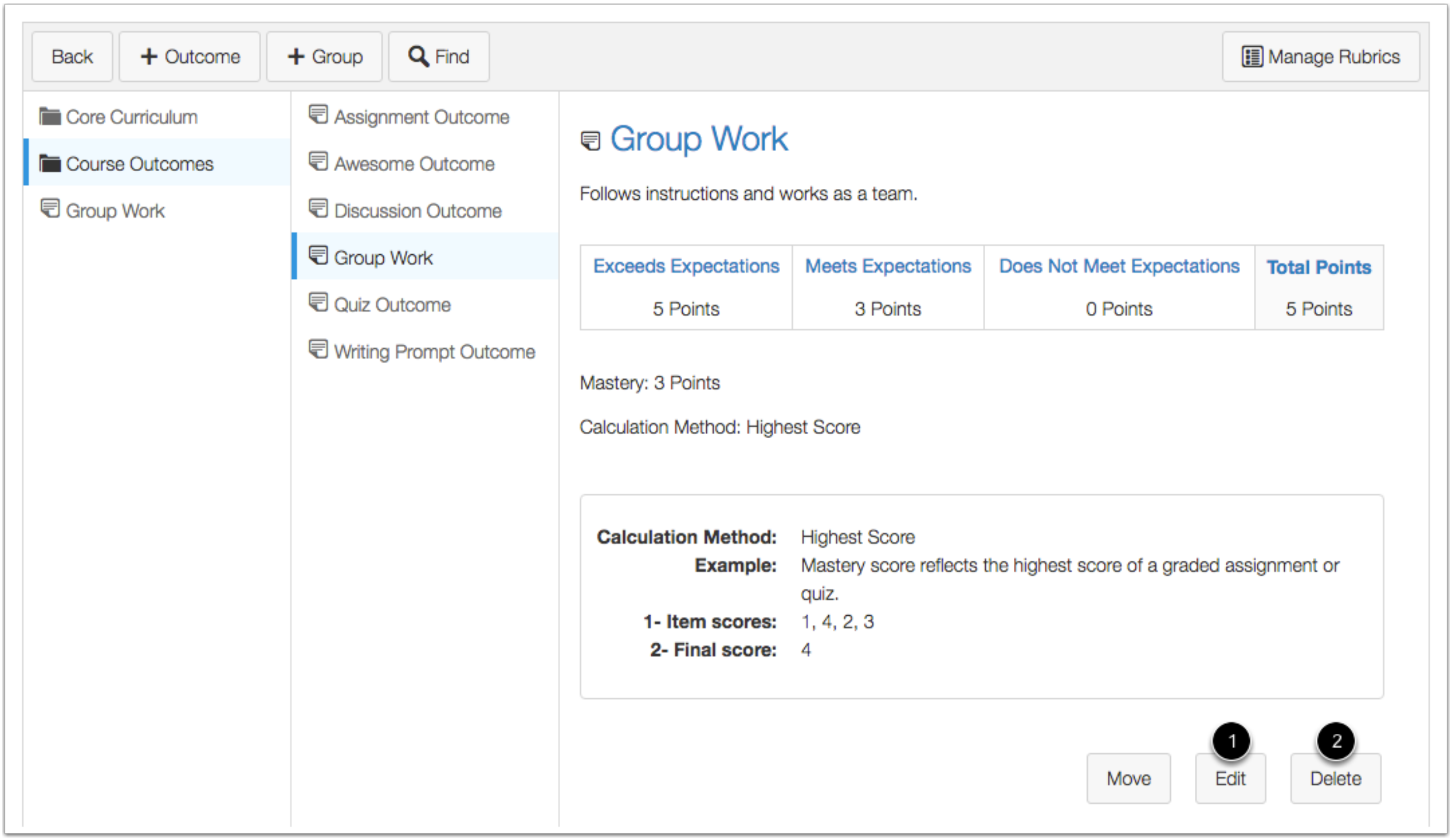
Locate the outcome or outcome group you want to modify.

View Assessed Outcome



If an outcome has already been used to assess a student, the option to delete it will be unavailable.

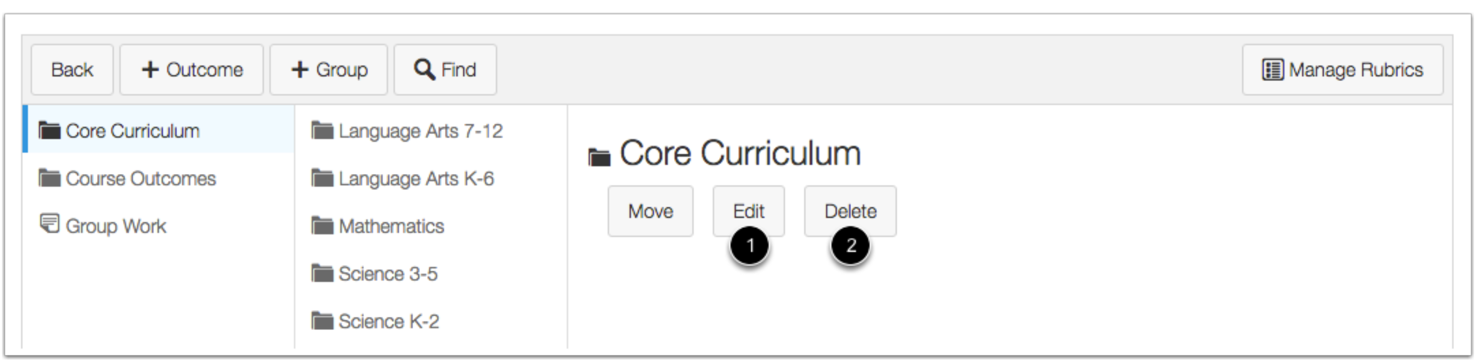
Modify Outcome



To edit an outcome, click the **Edit Outcome** button [1]. Editing an outcome lets you change the outcome name, description, calculation method, and other elements as set when creating an account outcome or creating a sub-account outcome.

To delete an outcome, click the **Delete Outcome** button [2].

Modify Outcome Group



To edit an outcome group, click the **Edit Outcome Group** button [1]. Editing an outcome group lets you change the outcome name and description as set when creating an account outcome group or creating a sub-account outcome group.

To delete an outcome group, click the **Delete Outcome Group** button [2].

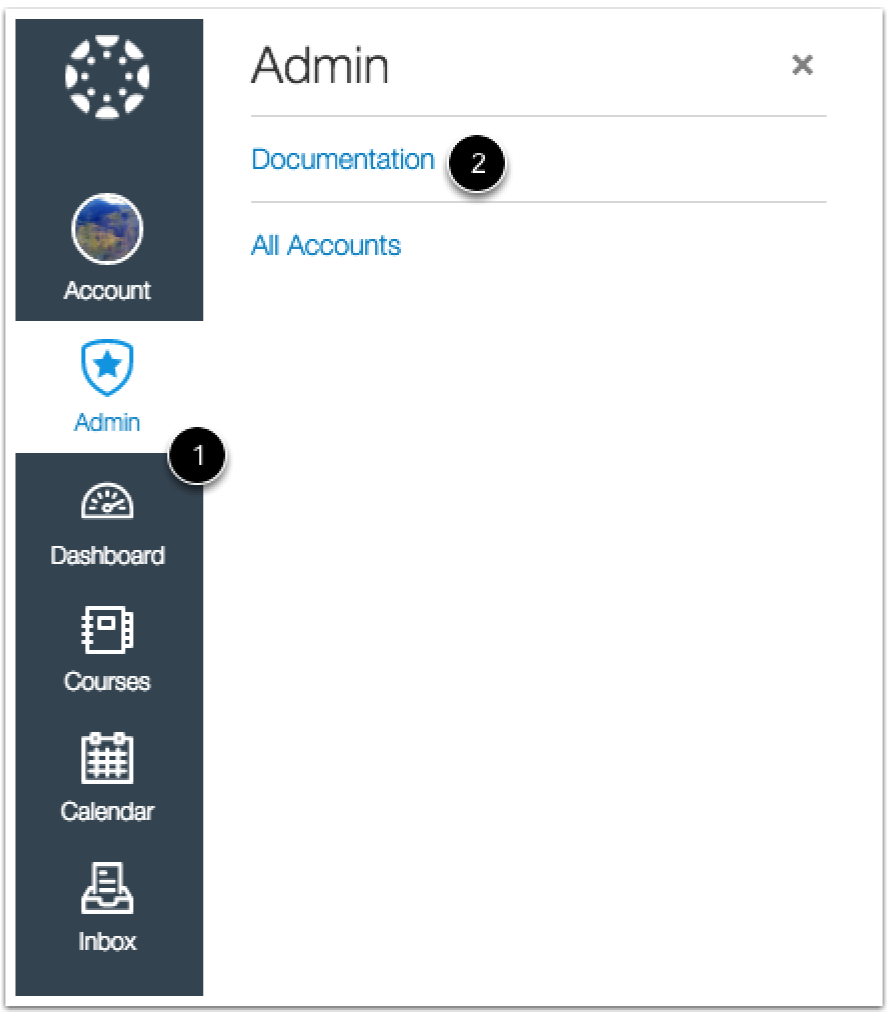
Note: If you delete an outcome group and the outcome group generates an error, your outcome group contains an outcome that cannot be modified. Move the outcome to another outcome group, then try deleting the outcome group again.

How do I create custom account or sub-account outcome names for students?

As an admin, you can choose to allow the Student Learning Mastery Gradebook 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.

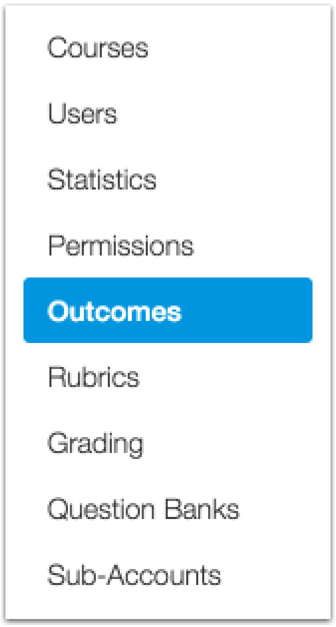
Note: For instructors, creating a custom name is a course permission. If they have access, instructors can create friendly names for outcomes they create at the course level. However, they cannot create custom names for outcomes created at the account level.

Open Account



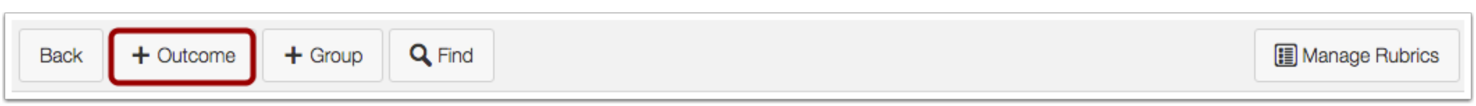
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



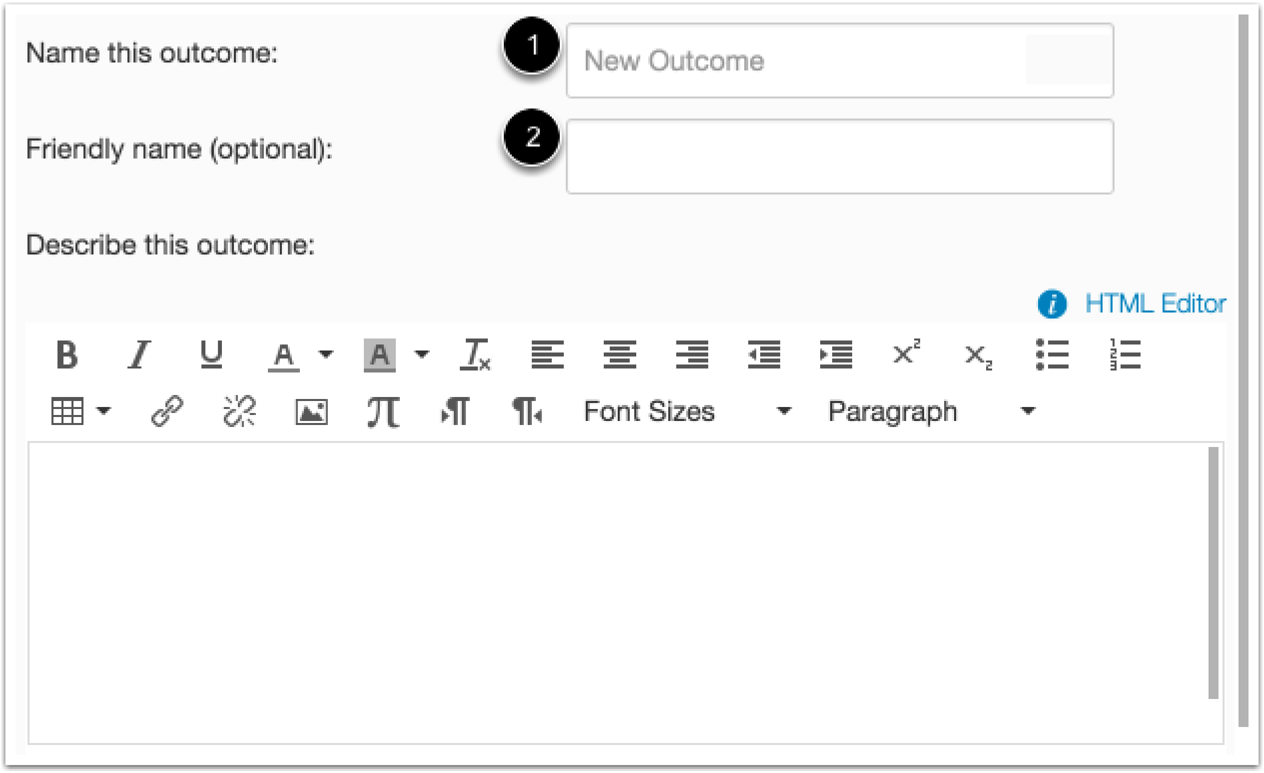
In Account or Sub-Account Navigation, click the **Outcomes** link.

Create New Outcome



If you want to create a friendly name while creating a new Outcome, click the **New Outcome** button.

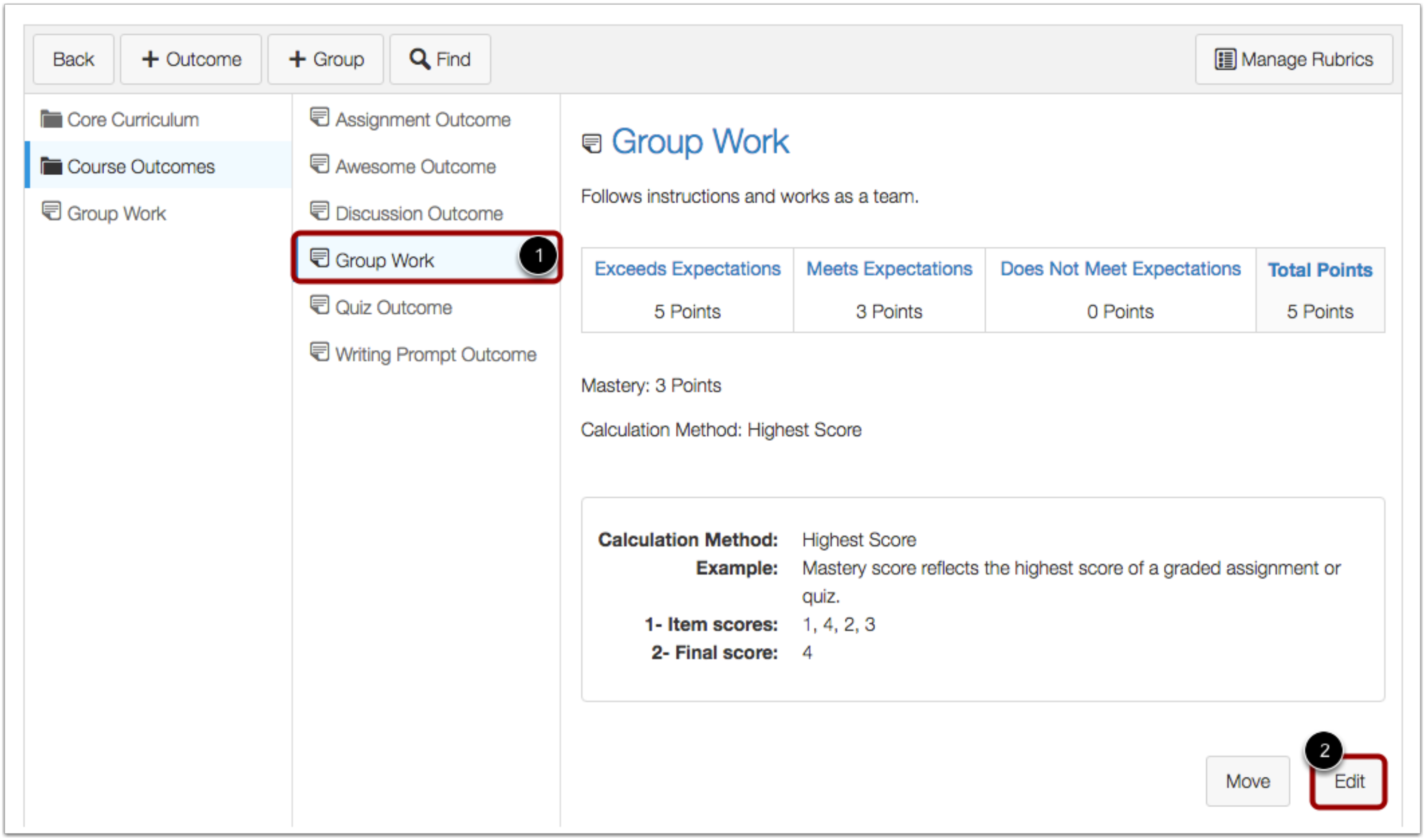
Create Friendly Name



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.

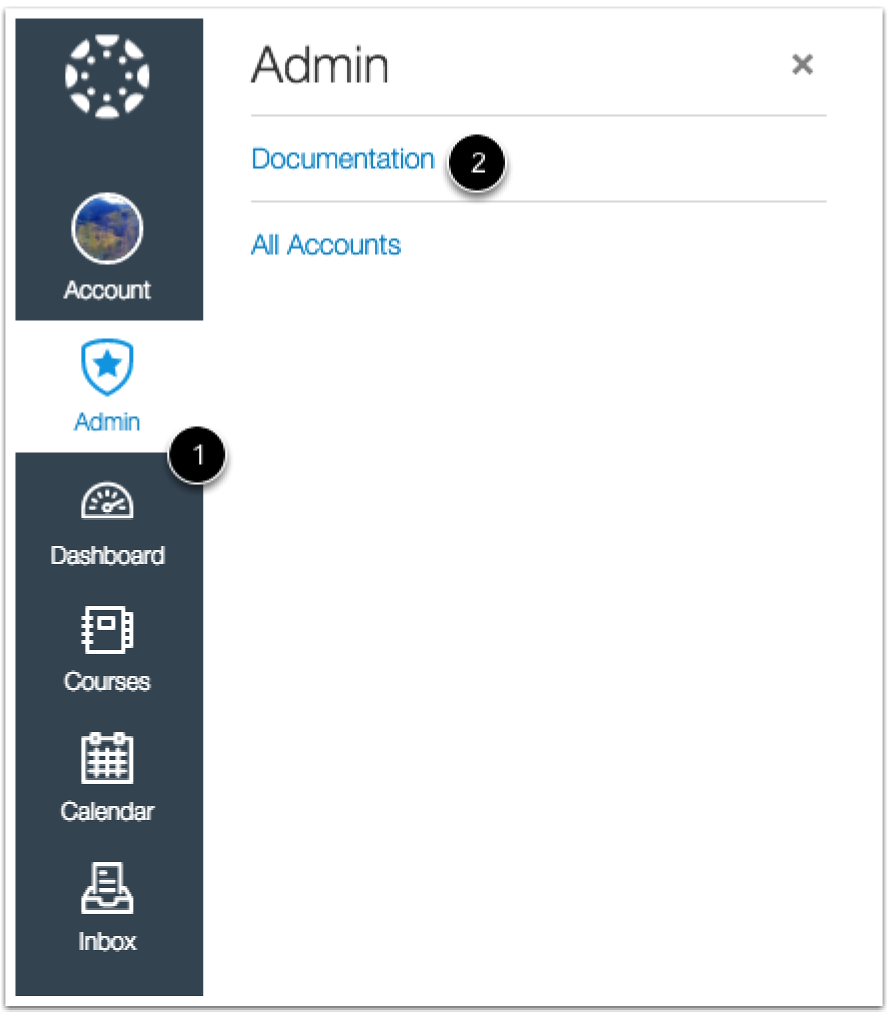
Note: Your friendly name will not appear as part of the Outcomes Index page.

How do I move outcomes and outcome groups in an account or sub-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.

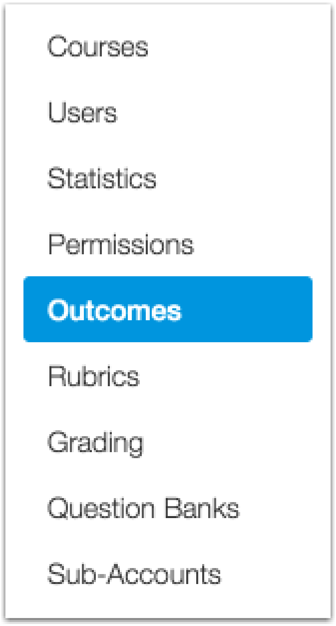
Note: To move an outcome to an outcome group, you will need to create an outcome group.

Open Account



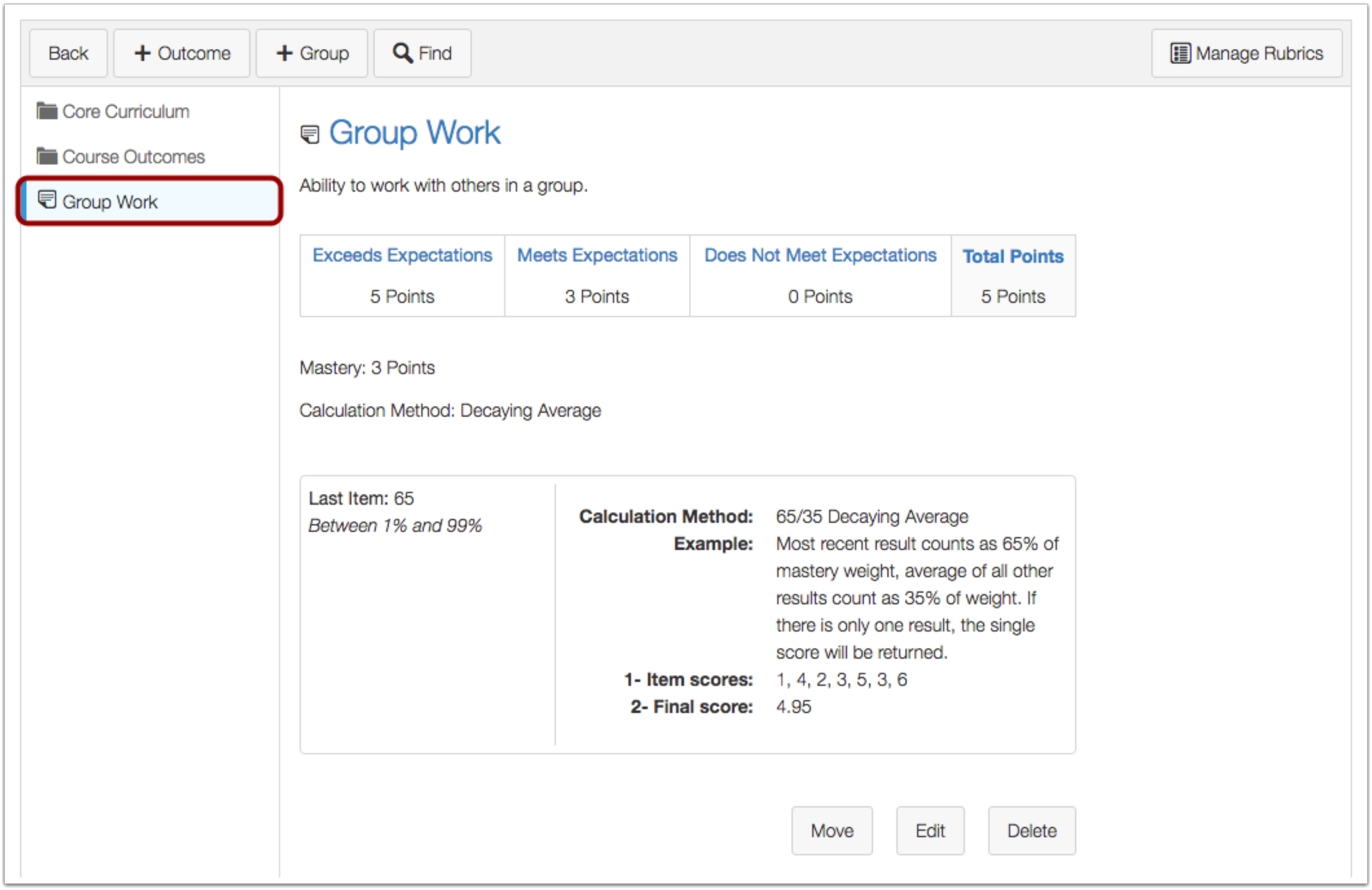
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



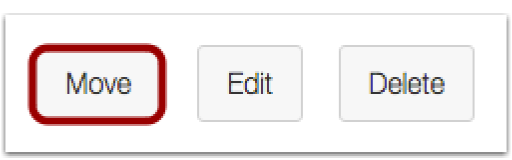
In Account or Sub-Account Navigation, click the **Outcomes** link.

Select Outcome

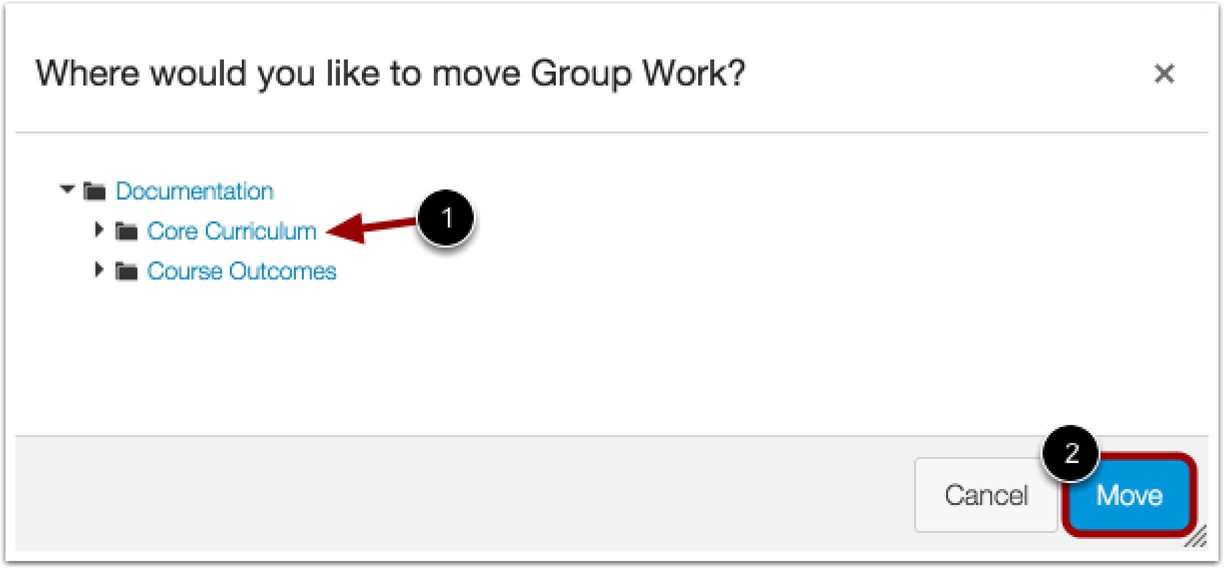


Locate the outcome or outcome group you wish to move.

Move Outcome or Outcome Group



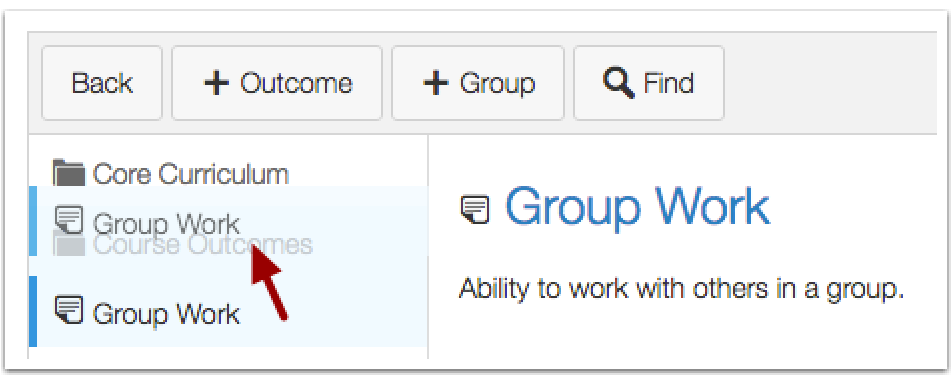
To move an individual outcome or outcome group, click the **Move** button.



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



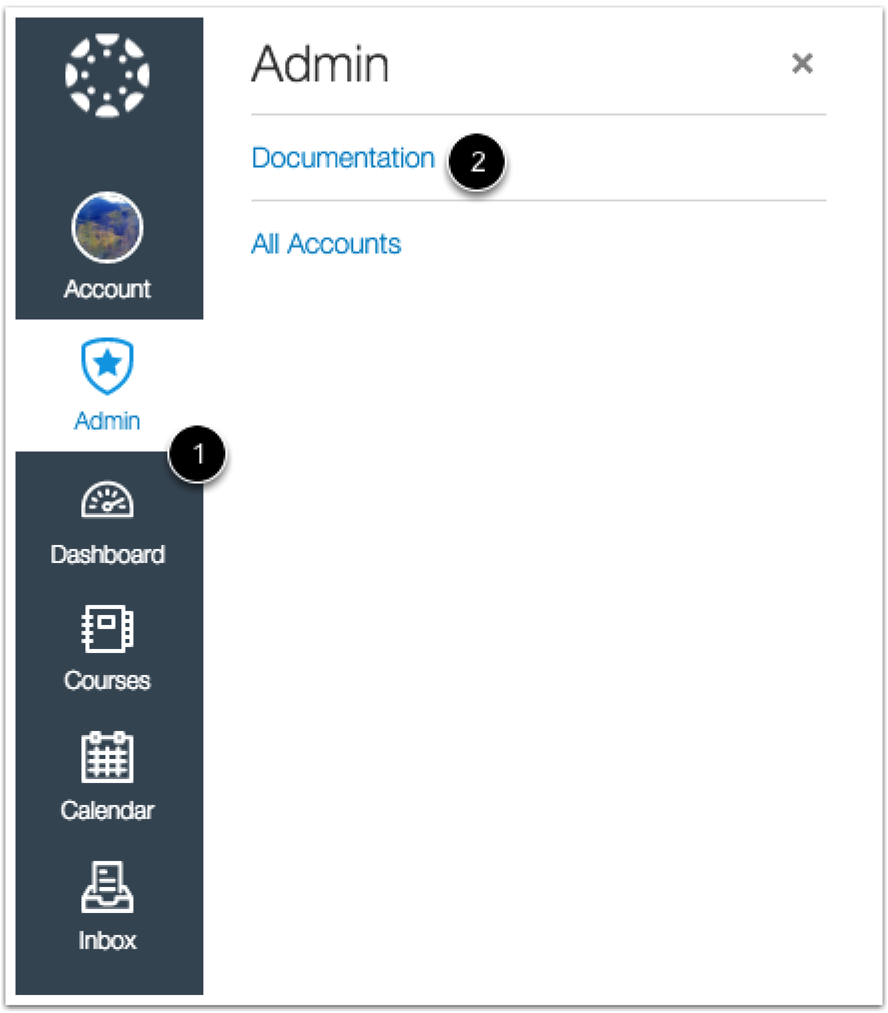
You can also use the drag and drop option to move outcomes and outcome groups. Click the outcome or outcome group and drag the outcome or outcome group to the desired location. Drop the outcome or outcome group in the desired location by releasing the mouse.

How do I find an existing outcome to add to an account or sub-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.

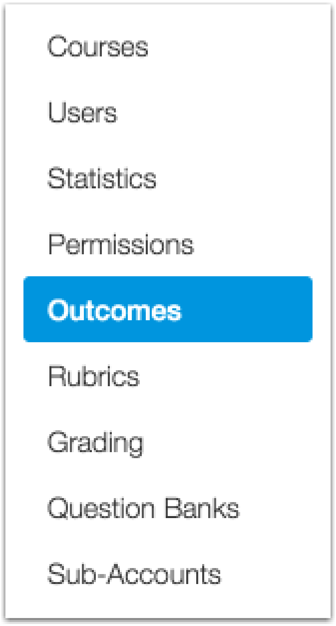
You can import an individual outcome or import an entire outcome group.

Open Account



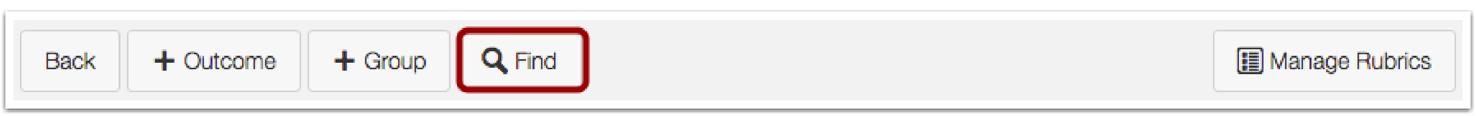
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



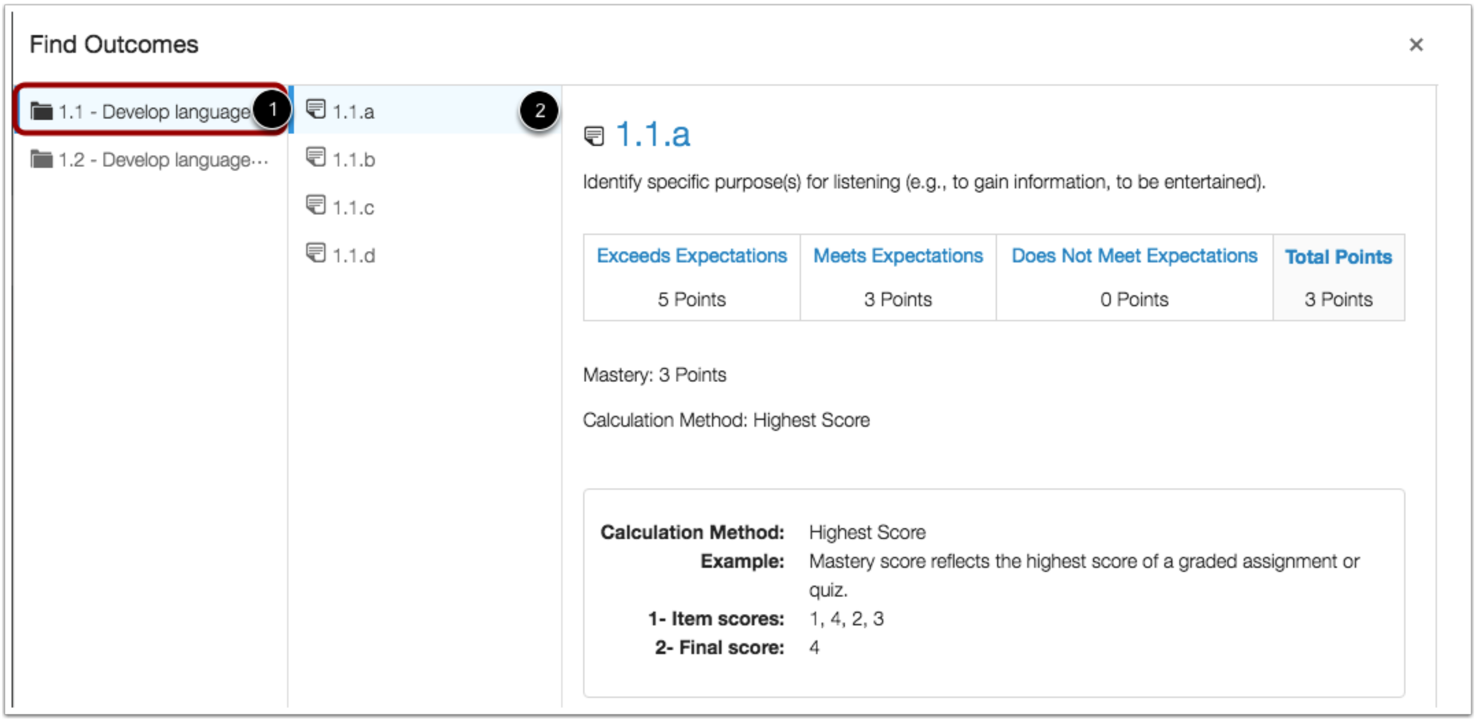
In Account or Sub-Account Navigation, click the **Outcomes** link.

Find Outcome



Click the **Find** button. You will find existing outcomes from Account, State or Common Core Standards.

Import Outcome

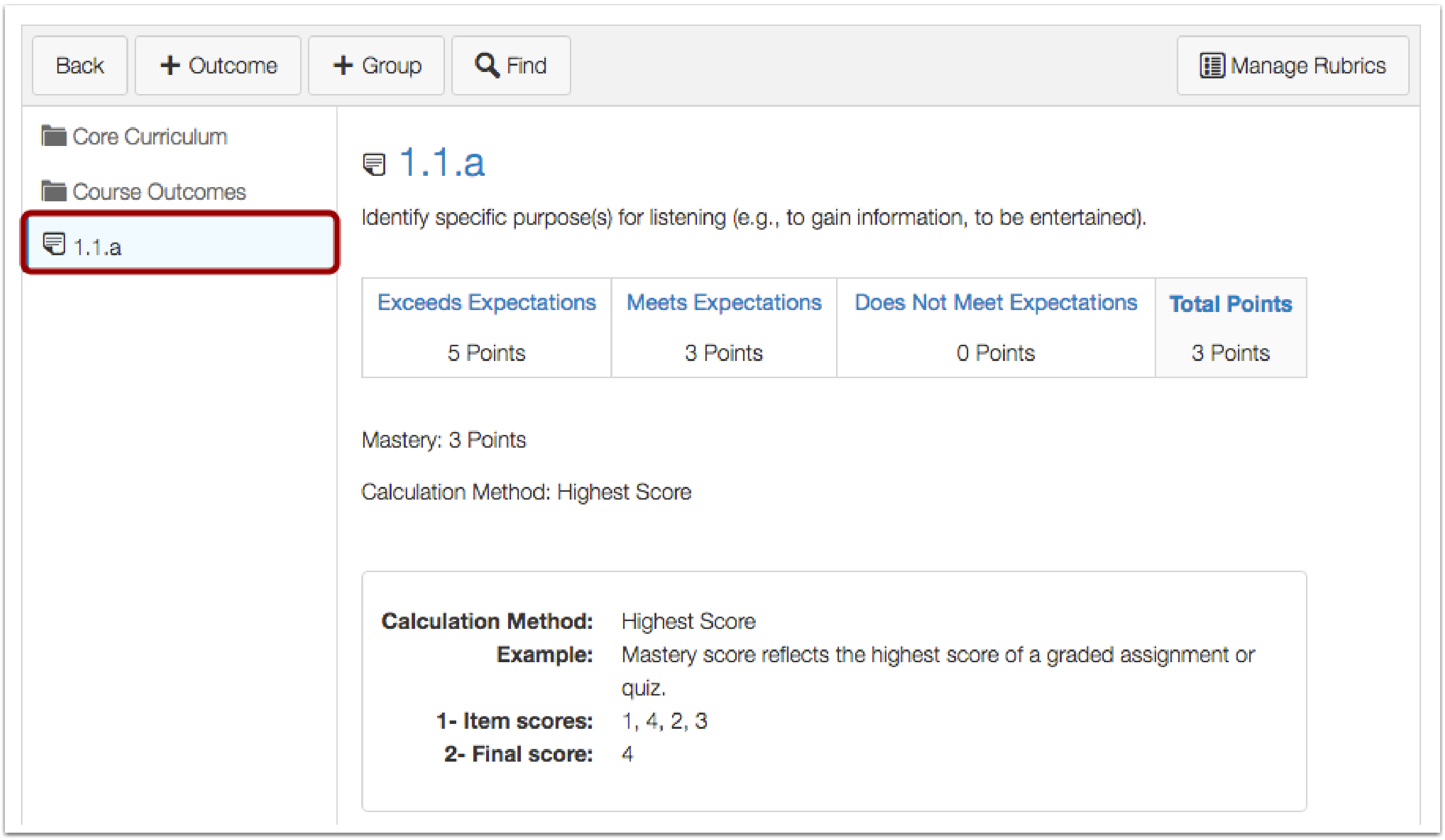


Select the name of an outcome group to view available outcomes [1]. You can also view outcome groups within other outcome groups.

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 Common Core State Standards to add to an account-level outcome?

State and Common Core Standards are goals 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.

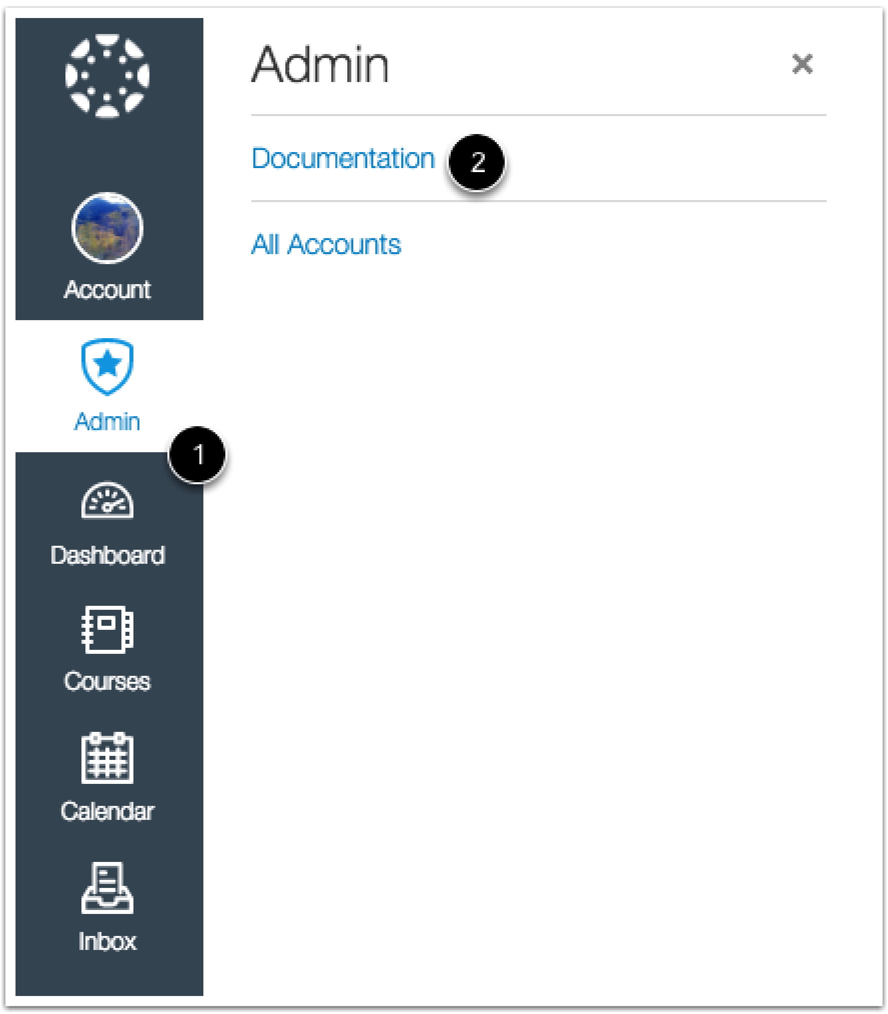
Canvas will import the following standards for free:

- 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

When State and Common Core Standards are imported into the account level, instructors who are finding standards for their course will view the State and Common Core Standards as part of the Account Standards outcome group.

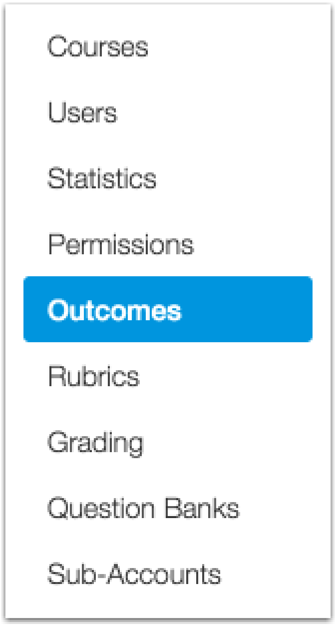
If your state does not appear in Outcomes or if your institution does not have access to Common Core or state standards, please contact your Customer Success Manager. Additionally, if you would like to purchase and use non-core standards for subjects such as PE, Health, Art, etc., please contact your Customer Success Manager.

Open Account



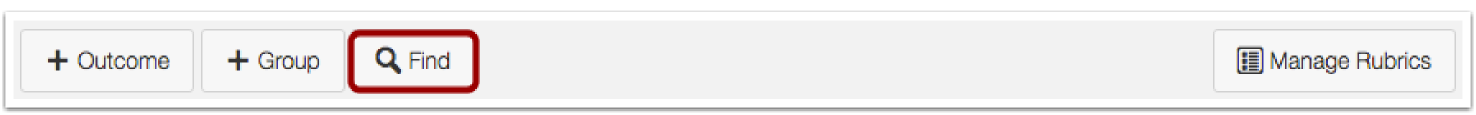
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



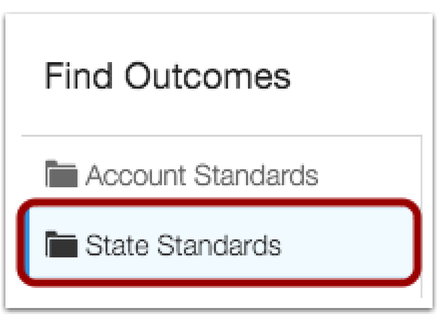
In Account or Sub-Account Navigation, click the **Outcomes** link.

Find Outcome



Click the **Find** button.

Select Outcome Type

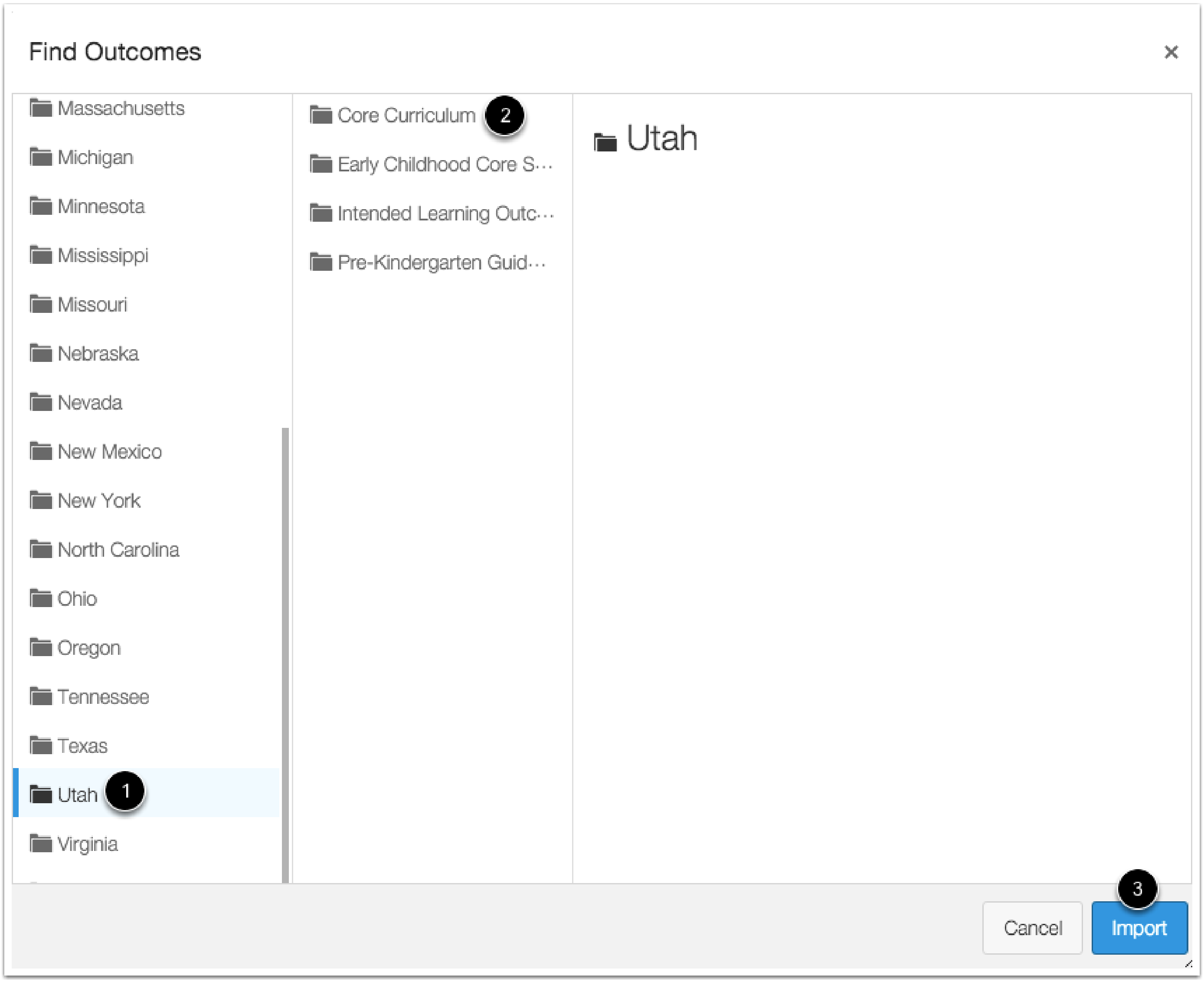


To view state standards, click the State Standards outcome group.

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.

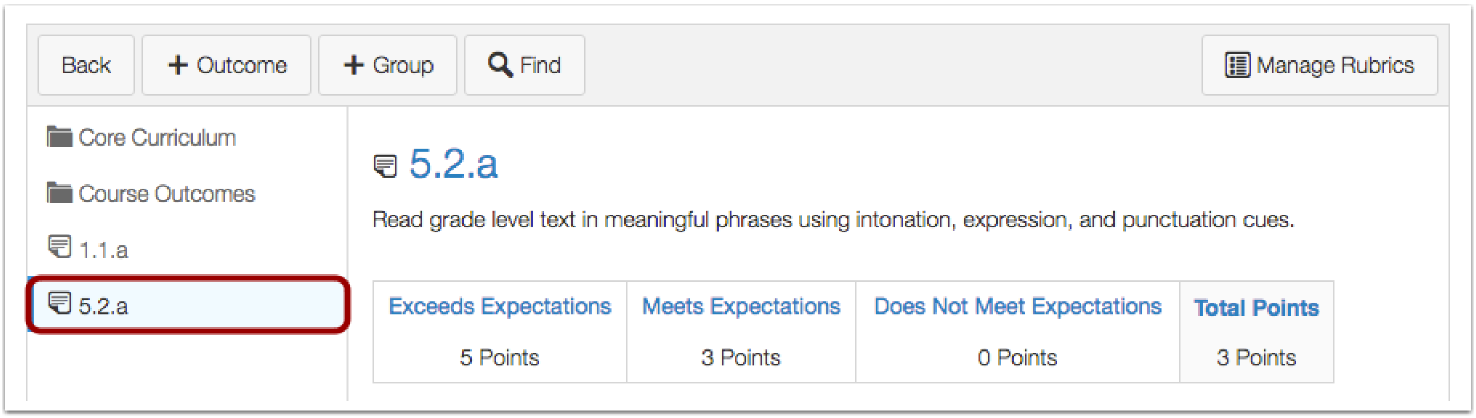
Choose Outcomes



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



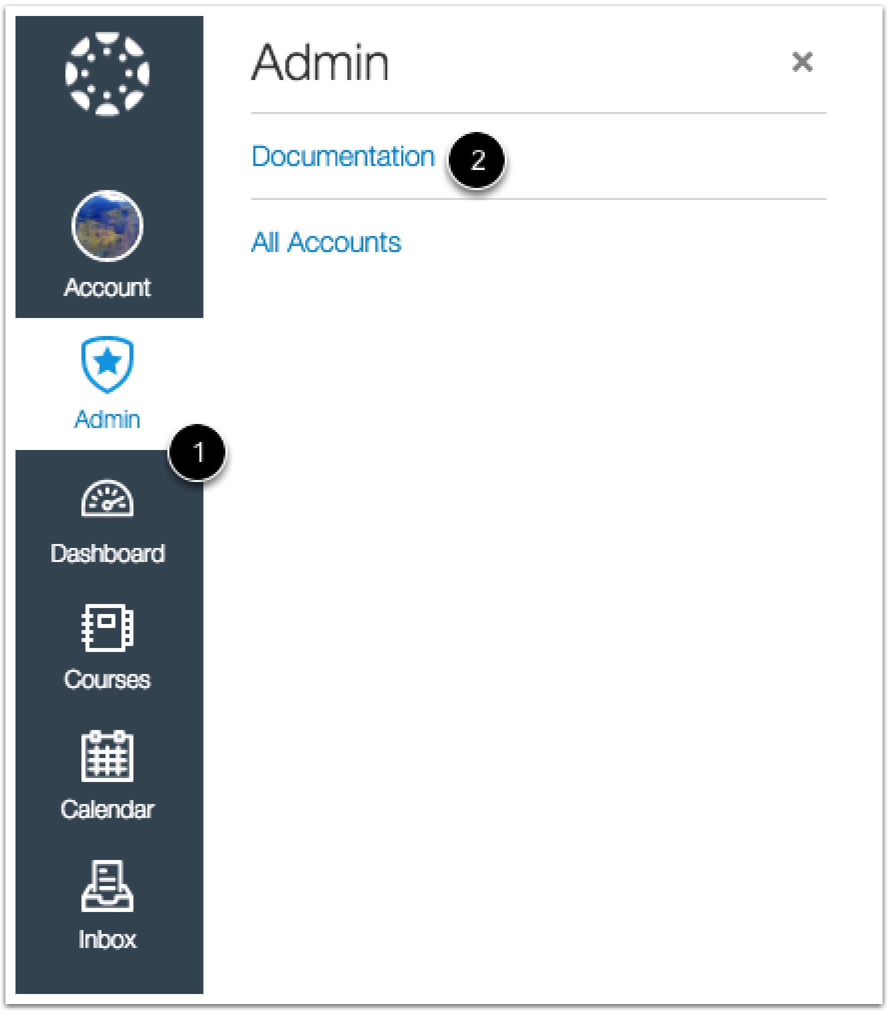
View the added Outcomes.

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?

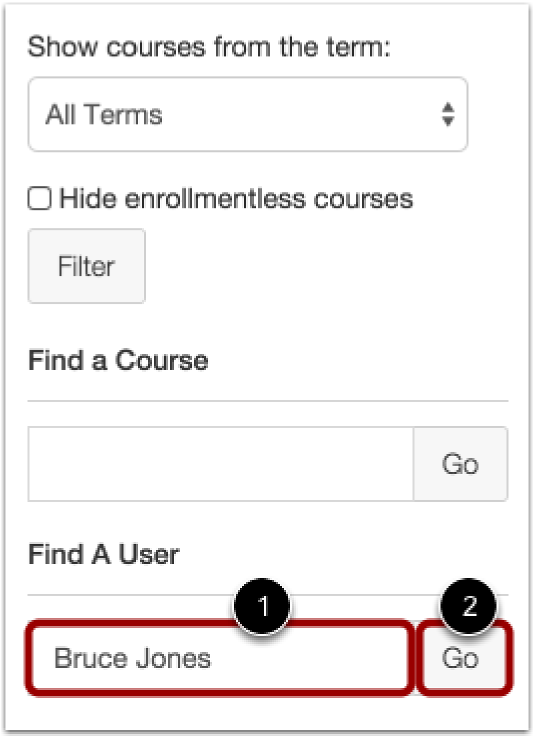
Outcome reports can be accessed by users with adequate permissions. This includes a teacher accessing Outcomes reports in a course or a user with adequate administrative permissions accessing reports in a sub-account.

Open Account



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

Search for User

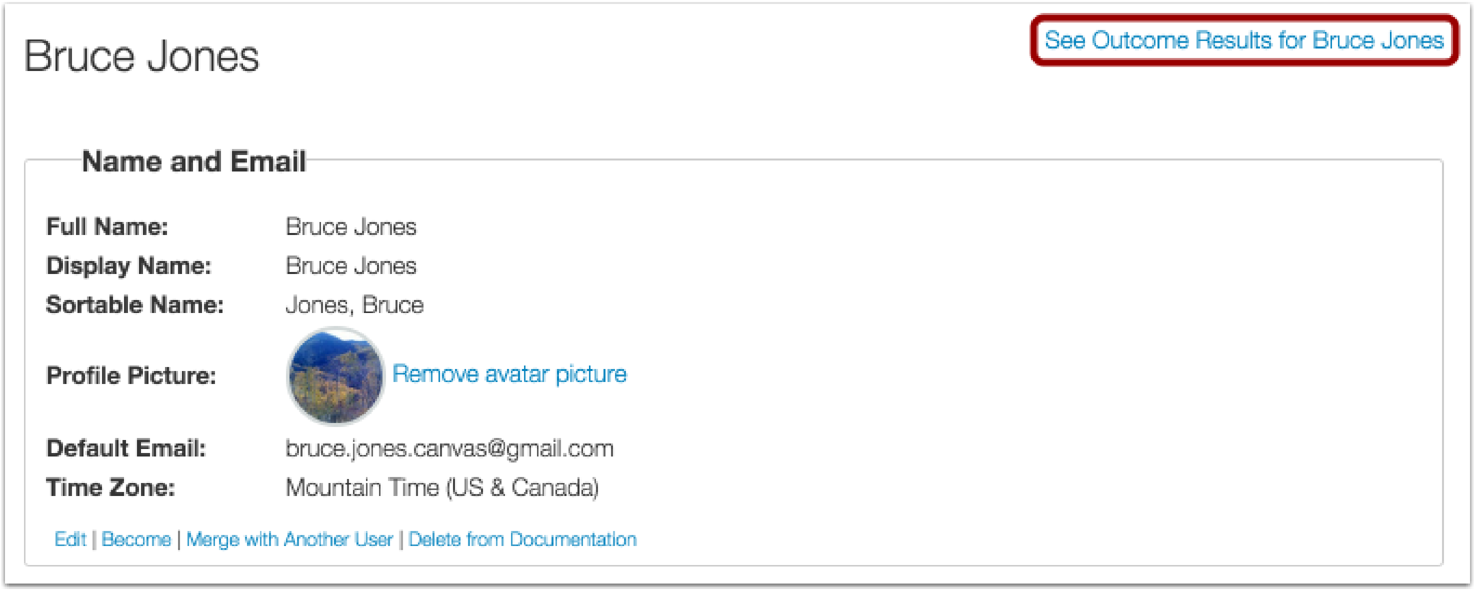


Type the name of the student in the find a user field [1]. Click the **Go** button [2].

Open User Account

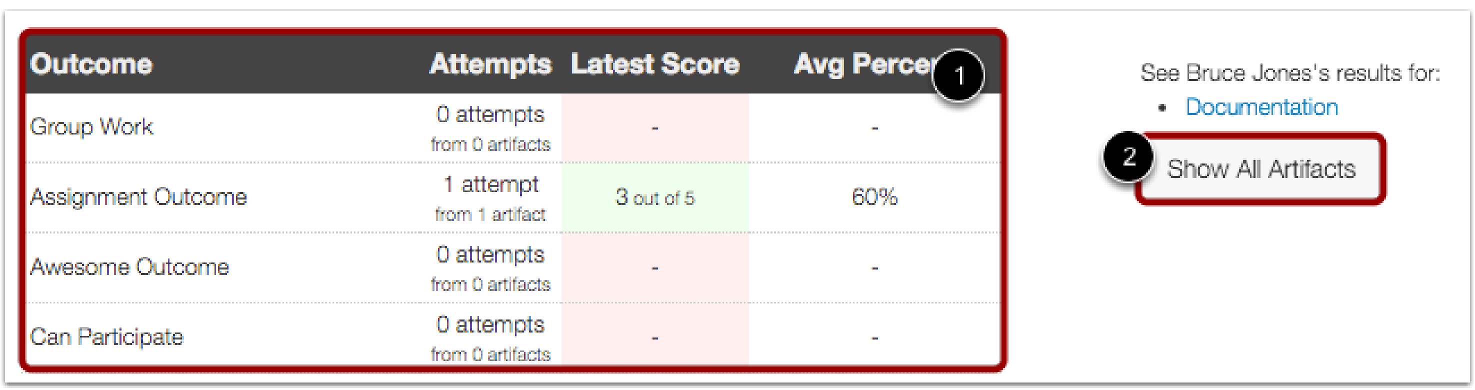
Click the student's name to view more details.

View User Details



Click the **See Outcome Results for [student name]** link.

View Outcomes Report



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.

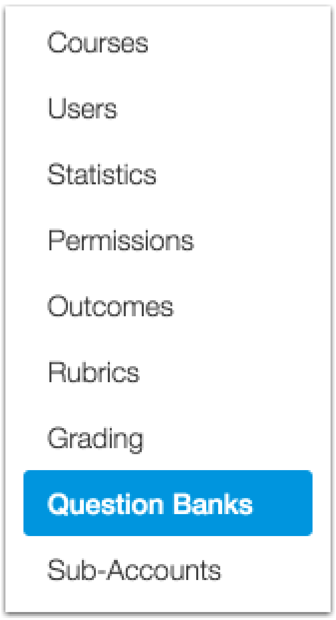
Question Banks

What are account-level question banks?

You can create account and sub-account level Question Banks in your Canvas instance. This allows anyone in the account to have access to the questions.

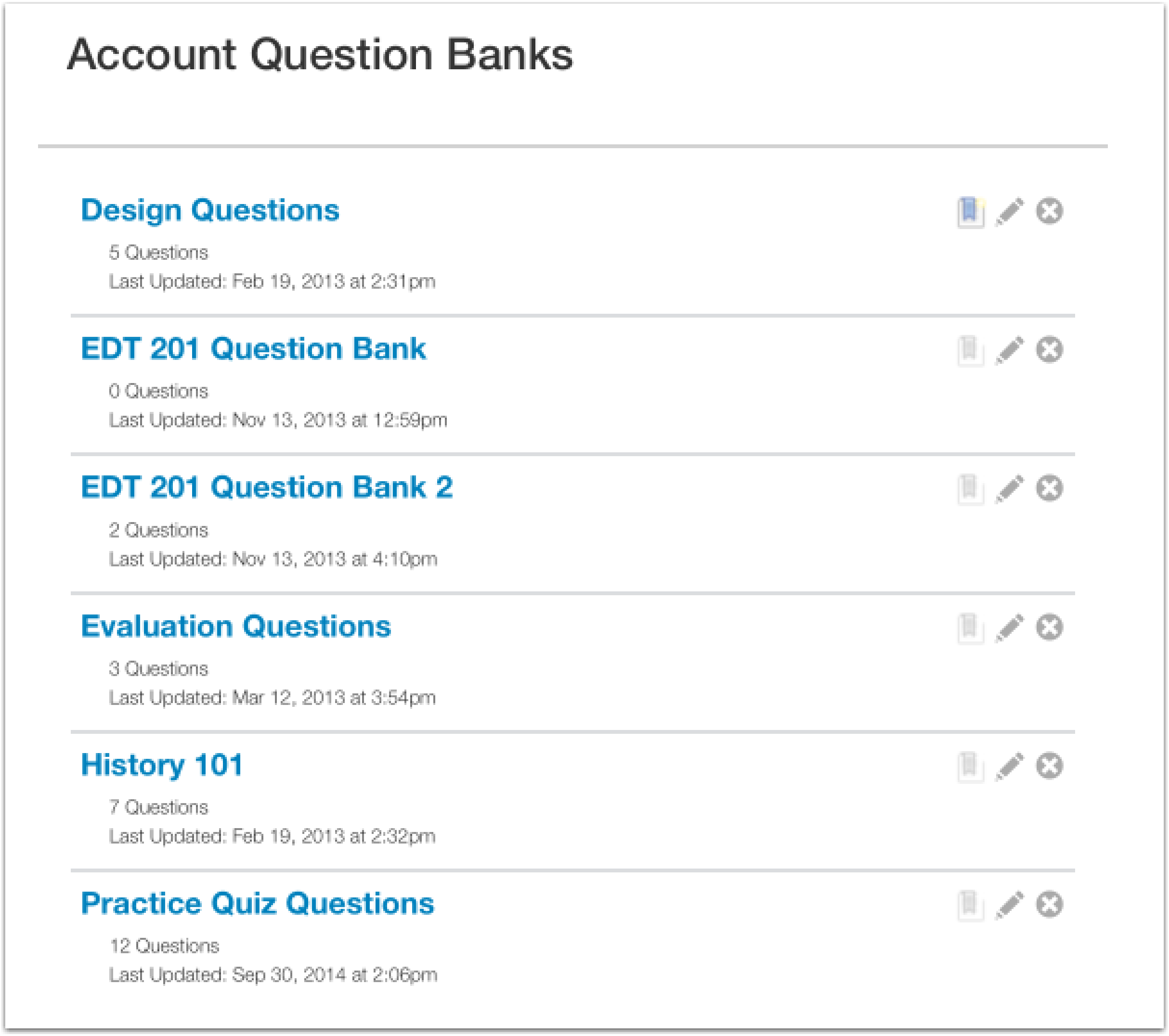
Click here to view a video about Question Banks.

Open Question Banks



Account-level question banks are question banks created and stored at the account level. This allows users to access and use general content for quizzes.

When Would I Use Account-Level Question Banks?

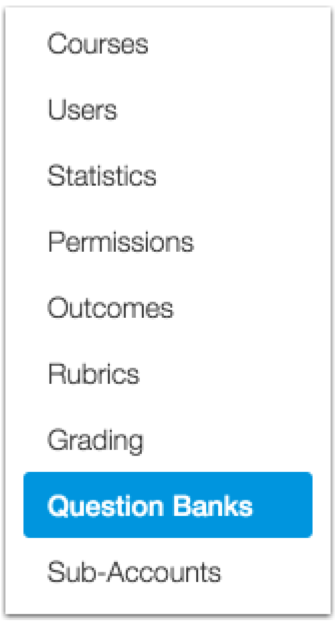


Account-level questions banks can be used to create institutional or departmental question repositories. For example, if the English department offers several courses to teach basic grammar rules to students, the department can create a sub-account level question bank. Instructors can then access the question banks to offer the same evaluation to students in different courses.

How do I create a question bank in an account?

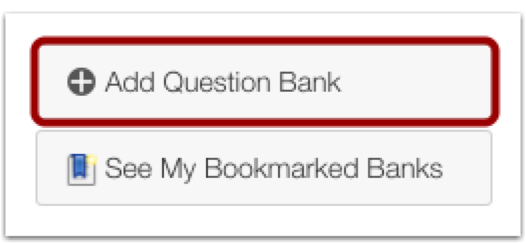
You can create Question Banks at the account-level.

Open Question Banks



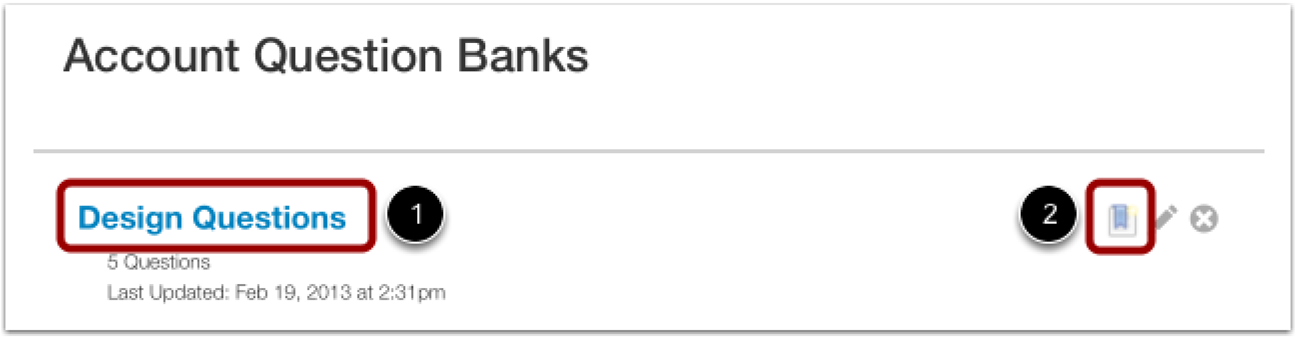
In Account Navigation, click the **Question Banks** link.

Add Question Bank



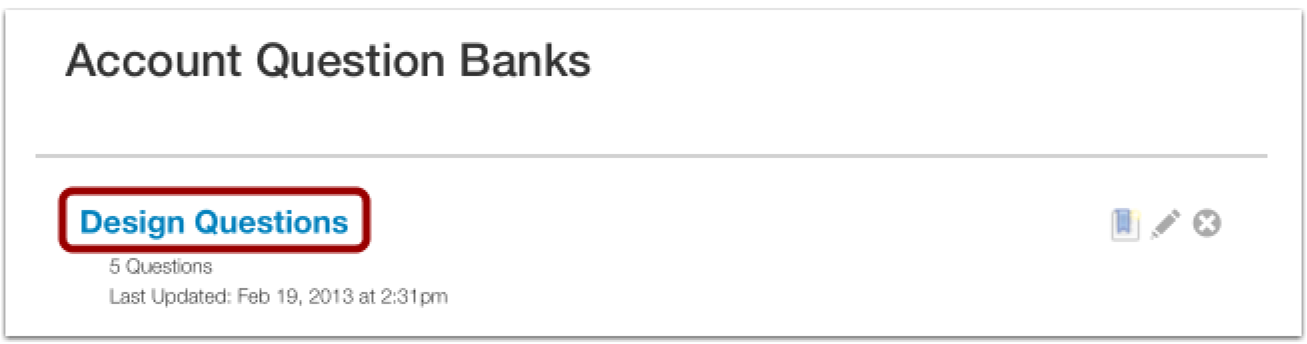
Click the **Add Question Bank** button.

Edit Bank Details



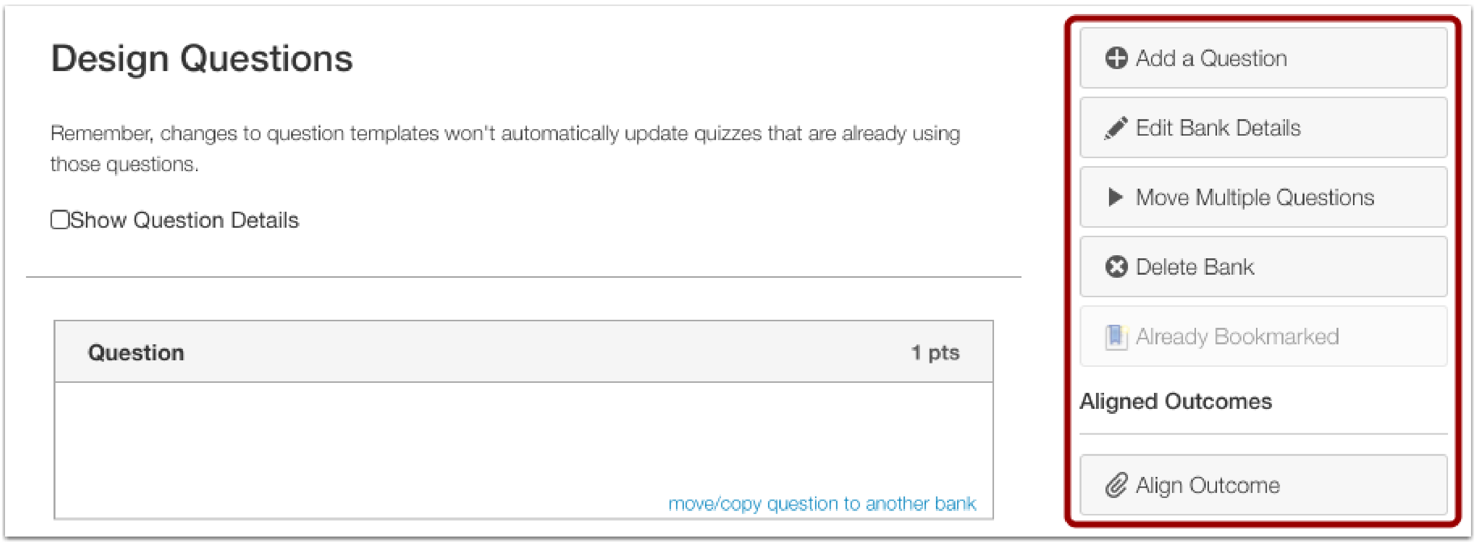
Type the name of the question bank in the **Bank Name** field [1]. Click the **Bookmark** icon to bookmark the question bank [2]. Press **Return** (on a MAC keyboard) or **Enter** (on a PC keyboard) to create the question bank.

Open Question Bank



Click the title of the question bank to open the bank of questions.

Add Content to Question Bank

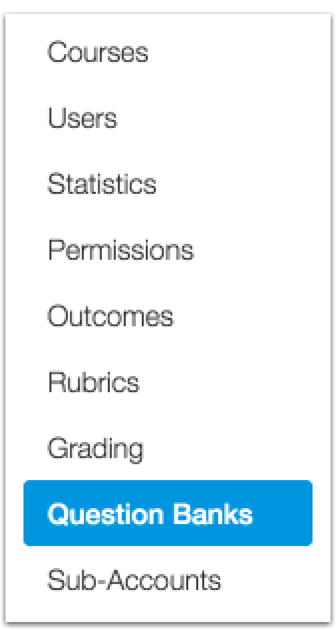


Use the tools in the sidebar to add content to the question bank.

How do I bookmark a question bank in an account?

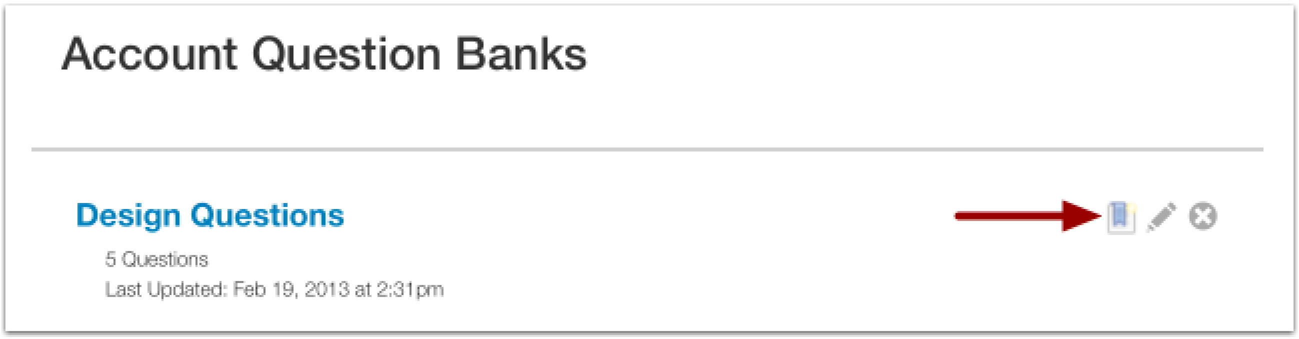
Bookmarking allows users to quickly identify favorite or frequently used Question Banks.

Open Question Banks



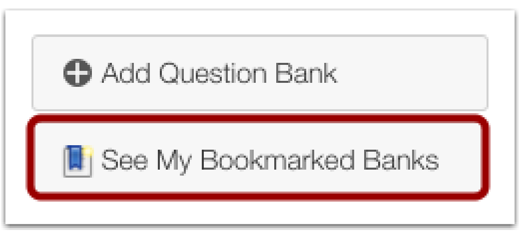
In Account Navigation, click the **Question Banks** link.

Bookmark Question Bank



Click the **Bookmark** icon. Question banks that are already bookmarked show an opaque Bookmark icon.

View Bookmarked Banks

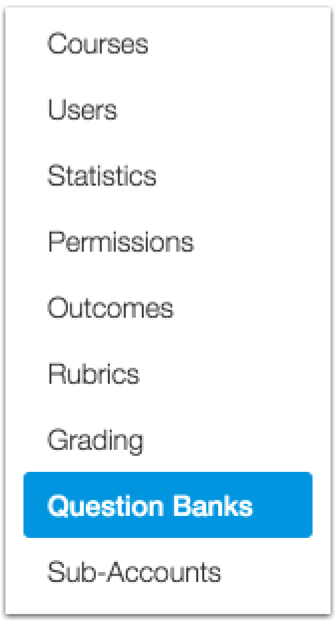


Click the **See My Bookmarked Banks** button to view all of your bookmarked banks.

How do I delete a question bank in an account?

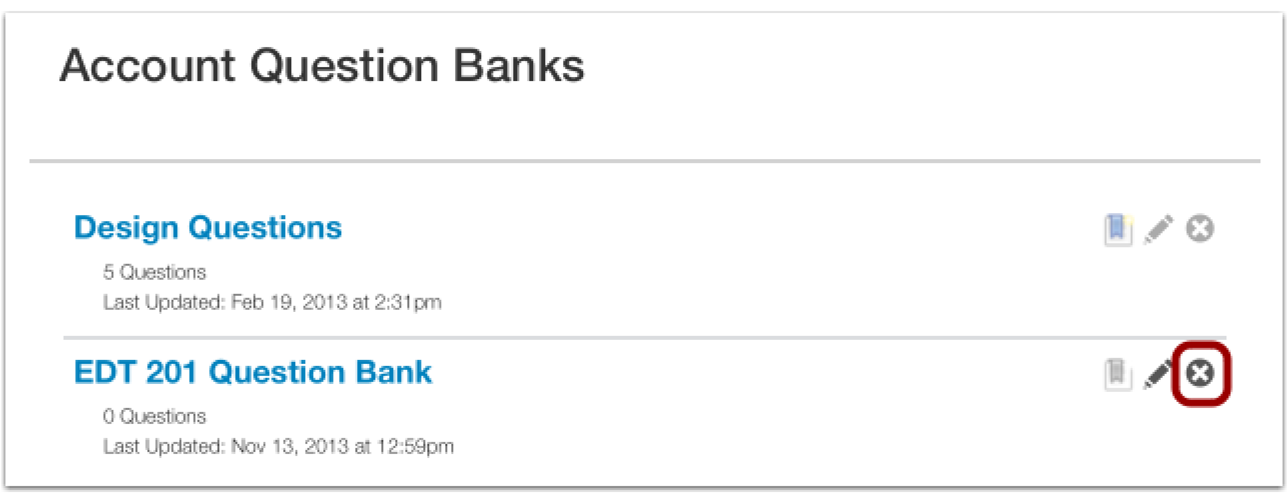
You can delete Question Banks at the account level in Canvas.

Open Question Banks



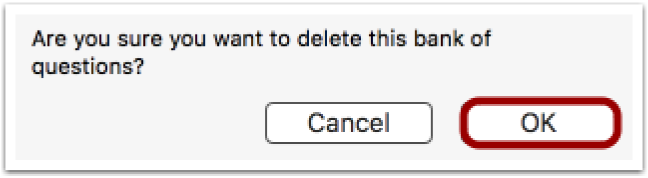
In Account Navigation, click the **Question Banks** link.

Delete Question Bank



Click the **Delete** icon to delete the question bank.

Confirm Deletion



Click the **OK** button to delete the question bank.

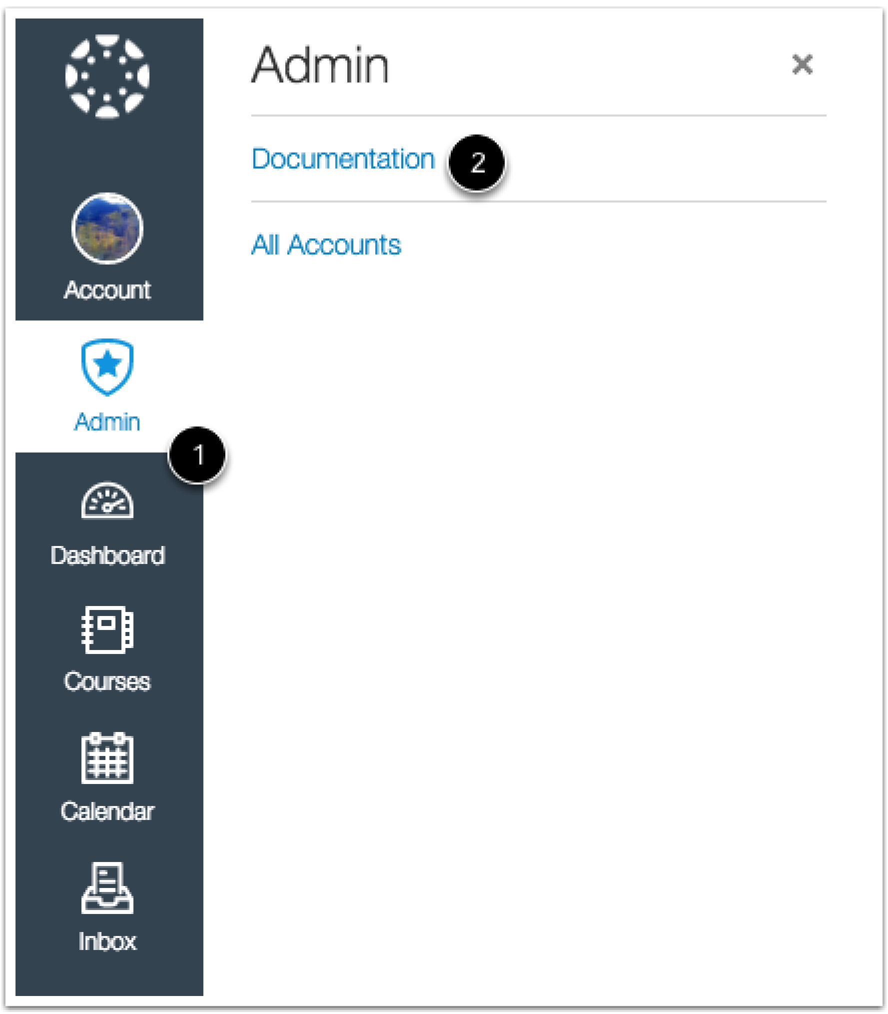
Reports and Statistics

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.

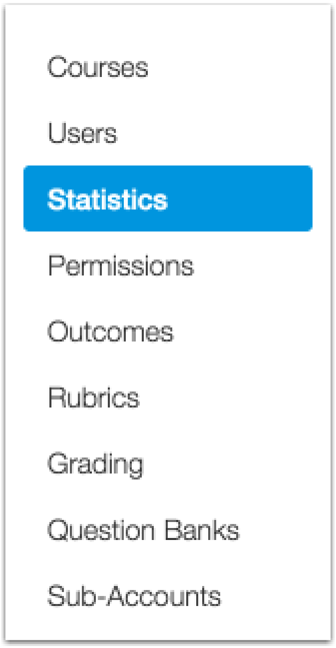
View a video about Analytics and Statistics.

Open Account



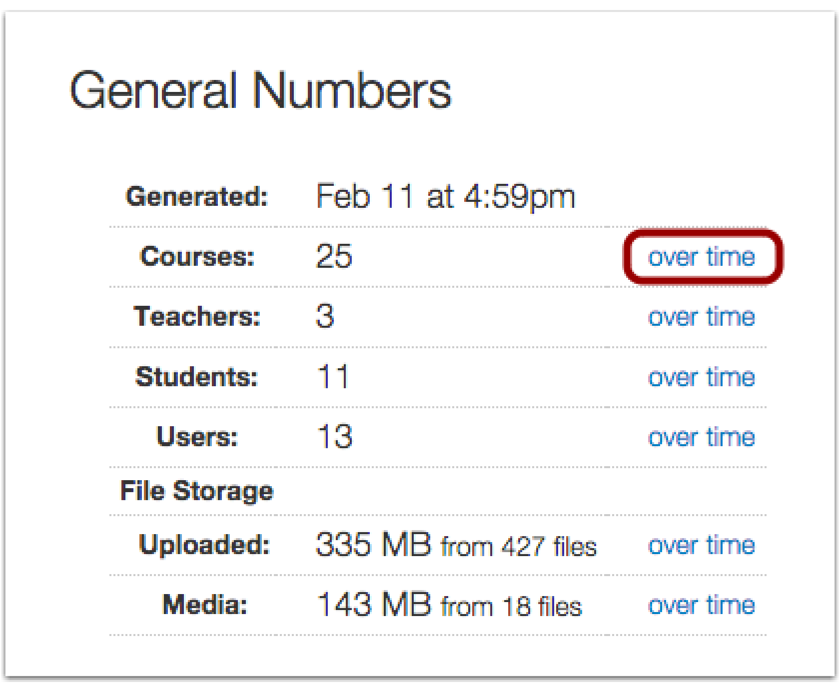
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Statistics



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

View General Numbers

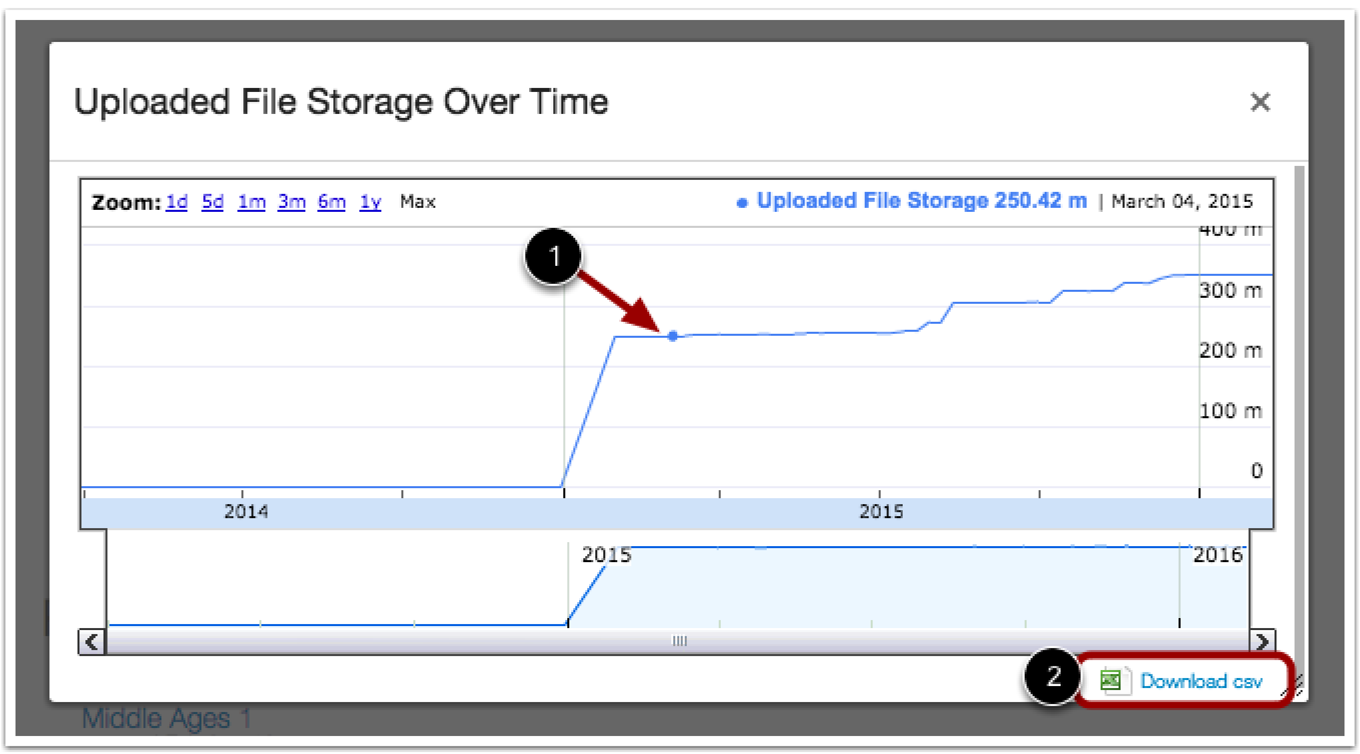


In the Statistics page, you can view general information about your account.

- **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 24 hours. This number does not include Student View.
- **Uploaded File Storage** indicates the amount of files stored and the number of files uploaded to the account. Deleted files are not included.
- **Media File Storage** indicates the amount of files stored and the number of media objects uploaded to active courses, such as video, audio and music files.

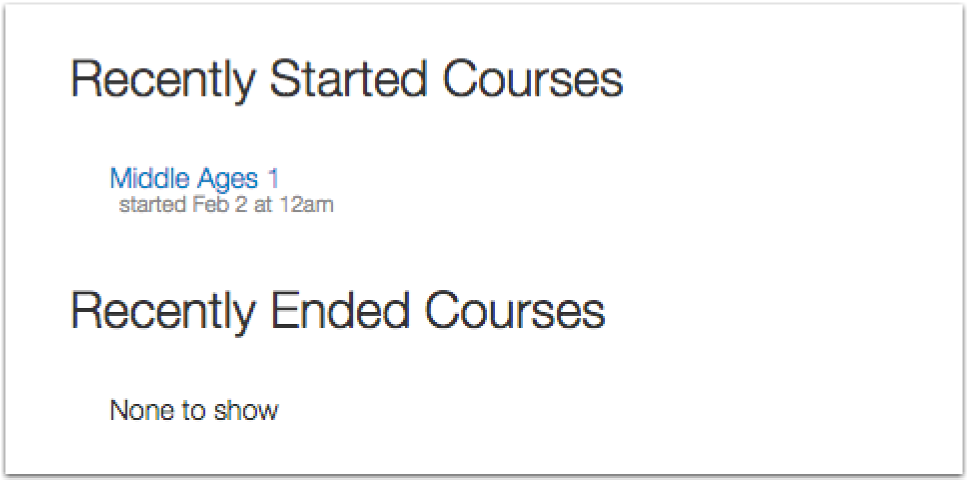
General numbers show the current statistics in the course; to view how a statistic has evolved over time, click the **over time** link.

View Statistics Over Time



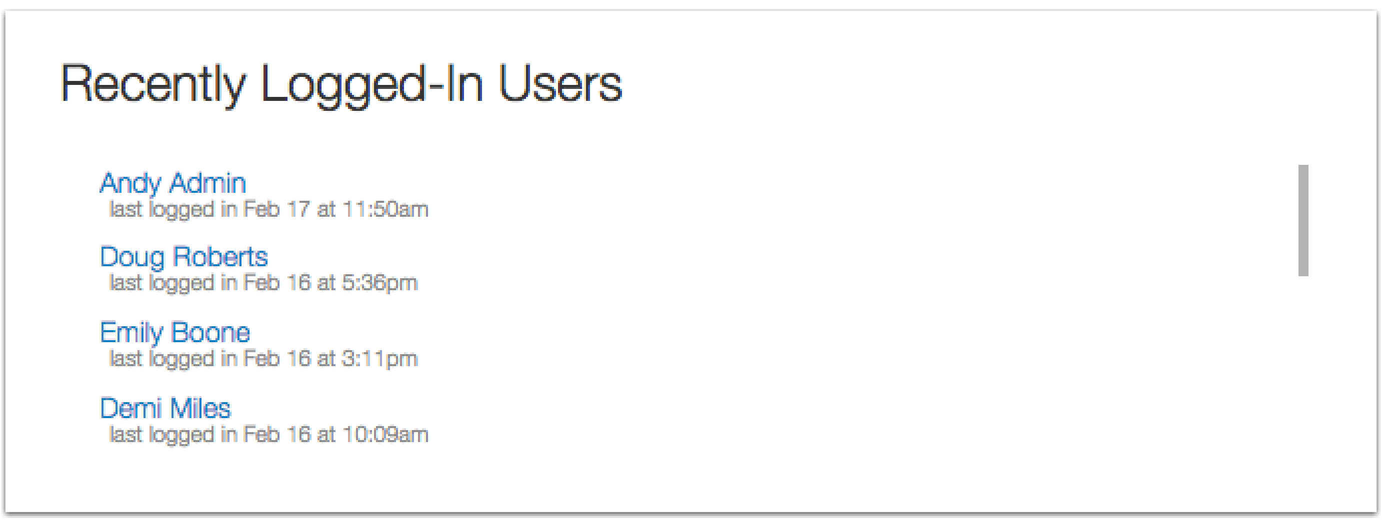
The statistics over time graphs show how specific data has evolved since your account was created. You can move your cursor over the data graph to view data for a specific date [1]. You can also download the data by clicking the **Download CSV** link [2].

View Course Statistics



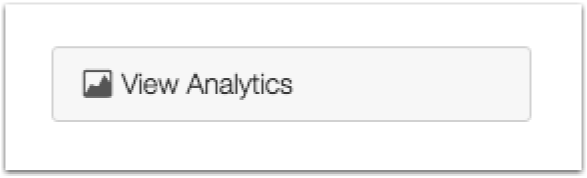
You can view recently started courses [1] and recently ended courses [2] in your account. To view a course, click the name of the course.

View Users



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

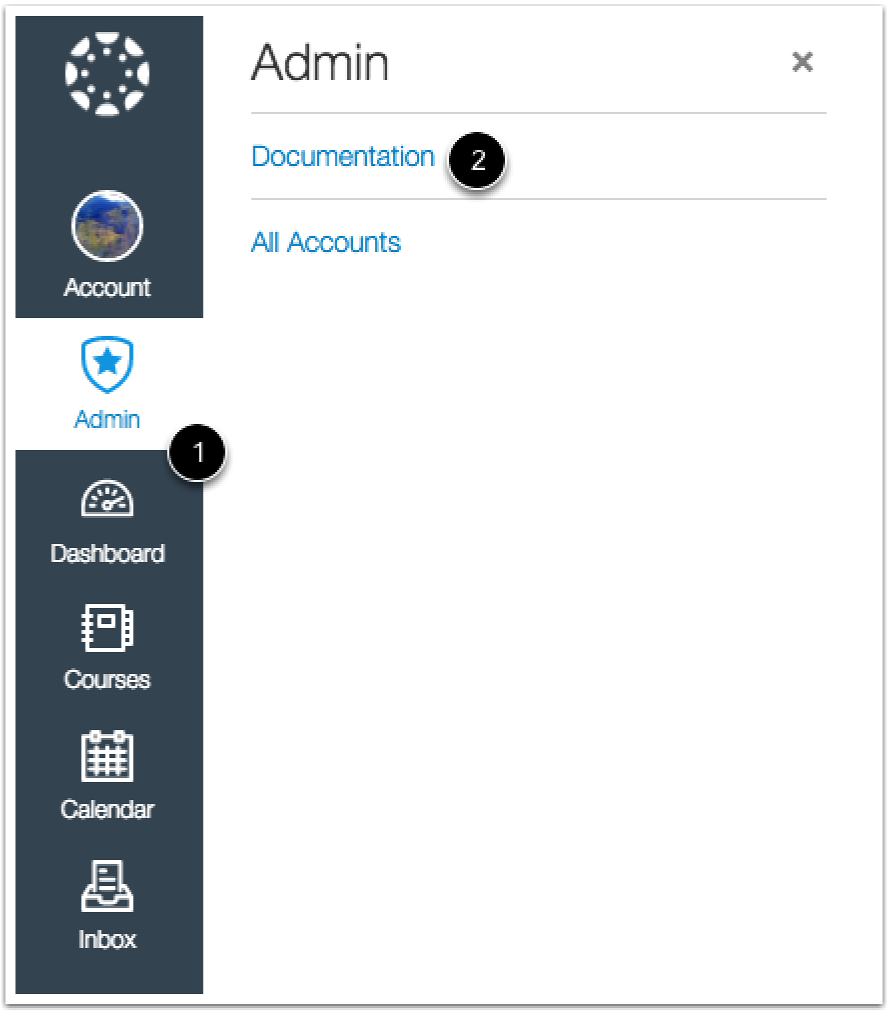


To view account analytics, click the **Analytics** button.

How do I view reports for an account?

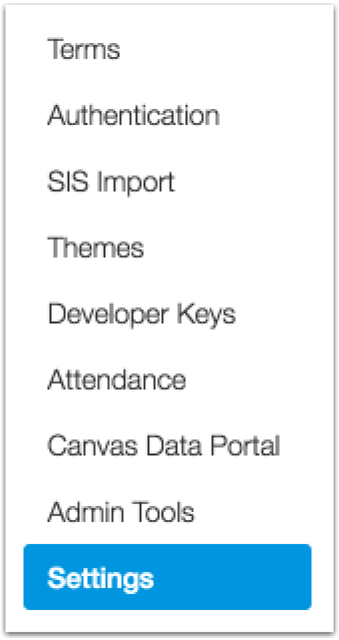
Account-level admins have access to Canvas reports that can be used to review account data. Canvas includes a set of default reports, though other customized reports may be included for your institution. Learn about report configurations in the Canvas Default Account Reports PDF.

Open Account



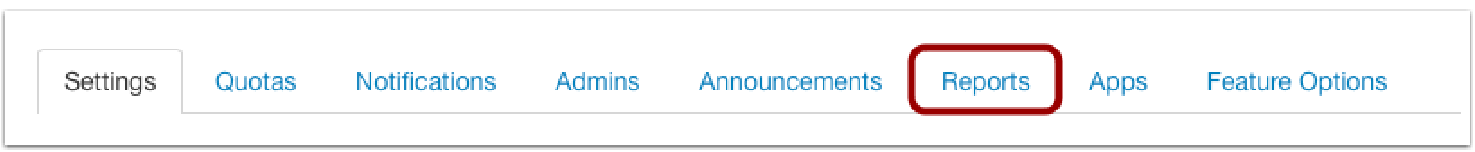
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Settings



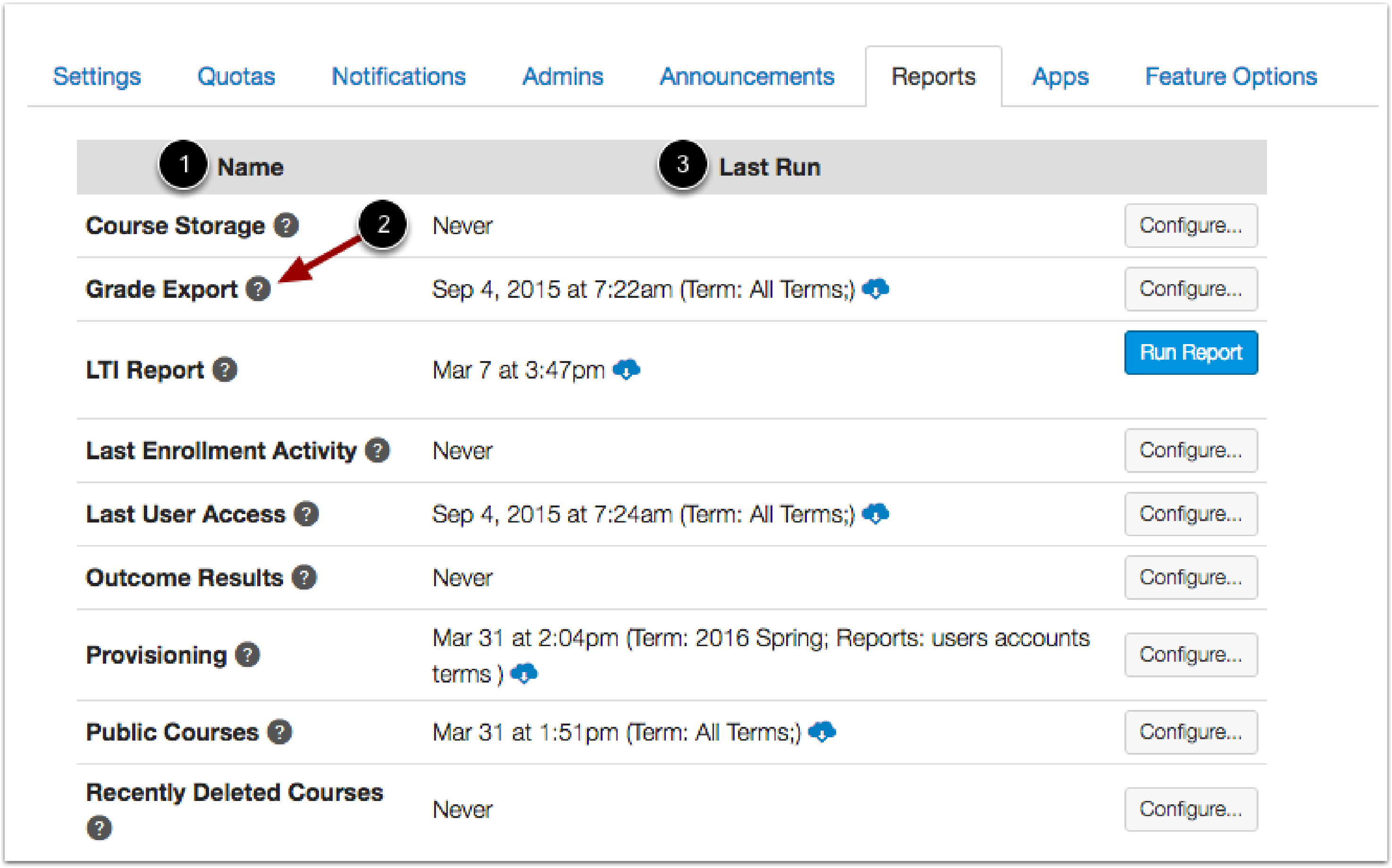
In Account Navigation, click the **Settings** link.

Open Reports



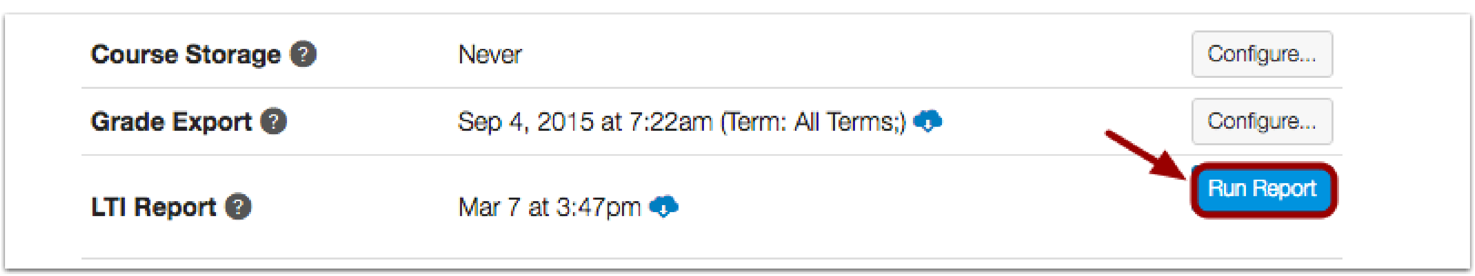
Click the **Reports** tab.

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].

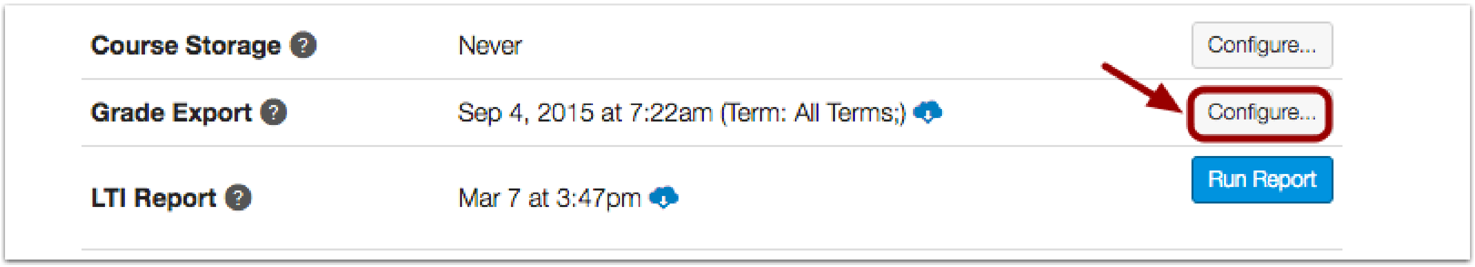
Run Report



To run a report that does not need to be configured, click the **Run Report** button.

The report will send you an email when completed.

Configure Reports



The majority of reports must be configured before they can be run. To configure a report, click the **Configure** button.

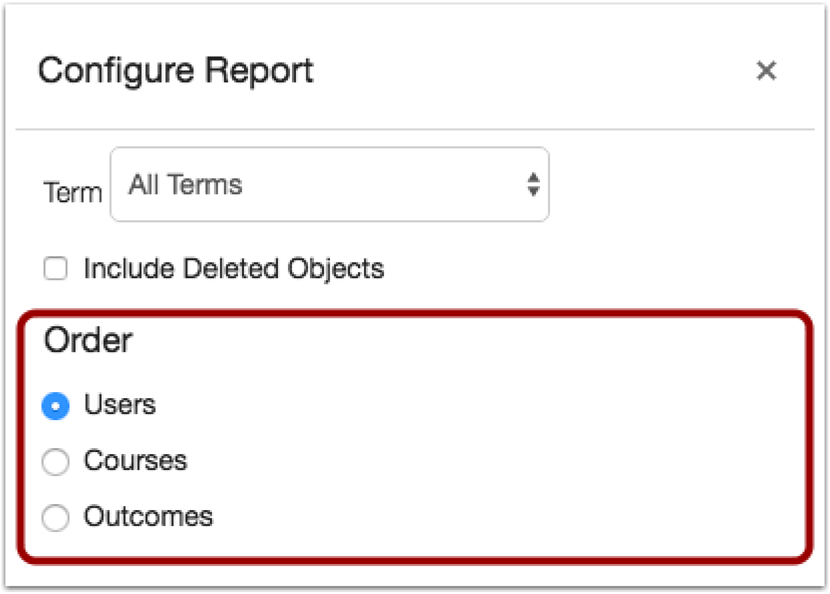
Depending on the report, report configurations may include one or several options.

Select Terms

All reports require you to select a term. In the **Terms** drop-down menu [1], you can choose between All Terms, Default Term, or any other term that is created for the account. Courses with muted assignments may not accurately reflect scores in this report.

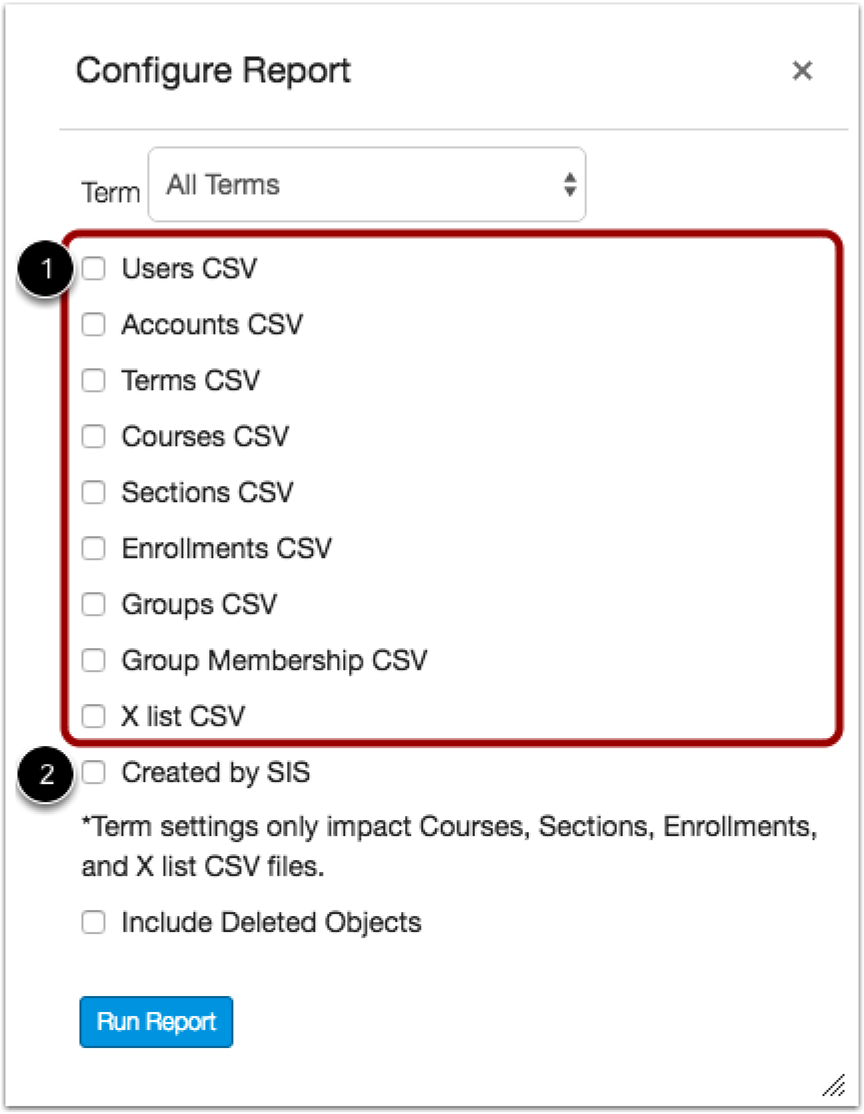
The Grade Export, Last User Access, and Student Competency reports include the option to include deleted objects in the term. Deleted objects may include deleted courses, users, or enrollments. To include deleted objects, click the **Include Deleted Objects** checkbox [2].

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

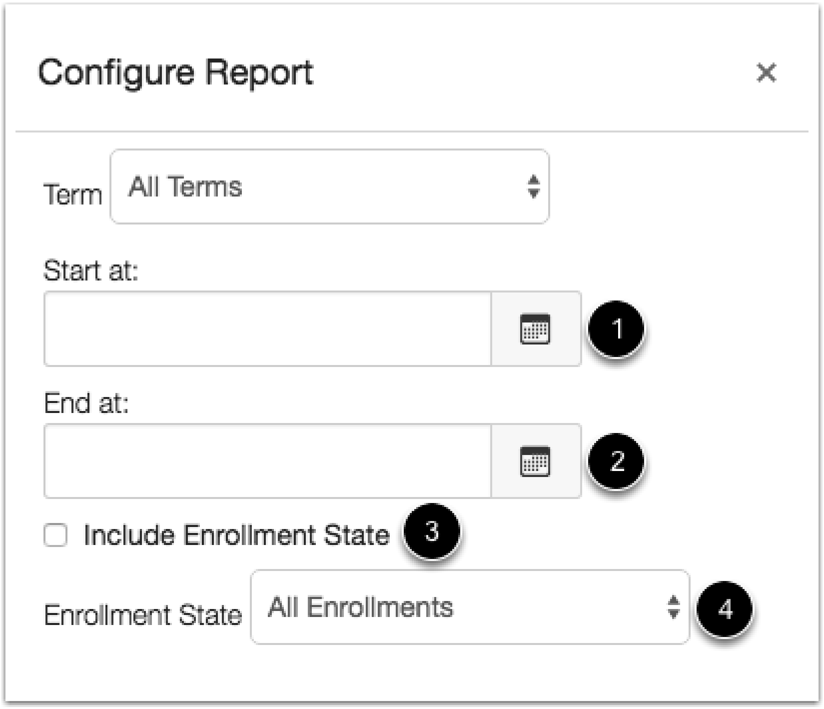


The Provisioning and SIS Export reports ask you to select the CSV files you want to generate for a selected term [1]. Select the checkboxes next to the files you want to generate. Files can be generated for Users, Accounts, Terms, Courses, Sections, Enrollments, Groups, Group memberships, and Cross-listing (X list). 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.

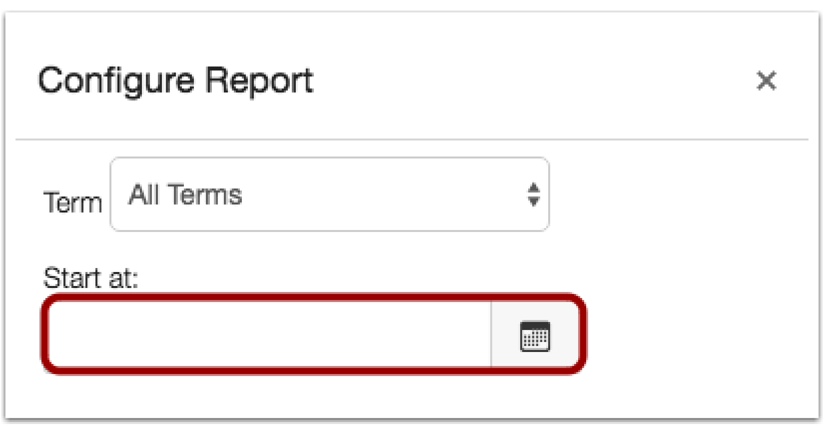
Select Dates and Enrollment State



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.

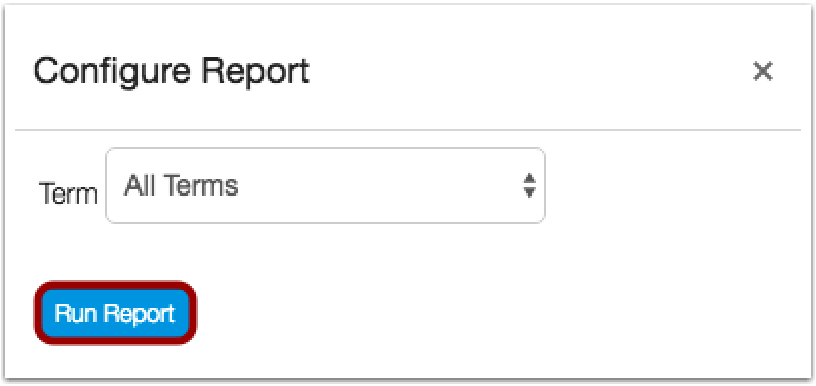
You may also choose to include the enrollment state in the report by clicking the **Include Enrollment State** checkbox [3]. In the Enrollment State drop-down menu [4], select all enrollments or only active enrollments.

Select Start Date



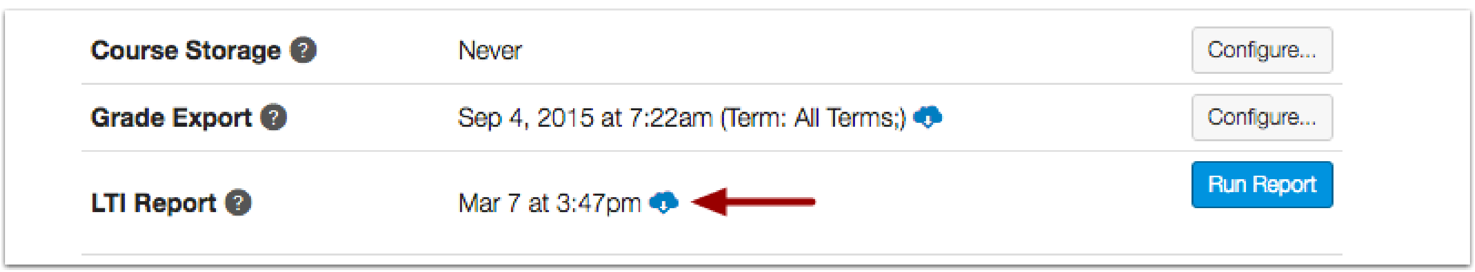
The Zero Activity report asks you to select a start date for the report. You can either select a date by clicking the calendar icon, or you can enter the date directly in the date field.

Run Report



When you have finished configuring a report, click the **Run Report** button.

Download Report



When a report is complete and is available for download, click the **Download** icon. The file will download to your computer.

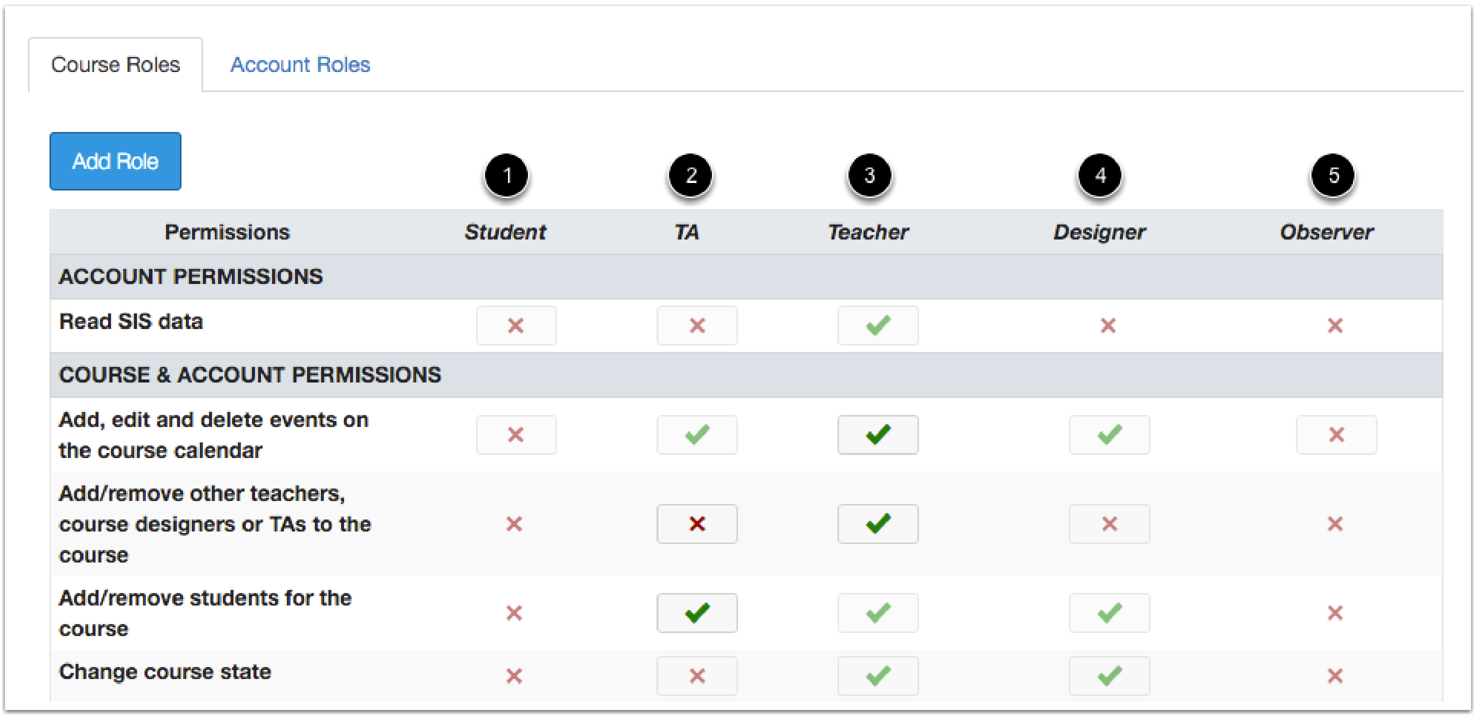
Roles and Permissions

What are the differences between course-level roles and account-level roles?

Course-level roles include users with permissions in the course. Account-level roles include permissions that affect the entire account as well as courses. Learn how course-role and account-role permissions work in Canvas.

View a video about Permissions.

Course-Level Roles



Permissions	Student	TA	Teacher	Designer	Observer
ACCOUNT PERMISSIONS					
Read SIS data	✗	✗	✓	✗	✗
COURSE & ACCOUNT PERMISSIONS					
Add, edit and delete events on the course calendar	✗	✓	✓	✓	✗
Add/remove other teachers, course designers or TAs to the course	✗	✗	✓	✗	✗
Add/remove students for the course	✗	✓	✓	✓	✗
Change course state	✗	✗	✓	✓	✗

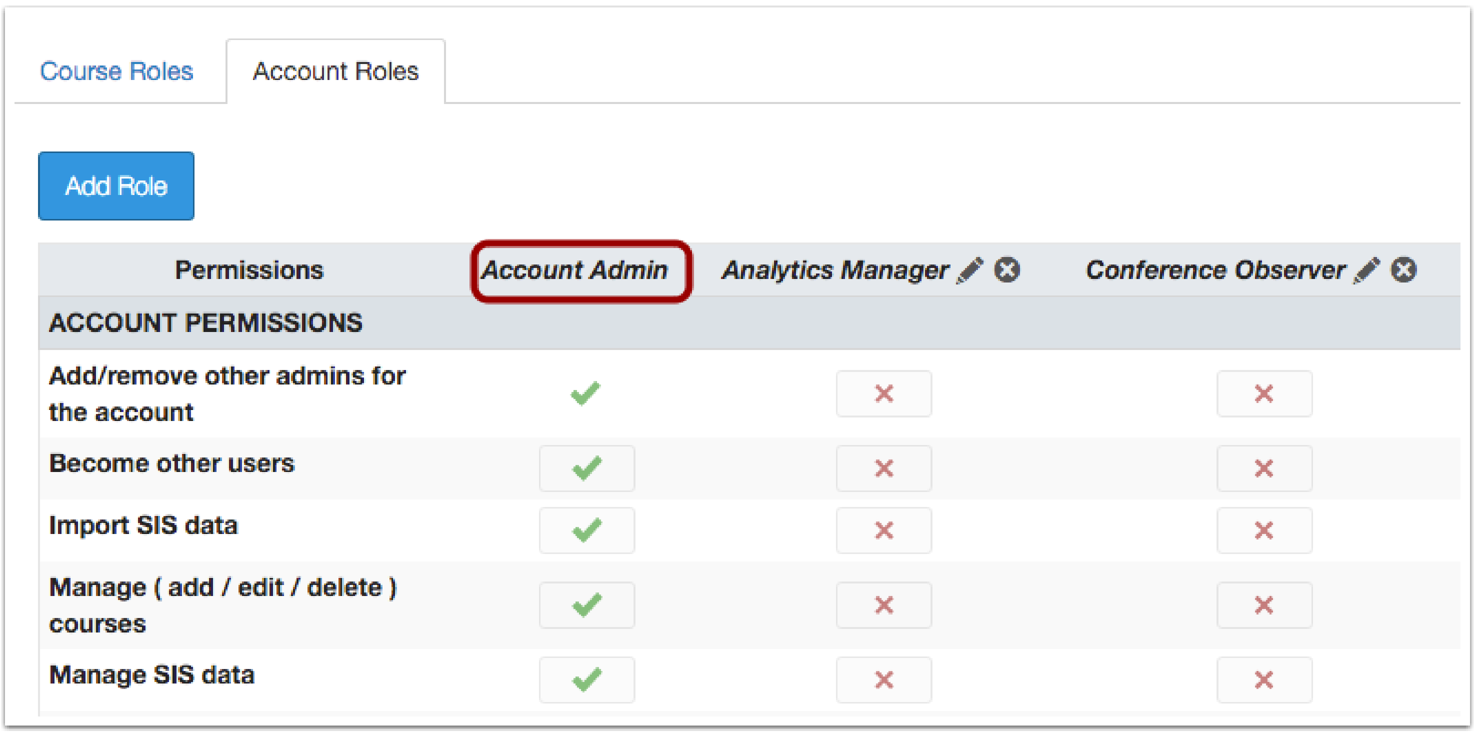
Course-level roles are roles with permissions set at the course level. Usually these roles cannot see more than what is in the course.

Canvas provides five base roles that each include a set of default permissions. You can change the permissions according to the access you want to grant users in each role. You can also create custom course roles that are created from a base role:

1. Students [1] have the ability to submit assignments and that should never be taken away from them. Students have some restricted permissions, but they have enough permissions to use Canvas. Sometimes students may have other permissions bestowed upon them, if the an admin gives them more permissions.
2. TAs [2] are very similar to teachers in the sense of permissions, except TAs should not have access to SIS data. TAs are meant to help the teacher and provide support. Admins can grant certain permissions to TAs, like grading, or not allow the TA to grade. It depends on the institution and what the needs are.
3. Depending on the institution, teachers [3] can have almost account-level permissions, or very little permissions. Teachers are basically course admins and have control over the course. However, like all the roles, they can be used as a different type of user, if needs be.

4. Designers [4] should have access to at least using the course content, creating discussions, announcements, assignments, quizzes, and other content filled features. Some designers will have more or less permissions than teachers when it comes to student information. Designers cannot access grades. However, if your institution does not use Course Designers, you could use this user role as another TA user role that has more permissions than the regular TA.
5. Observers [5] can be linked to a student enrolled in a course. For example, parents, guardians, and/or mentors may wish to be linked to a student to view the student's progress in the course. Usually observers have the least amount of permissions.

Account-Level Roles



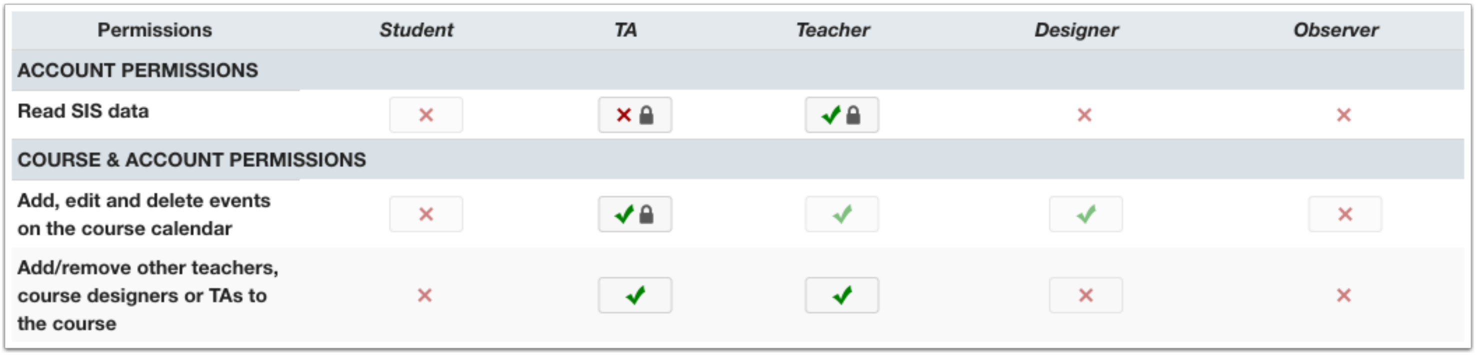
Account admins have the power to set permissions for all users in Canvas. Admins can [create additional account-level roles](#) with various permissions at the account level. The default permissions for account admins can include access to everything within the account, plus the ability to masquerade 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 be admins for the sub-accounts to which they've been assigned. Sub-account admins will most likely receive the same permissions as account admins, but they will only have power over the sub-account assigned to them. The default permissions for a sub-account admin will vary between accounts.

What do the icons in the Permissions page in an account or sub-account represent?

This lesson explains the available permissions icons for accounts or sub-accounts in Canvas. If you need help customizing your account-level roles, please contact your Customer Success Manager.

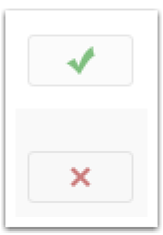
View Permissions



Permissions	*Student*	*TA*	*Teacher*	*Designer*	*Observer*
ACCOUNT PERMISSIONS					
Read SIS data	✗	✗ 🔒	✓ 🔒	✗	✗
COURSE & ACCOUNT PERMISSIONS					
Add, edit and delete events on the course calendar	✗	✓ 🔒	✓	✓	✗
Add/remove other teachers, course designers or TAs to the course	✗	✓	✓	✗	✗

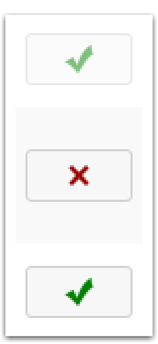
On the permissions page, you can see locked default, default, and editable permissions.

View Default Permissions



Default permissions are indicated by transparent green checkmark button or red X button. The green checkmark represents a permission that is enabled by default, while the red X represents a permission that is disabled by default.

Override Default Permissions

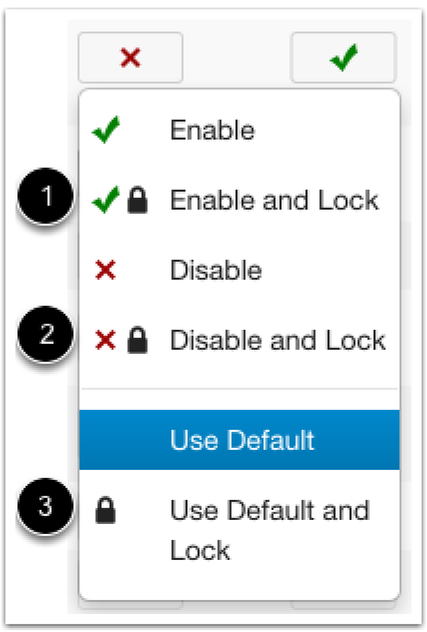


By clicking the transparent green checkmark or red X button, you can override the default to enable or disable the permission. The transparent green checkmark or red X will become opaque.

View Locked Permissions

If a check mark or X does not include a button, you cannot change this permission. These permissions are default settings in Canvas.

Lock Permissions



By clicking an icon button, you can prevent others from overriding the set permissions in sub-accounts. This makes sure that the permission stays how the account admin sets it at the top-level.

There are three choices in the menu:

1. Enable and Lock
2. Disable and Lock
3. Use Default and Lock

After choosing the permission setting, a lock icon will appear next to the checkmark or X icon.

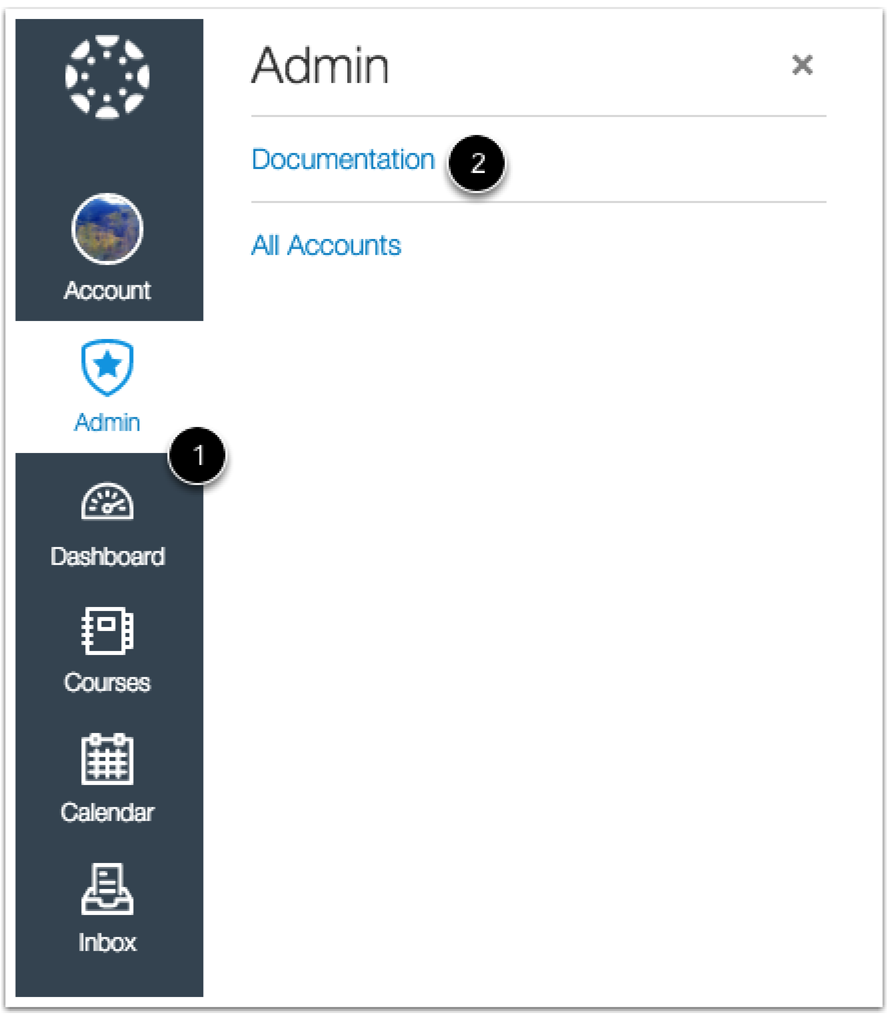
How do I create course-level roles in an account?

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 set course-level permissions.

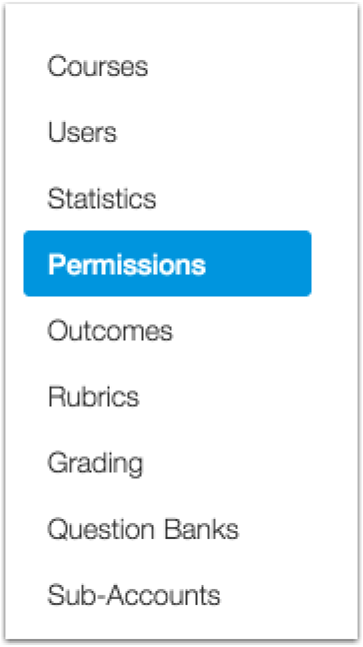
Note: When a user receives an enrollment invitation for a course role, the invitation displays the name of the base role.

Open Account



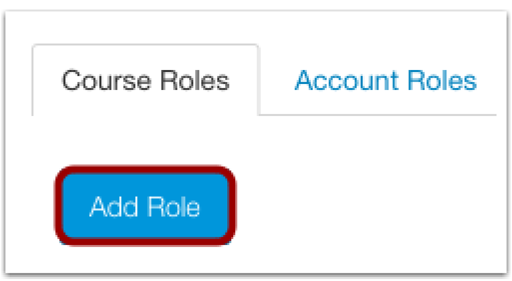
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Permissions



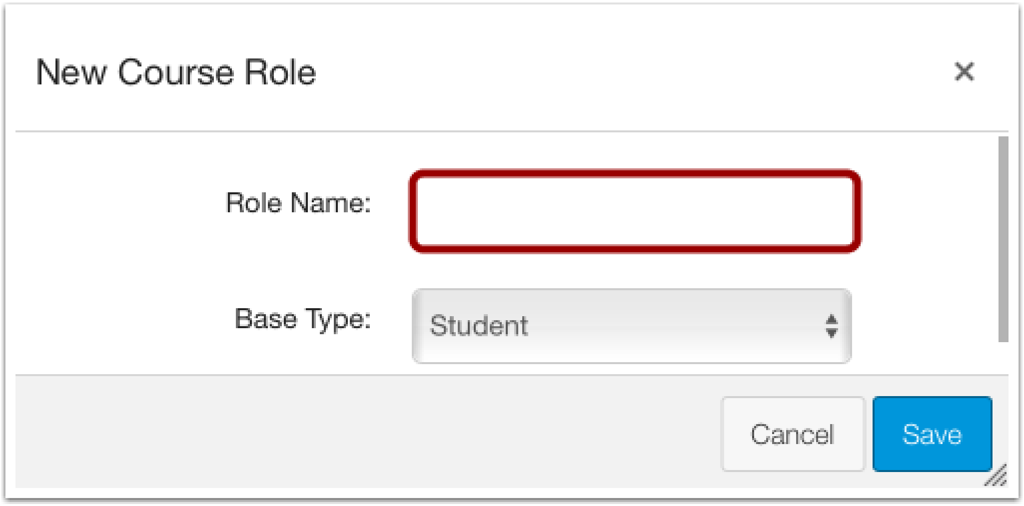
In Account Navigation, click the **Permissions** link.

Add Role



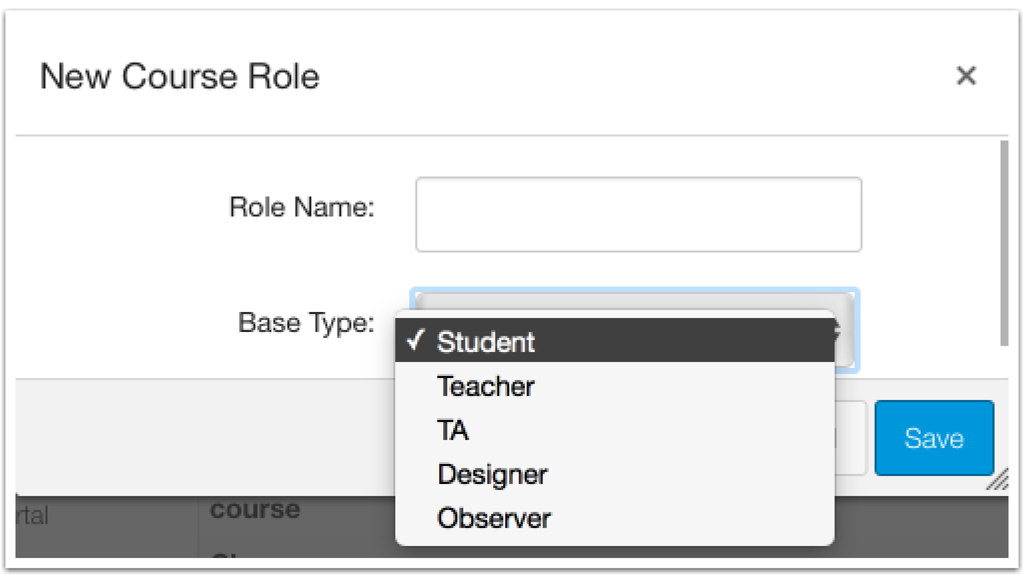
In the Course Roles tab, click the **Add Role** button.

Add Role Name



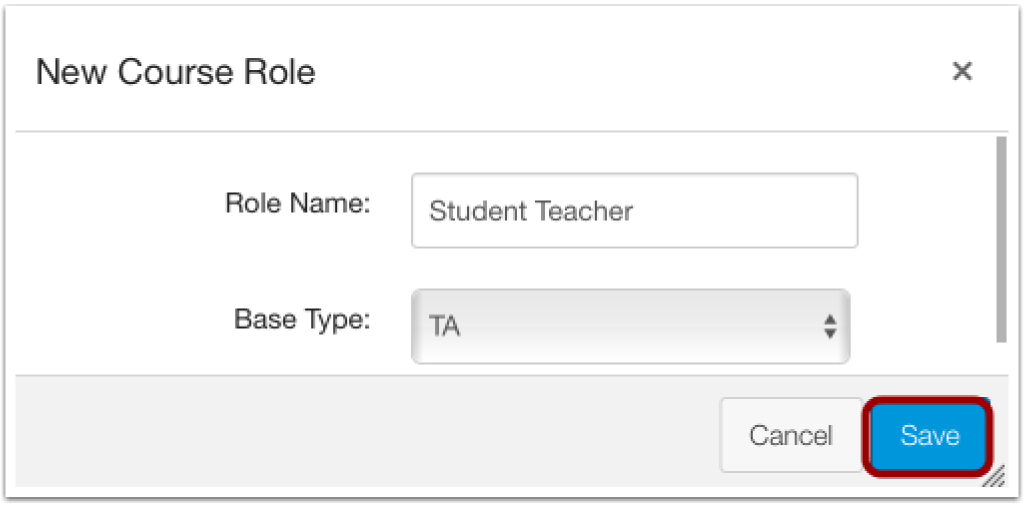
In the **Role Name** field, type the name of the new role.

Select User Type



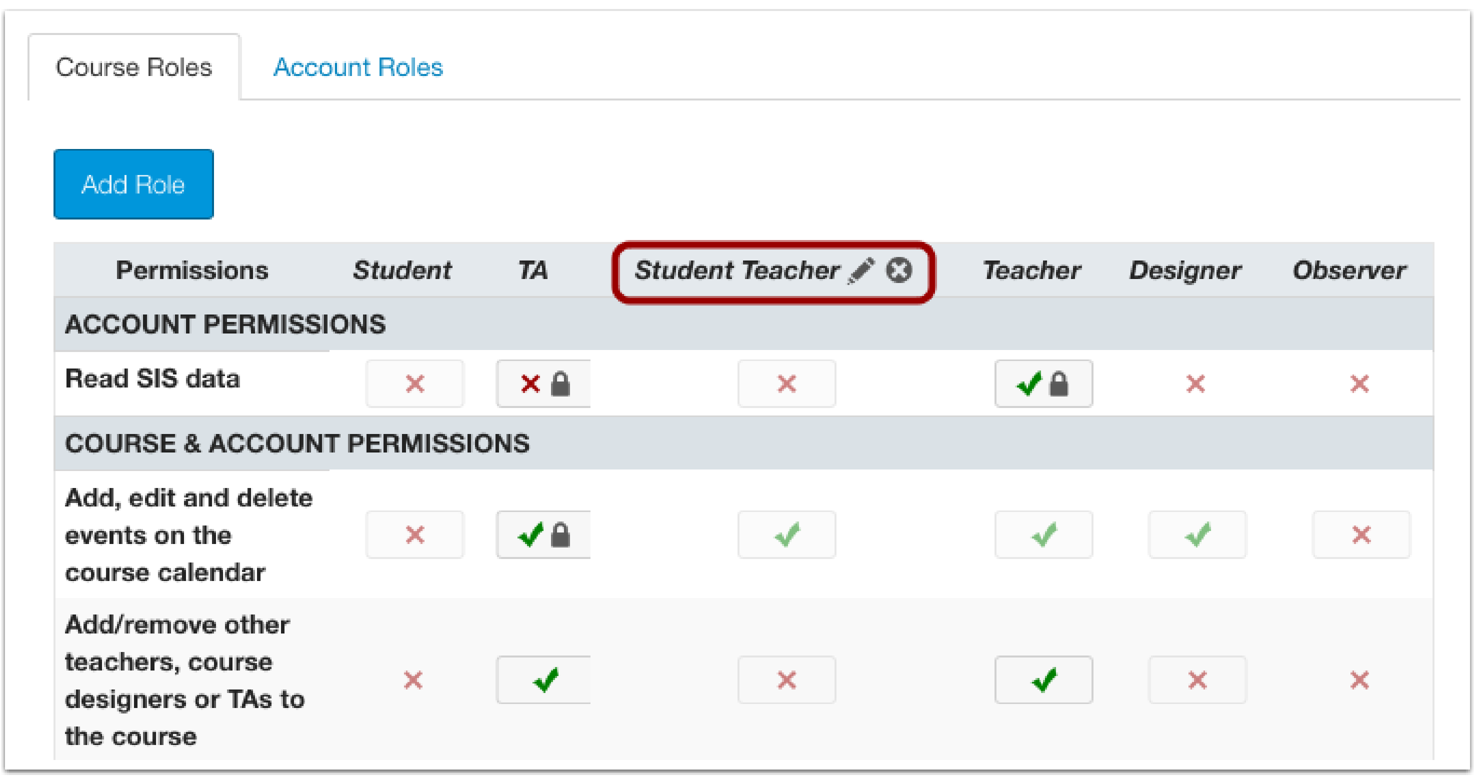
In the Base Type field, select the type of user you want to apply to the role. You can choose from student, teacher, TA, designer, or observer.

Save Role



Click the **Save** button.

View Course Role



View the new course-level role.

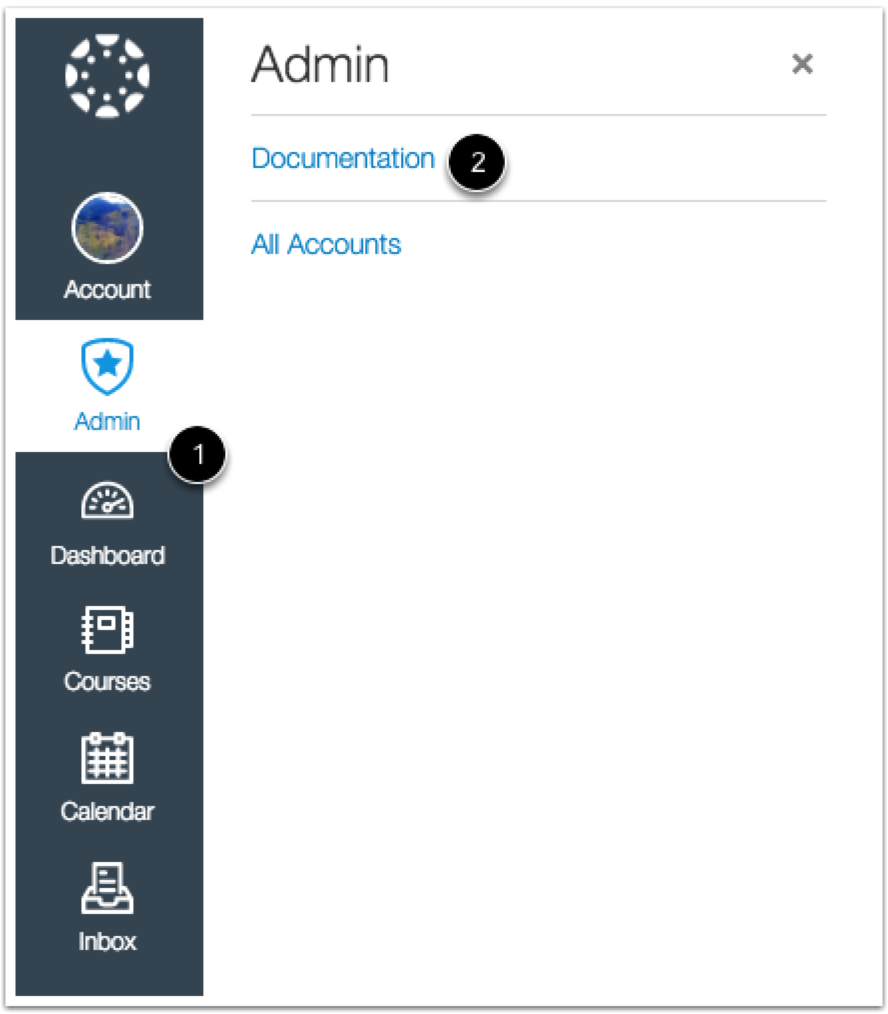
How do I set permissions for a course-level role in an account?

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.

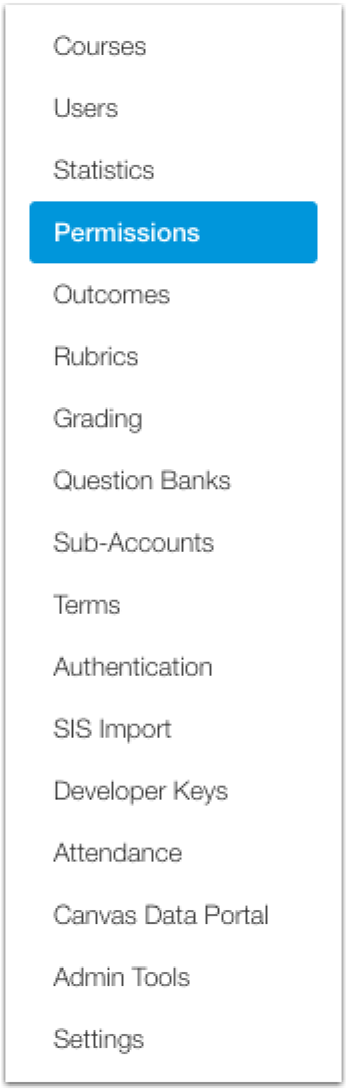
To learn more about course permissions, view the Course Permissions PDF.

Open Account



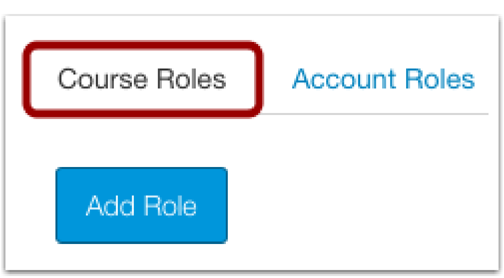
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Permissions



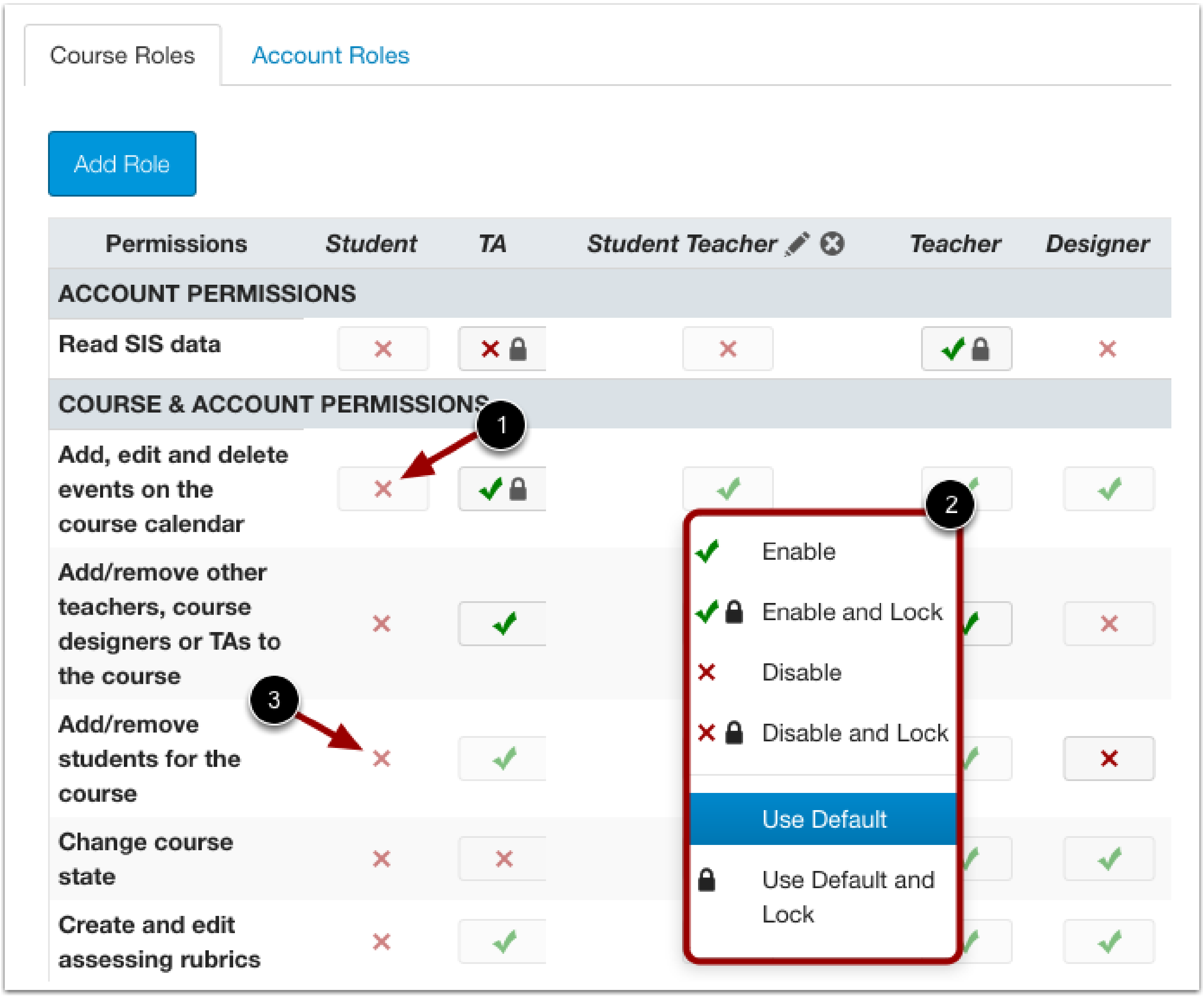
In Account Navigation, click the **Permissions** link.

Open Course Roles



Click the **Course Roles** tab.

Set Permissions



To override any permissions, locate the name of the permission. In the column with the appropriate course-level role, click the opaque **enable** (green check mark) or **disable** (red X) button [1]. In the permission menu [2], choose the new permission by clicking one of the permission options: enable, enable and lock, disable, disable and lock, use default, and use default and lock.

Locked options keep the setting from being changed by subaccount admins in a lower account.

Once you override a permission, the button icon will no longer be opaque.

Note: If a permission icon does not display as a button, you cannot change the permission [3].

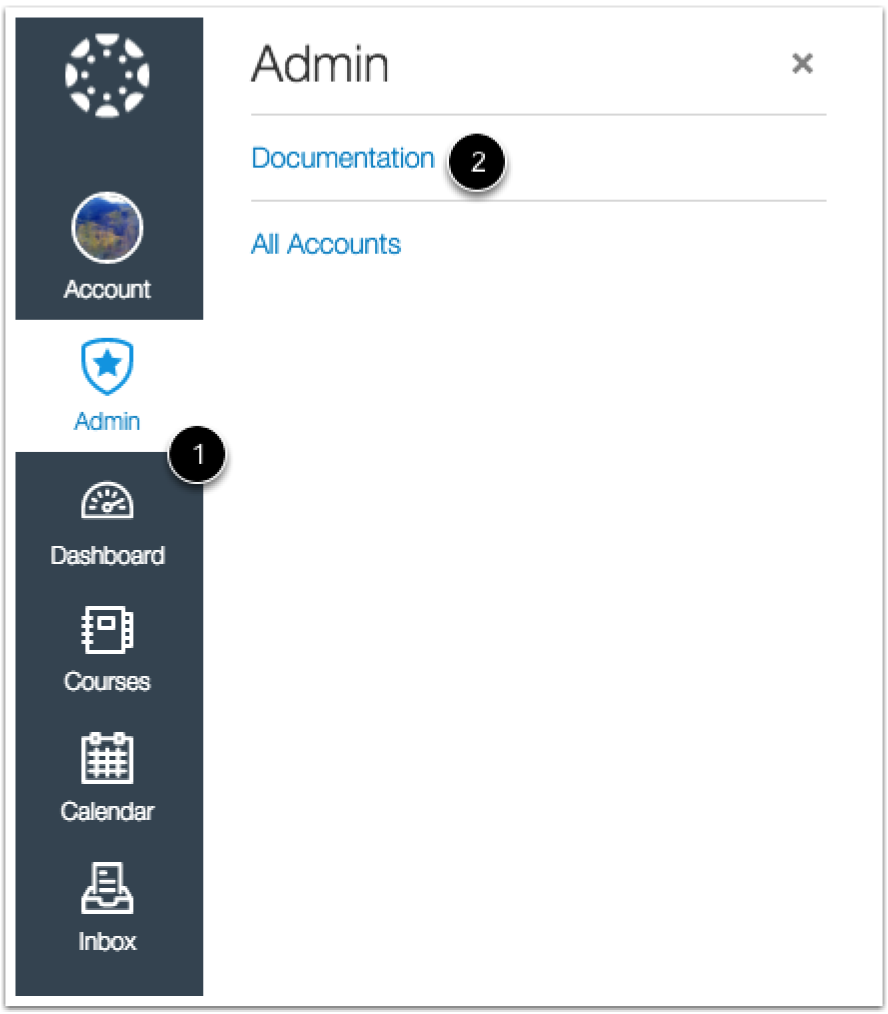
How do I create account-level roles?

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.

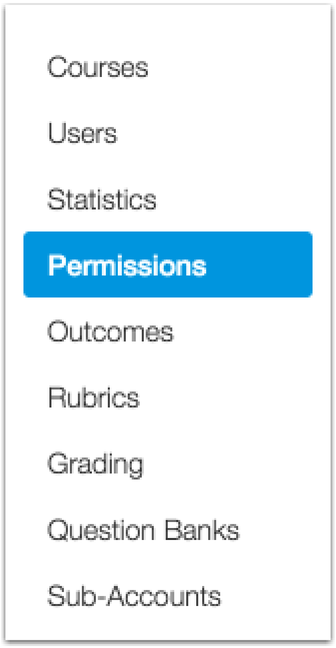
Once a role is created, you can add administrative users and set account-level permissions.

Open Account



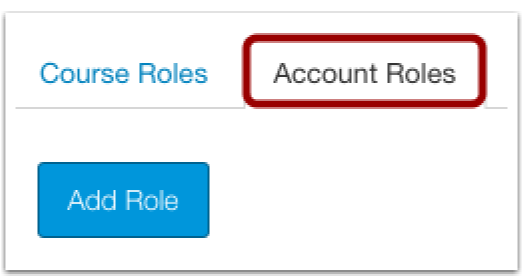
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Permissions



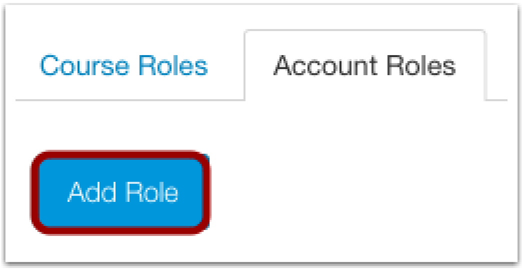
In Account Navigation, click the **Permissions** link.

Open Account Roles



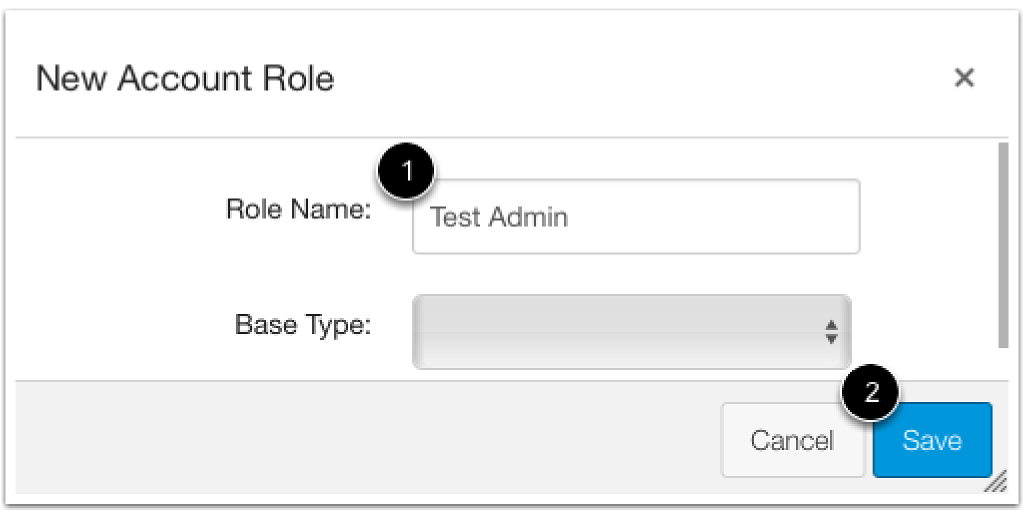
Click the **Account Roles** tab.

Add Role



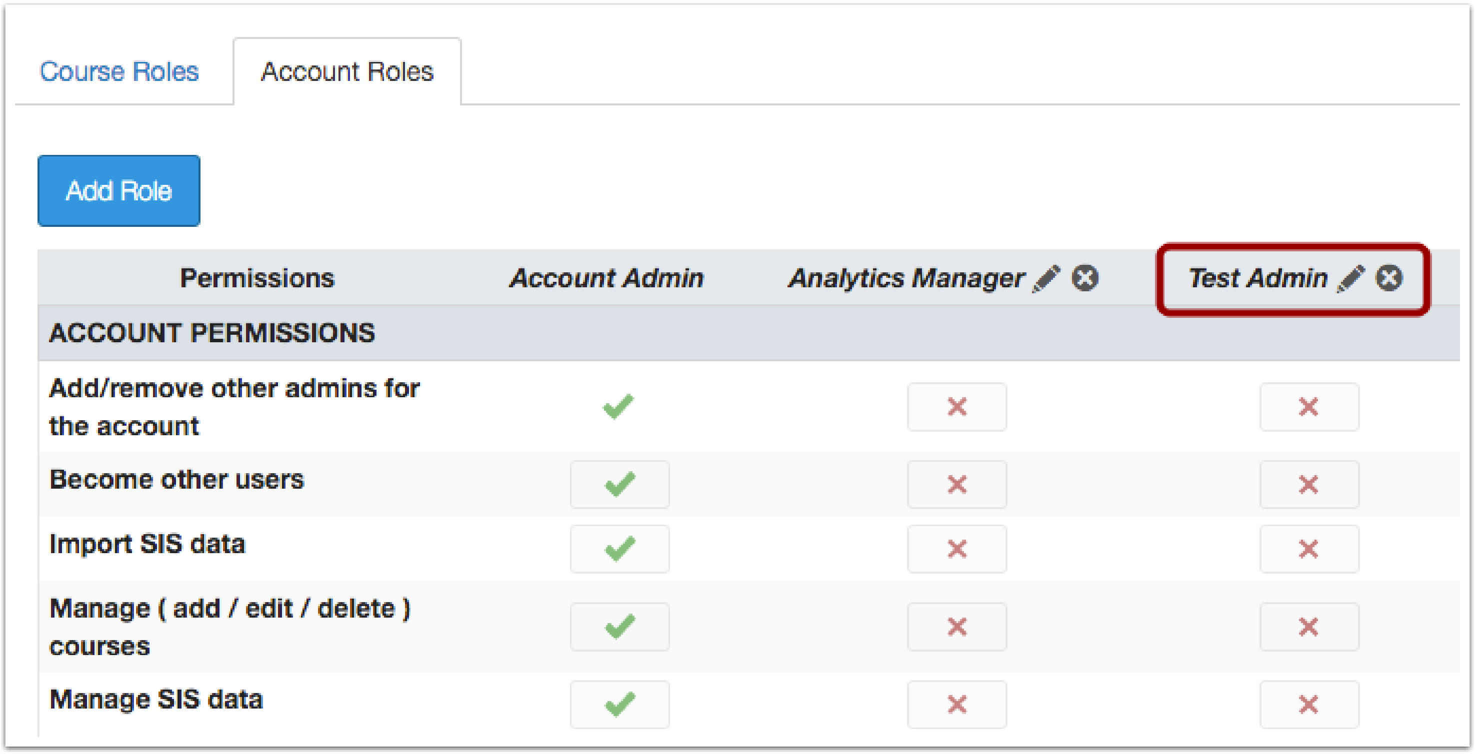
Click the **Add Role** button.

Add Role Name



Type the name of the new role [1] and click the **Save** button [2].

View Account Role



View the new account-level role.

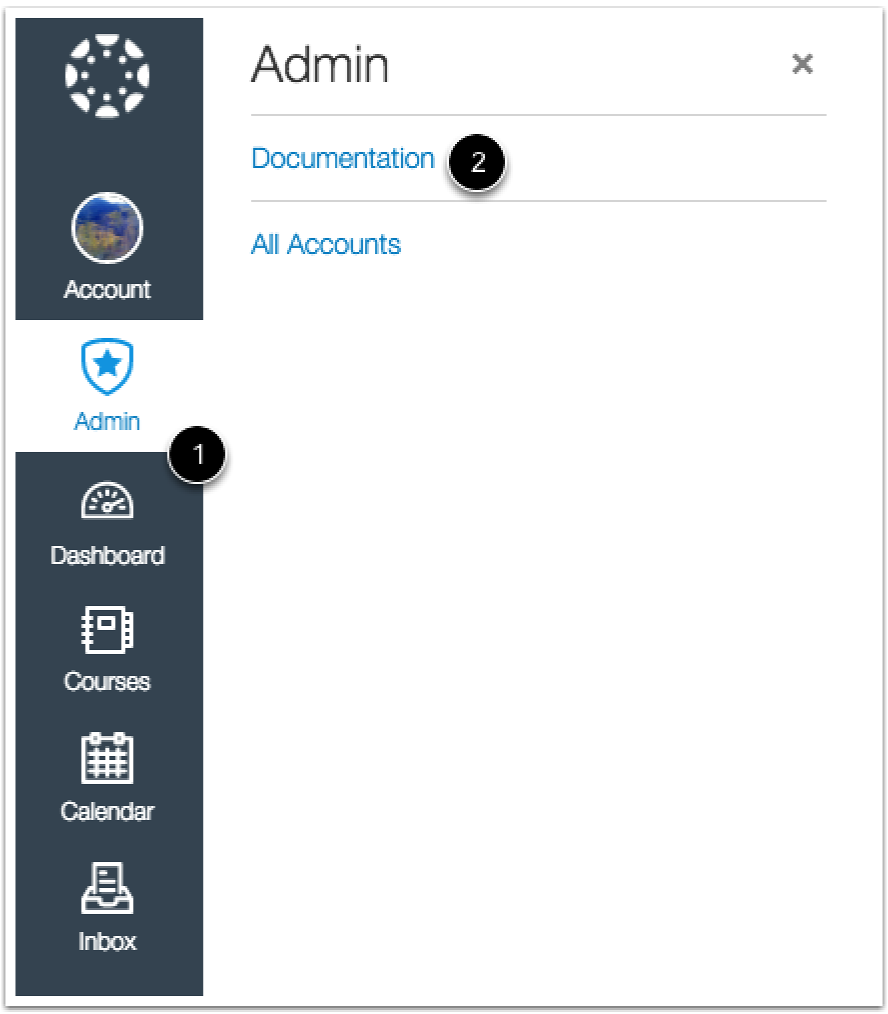
How do I set permissions for an account-level role?

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.

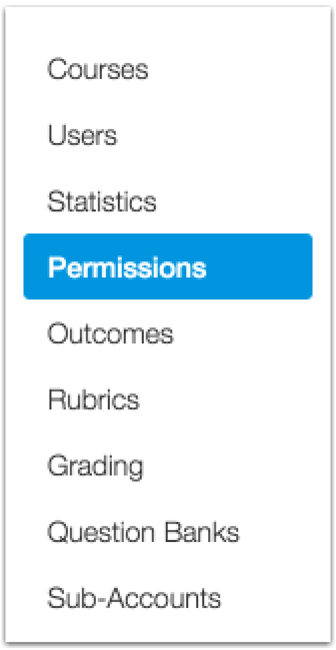
To learn more about account permissions, view the Account Permissions PDF.

Open Account



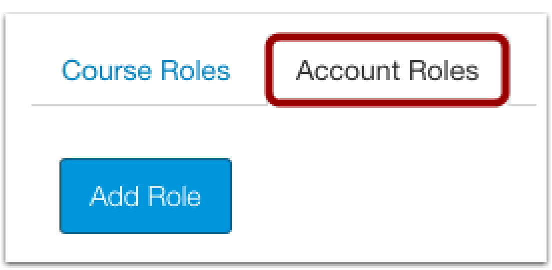
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Permissions



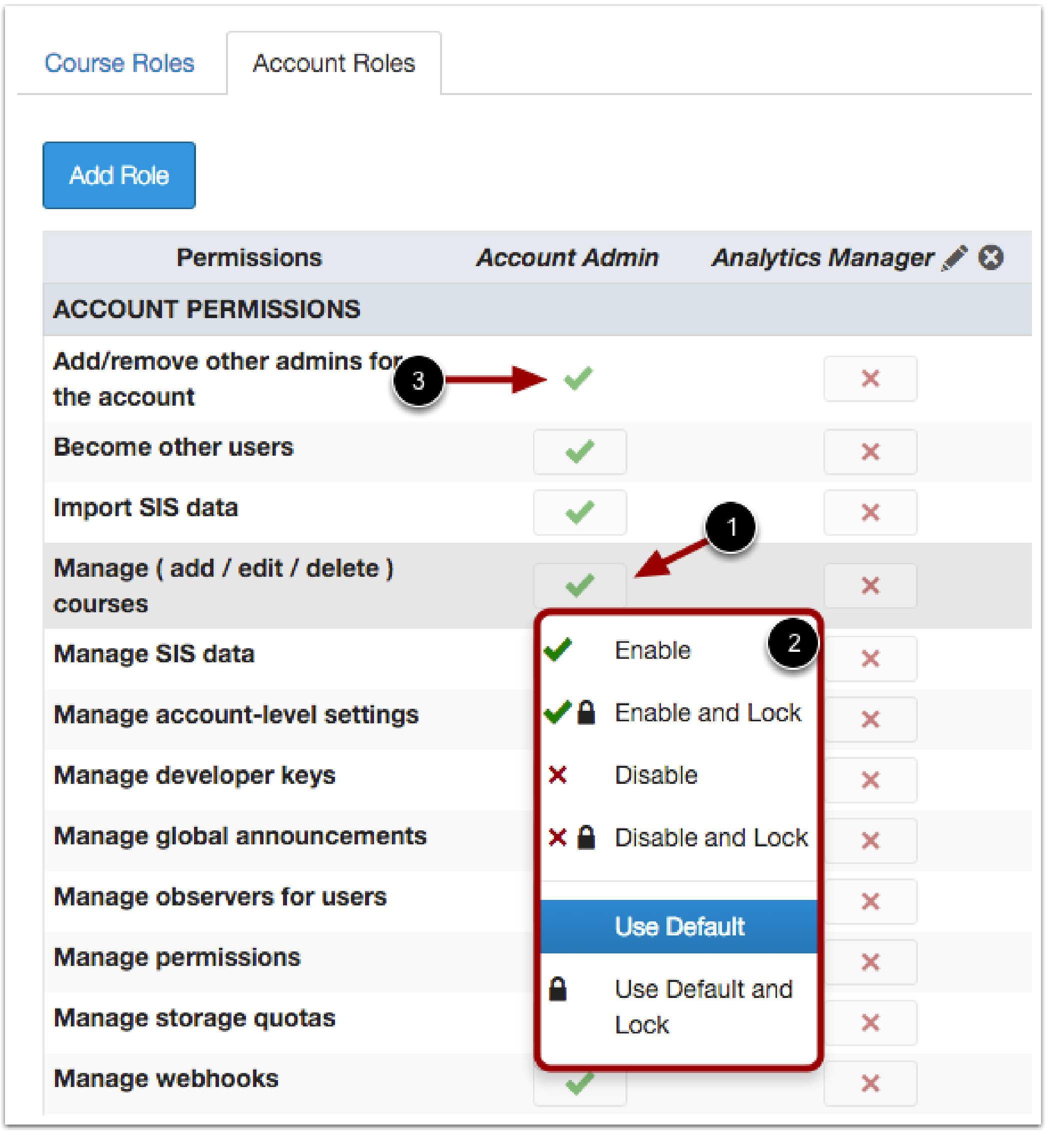
In Account Navigation, click the **Permissions** link.

Open Account Roles



Click the **Account Roles** tab.

Set Permissions



To override any permissions, locate the name of the permission. In the column with the appropriate course-level role, click the opaque **enable** (green check mark) or **disable** (red X) button [1]. In the permission menu [2], choose the new permission by clicking one of the permission options: enable, enable and lock, disable, disable and lock, use default, and use default and lock.

Locked options keep the setting from being changed by subaccount admins in a lower account.

Once you override a permission, the button icon will no longer be opaque.

Note: If a permission icon does not display as a button, you cannot change the permission [3].

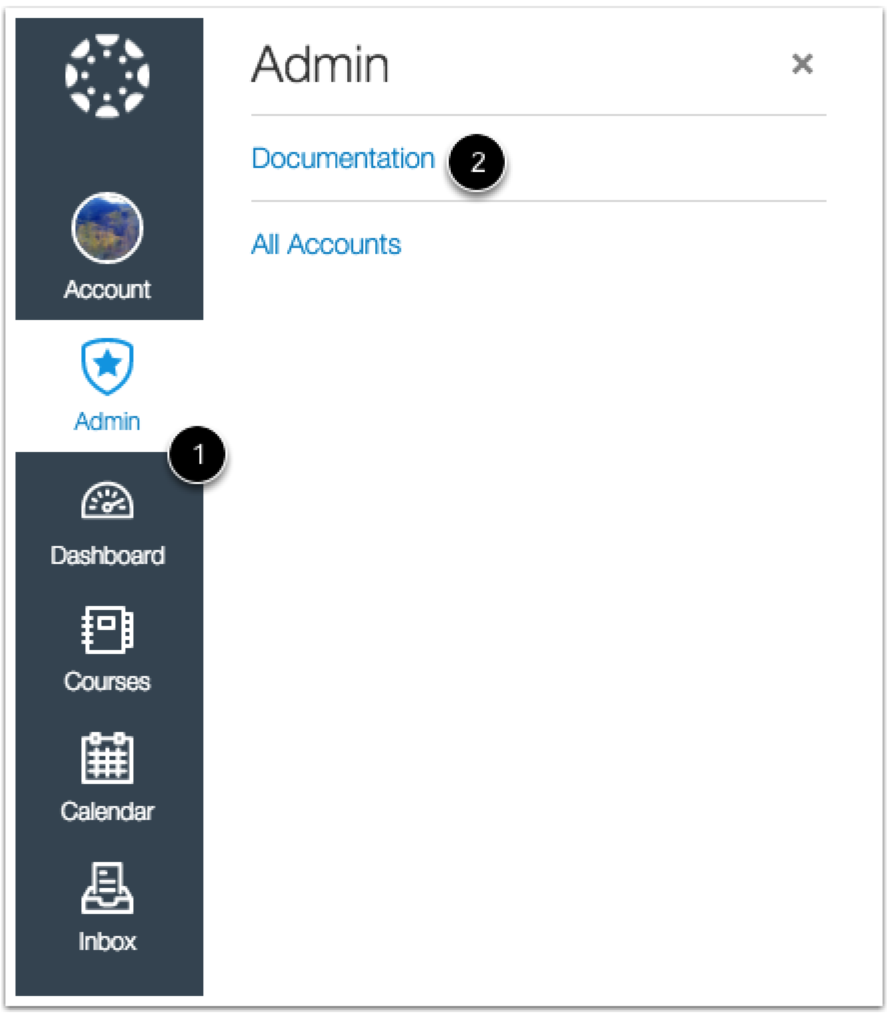
How do I set permissions for a sub-account-level role?

After you have created an account-level role, you can open the Sub-Account permissions and view the permissions granted to sub-admins. Permissions grant or deny access to specific features within a sub-account and can be applied to any user granted an admin-level role. Sub-account admins are created by account admins and are only responsible for their specific sub-account. Learn how to add an administrative user to an account.

Depending on the sub-account role, you may want to override the defaults to create custom permissions.

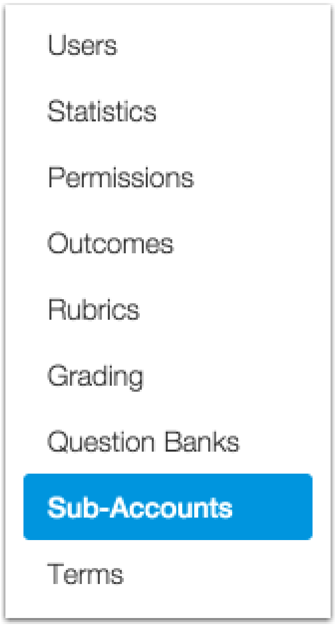
To learn more about account permissions, view the Account Permissions PDF.

Open Account



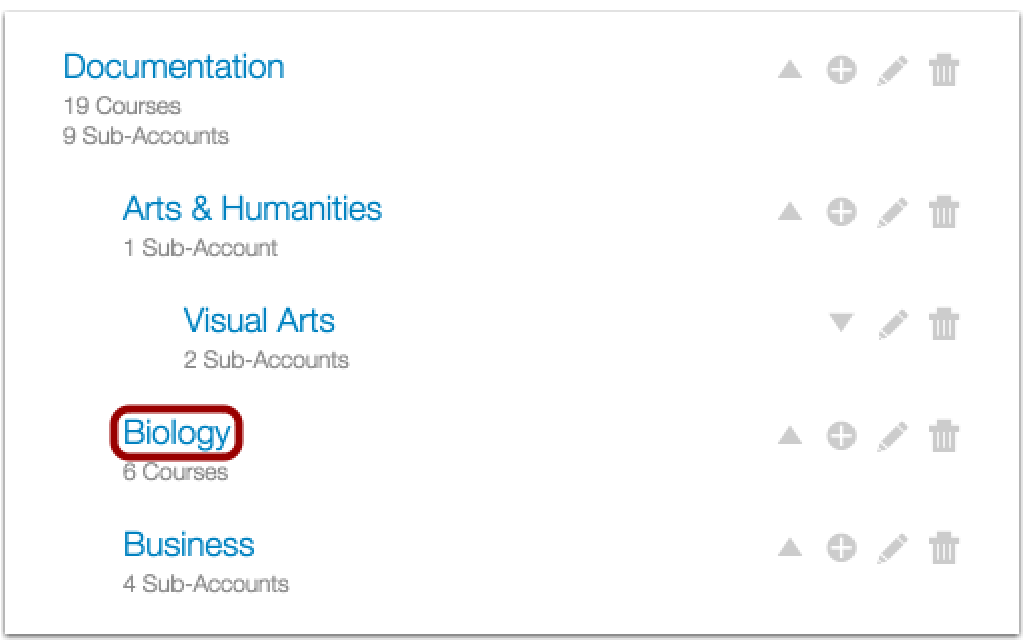
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Sub-Accounts



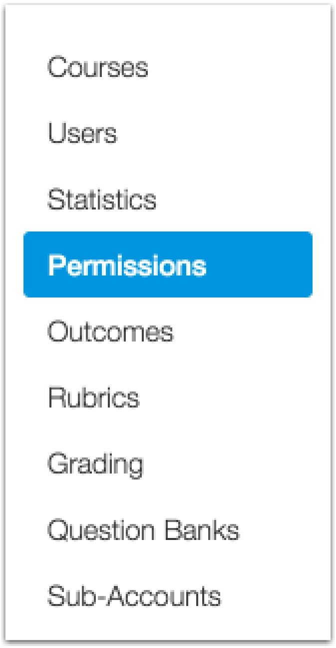
In Account Navigation, click the **Sub-Accounts** link.

Open Sub-Account



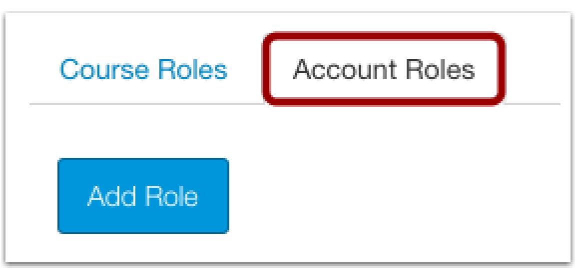
Click the name of the sub-account.

Open Permissions



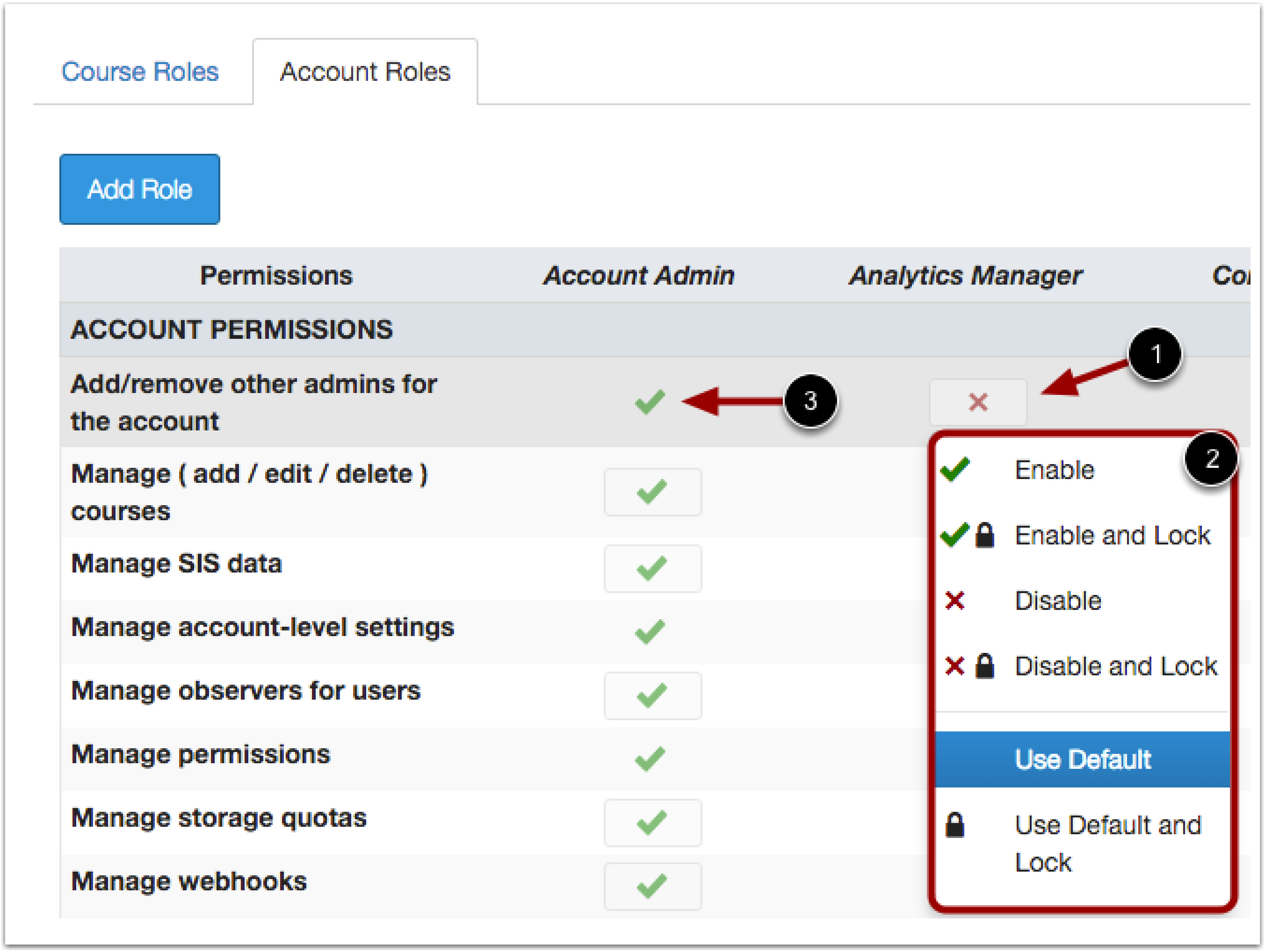
In Sub-account Navigation, click the **Permissions** link.

Open Account Roles



Click the **Account Roles** tab.

Set Permissions



To override any permissions, locate the name of the permission. In the column with the appropriate course-level role, click the opaque **enable** (green check mark) or **disable** (red X) button [1]. In the permission menu [2], choose the new permission by clicking one of the permission options: enable, enable and lock, disable, disable and lock, use default, and use default and lock.

Locked options keep the setting from being changed by any subaccount admins in a lower subaccount.

Once you override a permission, the button icon will no longer be opaque.

Note: If a permission icon does not display as a button, you cannot change the permission [3].

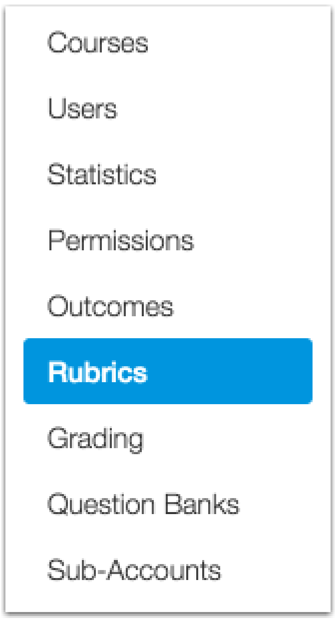
Rubrics

What are account-level rubrics?

You can create account and sub-account level Rubrics in your Canvas instance. This allows anyone in the account to have access to the rubric.

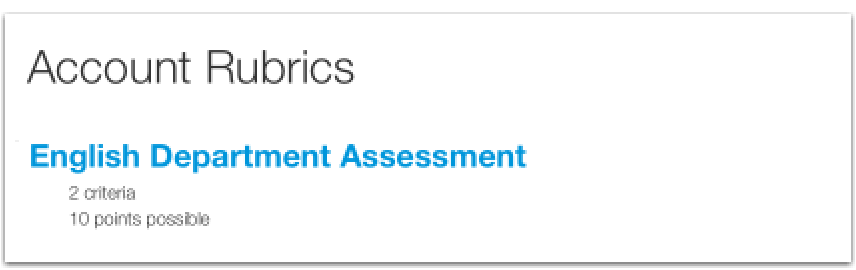
View a video about rubrics.

Open Rubrics



Account-level rubrics are rubrics that are created at the account or sub-account level. They can be used by any course within that account or sub-account for assignments, discussions, or quizzes. If an account-level rubric is used in more than one place, it becomes uneditable, but is still usable.

When Would I Use Account-Level Rubrics?

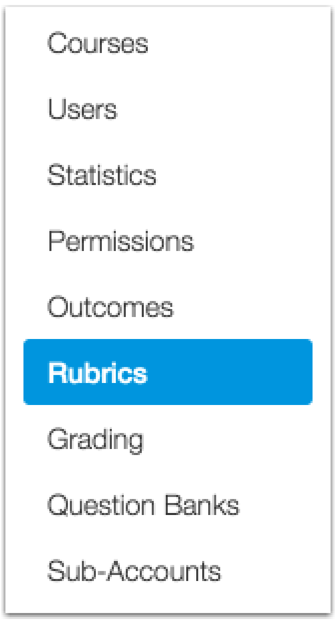


Account-level rubrics can be used to create institutional or departmental question repositories. The purpose of account-level rubrics is to provide resources for teachers, not control content. For example, if the English department offered several courses to teach basic grammar rules to students, a department could create a sub-account level rubric. Instructors could then access the rubric to offer the same evaluation standards to students in different courses.

How do I create 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.

Open Rubrics

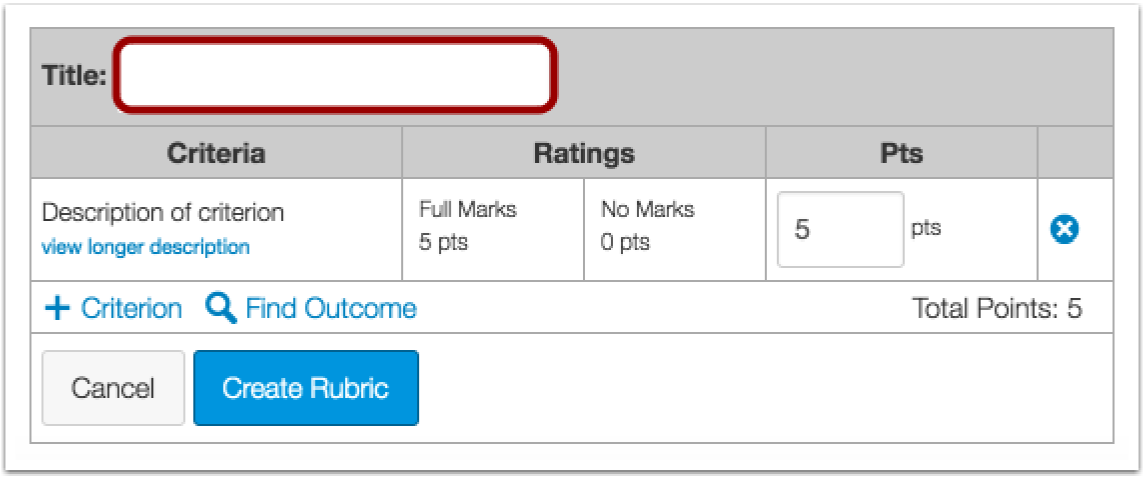


In Account Navigation, click the **Rubrics** link.

Add Rubric

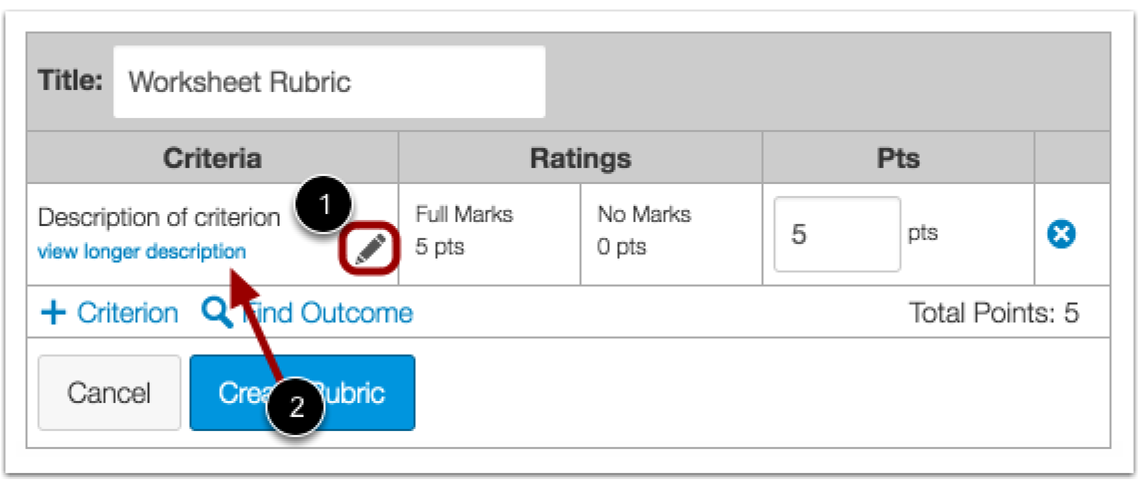
Click the **Add Rubric** button.

Create Title



In the **Title** field, create 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

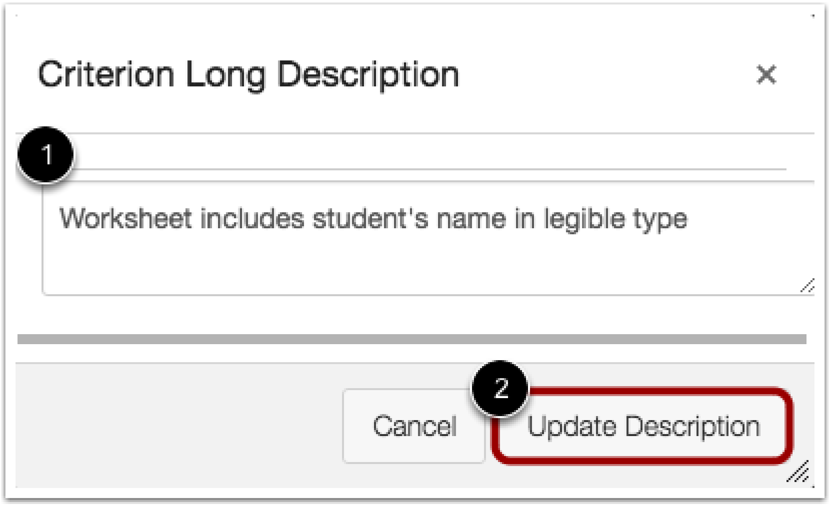


The rubric includes on default criterion entry. To add a short criterion description, hover over the criterion and click the **Edit** icon [1].

To add a longer description to the criterion, click the **view longer description** link [2]. The longer description helps students understand more information about the criterion. The long description does not display directly in the rubric but can be accessed by all users.

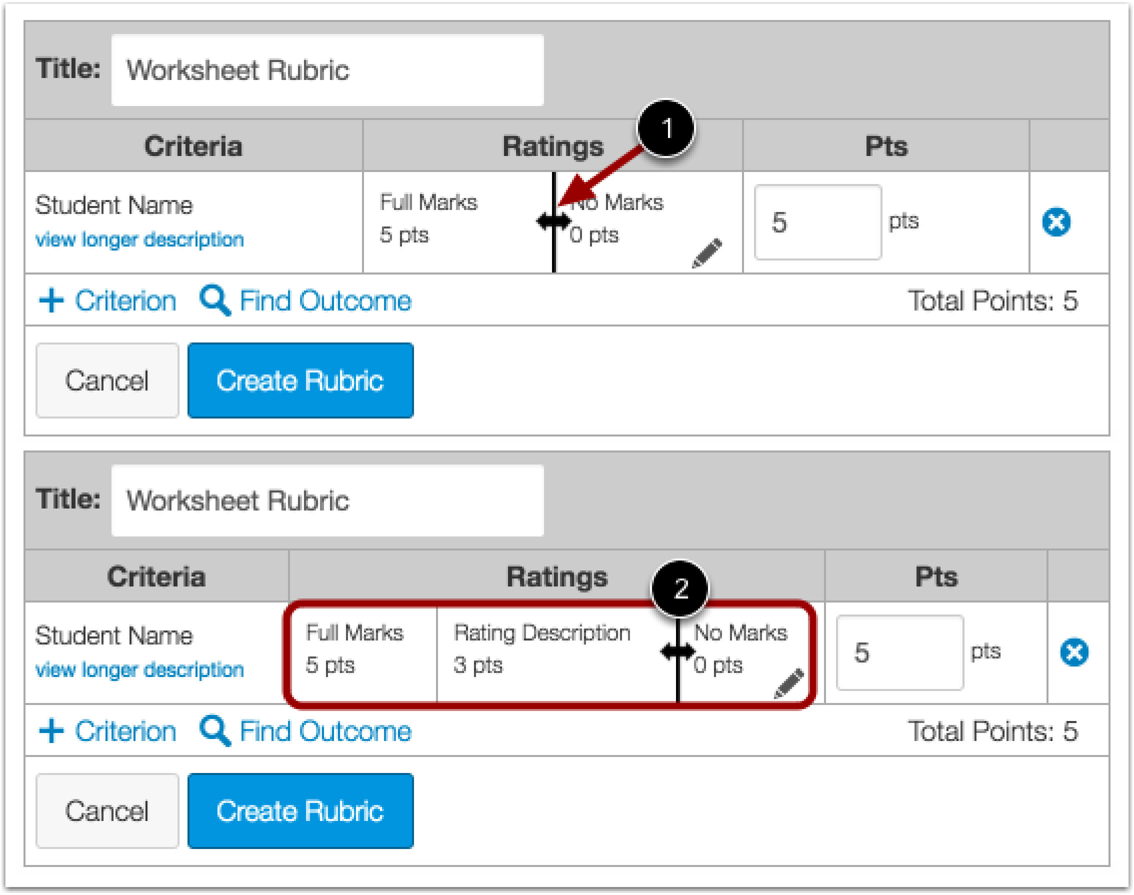
Note: Currently criterion cannot be reordered after they are added to a rubric. If you want to display criterion in a specific order, make sure you create them in the order that you prefer.

Add Longer Description



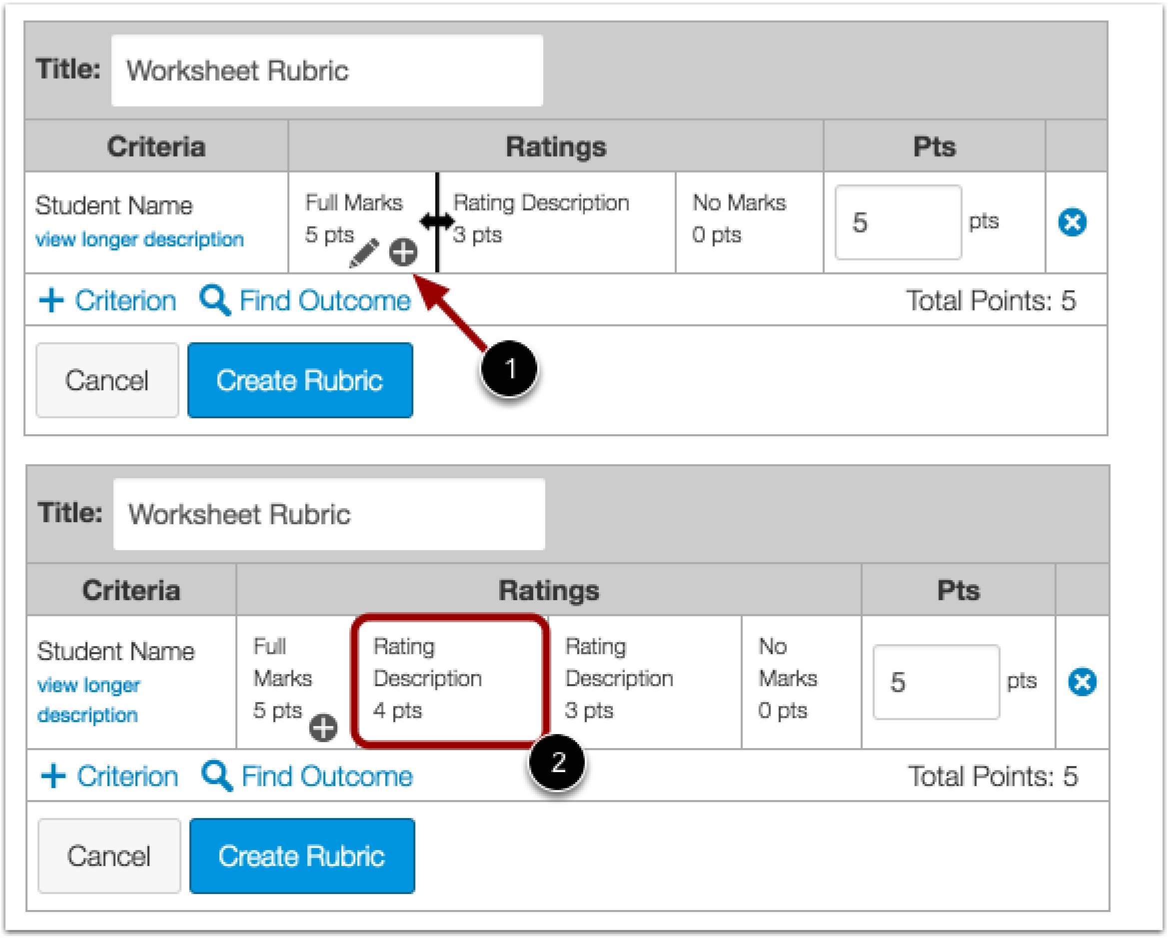
To add a long description, enter a description for the criterion [1], then click the **Update Description** button [2].

Split Ratings



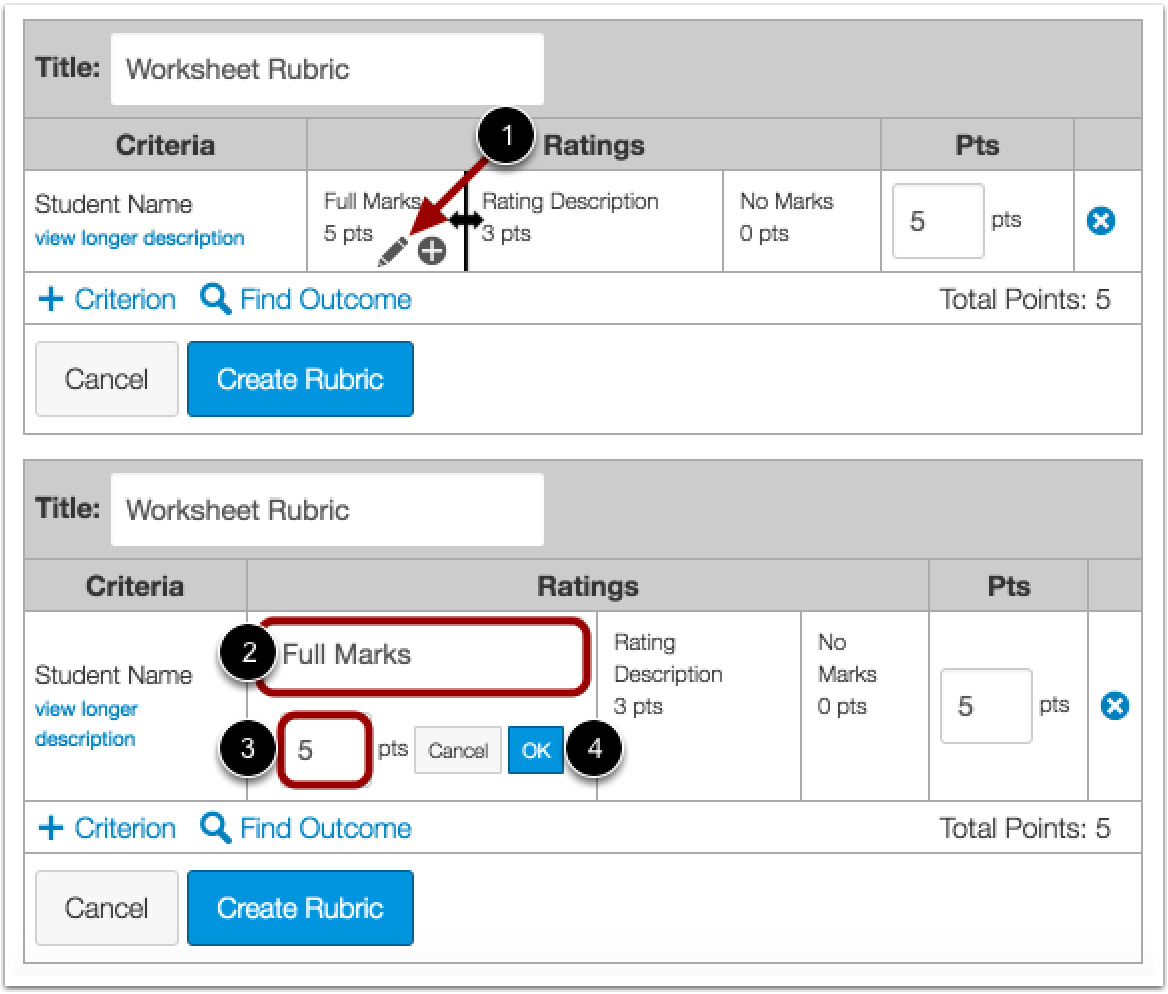
Rubric ratings default to 5 points, awarding 5 points for full rubric marks and 0 points for no rubric marks. To split a rubric rating, hover over a rating and click the double-ended arrow [1]. Split cells on the row as often as necessary to created the desired number of ratings [2].

Add Ratings



You can also add ratings in incremental point values by hovering over a rating and clicking the **Add Rating** icon [1]. The rubric will create a new rating to the right showing a whole-number point value between the existing ratings [2].

Edit Rating

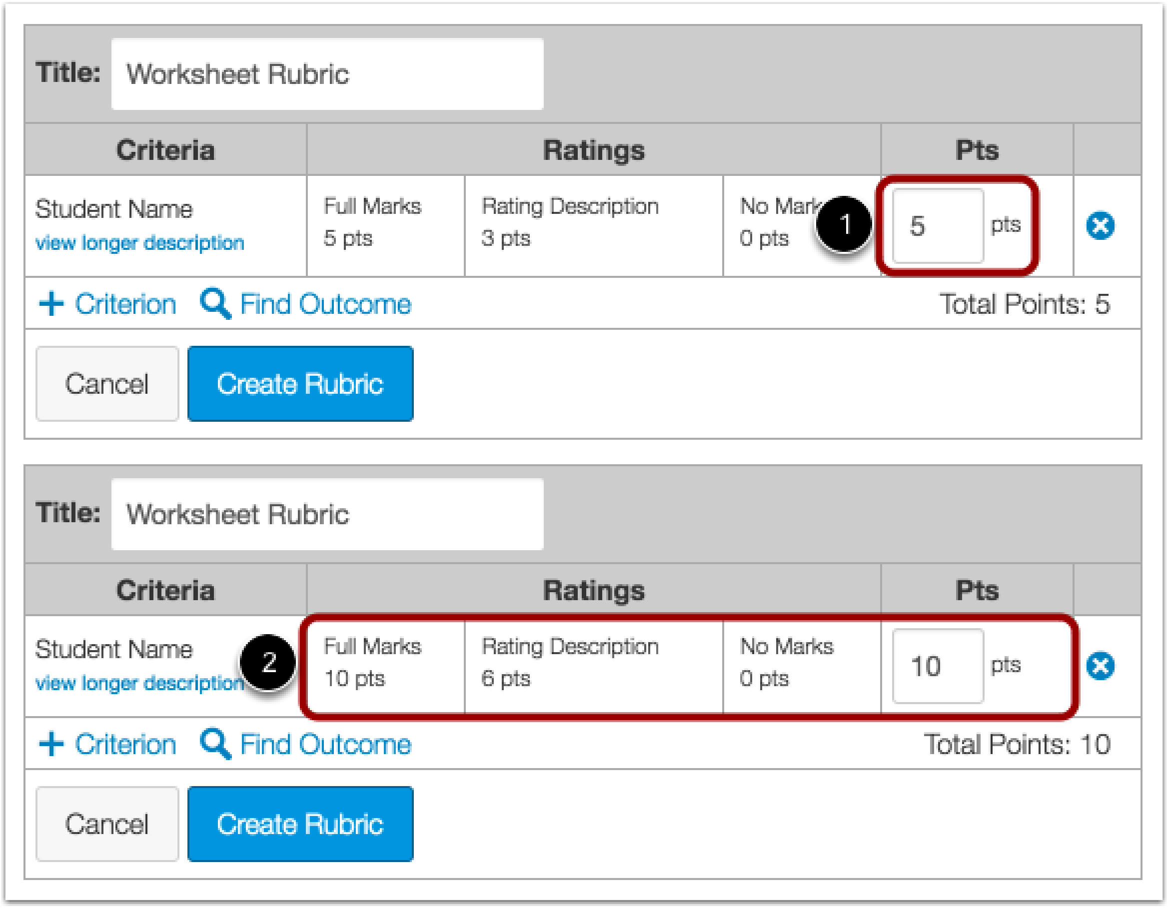


For each rating, you can edit the rating description and the number of points assigned to the rating. To edit a rating, hover over the rating and click the **Edit** icon [1]. To edit the name of the rating, enter a new name in the text field [2].

To enter a new point value for the rating, enter the point value in the points field [3]. Points can be whole (1, 5, 10) or decimal (0.3, 0.5, 2.75) numbers. 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.

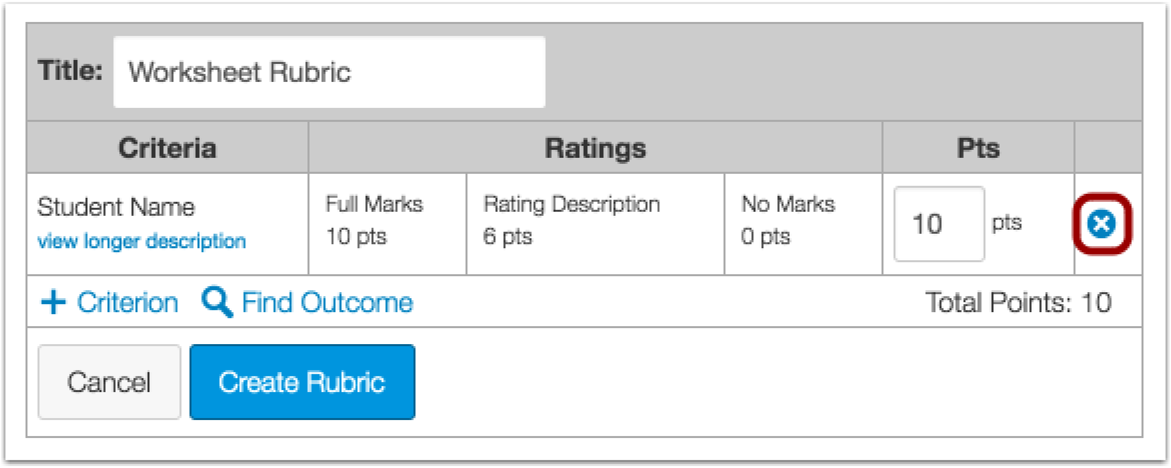
Click the **OK** button [4].

Edit Criterion Point Value



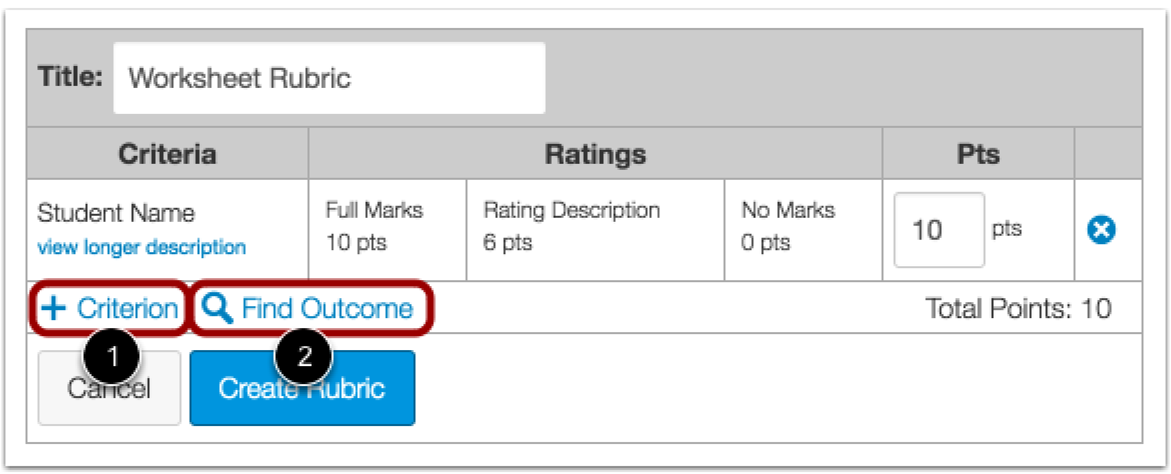
If you want to adjust the total point value of the criterion, enter the number of points in the **Points** field [1]. The first rating (full marks) assuming the overall point value and any incremental ratings adjust appropriately [2]. However, you can always go back and edit specific ratings if you don't want to accept the automatic adjustments.

Delete Criterion



To delete the entire criterion, click the **remove** icon.

Add Criterion

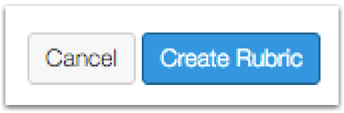


To create a new criterion for the rubric, click the **Add Criterion** link [1].

To find an existing account-level outcome to align with the rubric, click the **Find Outcome** link [2].

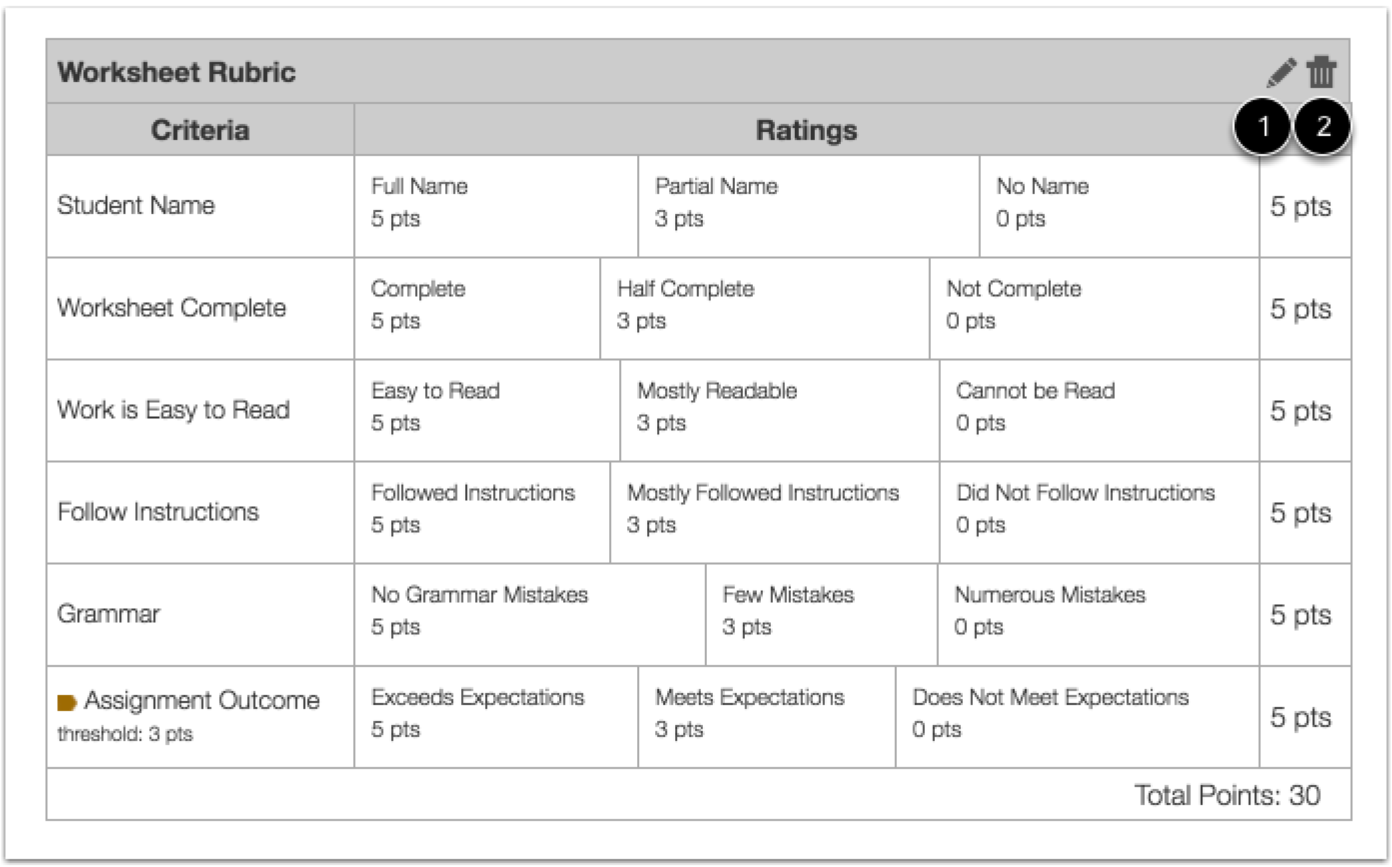
Note: Outcomes cannot be edited directly in a rubric.

Create Rubric



Click the **Create Rubric** button.

View Rubric



Worksheet Rubric

Criteria	Ratings			
Student Name	Full Name 5 pts	Partial Name 3 pts	No Name 0 pts	5 pts
Worksheet Complete	Complete 5 pts	Half Complete 3 pts	Not Complete 0 pts	5 pts
Work is Easy to Read	Easy to Read 5 pts	Mostly Readable 3 pts	Cannot be Read 0 pts	5 pts
Follow Instructions	Followed Instructions 5 pts	Mostly Followed Instructions 3 pts	Did Not Follow Instructions 0 pts	5 pts
Grammar	No Grammar Mistakes 5 pts	Few Mistakes 3 pts	Numerous Mistakes 0 pts	5 pts
Assignment Outcome threshold: 3 pts	Exceeds Expectations 5 pts	Meets Expectations 3 pts	Does Not Meet Expectations 0 pts	5 pts
				Total Points: 30

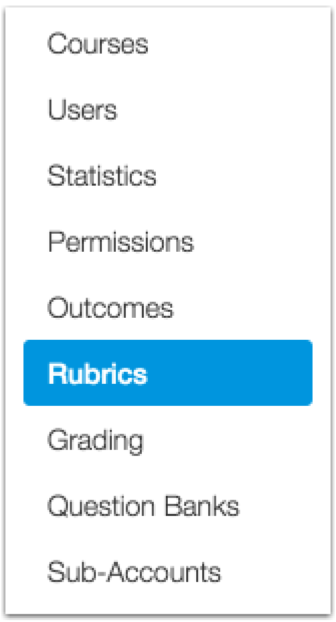
View the new rubric.

To edit the rubric, click the **Edit** icon [1]. To delete the rubric, click the **Delete** icon [2].

How do I delete a rubric in an account?

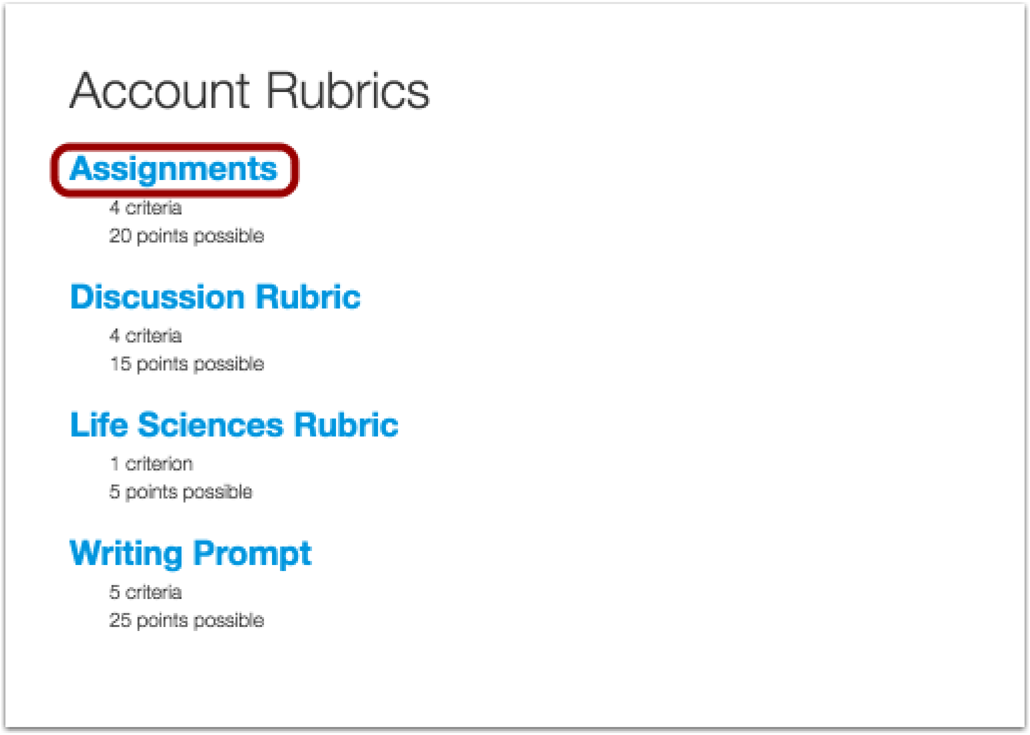
This lesson will walk you through deleting a Rubric from an account.

Open Rubrics



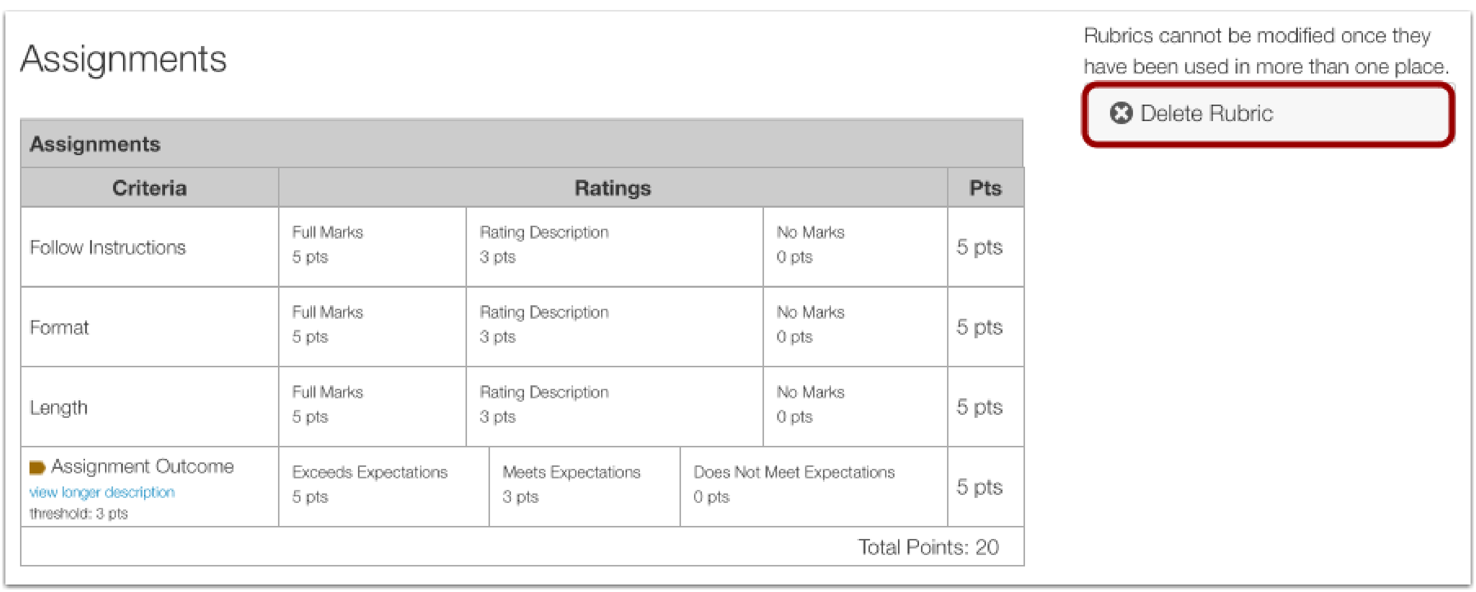
In Account Navigation, click the **Rubrics** link.

Open Rubric



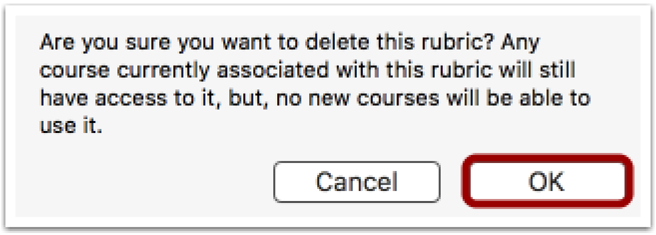
Click the name of the rubric you want to delete.

Delete Rubric



Click the **Delete Rubric** button.

Confirm Deletion



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 align an outcome with a rubric in an account?

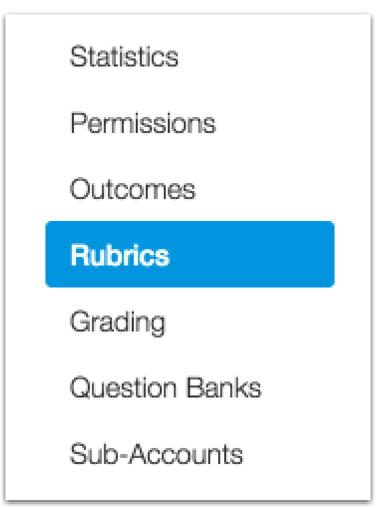
You can align any outcome in your course to a rubric. Rubrics are used to help students understand expectations for an assignment and how their submissions will be graded. Outcomes can be aligned with a rubric for additional assessment and measurable performance.

To align an outcome, the outcome must already exist for your account. Learn how to create account outcomes.

Notes:

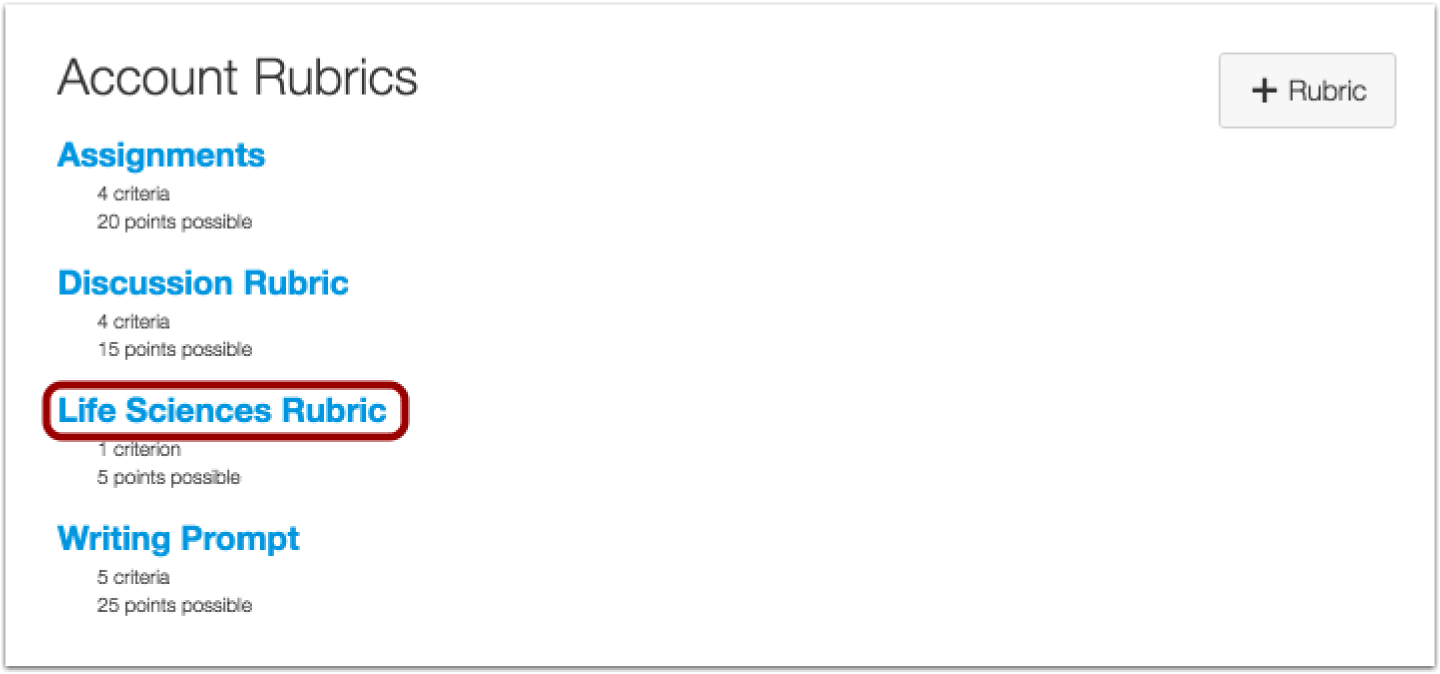
- Outcomes can be added to rubrics, but rubrics cannot be added to outcomes.
- Rubrics cannot be edited once they have been added to more than one assignment in a course.

Open Rubrics



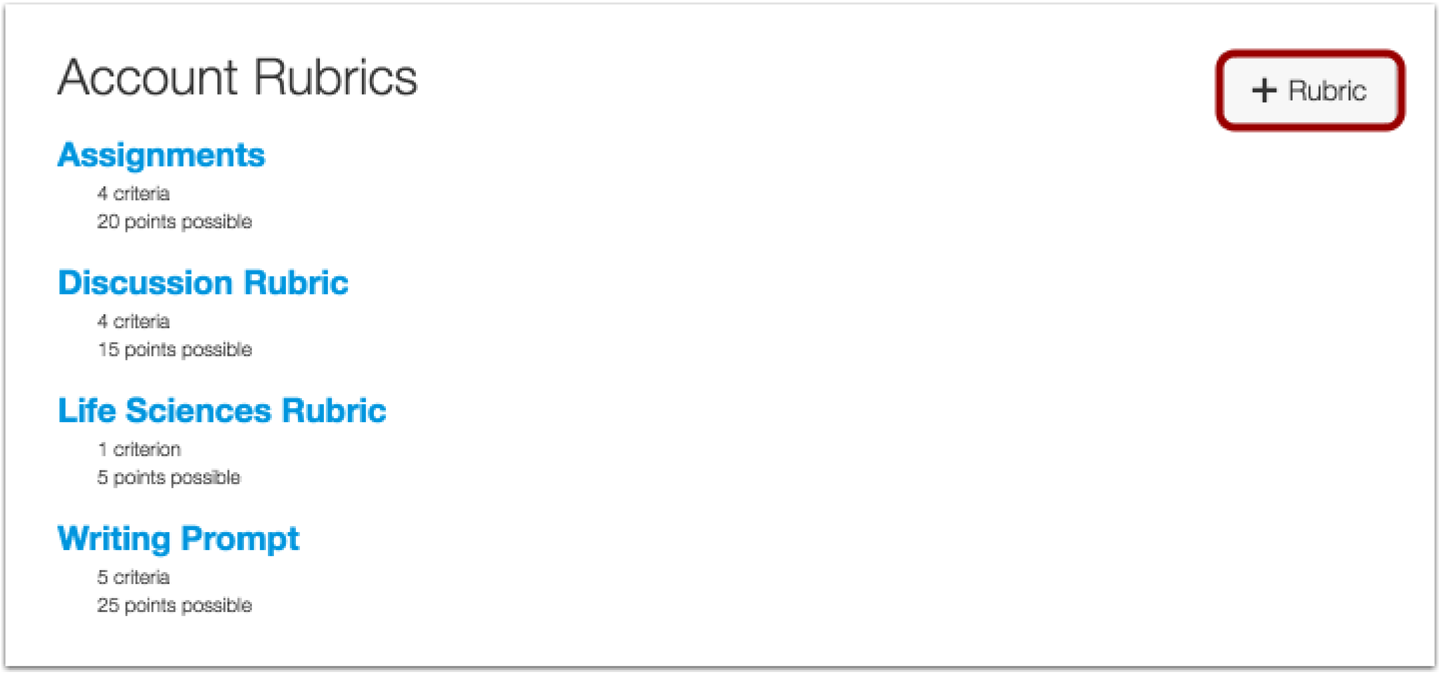
In Account Navigation, click the **Rubrics** link.

Open Rubric



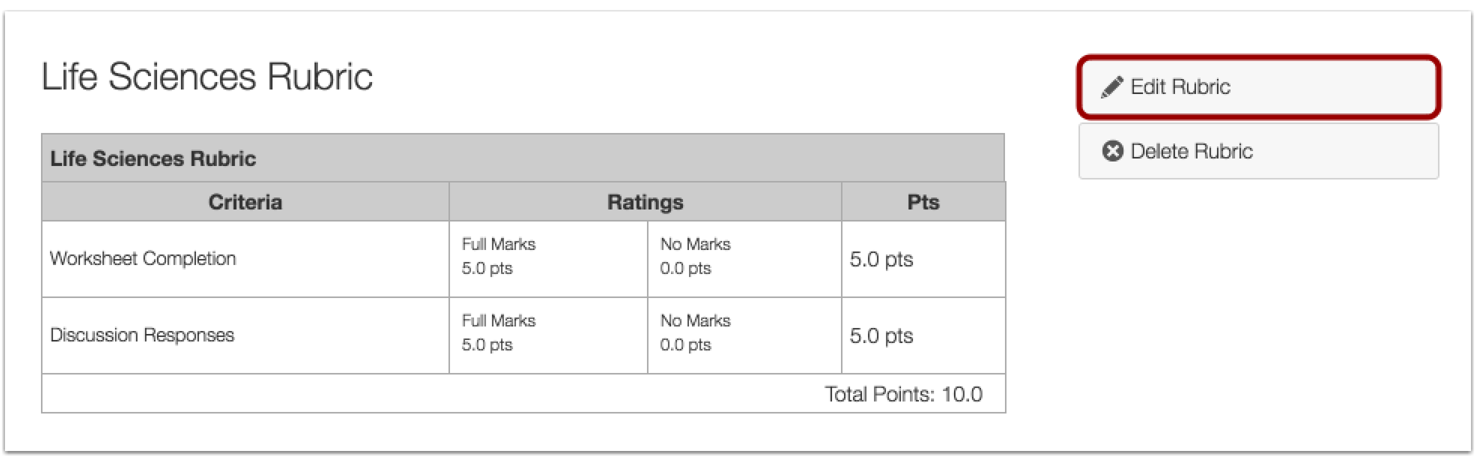
Click the name of a rubric.

Create Rubric



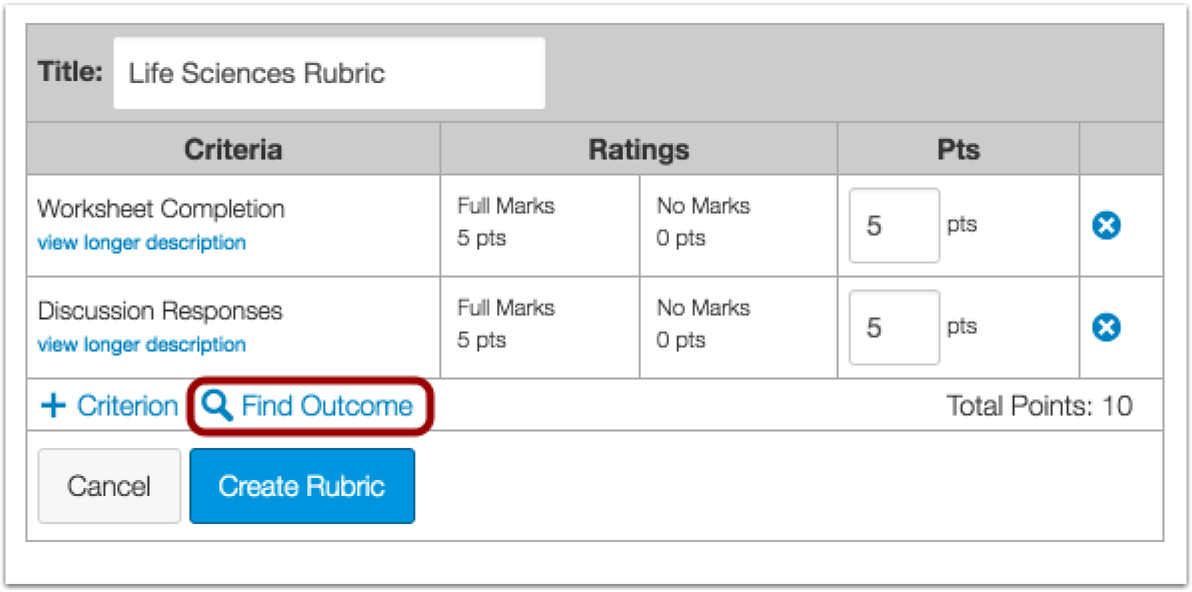
To create a new rubric, click the **Add Rubric** button.

Edit Rubric



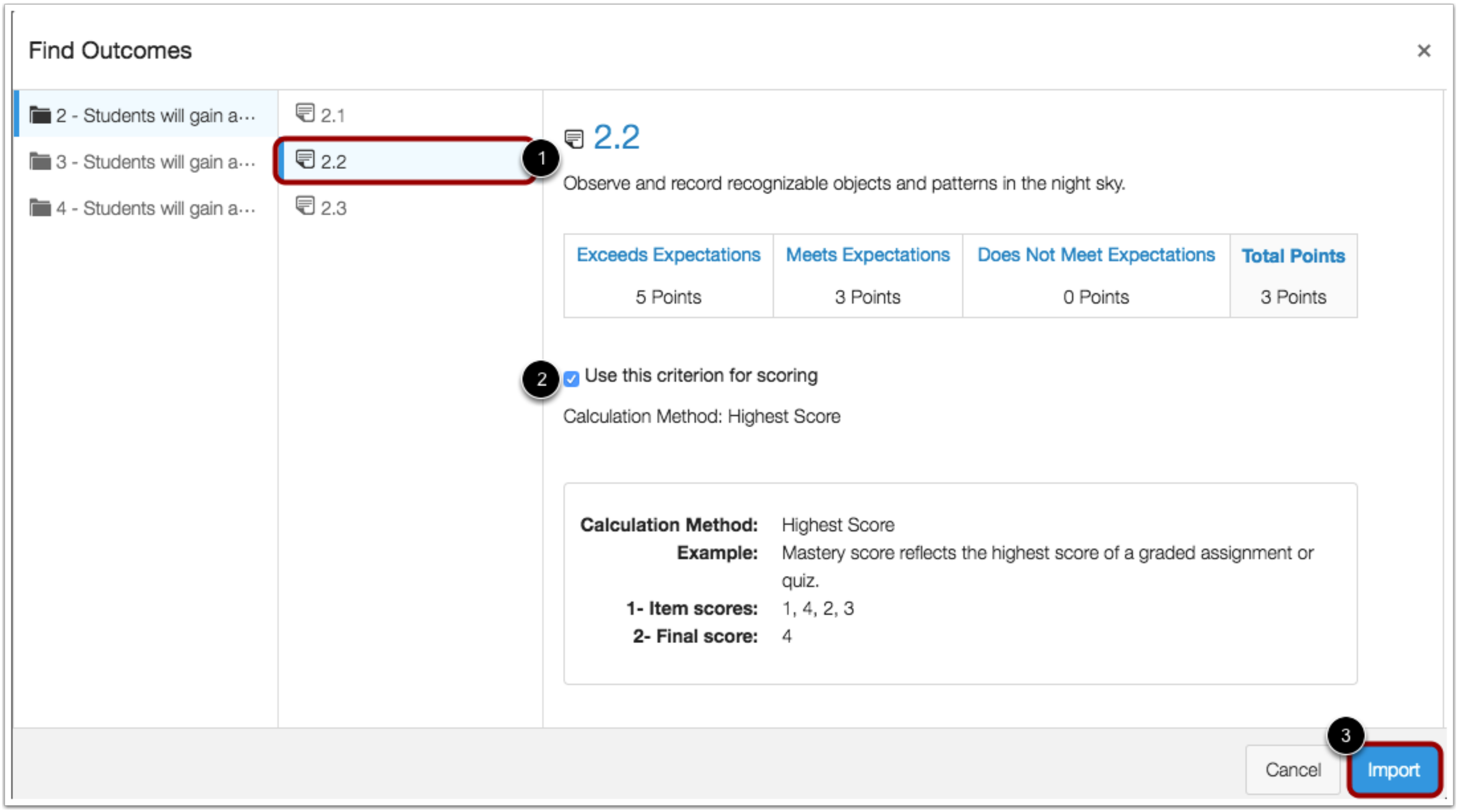
Click the **Edit Rubric** button.

Find Outcome



Click the **Find Outcome** link.

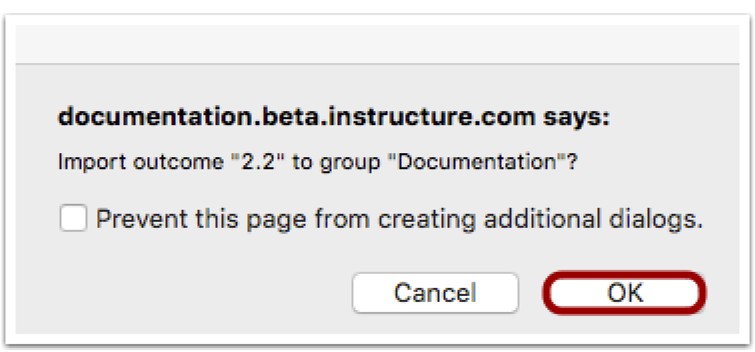
Import Outcome



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].

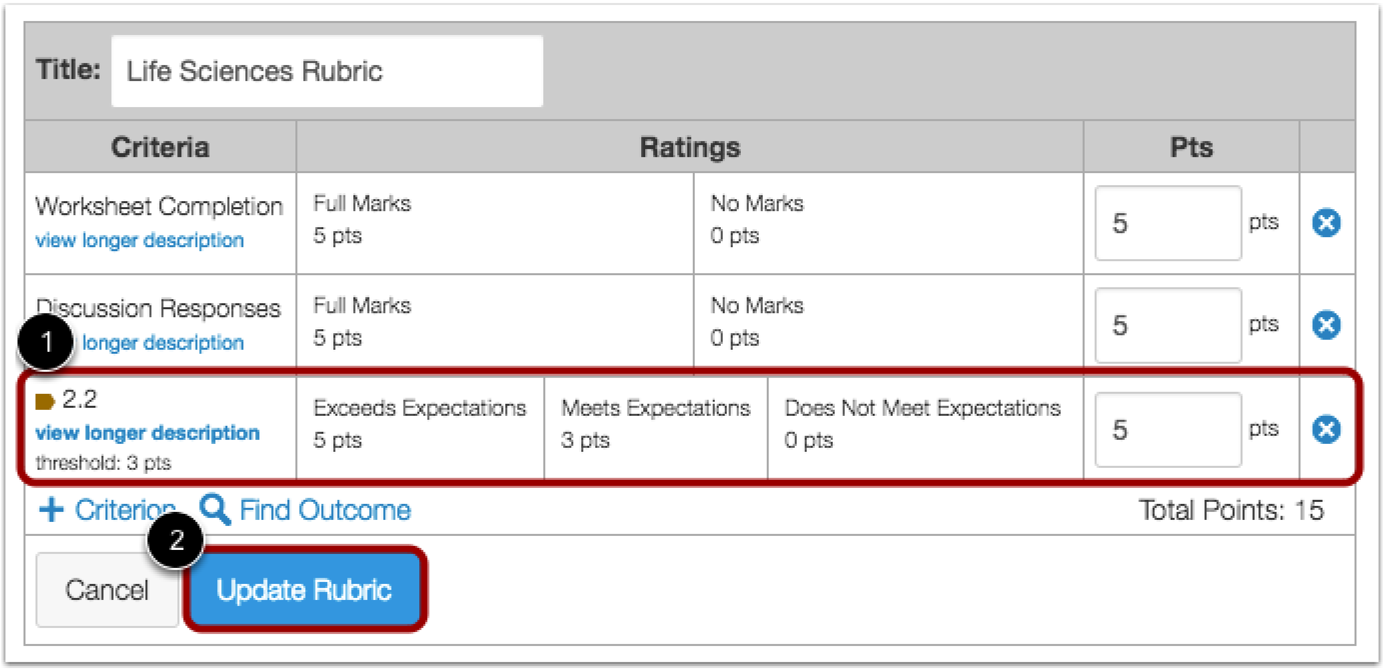
Note: Available outcomes may vary by institution.

Confirm Import



Click the **OK** button.

Update Rubric



View the aligned outcome [1]. Click the **Update Rubric** button [2].

For each course, learn how instructors can [view all aligned items](#) within an outcome.

Settings

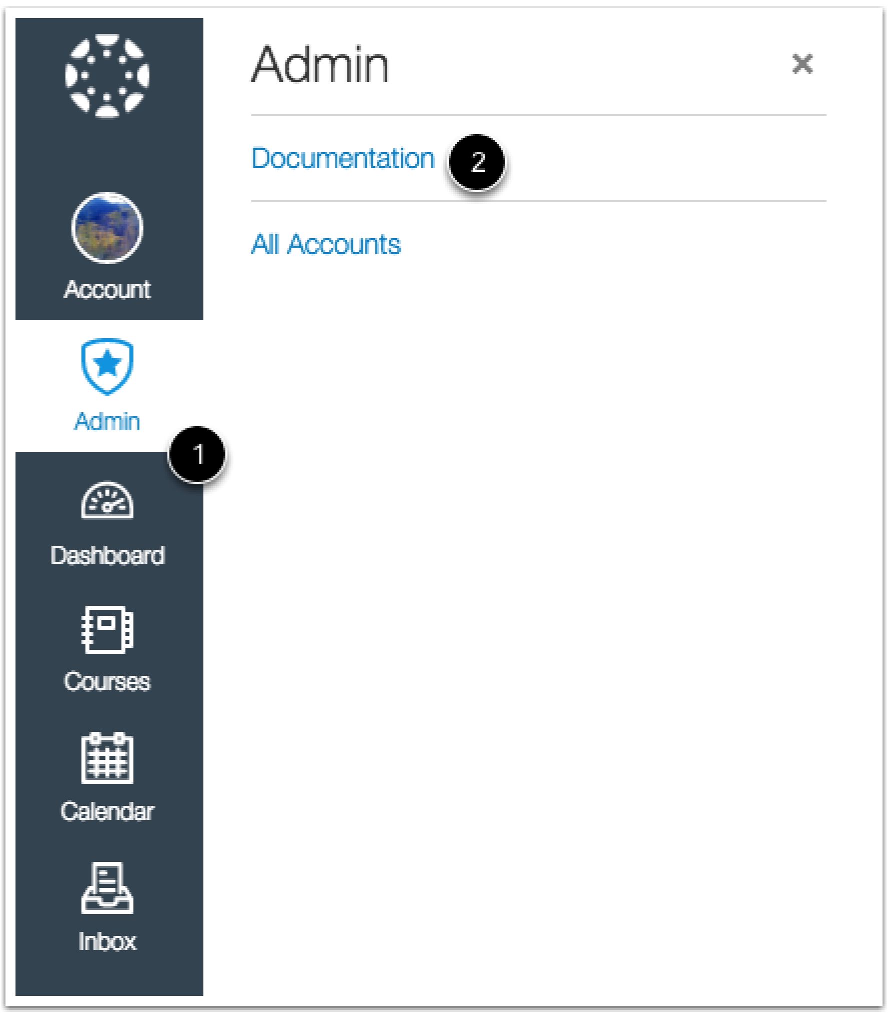
What are the Canvas settings at the account level?

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.

Note: In sub-accounts, not all account settings may be available.

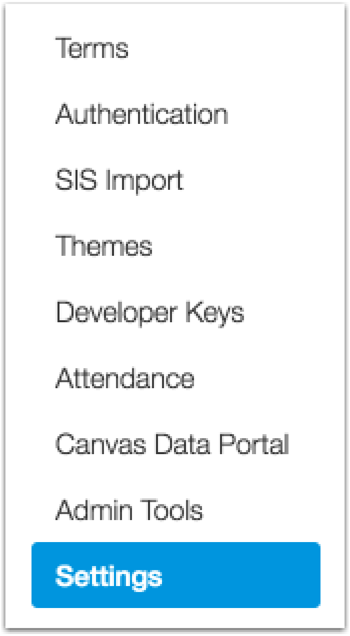
View a video about Account Settings.

Open Account



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

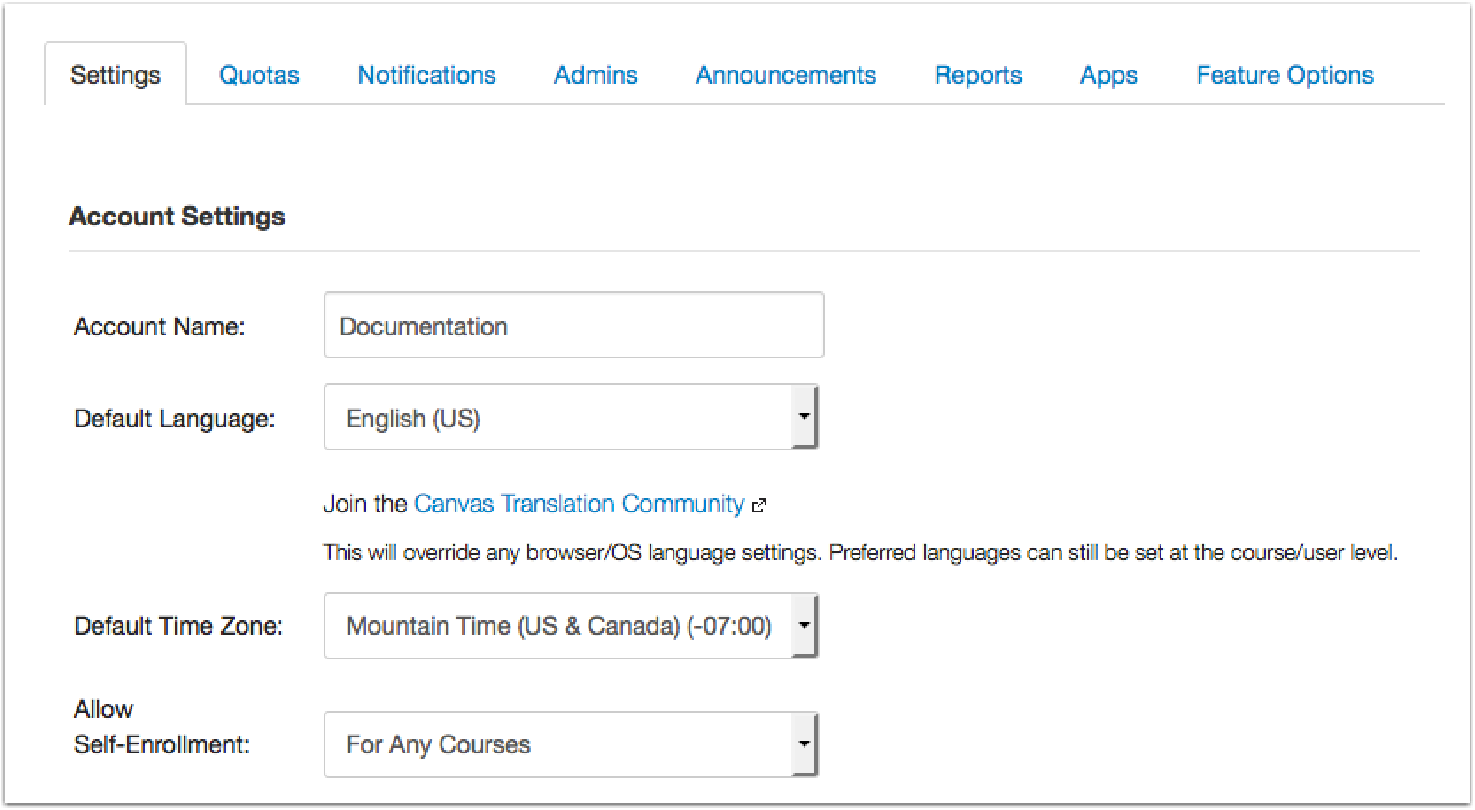
Open Settings



The settings portion of your account is only available to Canvas admins.

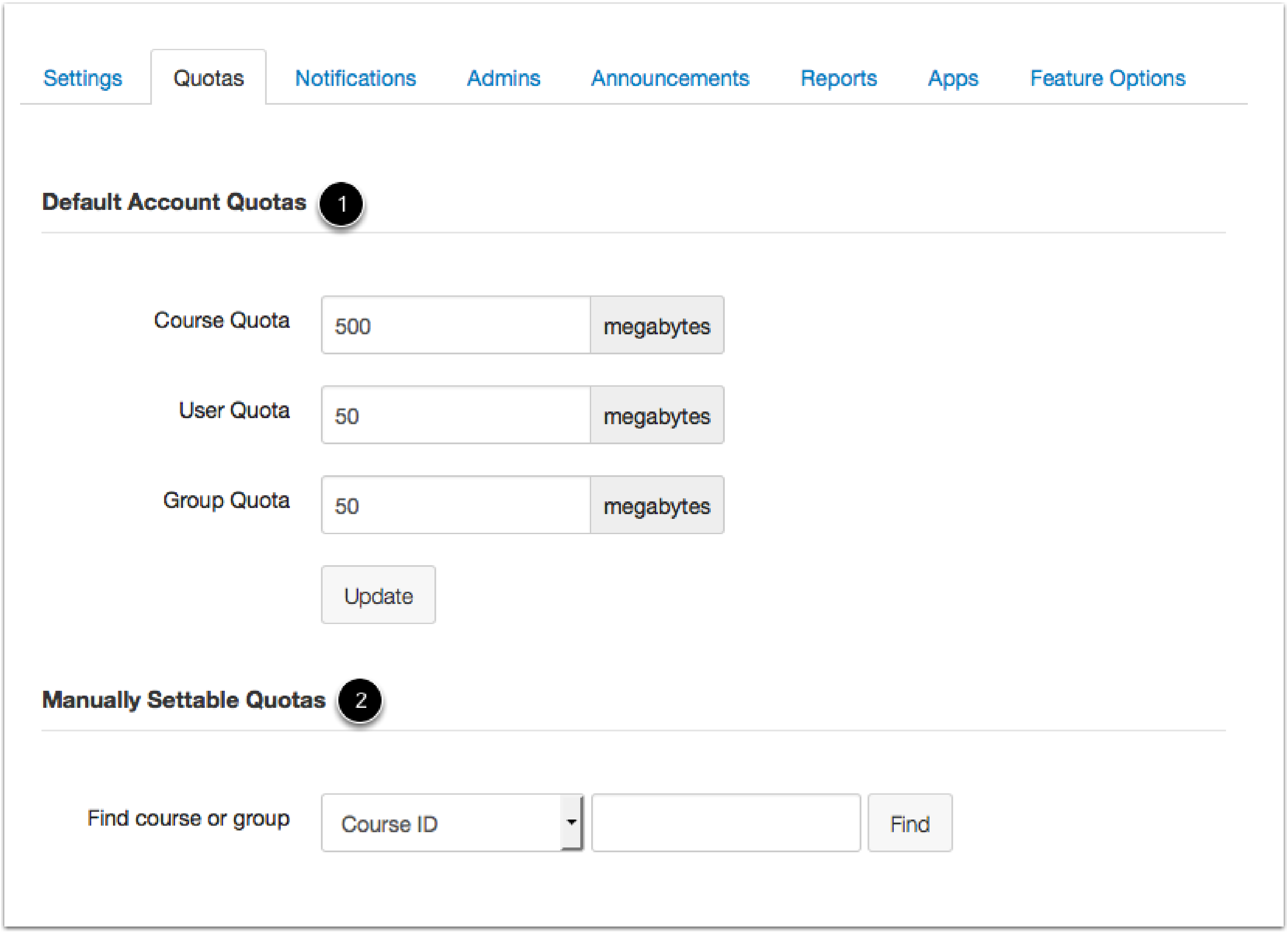
In Account Navigation, click the **Settings** link.

View Settings



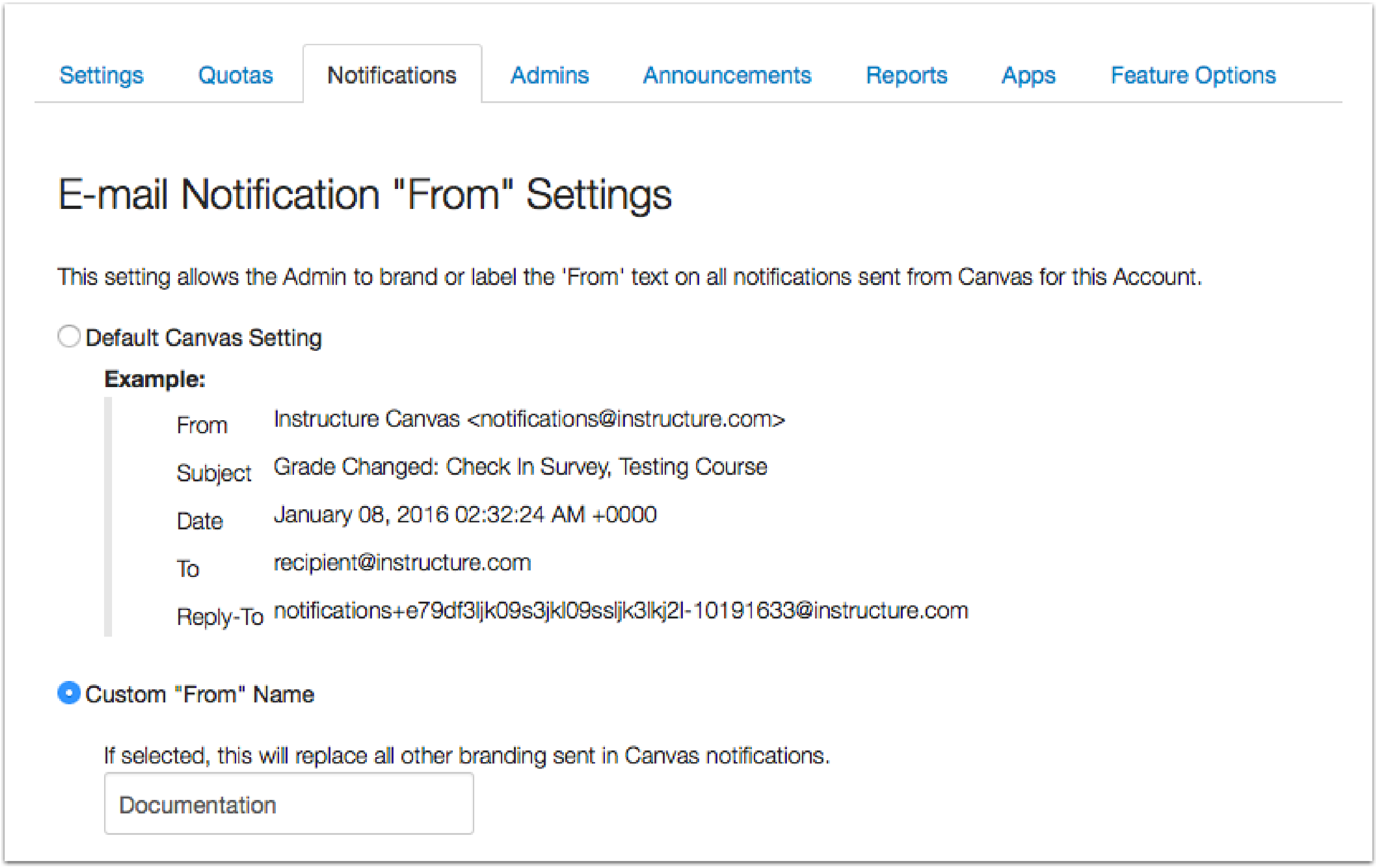
In the Account Settings tab, you can specify settings for the entire account. This tab includes several sections that you can manage including Account Settings, IP Address Filters, Features, Global JavaScript and CSS, Custom Help Links, Enabled Web Services, and permissions for who can create new courses.

View Quotas



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].

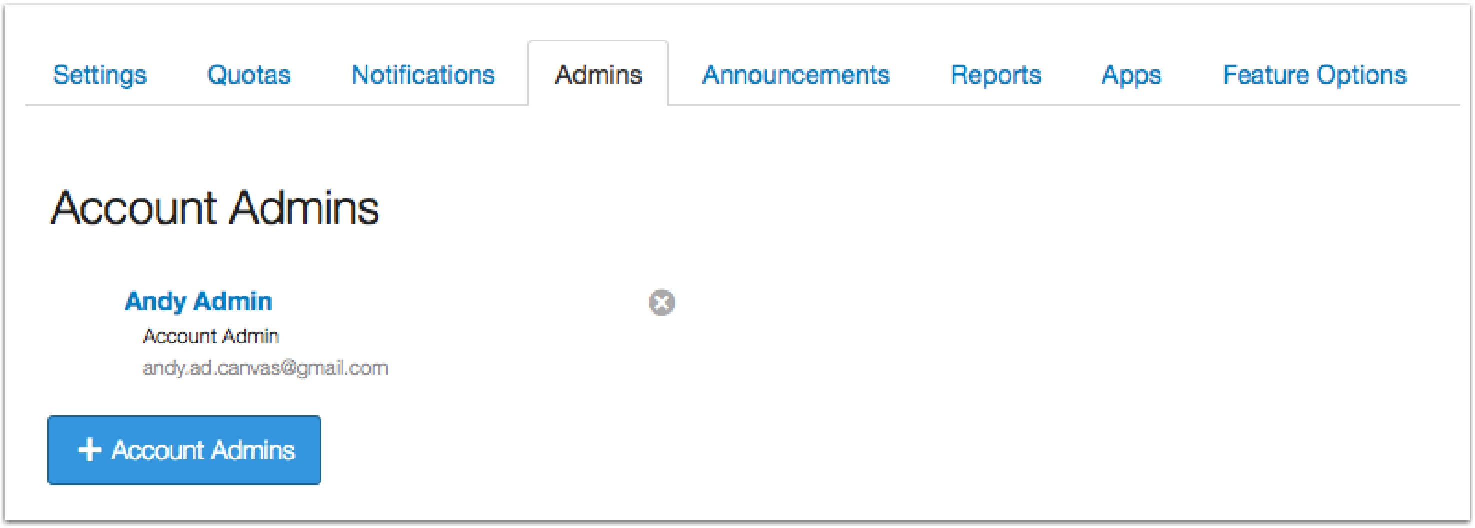
View Notifications



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.

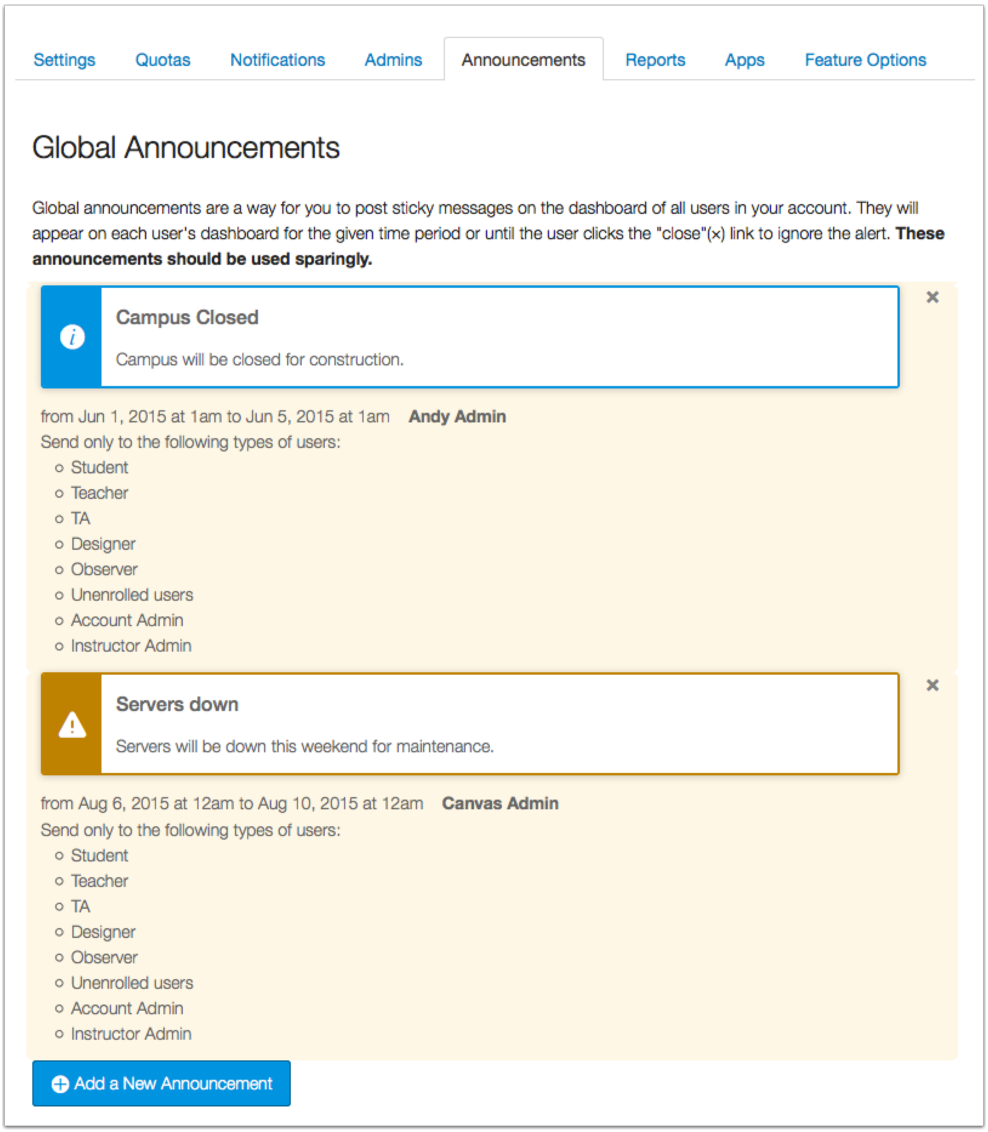
You can also warn users about notifications sent to external services; adding a non-institution based email address may result in the exposure of sensitive content.

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.

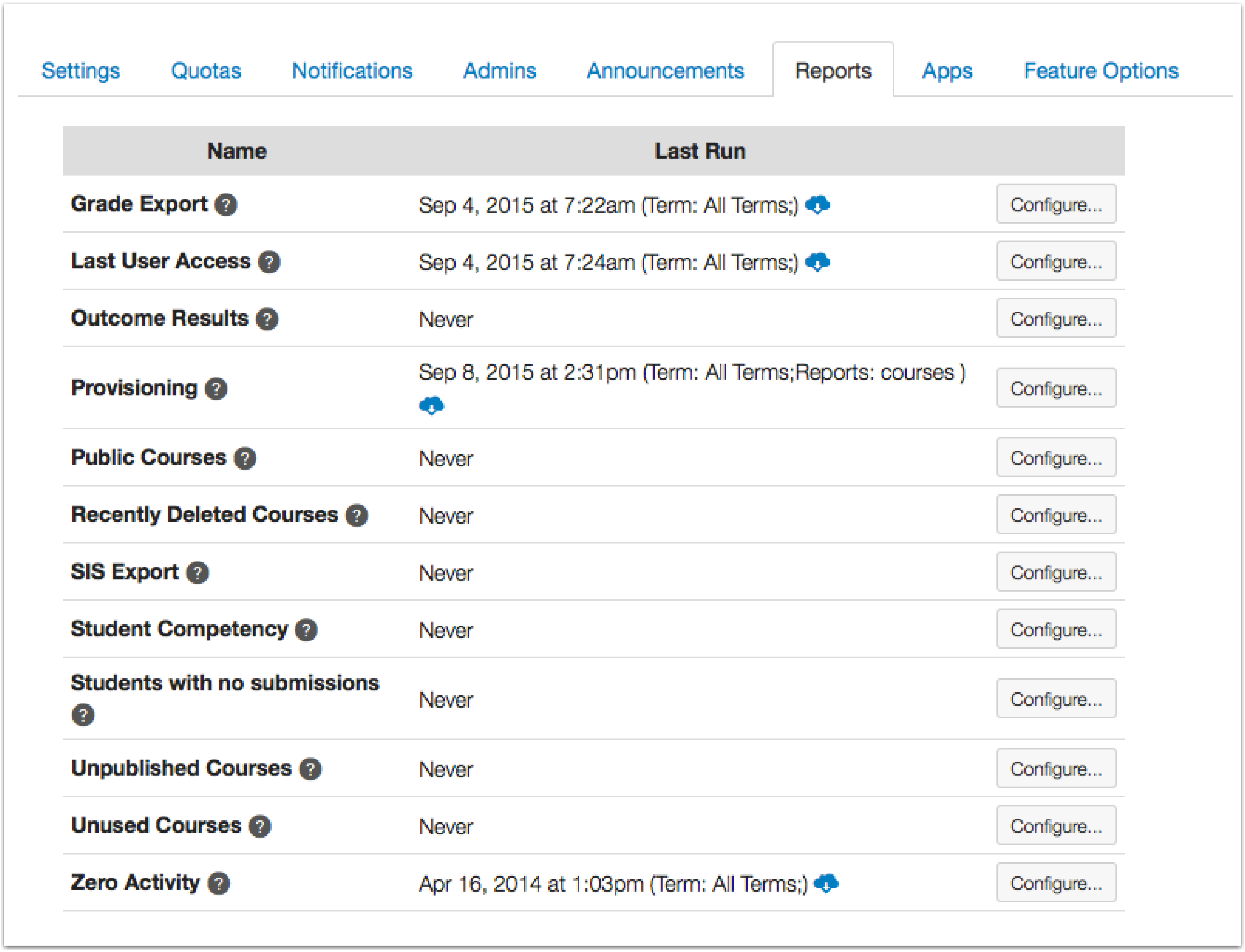
View Announcements



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.

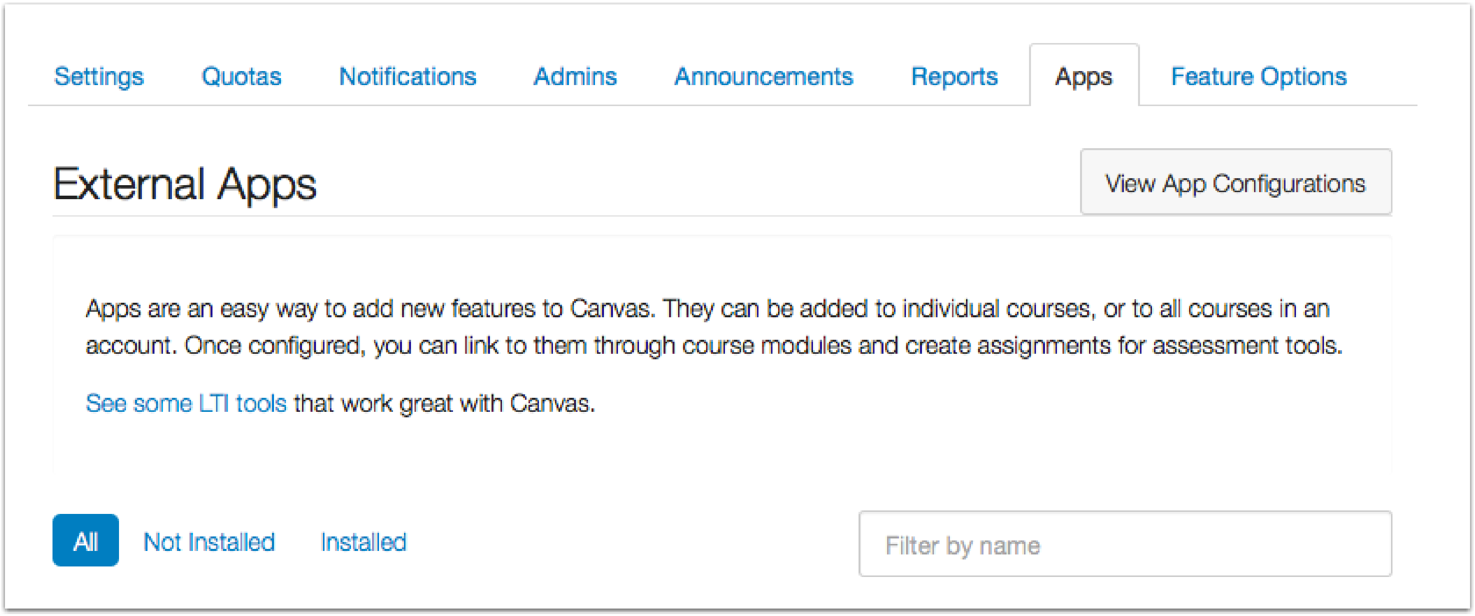
Note: Only top-level account admins can send global announcements. Global announcements are not available in sub-accounts.

View Reports



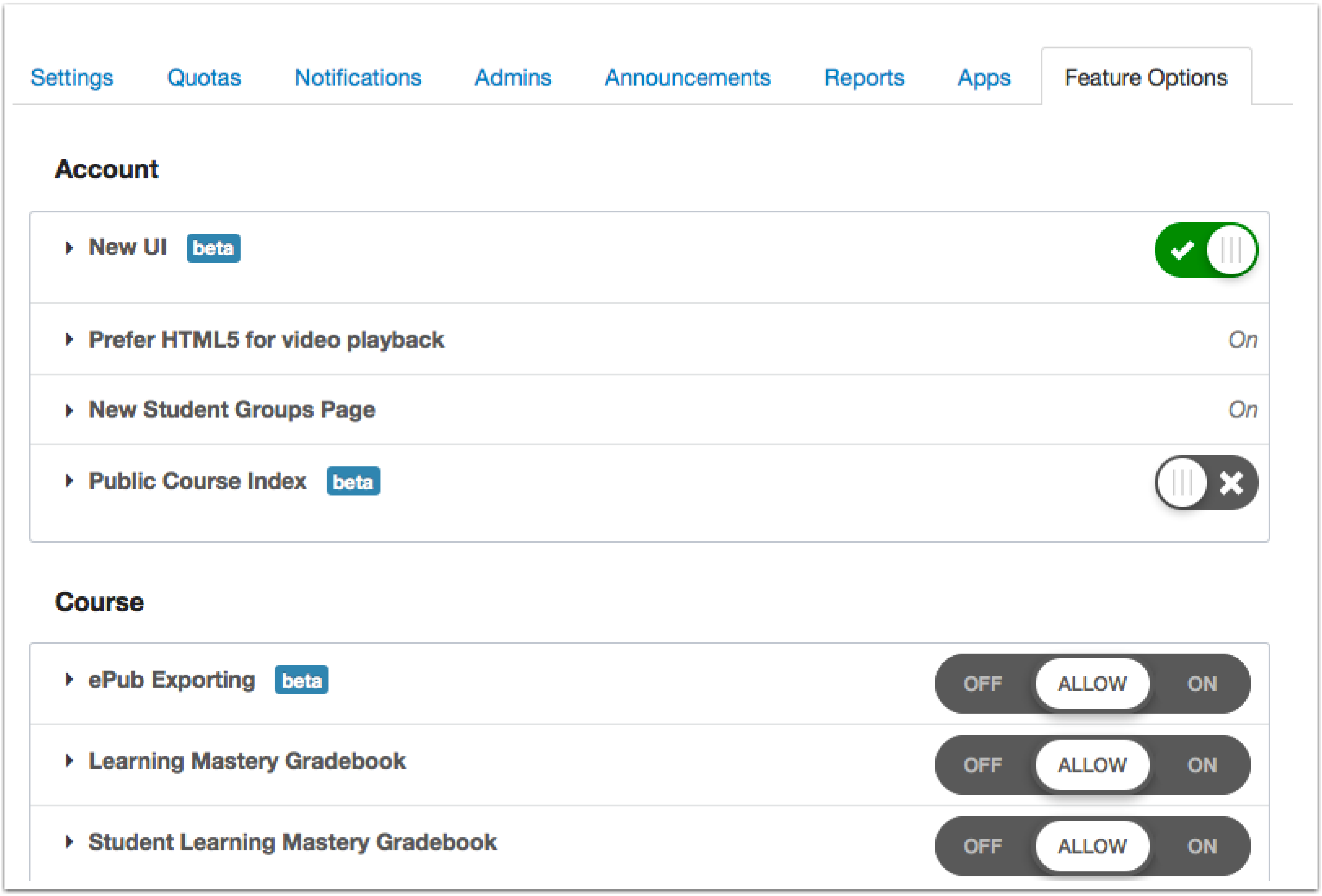
The Reports tab is where custom reports will appear after you design them. There are many more reports available in Canvas, they just aren't listed on this page. They are available in context. Quiz reports, for example, are available from the quiz page itself. User reports are available on the user's profile page. Learn more about Reports.

View Apps



In the Apps tab, you can view all available external learning tools in Canvas. 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. Learn more about External Apps.

View Feature Options



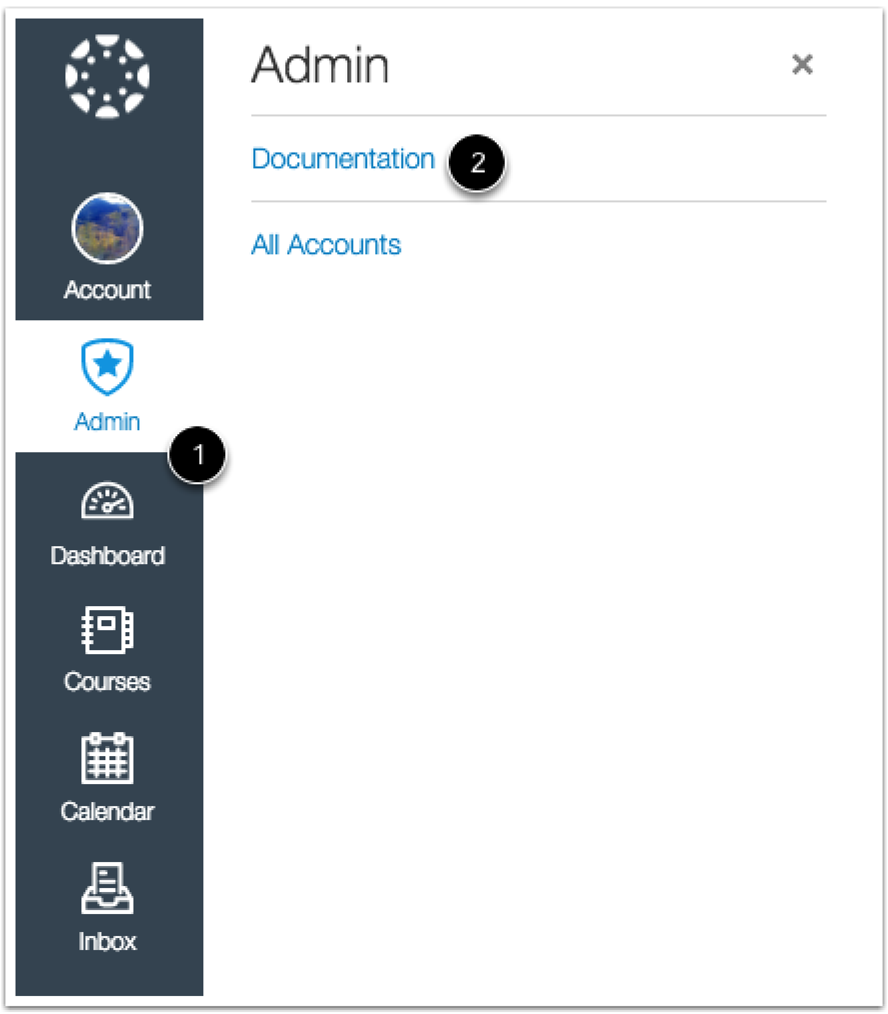
The Feature Options tab displays new features that are available to your account on both the account and course levels. Features can be turned on for the entire account, turned off for the entire account, or allowed so instructors can decide whether or not to use the feature. Instructors can enable course-allowed features on a course-by-course basis. Learn more about Feature Options.

How do I manage the options in the Account Settings tab?

As an admin, the Account Settings tab contains multiple settings you can control and change in your Canvas account.

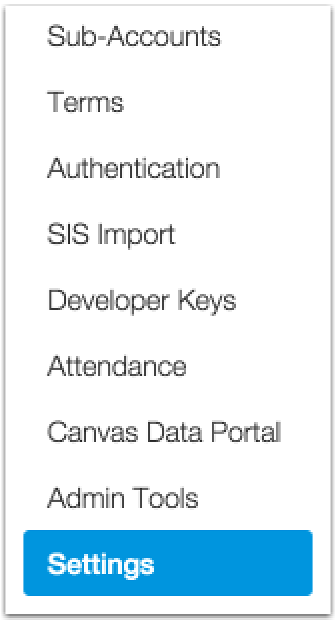
Note: Some Canvas features are not available in Account Settings and must be managed by a Customer Success Manager. Such major features include ePortfolios, SIS imports, Custom CSS/JS overrides, Scheduler, and Profiles. Please contact your Customer Success Manager with additional questions about Canvas features.

Open Account



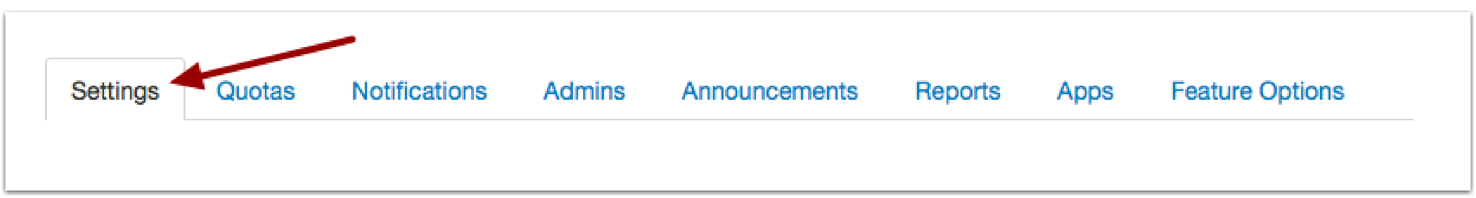
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



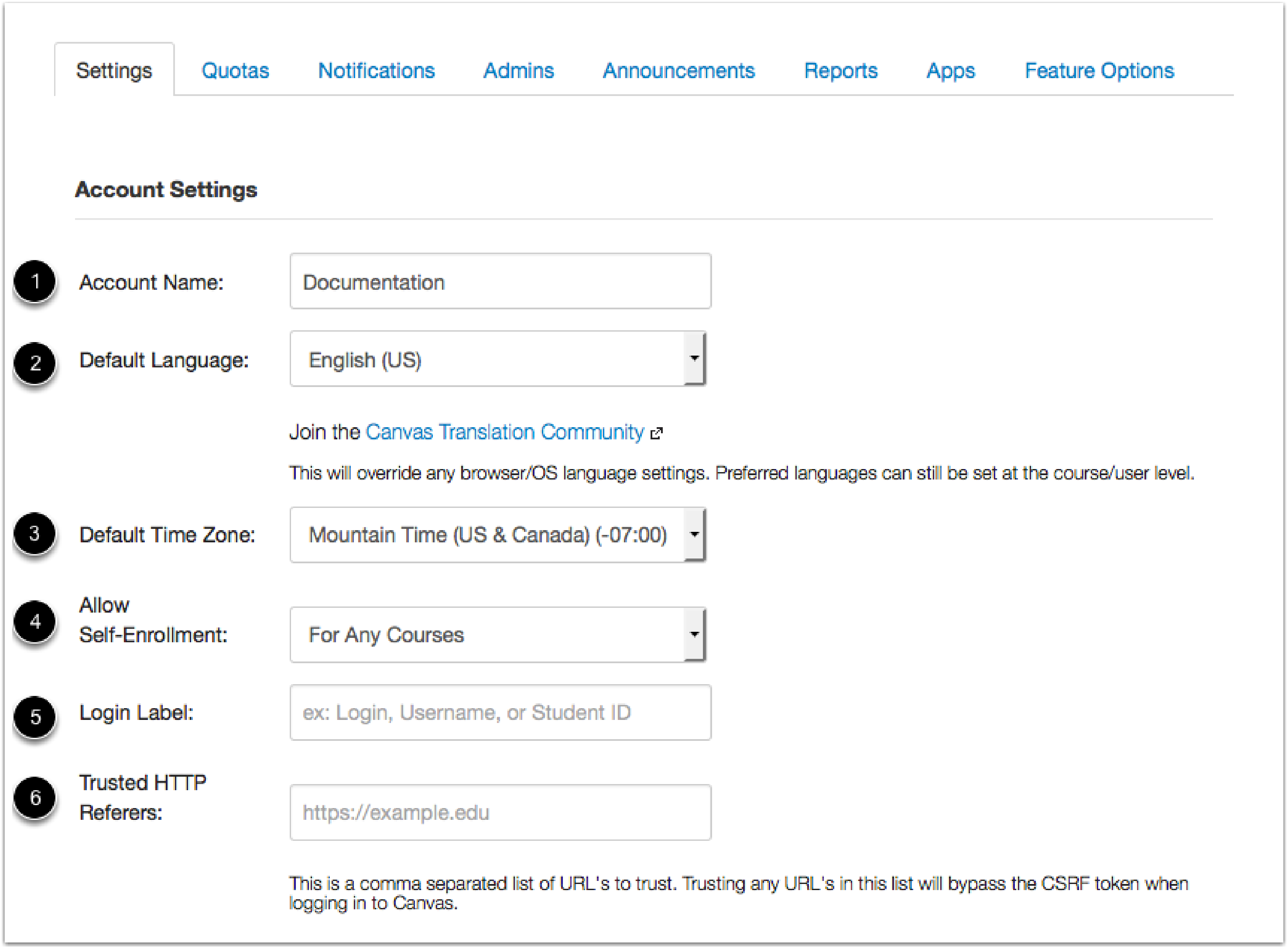
In Account Navigation, click the **Settings** link.

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

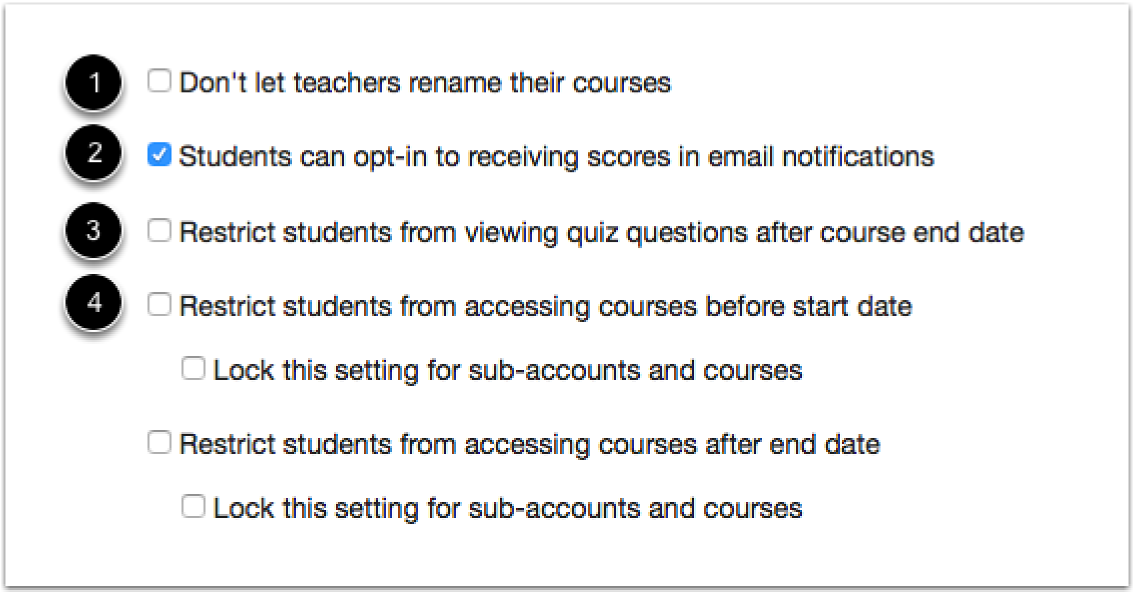


The Account Settings section allows you to specify settings for the entire account, including account name [1], default language [2], default time zone [3], and self-enrollment option [4].

If you want to customize the login field for your login page, you can customize the login label [5]. Note: This feature is now available in the Authentications Page as part of SSO Settings.

You can also specify trusted URLs at the root account [6]. This option allows accounts to have custom login pages hosted on different domains but still keep the authenticity token.

View Restriction Settings



You can also allow or restrict four options for the entire account:

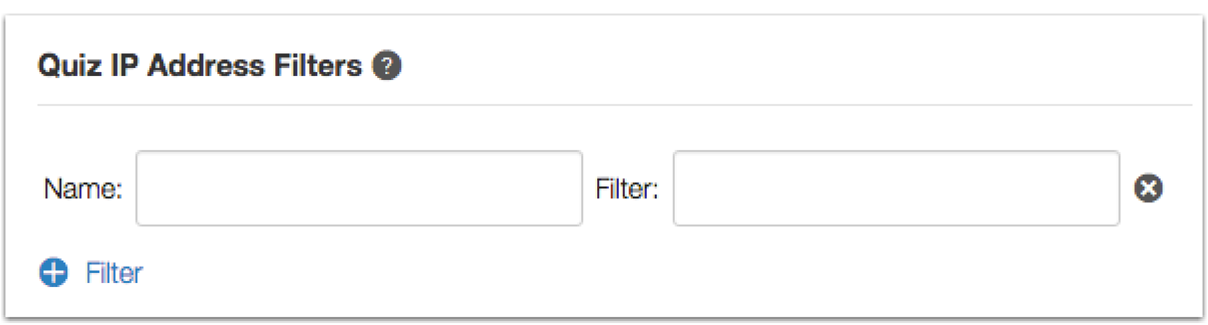
If you don't want teachers to be able to rename their courses, select the **Don't let teachers rename their courses** checkbox [1].

To allow students to opt-in to receive scores as part of grading notifications, select the **Students can opt-in...** checkbox [2]. When this option is enabled, the 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.

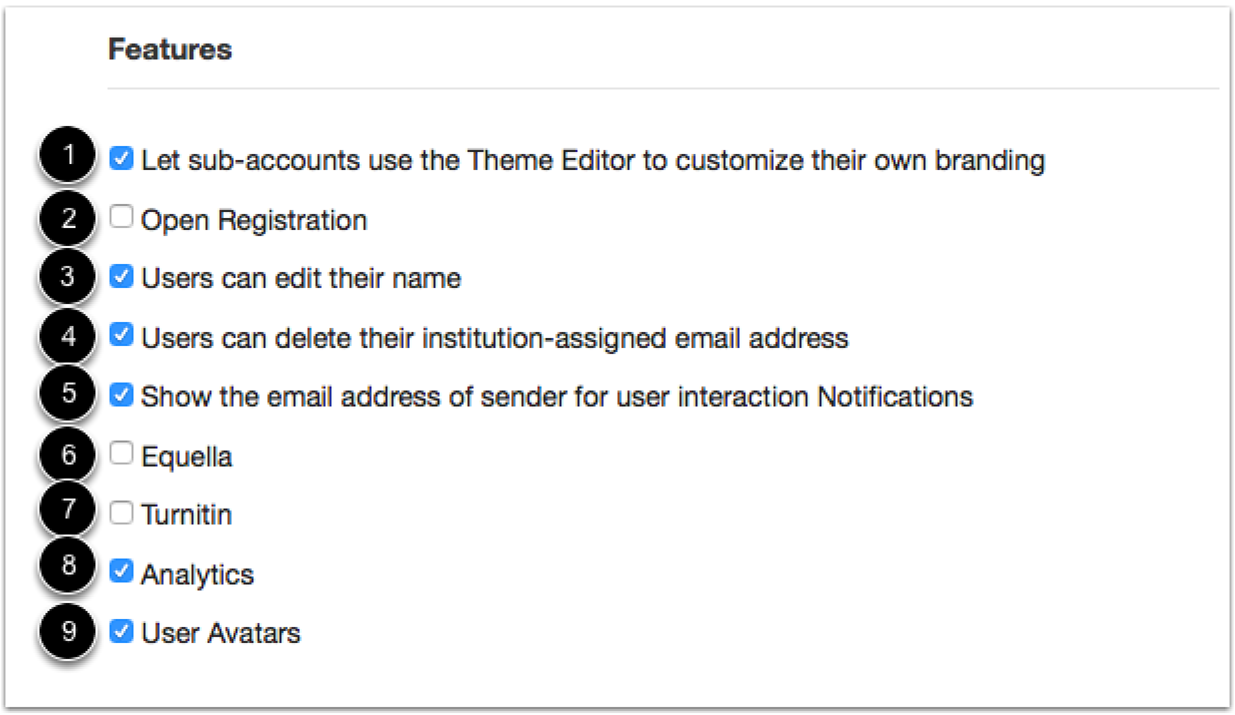
View Quiz IP Address Filters



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



The Features section lets you enable or disable specific built-in Canvas functionality.

To allow sub-accounts 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].

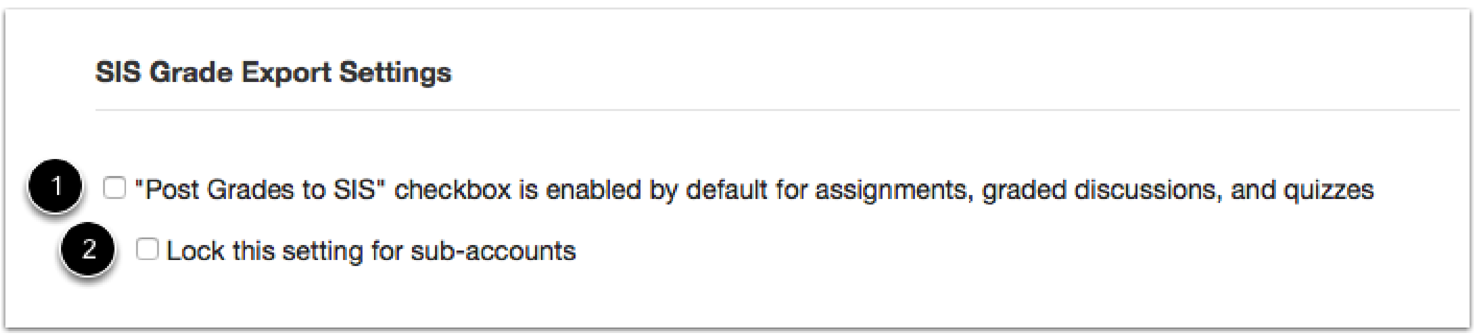
To allow users to integrate assignment submissions with the Turnitin plugin, select the **Turnitin** checkbox [7]. *The Turnitin plugin will be deprecated at the end of 2016; new integrations should be set up through the [Turnitin LTI](#) instead.*

To enable [analytics](#) for the account, select the **Analytics** checkbox [8].

To allow users to upload a [profile picture](#) in their user accounts, select the **User Avatars** checkbox [9]. When this feature is enabled, you can [manage profile pictures](#) for all users. Note: This feature is independent of the Profiles feature, which must be enabled by a Customer Success Manager.

Note: Sub-account admins can only enable Equella, Turnitin, Analytics, and User Avatars.

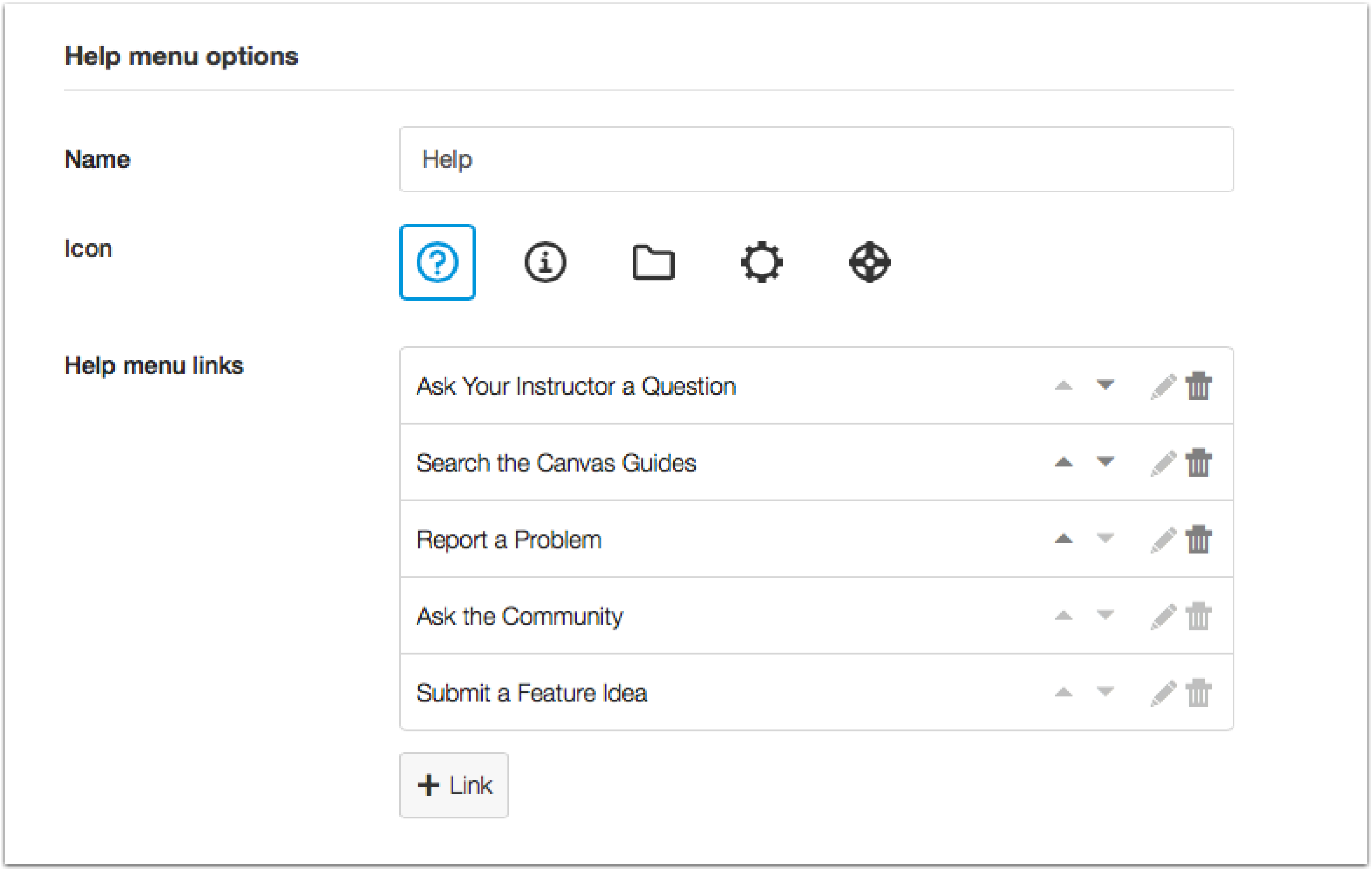
View SIS Grade Export Settings



If you've integrated your account with a student information system (SIS), you can [configure SIS submissions](#) for your entire account. 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.

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]. Instructors can still individually manage assignments in their courses to remove any assignments, graded discussions, or quizzes that they do not want to send to your SIS.

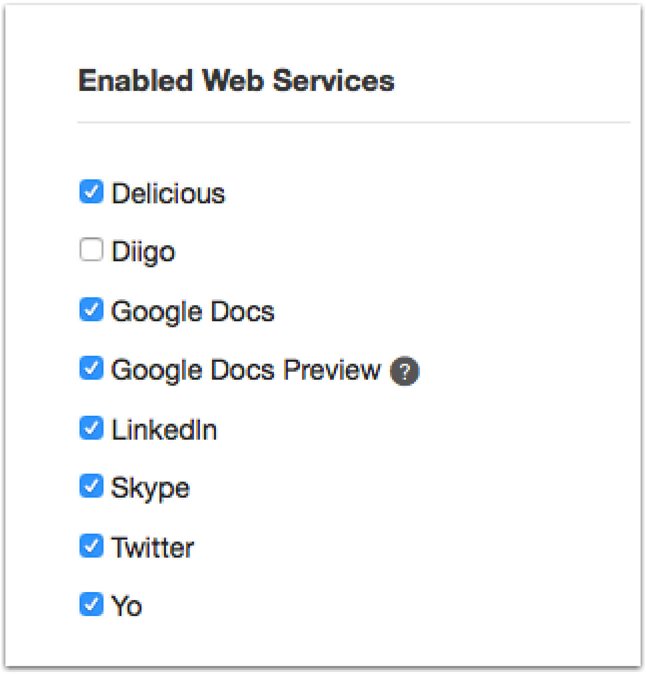
View Help Menu Options



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.

Note: Sub-account admins cannot customize links for the help dialog box by default.

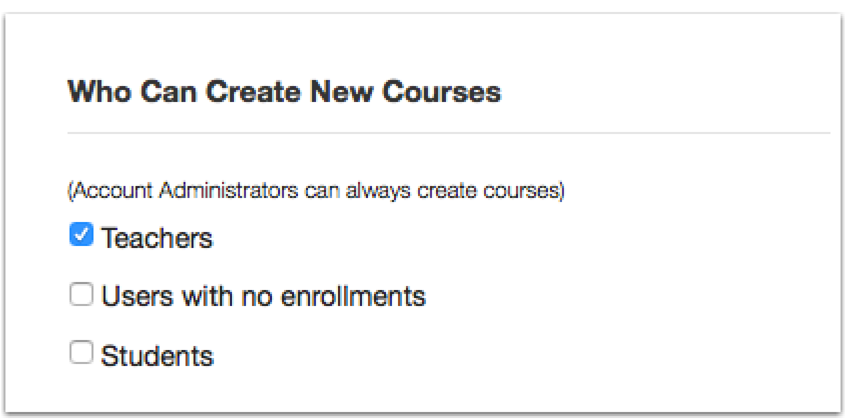
View Web Services



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: Sub-account admins cannot enable web services by default.

View Who Can Create New Courses

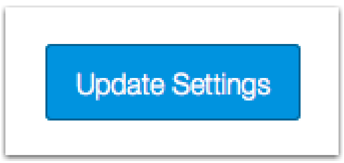


You can choose who can create new courses within your account.

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.

Note: Sub-account admins cannot choose who can create new courses by default.

Update Settings

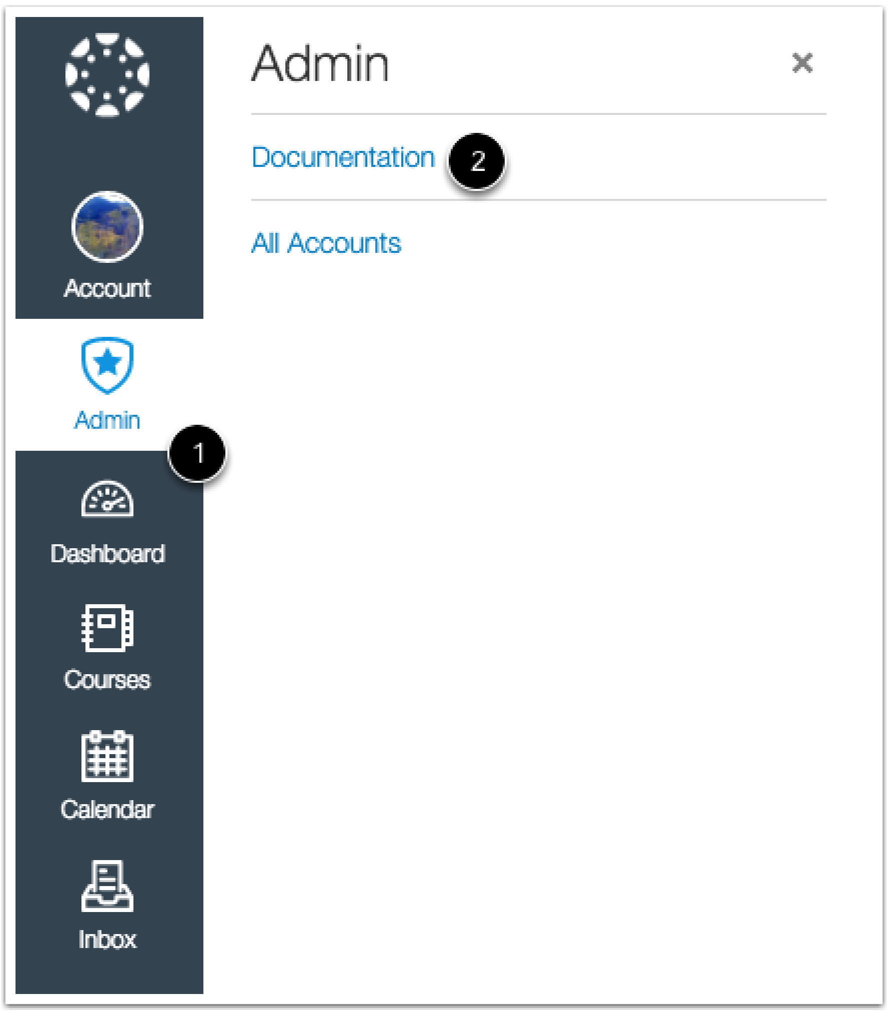


Click the **Update Settings** button.

How do I set storage quotas for an account?

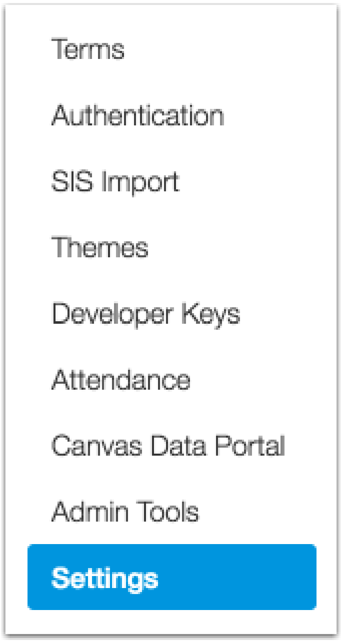
In the Quotas tab, you can set default account quotas for courses, users, and groups. You can also set quotas by Course ID or Group ID.

Open Account



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

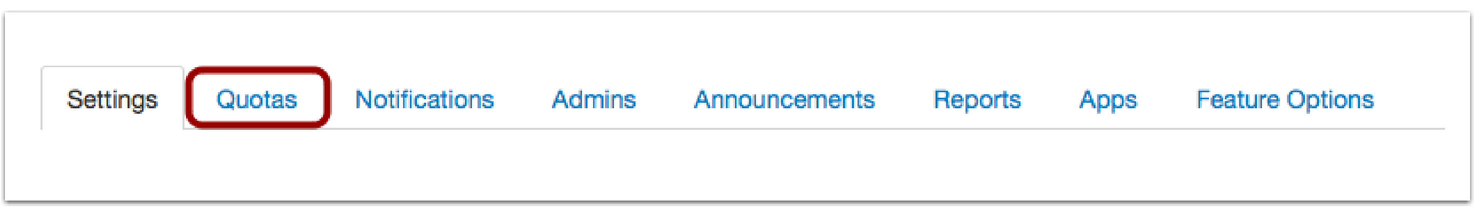
Open Settings



The settings portion of your account is only available to Canvas admins.

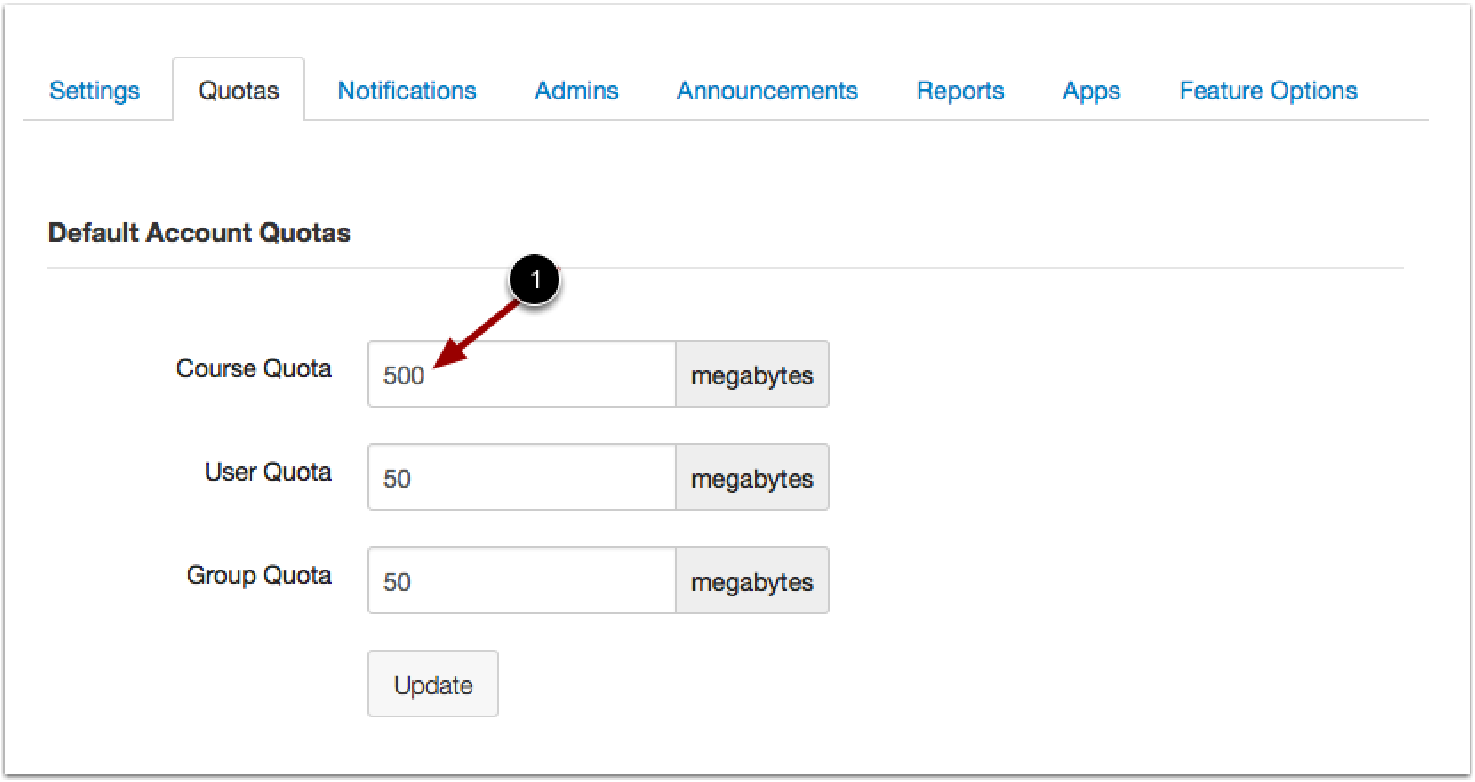
In Account Navigation, click the **Settings** link.

Open Quotas



Click the **Quotas** tab.

View Default Account Quotas



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.

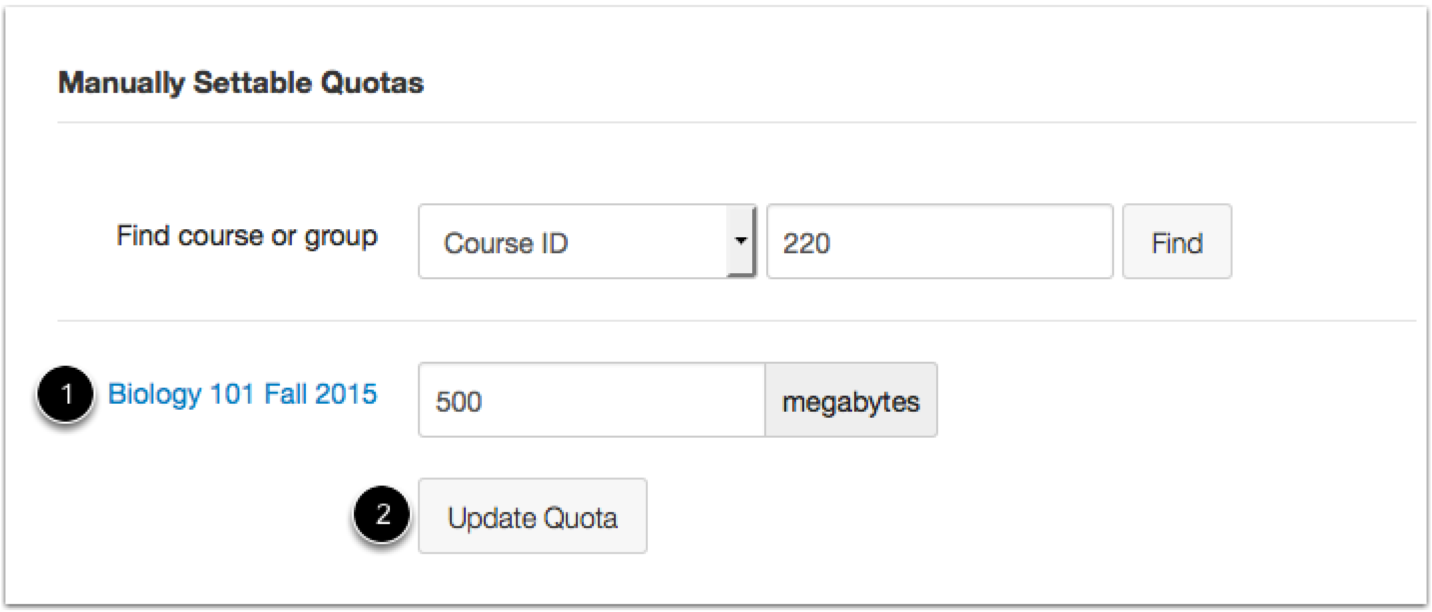
Click the **Update** button [2].

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 to a user from all their associated accounts. 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 message also indicates which account or subaccount sent the Global Announcement.

You can create five different types of announcements: warning, error, information, question, or calendar. To learn more about the announcement types and how they appear to users, view the Global Announcement Types PDF.

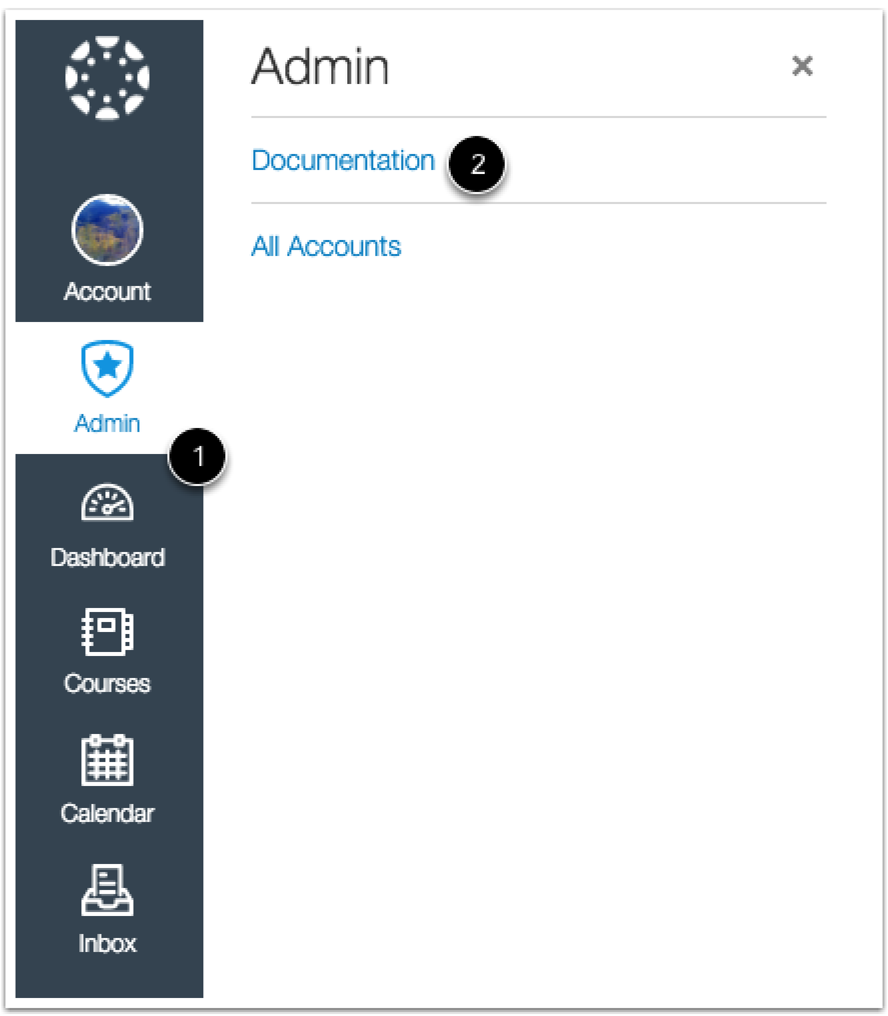
Global Announcements can be shown during a specific date range. Once an announcement passes its start date, the announcement is immediately visible in each user's dashboard and can be dismissed by the user.

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:

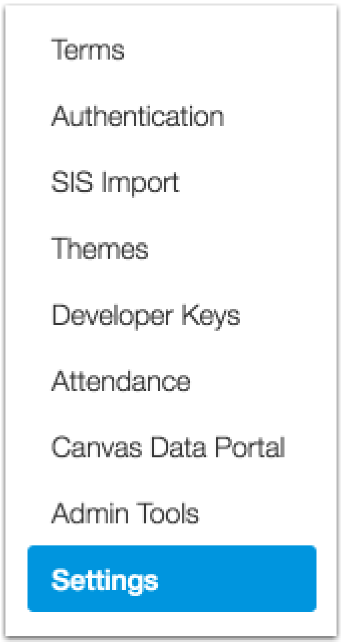
- Global Announcements do not appear in course announcements.
- When users are not enrolled in any courses, they can view announcements from the root account. They can only view sub-account announcements once they have been added to a course within the sub-account.
- For New Canvas UI users, the Theme 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.

Open Account



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

Open Settings



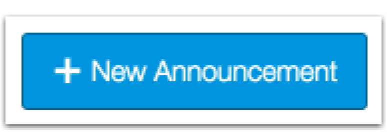
In Account Settings, click the **Settings** link.

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.

Find Announcements Tab

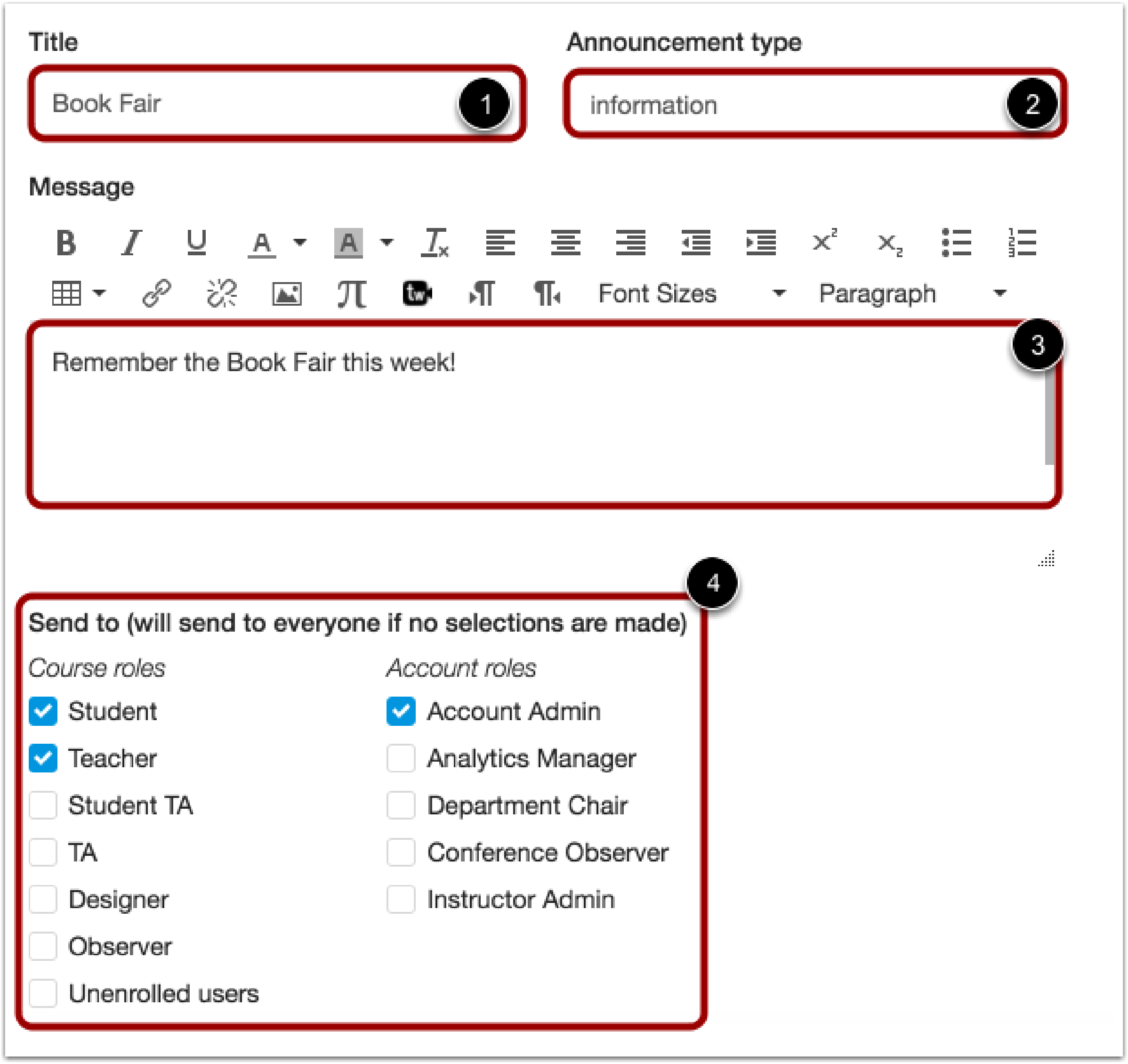
Click the **Announcements** tab.

Add a New Announcement



Click the **Add New Announcement** button.

Add Announcement Details



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.

In the **Send to** section [4], 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.

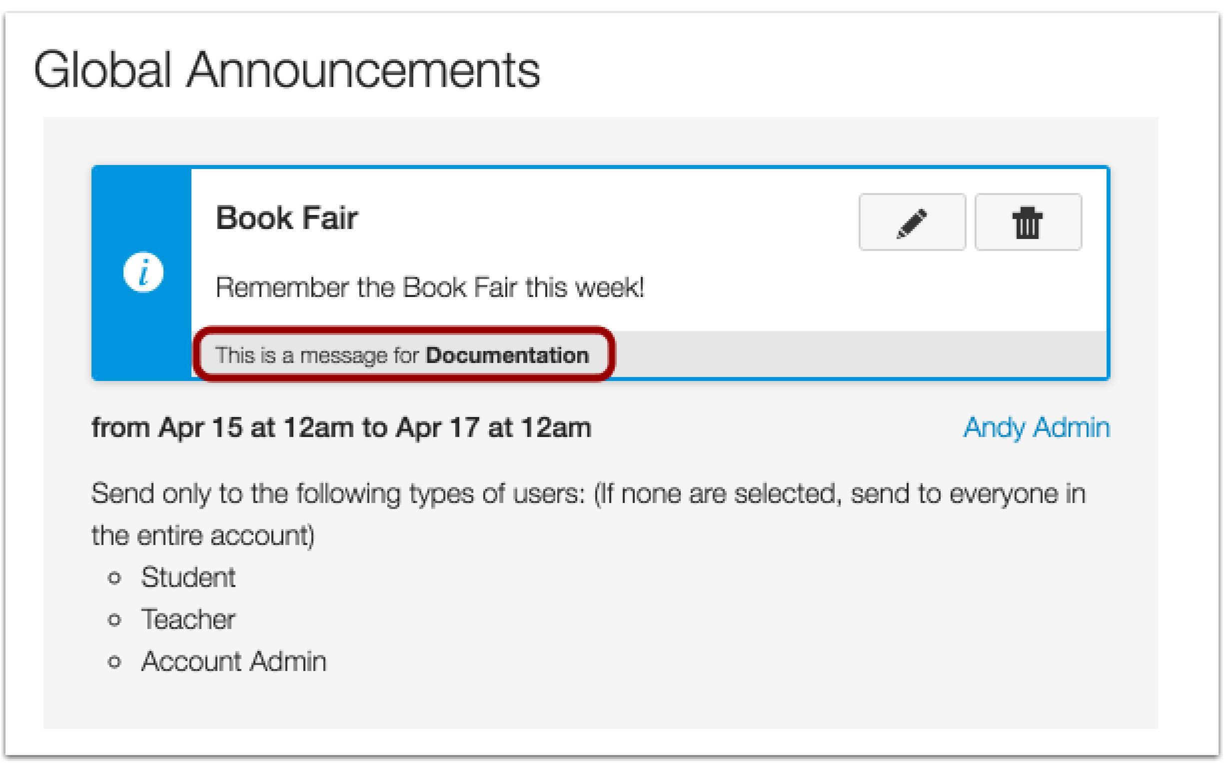
Choose Start and End Dates

Choose the start and end dates for the announcement by typing in the fields or selecting the **Calendar** icons (required).

Publish Announcement

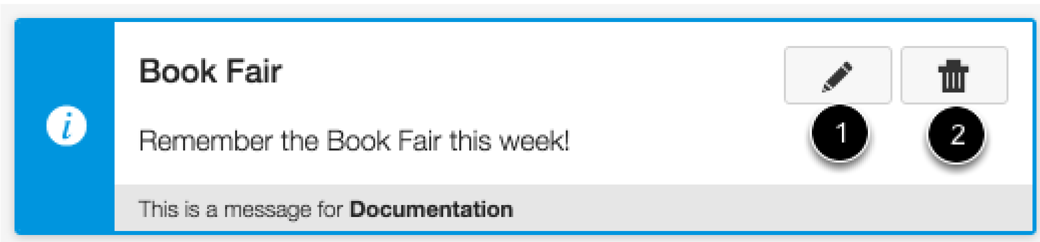
Click the **Publish Announcement** button.

View Global Announcement



View the Global Announcement. The announcement includes the name of your account or sub-account.

Manage Announcement



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 for an account?

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.

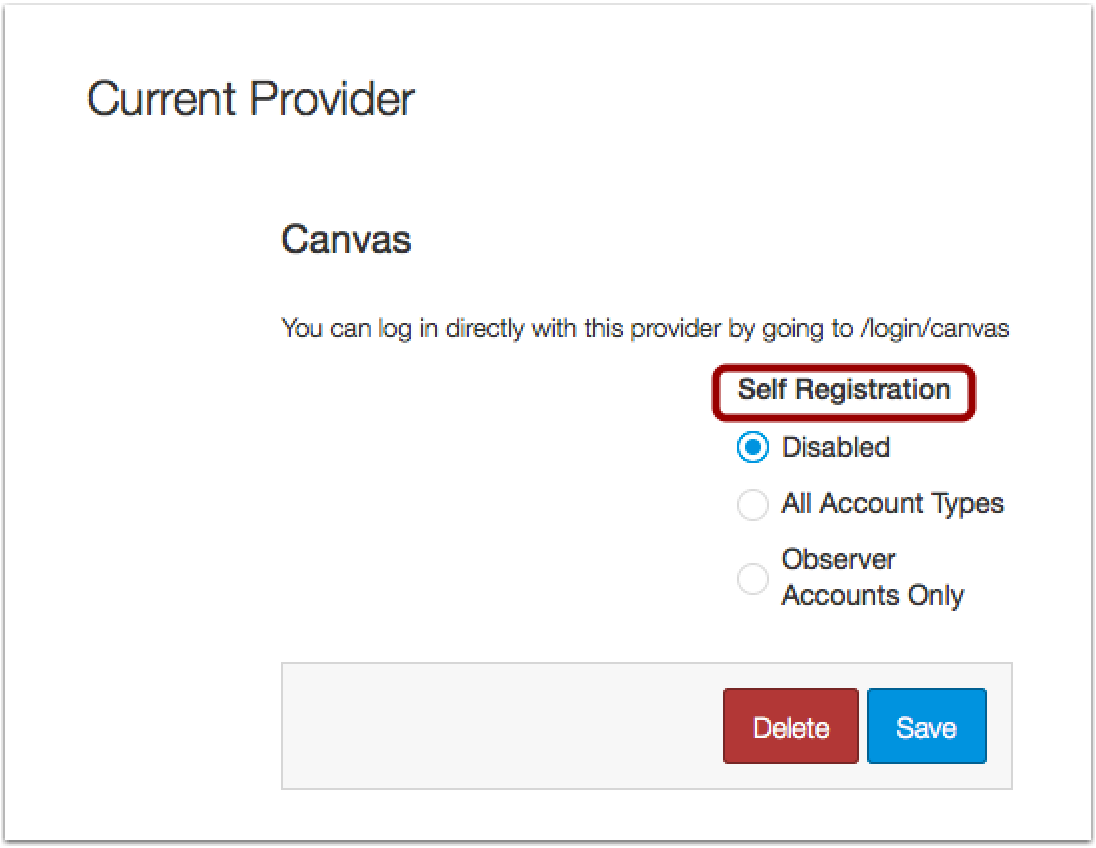
Self Enrollment

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.

Once self-enrollment has been enabled by an administrator, instructors can allow self-enrollment for their course to generate the secret URL or code to send to students.

Learn how to enable self enrollment in your account settings.

Self Registration

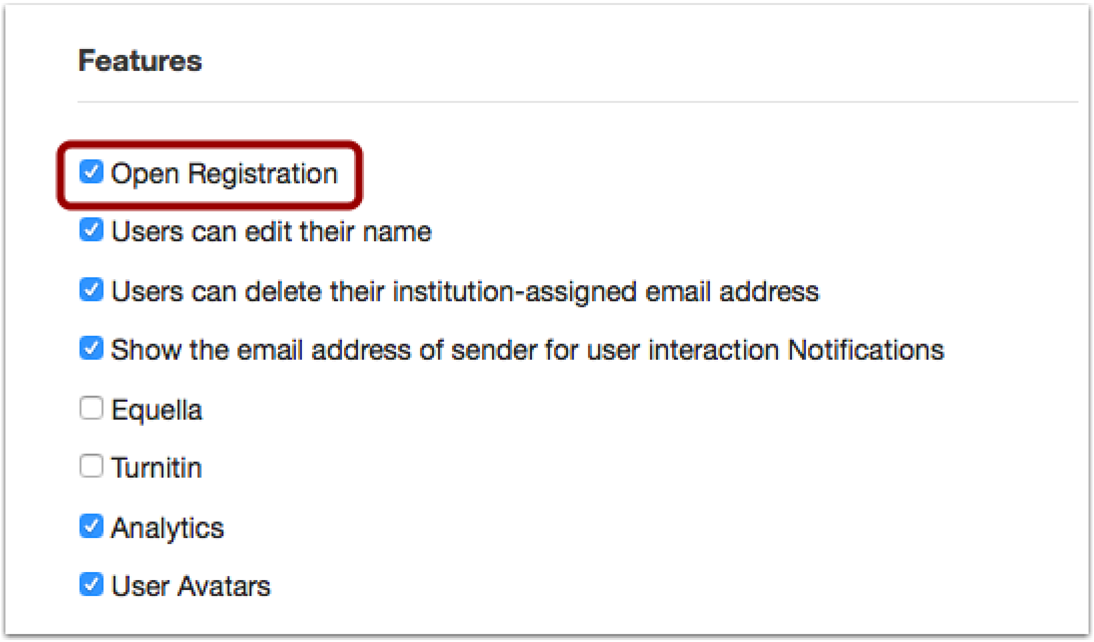


Self registration is an authentication method through Canvas that allows users without an account to create an account for themselves.

If self enrollment is enabled 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.

Learn how to enable self registration in your account authentication page.

Open Registration



Open registration allows students to be added to a course via email address, even if the students don't have a Canvas account in your institution. Students will create their account during the course enrollment process.

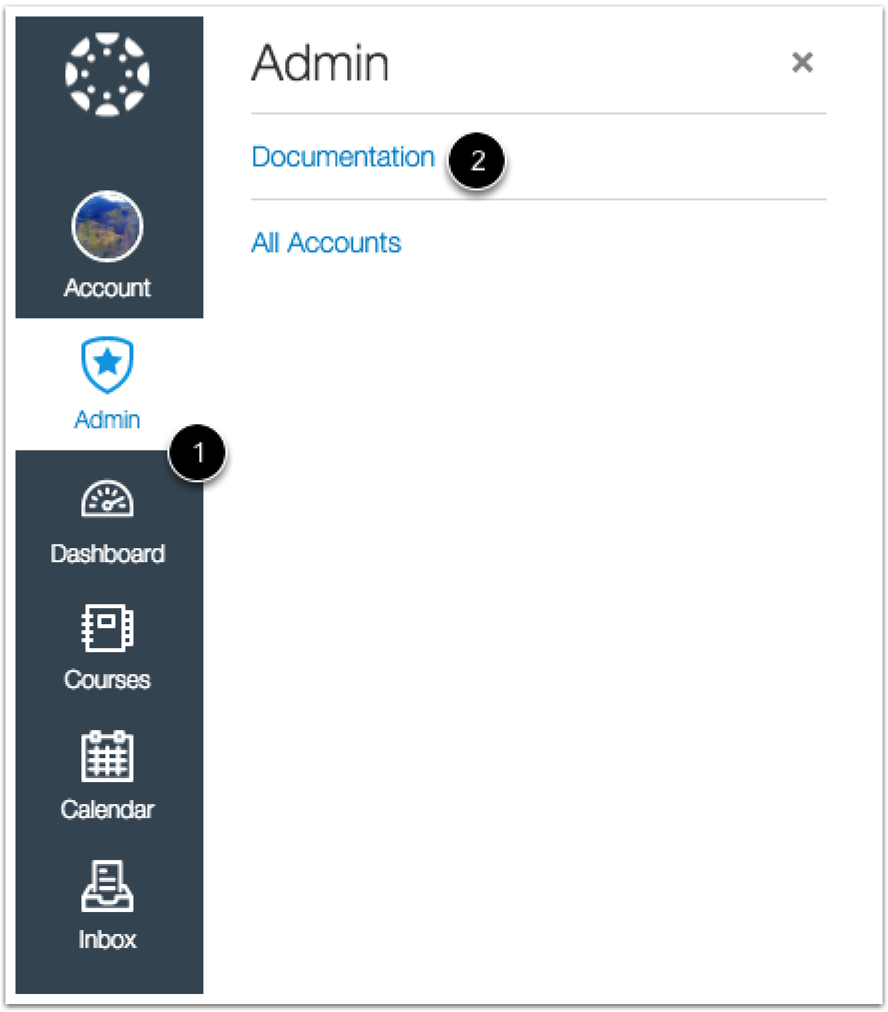
Learn how to enable open registration in your account settings.

How do I change open registration settings for an account?

Open registration allows students to be added to a course via email address without an account on that particular instance. Administrators can enable or disable open registration for the account.

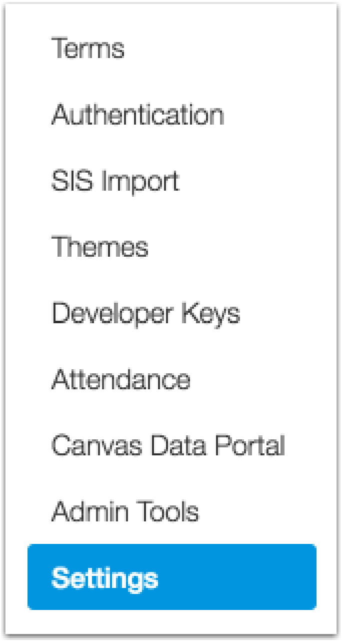
You must have administrator access for your institution to change the open registration setting for the account.

Open Account



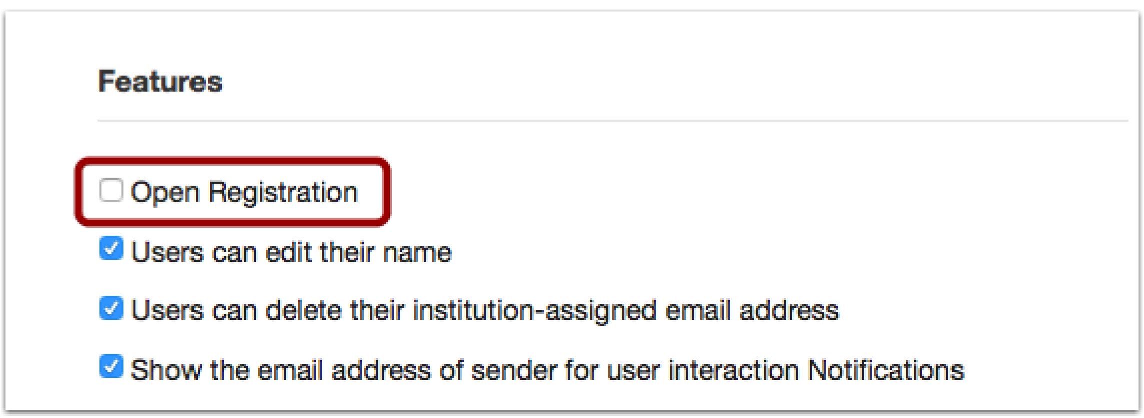
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



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

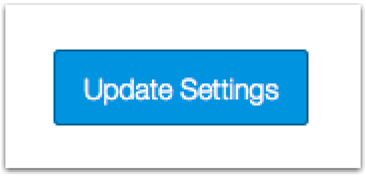
Change Open Registration



In the Settings tab under the Features heading, click the **Open Registration** checkbox**.**

Note: By default, this option is turned off.

Update Settings



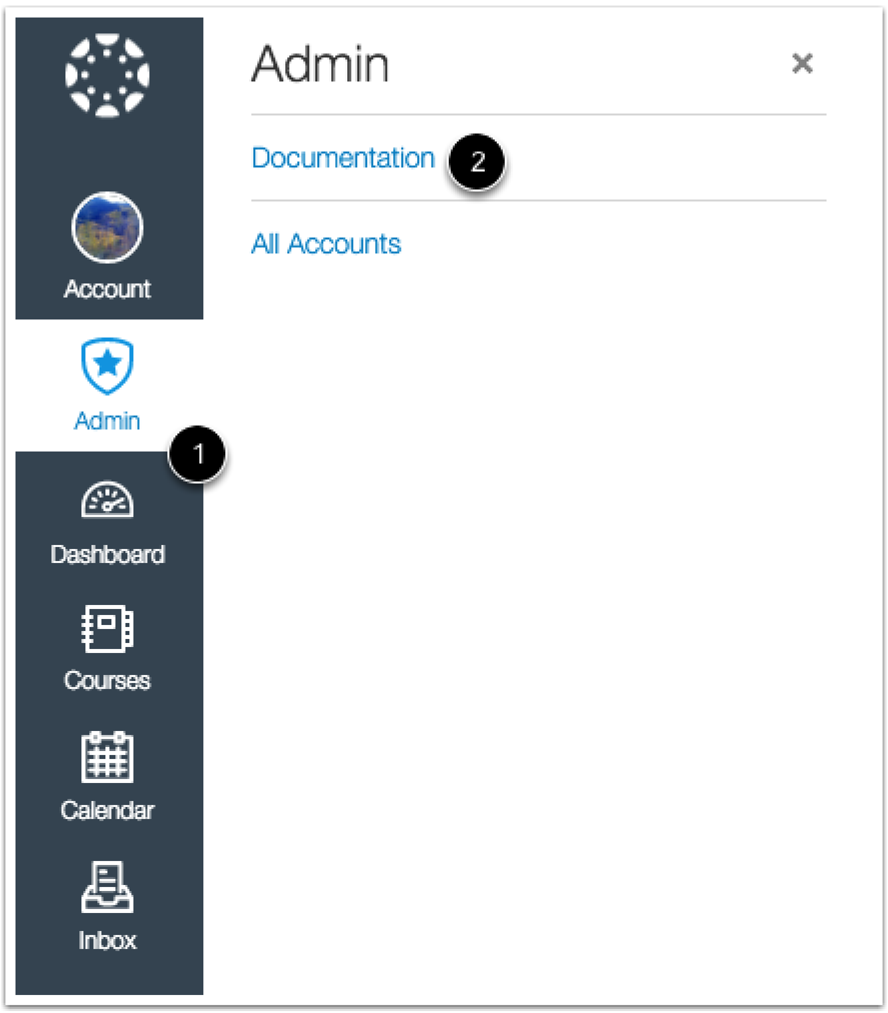
Click the **Update Settings** button.

How do I change self-enrollment settings for an account?

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.

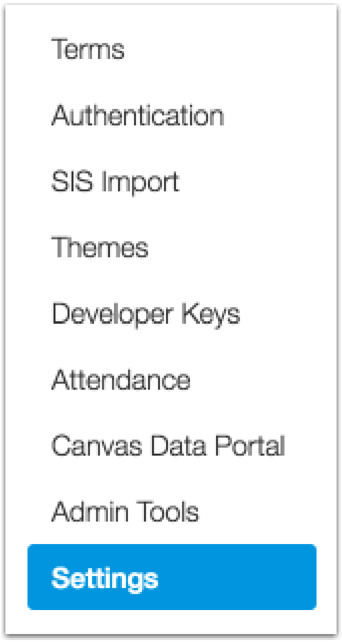
Once enabled, learn how instructors enable self-enrollment in their courses.

Open Account



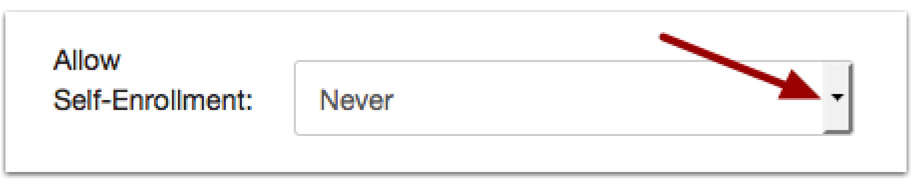
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Settings



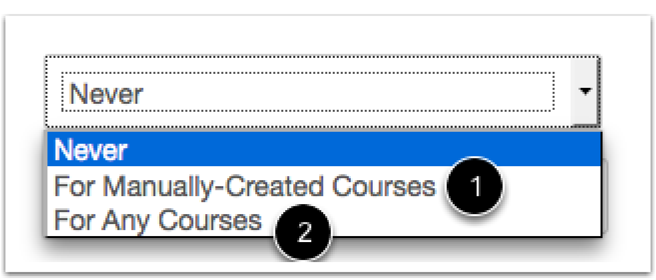
In Account Settings, click the **Settings** link.

Allow Self-Enrollment



In the Settings tab, locate the Allow Self-Enrollment drop-down menu.

Set Self-Enrollment

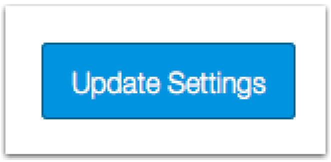


Select the type of self-enrollment permission you want to enable.

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

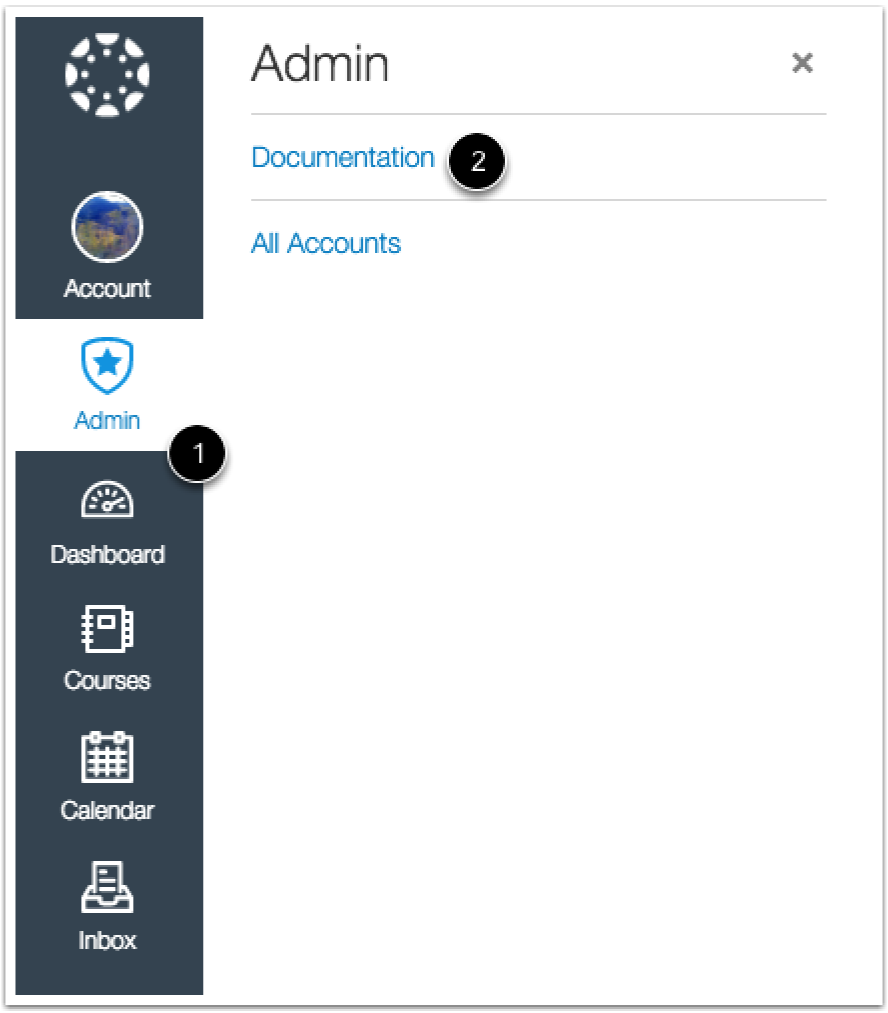


Click the **Update Settings** button.

How do I change the sender name in account email notifications?

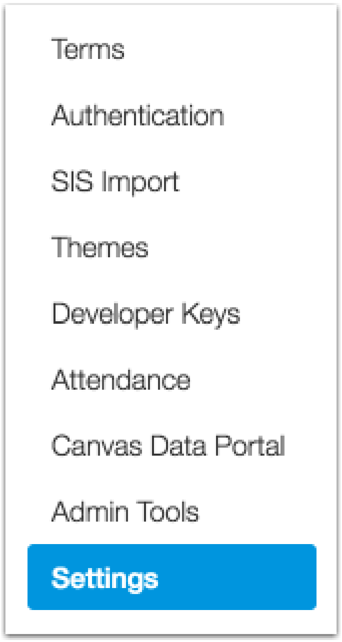
Canvas gives administrators the option to set up a custom "From" text field for Canvas notifications. This custom text can be your institution name or whatever sender information you would like to use. Using the custom text field helps student identify notification emails more easily and improves the quality of student-instructor interaction.

Open Account



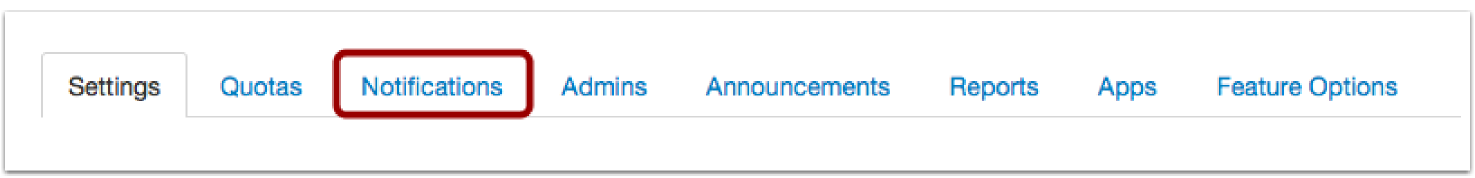
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Settings



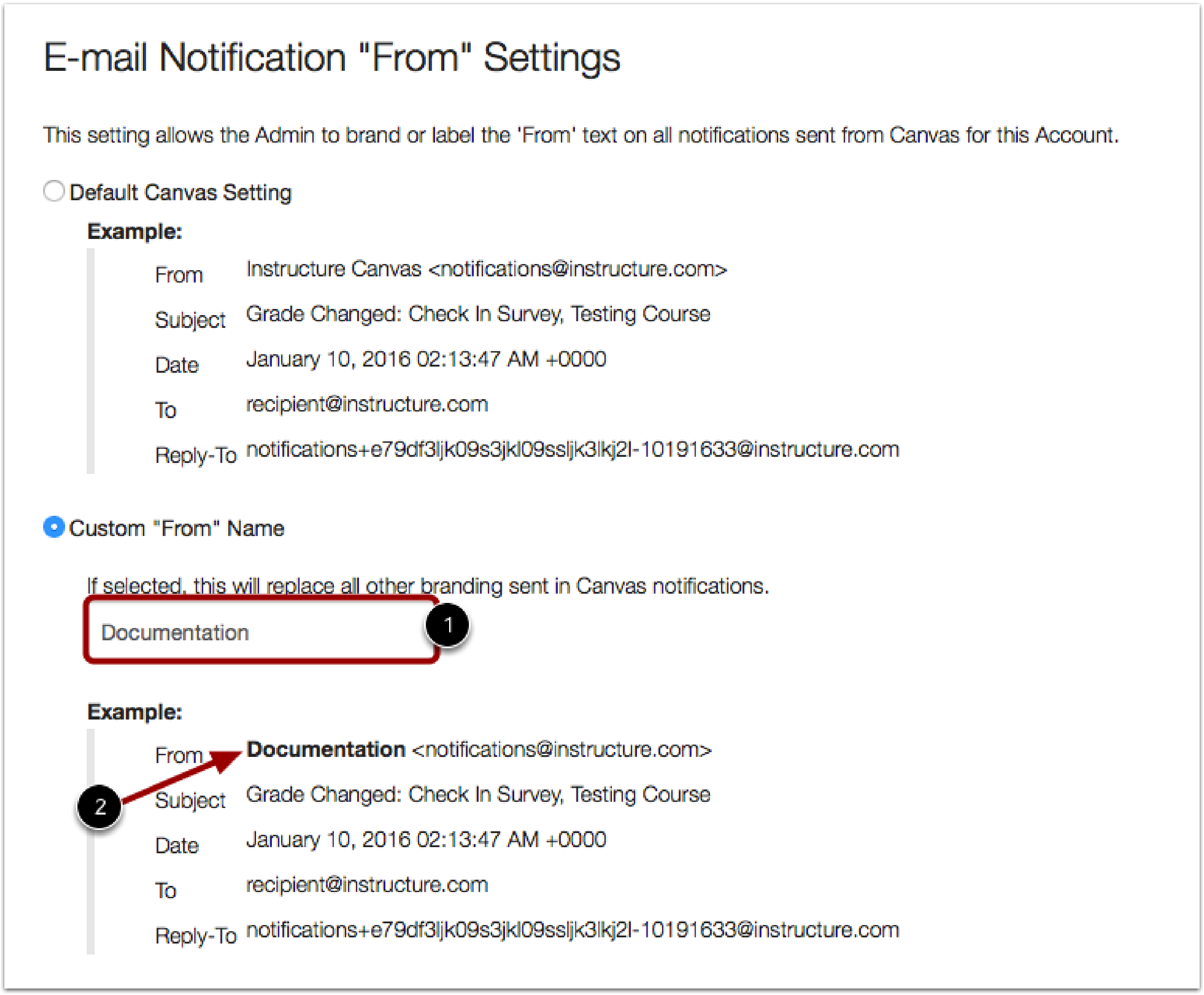
In Account Navigation, click the **Settings** link.

Open Notifications



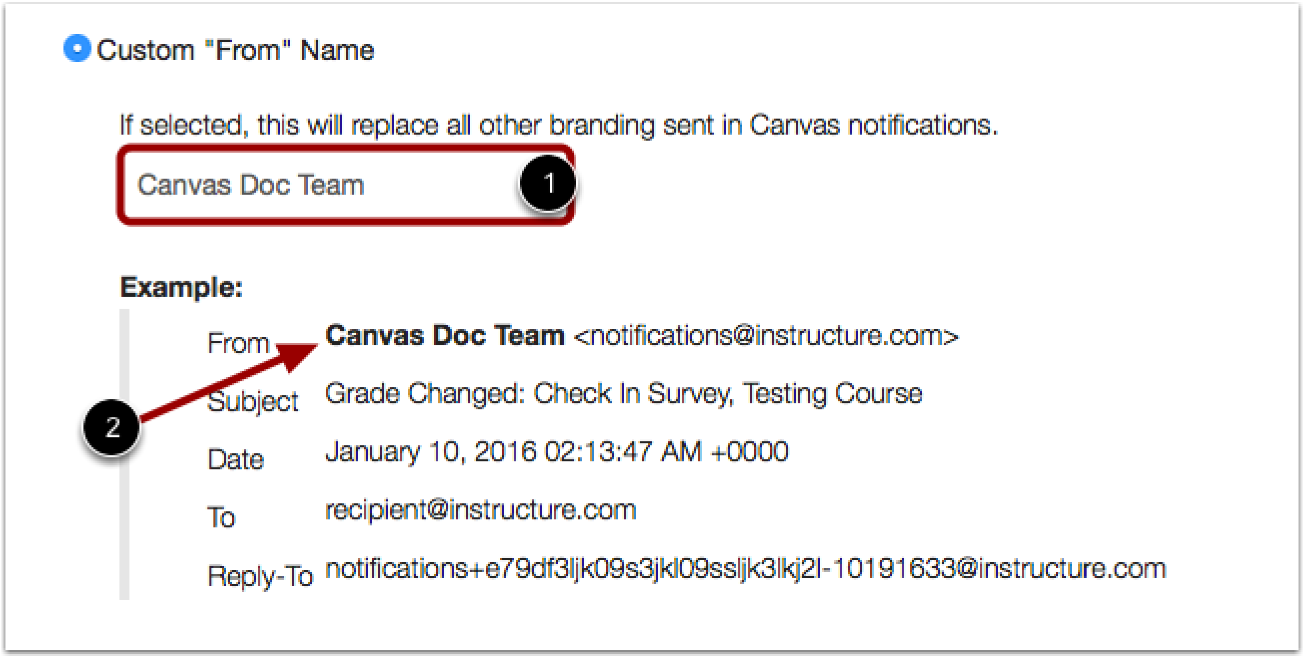
Click the **Notifications** tab.

Select Custom "From" Name



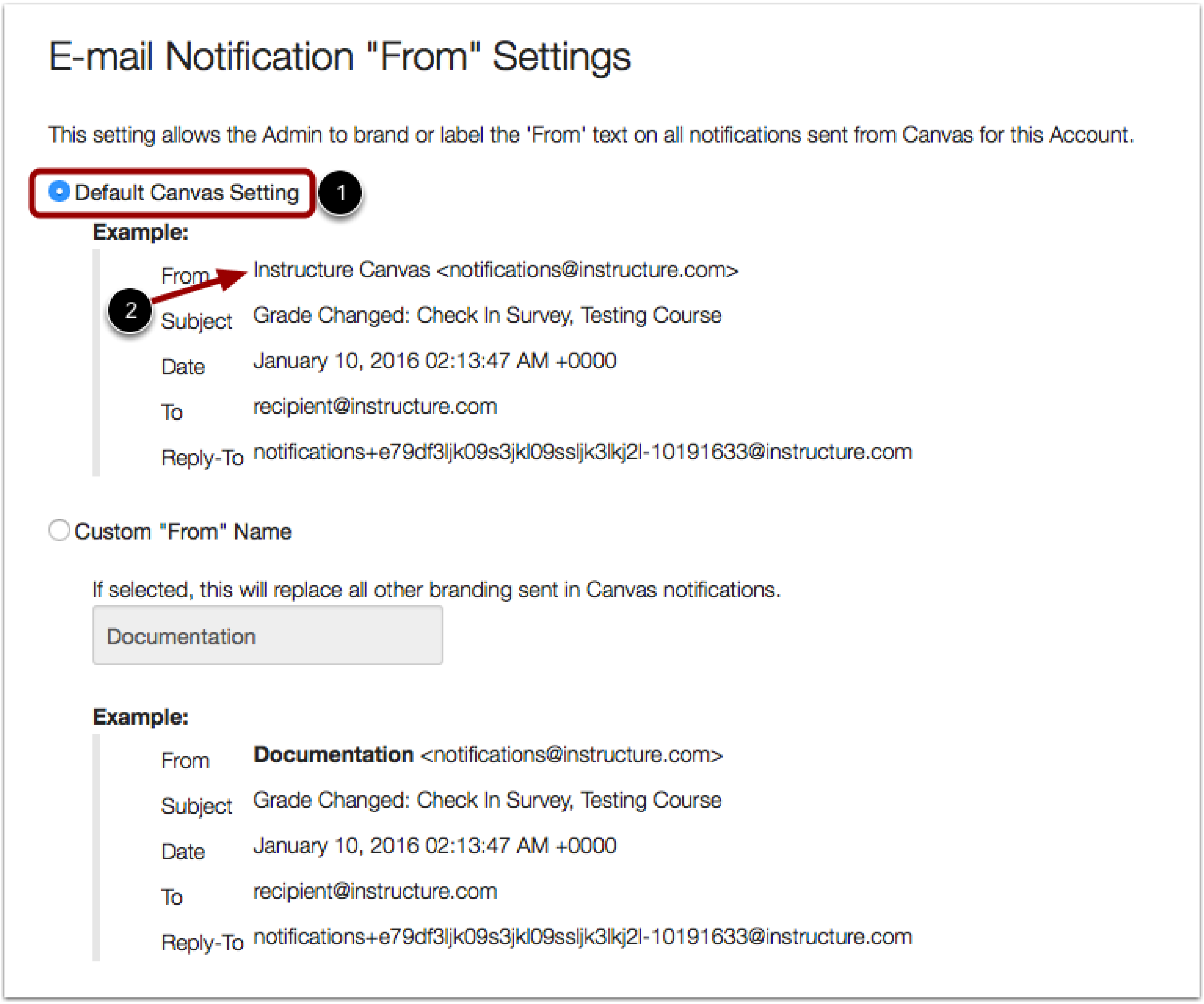
By default, Canvas will select the Custom "From" Name option and automatically populate it with the name of your account [1]. It will also show you an example of how the name will appear in the "from" field of the email notification [2].

Change Custom "From" Name



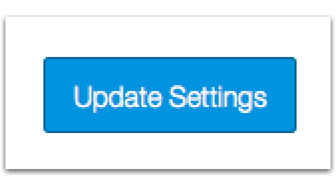
Type your preferred name into the **Custom "From" Name** field [1]. Verify the example of the name as it will appear in the "from" field of the email notification [2].

Select Default Canvas Setting



If you do not want to have a Custom "From" Name, select the Default Canvas Setting option [1]. The "From" name will be posted as Instructure Canvas [2].

Update Settings

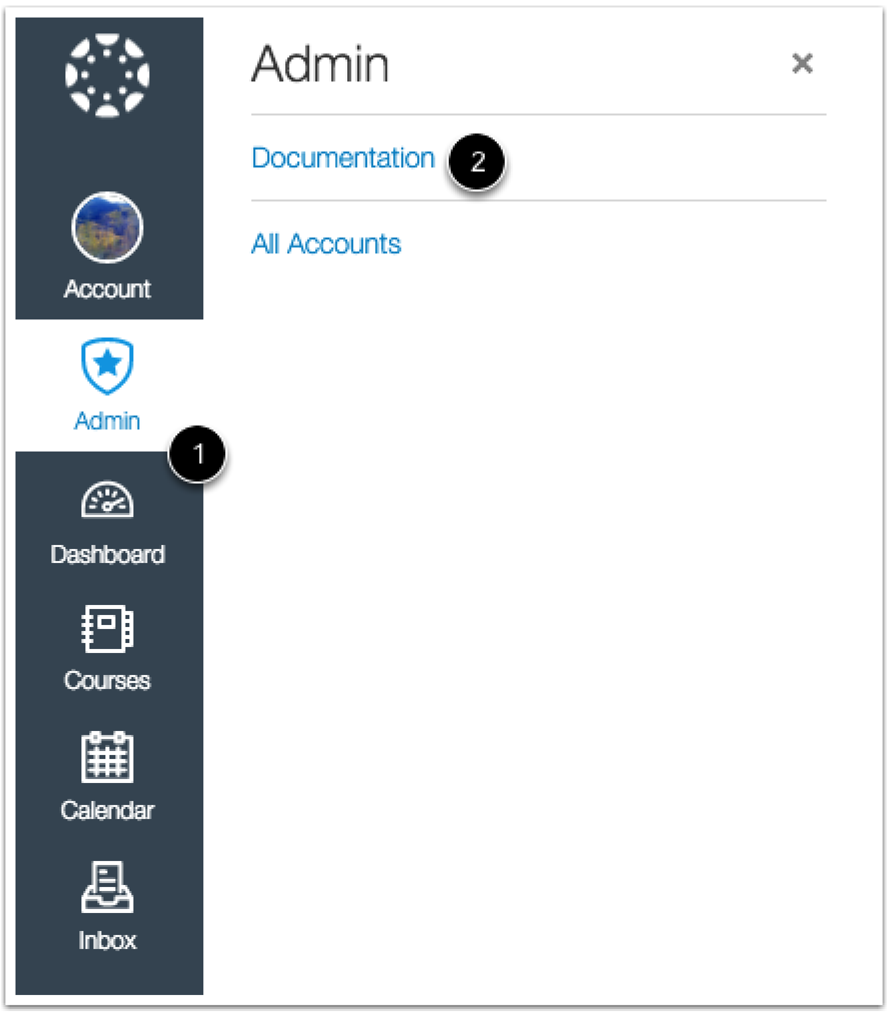


Click the **Update Settings** button.

How do I warn users in an account about using non-institutional email addresses for confidential information?

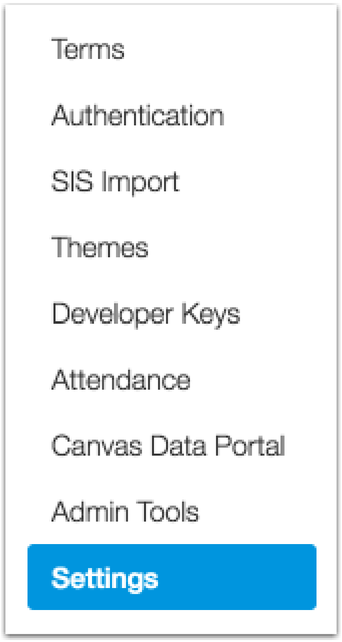
Administrators can enable a warning reminding all users about preferred email addresses for notifications. When enabled, the next time users at that institution visit the Notification Preferences page, they will see a popup alerting them that adding a non-institution based email address may result in the exposure of sensitive content. View how the notification warning appears to users.

Open Account



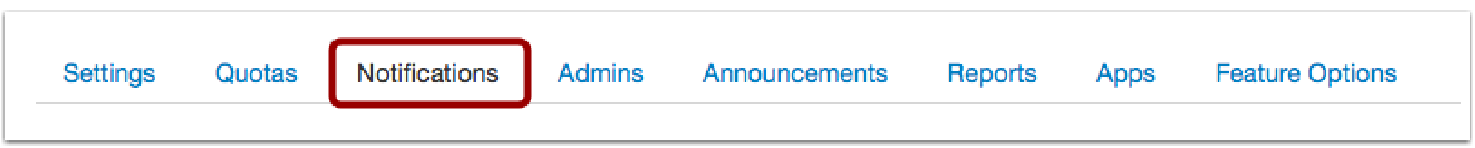
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Account Settings



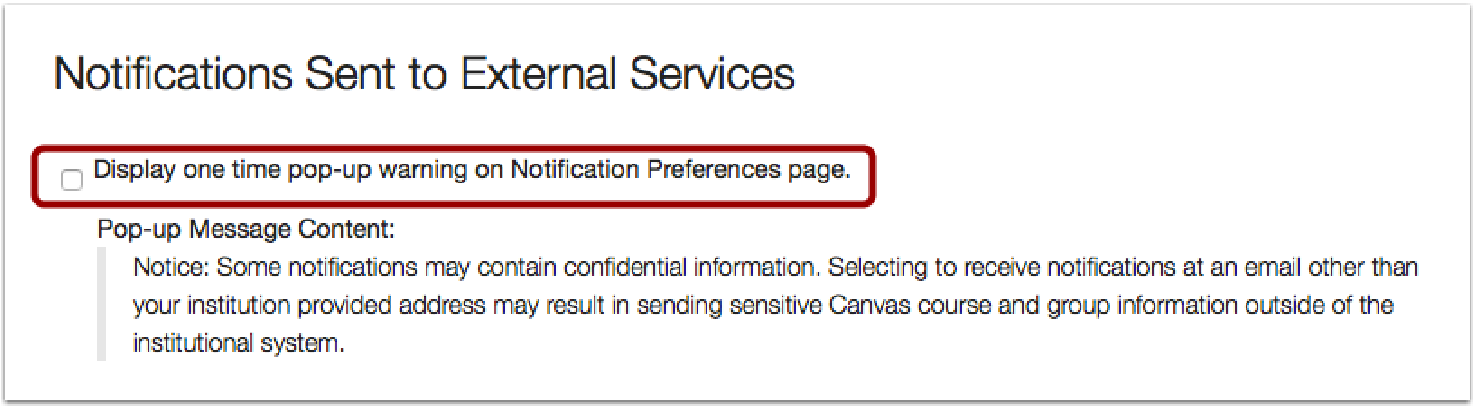
In Account Navigation, click the **Settings** link.

Open Notifications



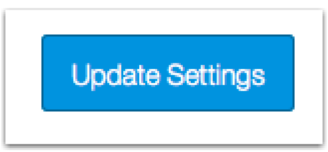
Click the **Notifications** tab.

Select Display Warning



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 for an account before or after the course date?

As an Admin, you can choose to set default restrictions for student access in your institution. These restrictions include student access to courses before the start date and/or after the end date.

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 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. See how restricting student access appears at the course level.

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.

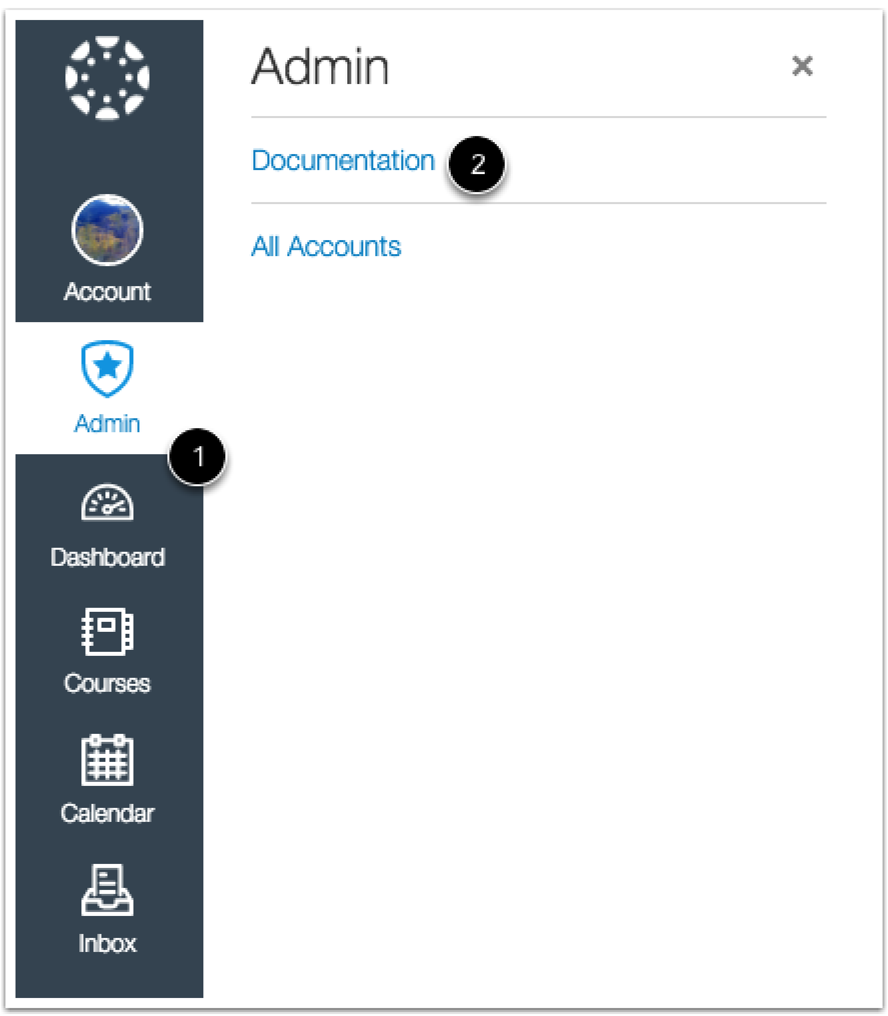
Restrict students from viewing future courses in enrollments list: When a student enrolls in a future course, the course displays in the Future Enrollments section in the student Courses list. However, when the *view courses before the start date* restriction is enabled, a second option is displayed 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.

Learn more about how students view their courses when these settings are applied.

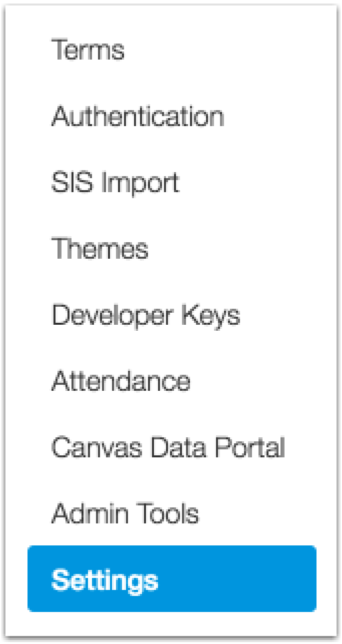
These restriction settings also apply to the override start and end dates for the course. If no override dates are specified, the start and end dates apply to the term dates. Learn more about term and course dates in Canvas.

Open Account



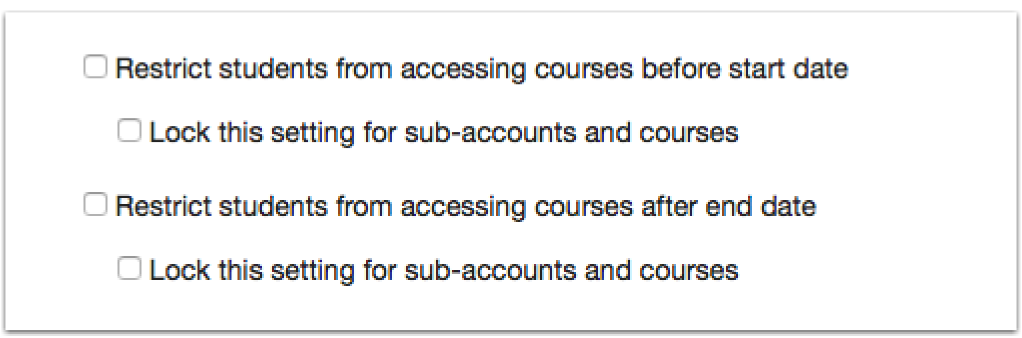
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Account Settings



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

View Restriction Options



In the Account Settings tab, locate the course restriction options.

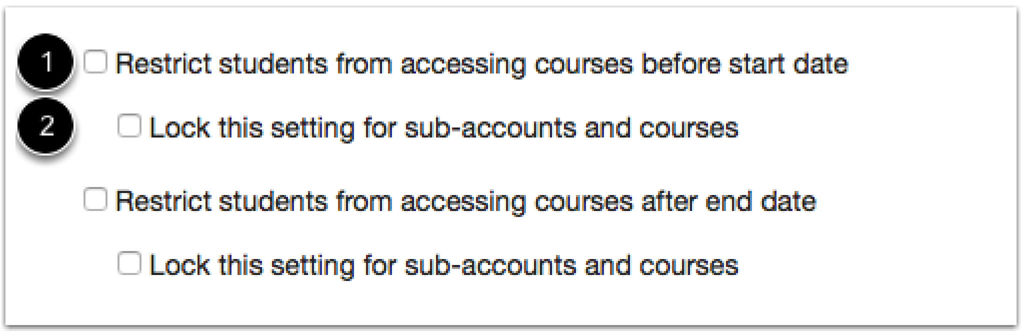
By default, student access checkboxes are not selected, meaning students can view a link to any enrolled future course (after they accept their course invitation) or a concluded course.

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.

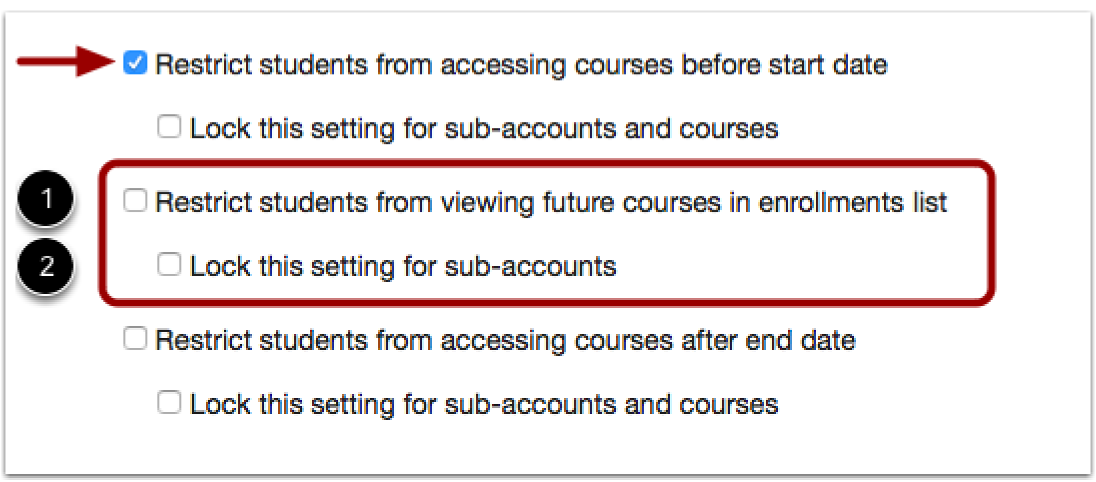
Restrict Students Before Start Date



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 viewing courses before start date** checkbox [1].

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].

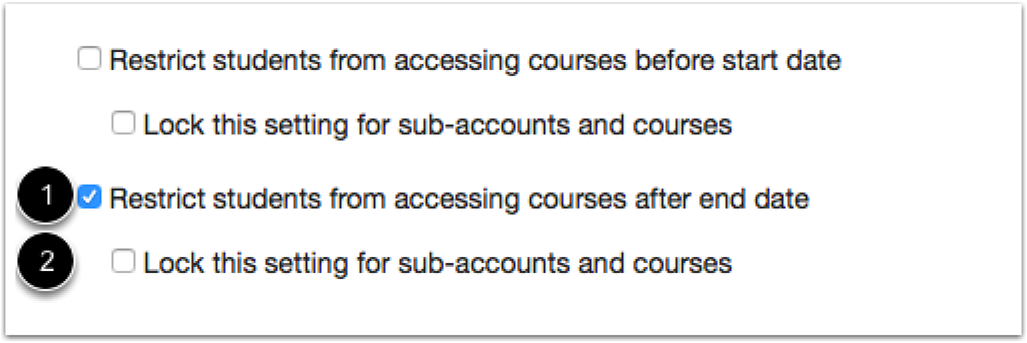
Restrict Course in Enrollments List



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].

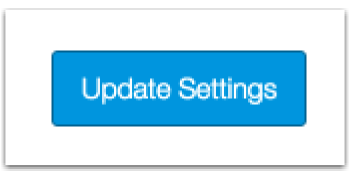
Restrict Students After End Date



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].

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 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.

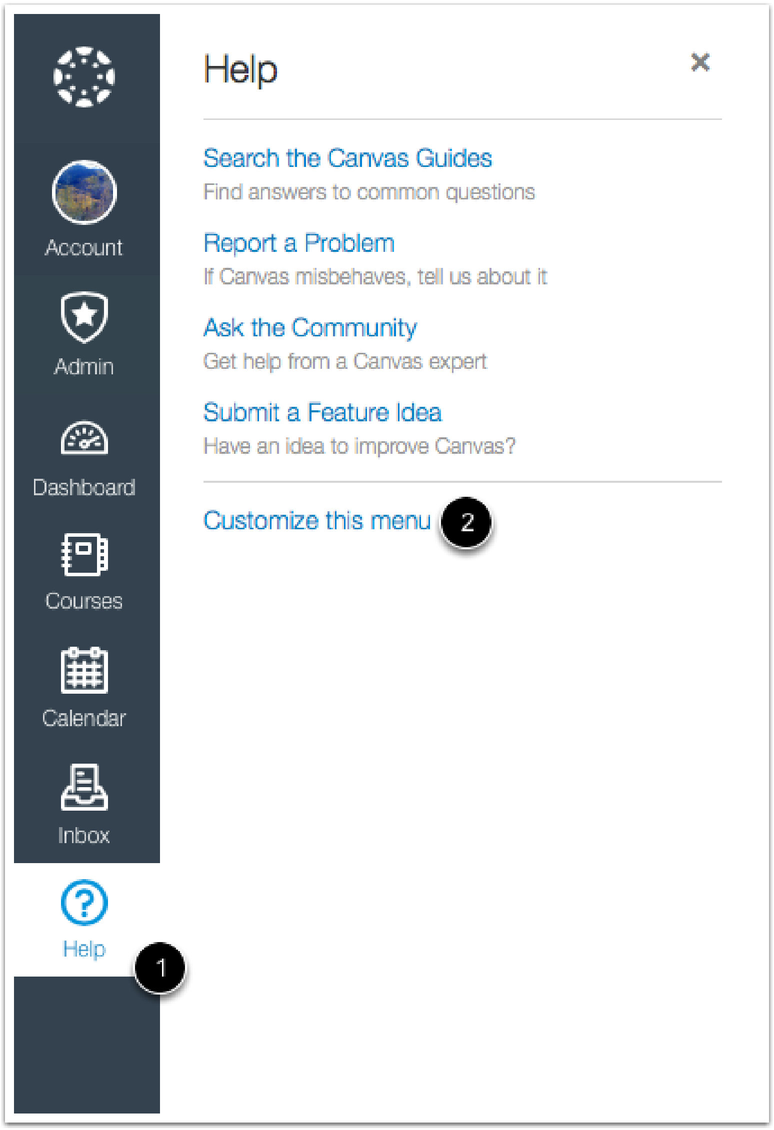
You can also change the Help icon and text that displays throughout Canvas.

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:

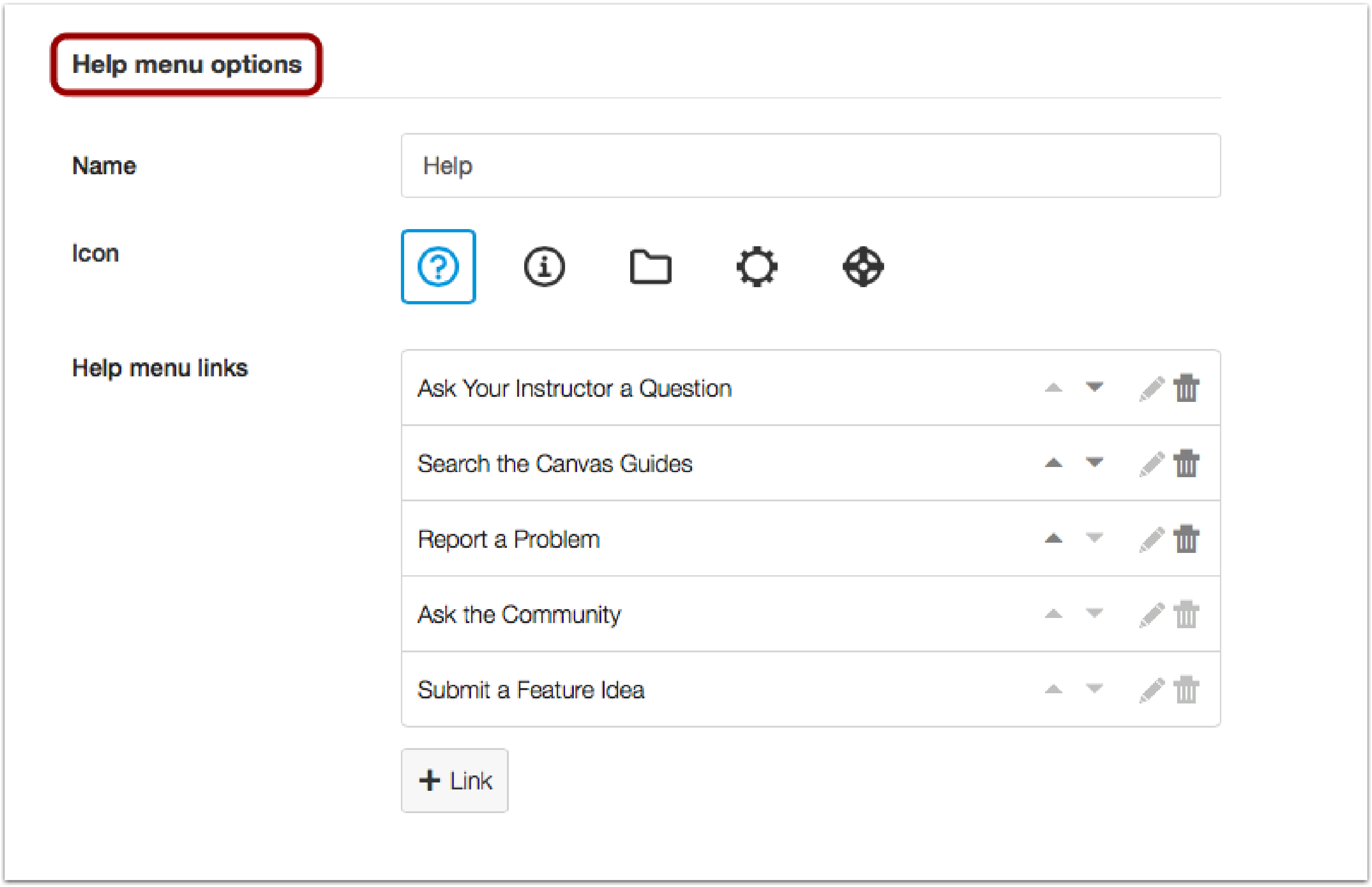
- Canvas Help Menu customizations are only available at the account level and apply to all subaccounts.
- Account-level features cannot be managed in Free-for-Teacher accounts.
- The Help menu links also display when a user accesses the Help link in the Login page.

Customize Help Menu



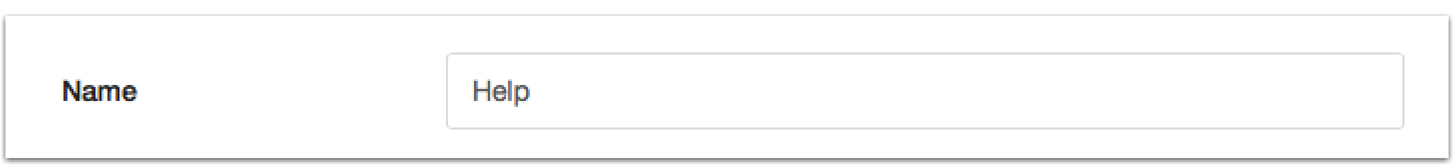
In Global Navigation, click the **Help Menu** link [1], then click the **Customize this menu** link [2].

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.

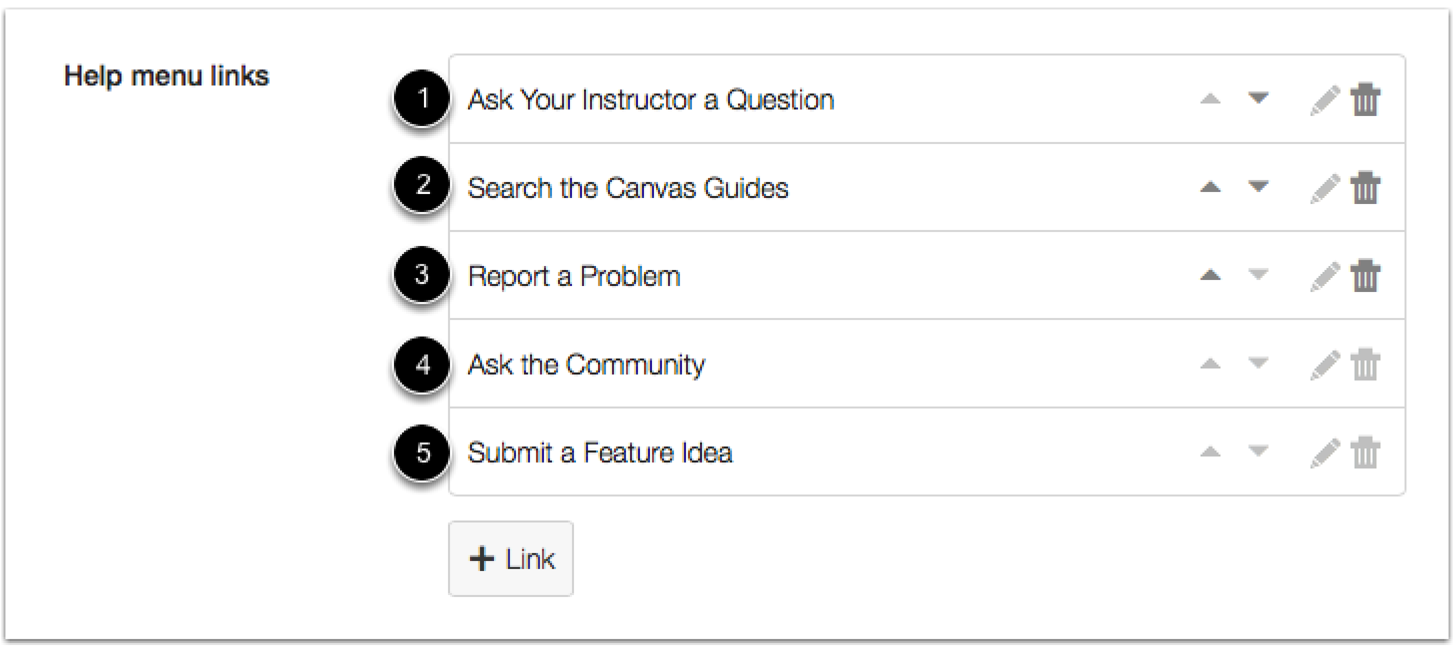
The name of the Help menu displays in the Global Navigation Menu, the footer of the login page, and the top menu bar in SpeedGrader. The name should be no more than 30 characters.

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.

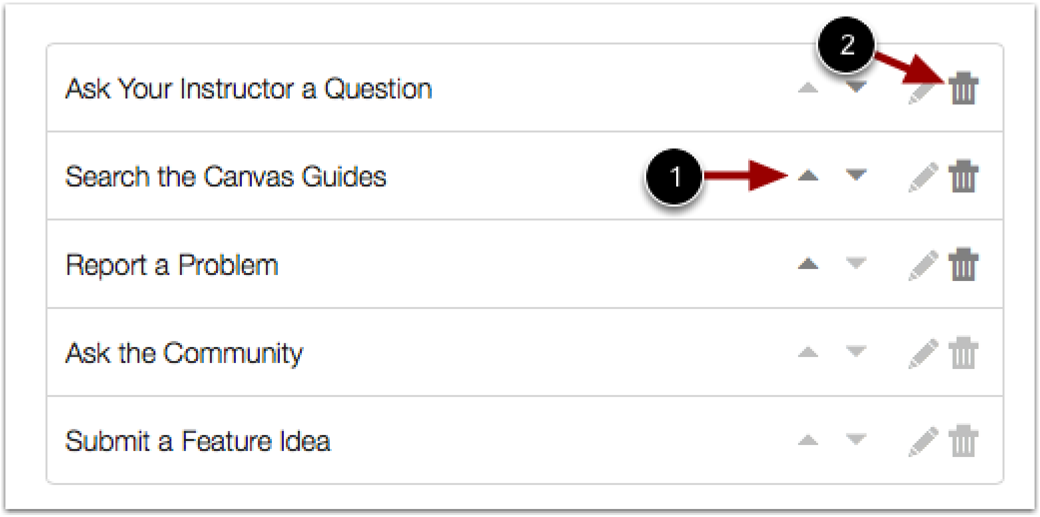
Customize Help Menu Links



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

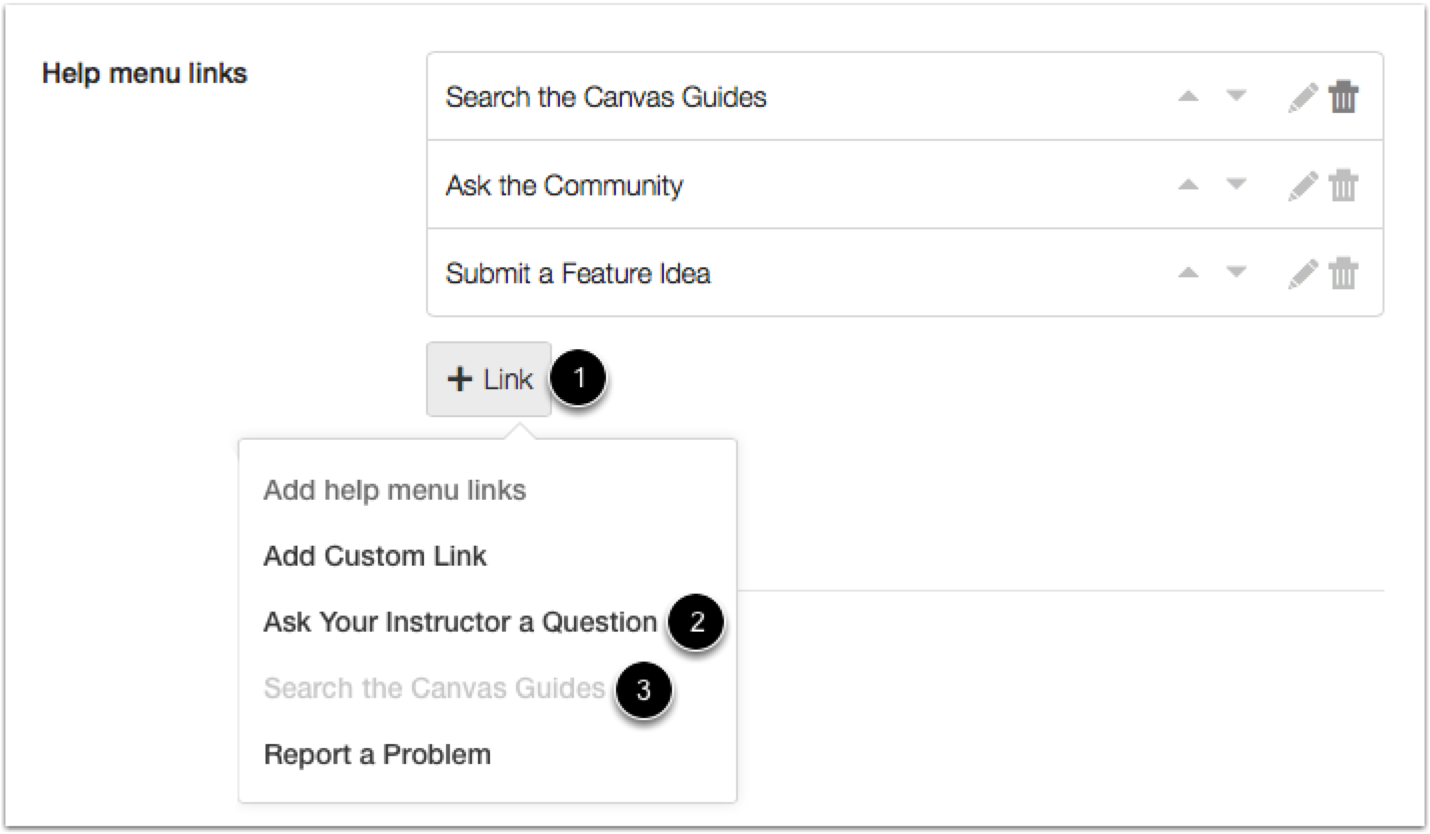


To move a default link up or down in the menu, click the up or down arrow [1]. To delete a default link, click the **Delete** icon [2]. Faded icons or links cannot be modified (e.g., default link names cannot be edited).

Notes:

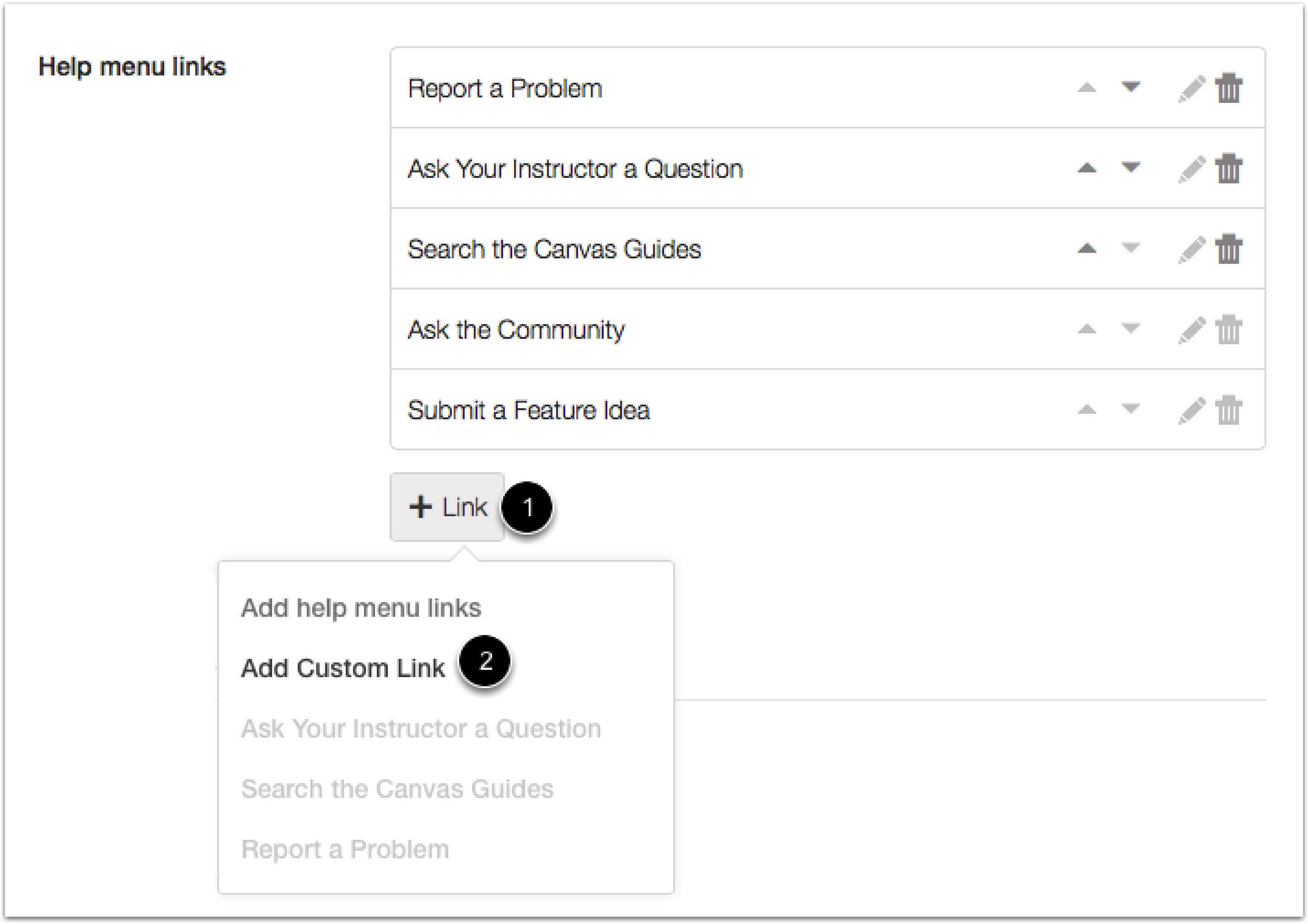
- Currently, Ask the Community (instructors and admins only) and Submit a Feature Idea links always appear at the end of the menu and cannot be deleted or moved.
- The Help menu links also display when a user accesses the Help menu from the Login page. However, even when enabled, Ask Your Instructor 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.

Restore Default Links



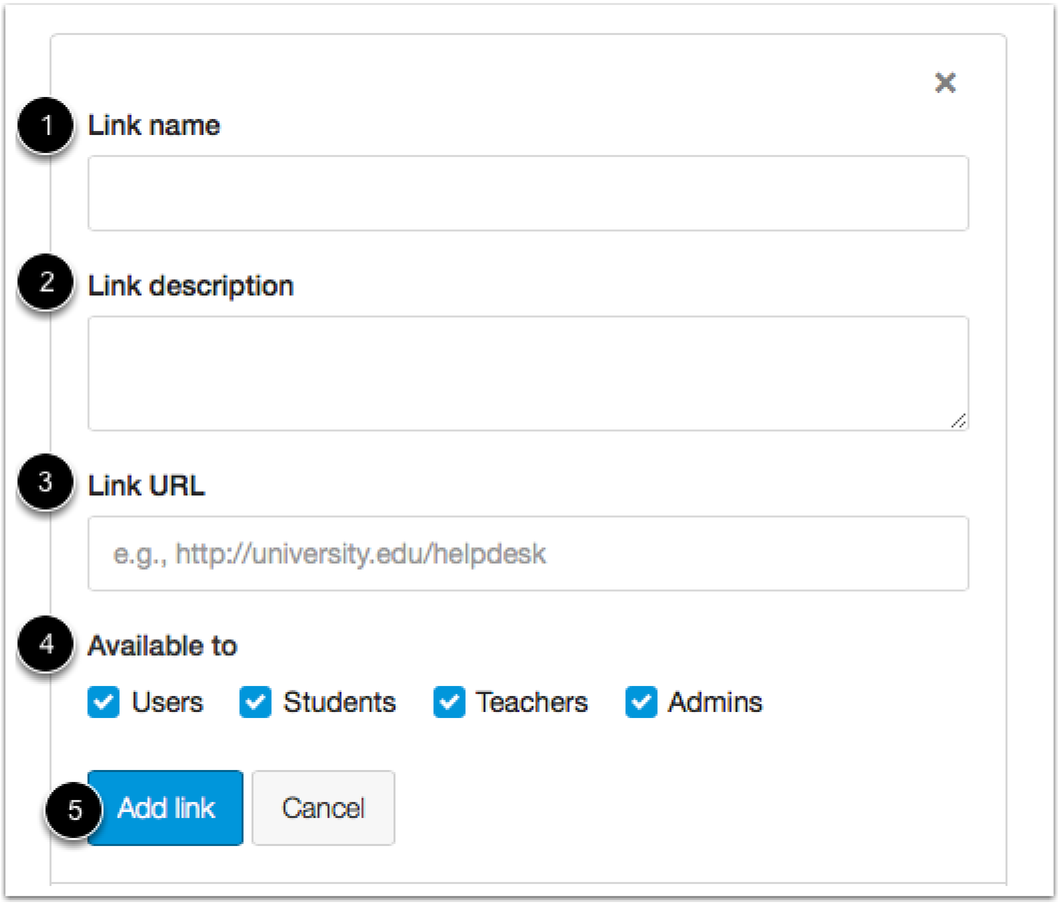
If you want to restore a default link in the Help menu, click the **Add Link** button [1] and select the name of the link [2]. Faded links cannot be added as they are already in the Help menu [3].

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].

Add Link



In the **link name** field [1], enter the link name.

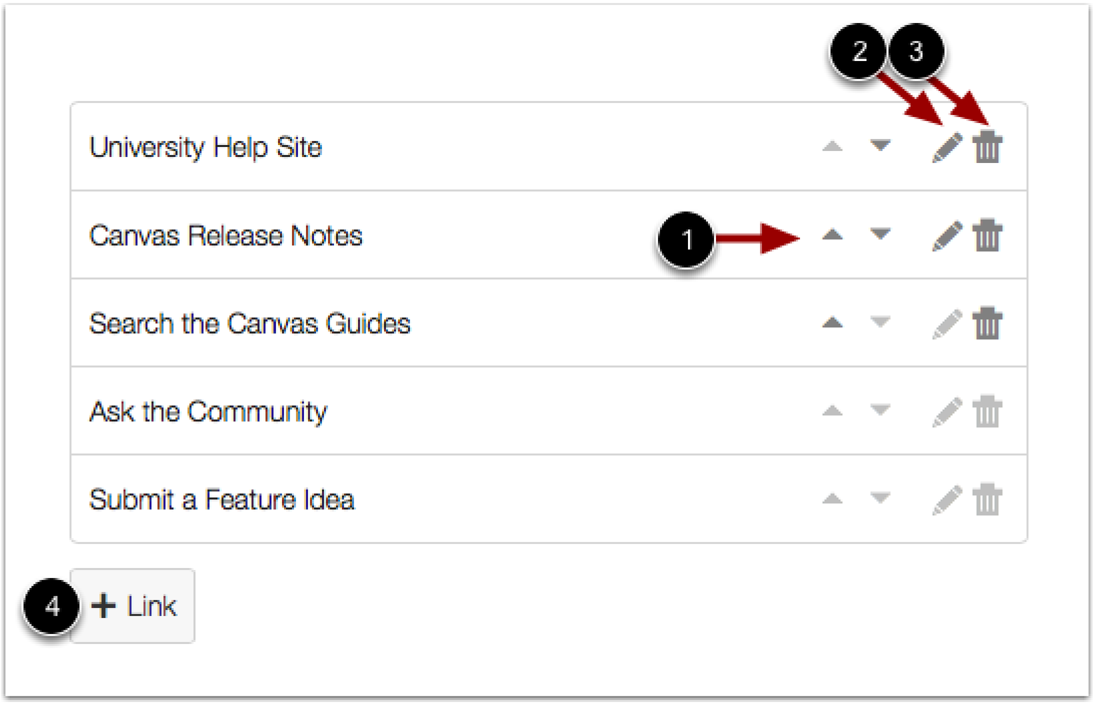
In the **link description** field [2], enter a description for the link.

In the **link URL** field [3], enter the URL for the link. *This field is required.*

For the **Available to** checkboxes [4], select the user(s) who can view the link. Options include all users, students, teachers/ instructors, and admins. Unless otherwise changed, custom links select checkboxes for all roles.

Click the **Add Link** button [5].

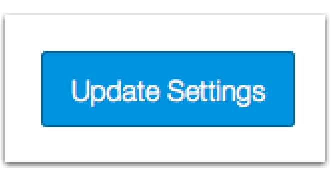
Manage Custom Links



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 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.

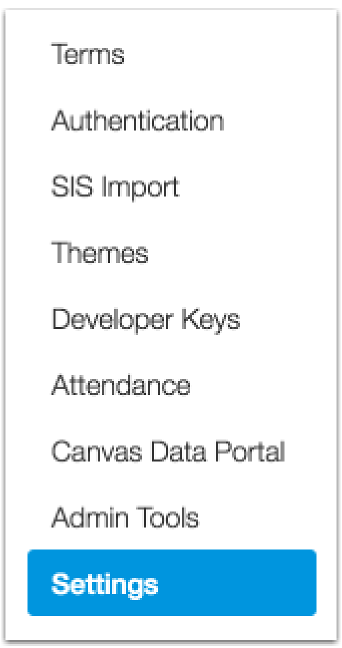
This lesson gives an overview of how to manage feature options for an entire account. Features can be activated on account, course, and user levels. On the course level, you can give instructors the option to implement features on a course-by-course basis. Admins and instructors have no control over 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.

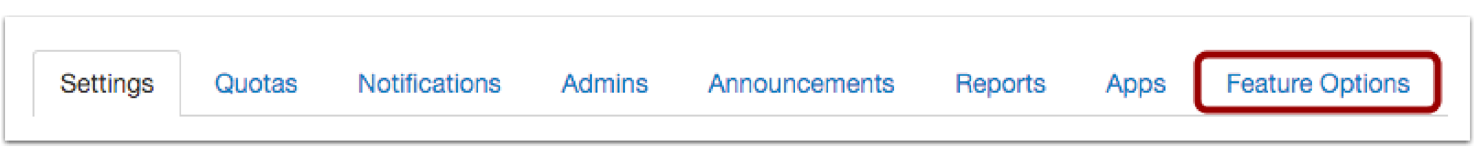
Note: Account-level features cannot be managed in Free-for-Teacher accounts.

Open Account Settings



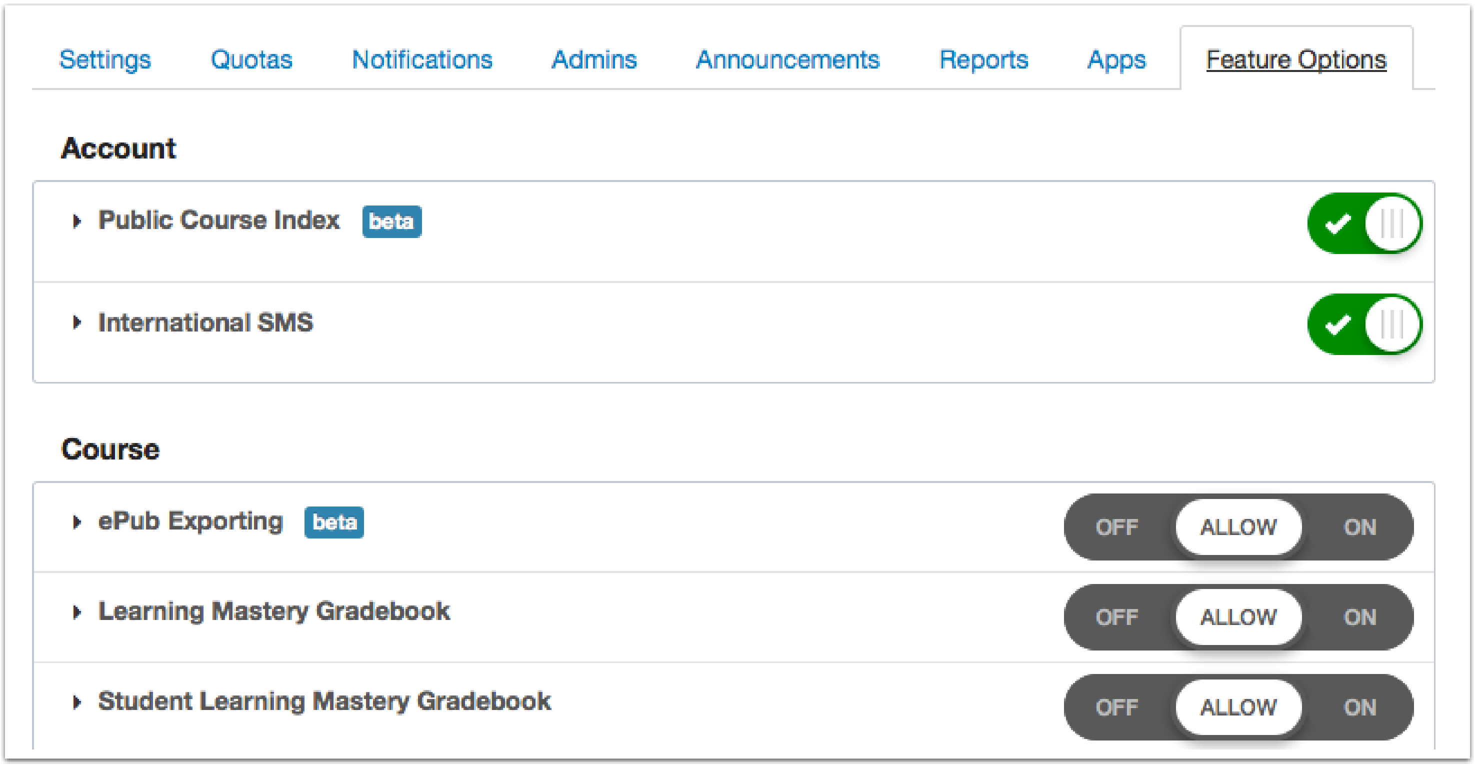
In Account Navigation, click the **Settings** link.

Open Feature Options Tab



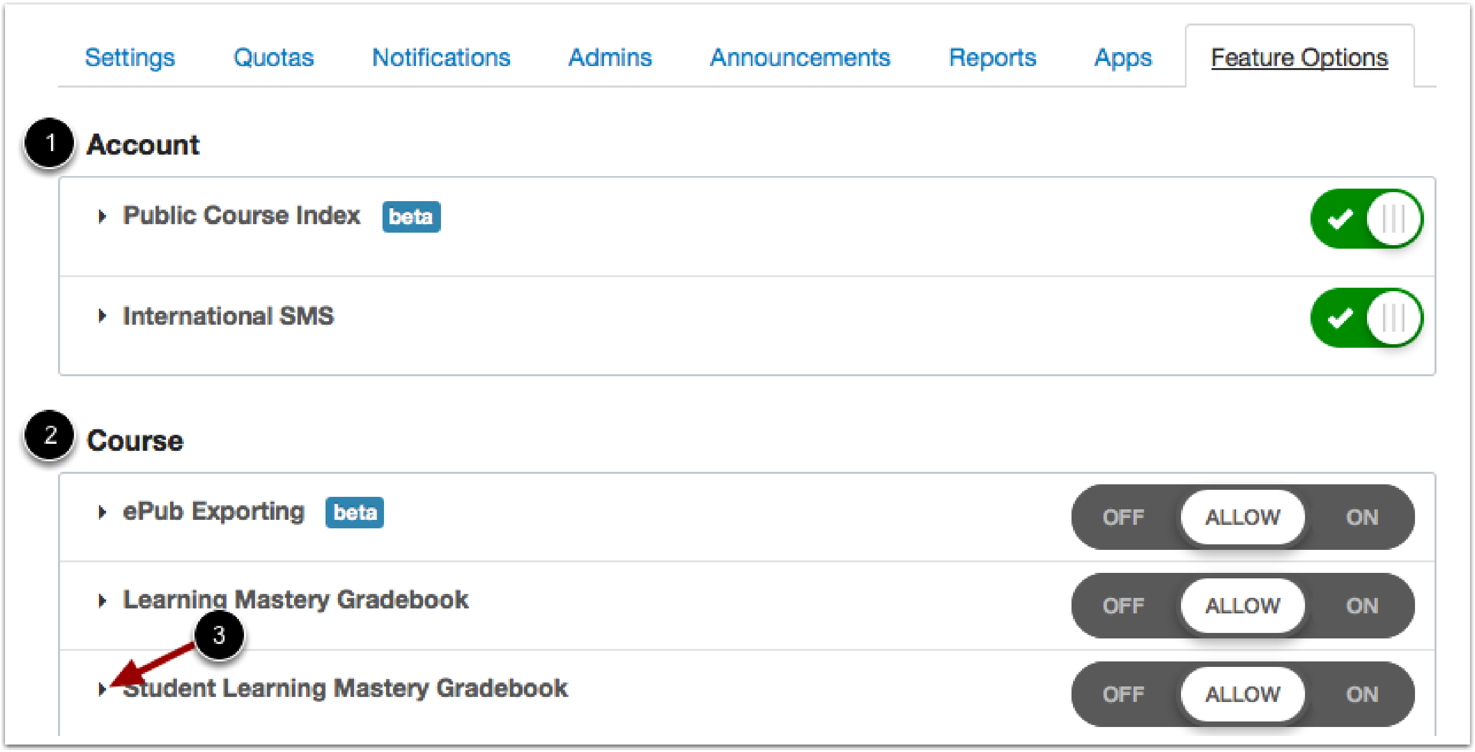
Click the **Feature Options** tab.

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.

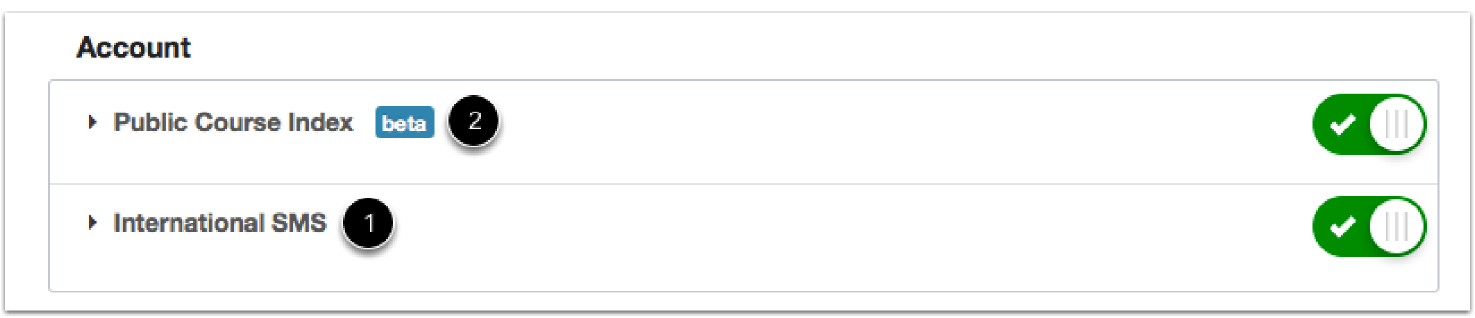
View Types of Features



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].

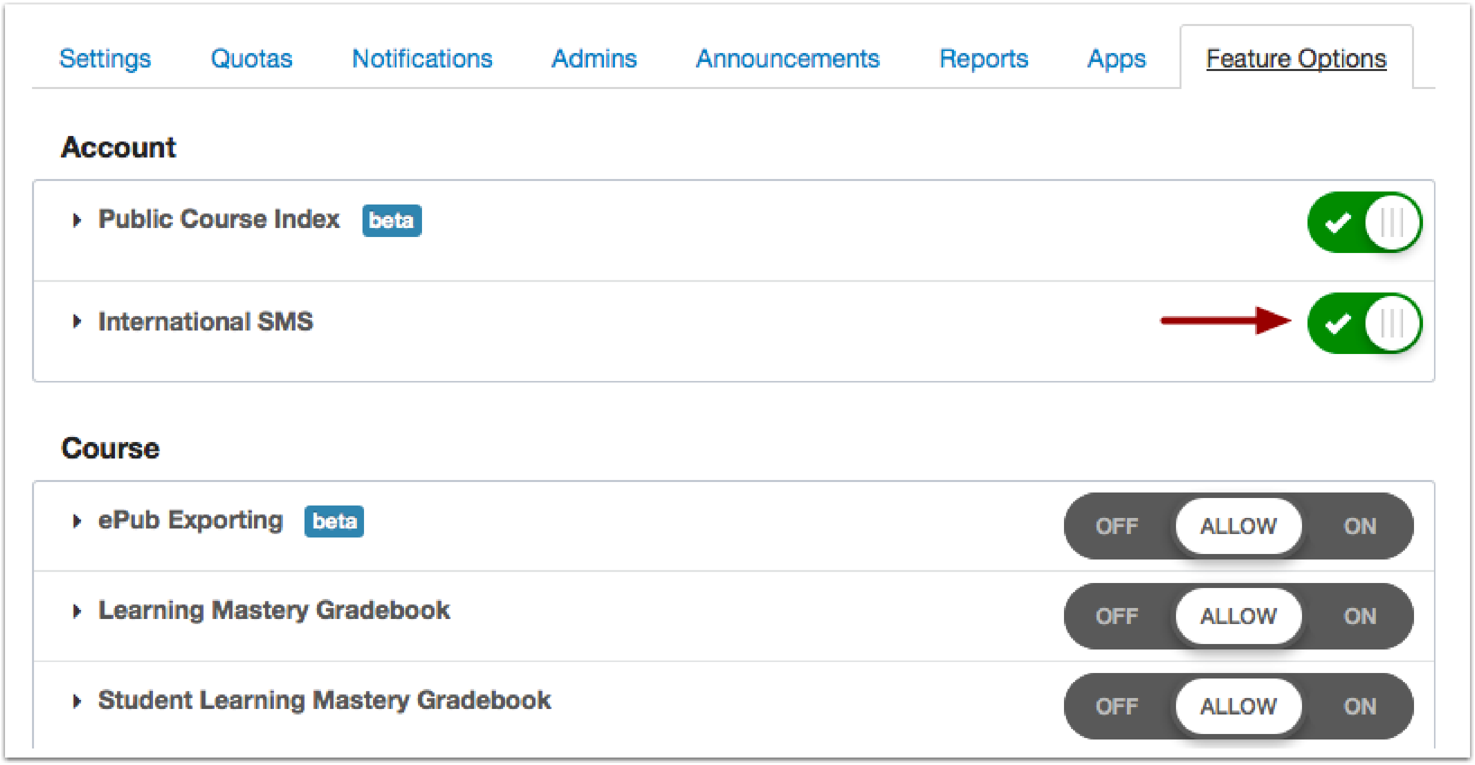
View Feature Tags



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



Each feature displays a feature access status that can be changed according to your preference.

View On Feature

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

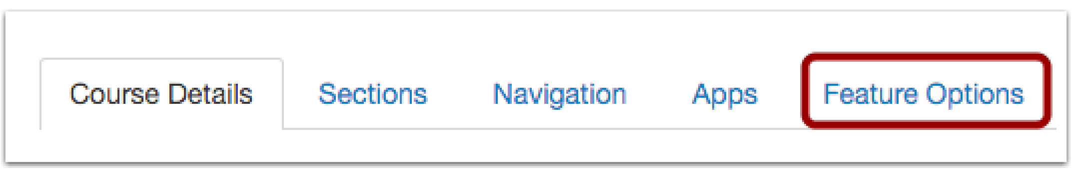
If a feature is made available in Canvas, you can choose how you want to manage the feature for your account. The feature will display three options:

1. **On:** Toggle this button to turn on this feature for accounts and 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 let instructors choose whether or not they want to use the feature in their courses. This option is good for features that have been requested by instructors or that may need to be phased into the account on a course-by-course basis.
3. **Off:** Toggle this button if you do not want to enable this feature for your accounts and subaccounts. 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.

The Allow option is only available for course-level features. 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.

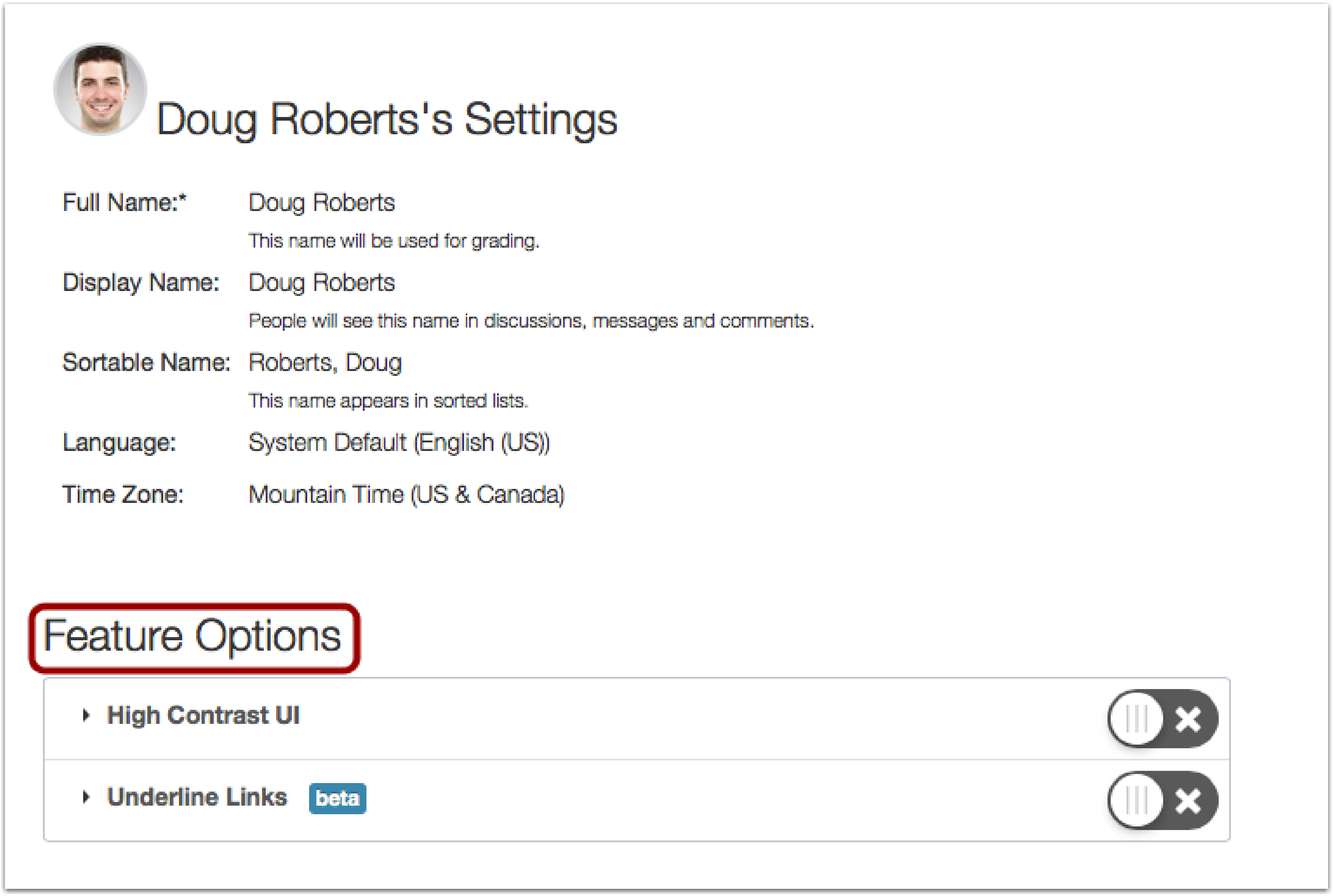
Note: *Depending on feature functionality*, when you enable a feature to Allow or On, Canvas *may* display a warning message asking to confirm your option, as some account features cannot be turned off once they are enabled.

View Course-Level Features



Instructors can view features you've enabled in the Courses Feature Options tab. This tab is located within 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 at the account level?

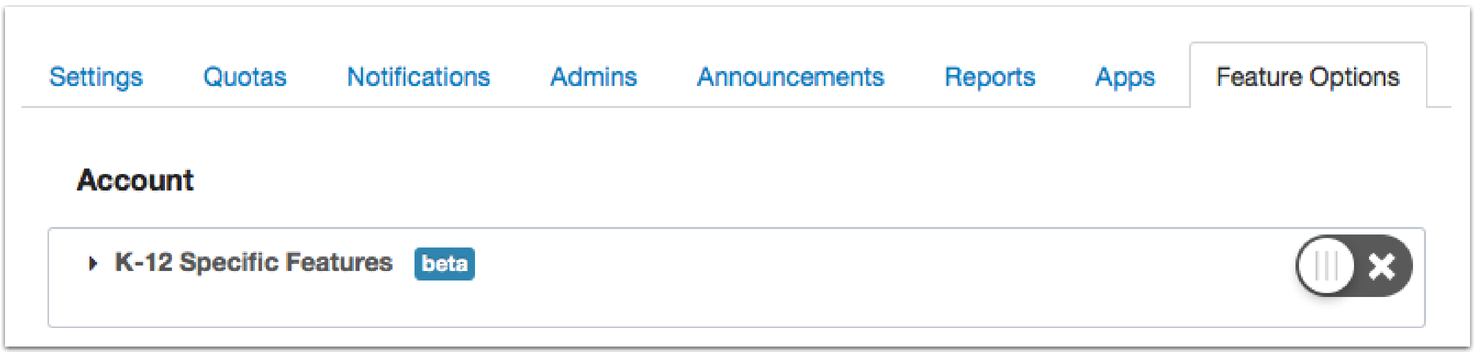
Canvas is continually creating new features to improve your experience. The majority of improvements will be made available as part of our regular release cycle. However, some features may change the workflow for common activities in Canvas during your current term and will be placed in your Account 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.

Note: Some feature options may not be available in Free-for-Teacher accounts. Please view the [Canvas Account Comparisons PDF](#).

K-12 Specific Features



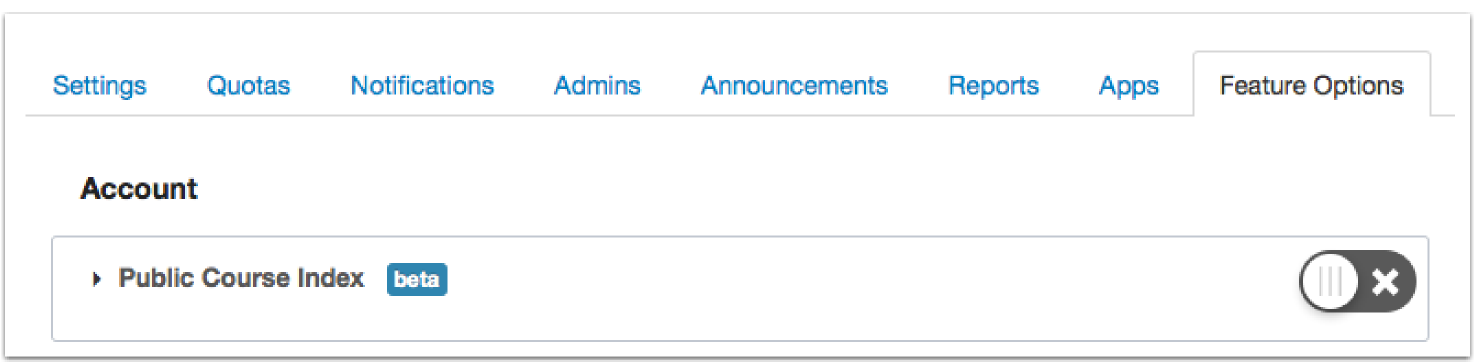
K-12 Specific Features must be configured with the support of your Canvas Customer Success Manager (CSM) before it can be enabled for your institution. Please contact your CSM for assistance.

K-12 Specific Features allows you to display the Global Navigation menu in K-12 specific branding. This feature can be used in conjunction with the New Canvas User Interface (UI) feature option 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 who want to display courses with public content. Courses can be added to the public course index on the course settings page.

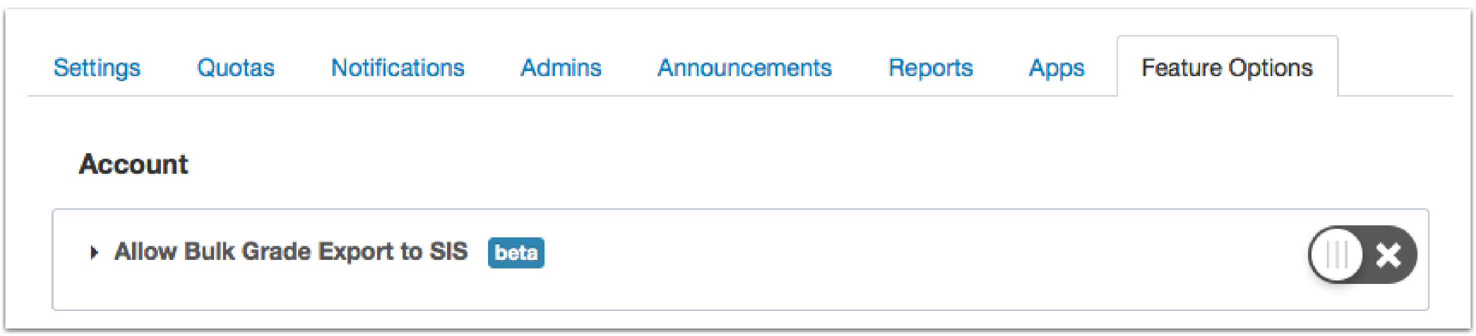
When enabled, users can open the My Courses page and view a link to the Public Course Index. Users can view all courses that have been listed in the public course index in an easy-to-view catalog format and locate a course by name, or they can sort courses by status: public or open enrollment.

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
- View the Public Course Index lesson in the Canvas Instructor Guide

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.

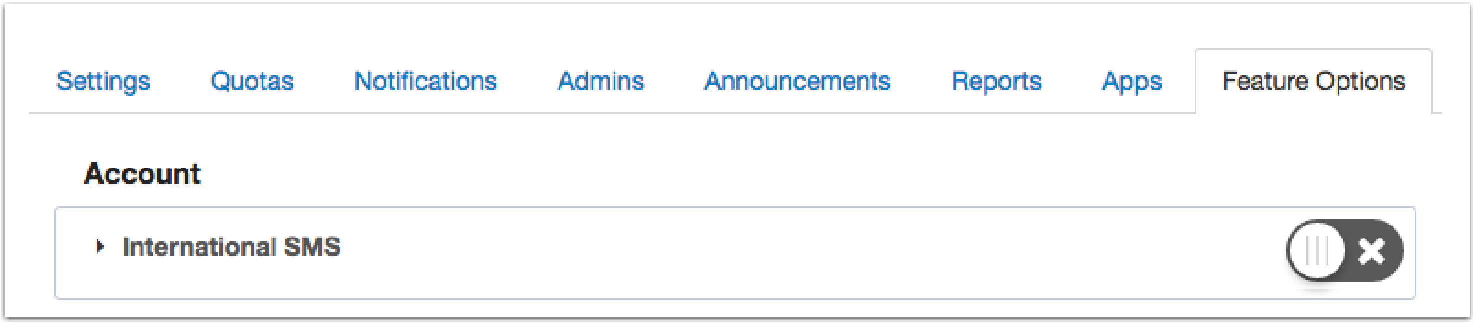
Allow Bulk Grade Export to SIS allows the Canvas Gradebook to share grade information with your institution's external Student Information System (SIS). This feature can be enabled on both account and subaccount levels. Only assignments that are individually selected by the instructor will be sent back 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).

Details

- Released in beta January 9, 2016
- Released in production February 20, 2016
- View the SIS Configuration lesson

International SMS



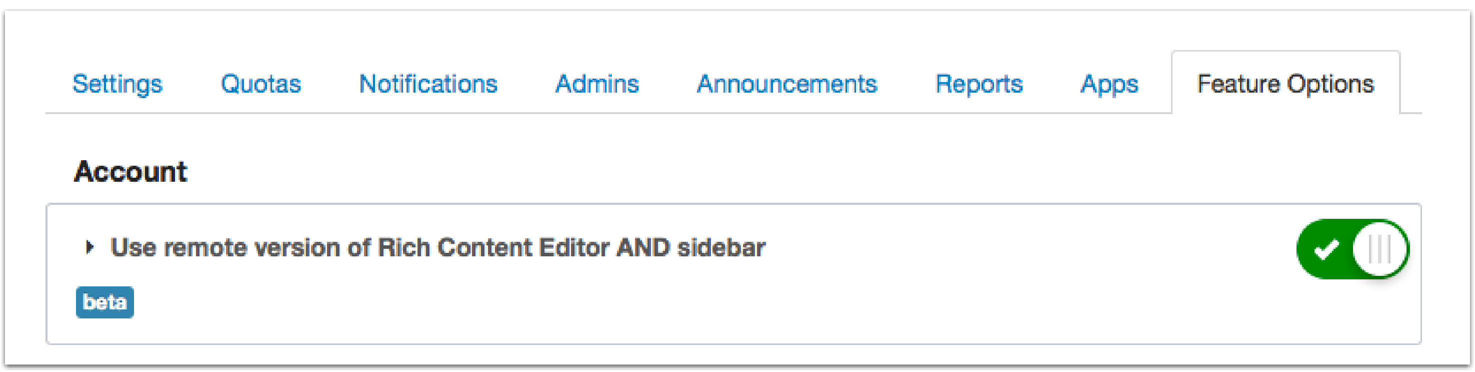
International SMS must be configured with the support of your Canvas Customer Success Manager (CSM) and an Implementation Consultant before it can be enabled for your institution. Please contact your CSM for assistance.

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
- View the Text Message (SMS) lesson in the Canvas Instructor Guide

Use Remote Version of Rich Content Editor and Sidebar



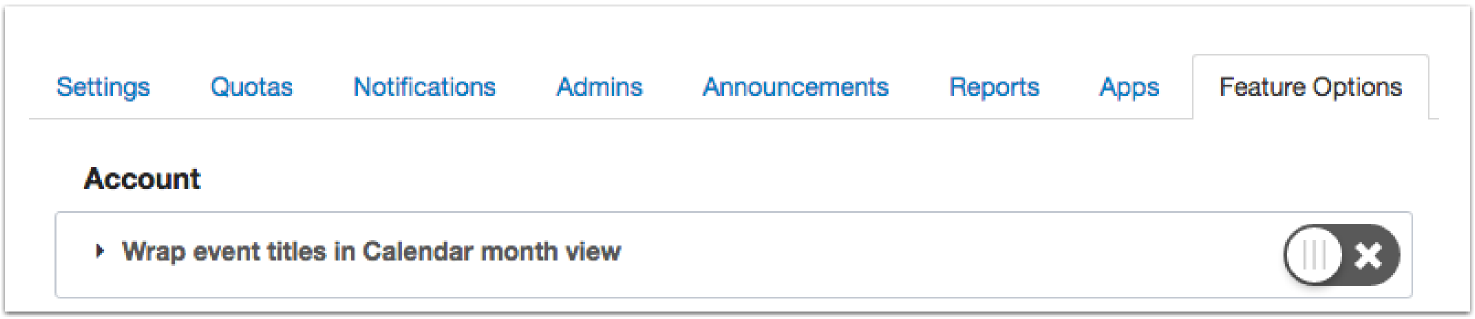
Use remote version of Rich Content Editor and Sidebar may already be enabled for your institution. If this feature option is not visible in your account, no action is required, as the feature is being managed by Canvas engineers. If you have questions about this feature, please contact your Customer Success Manager.

Use remote version of Rich Content Editor and sidebar allows an institution to load the Rich Content Editor and Content Selector using a backend service, which results in small interface changes. The sidebar includes a visual style update, and each content section supports pagination. Currently this feature only affects the Rich Content Editor in Pages and the Syllabus.

Details

- Released in beta July 5, 2016
- Released in production July 16, 2016
- View the Rich Content Editor Content Selector lesson in the Canvas Instructor Guide

Wrap Event Titles in Calendar Month View



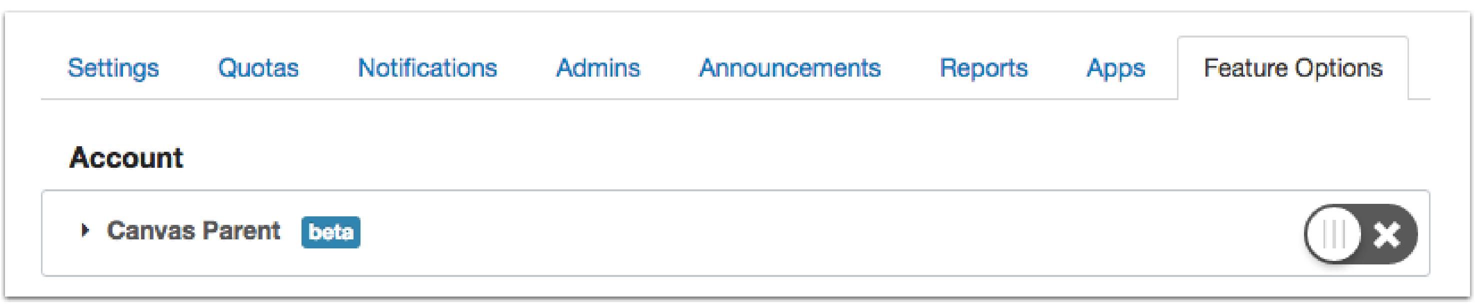
Wrap Event Titles in Calendar Month View allows the Calendar to support text wrapping for events and assignment titles with long names. When this feature is enabled, a calendar item name longer than the width of the date wraps the content to the next line. Some events may create additional white space 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
- View the Calendar lesson in the Canvas Instructor Guide

Canvas Parent



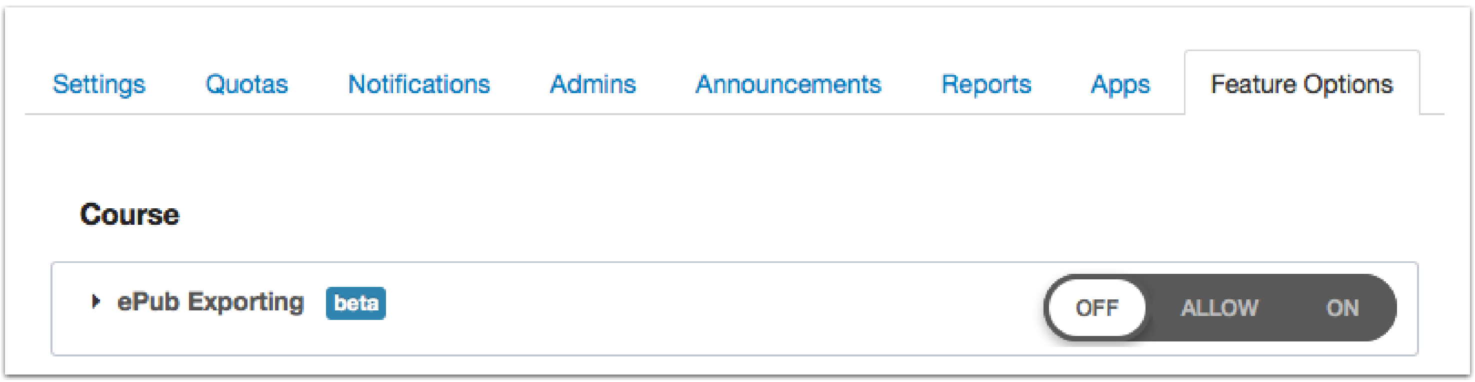
Canvas Parent allows parents to engage in their child's education using the Canvas Parent app. In the Parent App, any user can create an account, add a student using the student's name and password, and view the students' coursework, set upcoming alerts for assignment deadlines, view course events, and view grades.

Accounts created in Canvas Parent are separate from user accounts created in Canvas with Observer roles. This feature option allows Canvas Parent users to access student information from your institution. If this feature option is *not* enabled, users can create accounts but they will not be allowed to add a student and access student data.

Details

- Released in production August 10, 2016
- View the Observer role lesson in the Canvas Observer Guide

ePub Exporting



By default this feature is set to Off.

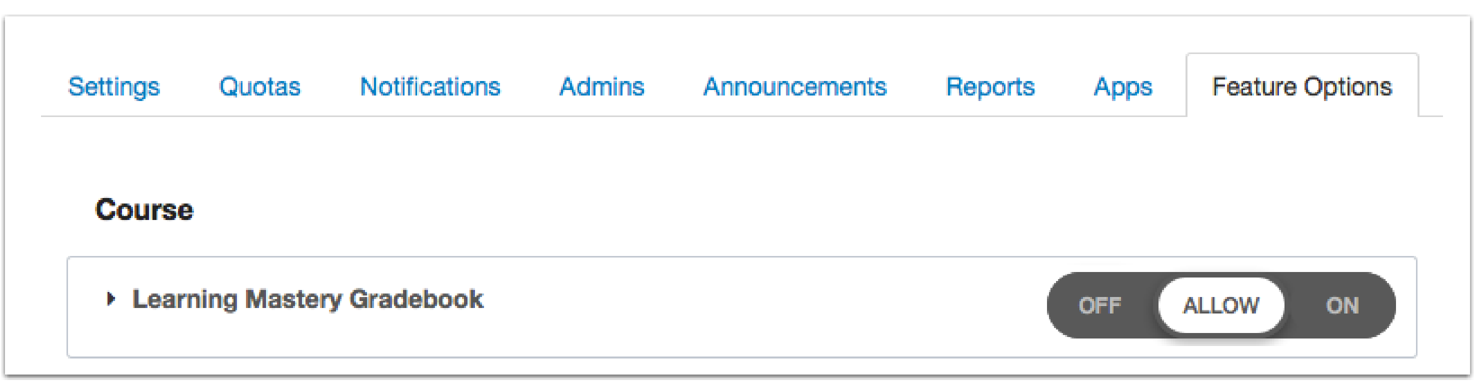
ePub Exporting allows all users to download a course as an ePub file. This feature allows users to view course content offline, such as files and pages. However, users cannot interact with the course in ePub material; course materials are displayed in a read-only state and any tasks such as submitting 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.

Details

- Released in beta November 30, 2015
- Released in production December 19, 2015
- View the ePub Exporting lesson in the Canvas Instructor Guide

Learning Mastery Gradebook



This feature will always be a feature option in Canvas. By default this feature is set to Allow.

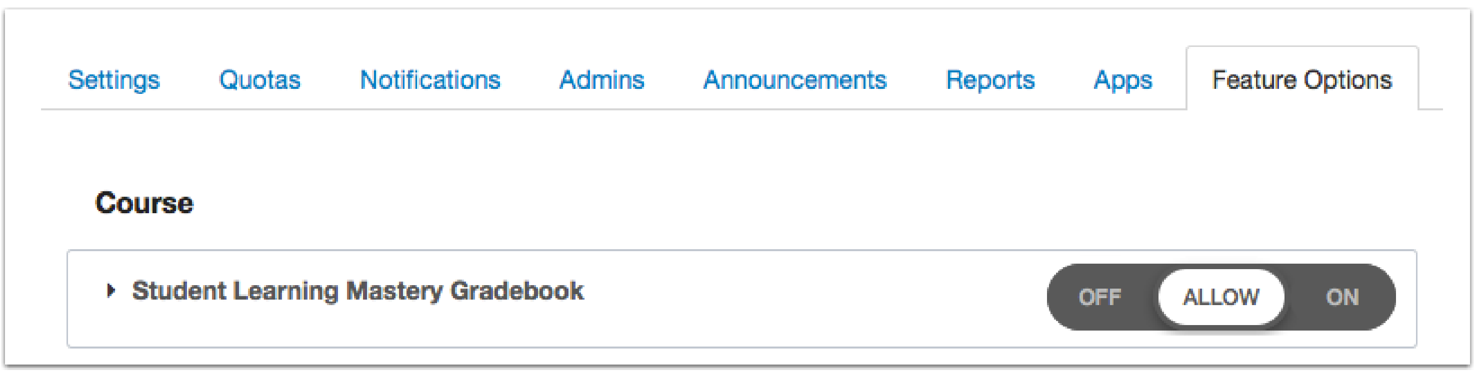
The Learning Mastery (Outcome) Gradebook helps you and your instructors assess the outcomes that are being used in Canvas courses. Located as part of the regular Gradebook, the Learning Mastery Gradebook provides an overview of student learning based on standards rather than grades. Instructors can also 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
- View the Learning Mastery Gradebook lesson in the Canvas Instructor Guide

Student Learning Mastery Gradebook



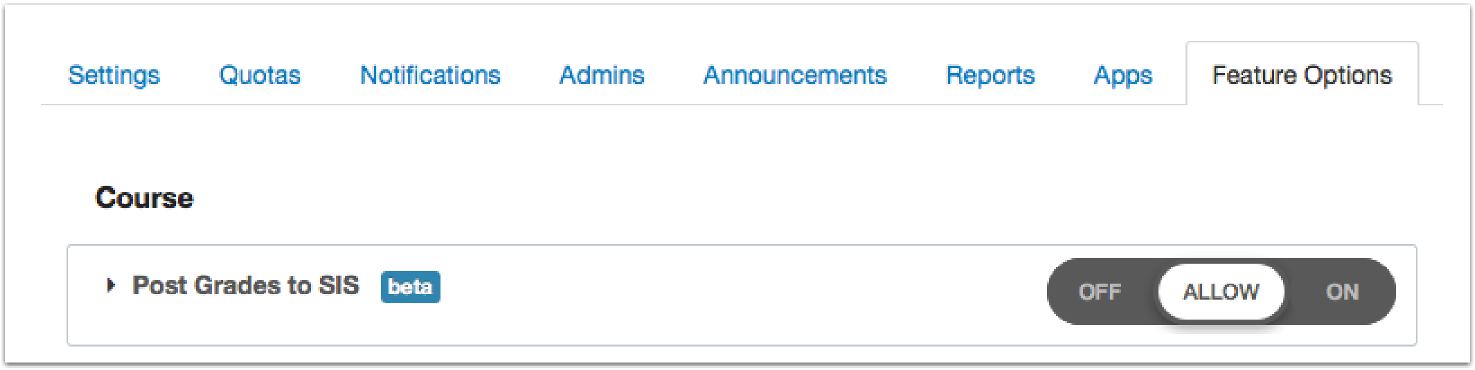
This feature will always be a feature option in Canvas. By default this feature is set to Allow. This feature can only be used in conjunction with the Learning Mastery Gradebook feature option.

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
- View the Student Learning Mastery Gradebook lesson in the Canvas Instructor Guide

Post Grades to SIS



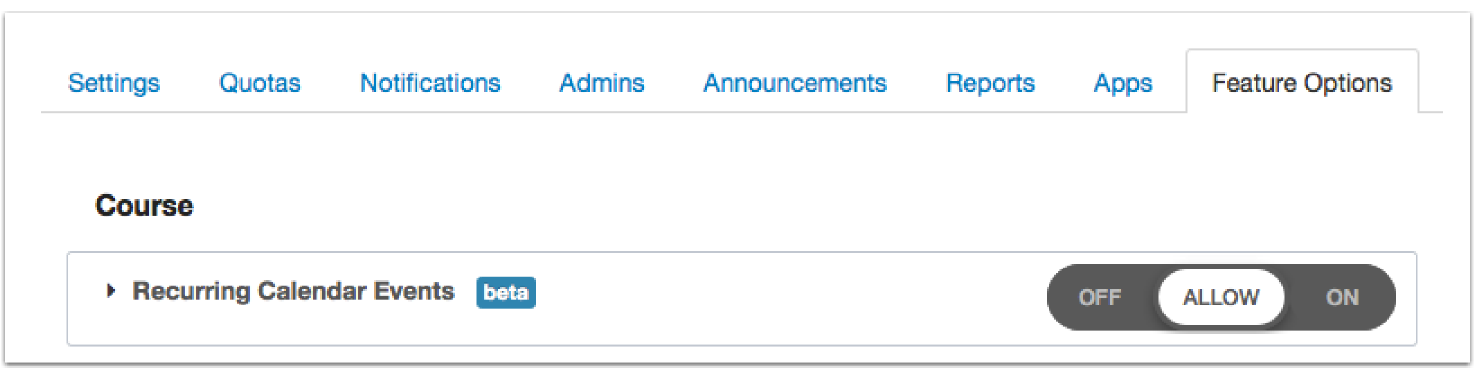
Post Grades to SIS must be configured with the support of your Canvas Customer Success Manager (CSM) and an Implementation Consultant before it can be enabled for your institution. Please contact your CSM for assistance.

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.

Details

- Released in beta December 29, 2014
- Released in production January 10, 2015
- View the Publish Grades to PowerSchool lesson in the Canvas Instructor Guide

Recurring Calendar Events



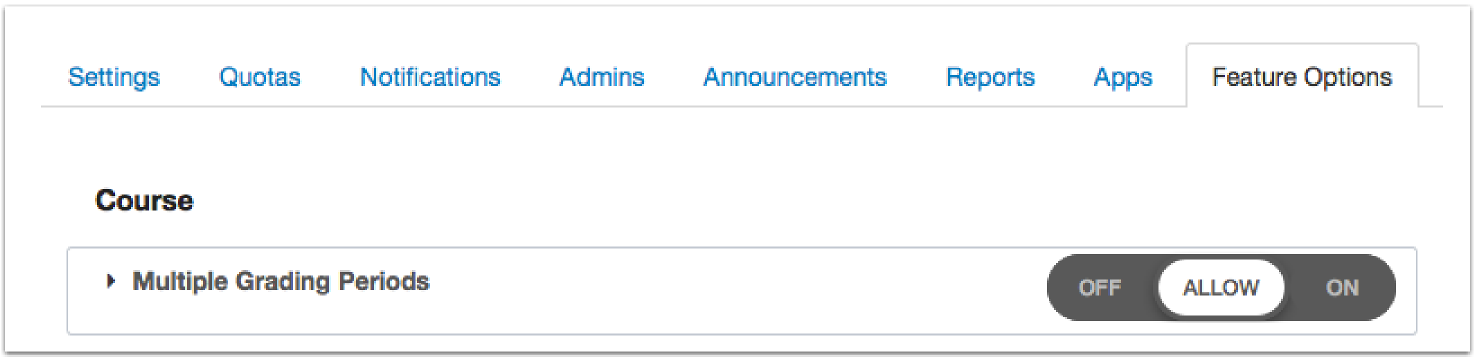
Recurring Calendar Events must be configured with the support of your Canvas Customer Success Manager (CSM) before it can be enabled for your institution. Please contact your CSM for assistance.

Recurring Calendar Events allows instructors to create multiple copies of an event every day, week, or month. However, once events are created, they are not linked together and are treated as independent events.

Details

- Released in beta September 8, 2015
- Released in production September 19, 2015
- View the [Recurring Calendar Events] lesson in the Canvas Instructor Guide

Multiple Grading Periods



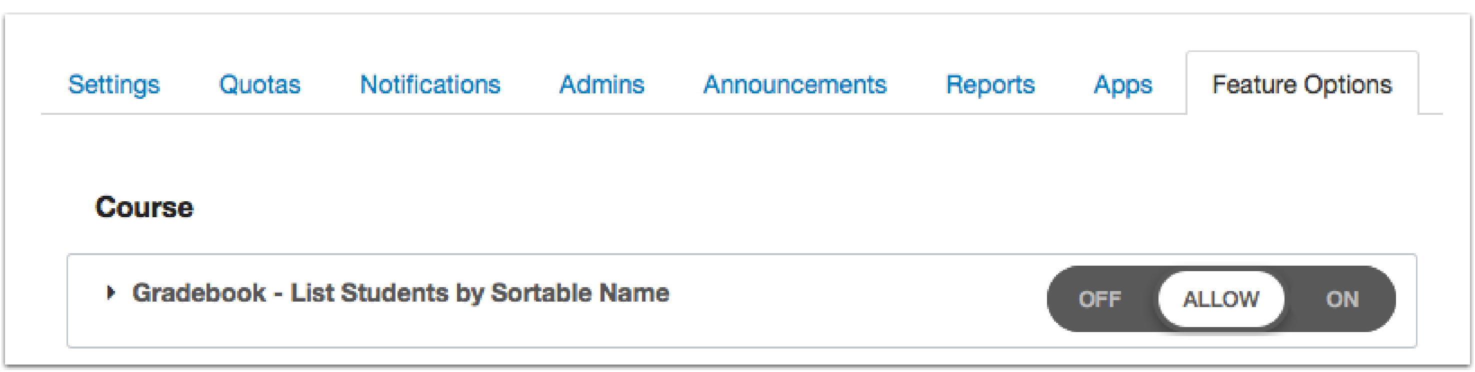
By default this feature is set to Allow.

Multiple Grading Periods allows instructors to create separate grading periods within a specific course. This feature was specifically designed for institutions that include a course during multiple terms and allows instructors to specify course work within a specific term.

Details

- Released in beta May 4, 2015
- Released in production June 27, 2015
- View the [Multiple Grading Periods] admin lesson

Gradebook - List Students by Sortable Name



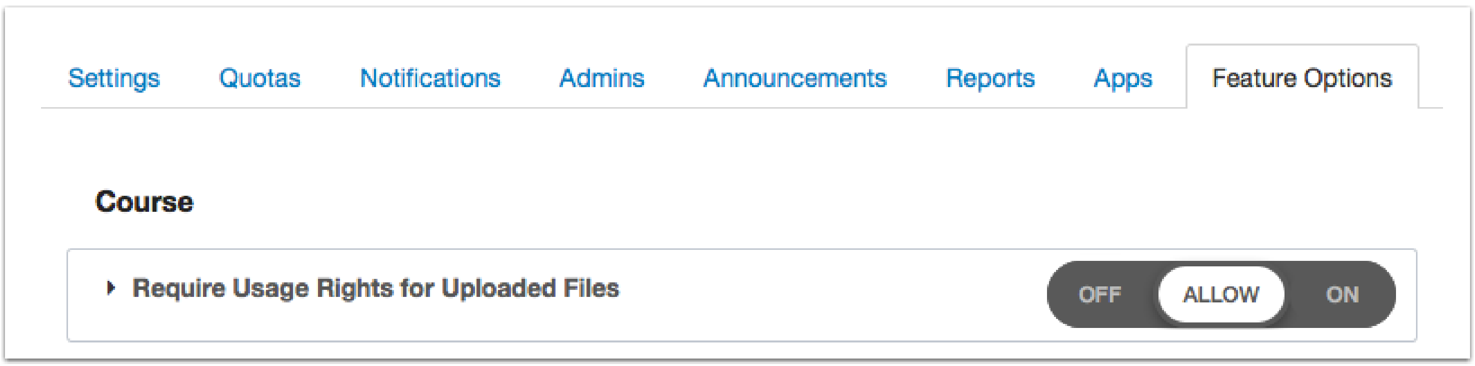
By default this feature is set to Allow.

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.

Details

- Released in beta December 10, 2014
- Released in production December 20, 2014
- View the Sortable Name Gradebook lesson in the Canvas Instructor Manual

Require Usage Rights for Uploaded Files



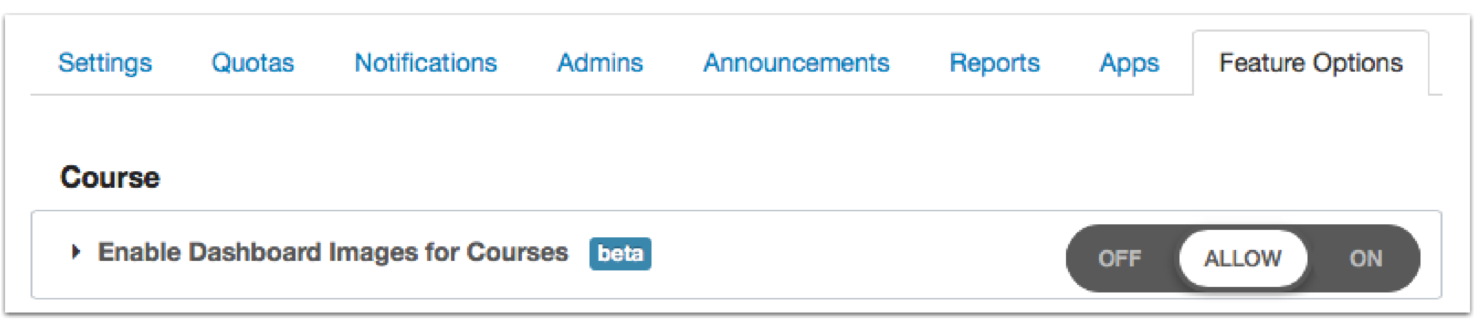
This feature will always be a feature option in Canvas. Require Usage Rights for Uploaded Files must be configured with the support of your Canvas Customer Success Manager (CSM) before it can be enabled for your institution. Please contact your CSM for assistance.

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
- View the Usage Rights lesson in the Canvas Instructor Guide

Enable Dashboard Images for Courses



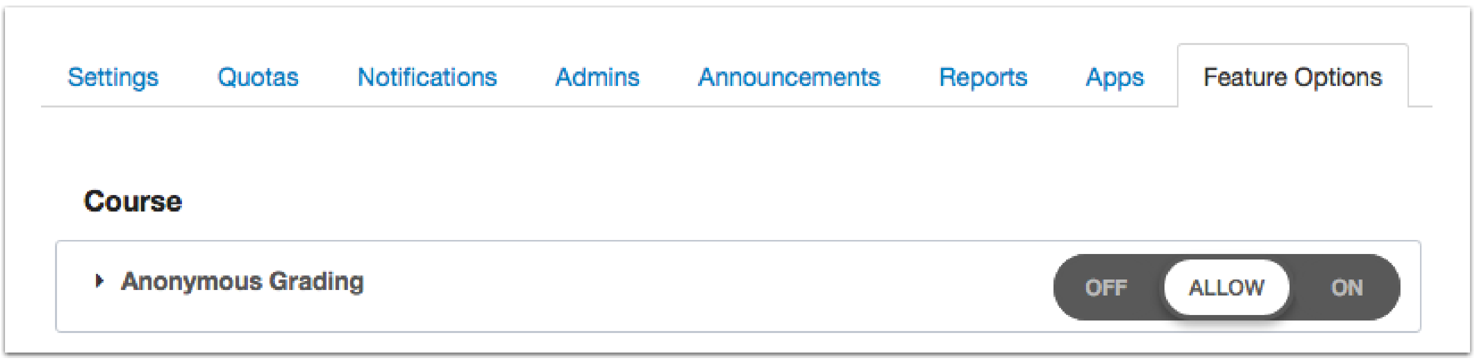
By default this feature is set to Allow.

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
- View the Course Card Images lesson in the Canvas Instructor Guide

Anonymous Grading



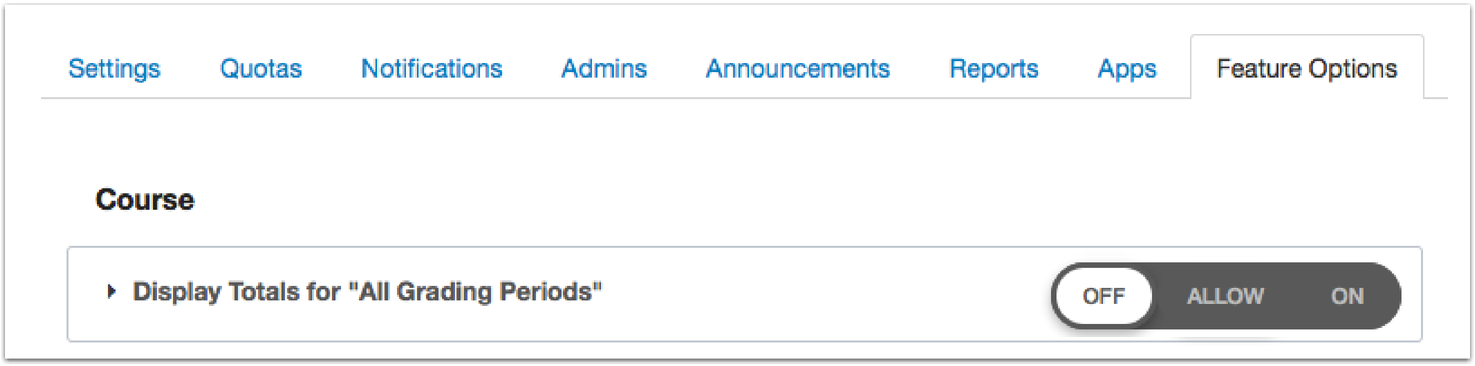
By default this feature is set to Allow.

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.

Details

- Released in beta November 30, 2015
- Released in production December 19, 2015
- View the Anonymous Grading lesson in the Canvas Instructor Guide

Display Totals for All Grading Periods



This feature can only be used in conjunction with the Multiple Grading Periods feature option. By default this feature is set to Off.

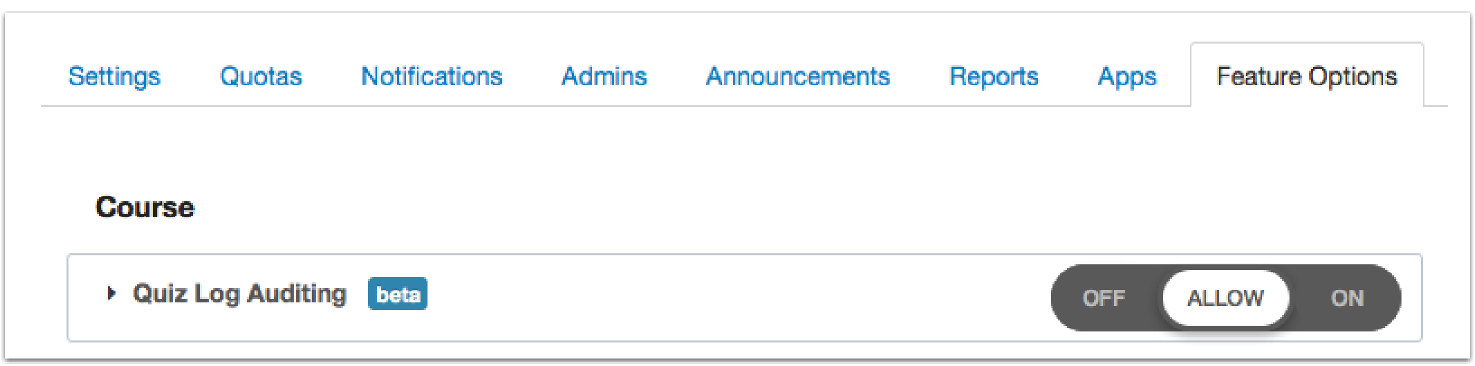
Display Totals for All Grading Periods complements Multiple Grading Periods. This feature allows users to view the **All Grading Periods** option in the grading periods drop-down menu and view total grades and any assignment group totals in the course. The total grade within an individual grading period is not affected and can always been viewed in the course.

This feature affects the global Grades view, courses Grades view, and the instructor Gradebook.

Details

- Released in beta October 31, 2015
- Released in production November 21, 2015
- View the [Multiple Grading Periods] lesson in the Canvas Instructor Guide

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
- View the Quiz Log lesson in the Canvas Instructor Guide

How do I access the Canvas beta environment?

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 Sunday. 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.

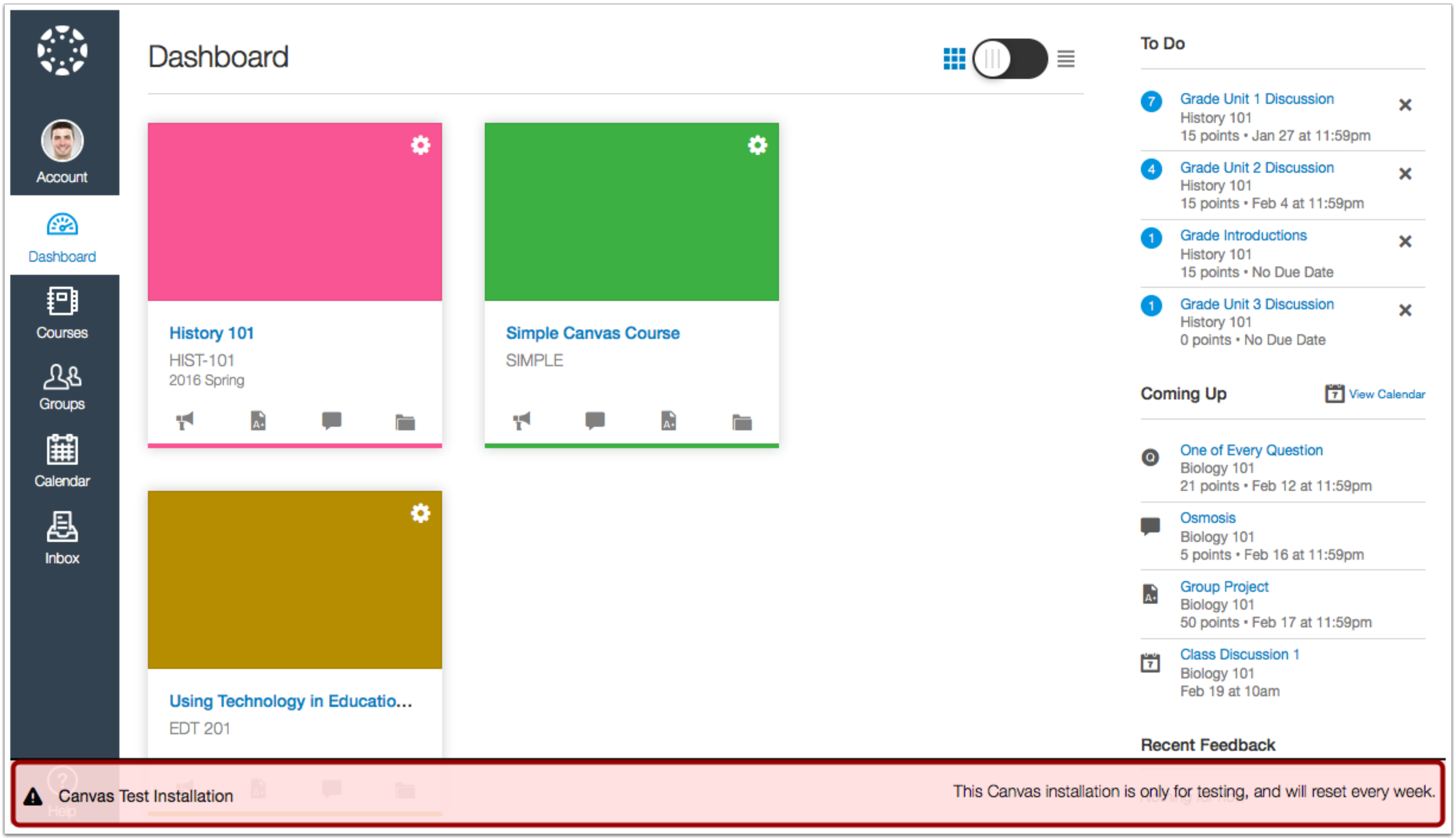
Notes about the Beta Environment:

- All users can access the Canvas beta environment, but students cannot access course content beyond the Course Home Page; 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 beta environment
- Crocodoc (annotation tool in SpeedGrader) is not available in the beta environment
- Any changes you want to keep in the beta environment must be made directly within the production environment before beta is reset
- SCORM is not available in the Canvas beta environment
- Account-level user page views always reflect activity from the production environment

Access Beta Environment

To log in to your beta environment, type **[organization name].beta.instructure.com** into the URL field.

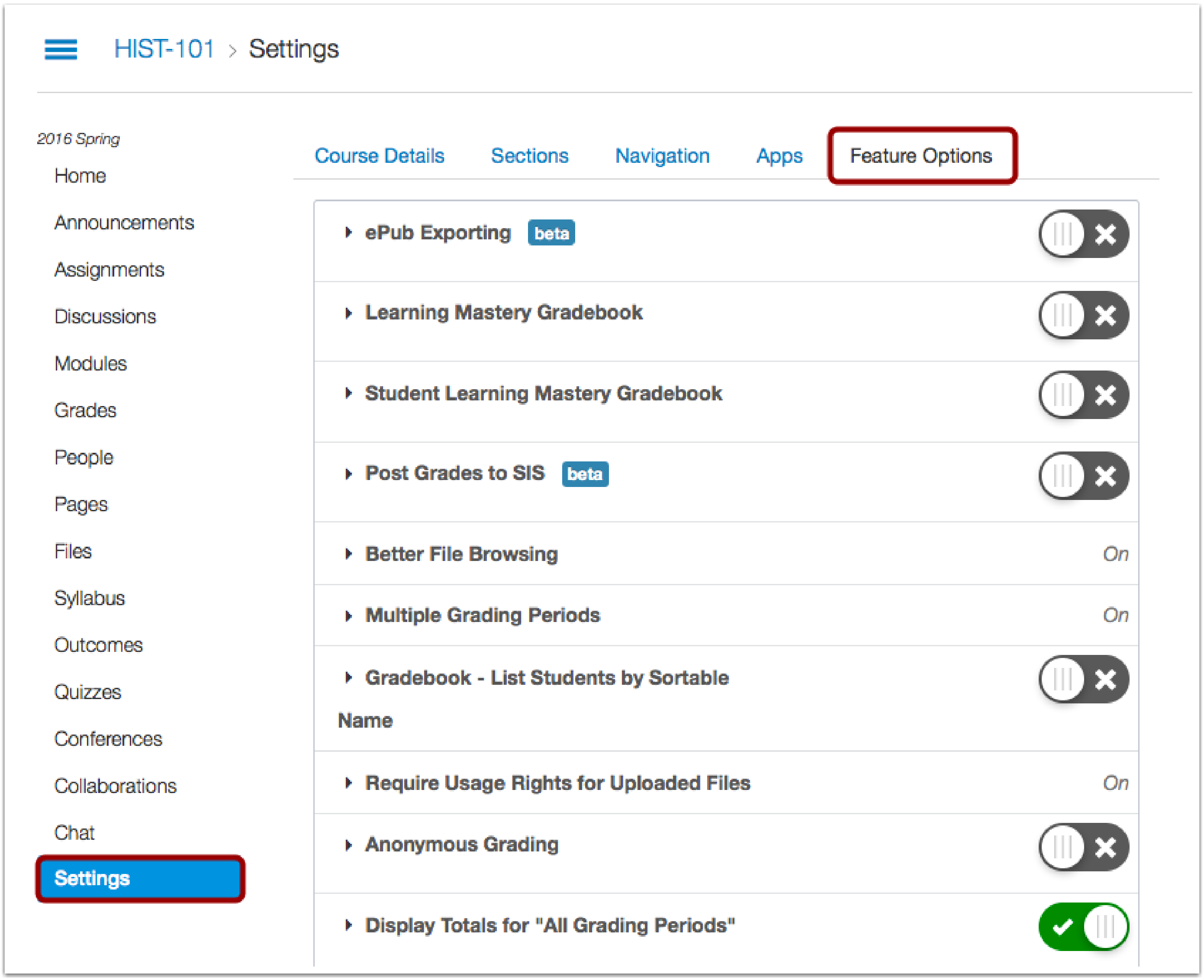
View Test Installation Message



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. Learn how to manage new features for [an institution]() or an [individual course]().

How do I access the Canvas test environment?

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.

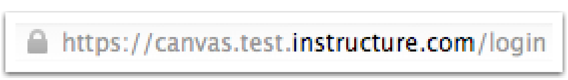
If you want to keep up on the latest production features in Canvas, visit the Release Notes page in the Canvas Community.

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:

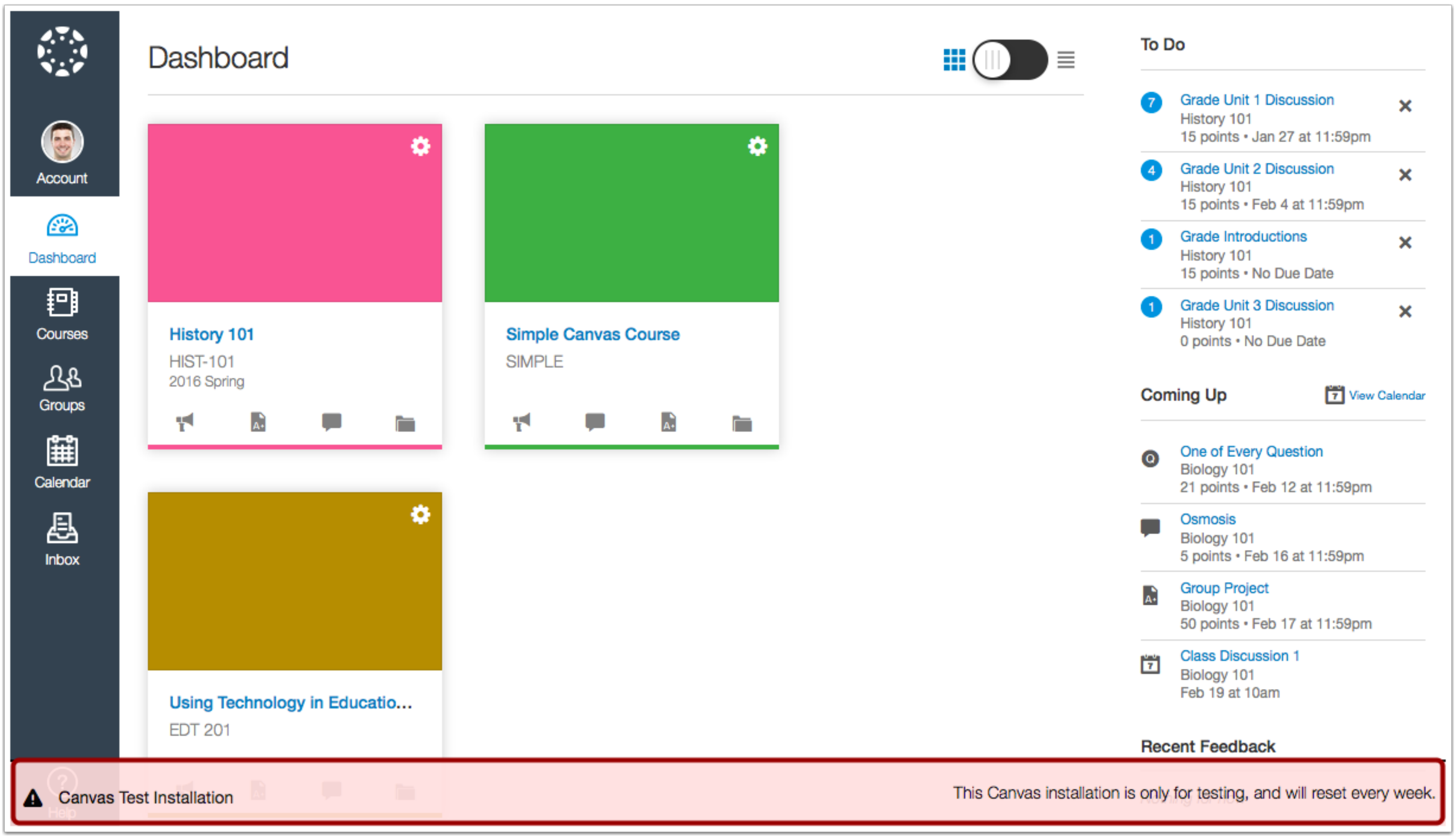
- All users can access the Canvas test environment, but students cannot access course content beyond the Course Home Page; if you are an admin and want to allow students to view all course content, please contact your Customer Success Manager
- Notifications, including course invitations and report downloads, cannot be sent in the test environment
- Crocodoc (annotation tool in SpeedGrader) is not available in the test environment
- SCORM is not available 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
- Account-level user page views always reflect activity from the production environment

Access Your Test Environment



To log into your test environment, type **[organization name].test.instructure.com** into the URL field.

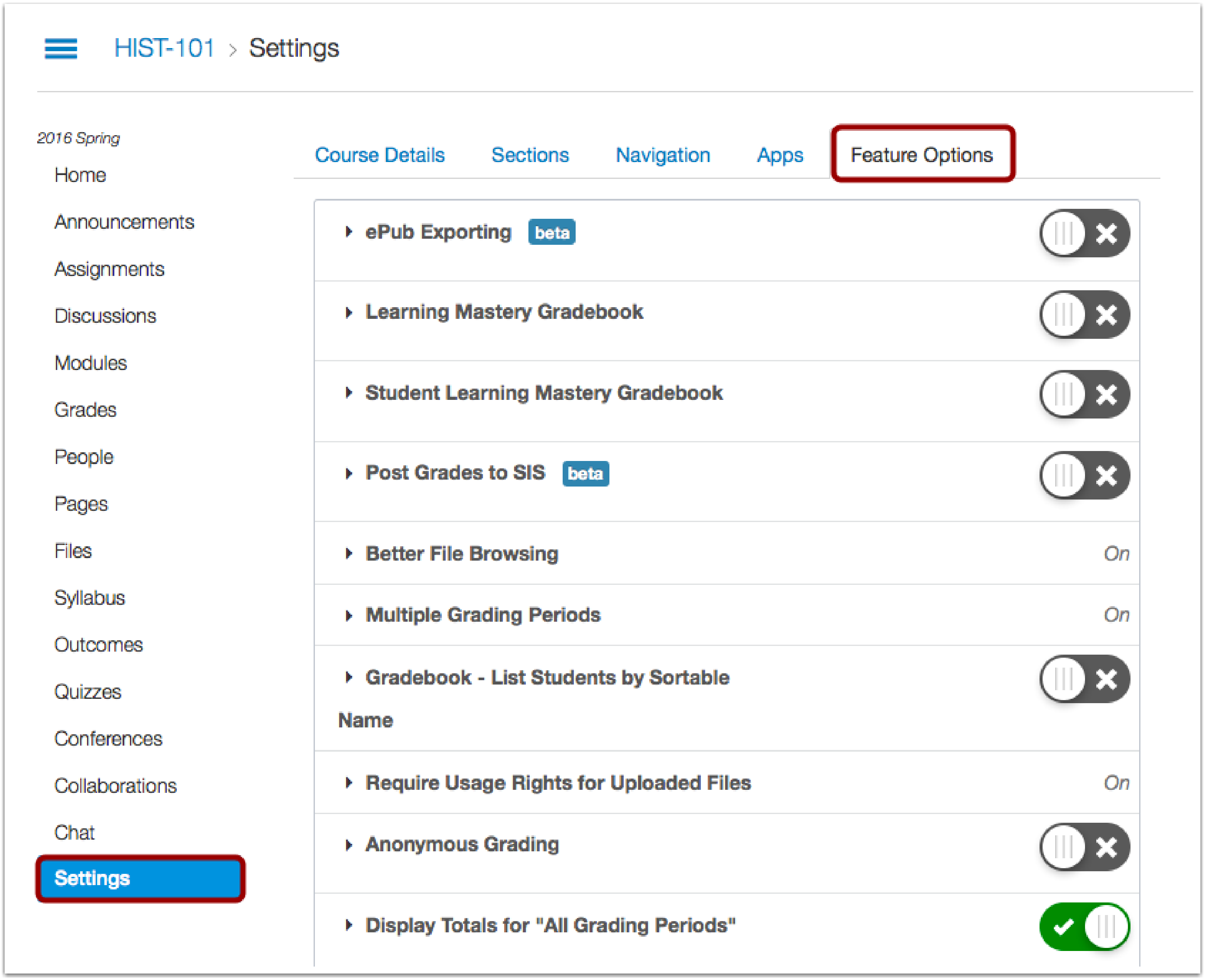
View Test Installation Message



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. Learn how to manage new features for an institution or an individual course.

SIS Imports

What are SIS Imports?

The SIS Imports feature allows you to upload and integrate data from various Student Information Systems (SIS), complex databases, and even simple spreadsheets as comma separated value (CSV) files. Admins can use this feature to create users, accounts, courses, enrollments, and more.

Only admins with the correct permissions can import and manage SIS data. For more information please see the Canvas Account Permissions PDF.

View a video about SIS Imports.

When would I use SIS imports?

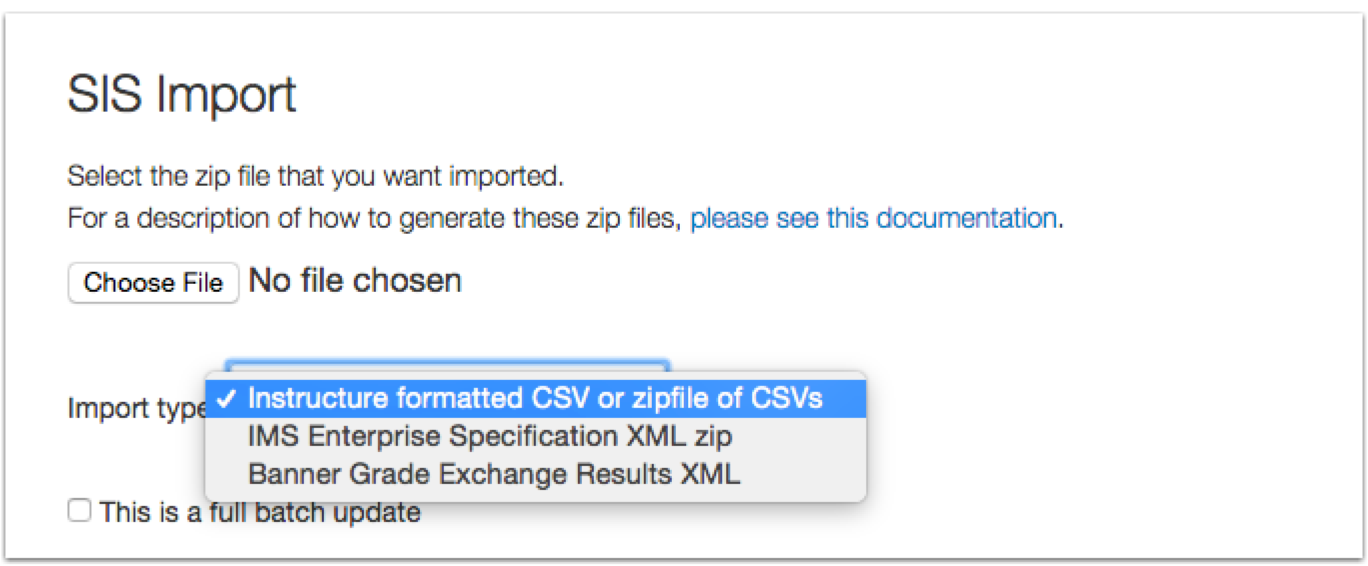
With SIS imports, you can:

- Import SIS data with CSV files or automatically import via the Canvas API
- Import SIS data with IMS Enterprise Specification XML zip files
- Import SIS data with Banner Grade Exchange Results XML
- Create an automated data integration with Canvas

Before importing SIS information, practice importing data to 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.

Learn how to practice using the API to manage SIS data.

Import Types

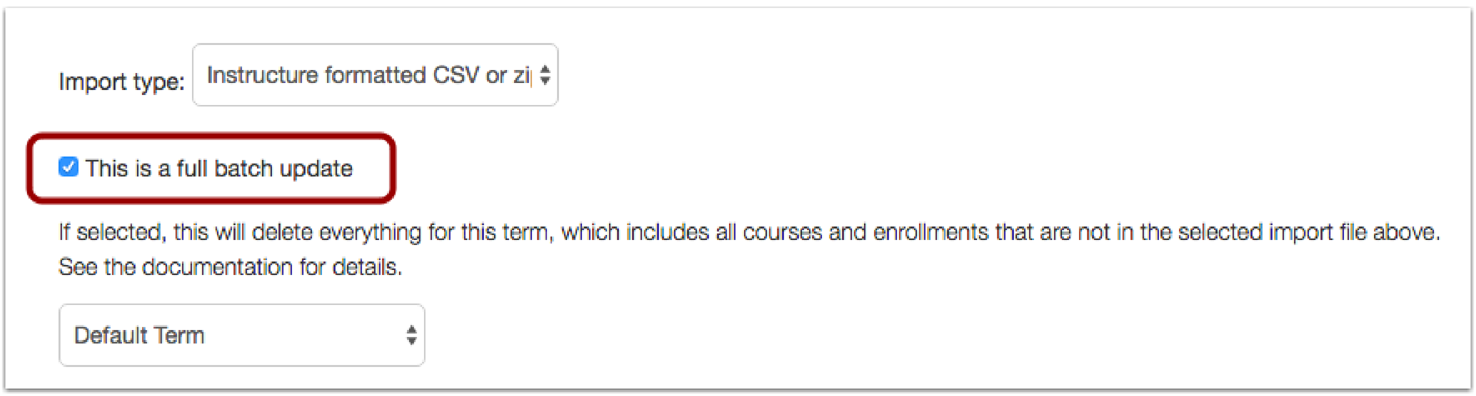


The SIS Import page supports a few formats for standard imports to Canvas: Instructure formatted CSV or zipfile of CSVs, IMS Enterprise Specification XML zip, or Banner Grade Exchange Results XML.

A standard import only processes changes that are specifically listed in the upload file and is an efficient way to upload a few records. For example, if a student enrollment was listed as active in a prior import but not present in the current enrollment, no change will take place to the student enrollment. The enrollment will remain active until marked as deleted or completed in a standard import (or is marked as not present in a Full Batch update for the term where the course is listed). During the beginning of a term, course enrollments change regularly; submitting a standard import frequently helps keep enrollments current in an account.

When uploading SIS data with CSV files, 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 using the Instructure format for importing files, the files should be in the following order: users, accounts, terms, courses, sections, enrollments.

Full Batch Updates



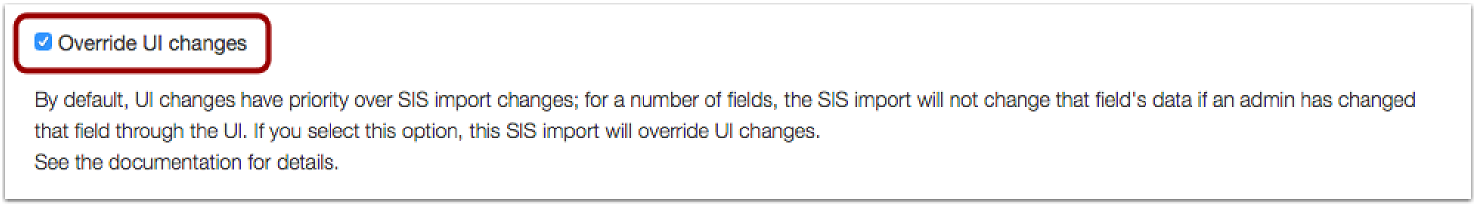
Canvas supports full batch updates for each import type. With this option, any courses, sections, or enrollments with an SIS ID record in Canvas that is linked to a selected term can be deleted. For enrollments, this option means the linked user and course/sections require SIS IDs. A Canvas record will be deleted if it is not included in the current import file.

This option can delete large data sets without any prompt or warning for confirmation and affects data created in previous SIS imports.

Full batch updates are useful if:

- Your source SIS software doesn't have a way to send delete records as part of an import, and you need to remove a fair portion of the imported data
- You want to be sure your current enrollment and data set are consistent with your SIS enrollment and course data
- Your SIS doesn't track changes to course state or enrollments for students and/or teachers
- You want to delete courses that you have migrated to Canvas from another LMS

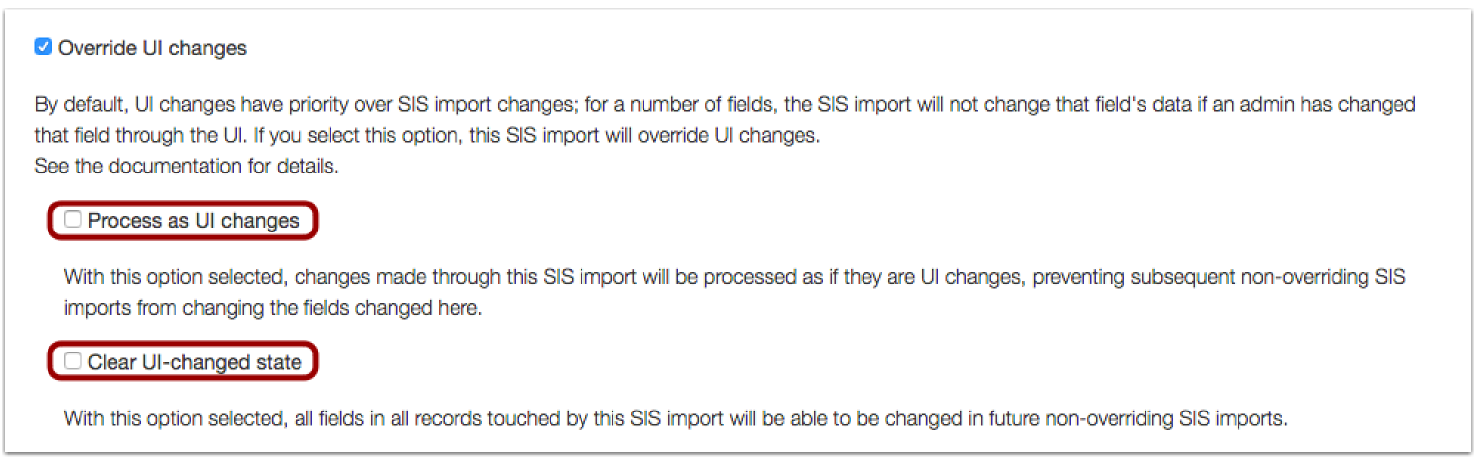
UI Overrides



Canvas supports user interface (UI) overrides through SIS imports. When a user makes a change to imported data in Canvas (e.g., changes an email address), this change is "sticky" and is set as the new default. Selecting the Override UI option allows Canvas to overwrite any "sticky" data updated in the Canvas UI. Otherwise, attempting an import with conflicting data would be disregarded and the existing user data would not be changed. Learn more about sticky fields in Canvas.

This option may be useful if:

- You forgot to restrict user options in account settings, such as allowing users to change their names, delete their institution-assigned email address, etc., and you want to run an update to be sure they are in sync. Note that this will NOT impact the user's display name if they changed it. Only the full name and sortable name would be changed.
- You allowed them to change their names (above example) on purpose, but want to periodically sync with your current data.
- You want to maintain control over the names of users and courses, or if you know a name change occurred for a user or course.



Overriding UI changes also allows one of two additional options: process as UI changes or clear UI-changed state.

Process as UI changes. This option 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.

This option may be useful if:

- You don't want subsequent imports to overwrite the data you are currently importing.

Clear UI-changed state. This option 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".

This option may be useful if:

- You accidentally checked the "Process as UI changes" option and you need to fix the affected data.
- You forgot to remove the ability for users to rename themselves, course names, or remove the institutional email and you want to clear the stickiness of the UI changes that have occurred.

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.

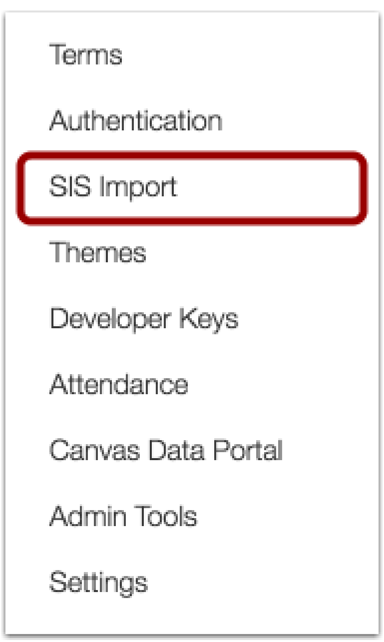
The SIS Import page supports a few formats for standard imports to Canvas: Instructure formatted CSV or zipfile of CSVs, IMS Enterprise Specification XML zip, or Banner Grade Exchange Results XML. Files can be set for a full batch update and to override UI changes. **Please ensure you are aware of the risks associated with these upload options.** For more details, please view the SIS Imports lesson.

Confirm your data is imported correctly in your test environment before overriding live data in your production environment.

Notes:

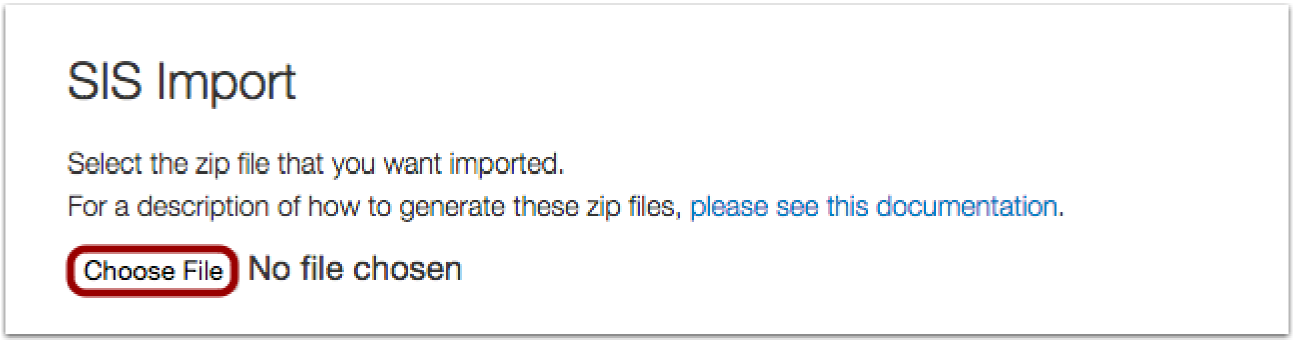
- SIS Imports must be enabled by your Customer Success Manager before files can be uploaded to your account.
- Importing SIS files is an account permission. If you do not have access to manage SIS files, your institution has restricted this feature.
- Before setting permission for a user role, you must 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



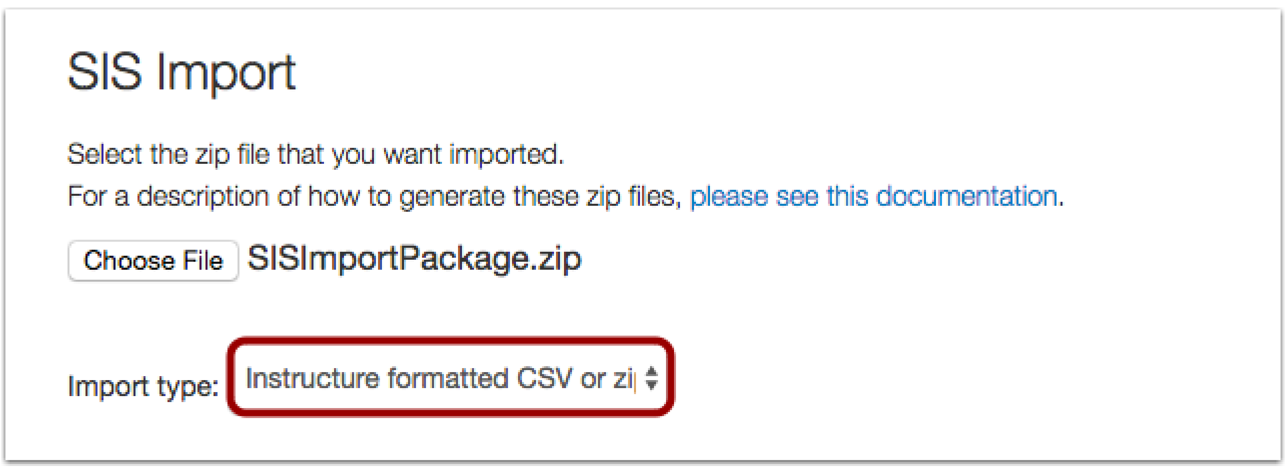
In Account Navigation, click the **SIS Imports** link.

Select File



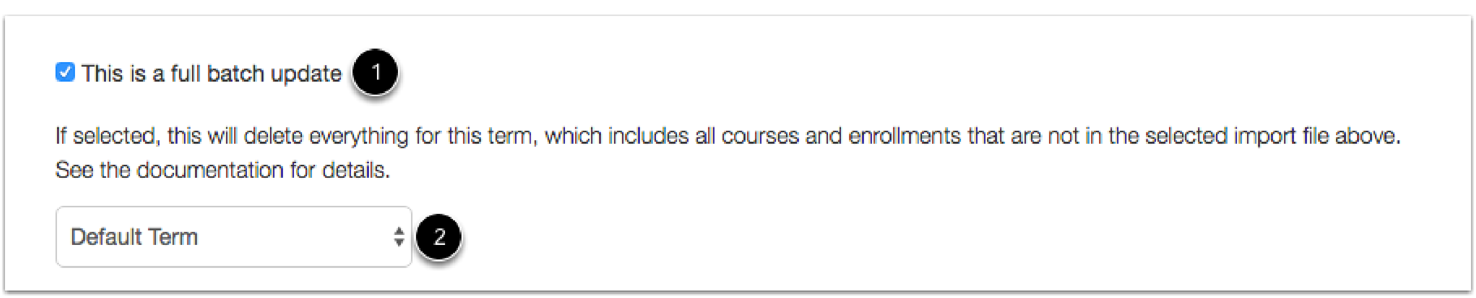
Click the **Choose File** button and locate the SIS import file from your computer.

Select Import Type



In the **Import Type** menu, select the type of import you are uploading into Canvas. By default, the menu selects the CSV import option.

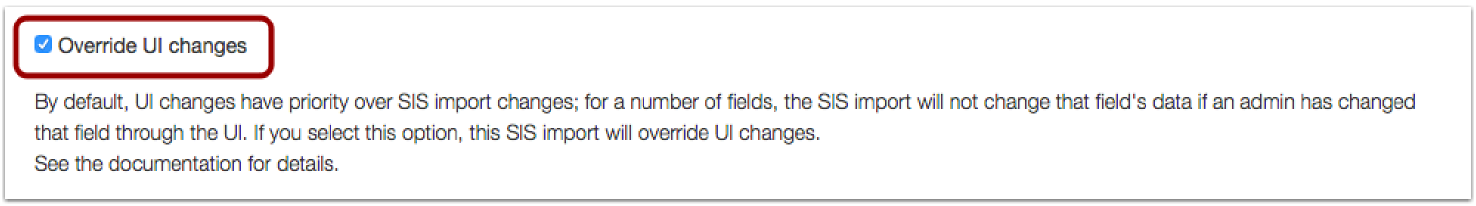
Set Full Batch Update



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.

Note: Ensure you are aware of the associated risks before selecting this option.

Override UI Changes



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 your 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

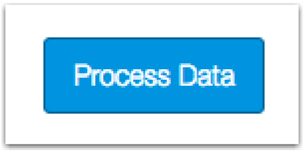
Overriding UI changes also allows one of two additional options: process as UI changes or clear UI-changed state. You can only select one option.

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

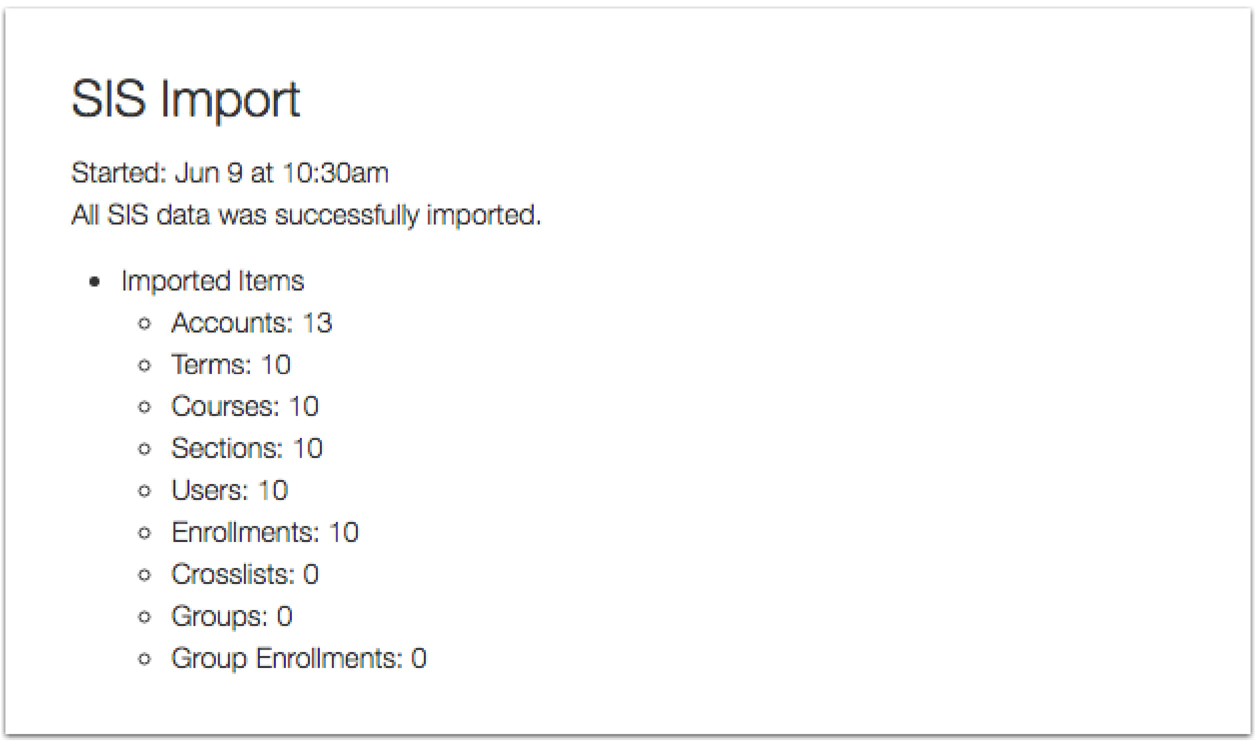
- **Clear UI-changed state [2]**: removes the "stickiness" of all data that exists in this import; future imports with this data will not indicate any data in the UI as "sticky"

Process Data



Click the **Process Data** button.

View Import Data



When the import has processed, Canvas displays the results of the imported file, along with any errors. 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.

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 an 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. When any of this data is modified in the User Interface (UI), Canvas will set the new values as "sticky." When a new basic upload is performed, the data existing in Canvas will remain "sticky" and any imported data that would attempt to update that data will be ignored. Learn more about sticky fields.

An import can override UI changes only if the proper options are selected when using the SIS Import tool.

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.

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 Fields*

- ***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. If the user already has a password (from previous SIS import or otherwise) it will *not* be overwritten. This password must be at least 6 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.
- **first_name:** This is the given (first) name of the user.
- **last_name:** This is the surname (last) name of the user.
- **full_name:** This is both the given and surname of the user.
- **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 Fields*

- ***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.

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 Fields*

- ***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.)

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."

Download a sample courses.csv file with 10 courses; they reside within their respective sub-accounts in a specific term.

Required Fields*

- ***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 called the "Course 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 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.
- **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.
- **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.)

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 Fields*

- ***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.
- ***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.
- **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)

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 Fields*

- ***course_id: (Required if the section_id is missing)** This is a unique identifier for the course where the user will be enrolled. 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).

- ***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. 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.

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 account-level groups and course-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 Fields*

- ***group_id:** This is the unique identifier used to reference your group. It must not change for the group, and must be globally unique.
- **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.
- ***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 Fields*

- ***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.
- ***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 Fields*

- ***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 Fields*

- ***observer_id:** This is the unique identifier of the observer.
- ***student_id:** This is the unique identifier of the student.
- ***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.

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

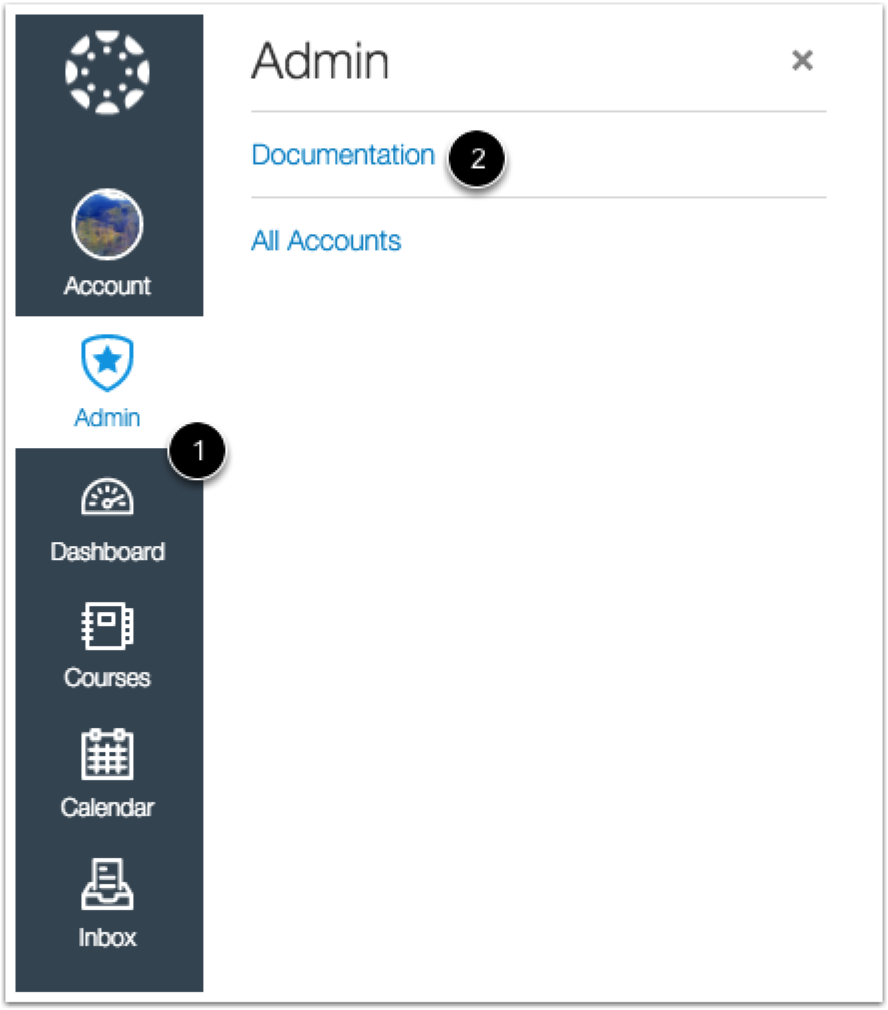
To avoid affecting data in your production environment, you may want to set up your SIS integration in your test environment for accurate testing. Every three weeks, the day after a new Canvas production release, your production environment will create an updated copy for your test environment so you 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

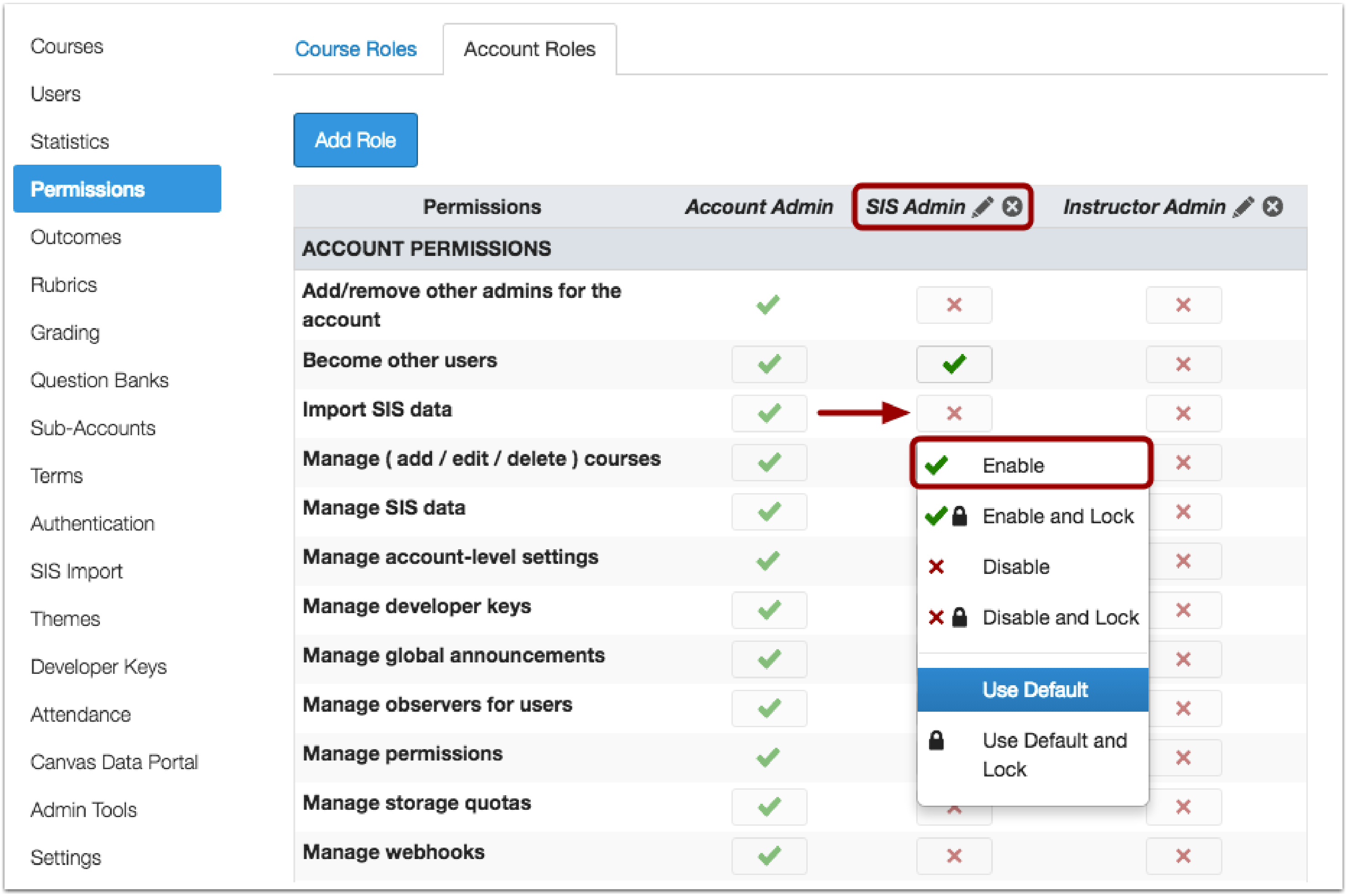
- Canvas Community Migrations and Integrations Group
- Canvas API Documentation
- SIS Imports via Canvas API (automated)
- SIS Imports via Canvas UI (manual)

Open Account



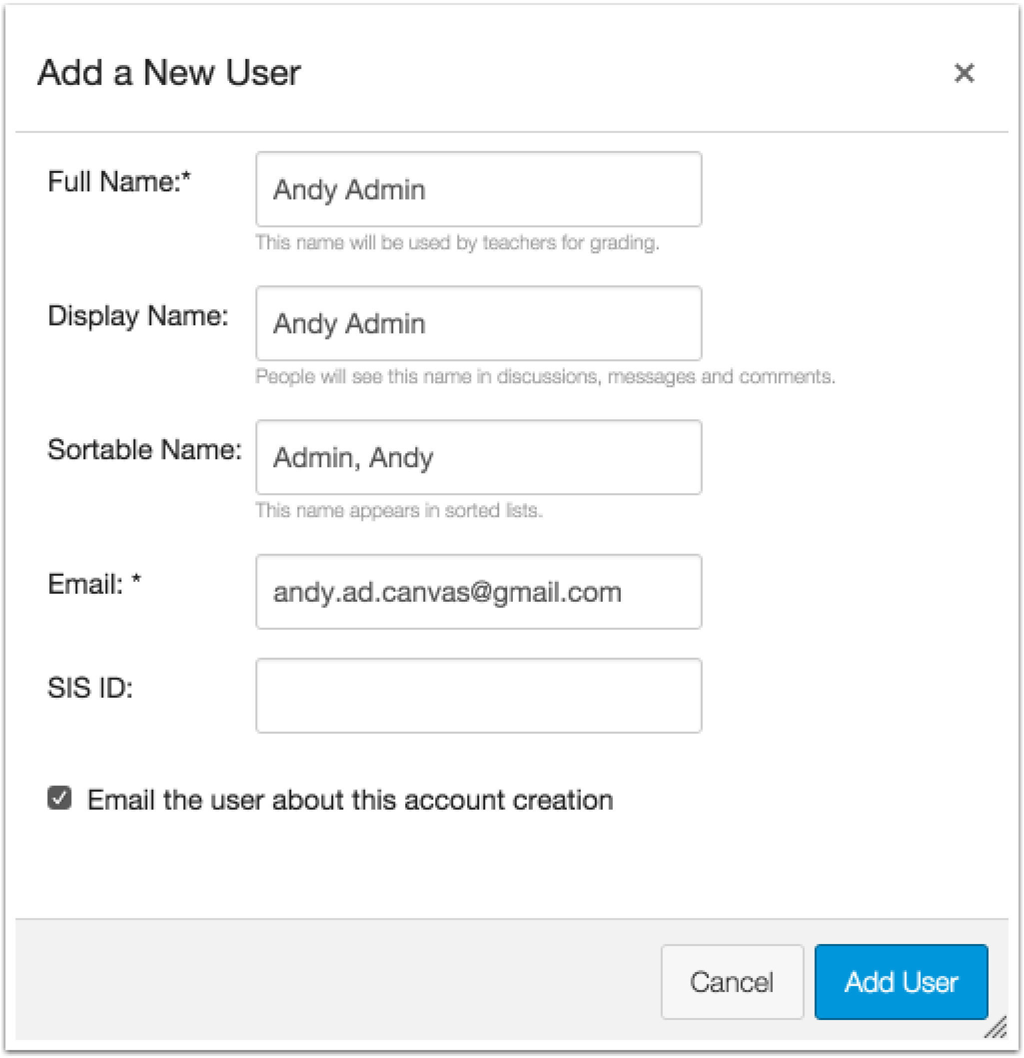
Click the **Admin** link [1], then click the name of the account [2].

Modify User Role and Permissions



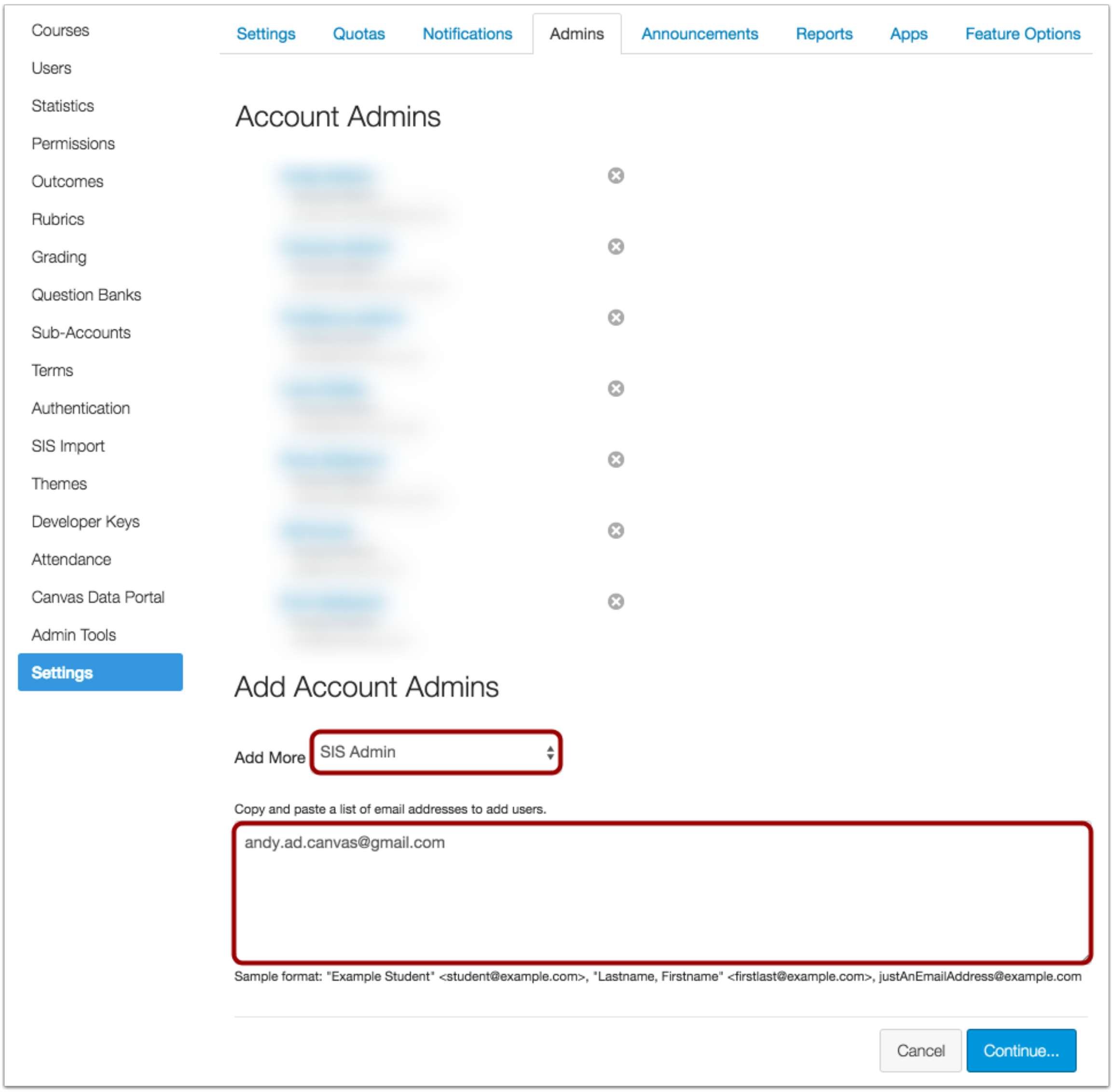
In Account Settings, open the Permissions link. In the Account Roles tab, create an account-level user role and enable the account-level SIS data permission. If you do not want to create a new user role, you can use an existing user role and modify the permissions.

Manually Add New User



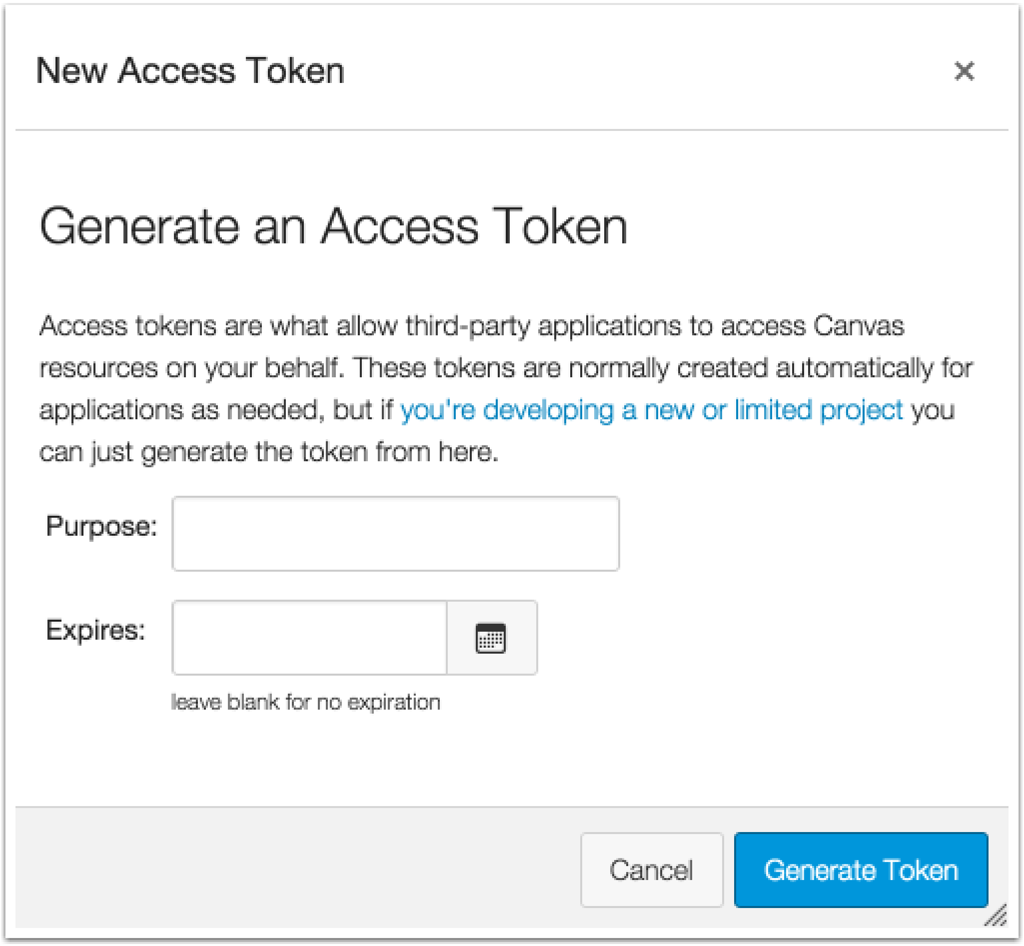
You'll need to manually add a new user to manage the SIS data. You can use an existing user imported via SIS, but manually creating a new user is beneficial for security purposes. This new user will end up with only one permission, but that one permission grants the ability to create, modify, and delete many object types in Canvas.

Add User as Admin



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

```
curl -H "Authorization: Bearer <api_token>" 'https://<canvas_fqdn>/api/v1/accounts/self/
sis_imports/<import_id>'
```

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 & Linus (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 cURL 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\Pthat 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):

```
curl -F attachment=@test_course.csv -H "Authorization: Bearer <api_token>"
'https://<canvas_fqdn>/api/v1/accounts/self/sis_imports.json?import_type=instructure_csv'
```

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:

```
{"created_at":"2014-02-27T13:03:39Z","ended_at":null,"updated_at":"2014-02-
27T13:03:39Z","progress":0,"id":6670997,"workflow_state":"created","data":{"import_type":"instructure_csv"
```

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

```
curl -H "Authorization: Bearer <api_token>" 'https://<canvas_fqdn>/api/v1/accounts/self/
sis_imports/<import_id>'
```

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:

```
{"created_at":"2014-02-27T13:03:39Z","ended_at":"2014-02-27T13:03:39Z","updated_at":"2014-02-
27T13:03:39Z","progress":100,"id":6670997,"workflow_state":"imported","data":{"import_type":"instructure_cs
```

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.

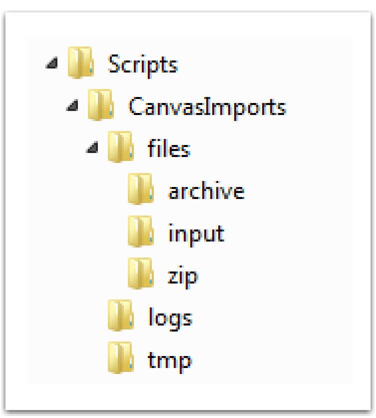
Script Programming Languages

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 scructure 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.

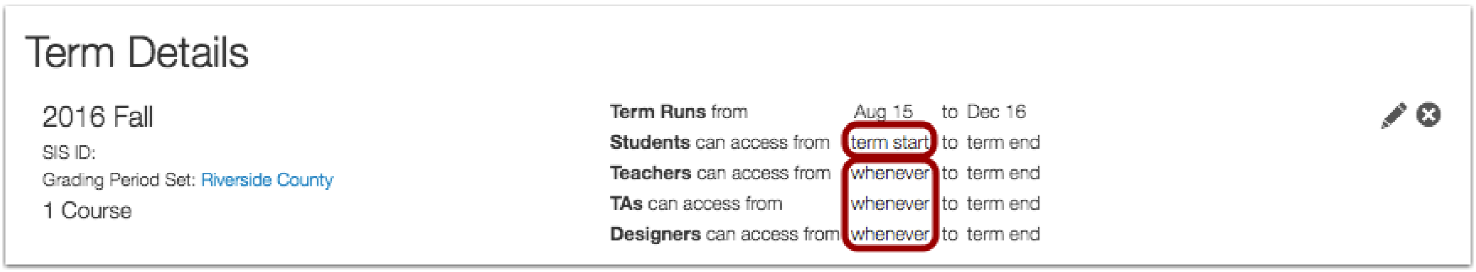
Terms

What is a term?

The basic function of a term is to give a default set of start and end dates to any course assigned to that term. Terms can be added manually or created through SIS imports.

View a video about Terms.

Default Terms

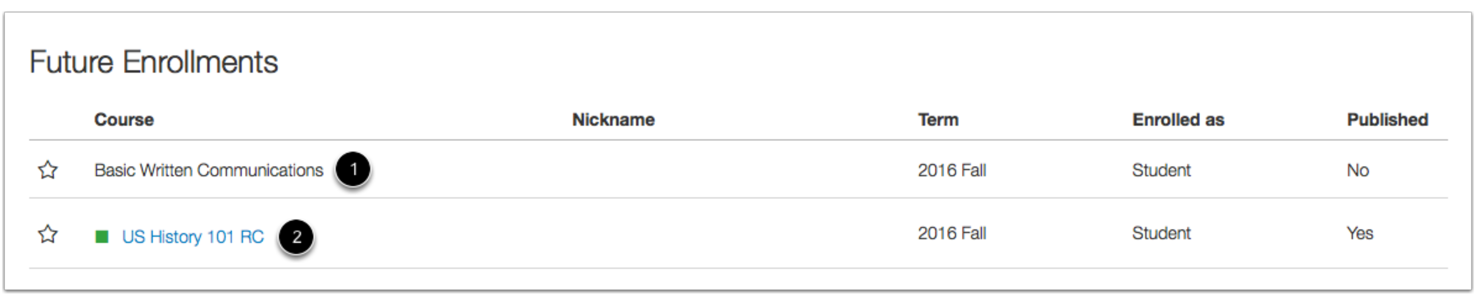


Once you have set dates for the entire term, the default settings for Canvas user roles are:

- 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.

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.

Term Access



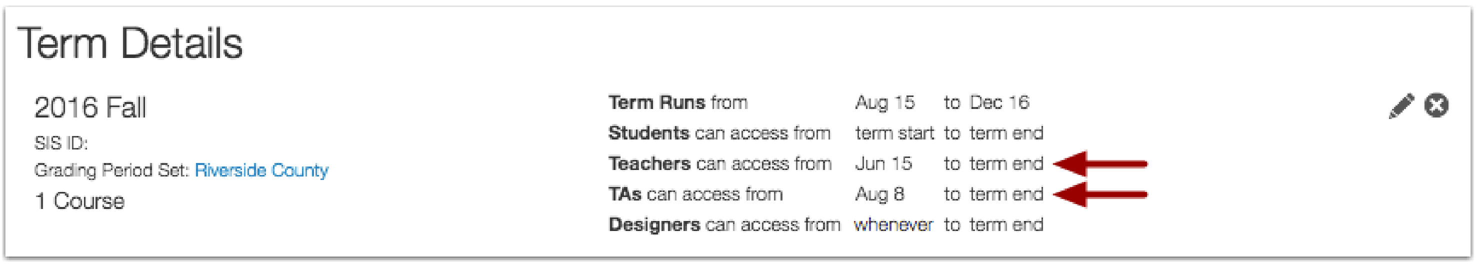
Once a user is added to a course, terms set default dates for when users have access to courses assigned to that term. *Access* relates to unpublished courses.

If a course is unpublished [1], students cannot have access to any course content until the start date of the term. However, not all courses conform to the term dates, as course start dates may override the term dates. Course overrides may be before or after the start of the term. Learn how term dates work with course and section dates.

If a course is published [2], students are able to view content before the start of the term or course date. However, they cannot fully participate in the course, such as submitting an assignment or contributing to a discussion topic. On the start date, students can fully participate in the course.

Some institutions may choose to publish their courses on the same day as the term start date, so prior access to course content is not an issue. However, if your institution prefers to allow instructors to publish their own courses ahead of the term start date, learn how to restrict student access. You can also restrict access to students from being able to view a course after it has ended.

Custom Role Dates



If necessary, you can set specific access dates for each user role. Note that a change to the Teachers, TAs, and Designers start dates affects their ability to access unpublished courses in the term.

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.

Learn how to create term dates.

Note: SIS imports cannot specify specific dates for each user group. Those dates must be changed manually.

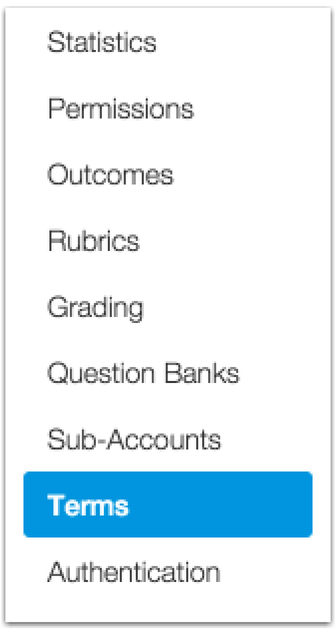
How do I create term dates in an account?

The basic function of a term is to give default start and end dates to any course assigned to that term. Term dates should be set before adding any courses to your account. Learn more about terms.

If your institution uses grading periods, you can associate a term with a grading period set.

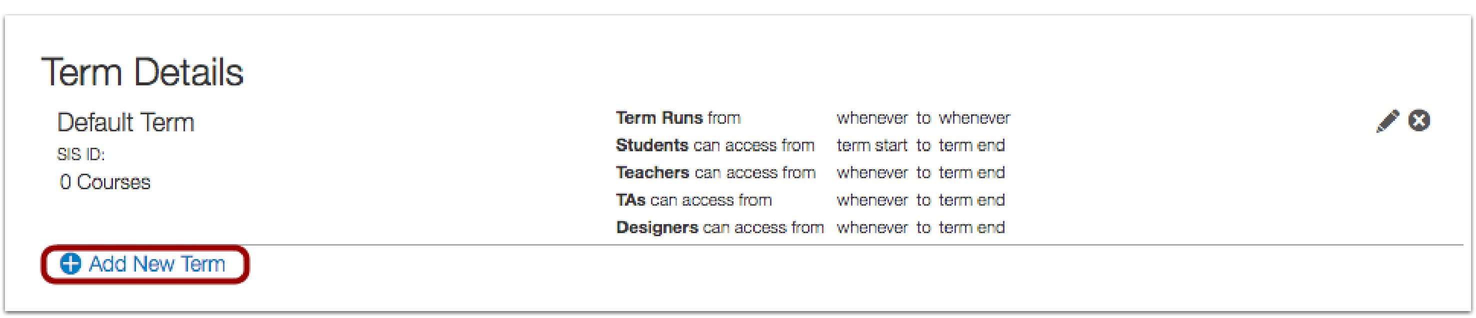
Note: Terms can also be created using SIS Imports.

Open Terms



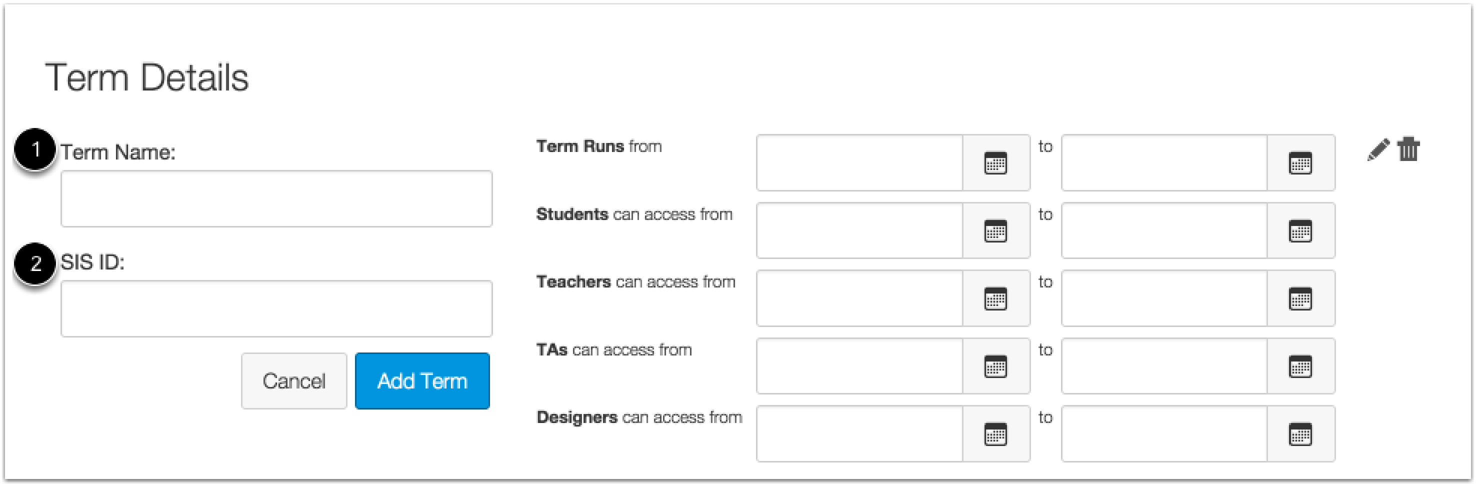
In Account Navigation, click the **Terms** link.

Add New Term



Click the **Add New Term** link.

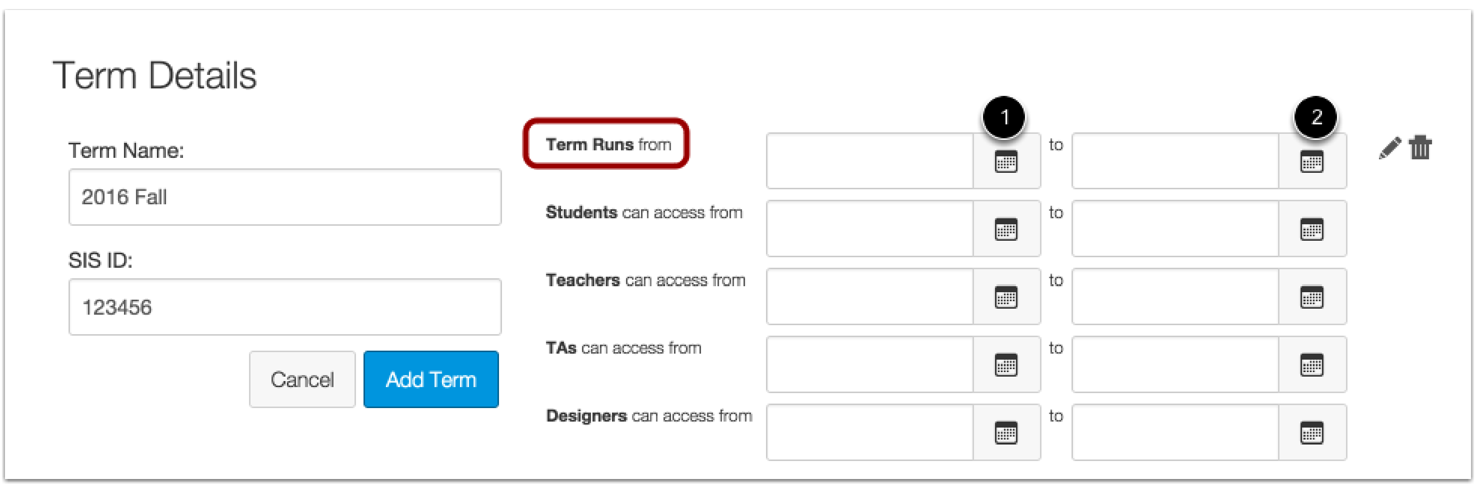
Add Term Details



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].

Add Term Dates

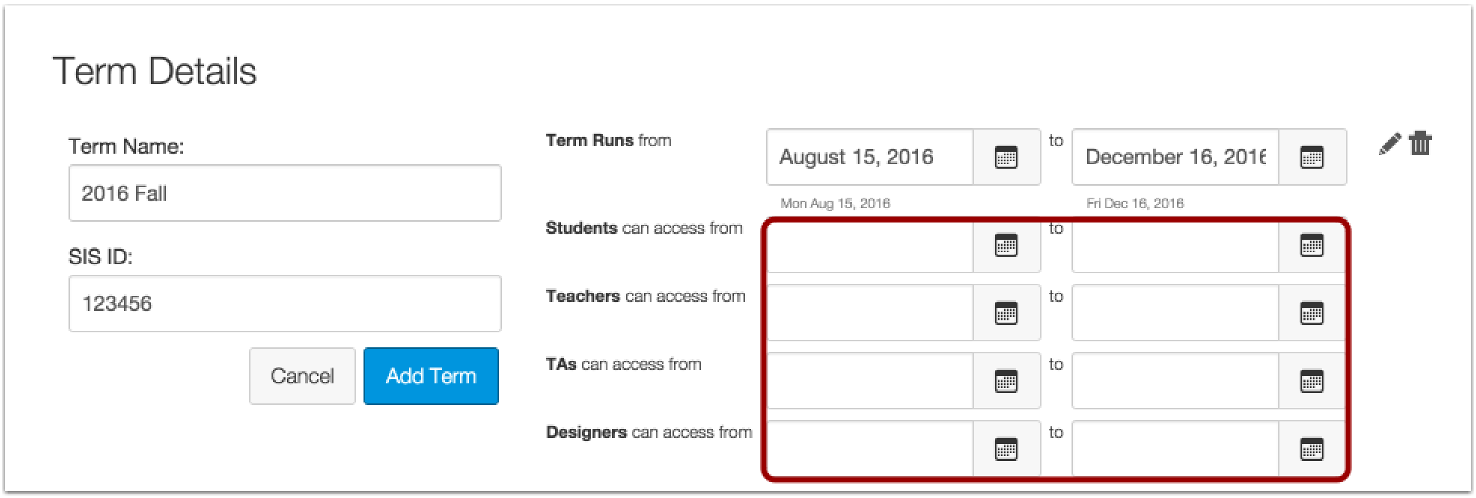


In the **Term Runs from** line, use the calendar icons to set a term start date [1] and term end date [2].

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: Unlike other dates in Canvas, term dates do not support times. Setting a time as part of a term date does not apply. By default, 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. For instance, setting an end date of December 16 means December 15 is the last full day users can access the course.

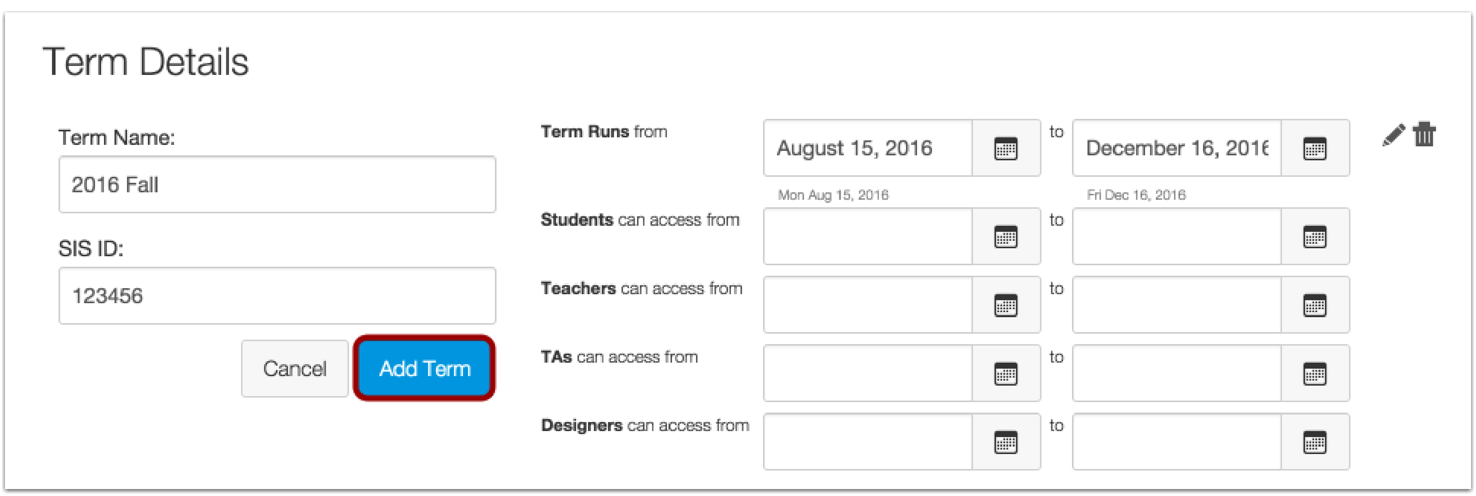
Add User Dates



If necessary, you can set specific access dates for each user role. To set start and end dates for a user role, locate the role and set dates for that role.

Note: Changing the Teachers, TAs, and Designers start dates affects their ability to access unpublished courses in the term.

Add Term



When you are finished adding term dates, click the **Add Term** button.

Manage Term

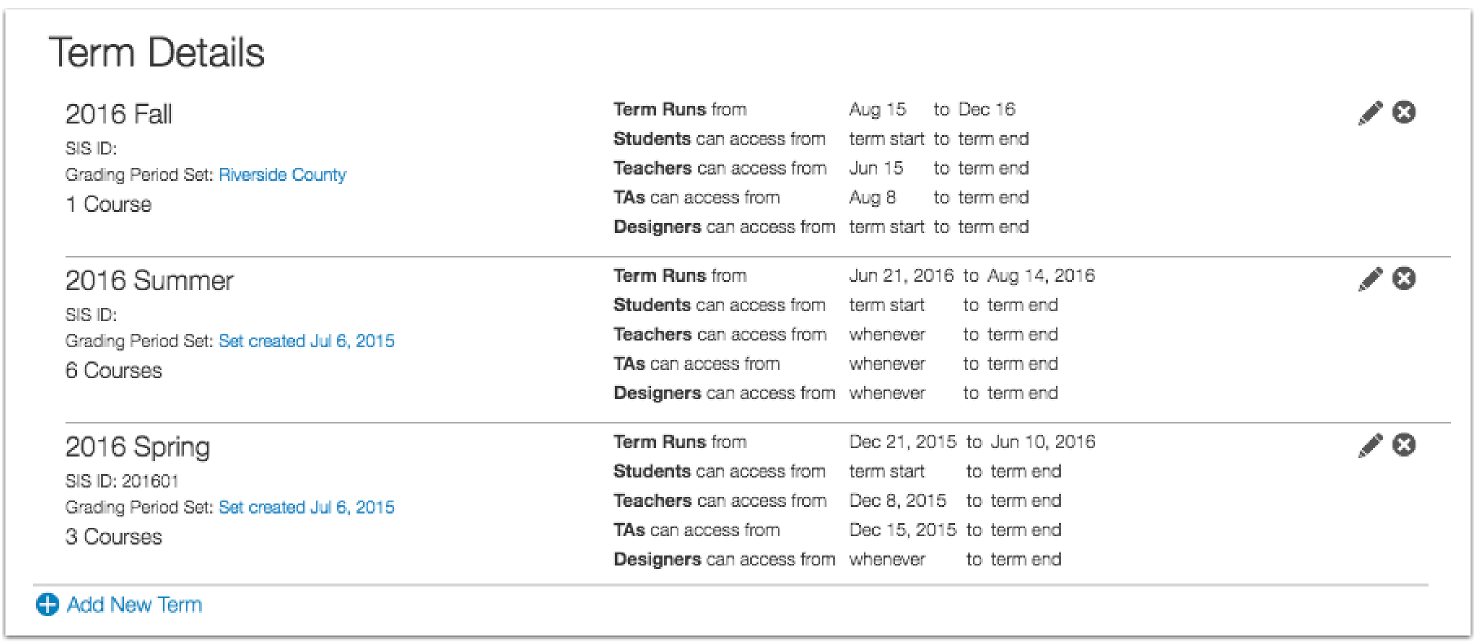
To edit the term details, click the **Edit** icon [1]. To delete the term (without courses), click the **Delete** icon [2].

Note: Once a term has courses in it, it cannot be deleted.

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.

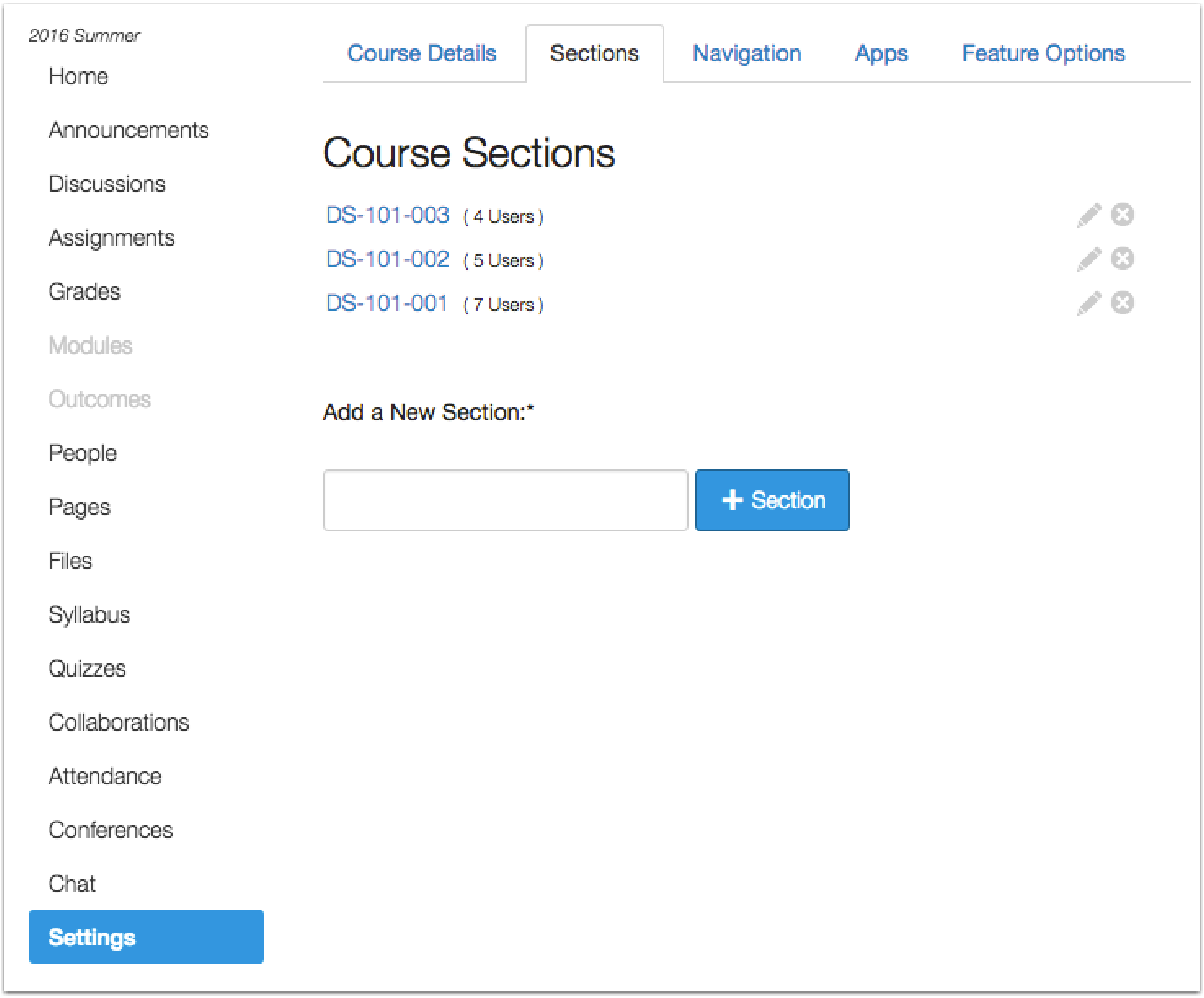
Create Term



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. To learn more about cross-listing, visit the How does cross-listing work in Canvas lesson.

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.
- Another fact, if a quiz was used as an extra credit quiz or a survey, it will need to be turned back to a quiz before being copied.

- 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).

How do I use term dates, course dates, and section dates in Canvas?

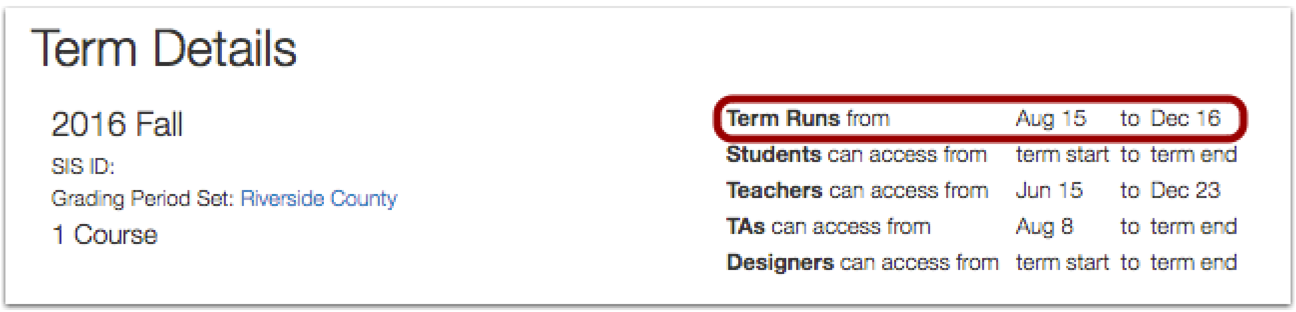
Term dates, course dates, and section dates are very symbiotic. All of them flow together in all aspects of Canvas. Various dates allow different users to participate in the course.

When a term, course, and/or section date has concluded, the course is placed in a read-only (archived) state. Read-only means that the course is not available for submitting assignments, posting discussions, uploading files, grading, or any other action-based task within a course.

Term dates, course dates, and section dates can also be added through SIS imports.

In conjunction with this lesson, to see an example of how term dates, course dates, and section dates work together, view the Terms, Courses, and Section Enrollments PDF.

View Term Details

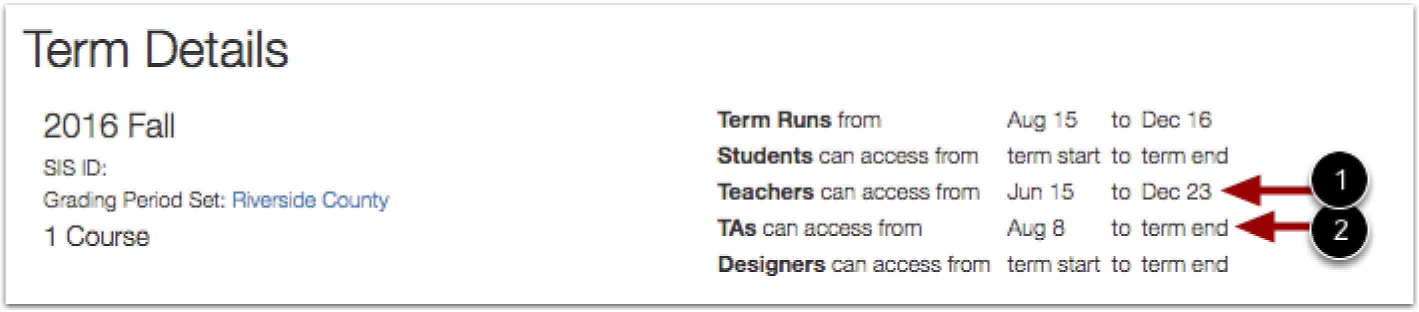


Term dates define a fixed period of time for an institution where users can participate in a course. Term dates can also be used for semesters, trimesters, or quarters. In this example, a term could run from August 15, 2016 to December 16, 2016.

Administrators have control over when specific users can participate in the courses. Unless otherwise specified, Students inherit the term start and term end date, while 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.

Term dates do not restrict students from completely viewing a course if the course is published before the start date. Administrators may need to restrict students (and observers, by association) from viewing course content in future and concluded courses. Learn more about terms.

Warning about End Term Dates



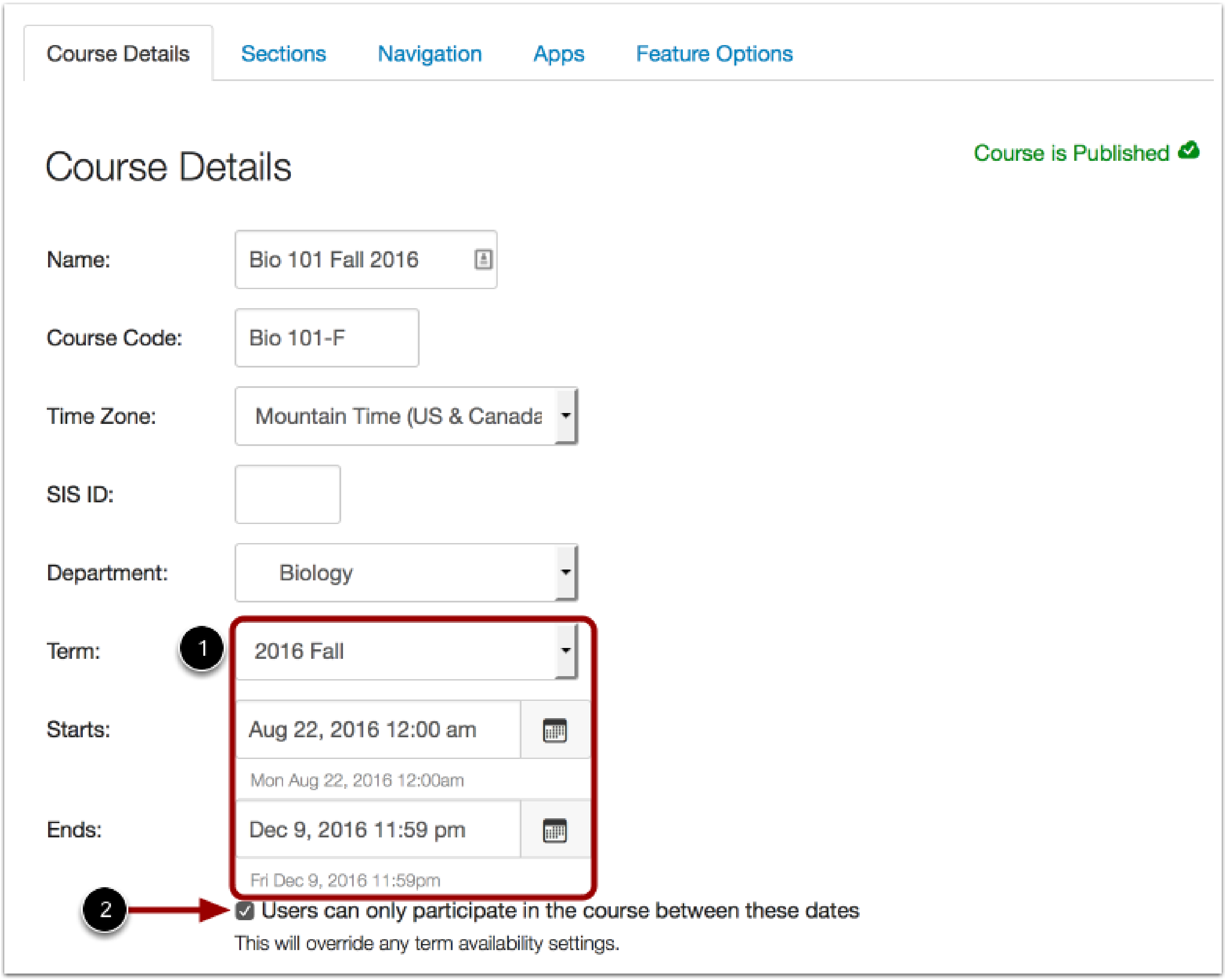
Unlike other dates in Canvas, *term dates do not support times***.** Setting a time as part of a term date does not apply. By default, user access is cut off at **midnight** on your indicated end date, meaning the previous day is the last full day that users have access to the term.

Again, in the example about access dates, the ending dates would be as follows:

- Instructors (teachers) [1] can access courses until 12:00 am on December 23, 2016 (last full day is December 22).
- Everyone else with a *term end* date [2] can access courses until 12:00 am on December 16, 2016 (last full day is December 15).

Note: Canvas currently does not generate a warning about term dates as it does for course dates.

View Course Dates

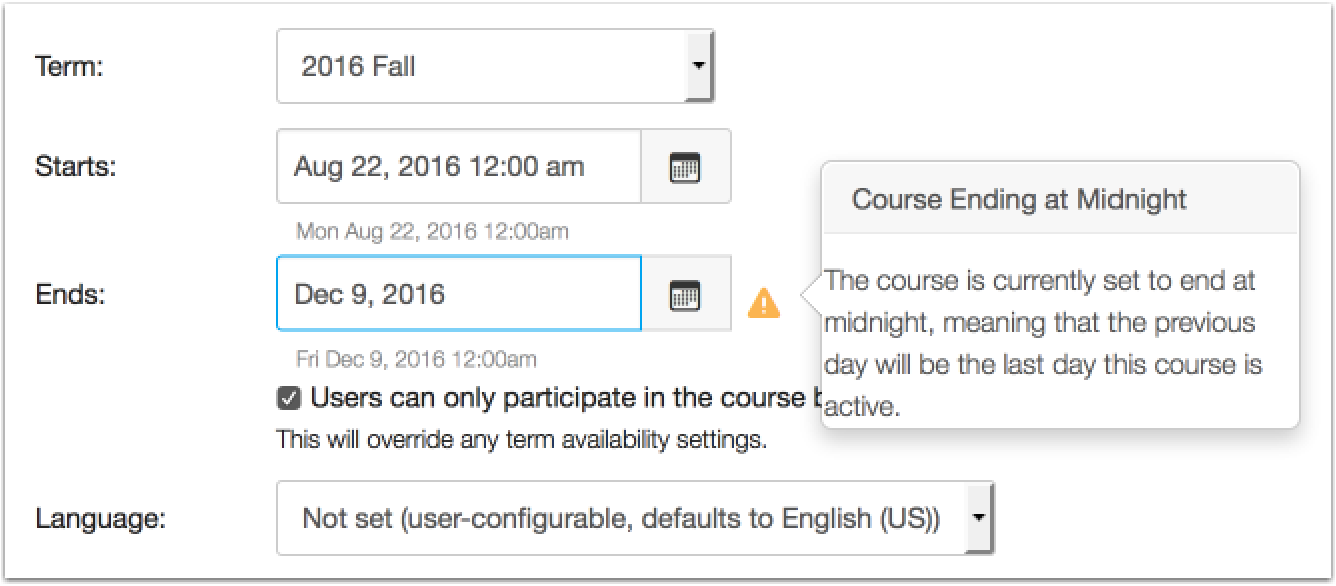


Course dates default to the term dates. However, you can change the course start and end dates to override the term dates. You can create course start and end dates [1] that are within the term or that extend past the term.

To apply the course dates, check the **Users can only participate in the course between these dates** checkbox [2]. This checkbox ensure that students can only participate in the course between the specified dates (instructors and admins are not affected).

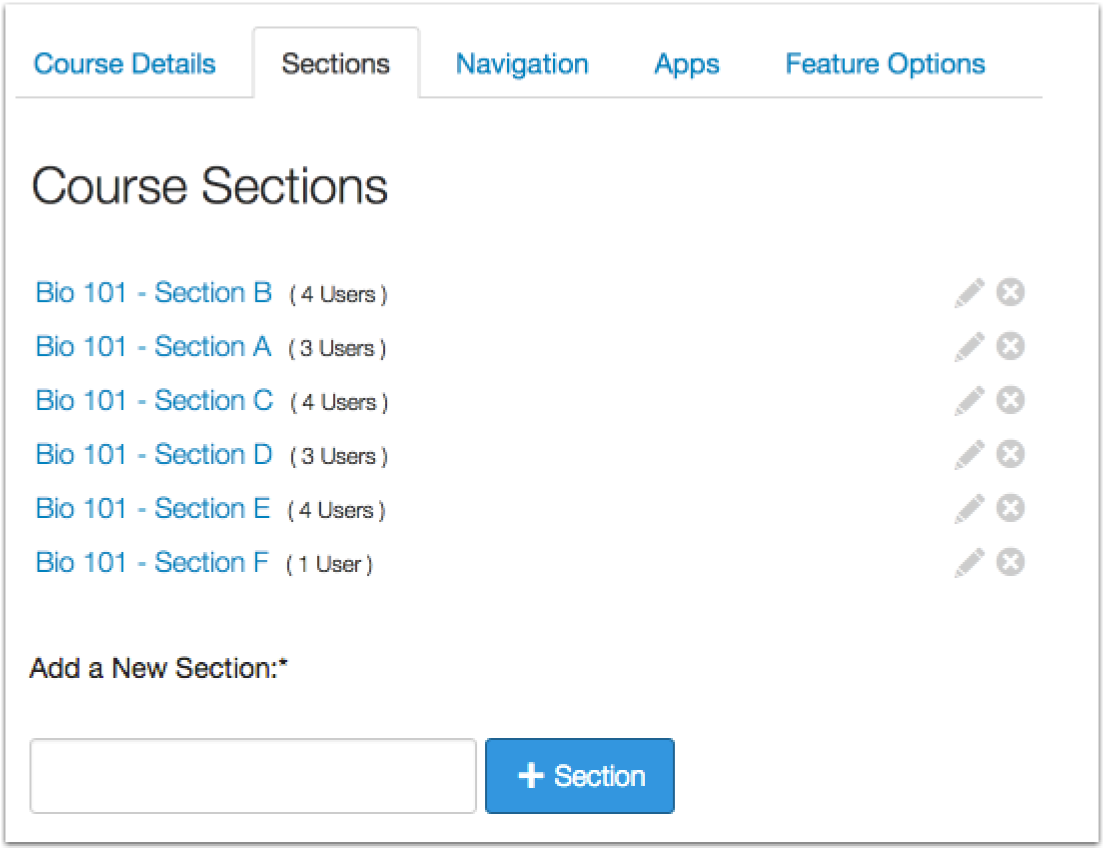
For example, if the term dates were August 15 to December 16, the instructor could set access to the course a week later on August 22 and end the course a week earlier on December 9. By shortening the course end date, and selecting the student participation checkbox, students will not have access to the course after that date, giving the instructor time to complete grading before December 23 (the course access end date set for instructors in the Term Details).

Warning about End Course Dates



Note: In your end date, if you do not set a time, or you set the end time to midnight, a warning icon will appear notifying you that the date prior to the set end date will be the last full day in the course; student access will be cut off at midnight on your indicated date. For instance, if the course were set to end December 9, the last full available date for the course would be December 8.

View Sections



The Section dates are the most mobile. Sections can be moved from term to term or course to course. Make sure the students are not concluded in the courses or sections before you move them.

Section dates default to the course dates, unless you also set up section override dates.

Sections can have various start and end dates. For example, Section B could be set with a start date of January 12, 2015 and end on April 24, 2015. Sections within the same course can share course material and have varied due dates. Learn how to edit section details.

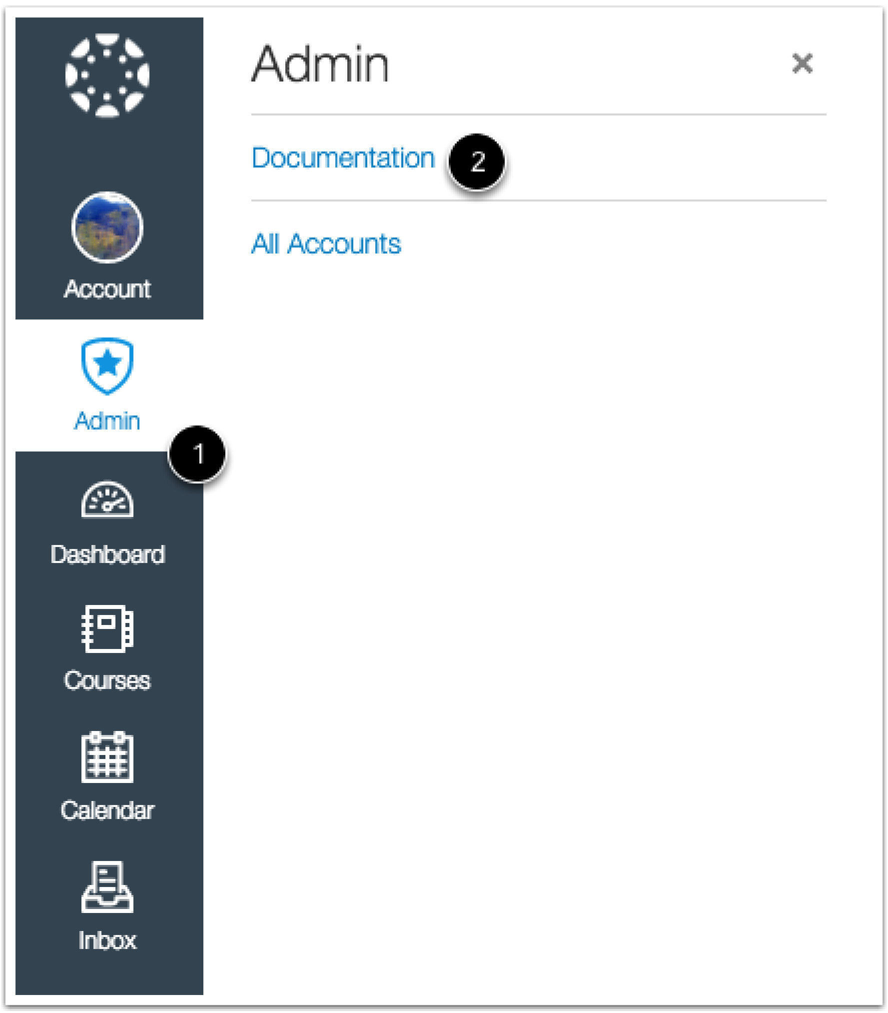
Users

How do I find users in an account?

There are multiple ways to find users in your account.

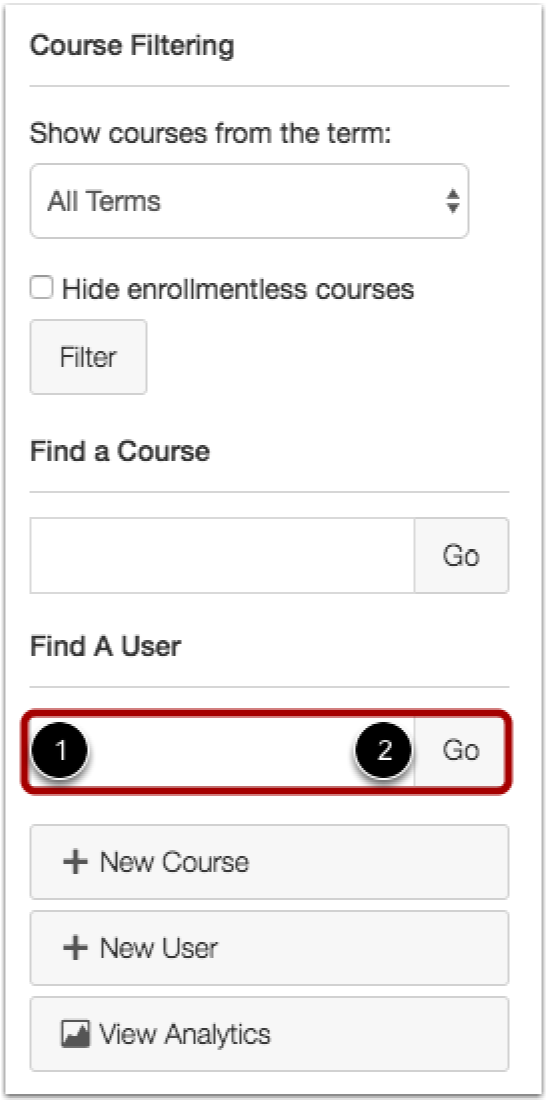
View a video about Users.

Open Account



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

Option 1: Find a User in the Sidebar

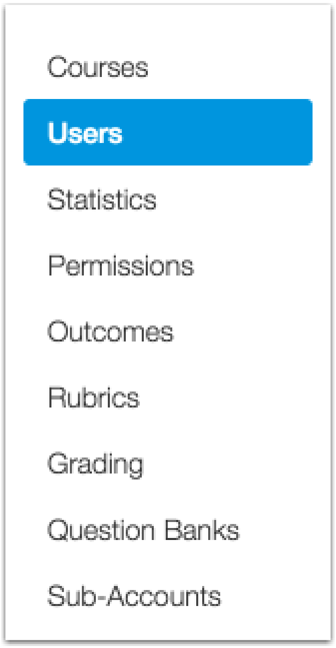


Locate Find A User on the sidebar. Type in the user's name [1] and click the **Go** button [2].

View Search Results

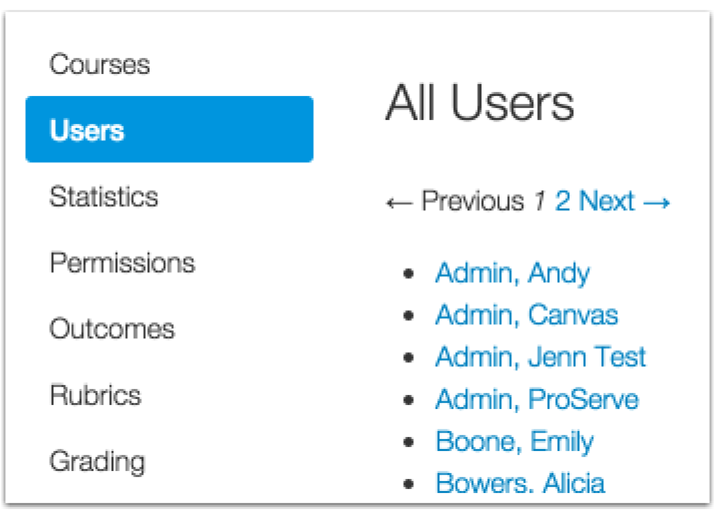
After clicking Go, you will see the search results. To access that user's details, click the name link.

Option 2: Open Users



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

View All Users



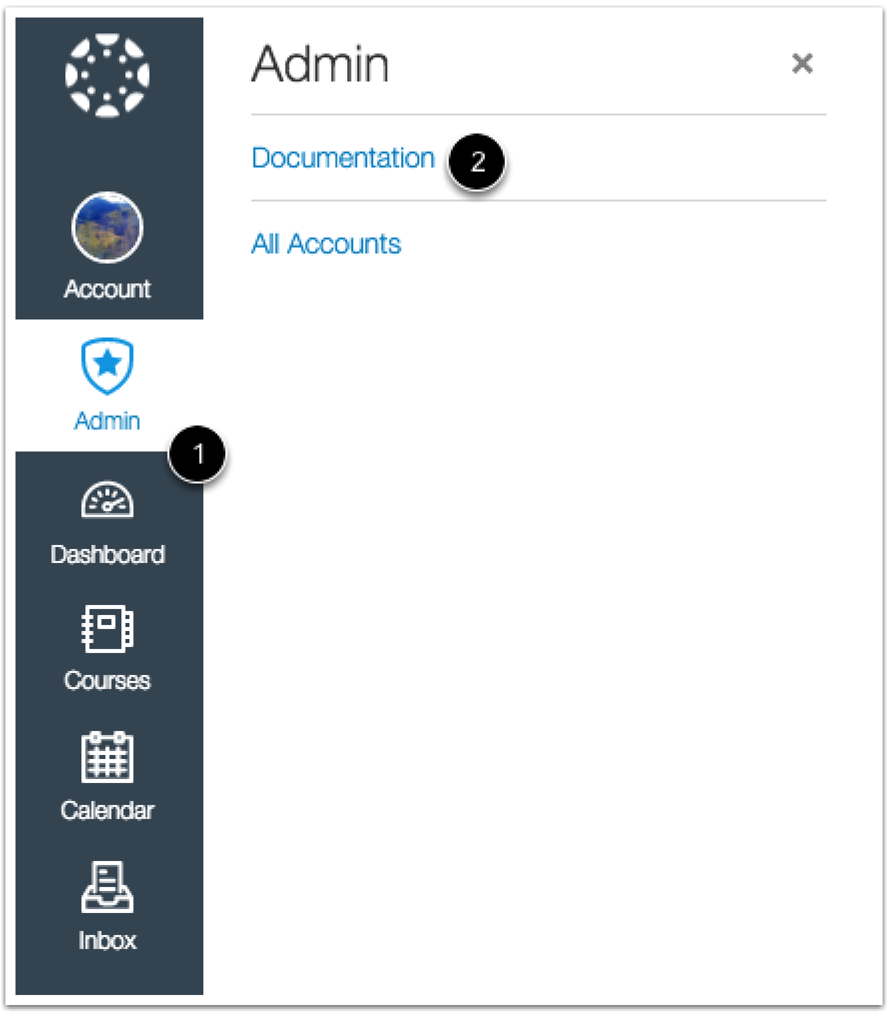
You can sift through all the users to find the one you are looking for by using the last name.

How do I message a user in an account?

You can message a user directly from your account.

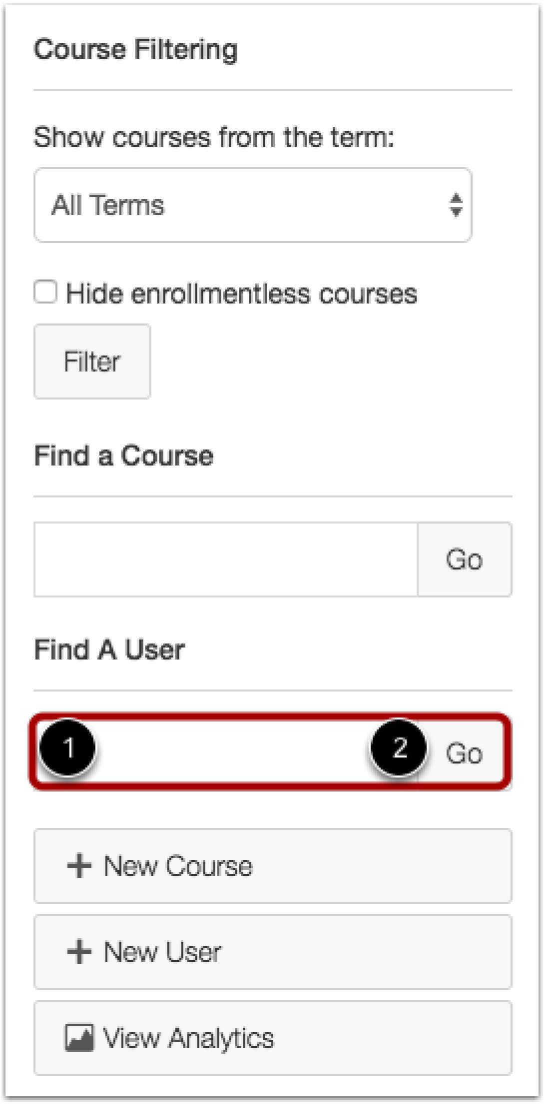
Note: You can also use your Inbox to send messages.

Open Account



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

Find a User

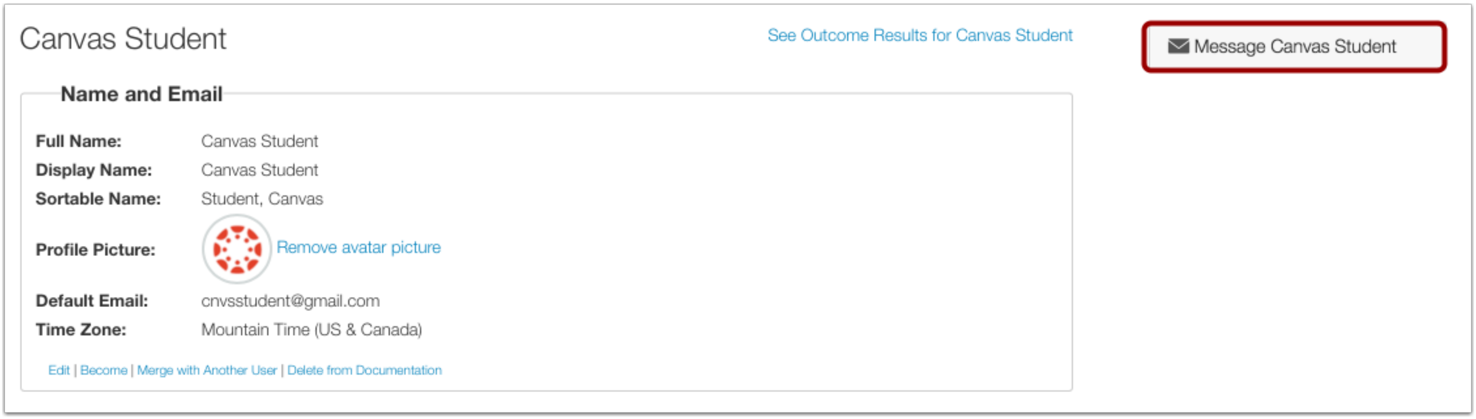


Locate Find A User on the sidebar. Type in the user's name [1] and click the **Go** button [2].

Open User Details

Click the user's name.

Message User

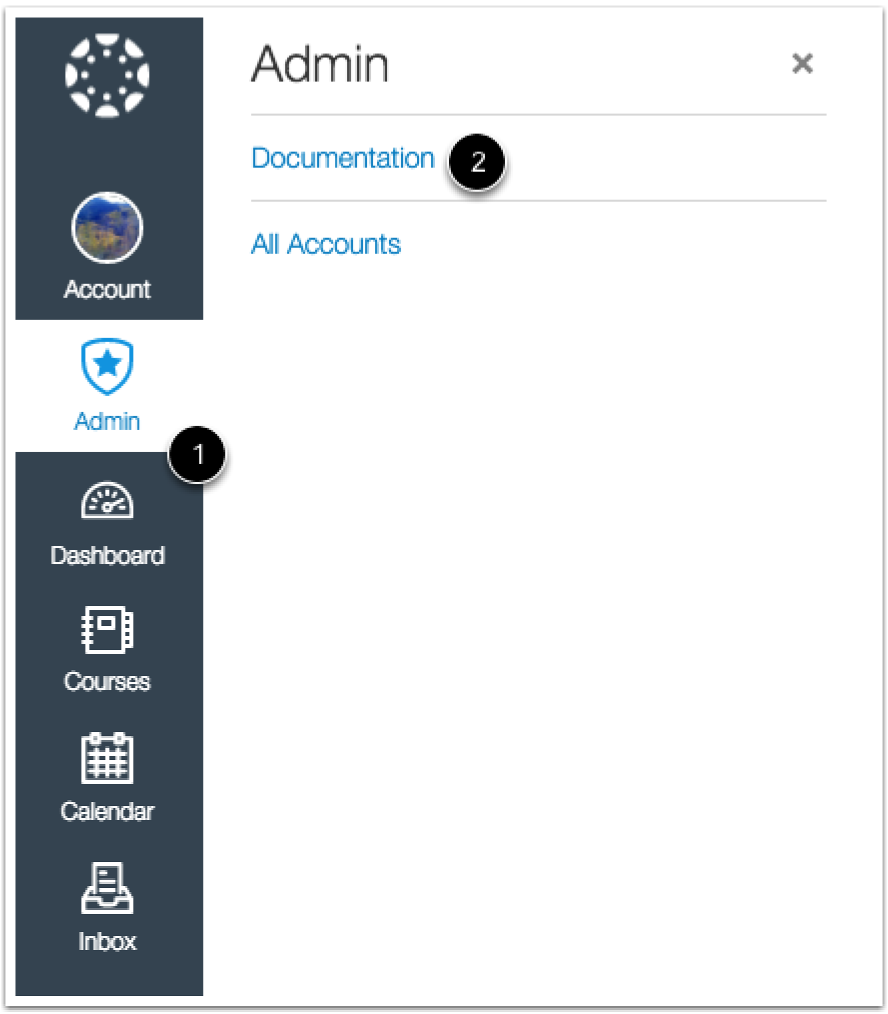


Find and click the **Message [User Name]** button. By clicking on the button, you will be taken to your Inbox to send a message to that user. If you need a reminder on how to send a message, you can visit the Conversations chapter in the Instructor Guide.

How do I edit a user's details in an account?

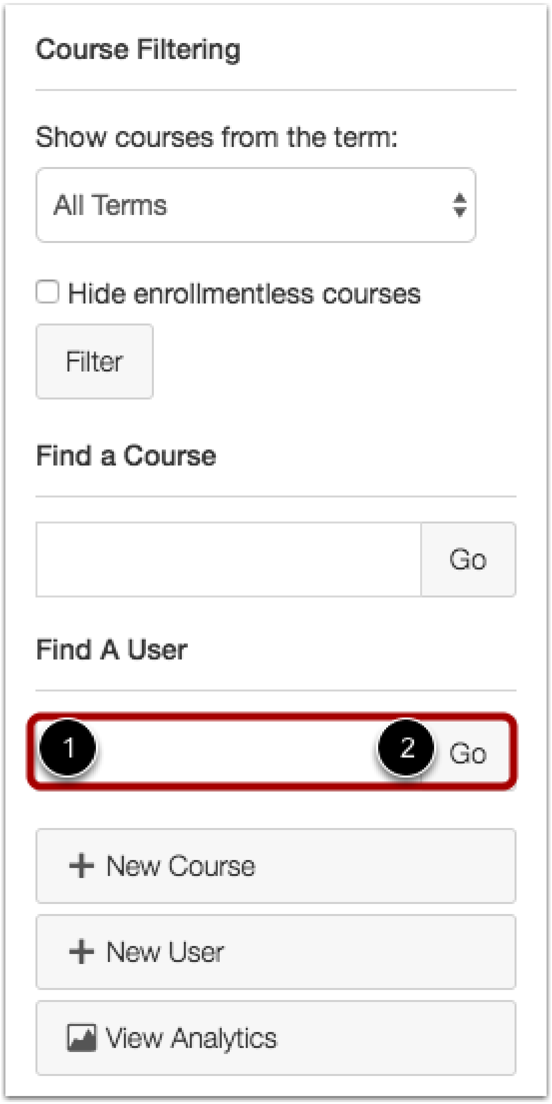
You can edit a user's details in your account.

Open Account



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

Find a User

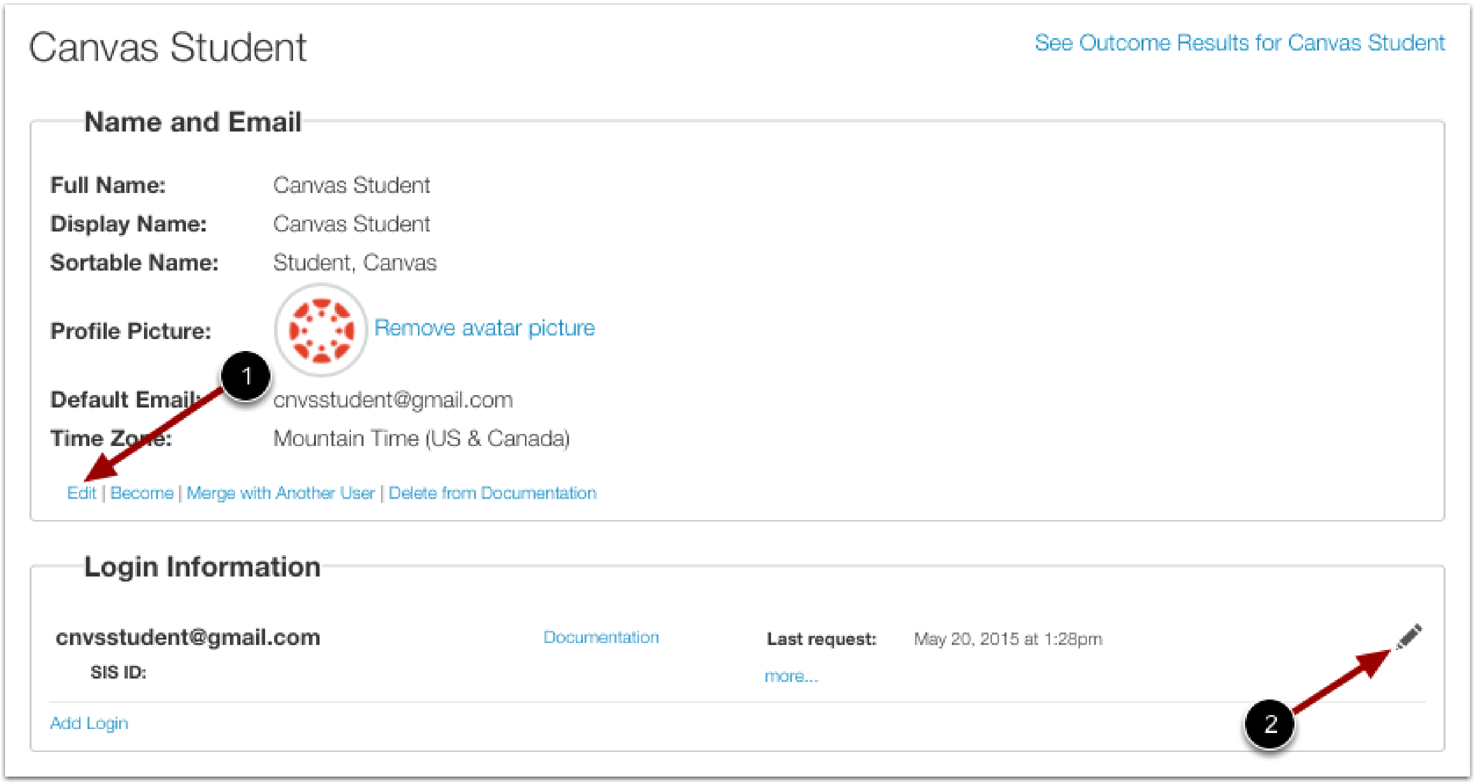


Locate Find A User on the sidebar. Type in the user's name [1] and click the **Go** button [2].

Open User Details

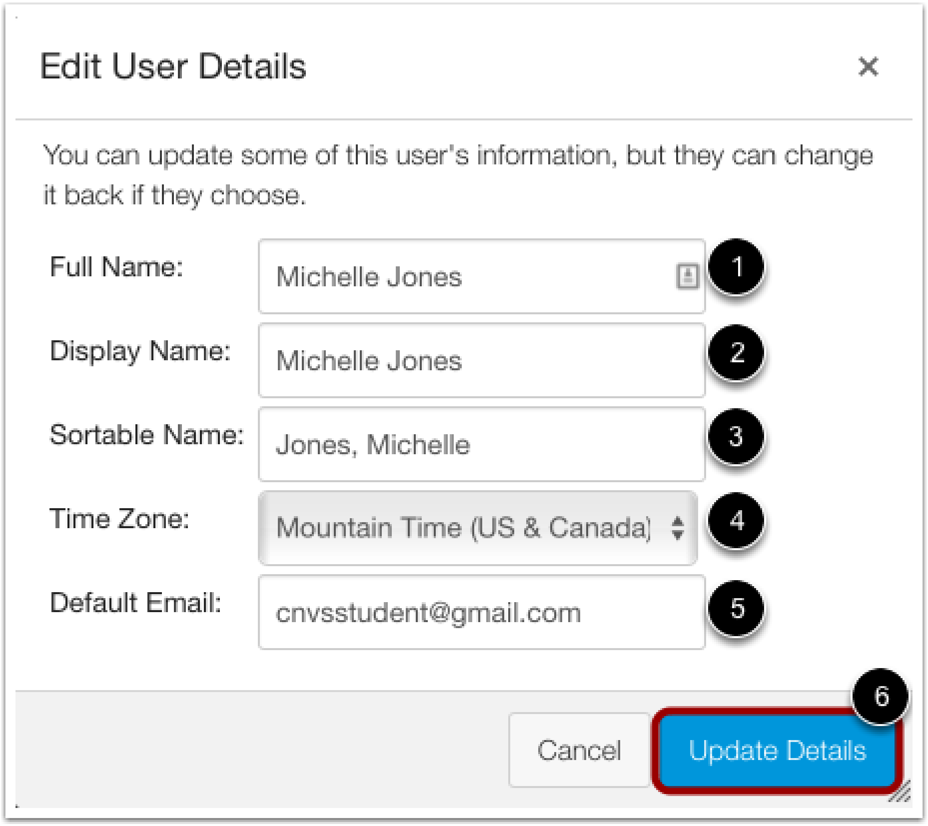
Click the user's name.

View User Details



To edit the user's details, click the **Edit** link [1]. To edit Login Information, click the **Edit** icon [2].

Edit User Details

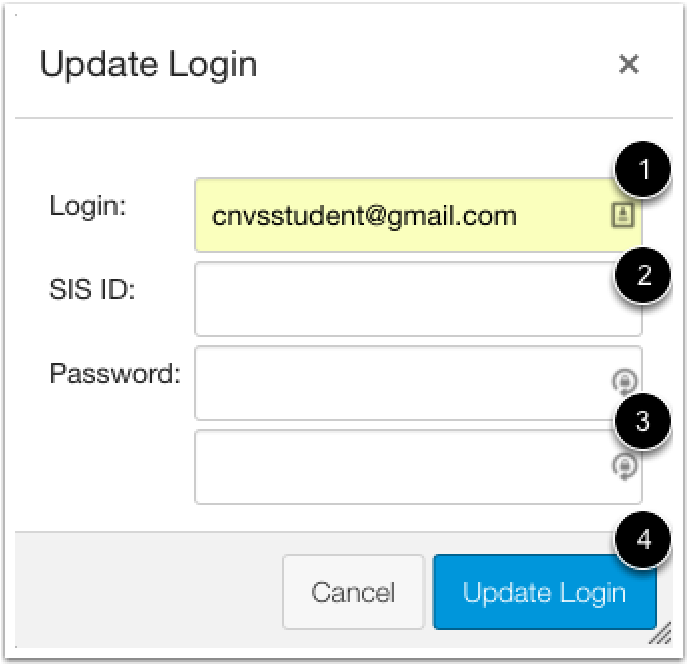


Here you can edit the user's details, but the user can change it back if they choose. The details you can edit here are:

1. **Full Name** is used for grading, SIS imports, and other administrative items [1].
2. **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.
3. **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.
4. **Time Zone** can be set to where the user or institution is located [4].
5. **Default Email** is the user's contact method [5].

When you are done, click the **Update Details** button [6].

Edit User Login Information



You can edit a user's login information if you have the correct permissions. Your Customer Success Manger or Implementation Consultant needs to select the Password setting by admins checkbox to allow admins to see the password fields. This allows you to manually change the following using the interface:

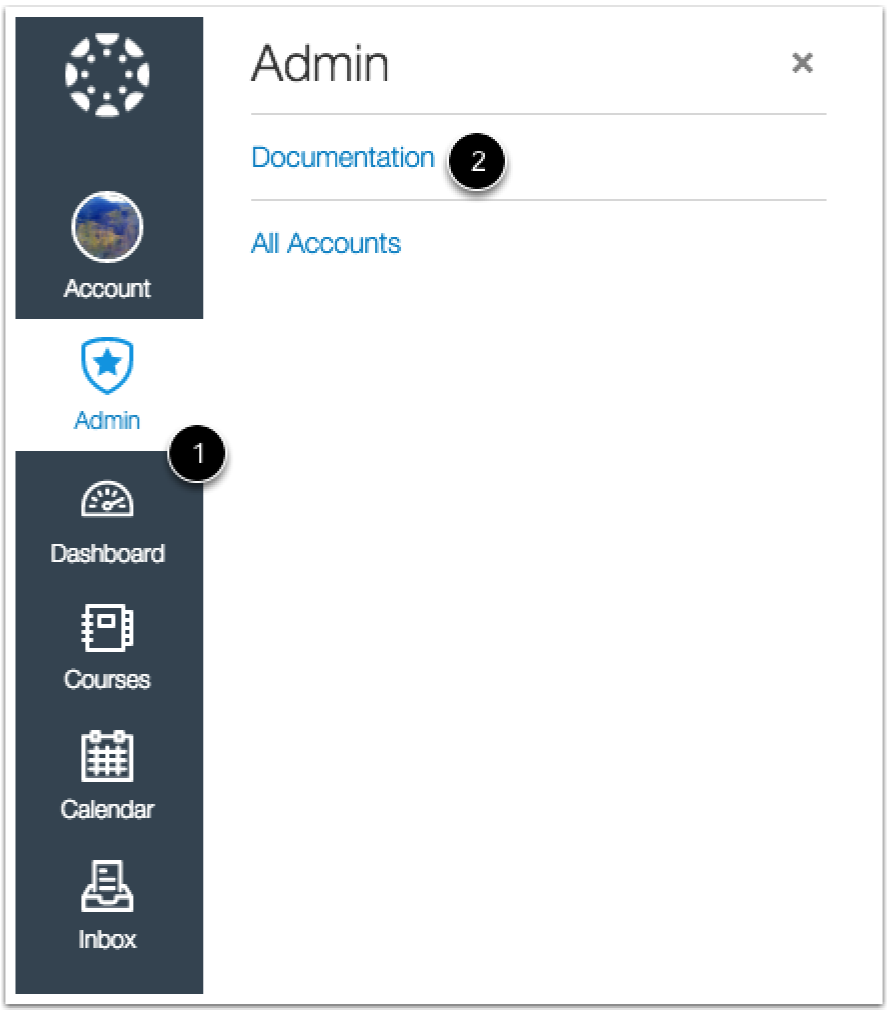
1. **Login ID.** Login_id [1] can contain letters, numbers, or the following symbol characters: - _ = +.
2. **SIS ID.** [2]
3. **Password.** Be sure to enter the password [3] in both password fields, otherwise the password will not change.

When you are done, click the **Update Login** button [4].

How do I edit a user's sortable name in an account?

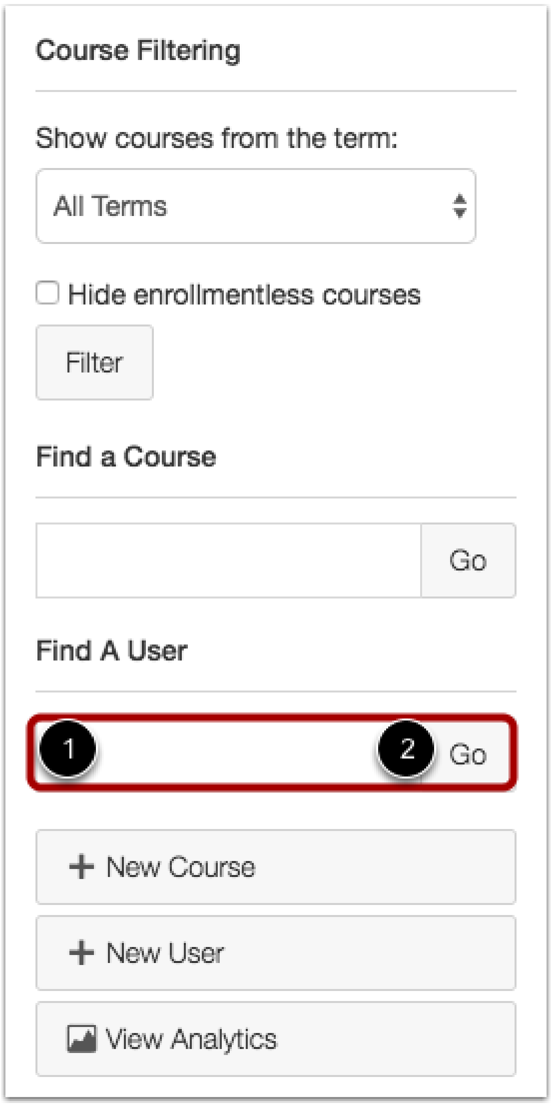
Canvas automatically creates a sortable user name using the Last Name, First Name convention. Admins can edit and change a user's sortable name, if needed.

Open Account



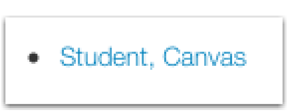
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Find a User



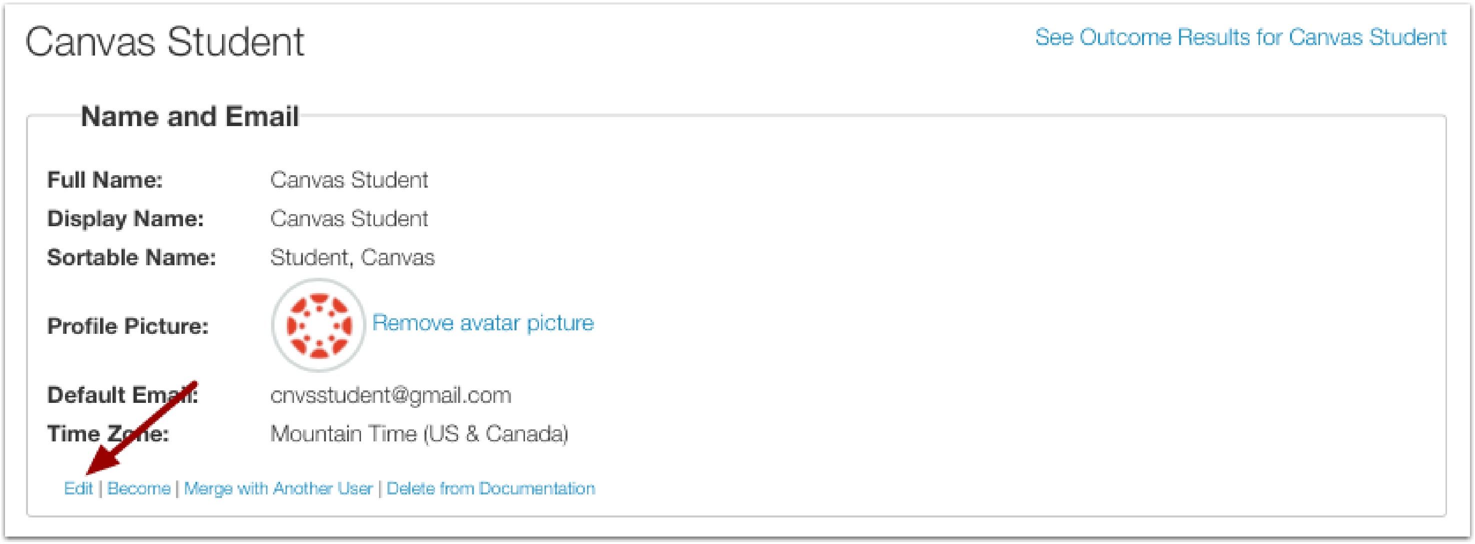
Locate Find A User on the sidebar. Type in the user's name [1] and click the **Go** button [2].

Open User Details



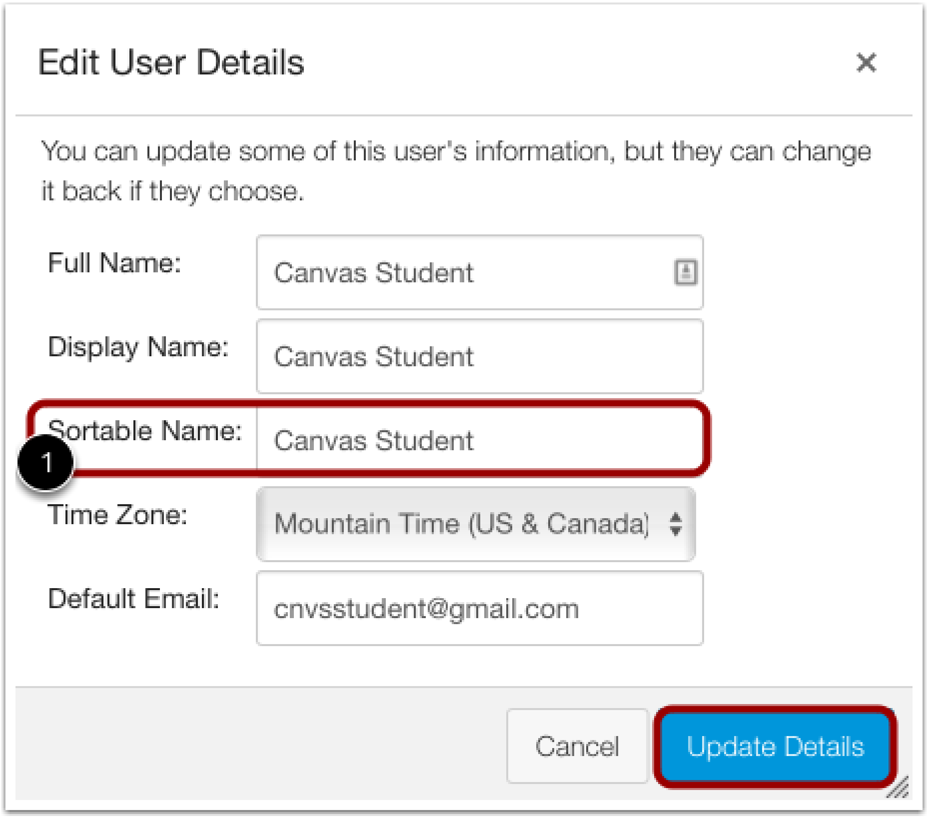
Click the user's name.

Edit Details



To edit the user's details, click the **Edit** link.

Update Sortable Name

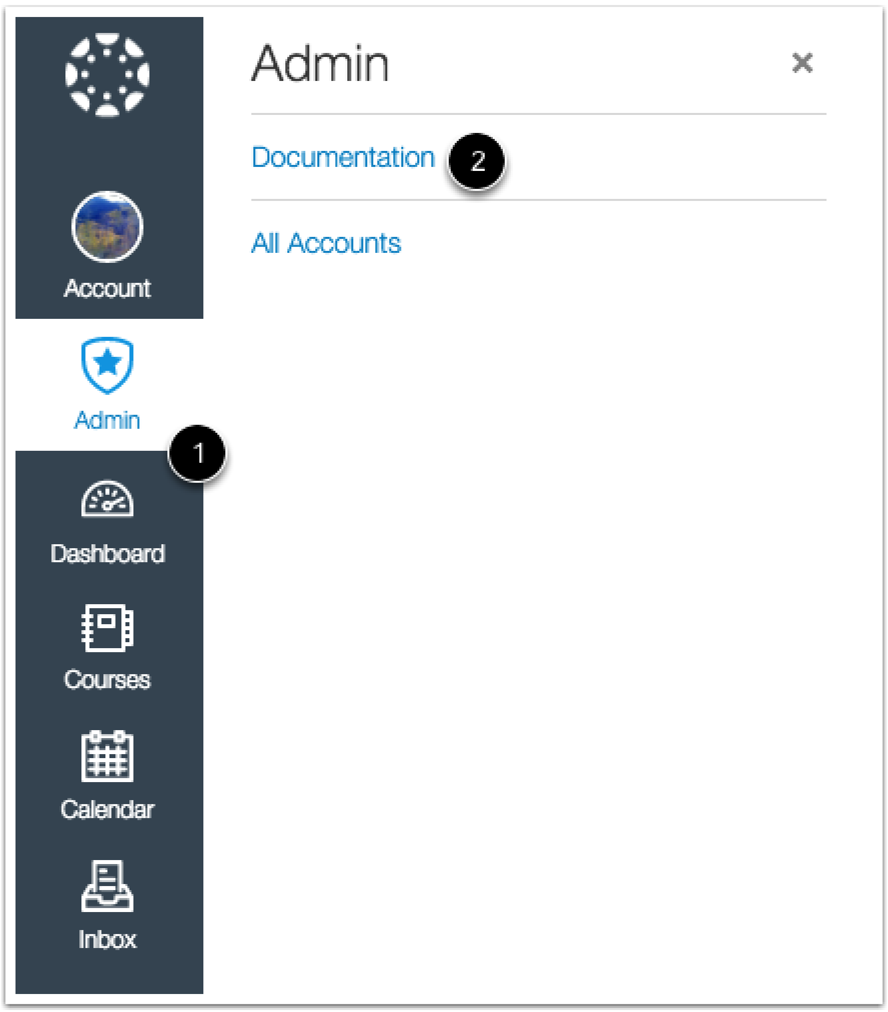


Type the name as you wish it to appear in the Sortable Name field. Click the **Update Details** button when you are finished.

How do I view the enrollments for a user in an account?

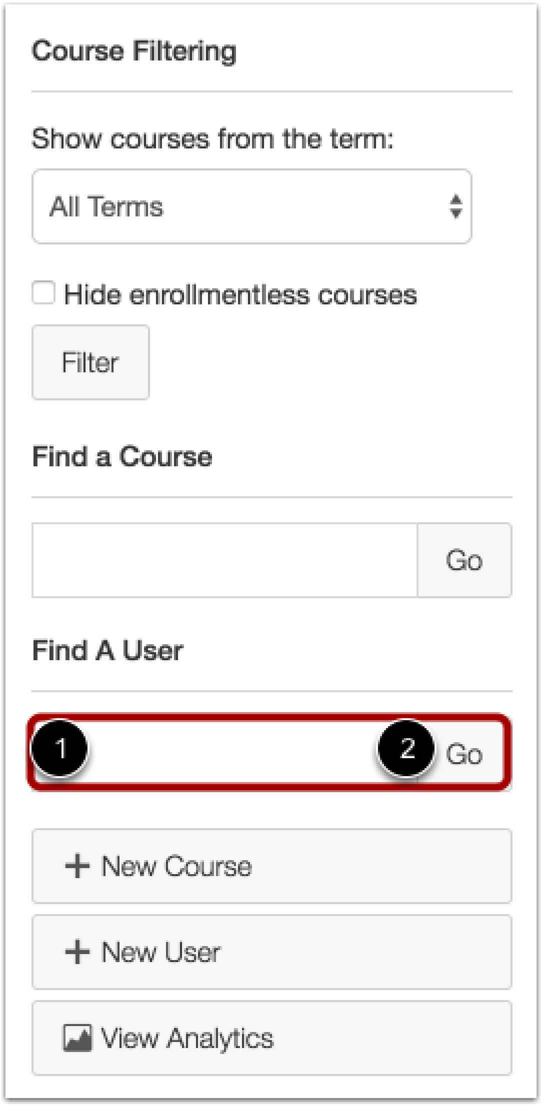
As an admin, you can view all course enrollments for a user in your account. You can also delete a course enrollment.

Open Account



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

Find a User

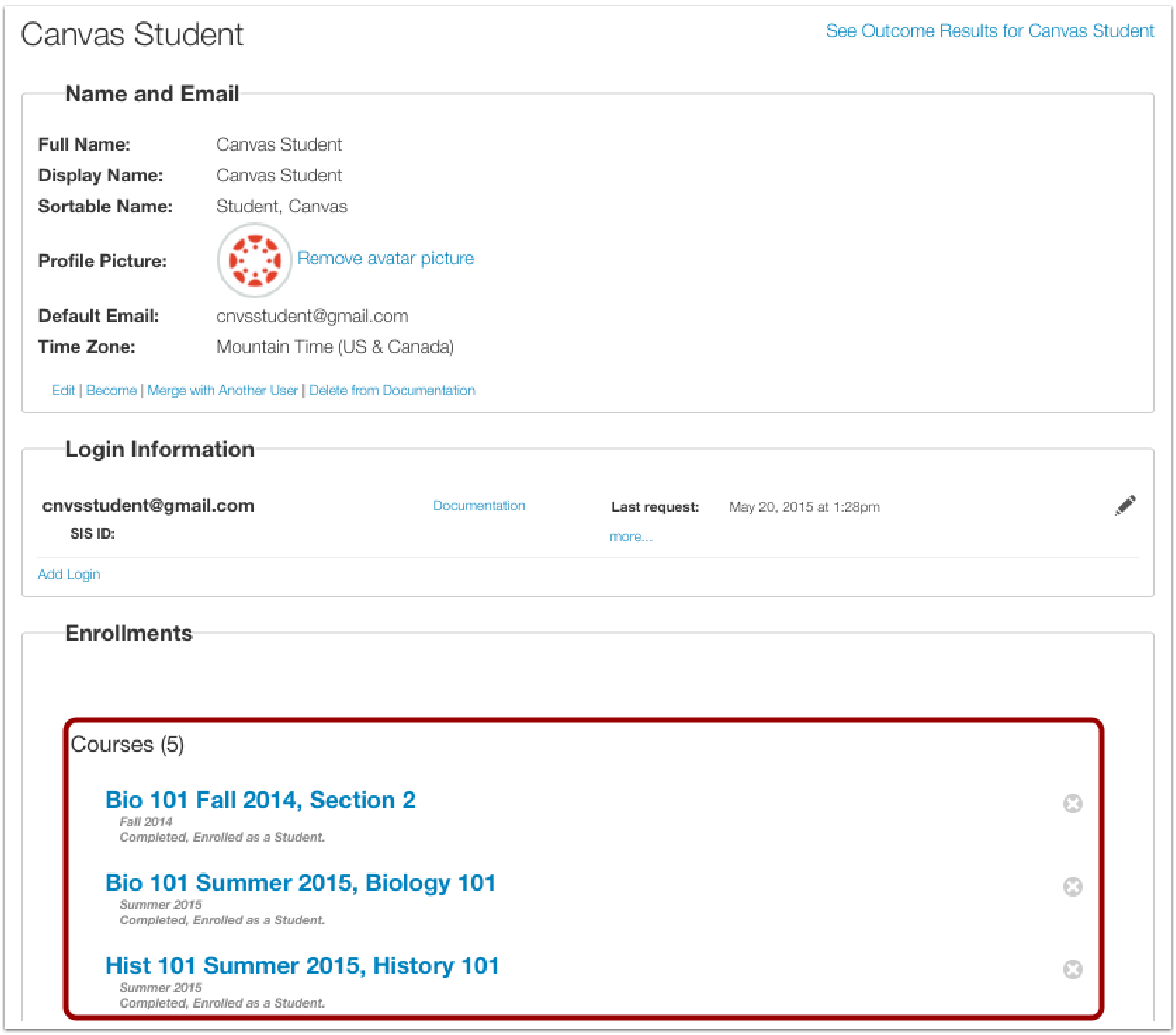


Locate **Find A User** on the sidebar. Type in the user's name [1] and click the **Go** button [2].

Open User Details

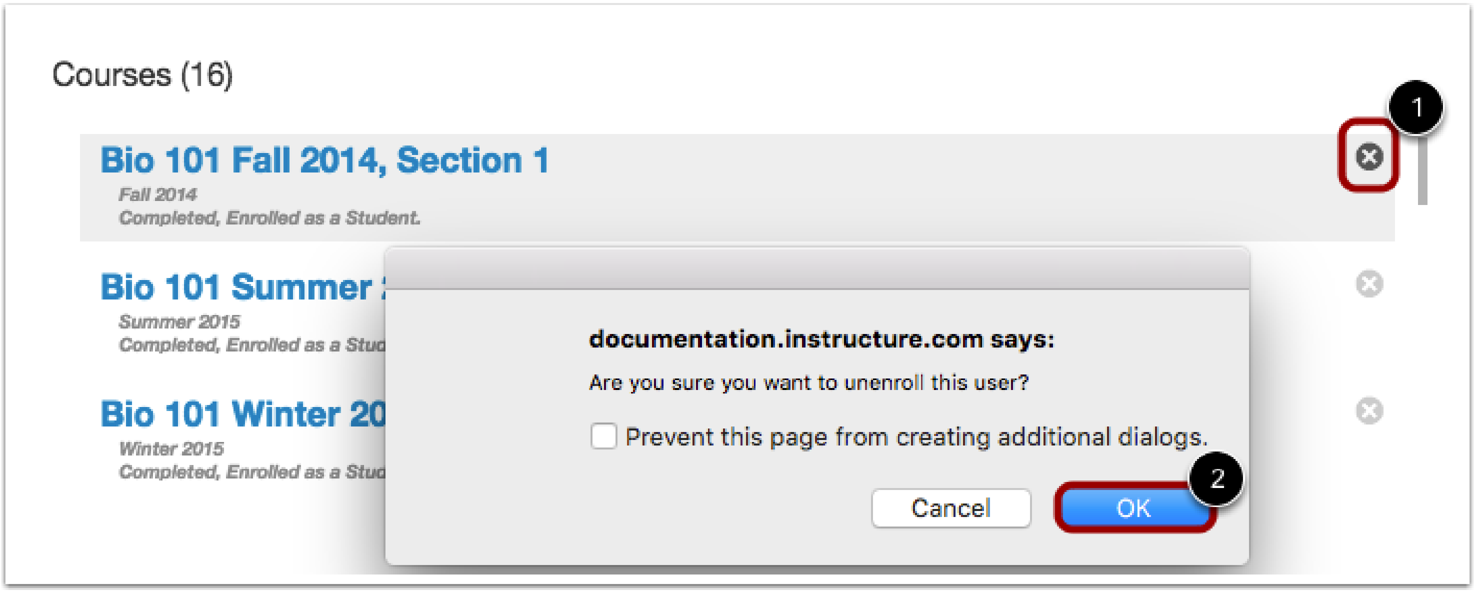
Click the user's name.

View Enrollments



If you scroll down the page, you will see the **Enrollments** section. Here you can see the user's enrollments, if they are active or not, and what role they are.

Unenroll User



To unenroll a user from a course, click the **Delete** icon [1] then click the **OK** button.

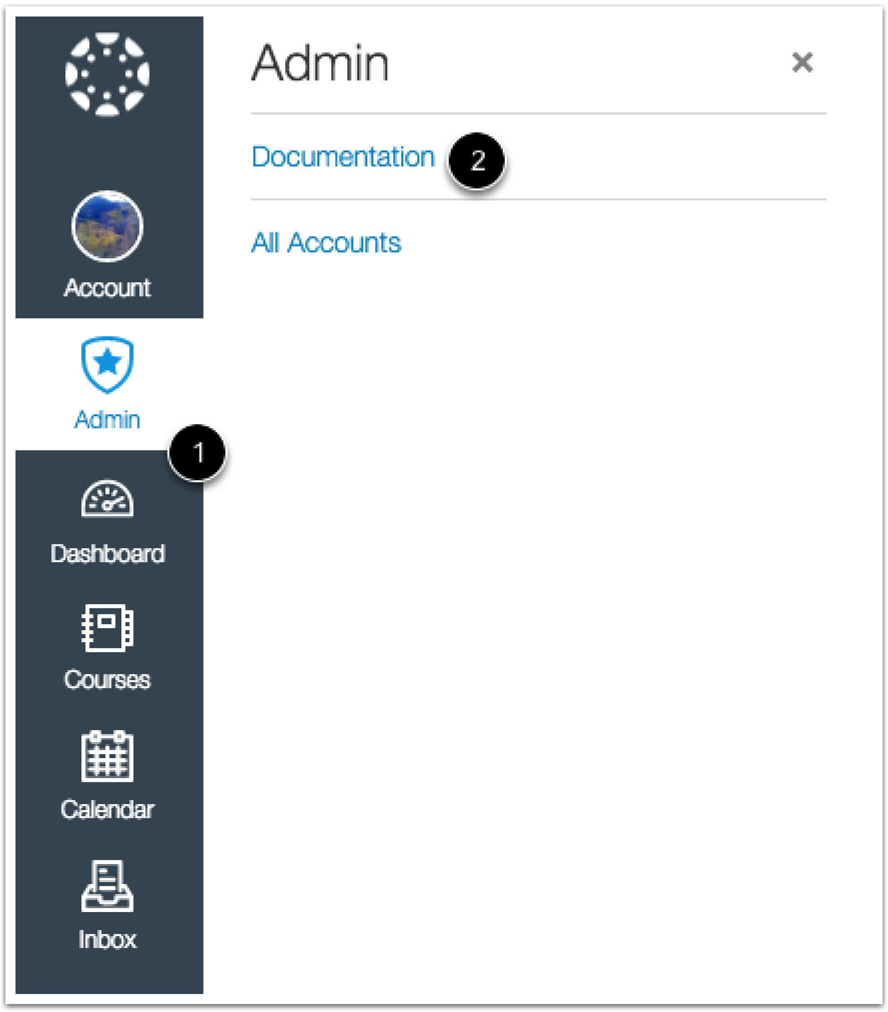
This action creates the same result as deleting an enrollment at the course level.

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.

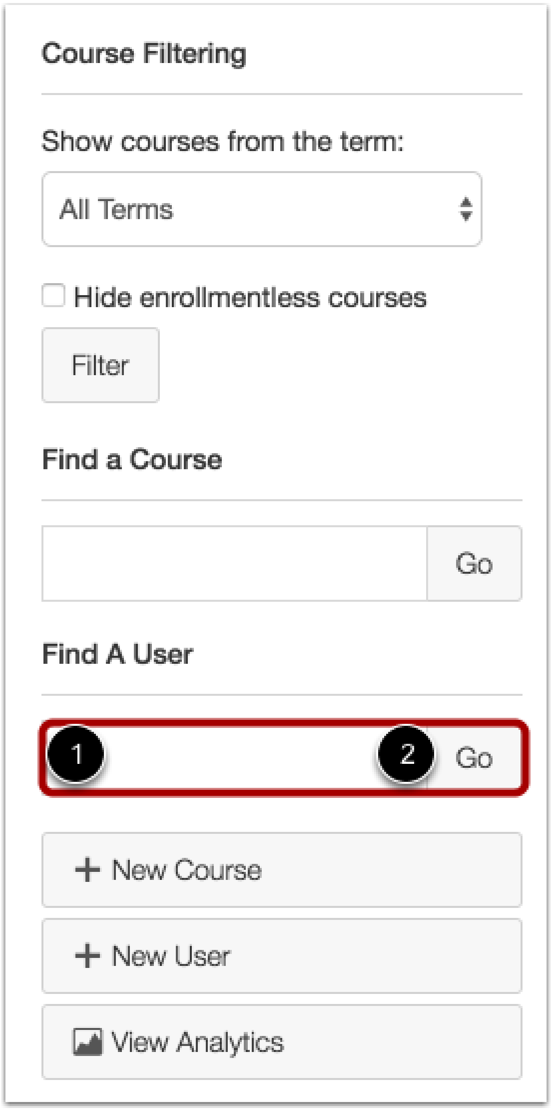
Note: Viewing page views is an account permission. If you cannot view page views, your institution has restricted this feature.

Open Account



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

Find a User

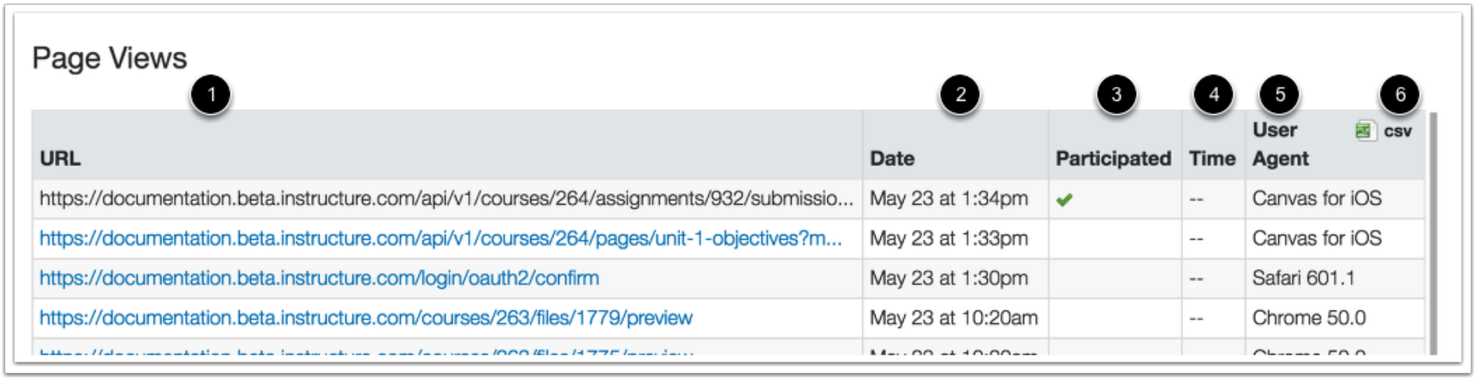


Locate Find A User on the sidebar. Type in the user's name [1] and click the **Go** button [2].

Open User Details

Click the user's name.

Locate Page Views



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, such as when a user accesses and participates in a course using the Canvas by Instructure 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 CSV file displays up to 300 lines of data.

For further details about student interaction you can view student course analytics.

Note: Page views older than one year will not be shown.

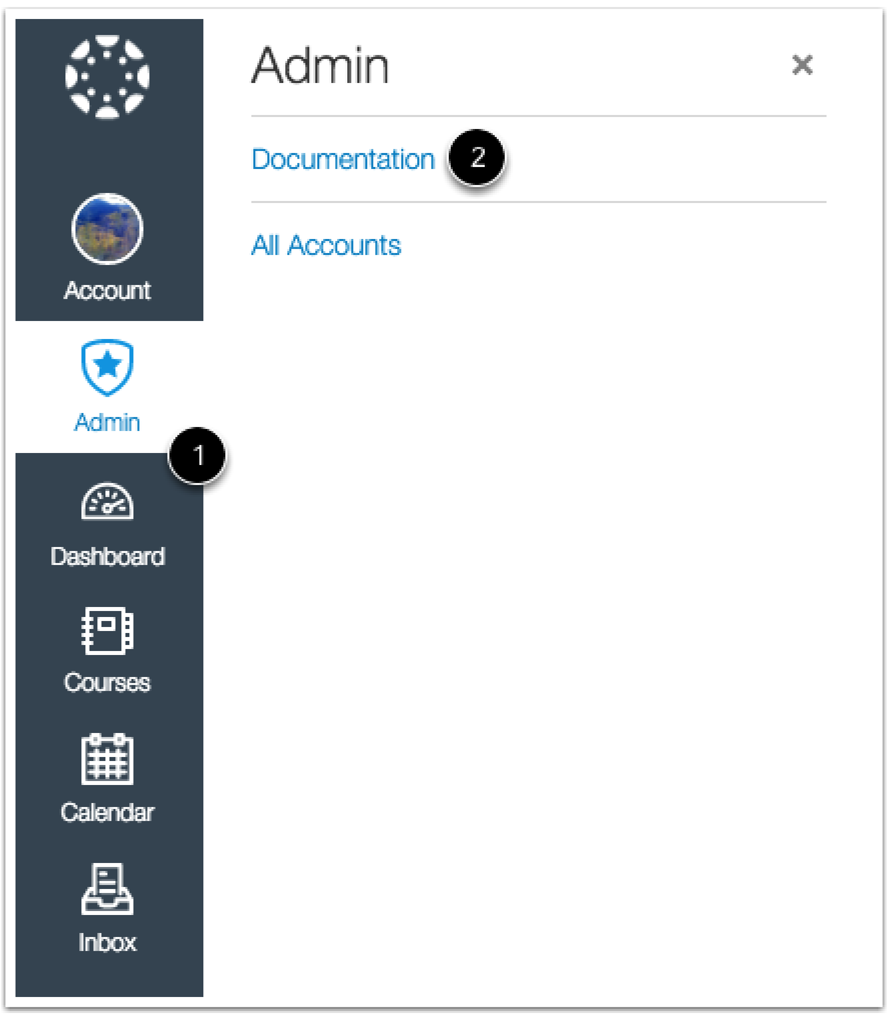
How do I manage profile pictures for users in an account?

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 a user has a Gravatar and chooses not to upload a profile picture, the Gravatar will show up.

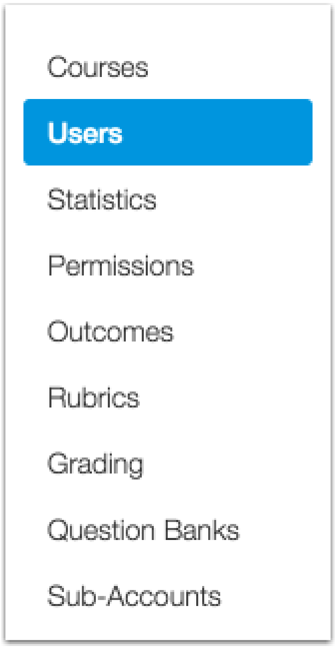
If a user reports a profile picture as inappropriate, you can review those profile pictures and approve, lock, or delete the picture.

Open Account



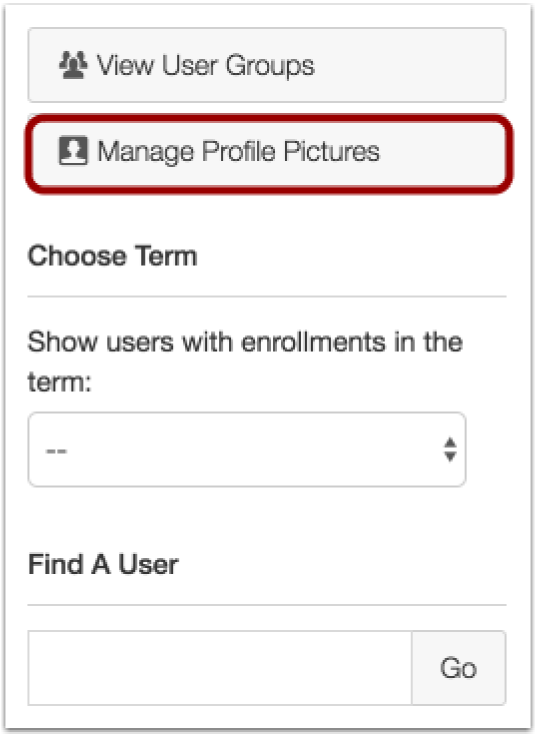
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Users



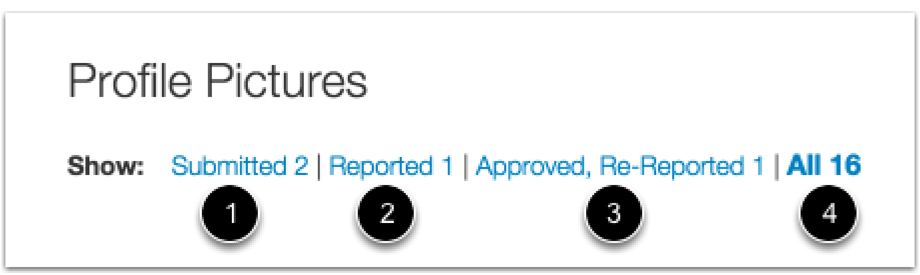
In Account Settings, click the **Users** link.

Manage Profile Pictures



Click the **Manage Profile Pictures** button.

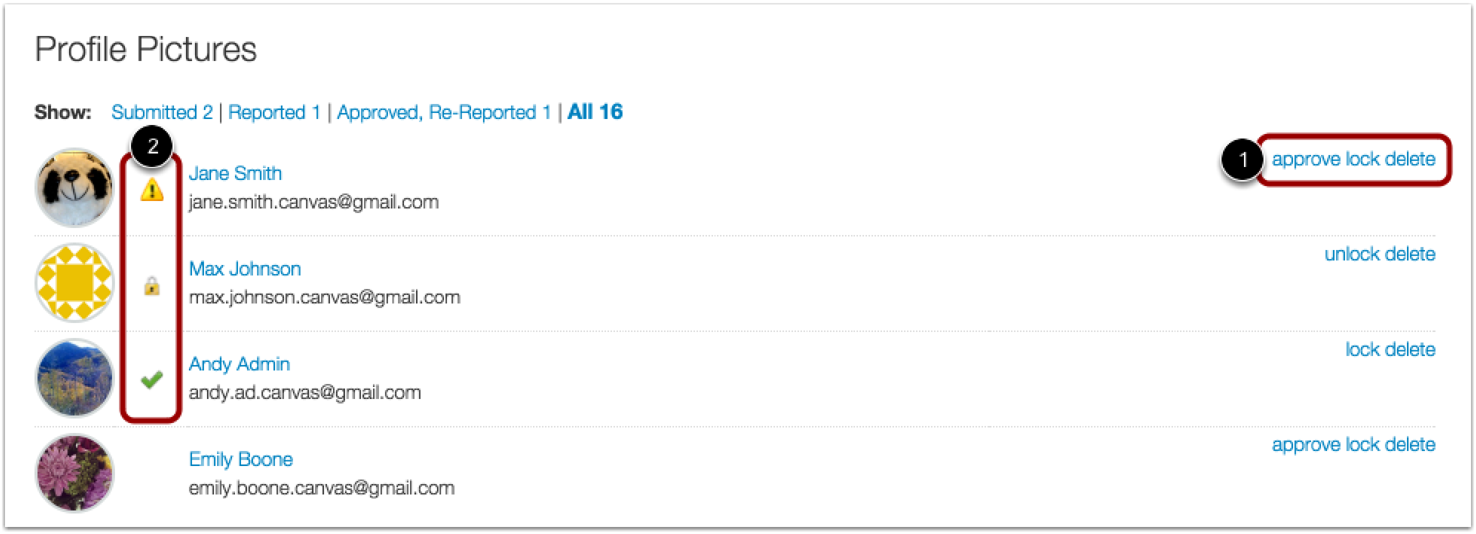
View Profile Pictures



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



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 green check mark
- locked profile pictures display a lock icon
- reported profile pictures display a warning icon

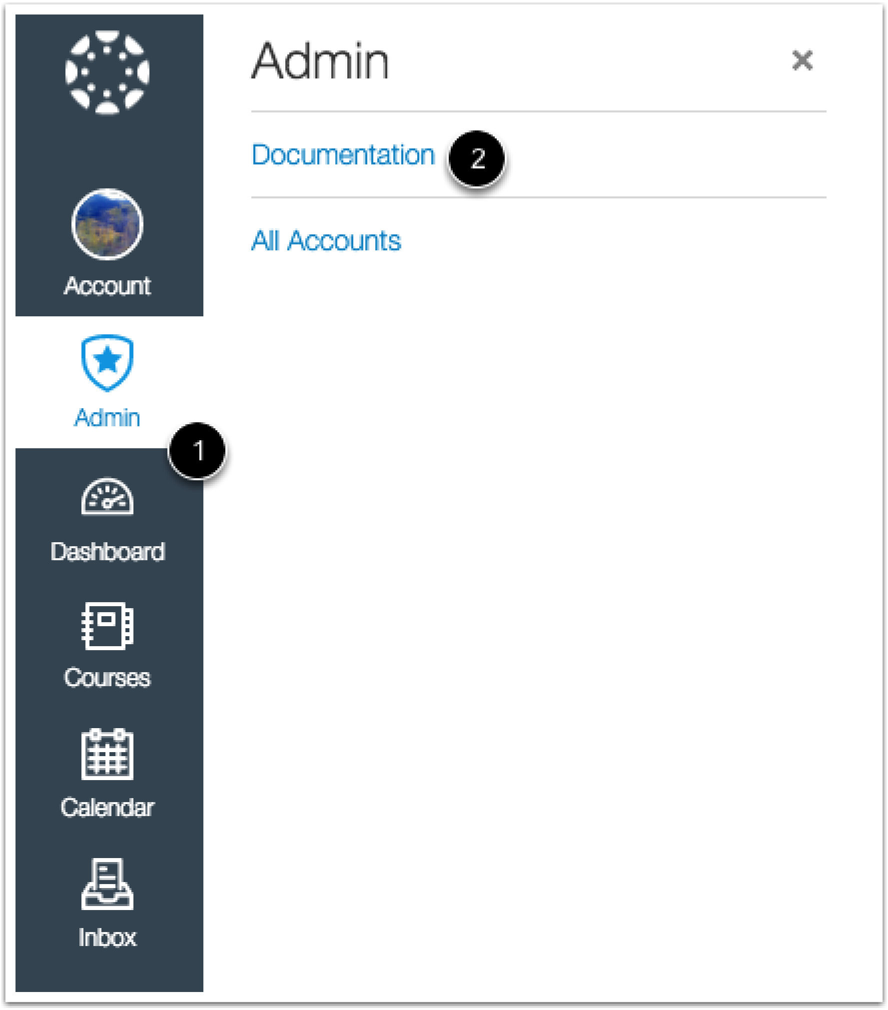
How do I manually add a new user to an account?

You can add new users to your account. Users are generally added to an account through your institution's student information system (SIS), but users can also be added manually. Users can only be added at the account level.

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:

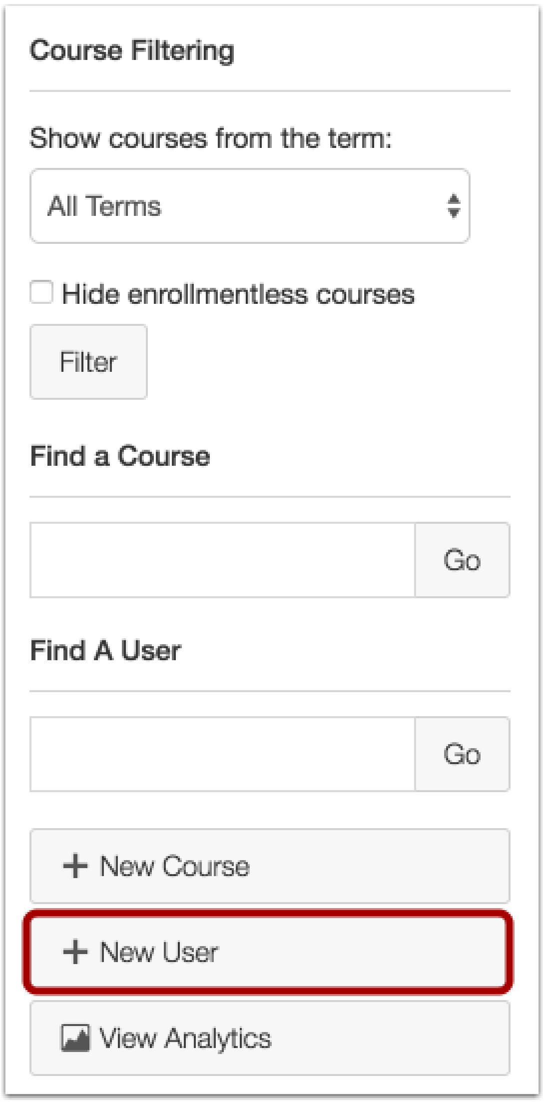
- If the user does not have a username in the course's root account, the user's email address is linked to another user within the account, or the institution does not use delegated authentication if open registration is enabled, an account will be created for the user. Adding an email address that is 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 a course 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



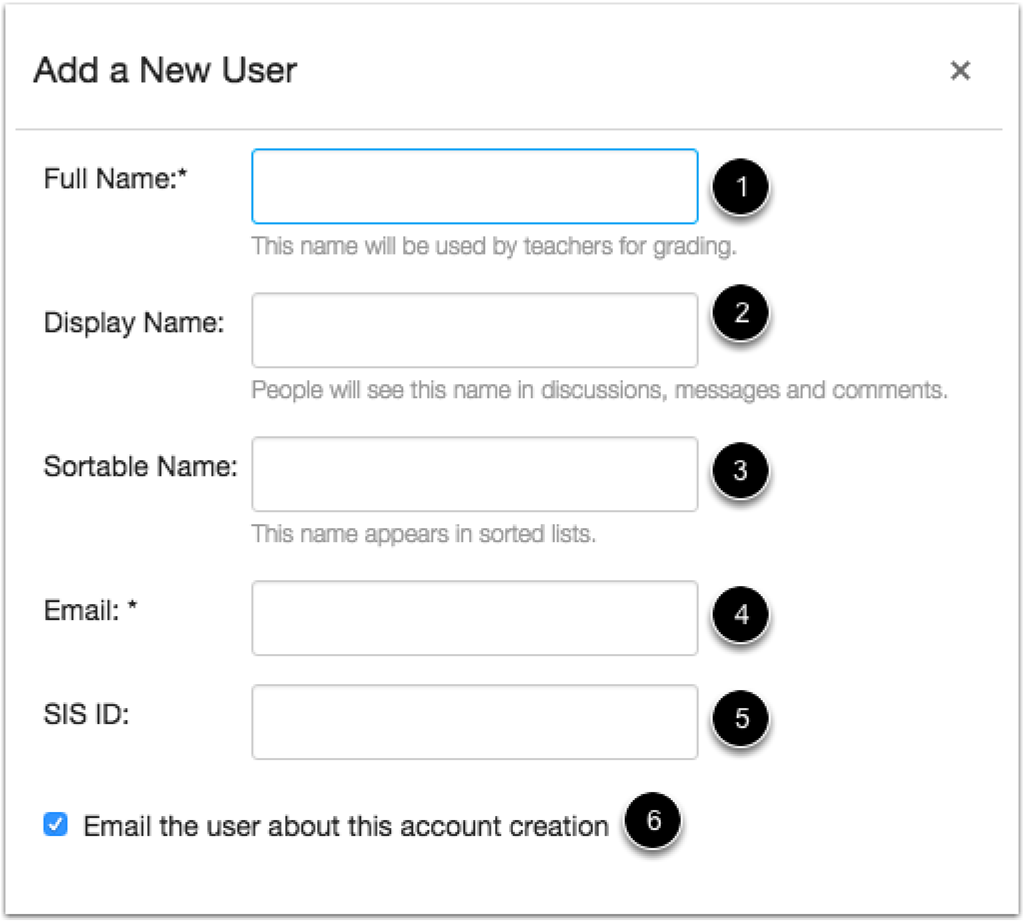
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Add a New User



Click the **Add New User** button.

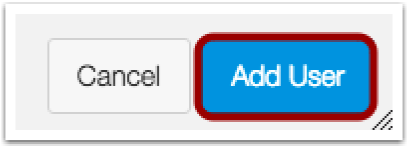
Add User Details



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 and can be edited. 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. If you do not select this checkbox, the user will not receive an email.

Add User



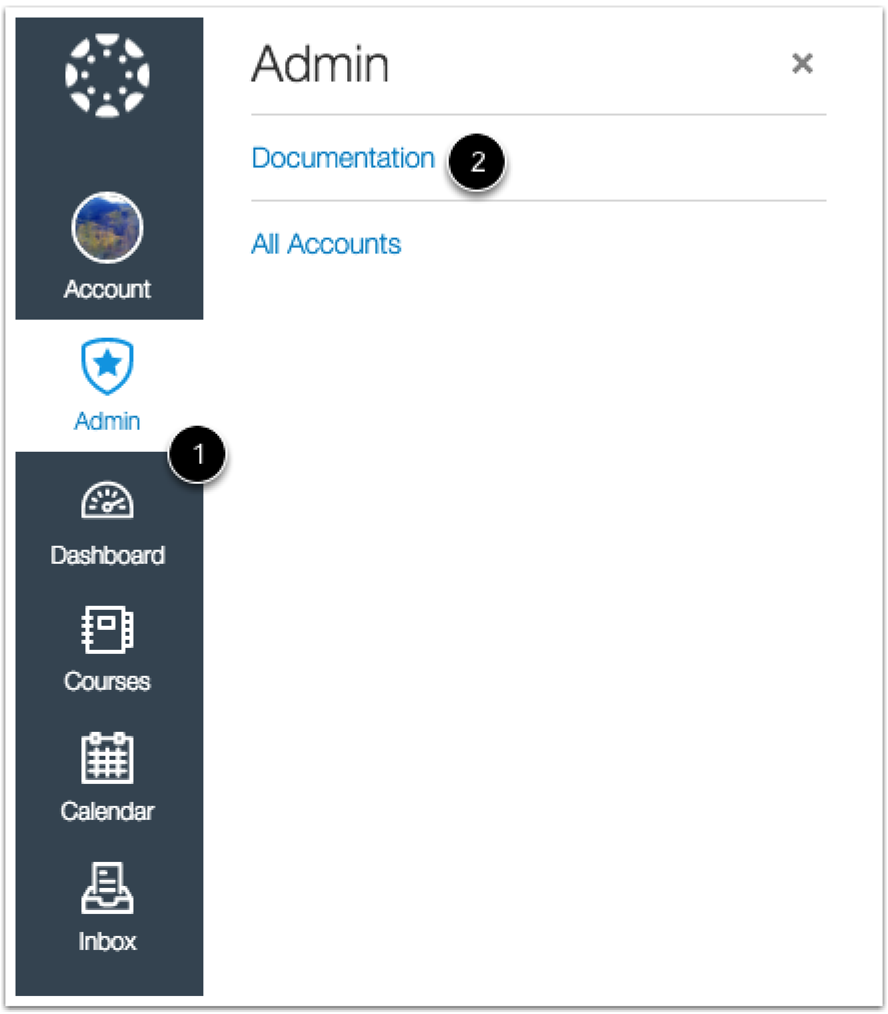
Click the **Add User** button.

How do I delete a user from an account?

You can delete a user from your account.

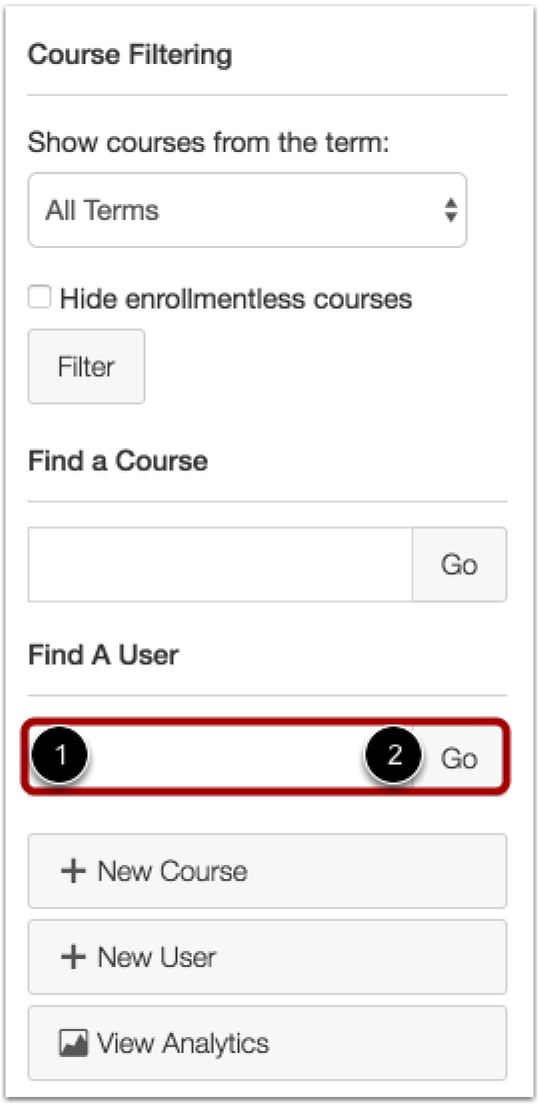
Note: This will remove the user's data (including grades) from all courses and groups. This process cannot be undone.

Open Account



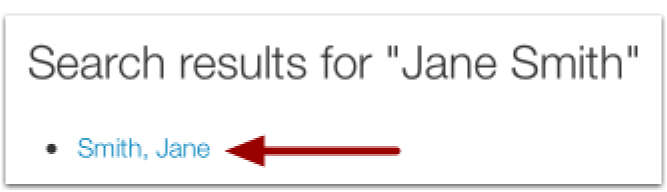
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Find a User



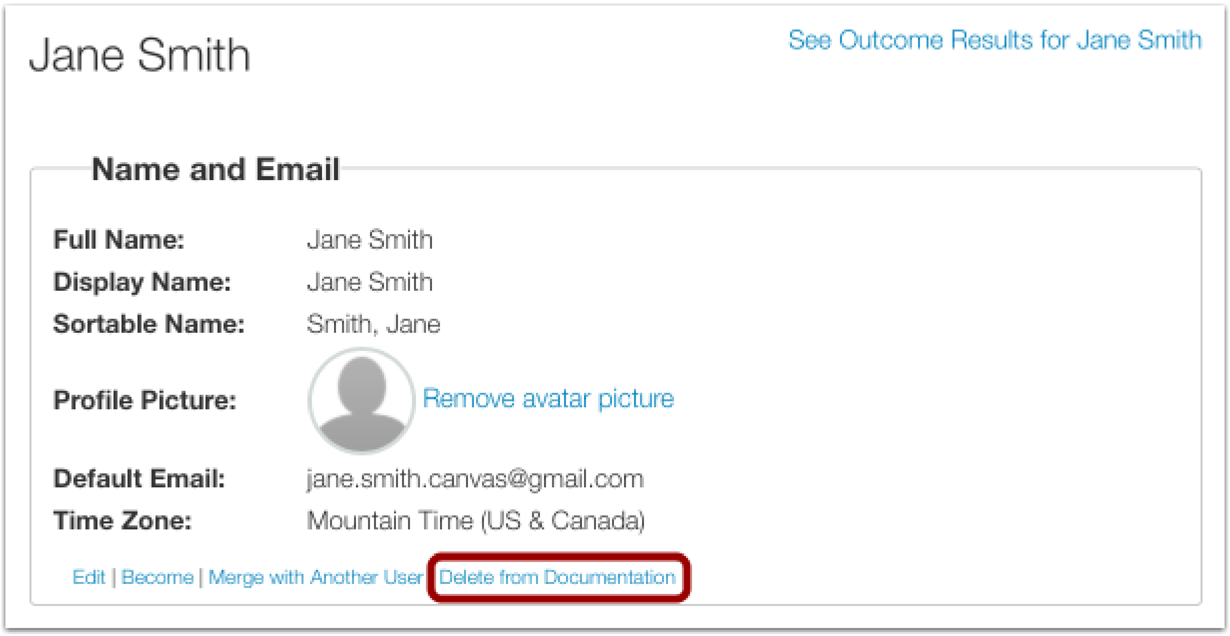
Locate Find A User on the sidebar. Type in the user's name [1] and click the **Go** button [2].

Open User Details



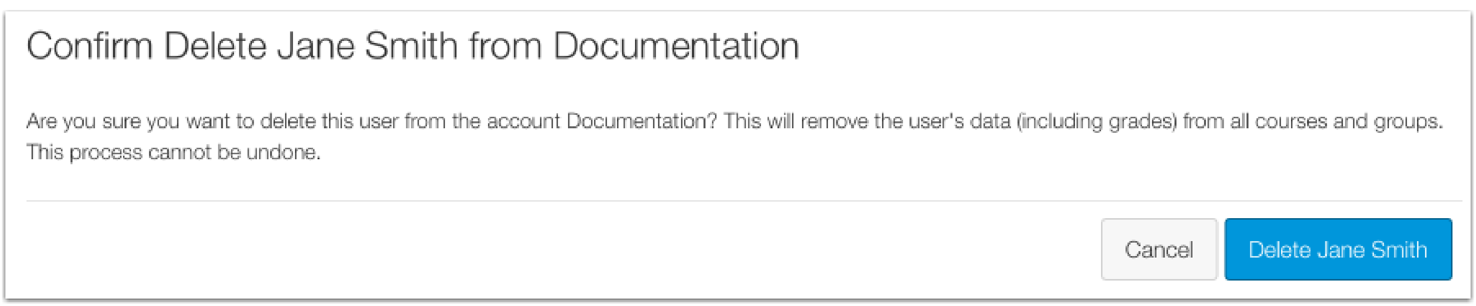
Click the user's name.

View User Details



Locate the **Delete from [account title]** link to delete the user.

Confirm Deletion



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.

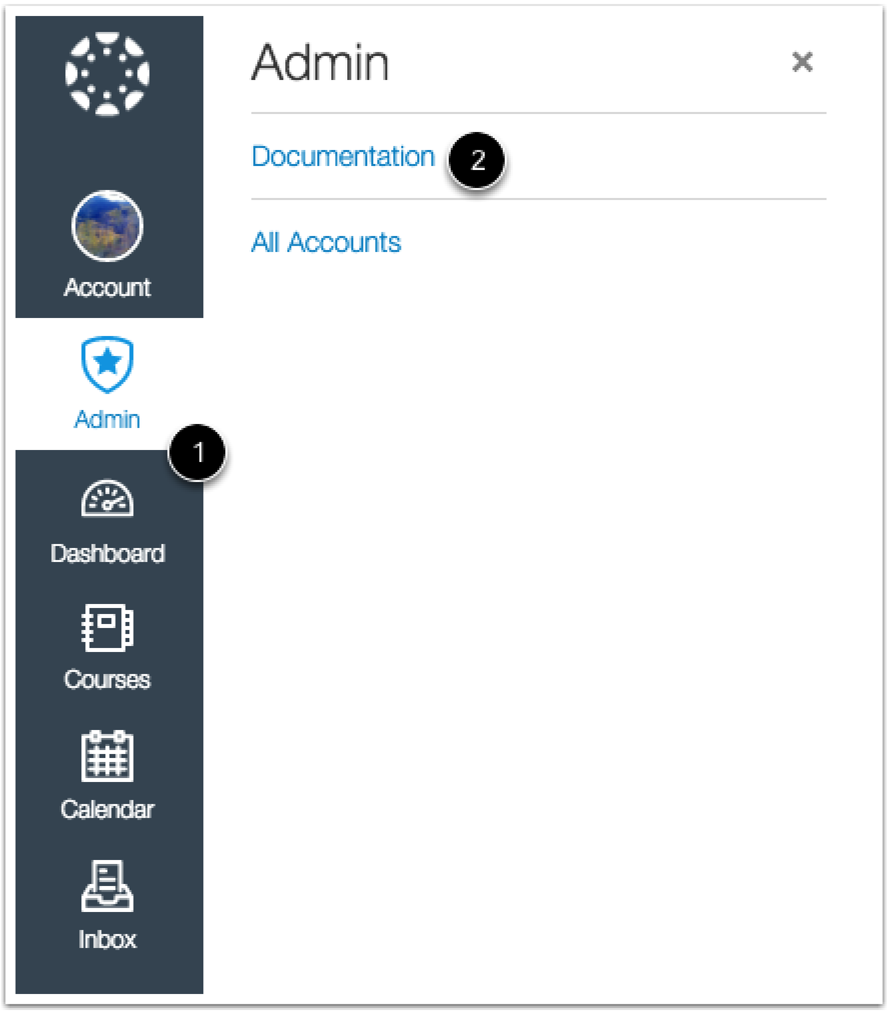
Note: This will remove the user's data (including grades) from all courses and groups. This process cannot be undone.

How do I merge users in an account?

You can merge users within your account.

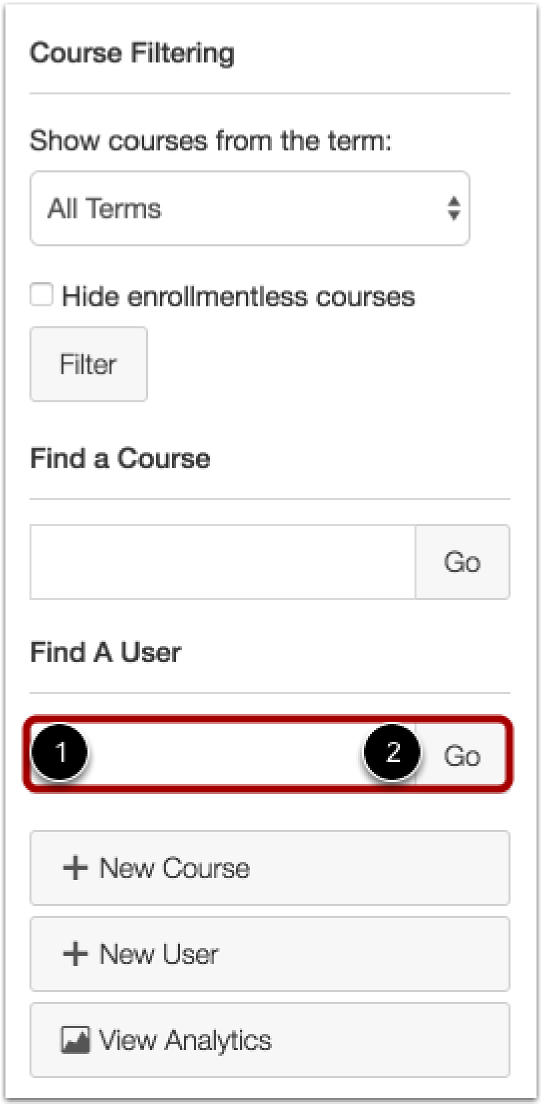
Note: This process cannot be undone, so please make sure you're certain before you continue.

Open Account



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

Find a User

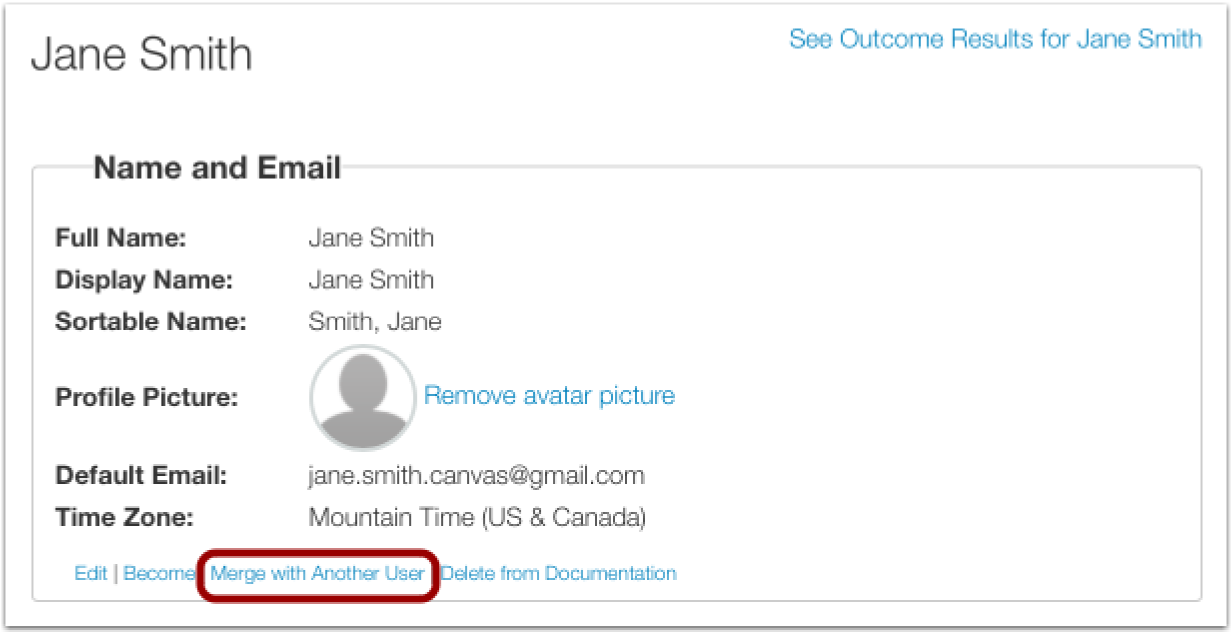


Locate Find A User on the sidebar. Type in the user's name [1] and click the **Go** button [2].

Open User Details

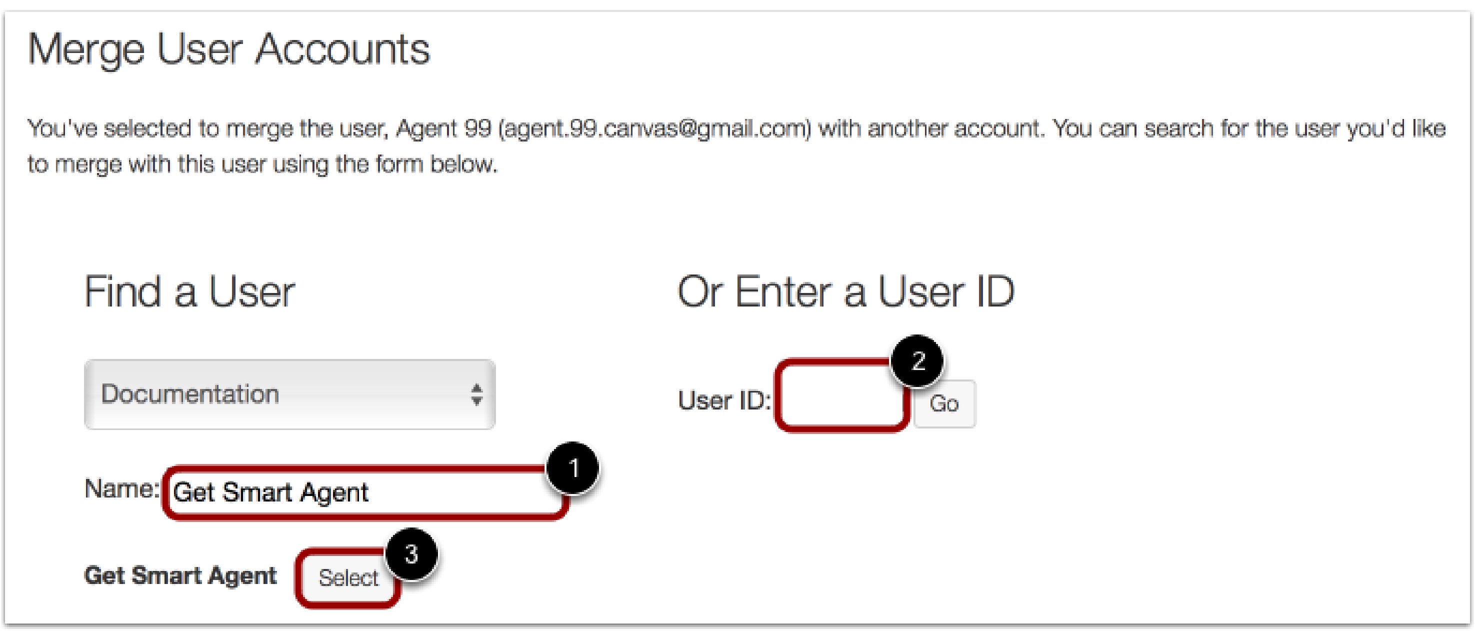
Click the user's name.

View User Details



Click the **Merge with Another User** link to merge two users together.

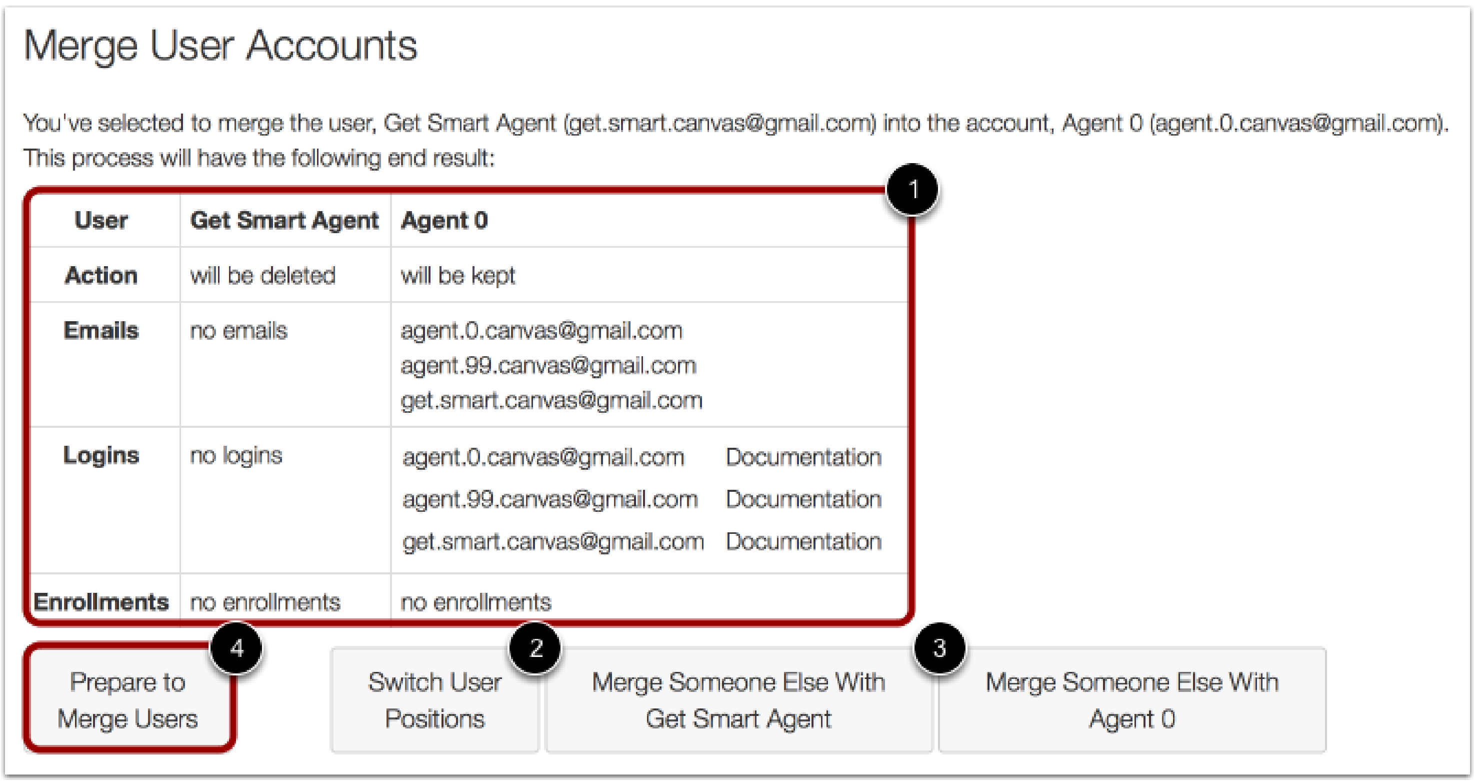
Find User Account



In order to merge users, you either need to **Find a User** [1] or **Enter a User ID** [2]. After finding the user, click the **Select** button [3] to merge the user accounts.

Note: The User ID is found at the end of your Canvas URL (i.e. users/XXXXXX).

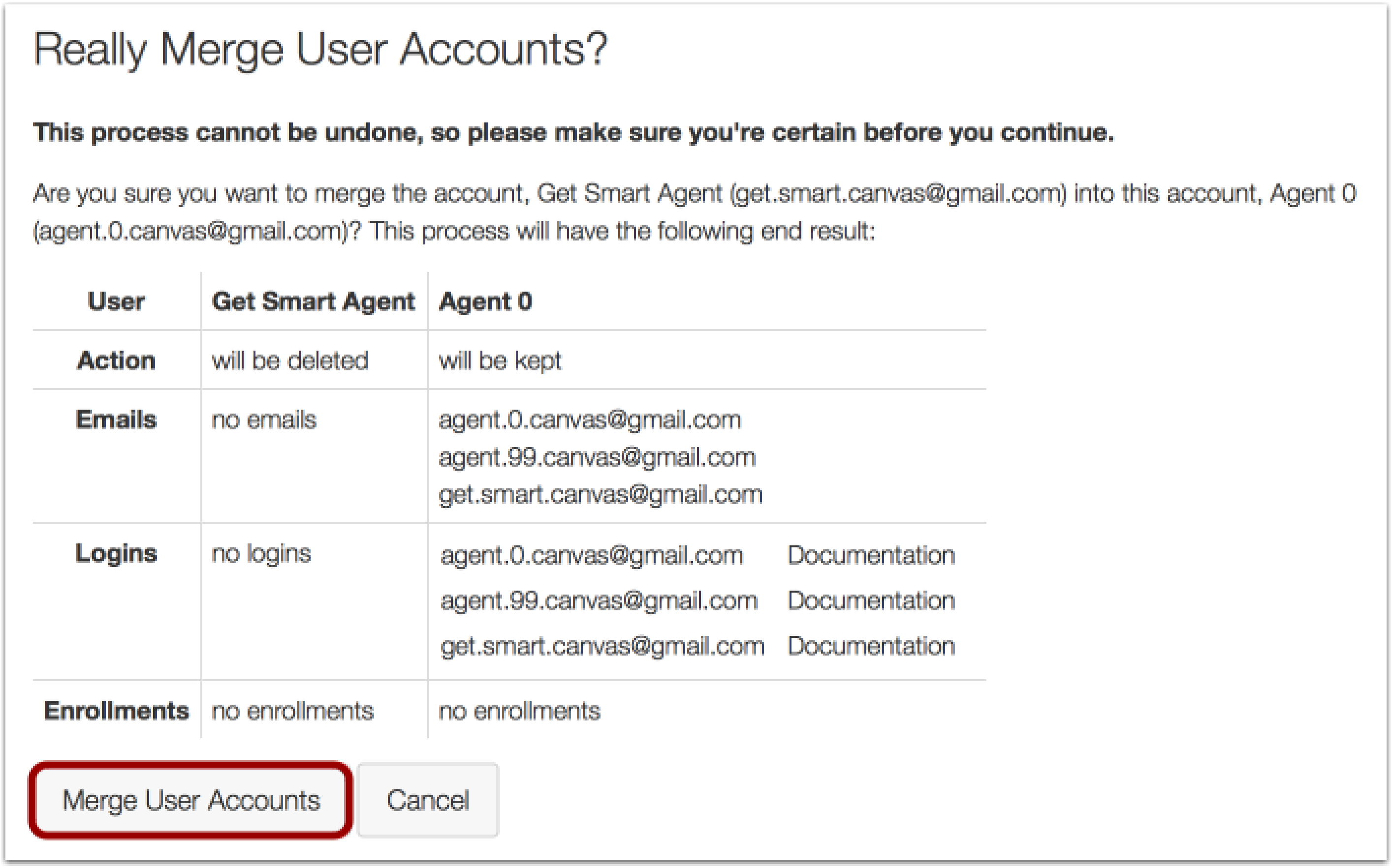
Merge User Accounts



After selecting the user account to merge, you will see the process and end result table.

1. The table will show you the **User**, **Action**, **Emails**, **Logins**, and **Enrollments** [1] of each user. The table will tell you what will be deleted and kept.
2. 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].
3. You can also click the **Merge Someone Else With [User Name]** [3] for either of the users if you decide to change the users.
4. When you are ready, click the **Prepare to Merge Users** button [4].

Really Merge User Accounts



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, so please make sure you're certain before you continue.

Merge Successful

The merge is successful when you see the message appear at the top of the window.

How do I masquerade as a user in an account?

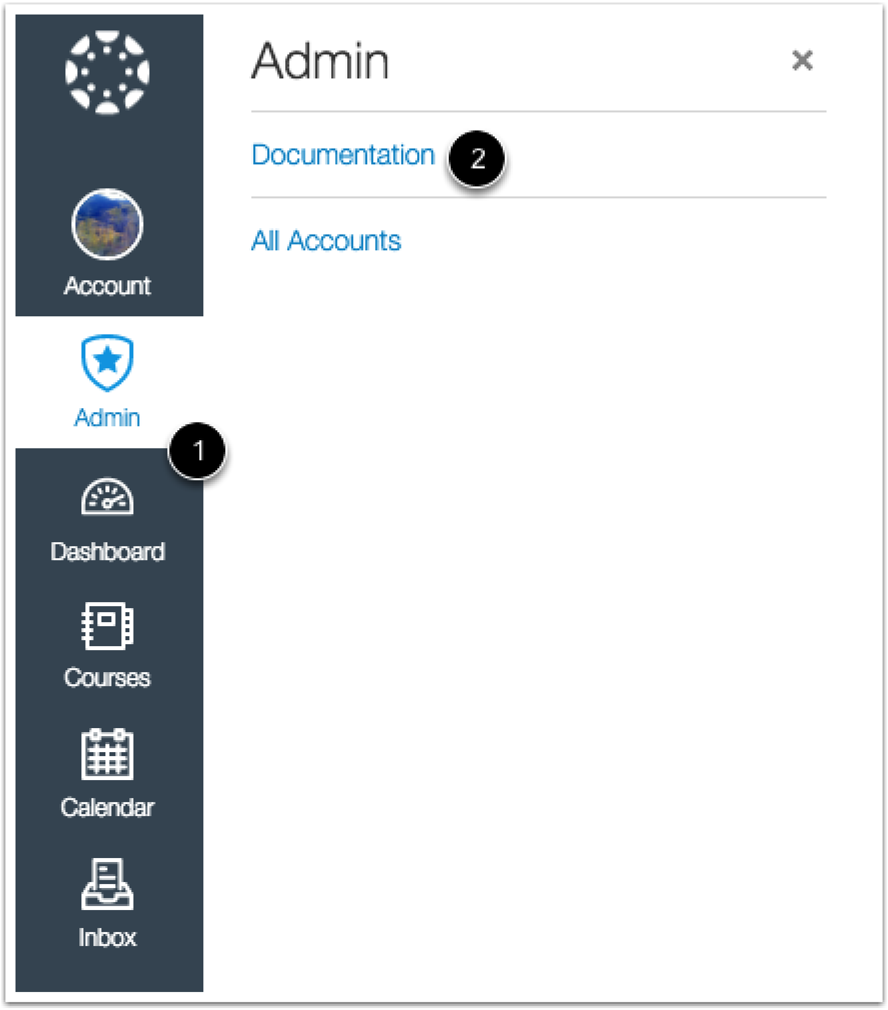
Masquerading, or becoming a user, allows admins to log in as the user without a password. You can take any action as though you are the user, but the audit logs will show that **you** performed the tasks while masquerading. Audit logs can be viewed by admins who have access to Canvas Data files.

Only account-level users with the *Become Other Users* account permission can masquerade—this permission does not apply to sub-account admins.

Notes:

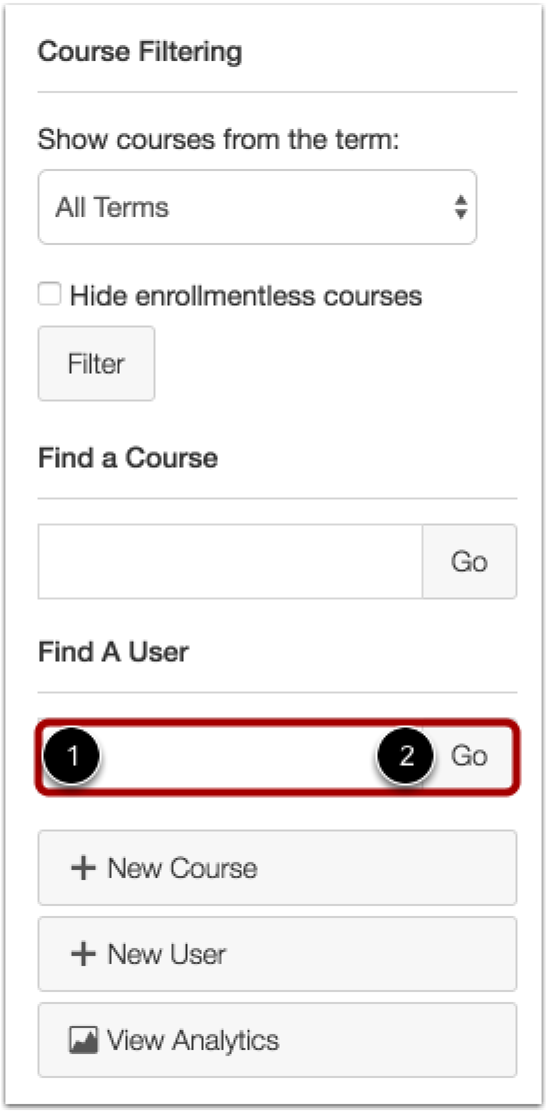
- When masquerading as a user, language preferences do not apply and will always be shown in the default language.
- If your institution has a trust agreement with another institution, trust accounts do not grant permission for you to masquerade as users associated with a different Canvas URL. You can only masquerade as users who are associated with your same account.
- Additionally, once you are masquerading, if you visit the user details page for any user, the masquerading **Become** link will still be displayed as part of the page. This behavior takes place because of an override to your masquerading permissions and helps you quickly masquerade as another user; *it does not mean* that the user for whom you are masquerading is also able to masquerade.
- Any Canvas feature that requires or modifies a user's API access token cannot be modified through masquerading.

Open Account



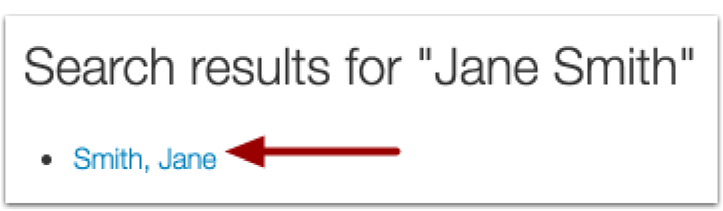
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Find a User



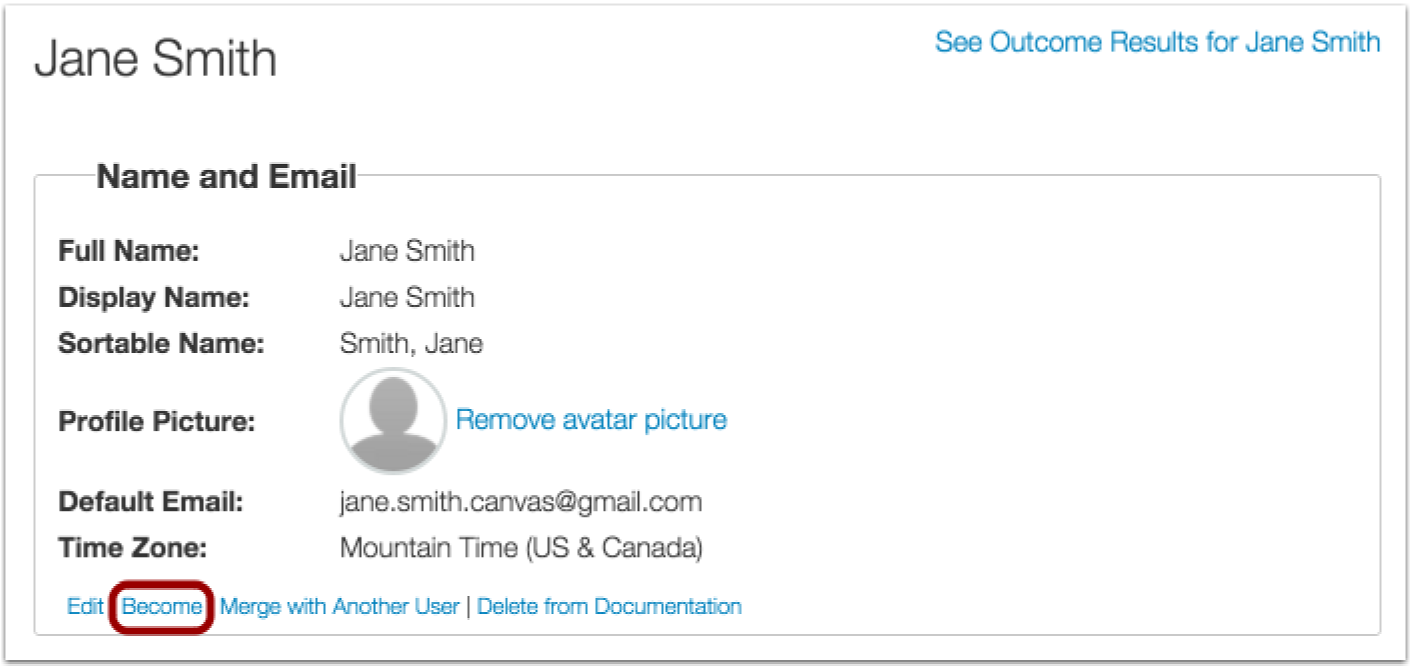
Locate Find A User on the sidebar. Type in the user's name [1] and click the **Go** button [2].

Open User Details



Click the user's name.

Become User

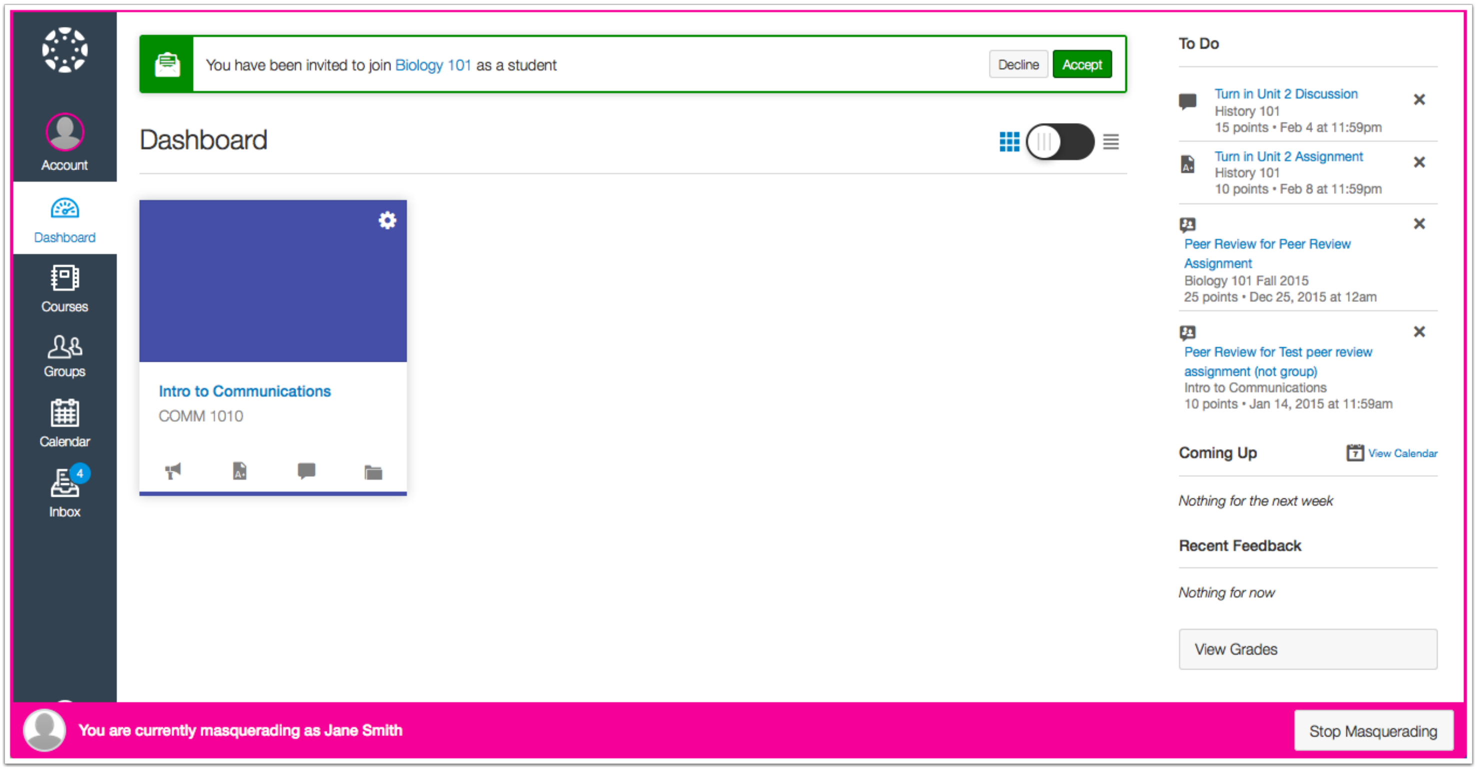


Click the **Become** link.

Masquerade as User

Click the **Masquerade as user** button.

View Canvas as User



While you are masquerading, you can act 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 masquerading by the information box at the bottom of the screen that says **You are currently masquerading as [User]**.

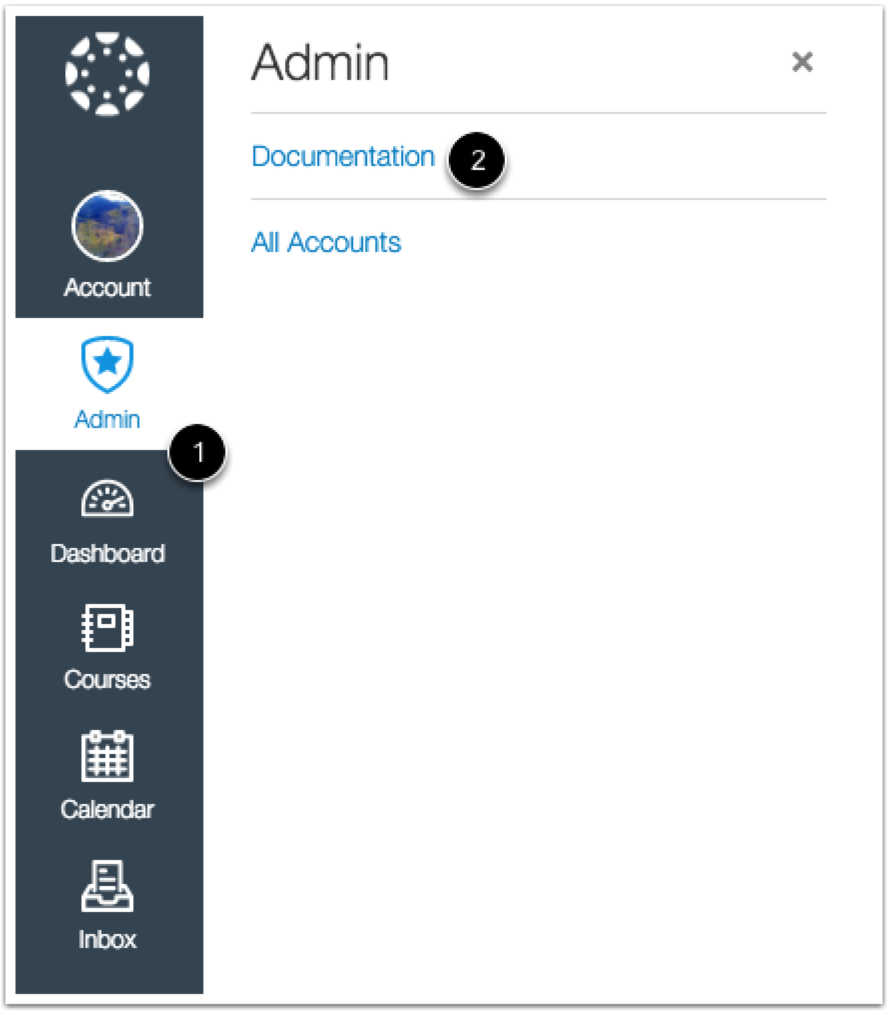
Stop Masquerading

When you are finished masquerading as the user, click the **Stop Masquerading** button.

How do I view groups in an account?

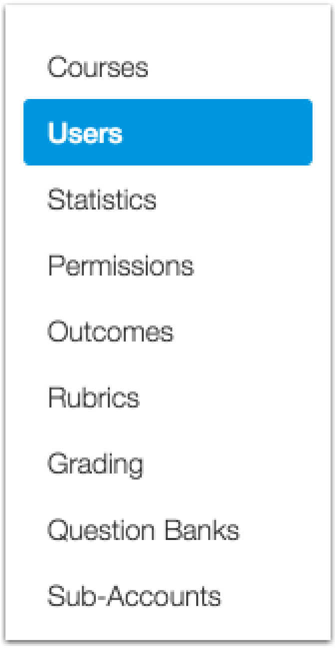
You can view existing groups in your account. Viewing groups at the account level is similar to viewing groups at the course level. The groups created at the account level will still show up in the Groups menu in the Global Navigation menu.

Open Account



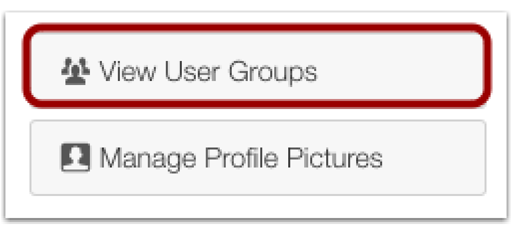
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Users



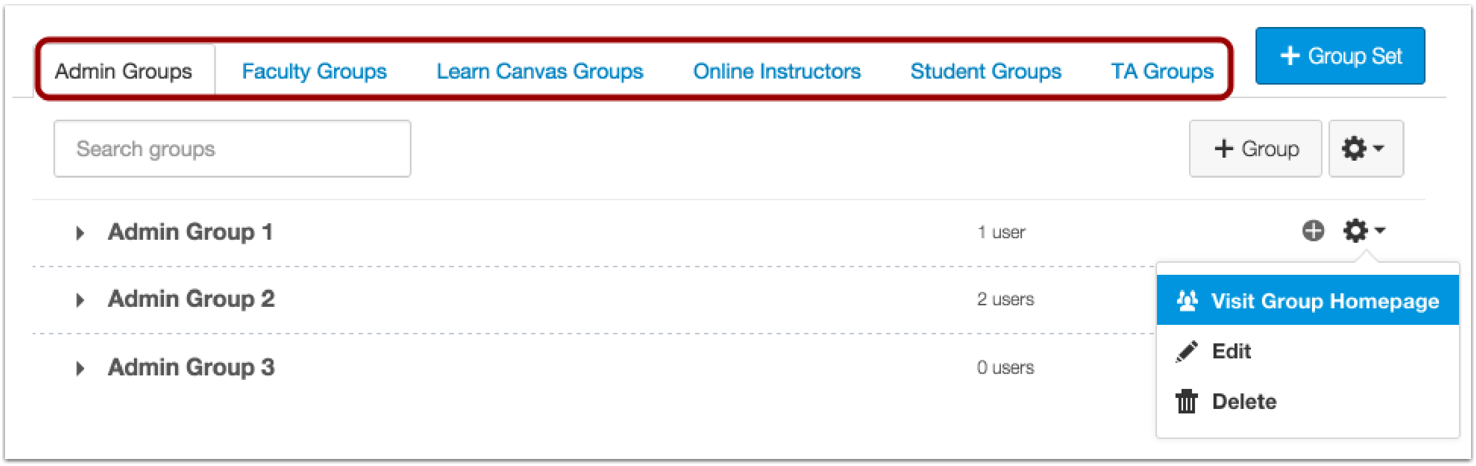
In Account Navigation, click the **Users** link.

View User Groups



Find and click the **View User Groups** button.

View Groups



View all existing groups for the account.

Learn how to create a new group set.

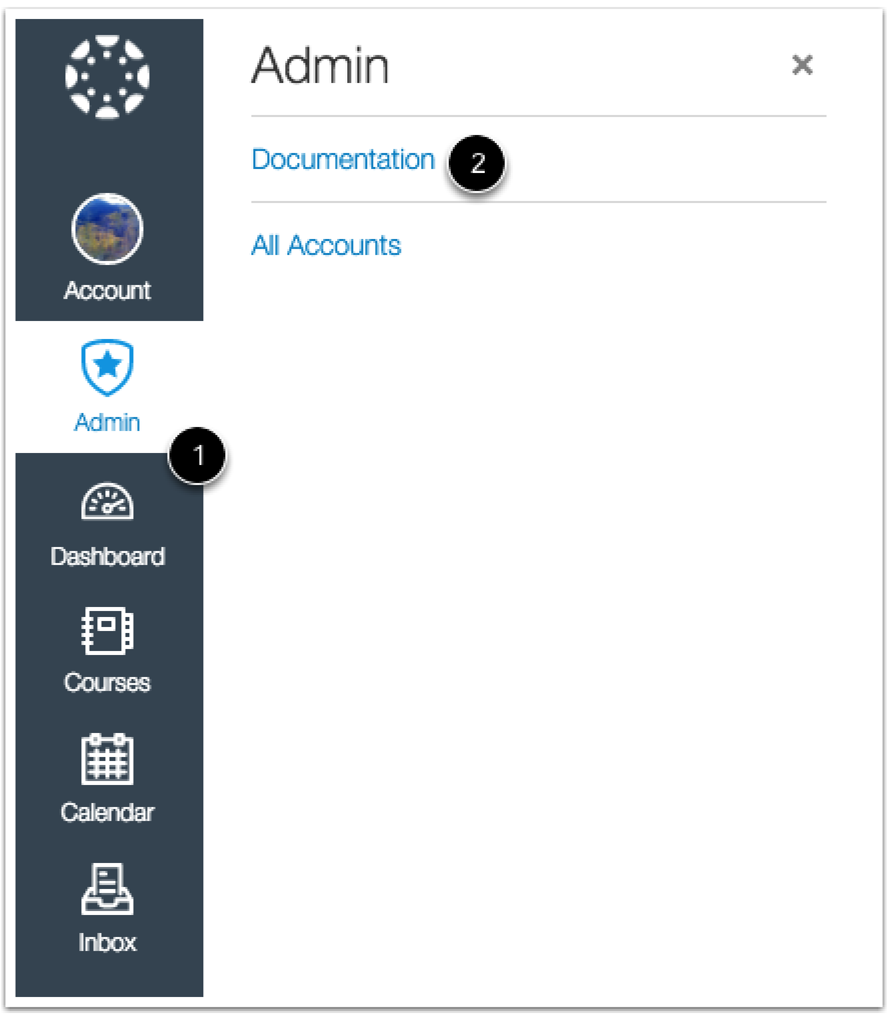
How do I create a new group set in an account?

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 Courses & Groups menu in the Global Navigation Menu. You can also create new group categories at the sub-account level.

Notes:

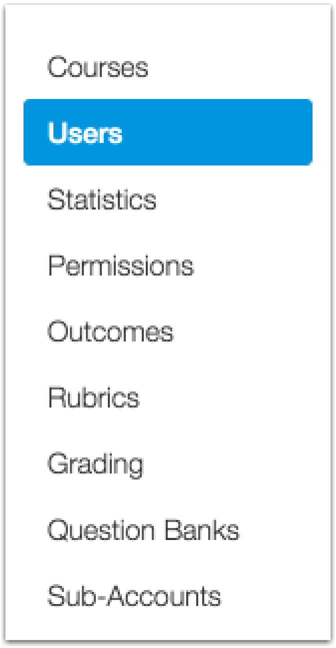
- Only admins and sub-account admins can create group sets.
- Setting up groups for the purposes of collaboration is better handled through building courses or groups under the appropriate sub-account level, since you can't assign non-admins to sub-accounts.

Open Account



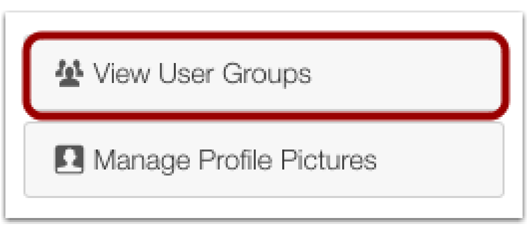
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Users



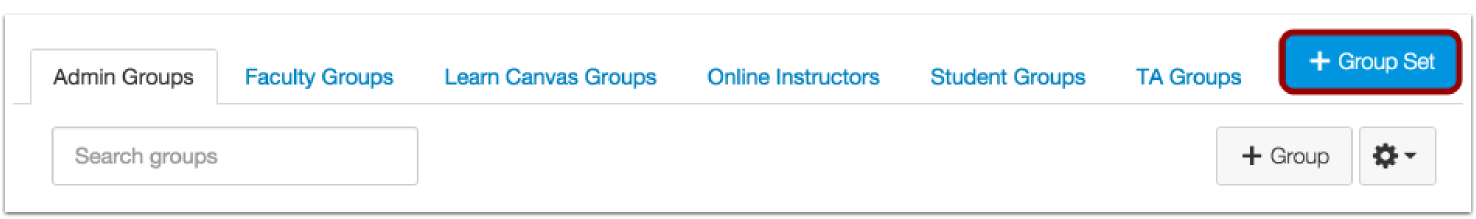
In Account Navigation, click the **Users** link.

View All Users



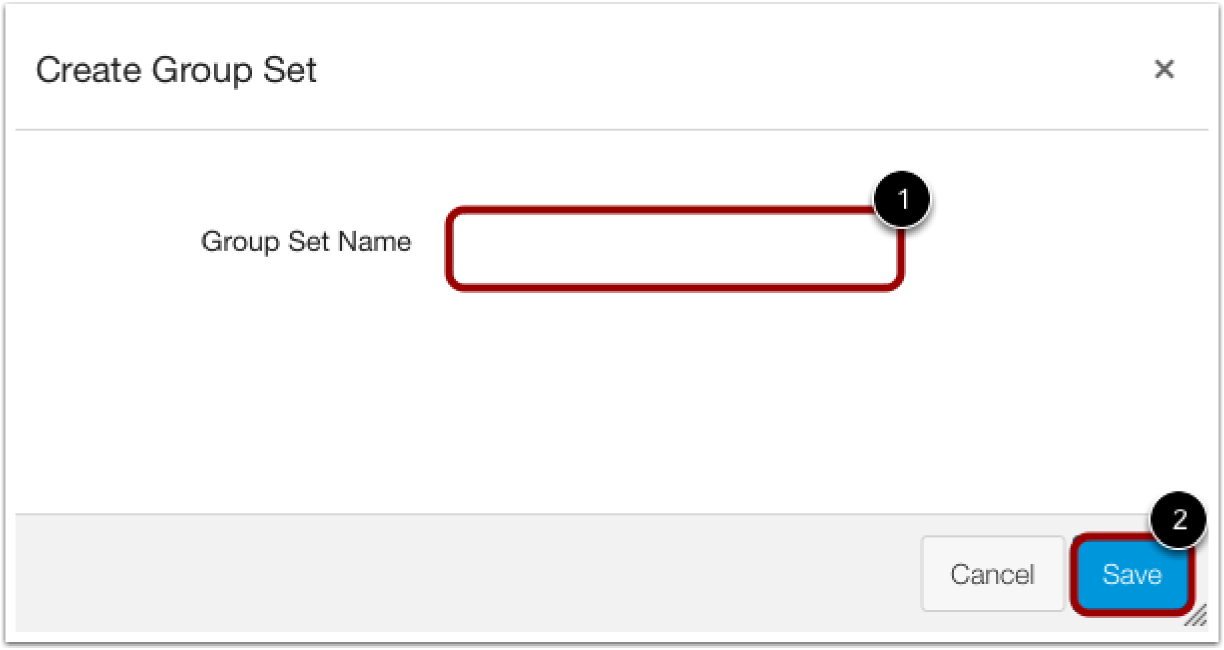
Click the **View User Groups** button.

Add Group Set



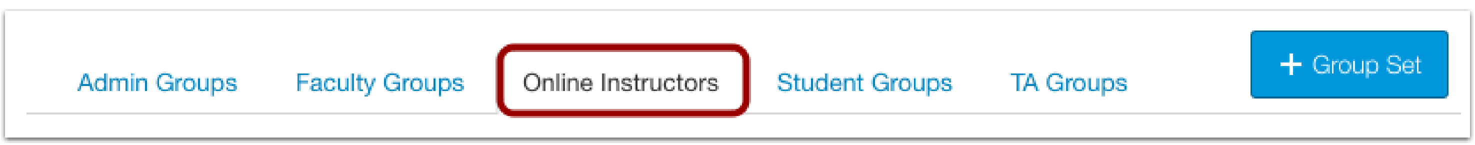
Click the **Add Group Set** button. You can create different types of Group Sets (admin, faculty, student, and TA).

Create Group Set



Type a name in a the **Group Set Name** field [1] and click the **Save** button [2].

View New Group Set



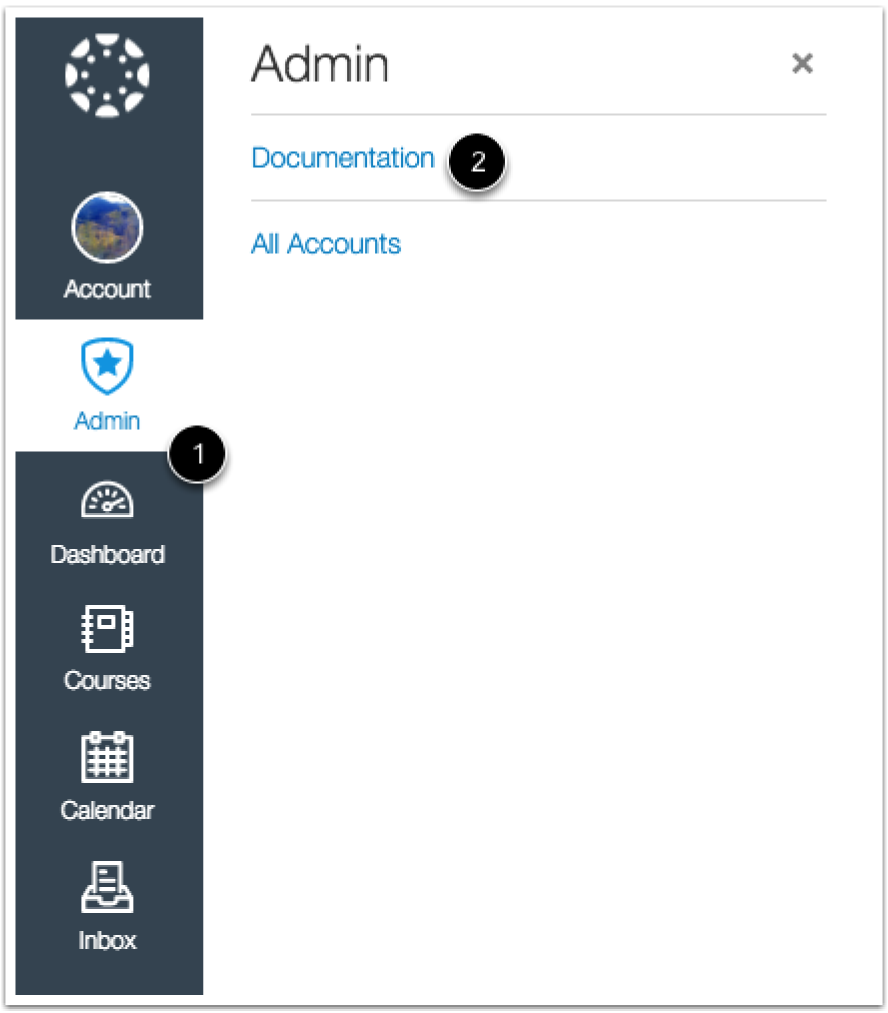
View the new group set that you created.

How do I create groups 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 Courses & Groups menu in the Global Navigation menu. You can also create groups at the sub-account level.

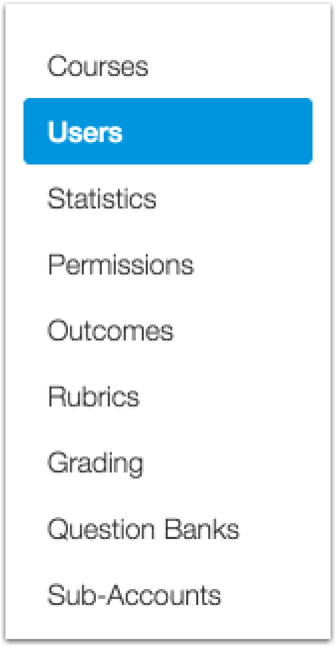
Note: Only admins and sub-account admins can create groups.

Open Account



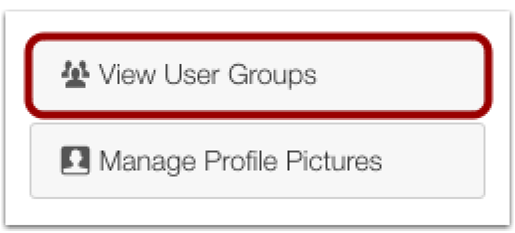
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Users



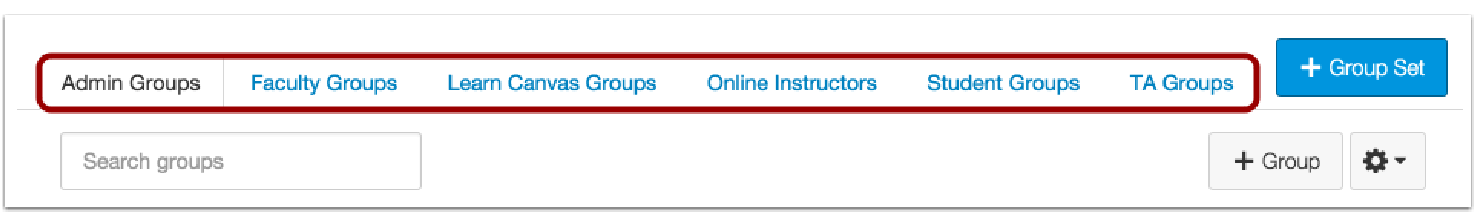
In Account Navigation, click the **Users** link.

View User Groups



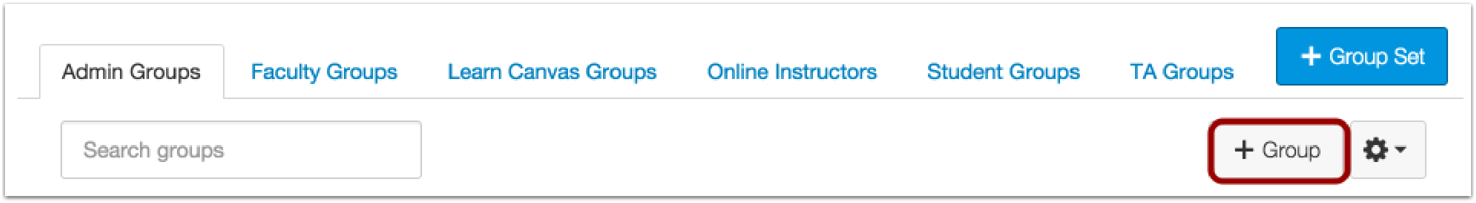
Click the **View User Groups** button.

View Group Sets



View created Group Sets. You will need to create Group Sets before adding groups.

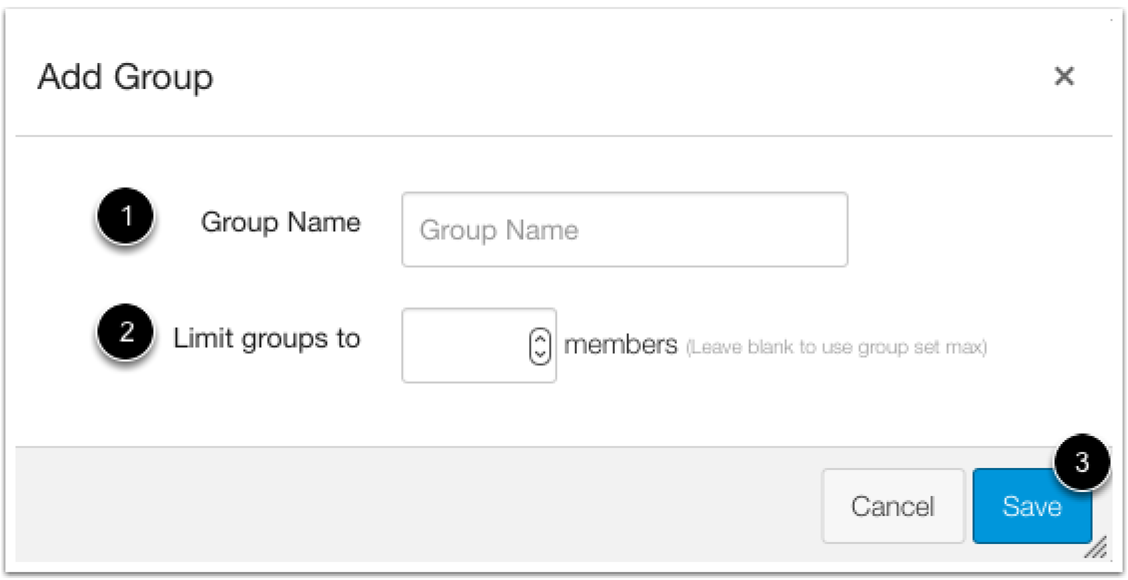
Add Group



To add a new group to the Group Set, click the **Add Group** button.

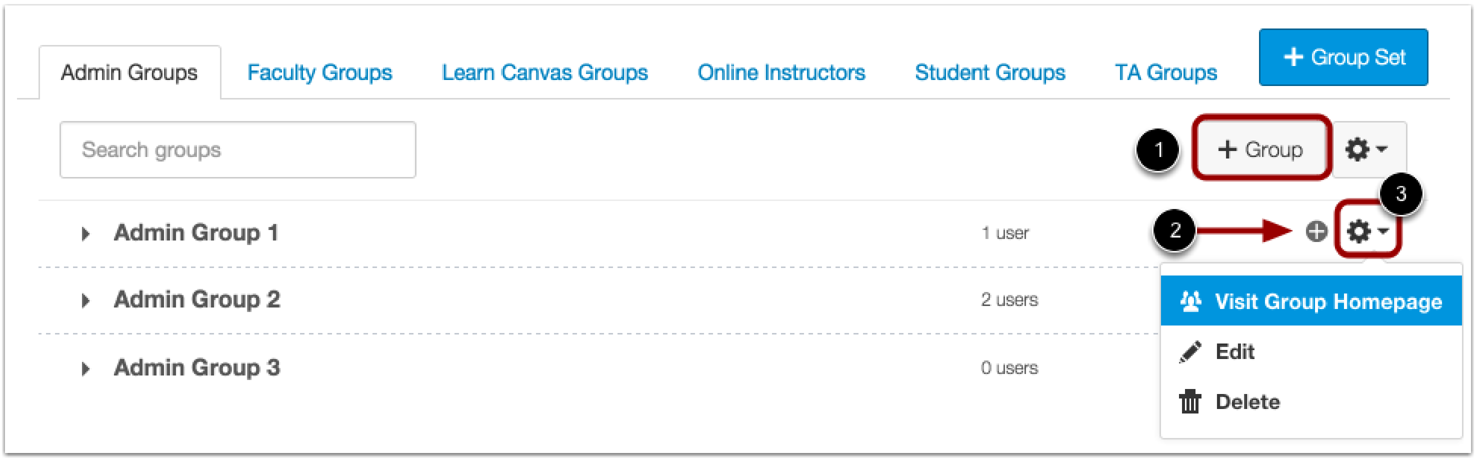
Note: The group is created in the tab you currently have open. For example, a new group is added to the Admin Groups tab when you click the Add Group button while that tab is open.

Create Group



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



To add more groups to the Group Set, click the **Add Group** button [1]. To add users to groups, click the **Add** icon [2]. To manage groups, click the **Settings** icon to select Visit Group Homepage, Edit, or Delete [3].

Note: Once users have been added, you can use the drag and drop feature to reassign users to another group.

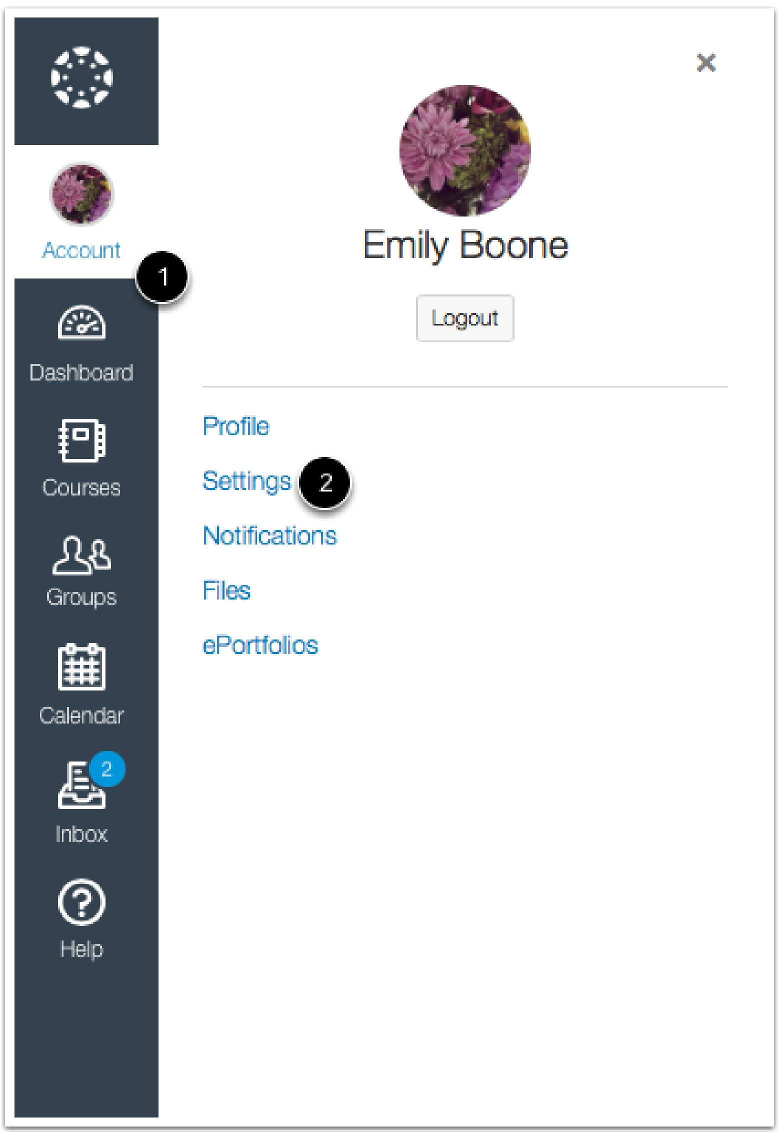
How do I manage new features in my user account?

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. Admins and instructors 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].

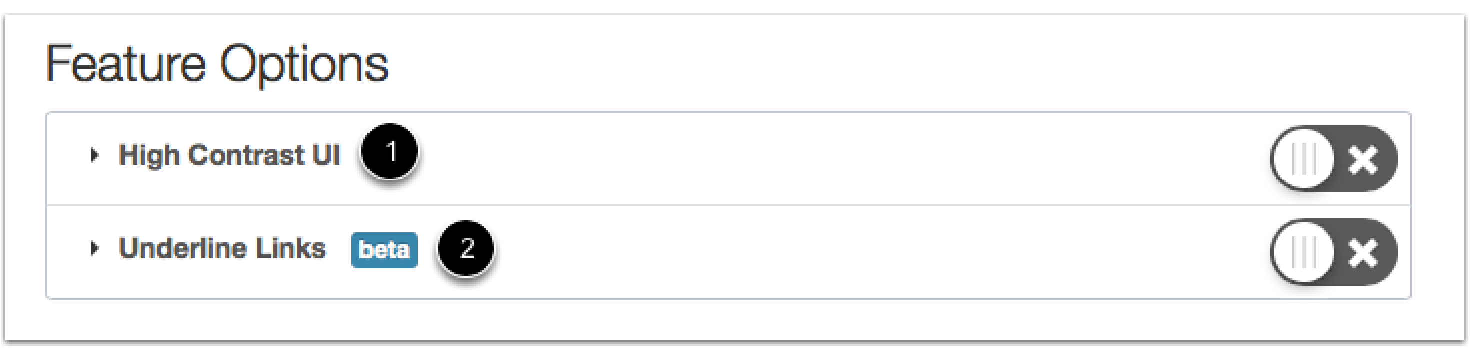
View Feature Options

Available features will appear in the Feature Options section.

View Types of Features

Each feature includes a feature description. To expand the feature box and display the description, click the arrow icon.

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. Not all institutions allow testing in beta environments.

View Feature Access

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.

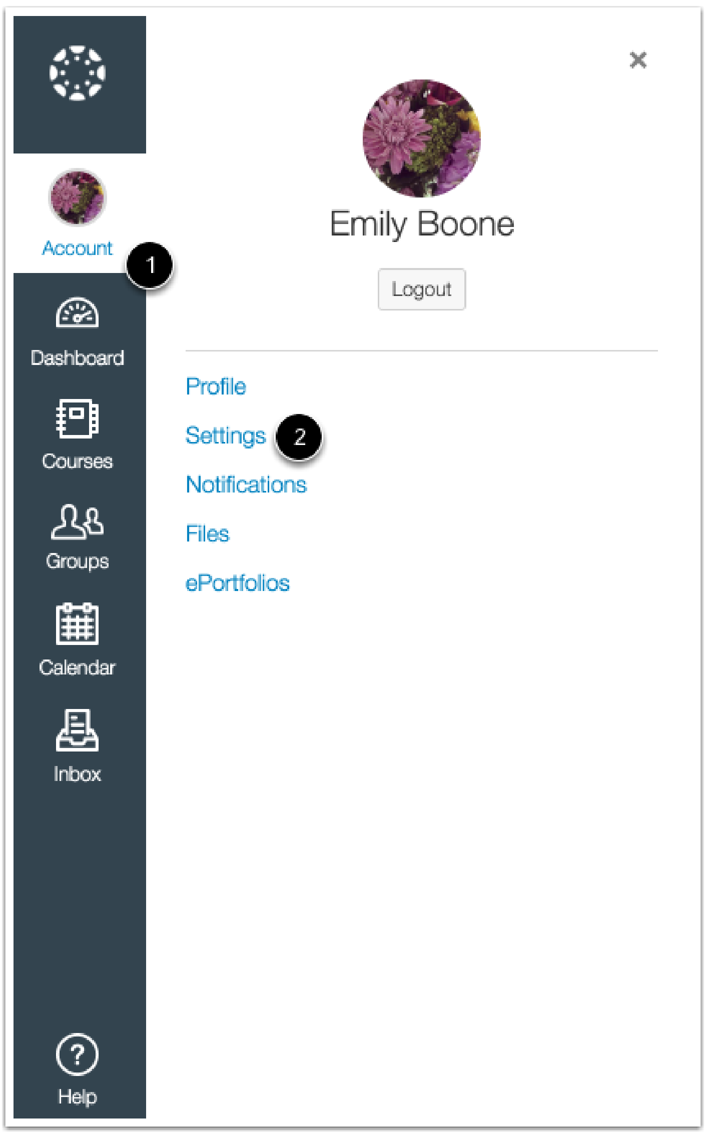
Off [2]**:** By default, the feature will be off. Leave this button unselected if you do not want to enable this feature for your user account.

How do I set a time zone in my user account?

All dates and times throughout your Canvas courses are displayed according a 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 assignments and due dates, especially if your course time zone differs significantly from where you reside.

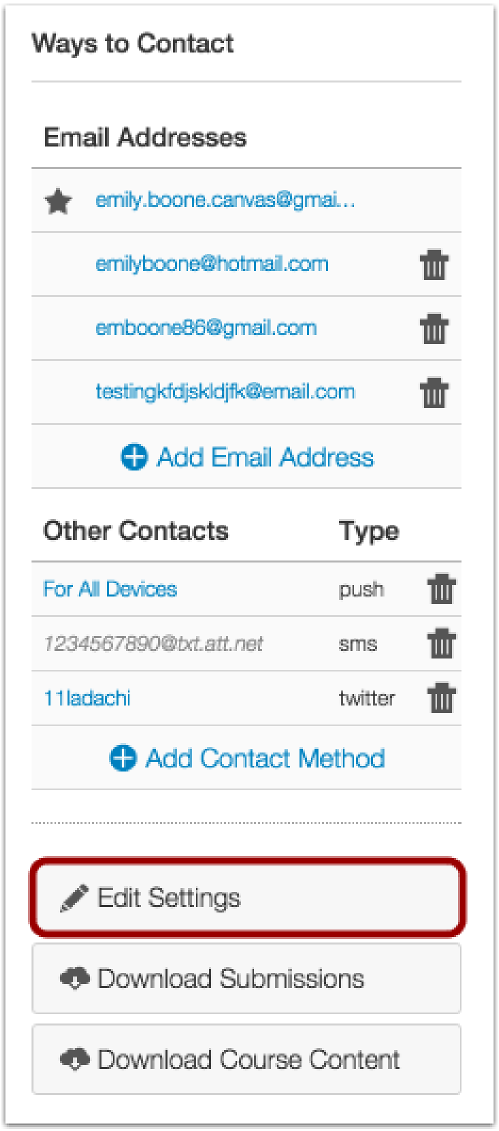
Note: If you set a time zone in your user settings, you can always view the course time zone by hovering over any date and time in your course. The text will show both the local time and course time.

Open User Settings



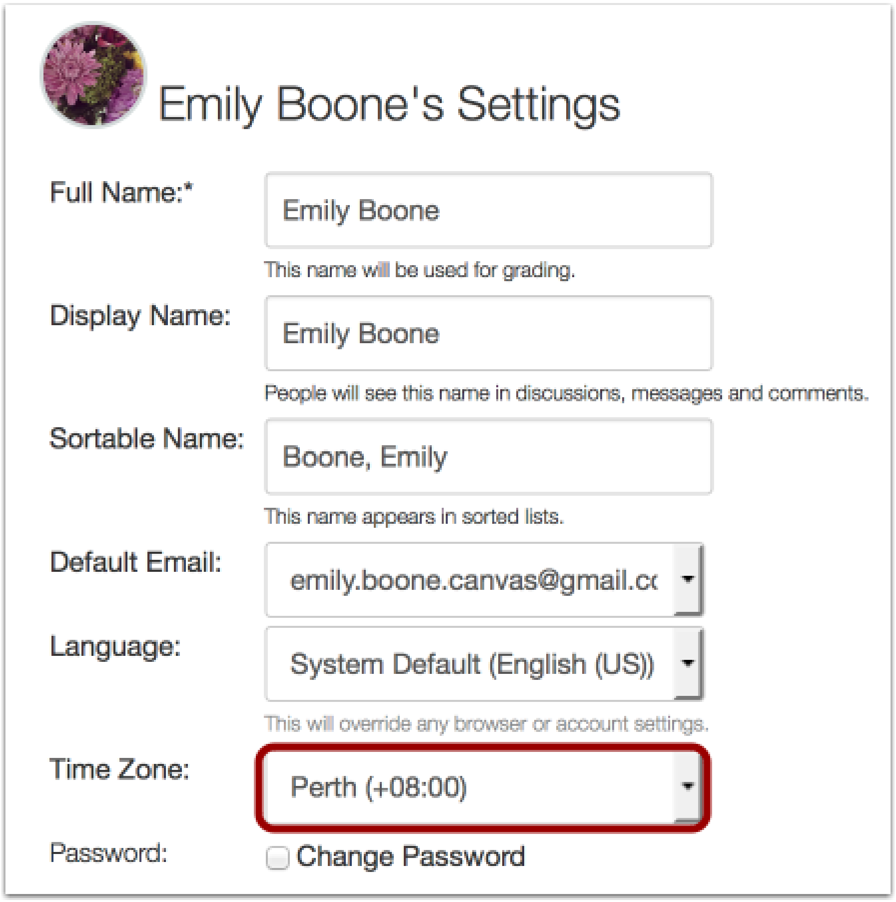
In Global Navigation, click the **Account** link [1], then click the **Settings** link [2].

Edit Settings



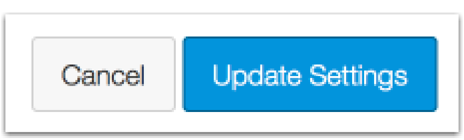
Click the **Edit Settings** button.

Set User Time Zone



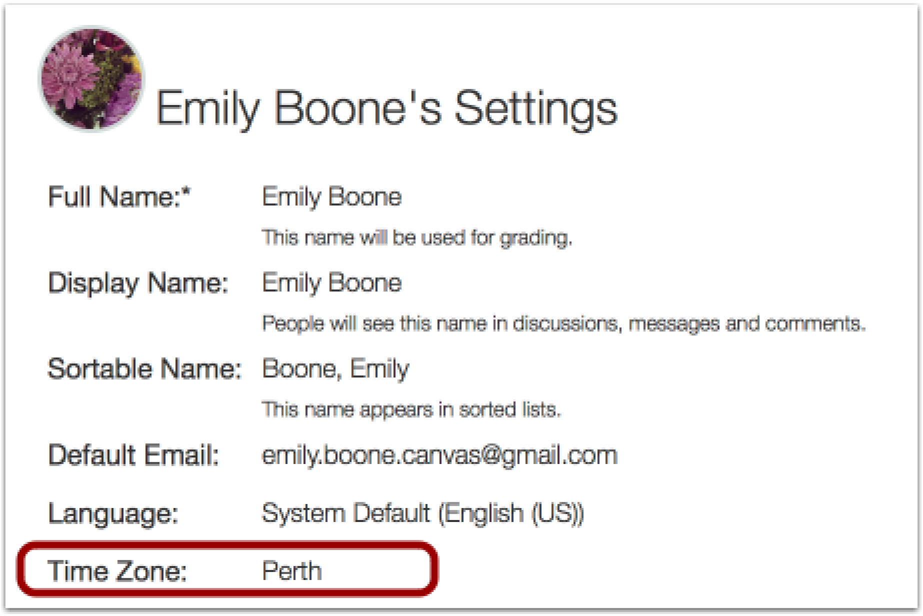
In the Time Zone drop-down menu, select a new time zone for your user account.

Update Settings



Click the **Update Settings** button.

View Time Zone



View the time zone for your user account.

Support Information

Where can I find a list of Canvas terminology?

New Canvas users may encounter new terminology throughout Canvas. This lesson is a glossary that identifies the most common terms used in Canvas.

Account

An Account represents an administrative organization unit within Canvas. Every instance of Canvas has the potential to contain a hierarchy of accounts but begins with just one account (referred to as the top-level account). An account can also contain a subaccount. Canvas admins can manage all accounts and subaccounts for their institutions.

Account also refers to a user account, which houses a user's profile, notifications, files, settings, and ePortfolios.

Activity Stream

An Activity Stream displays all recent activity in Canvas. There are two types of Activity Streams in Canvas: Global and Course. The Global Activity Stream is part of the Dashboard and shows recent activity for all courses. The Course Activity Stream is part of a Course Home Page and shows recent activity for a specific course.

Announcements

Announcements is a communication tool that allows instructors to post announcements for all users in a course. Announcements can be created in courses and groups. Canvas admins can also make announcements for an entire Canvas account. Instructors can allow students to reply to announcements.

Announcements is a link in Course Navigation.

Assignments

An assignment is any activity assessment that is created by the instructor. Assignments can include Assignments, Discussions, and Quizzes. Some assignments are submitted for no grade. Other assignments may be submitted offline but tracked in the Canvas Gradebook or be submitted online.

Assignments is a link in Course Navigation. The Assignments page lists all assignment types in a course.

Beta

Beta means a version of a product that is used for testing. Each Canvas account has a beta environment to use for exploring new features before they are released in the production environment. Canvas does not require customers to test products but feedback is always welcome.

Breadcrumbs

Breadcrumbs are the trail at the top of a page window that helps users see what page they are viewing in the course hierarchy.

Calendar

The Calendar is a communication tool that shows users all events and assignments in their courses and groups.

The Calendar is a link in Global Navigation.

Canvas Community

The Canvas Community is an external resource provided by Canvas for all Canvas customers. The Canvas Community includes the Canvas Guides, which provides all Canvas documentation and videos, Canvas Feature Ideas, community groups, and more.

Chat

The Chat tool provides synchronous video, audio, and text communication between students enrolled in a course.

When added to a course, Chat is a link in Course Navigation.

Collaborations

Collaborations is a tool that allows students and instructors to create and edit documents that can be edited by the entire course or any subset of the course roster.

Collaborations is a link in Course Navigation.

Conferences

Conferences allow instructors to create virtual classrooms and interact with their students in real time using audio, video, desktop sharing, and presentation tools. Students can also create conferences in groups.

Conferences is a link in Course Navigation.

Conversations

Conversations is a messaging tool used in Canvas to communicate with a course, a group, an individual student, or a group of students. Messages created in Conversations can be sent to one user or multiple users.

Conversations is a link in Course Navigation.

Courses

Courses are units of instruction in one subject that typically last one term. Courses can be created by Canvas admins or instructors.

Course Home Page

The Course Home Page is the first page that students see in a course. The Course Home Page can be customized to display content based on an instructor's preference.

The Home Page is a link in Course Navigation.

Course Import Tool

The Course Import Tool allows content to be imported from existing Canvas courses and content packages from other LMS and textbook publishers. The Course Import Tool is located in Course Settings.

Course Navigation

Course Navigation is a menu on the left side of a Canvas course. Course Navigation consists of navigation links directed to all the feature areas within a course. Instructors can customize Course Navigation for each course.

Course Setup Checklist

The Course Setup Checklist is a tool for instructors who are new to Canvas and need help setting up a Canvas course. The Course Setup Checklist is located on the Course Home Page.

Course Statistics

Course Statistics are an instructor tool that summarizes overall student participation in the course.

Course Status

Course Status refers to the state of a Canvas course. All new Canvas courses begin in an unpublished state, where admins can manage course enrollments and instructors can prepare content and assignments for students. A published state means the course is available to students. A concluded state means the course has ended and users can access content in a read-only format.

CSV File

A comma separated value (CSV) file is a file type designed for importing and exporting content. Instructors can create a CSV file from Excel or Google Docs.

Dashboard

The Dashboard is a panel of content that acts as the Canvas default landing page and provides an overview of all Canvas activity for a user. The Dashboard shows all courses and groups, recent activity, to-do items, upcoming assignments, and recent feedback.

Discussions

Discussions is a forum designed to facilitiate informal communication between students in a course. Discussions can also be created as assignments for grading purposes. Students can also respond to informal and graded discussions in the context of a group. All Discussions content is public, and all course students can view and reply to a discussion.

Discussions is a link in Course Navigation.

ePortfolios

ePortfolios allow students to showcase their best work to colleagues and prospective employers. They also make it possible for students to create light-weight websites or presentations.

ePortfolios is a link in User Navigation.

Files

Canvas provides a file repository for each user, group, and course. Files can be public or private.

Files is a link in User Navigation or Course Navigation.

Global Navigation

Global Navigation is the menu that appears on every Canvas page. Global Navigation consists of navigation links that direct users to frequently-used features in Canvas.

In the New Canvas User Interface (UI), Global Navigation is located on the left of every Canvas page.

Gradebook

The Gradebook stores information about student progress in Canvas. Canvas includes two types of gradebooks: a standard gradebook that provides a collection of numerical or letter-grade assessments, and a Learning Mastery Gradebook that compiles assessments based on learning standards and outcomes.

The Gradebook is a link in Course Navigation for instructors.

Grades

Grades are a measurement of student performance. Students can calculate hypothetical grades on this page. Instructors can quickly edit grades for any course or section.

Grades is a link in Course Navigation for students.

Groups

Groups is a tool that helps instructors separate students into smaller course units. Groups can be created for students or by students to enable efficient collaboration.

Groups is a link in the Global Navigation Menu.

Help

The Help feature is part of Global Navigation and helps users get help in Canvas at any time.

Masquerade

Masquerade refers to viewing Canvas as another user. Unless granted specific permission, only admins can masquerade as Canvas users.

Math Editor

The Math Editor is a Latex-compatible toolbar that makes it easy for instructors to write math expressions and equations. Instructors and students can use the Math Editor when creating and taking quizzes.

Modules

Modules is a tool that can unify all course content into structural components. Module content can be grouped by week, topic, or day. Modules can be set up to require students to complete materials in a sequential fashion.

Modules is a link in Course Navigation.

Notifications

Notifications allow users to determine where and when they will be notified about activity in Canvas. Each Canvas user can adjust the Notification Preferences in their Profile to contact them via email or SMS on a schedule that fits their individual needs. Some users will want to be notified of course events on a more regular basis than others. Notifications are set for an entire user's account, not on an individual course basis.

Outcomes

Outcomes are statements that describe skills, understandings, and attitudes that learners will develop during a course or program. Instructors can specify learning outcomes for their courses and track student progress based on measured standards rather than letter grades.

Outcomes is a link in Course Navigation.

Pages

Pages comprises all pages created in a course. A page allows instructors to create content for a Canvas course. Students can also create and edit pages in Groups.

Pages is a link in Course Navigation.

People

People displays all users enrolled in a course. Instructors can click a student's name to view a summary of their activity in a course.

People is a link in Course Navigation.

Production

Production is the Canvas environment that contains all live data and where users interact with their Canvas courses. New and updated Canvas features are released into the production environment every three weeks.

Profile

A profile is a description that provides information about a person. Admins can choose to enable the Profile feature, which allows users to create biographies and link to social networks as part of their user account.

Quizzes

Quizzes displays all quiz assessment types in a course.

Quizzes is a link in Course Navigation.

Rich Content Editor

The Rich Content Editor is a word processor that supports instructors to create and format content within specific Canvas areas.

RSS Feed

Really Simple Syndicate (RSS) is a computer document format that allows electronic content distribution. Audio RSS feeds are also referred to as podcasts. RSS Feeds can be imported into a Canvas course via Announcements.

Rubrics

A Rubric is an assessment tool for communicating expectations of quality. Rubrics are typically comprised of rows and columns. Rows are used to define the various criteria being used to assess an assignment. Columns are used to define levels of performance for each criterion.

Sections

Sections are divisions of students within a course. All course sections view the same course content.

Settings

Settings allow admins and instructors to customize the Account or Course Navigation, add users, import content, and link to external tools.

Settings is a link in Account and Course Navigation.

SIS Imports

SIS Imports allows admins to upload and integrate data from various Student Information Systems (SIS), complex databases, and even simple spreadsheets. Imports can be done manually via the SIS Imports link in Account Navigation or automatically via the API.

SpeedGrader

SpeedGrader is a grading tool that helps instructors evaluate student work. Instructors can use rubrics for fast assessment and leave text, video, and audio comments for their students. SpeedGrader is also available as a Canvas mobile app on iOS and Android devices.

Student View

Student View is a tool used by instructors to see how their course appears to students. Activating Student View generates a Test Student that appears in a canvas course and can be used to submit assignments, reply to discussions, and upload files as a test method in the course.

Service Cloud

Service Cloud is the Canvas Support system. A support case is a formal request from a Canvas admin to receive help or direction from Canvas Support. Support Cases can be accessed by institutions using Service Cloud.

Syllabus

The Syllabus is a piece of content that outlines activities in a course.

The Syllabus is a link in Course Navigation.

Term

A term is a period of time assigned to academic instruction. In Canvas, course dates generally align with term dates, though course dates can extend beyond or be shorter than default term dates.

Test

Test is the environment used for testing real data in Canvas without affecting the production environment. The test environment is overwritten with data from the production environment every three weeks.

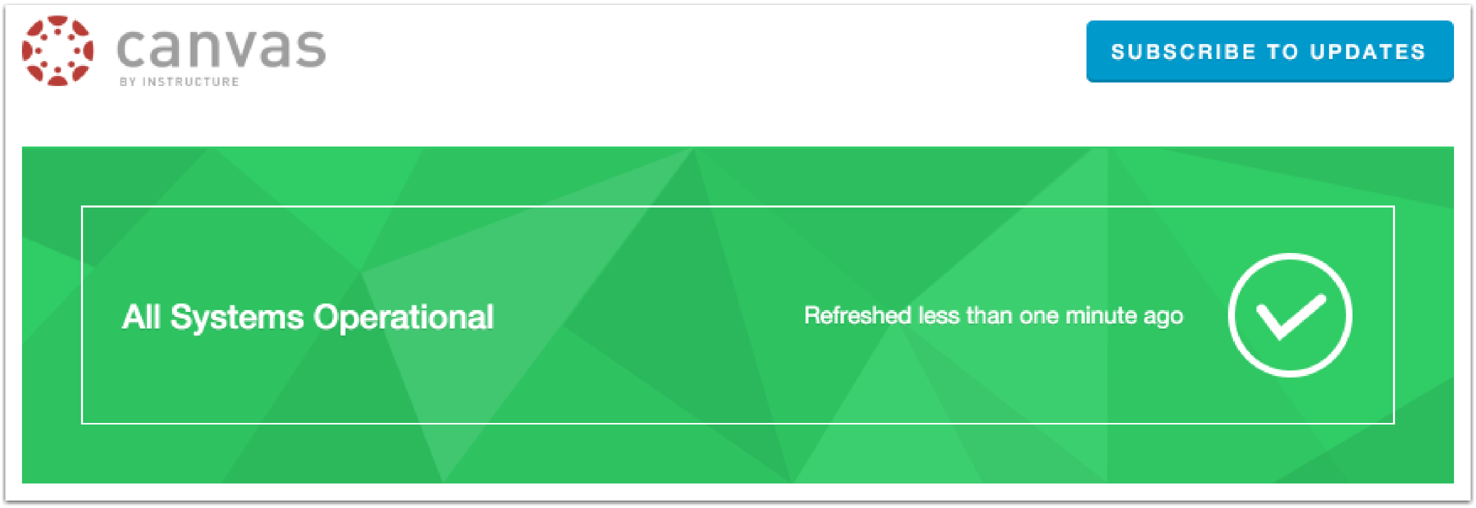
Web Services

Web Services are a collection of third-party services that users can use for notifications. Web Services currently support integrations with GoogleDocs, Skype, LinkedIn, Twitter, Delicious, Diigo, and Yo.

How will I know if there is a Canvas outage?

Stay updated on information regarding Canvas by using the Status Page or Twitter.

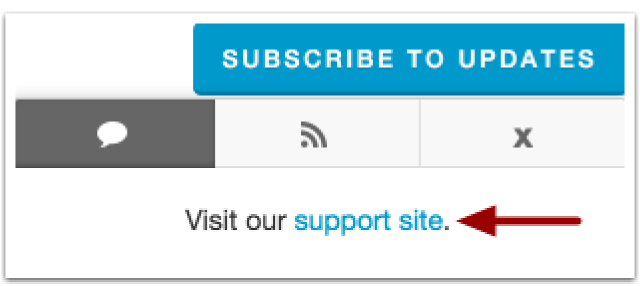
Visit the Canvas Status Updates Page



Visit status.instructure.com for incident reports regarding Canvas. The reports are global announcements that may or may not affect your institution.

To receive information from the status page, click the **Subscribe to Updates** button.

Visit the Support Site



Visit the Help Center.

Subscribe to Feed

Subscribe to the Atom Feed or RSS Feed.

Follow Canvas Updates on Twitter

Follow Canvas LMS (@CanvasLMS) for updates. This account only sends out tweets for major, Canvas-wide outages.

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.

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.

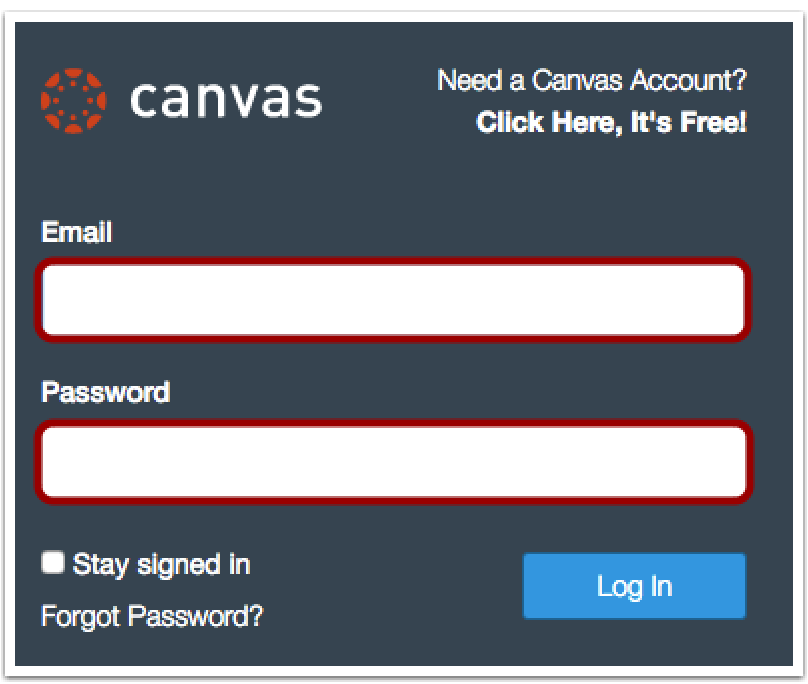
How do I log in to Service Cloud?

If you are an admin with the correct permissions, you can log in to Service Cloud and view support tickets for your institution.

Note: If you see login errors:

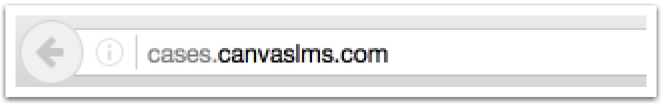
- You may need to open cases.canvaslms.com in the same browser window where you are logged into Canvas.
- You may be logged into the wrong Canvas account. Check your URL and try again.
- You may be logged into Canvas as the wrong user. Log out of Canvas and log in as the correct user.
- You may not be setup as a Field Admin. Contact your Customer Success Manager.

Log in to Canvas



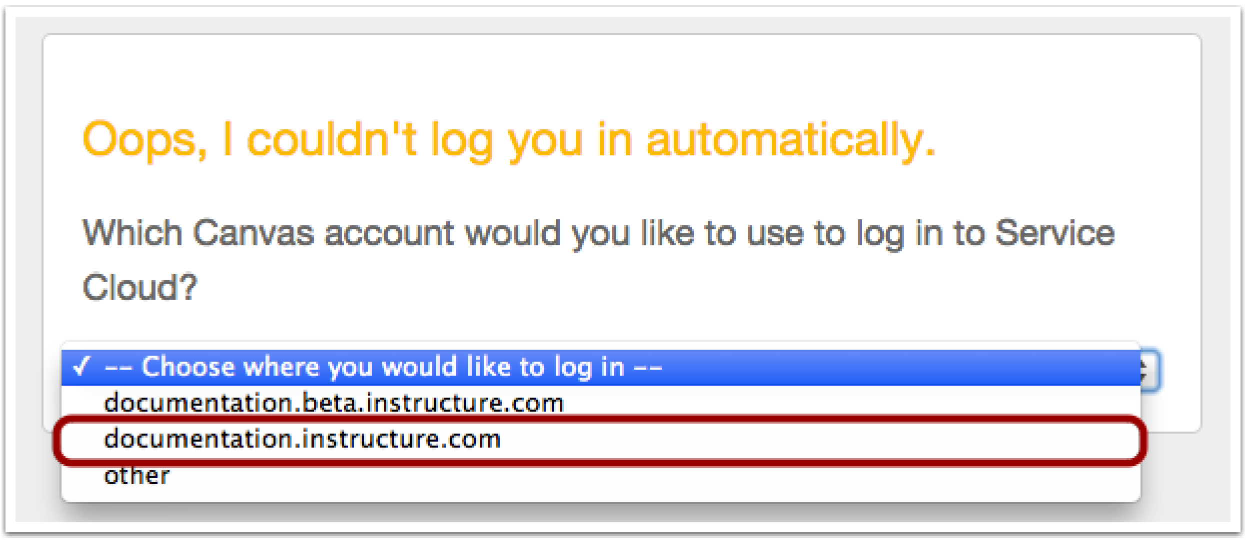
Using your institution's Canvas URL, enter your Canvas credentials and log in to your account.

Open Service Cloud



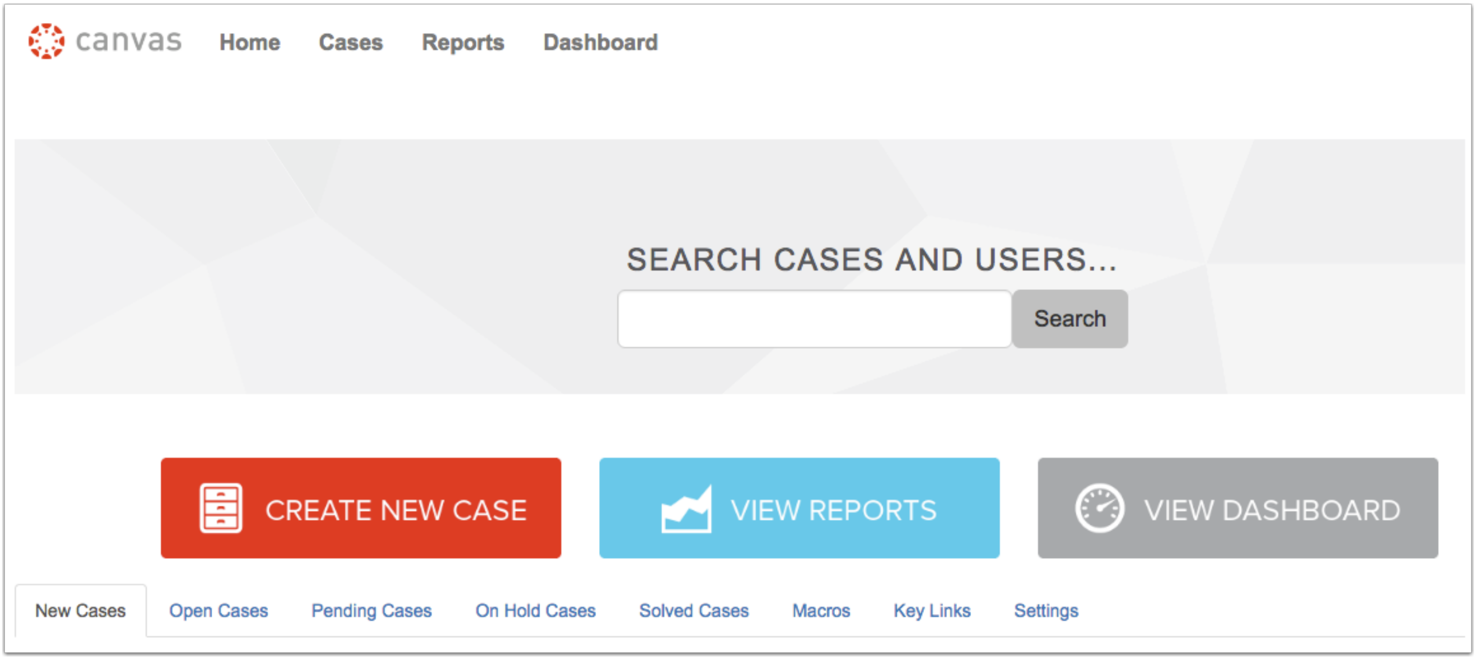
In a new browser window or tab, enter cases.canvaslms.com in the URL field.

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 to Service Cloud.

View Service Cloud



View the Service Cloud page for your account. Learn how to view the [Service Cloud Dashboard](#).

What are the different case roles in Service Cloud?

Service Cloud 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.](#)

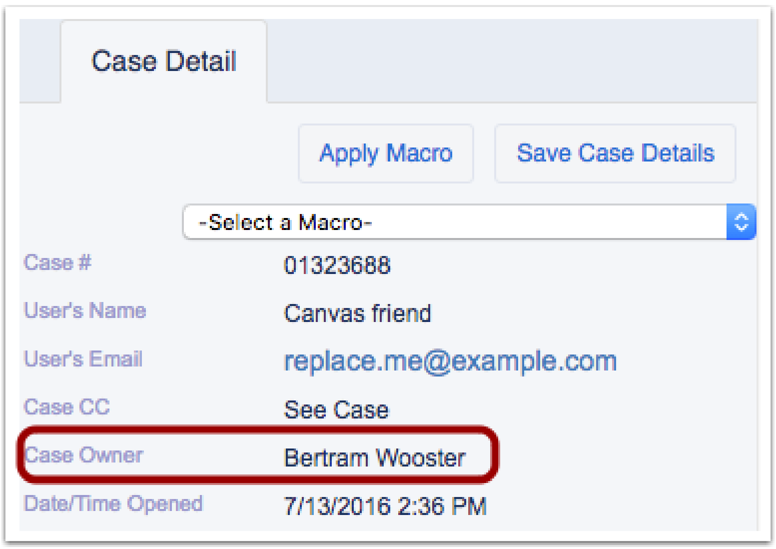
Requester

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].

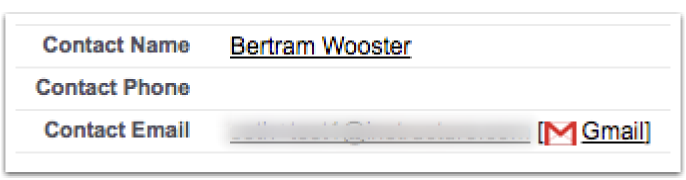
Note: If a case is created without a value in the Web Email field, the email address displays as replace.me@example.com. This address indicates that the field should be updated as soon as possible.

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 Service Cloud?

Service Cloud 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 Service Cloud. If you are interested in enabling an option or have additional questions, please contact your Customer Success Manager (CSM) or submit a Service Cloud help request.

User Type Options

User type options define specific options for users within a Service Cloud account. Learn more about [Service Cloud case roles](#).

Active User

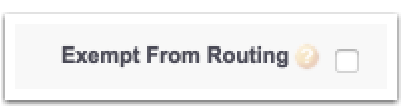
The **Active** option designates the Field Admin has access to the [Field Admin Interface](#).

Dedicated Field Admin

The **Dedicated** option designates the dedicated Field Admin for the account.

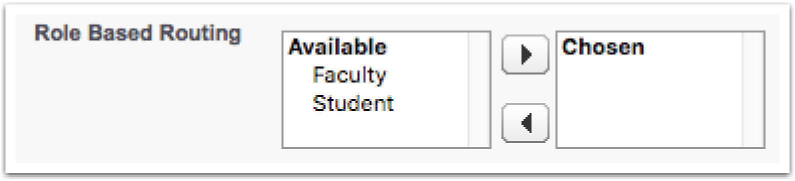
Note: There should only be one dedicated Field Admin for each account.

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.

Case Routing Options

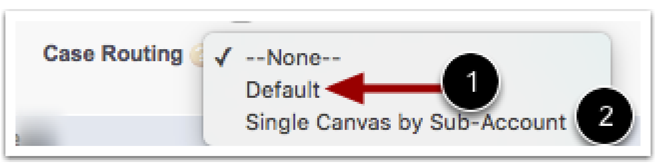
Case routing options can be adjusted to determine how cases are routed to Field Admins.

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



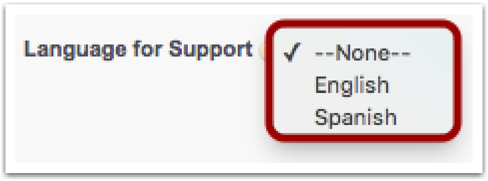
The **Case Routing** option can be set to Default [1] or Single Canvas by Sub-Account [2].

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.

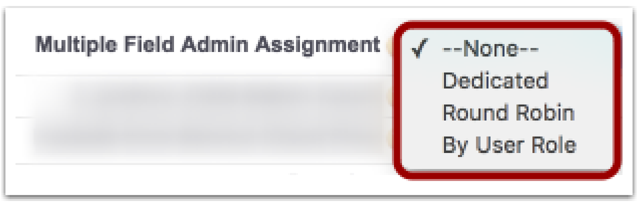
Note: The Single Canvas by Sub-Account option is not available for all accounts. Contact your CSM for more information on availability for your institution.

Language for Support



The **Language for Support** option designates which support language team will receive case escalations. If no value is set, the default is English.

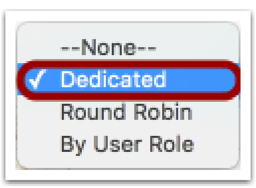
Multiple Field Admin Assignment



The **Multiple Field Admin Assignment** option has four choices: None, Dedicated, Round Robin, and By User Role.

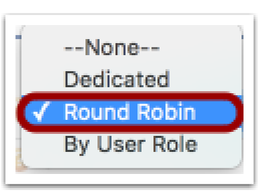
Note: If the Multiple Field Admin Assignment is set to None, the default method will be Round Robin.

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.

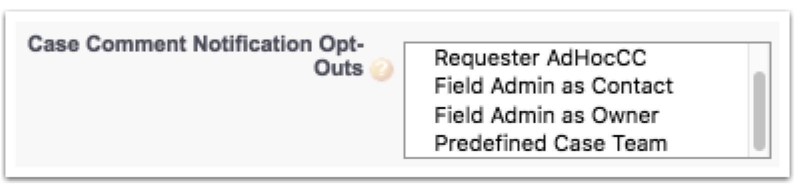
Notification Options

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.

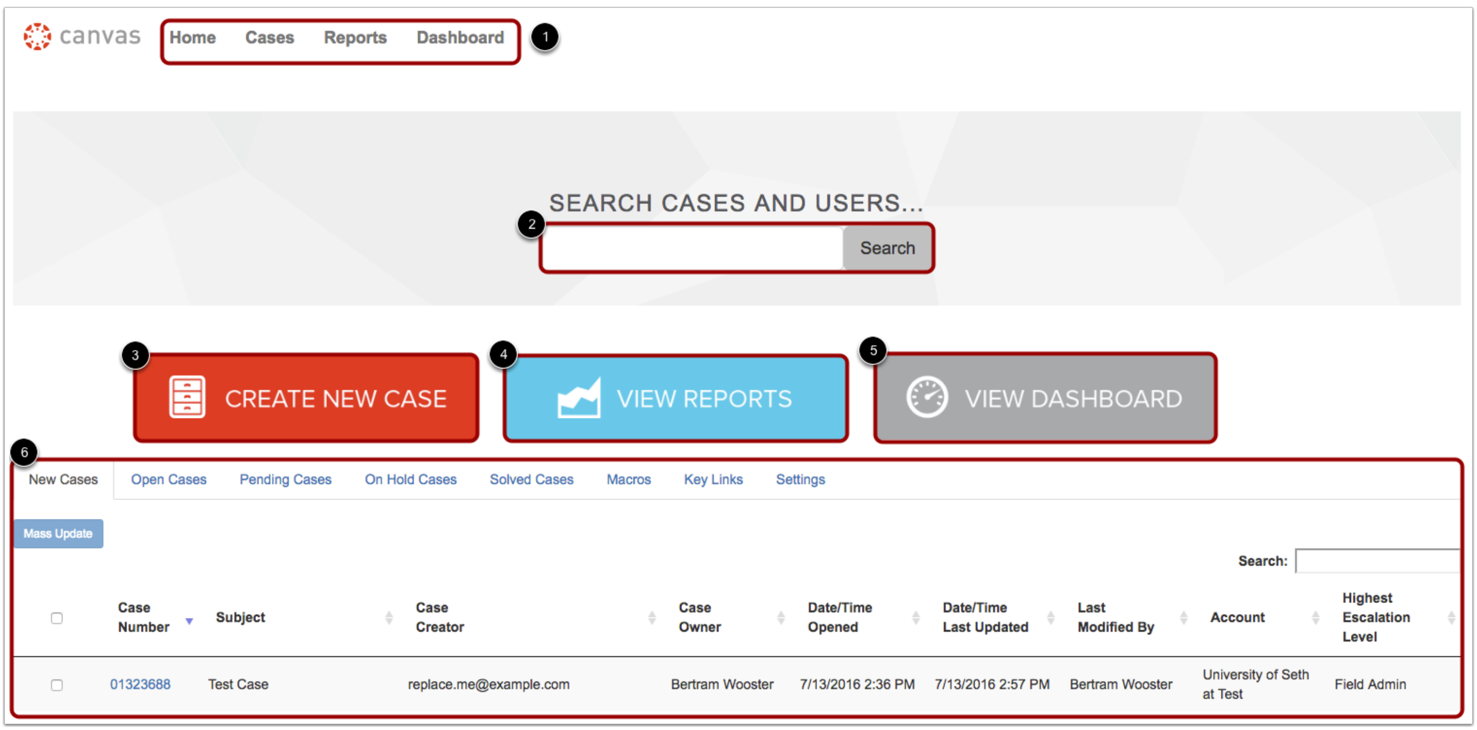
Case Survey Opt-Out

The **Case Survey Opt-Out** option controls whether a survey is sent after a case is marked solved.

How do I view the Service Cloud Home Page?

Service Cloud is the Canvas Support ticketing system. As a Field Admin, you will see a dashboard of your cases when you log in.

View Home Page



The main interface for Field Admins 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]

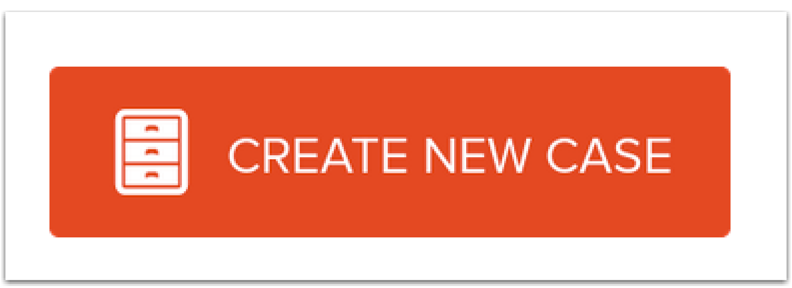
View Global Navigation

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 Service Cloud.

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



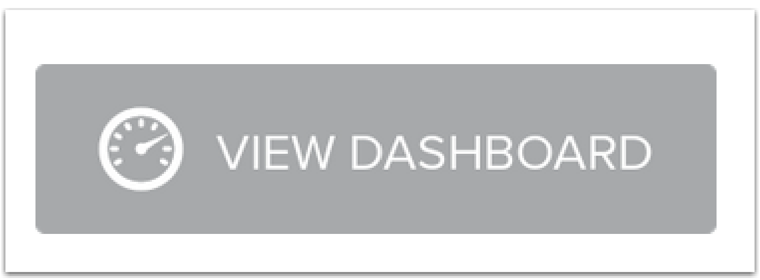
To create a new case directly in Service Cloud, click the **Create New Case** button.

View Reports

To view your reports, click the **View Reports** button.

Reports can also be accessed from the Global Navigation Menu.

View Dashboard



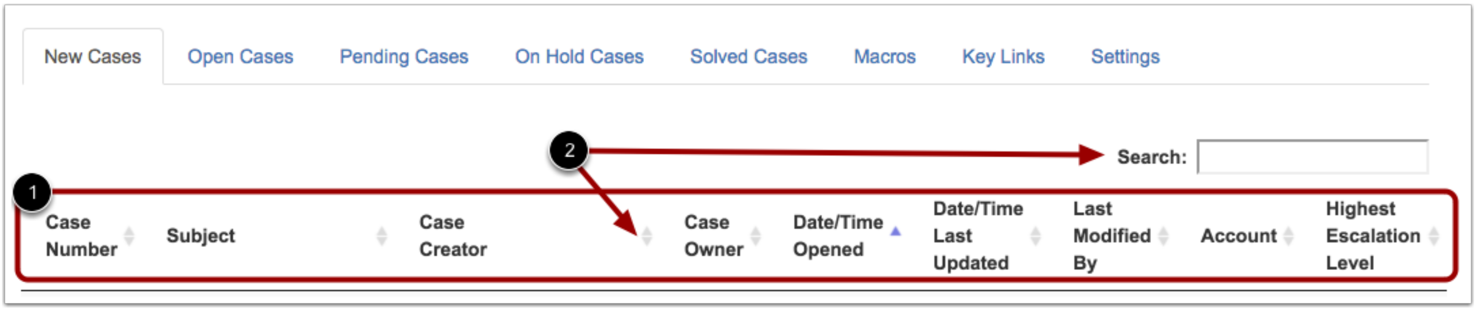
To view the dashboard, click the **View Dashboard** button.

The Dashboard can also be accessed from the Global Navigation Menu.

View Cases Table

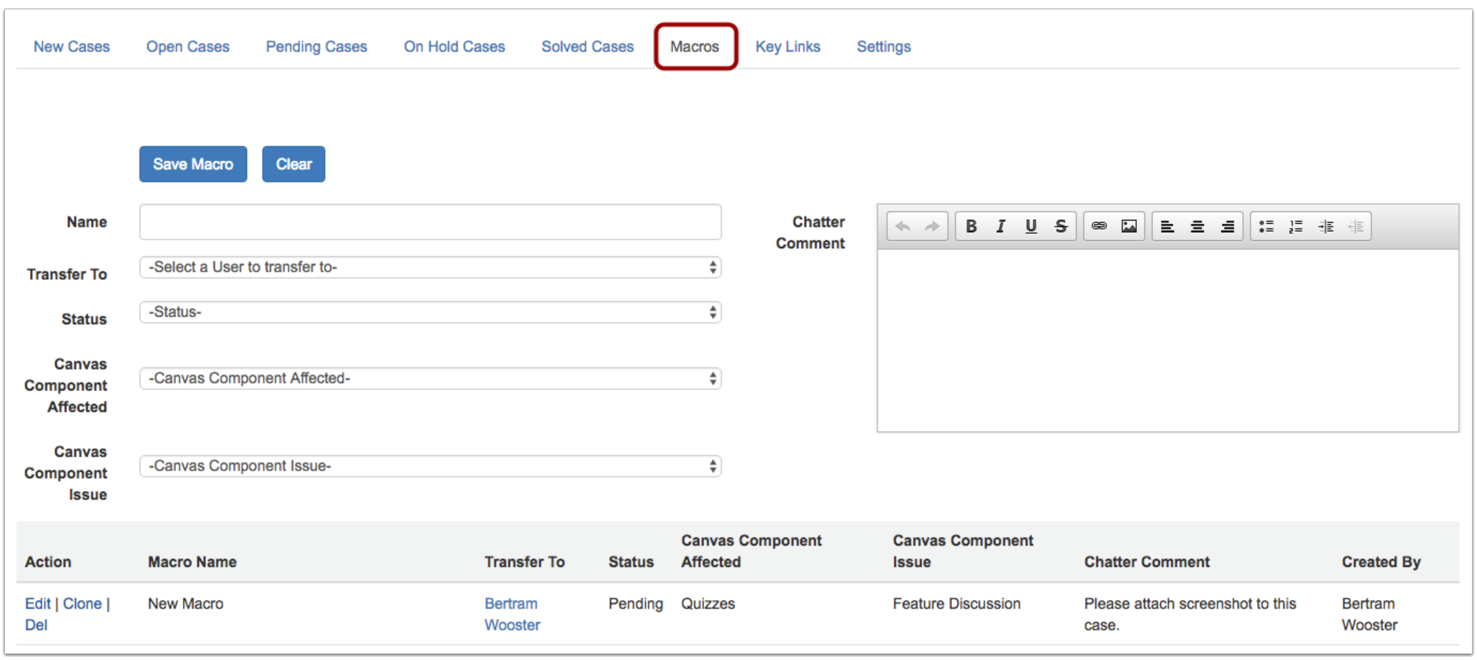
The Cases table provides links to new, open, pending, on hold, and solved cases. Learn more about Service Cloud cases.

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

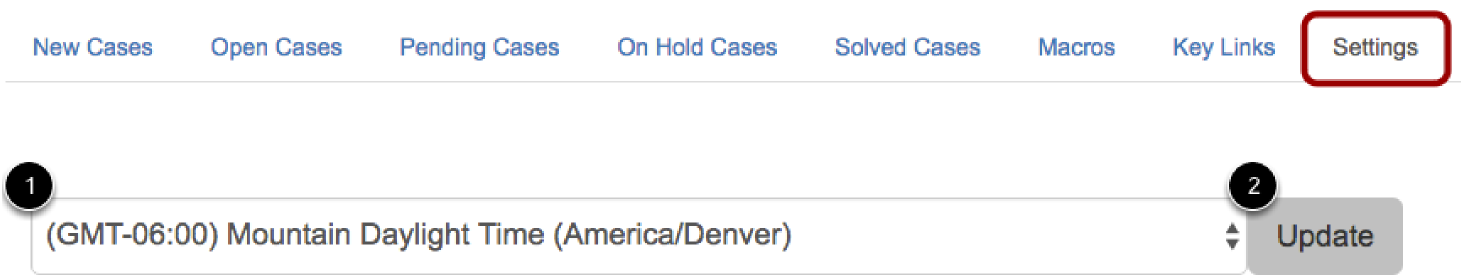


The Macros tab allows you to create new macros and view existing macros.

View Key Links Tab

The Key Links tab will provide you with helpful links to help find answers.

View Settings Tab



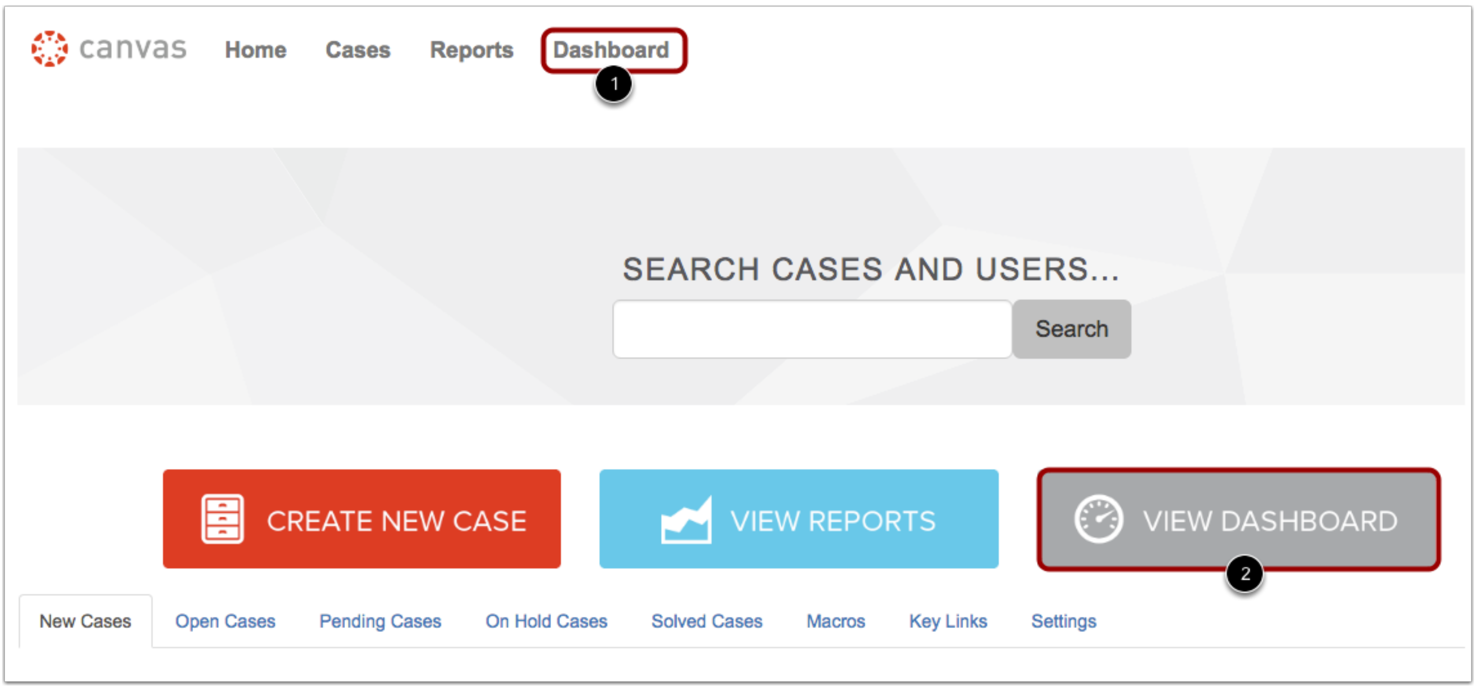
The Settings tab allows you to update the time zone for your account.

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 Service Cloud?

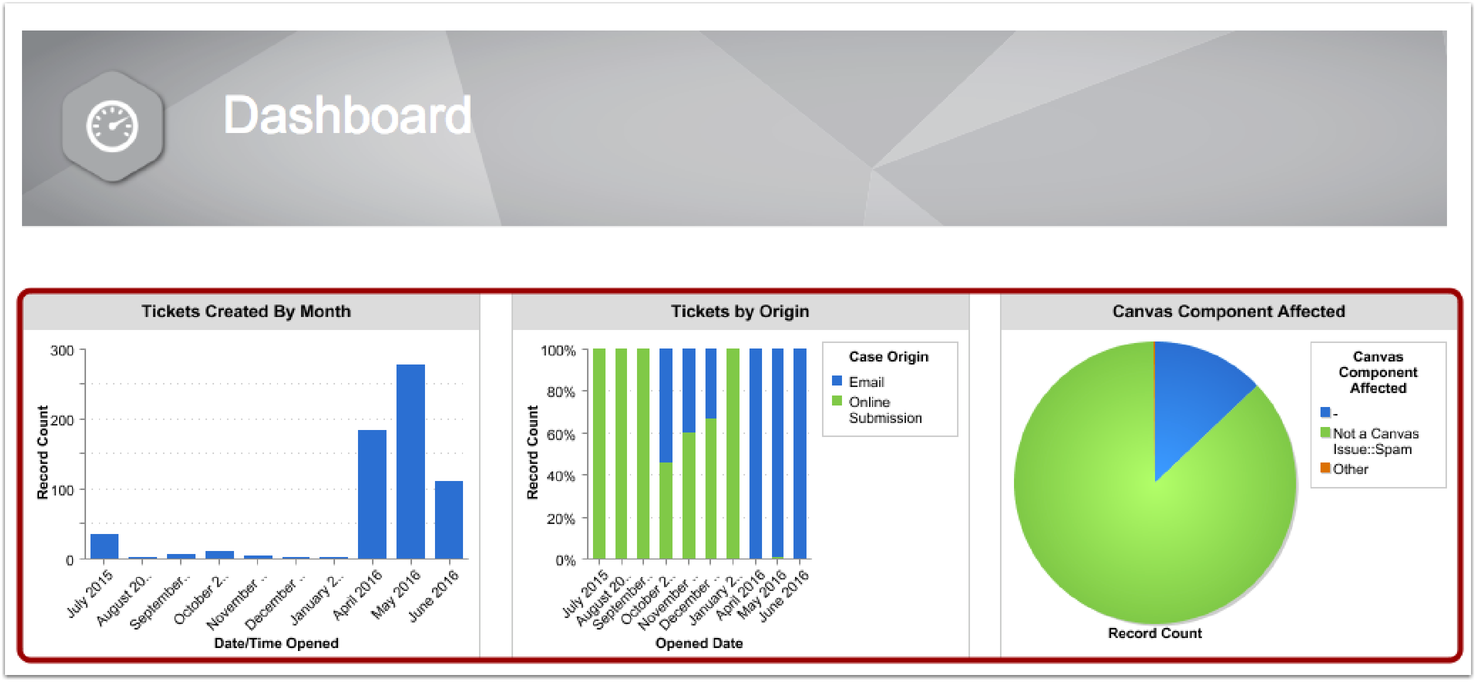
The Service Cloud dashboard provides a quick view of graphs for the default Service Cloud reports: Tickets Created By Month, Tickets By Origin, and Canvas Component Affected.

Open Dashboard



From the Service Cloud Interface, click the **Dashboard** link [1] or the **View Dashboard** button [2].

View Dashboard



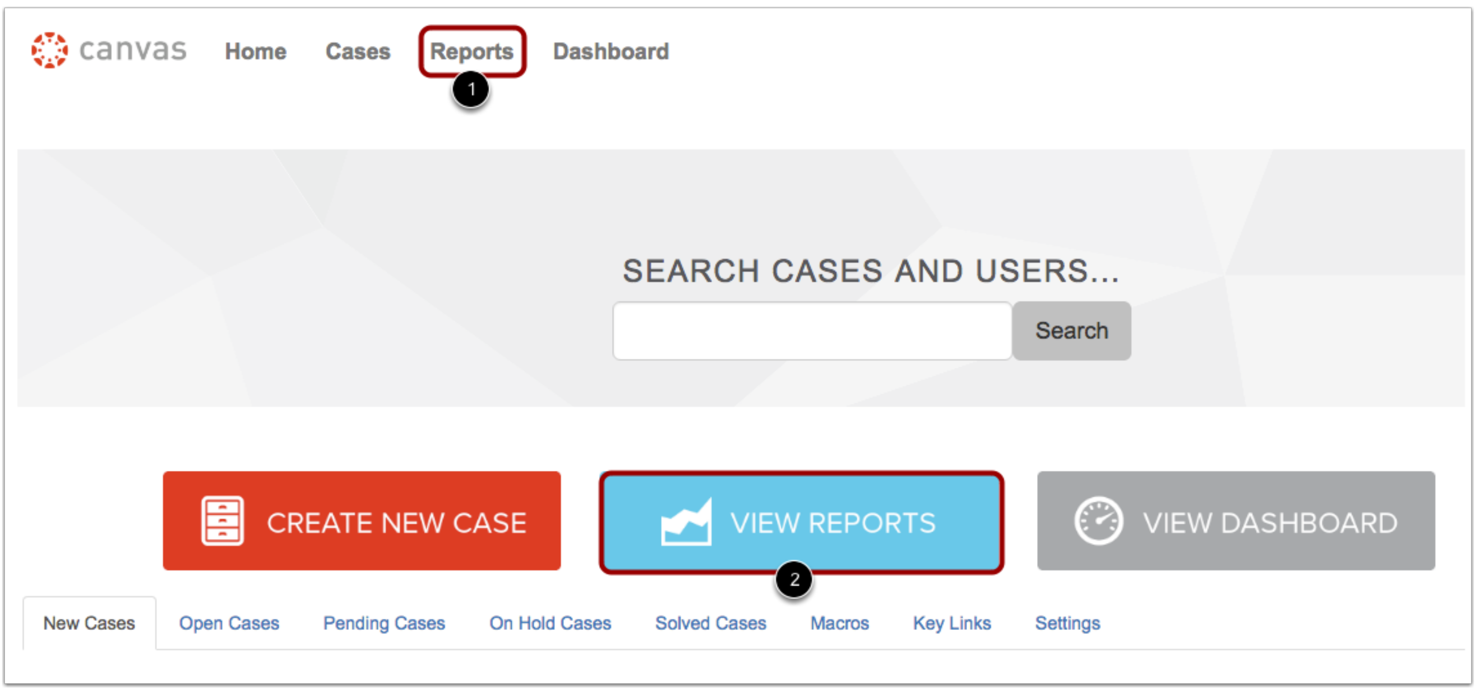
View the Dashboard. It contains graphs for Tickets Created By Month, Tickets By Origin, and Canvas Component Affected. Click a graph to view more information.

How do I view a report in Service Cloud?

Service Cloud reports 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.

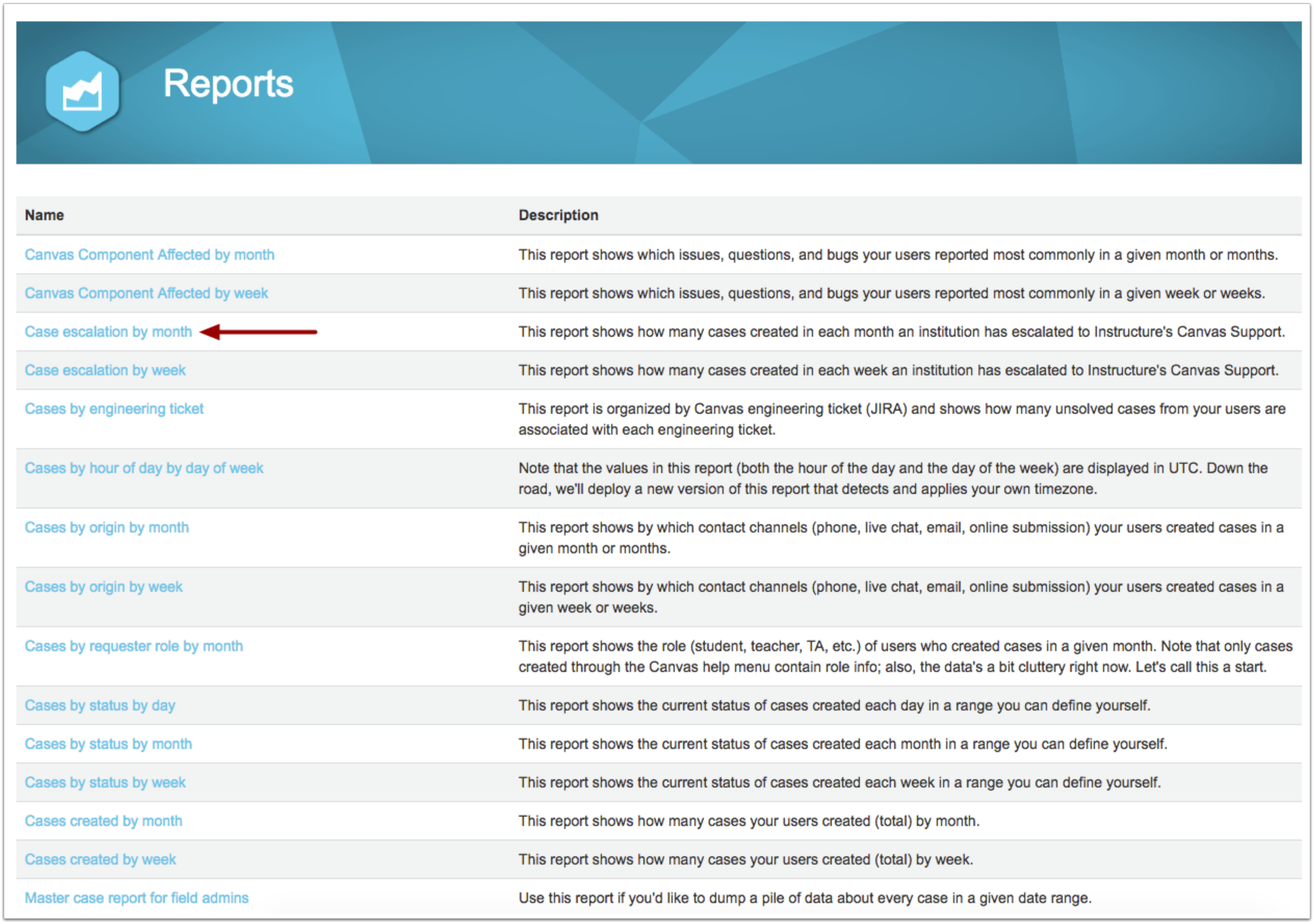
Note: Currently, Field Admins can only view existing reports. If you would like to create a one-time custom report that is not included in the list, contact your Customer Success Manager to learn if this is possible.

Open Reports



From the Service Cloud interface, click the **Reports** link [1] or the **View Reports** button [2].

Select Report

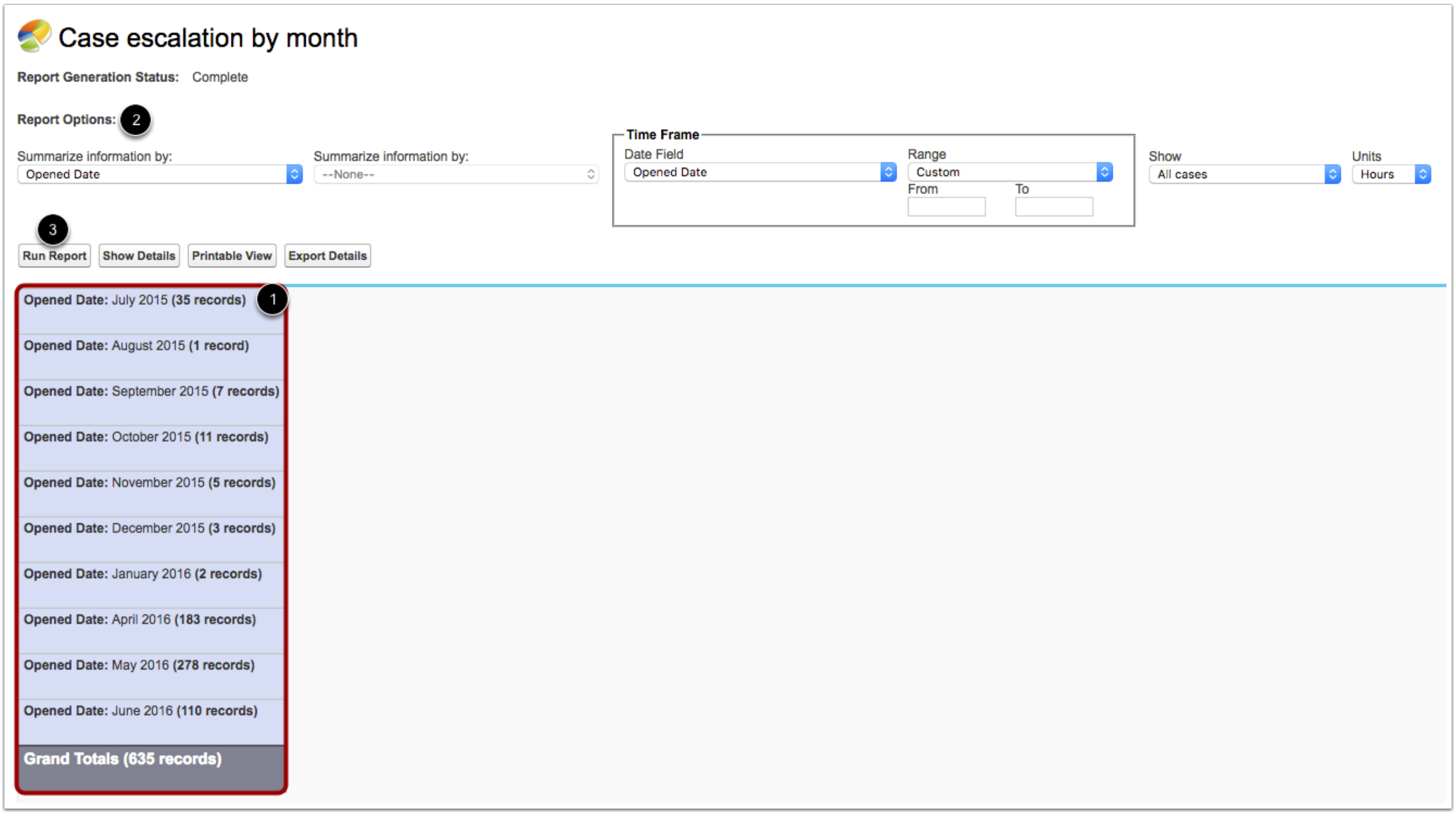


Reports

Name	Description
Canvas Component Affected by month	This report shows which issues, questions, and bugs your users reported most commonly in a given month or months.
Canvas Component Affected by week	This report shows which issues, questions, and bugs your users reported most commonly in a given week or weeks.
Case escalation by month	This report shows how many cases created in each month an institution has escalated to Instructure's Canvas Support.
Case escalation by week	This report shows how many cases created in each week an institution has escalated to Instructure's Canvas Support.
Cases by engineering ticket	This report is organized by Canvas engineering ticket (JIRA) and shows how many unsolved cases from your users are associated with each engineering ticket.
Cases by hour of day by day of week	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.
Cases by origin by month	This report shows by which contact channels (phone, live chat, email, online submission) your users created cases in a given month or months.
Cases by origin by week	This report shows by which contact channels (phone, live chat, email, online submission) your users created cases in a given week or weeks.
Cases by requester role by month	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's a bit cluttery right now. Let's call this a start.
Cases by status by day	This report shows the current status of cases created each day in a range you can define yourself.
Cases by status by month	This report shows the current status of cases created each month in a range you can define yourself.
Cases by status by week	This report shows the current status of cases created each week in a range you can define yourself.
Cases created by month	This report shows how many cases your users created (total) by month.
Cases created by week	This report shows how many cases your users created (total) by week.
Master case report for field admins	Use this report if you'd like to dump a pile of data about every case in a given date range.

Click the name of the report you would like to view.

View Report

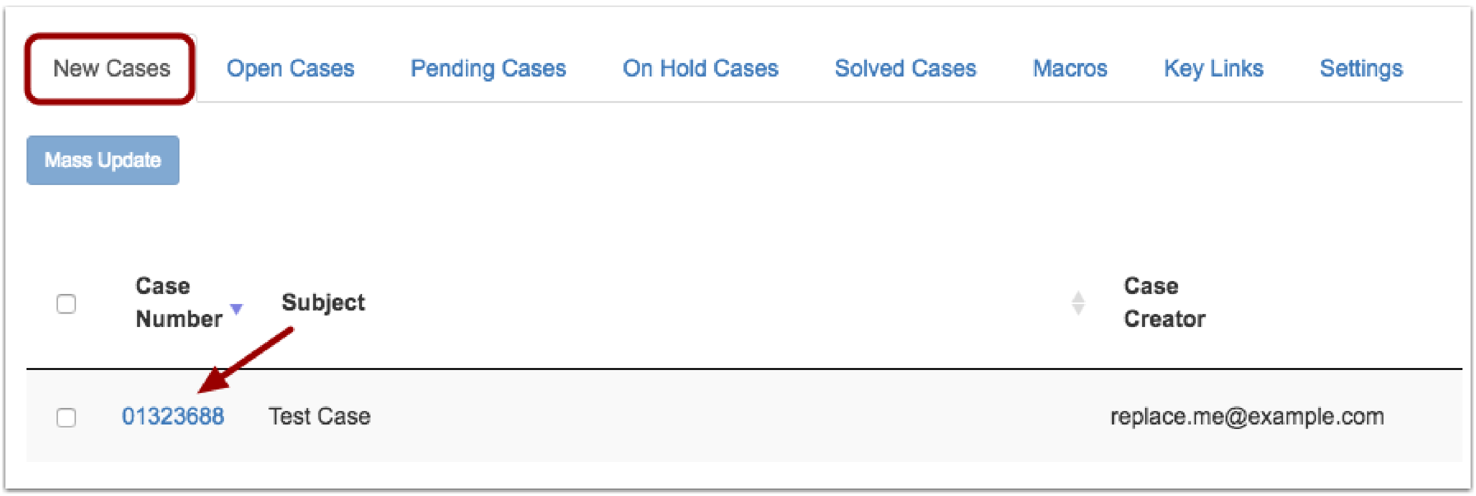


View your selected report information [1]. You can adjust the information visible in the report by changing **Report Options** [2] then clicking the **Run Report** button [3].

How do I view cases in Service Cloud?

As a field admin, you can read a case and view the status in Service Cloud. By default, the dashboard displays a list of new or open cases requiring your attention. You can also search for existing cases.

Open Case

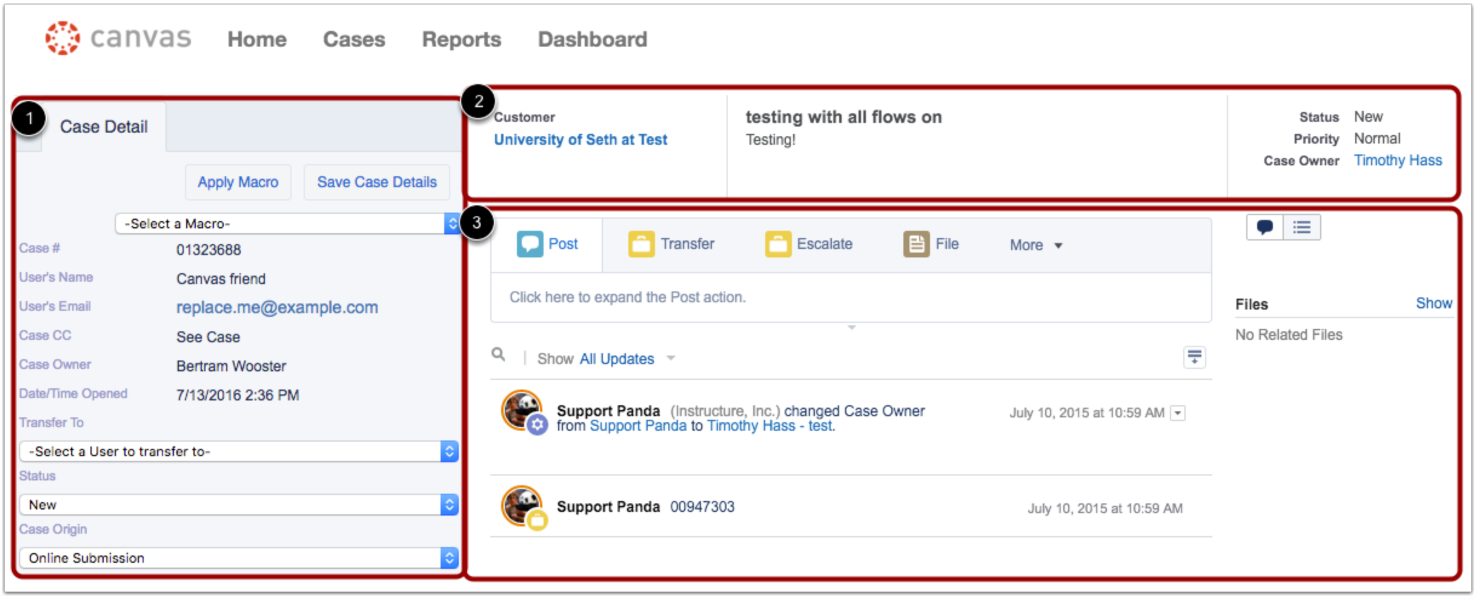


In the Dashboard **New Cases** tab, click a case number.

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].

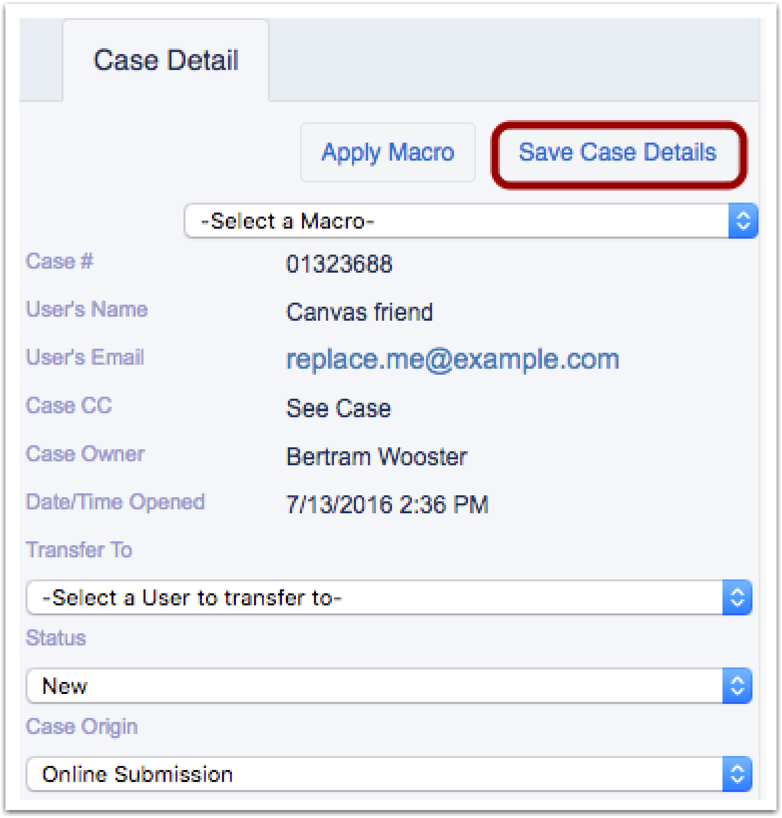
View Case



When you open a case, you will see three main sections:

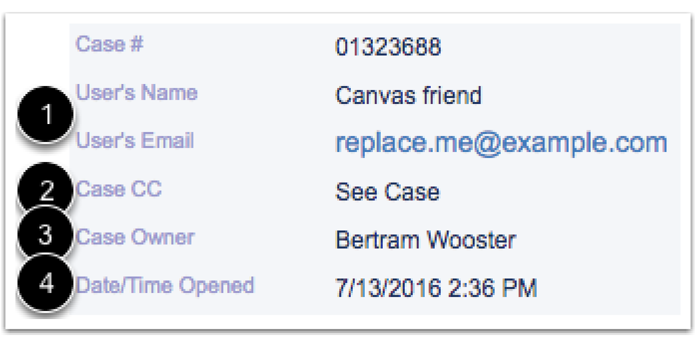
- Metadata Panel (Case Details) [1]
- Summary Panel [2]
- Detail/Feed Panel [3]

View Metadata Panel



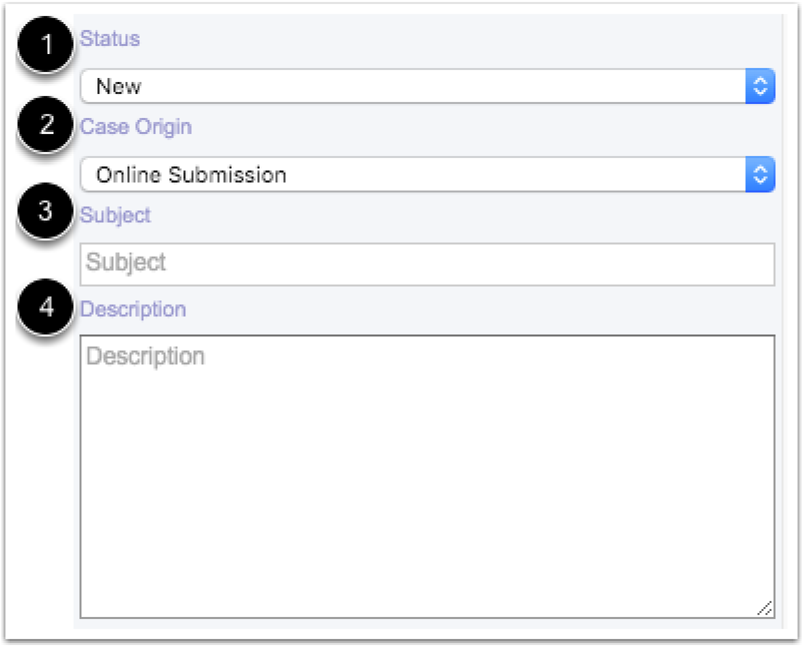
To save the Case Details, click the **Save Case Details** button. However, if you are replying to a user, and you click the Save Case Details button, it will refresh the page and you will lose your post.

View Contact Name, Case CC, Case Owner, and Date/Time Opened



The **User's Name** and **User's Email** lists the name and email of the user who submitted the case [1]. The **Case CC** field will display anyone copied on the case. To add someone, enter the user's email address in the field [2]. Separate multiple email addresses with commas. The **Case Owner** is the user currently assigned the case [3]. To change the case owner, click the Transfer link. The **Date/Time Opened** field shows the date and time the case was opened [4].

View Status, Case Origin, Subject, and Description



The **Status** of your ticket may be **New, Open**, **Pending**, **On-hold**, or **Solved** [1].

- **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.

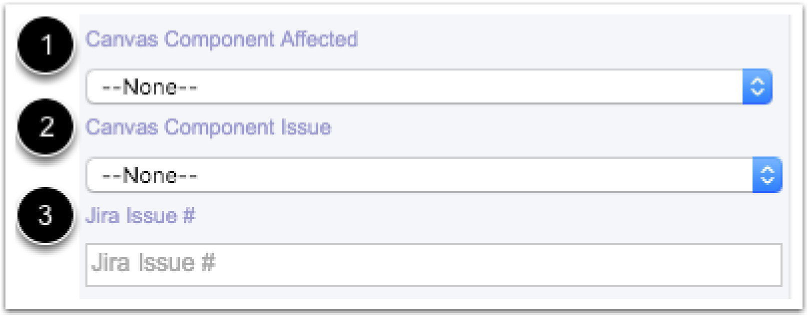
To change the status, select a status from the drop-down menu and click the **Save Case Details** button.

The **Case Origin** should be populated [2]; if not, choosing a case origin from the following list is optional:

- Chat
- Email
- In Person
- Mobile App
- Online Submission
- Phone

The **Subject** field shows what the end-user typed in the subject line [3]. The **Description** shows what the end-user typed in the case [4].

View Canvas Component Affected and Canvas Component Issue



Use **Canvas Component Affected** drop-down menu to select the feature in Canvas where the bug or issue comes from [1]. Being accurate as possible in this field helps Instructure Engineers to recognize pain points.

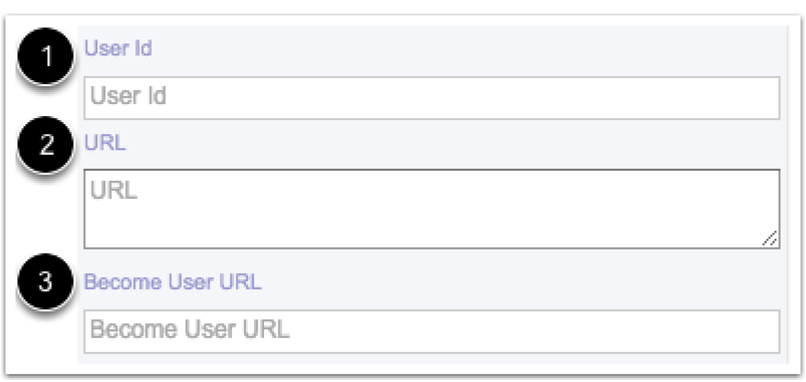
Note: If there are secondary or tertiary level items, please select those items within that feature. If there are not, please select the main feature.

The **Canvas Component Issue** drop-down menu helps track where the issue or bug is coming from [2].

- **How-To Question** indicates that a user has asked for more information from Canvas Guides or a link to video tutorials.
- **Bug** usually refers to something that is happening across multiple users or assignments or a global problem happening in multiple locations/courses. Once a bug is verified, it is reported to Engineering via our internal bug-tracking system.
- **End-User Issue** usually refers to an issue that is affecting a single user or a local computer.
- **Feature Discussion** refers to an issue that needs to be created in the Feature Request.

The **JIRA Issue Number** field is for Canvas Support agents to fill in when a given case is associated with a ticket in our engineering ticketing system. [3] 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 lists the Canvas ID for the ticket submitter [1]. This number should not be confused with an SIS ID as they are separate IDs.

The **URL** field shows where the user was when the online submission ticket was created [2]. 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 shows page where the user submitted the ticket [3]. 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.

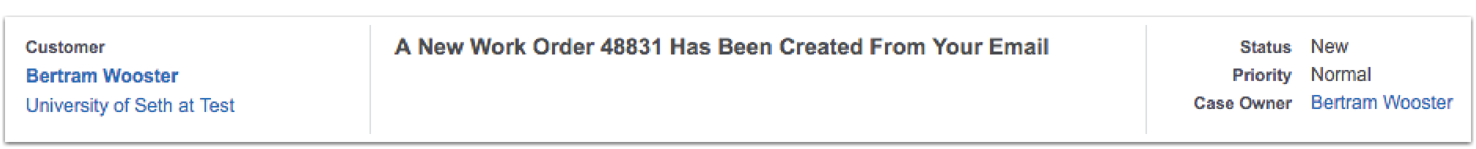
View HTTP Environment

The User Agent String displayed in the **HTTP Environment** field 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 and paste the text in the window for analysis. This will either be populated or not when the case is created. If it is not populated, you do not need to fill it out.

View Stacktrace

The **Stacktrace** field 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. This will either be populated or not when the case is created. If it is not populated, you do not need to fill it out.

View Summary Panel



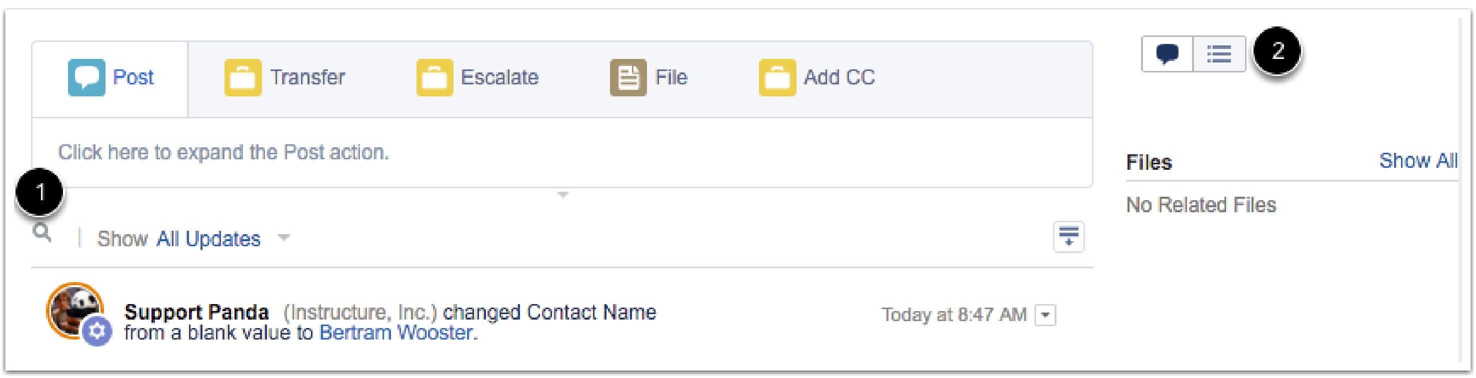
The **Summary Panel** gives you a quick look at some of the information regarding the case.

View Priority

View the priority of the ticket.

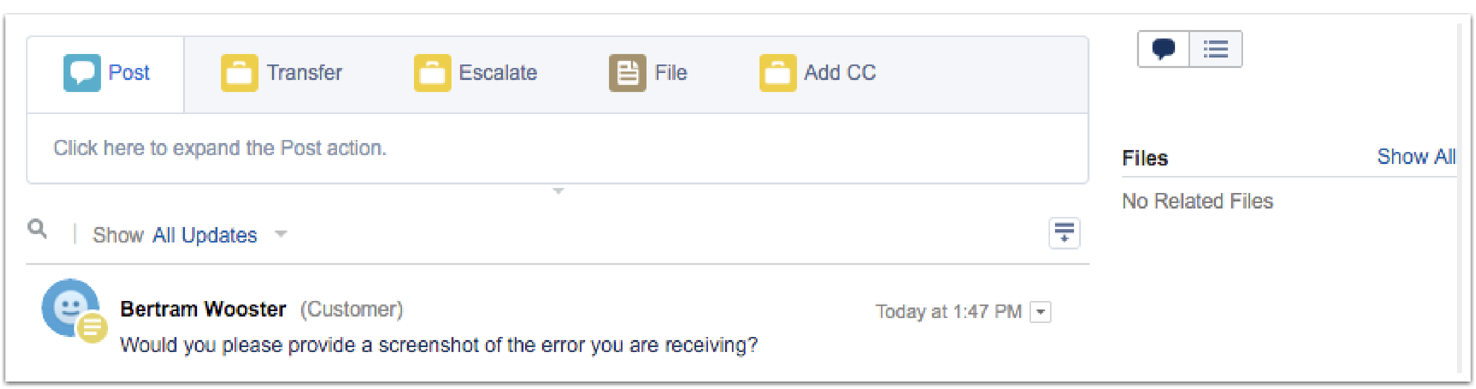
- **Low**: Issues that aren't time sensitive.
- **Normal**: Run of the mill issues, to be handled in order received.
- **High**: Impacts more than one user; is fairly time sensitive.
- **Urgent**: Impacts full departments or institution; extremely time sensitve.

View Feed/Detail Panel



The **Feed** view [1] includes comments, posts about status changes, and posts about other metadata changes. The **Detail** view [2] includes the case metadata in a different format and case action buttons that are duplicated in the left-hand sidebar.

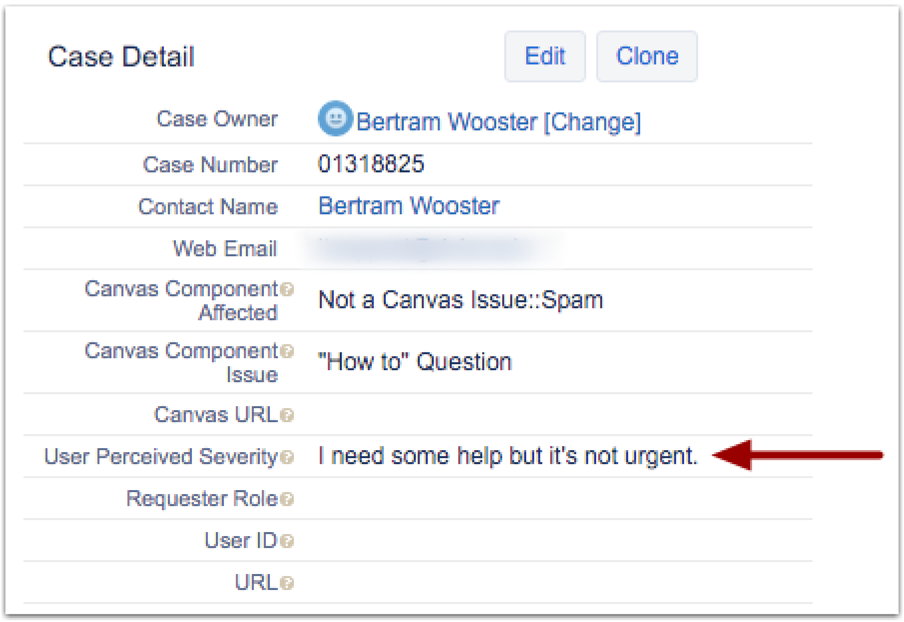
View Comments Section



The **Comments** section includes comments, posts about status changes, and posts about other metadata changes.

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 User Perceived Severity

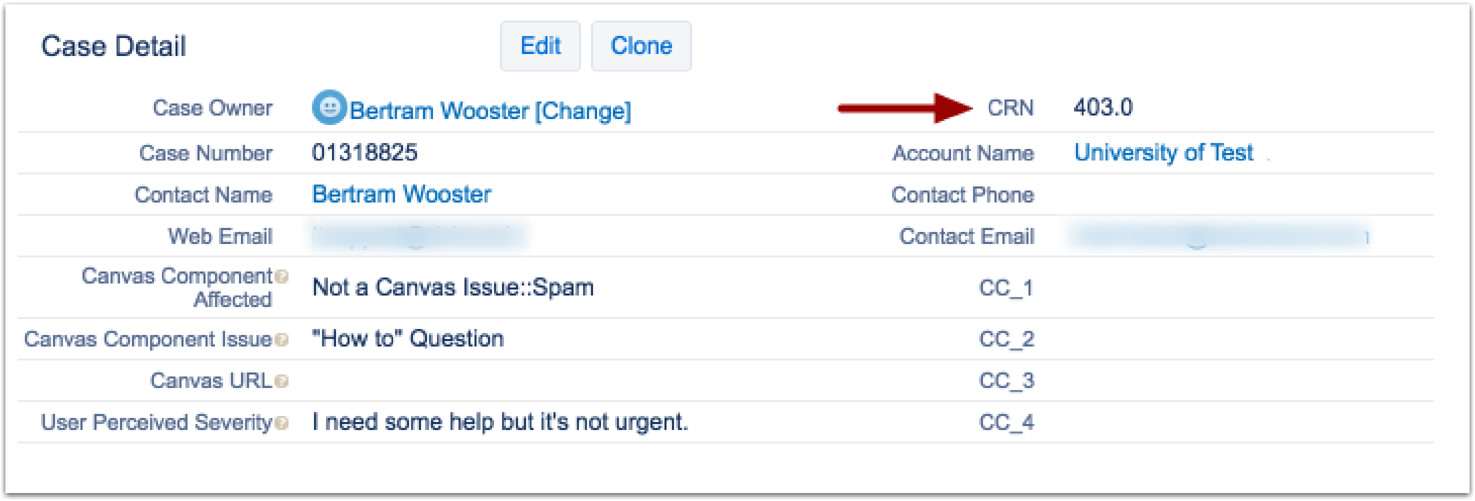


User Perceived Severity is separate from the priority drop-down menu that the agent marks the ticket with. This helps track how urgent the issue is from the perspective of the end user. End users can select:

- Just a casual question, comment, idea, suggestion...
- I need some help but it's not urgent
- Something broken they can work around it to get what I need done
- I can't get things done until I hear back
- Extreme critical emergency

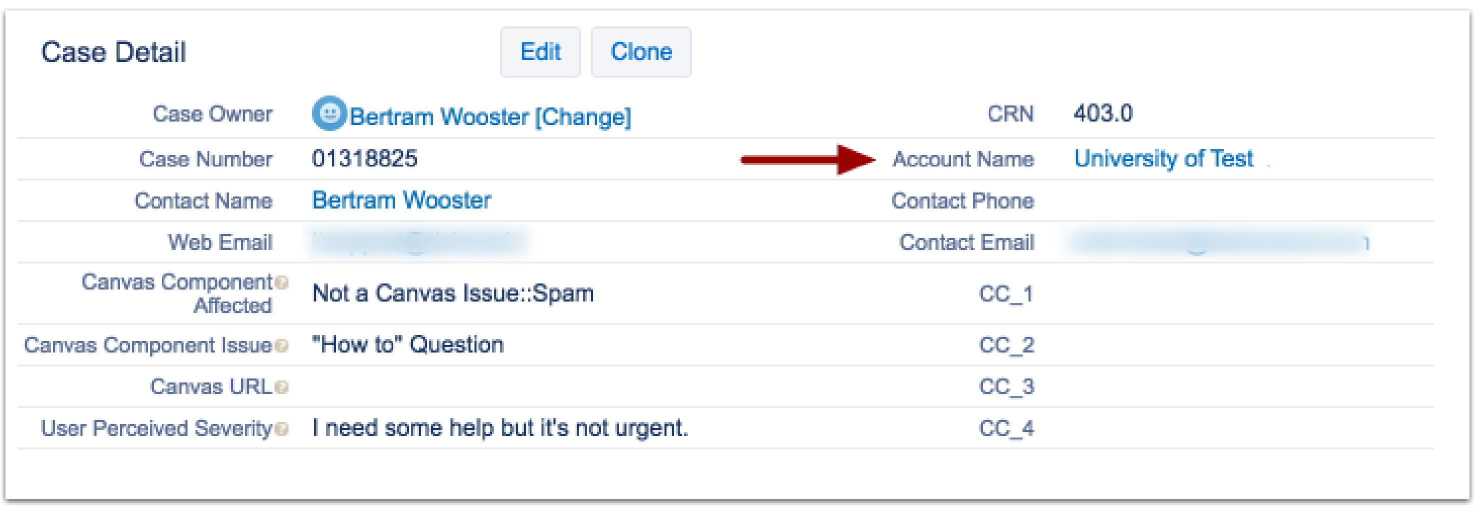
Users should reserve the Extreme critical emergency item for issues and bugs that really are extreme critical emergencies.

View Case Routing Number



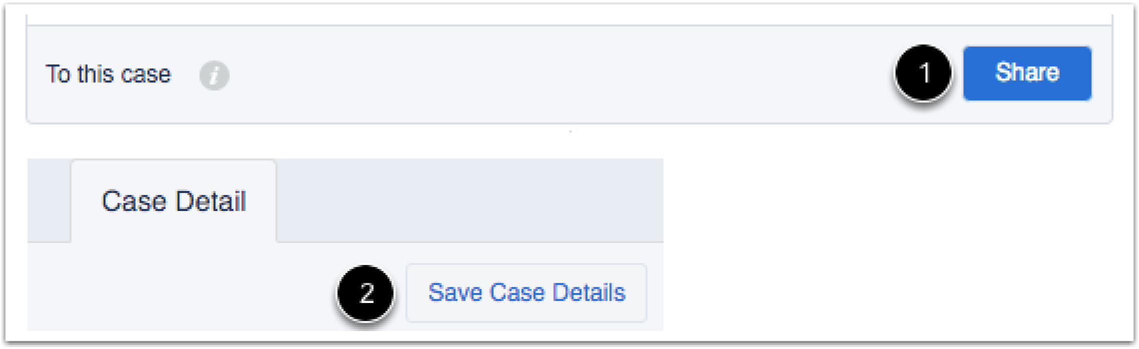
The **Case Routing Number (CRN)** indicates a case's routing history. Learn more about the CRN in the Case Routing Number PDF.

View Account Name



The **Account Name** will have the institution the user is associated with.

Update Case



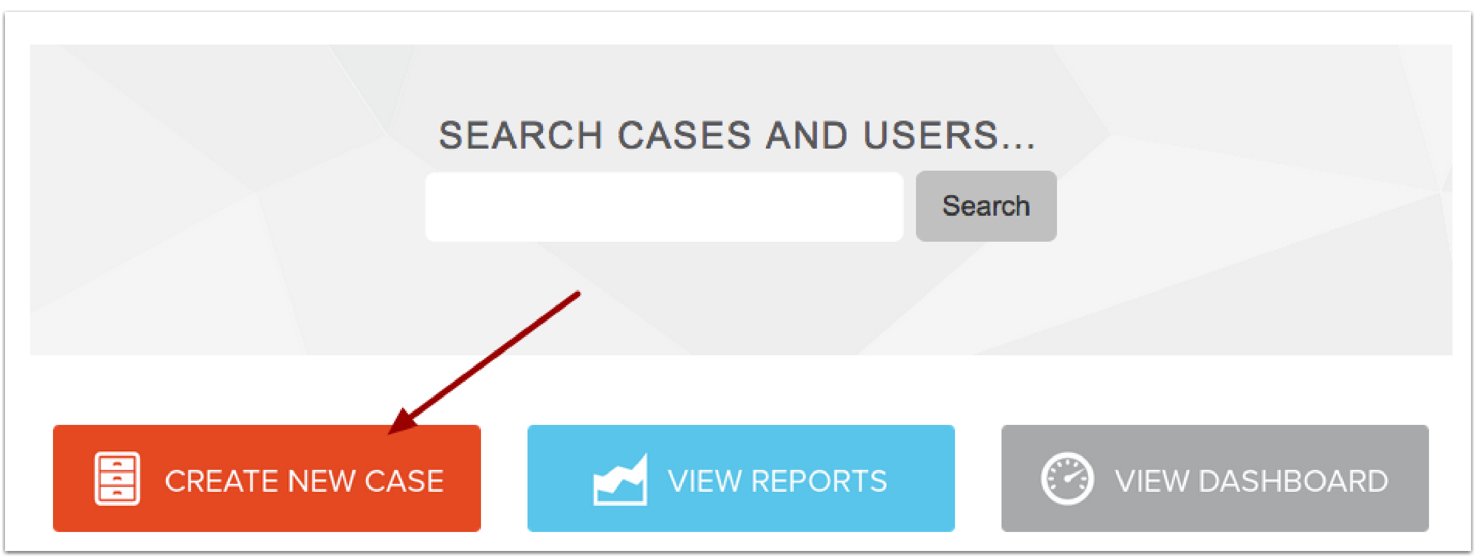
In the Feed view, click the **Share** button [1] to send your reply. In Case Details, update any case details and click the **Save Case Details** button [2].

Note: Merging duplicate cases is not currently supported. We recommend solving the case with a note to saying that you will work the problem in a previously reported case #XXXX.

How do I create a new case in Service Cloud?

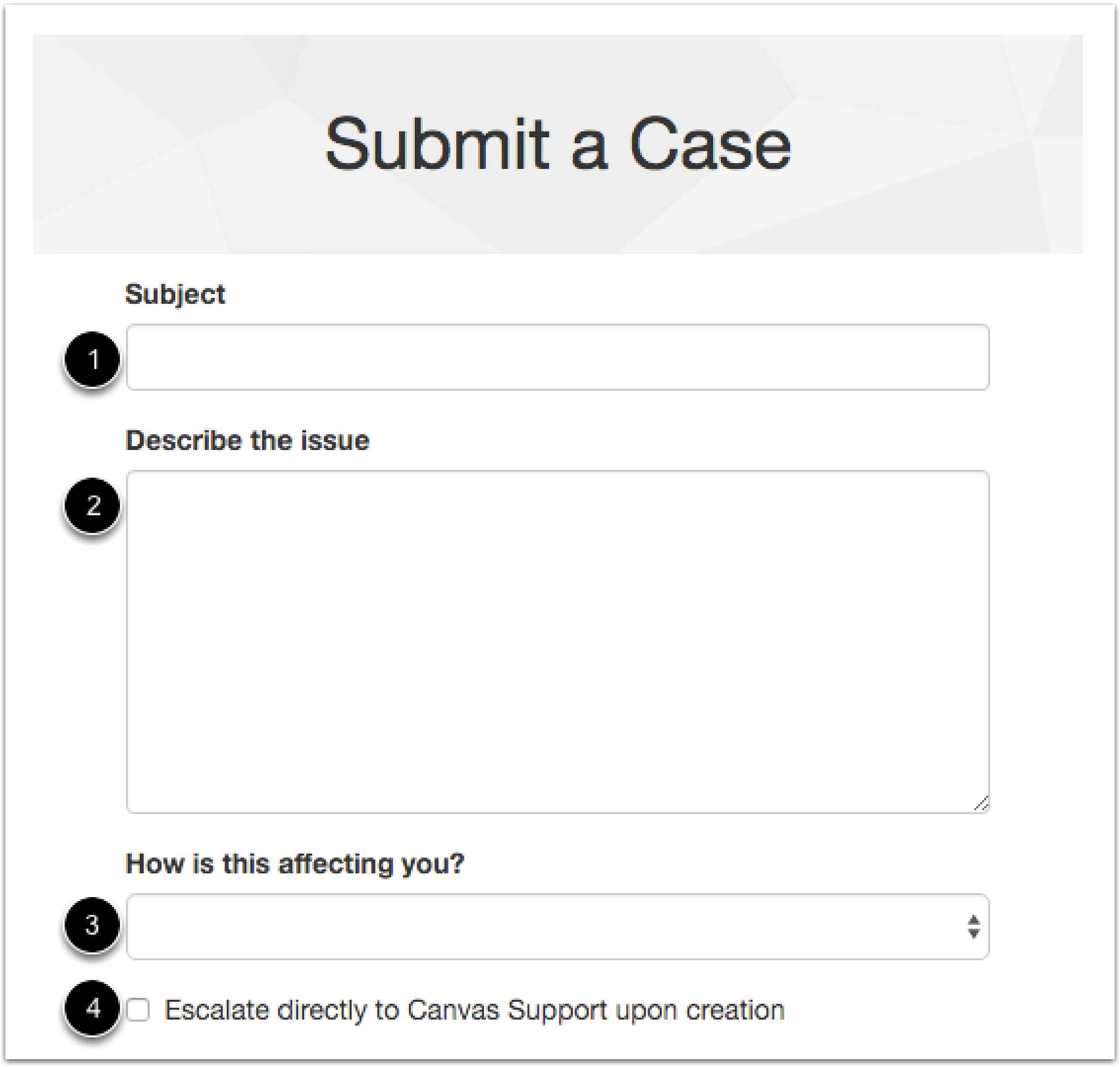
You can create new cases in Service Cloud from the Dashboard.

Create New Case



In the Dashboard, 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 your 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].

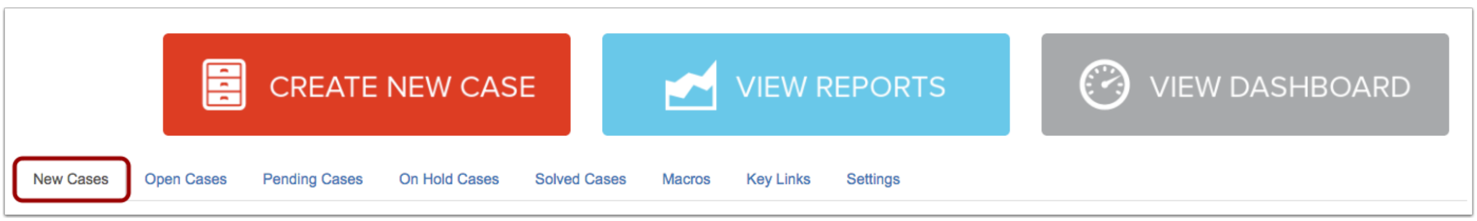
Create Case

Click the **Create Case** button.

How do I transfer a case to another field admin at my institution in Service Cloud?

If you have more than one Service Cloud user at your organization, you can assign cases to other Field Admins.

View Cases

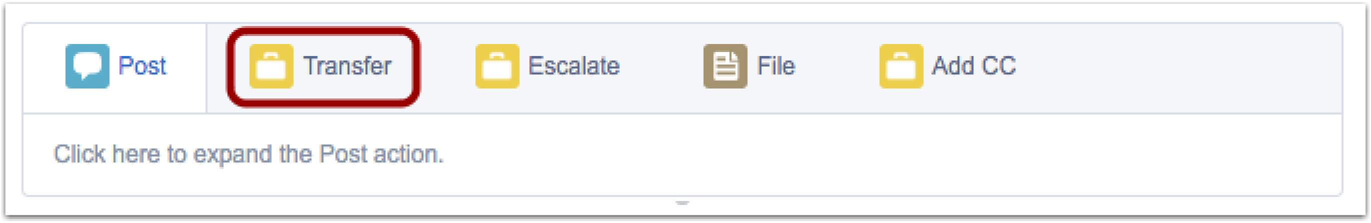


View the **New Cases** tab.

Open Case

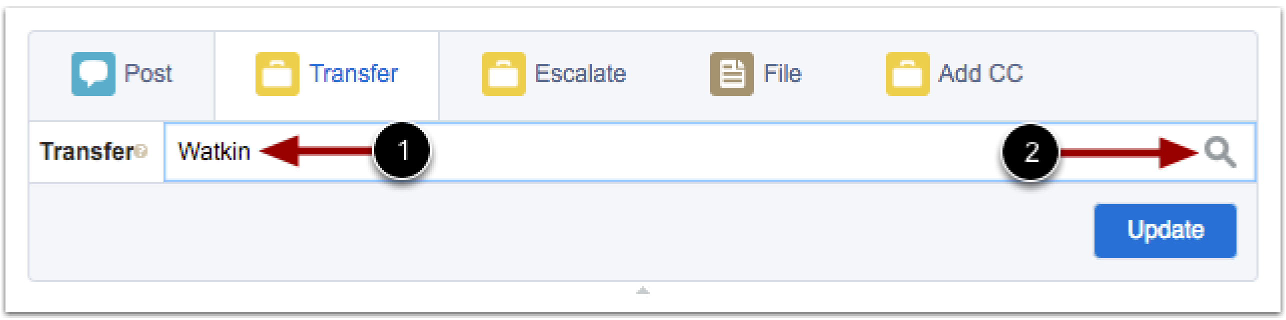
To open a case, click the **Case Number** link.

Transfer Case



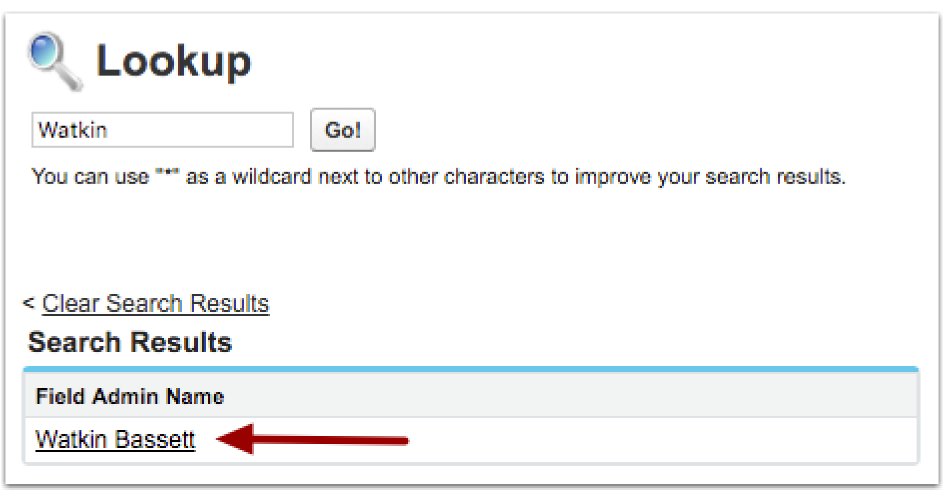
Click the **Transfer** button.

Search for Field Admin



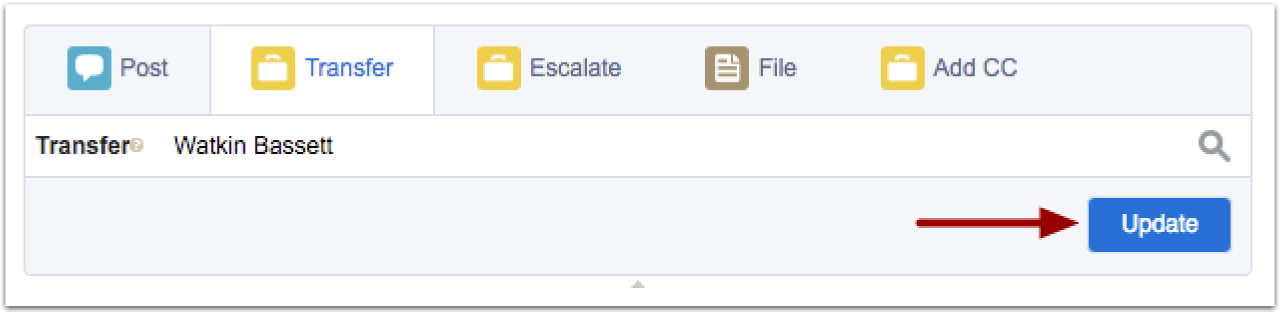
In the **Transfer** field [1], type the first name of the Field Admin you want to receive the case. Click the **Search** icon [2].

Select Owner



In the **Field Admin Name** results, click the name of the field admin.

Update Case

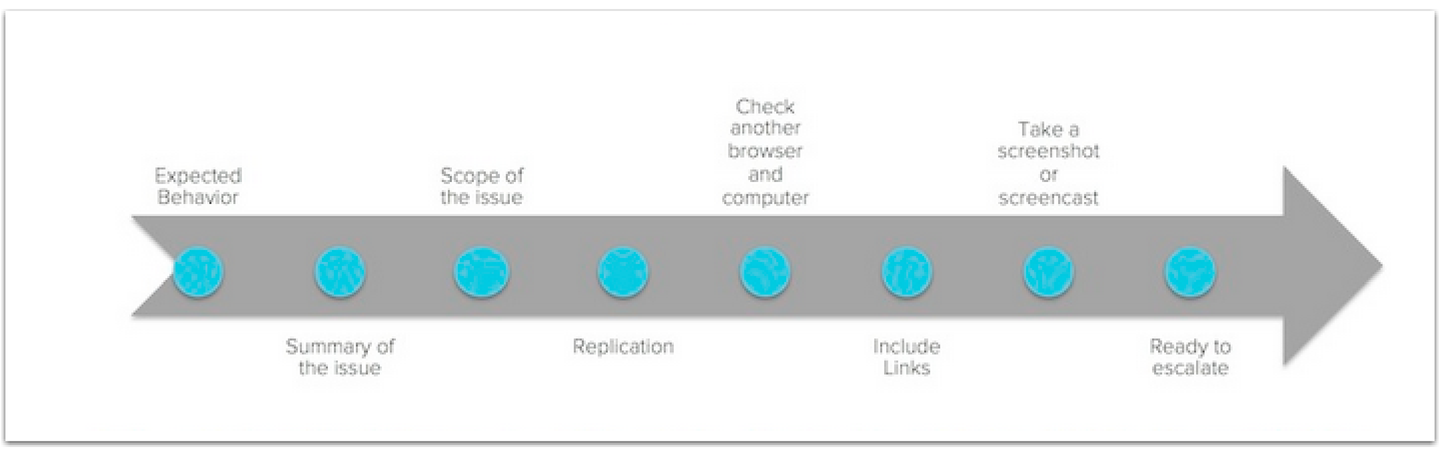


Click the **Update** button.

How do I escalate a case to Canvas Support in Service Cloud?

if necessary, you may be able to escalate a case to the Canvas support team.

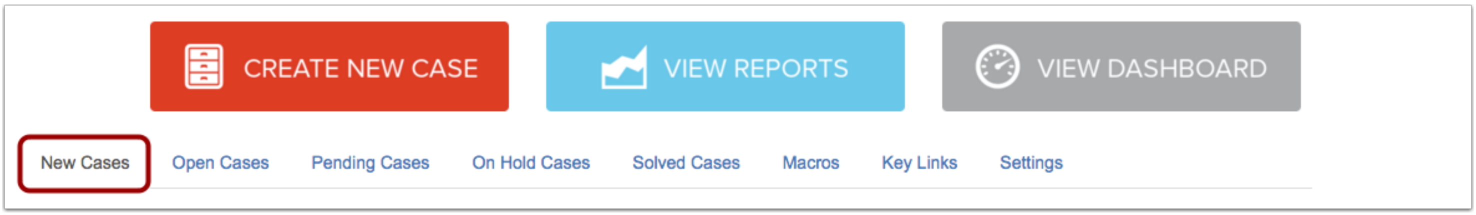
Note: Before escalating a case, try troubleshooting the issue or searching for the answer yourself. Try using the community forums or Canvas Guides.



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

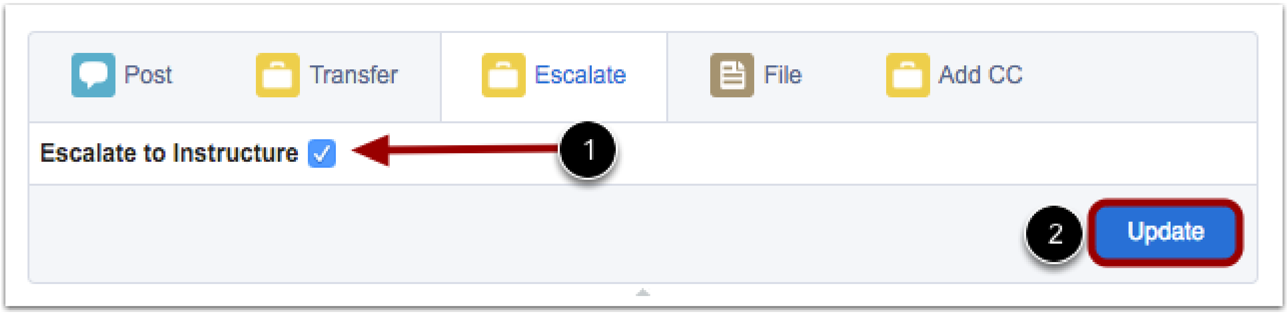
To open a case, click the **Case Number** link.

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

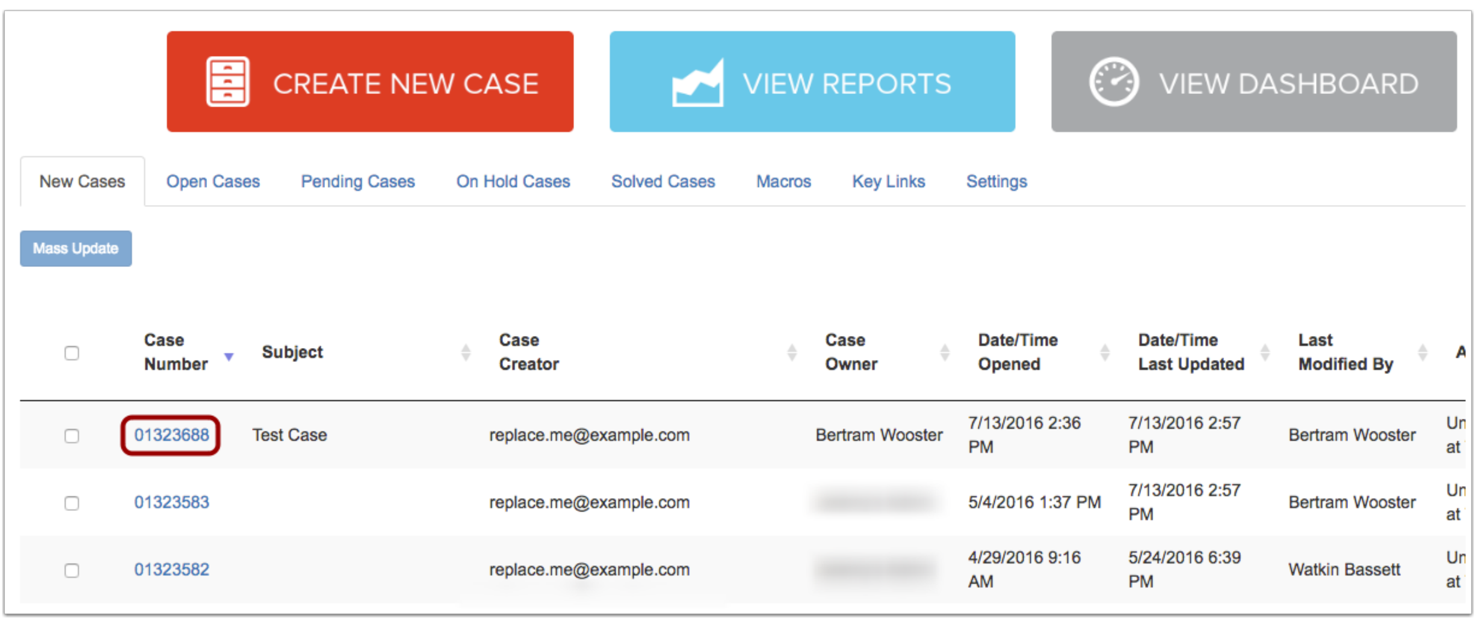


Select the **Escalate to Instructure** checkbox [1] and then click the **Update** button [2].

How do I share a post on a case in Service Cloud?

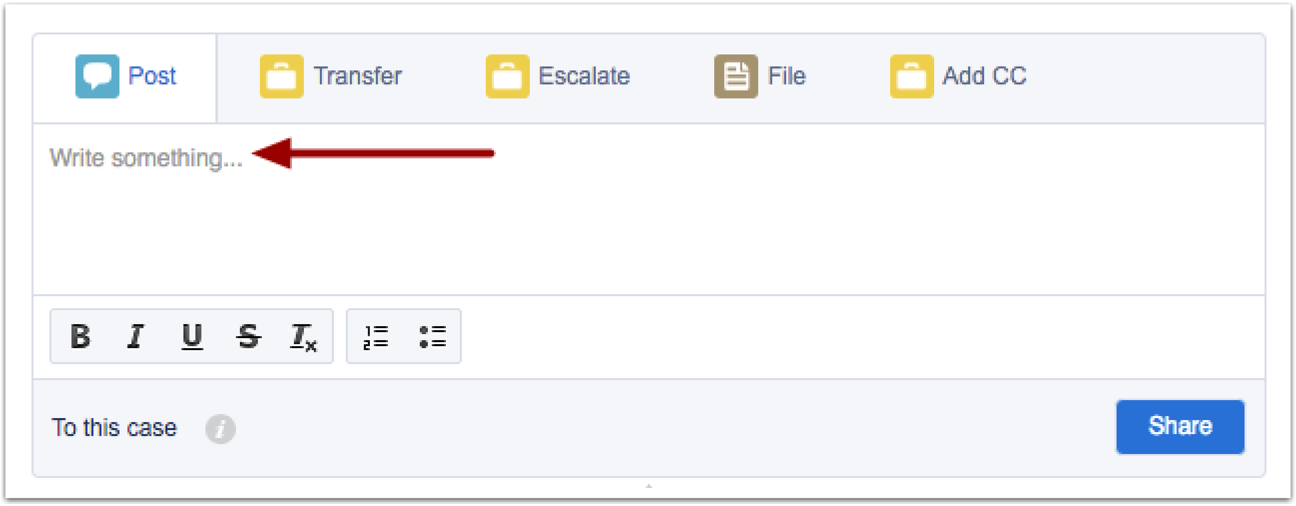
Posts can be made on individual cases to share information on case progress. Your post will appear in the feed of anyone following you or the case where the post was created. Any user with sharing rights will see your post on the case page, search results, and your profile.

Open Case



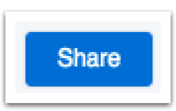
From the Service Cloud interface, click the name of the case where you would like to share your post.

Create Post



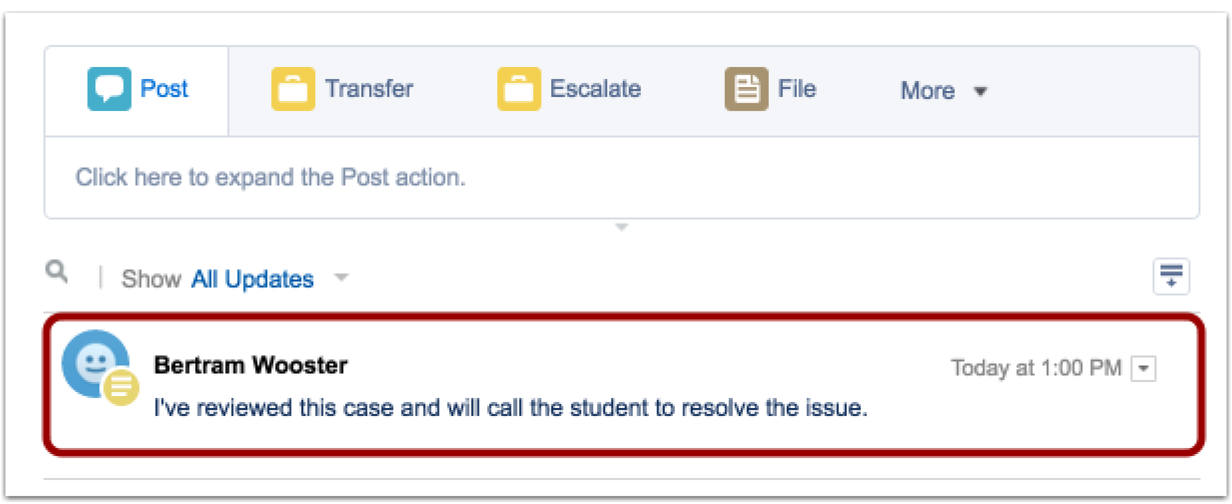
To create a post, type in the text field.

Share Post



To share your post, click the **Share** button.

View Post



View your post.

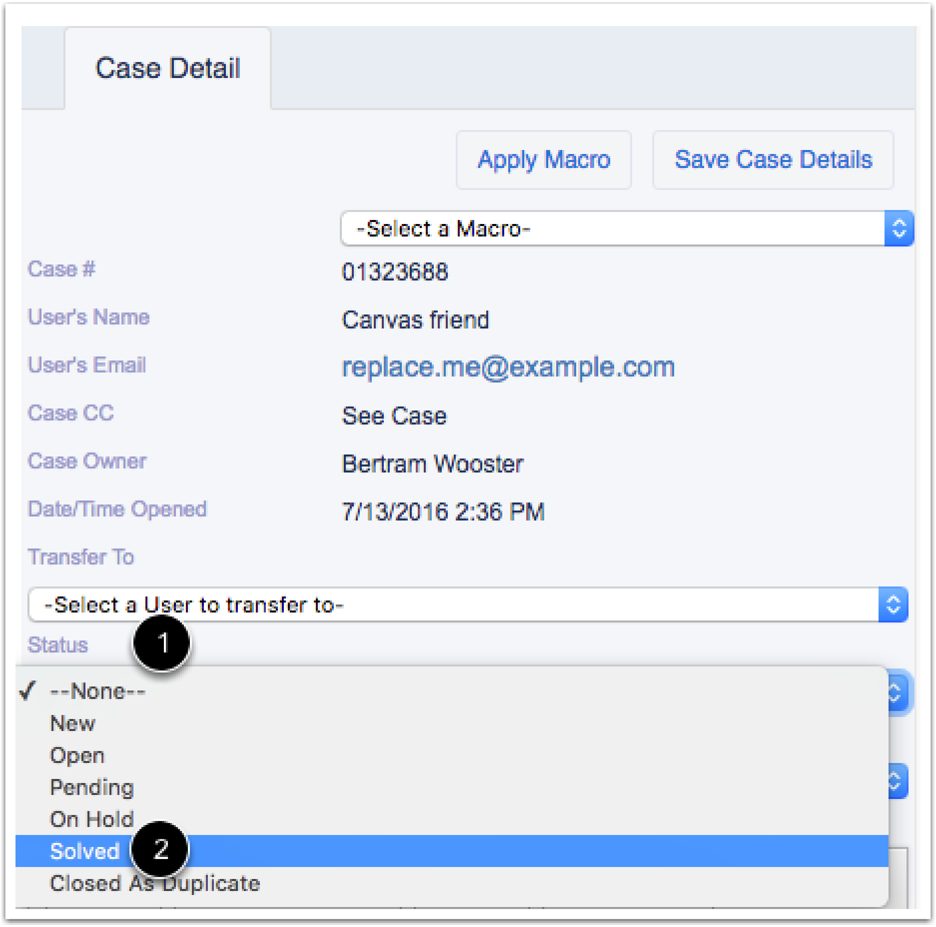
How do I mark a case as solved in Service Cloud?

Once a Service Cloud case has been completed, it can be marked as solved. Once it is marked as solved, it will appear under the Solved Cases tab in the Service Cloud interface.

Open Case

From the Service Cloud interface, 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.

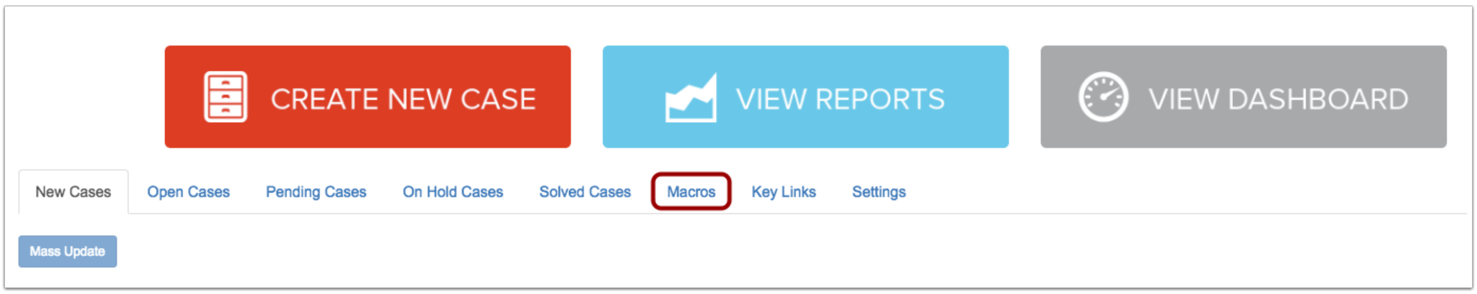
Save Case Details

Click the **Save Case Details** button.

How do I use macros in Service Cloud?

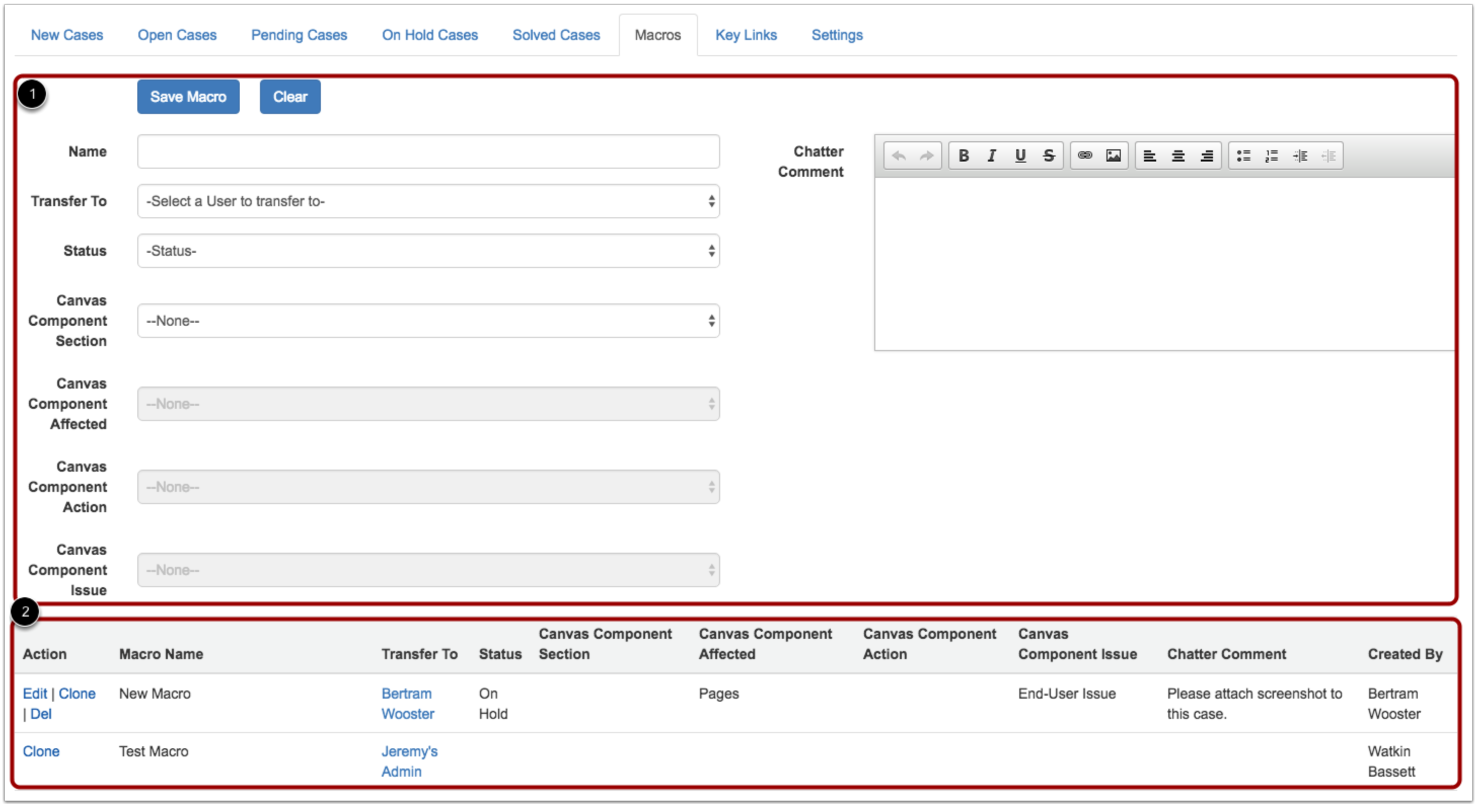
Macros allow users to make a set of changes to a case with the single push of a button. These changes include transferring a case to a specific user, case status, Canvas Component Affected, Canvas Component Issue, and case comments. Macros can be used to make changes to a single case or make mass case updates in Service Cloud. You can create, edit, clone, and delete macros.

Open Macros



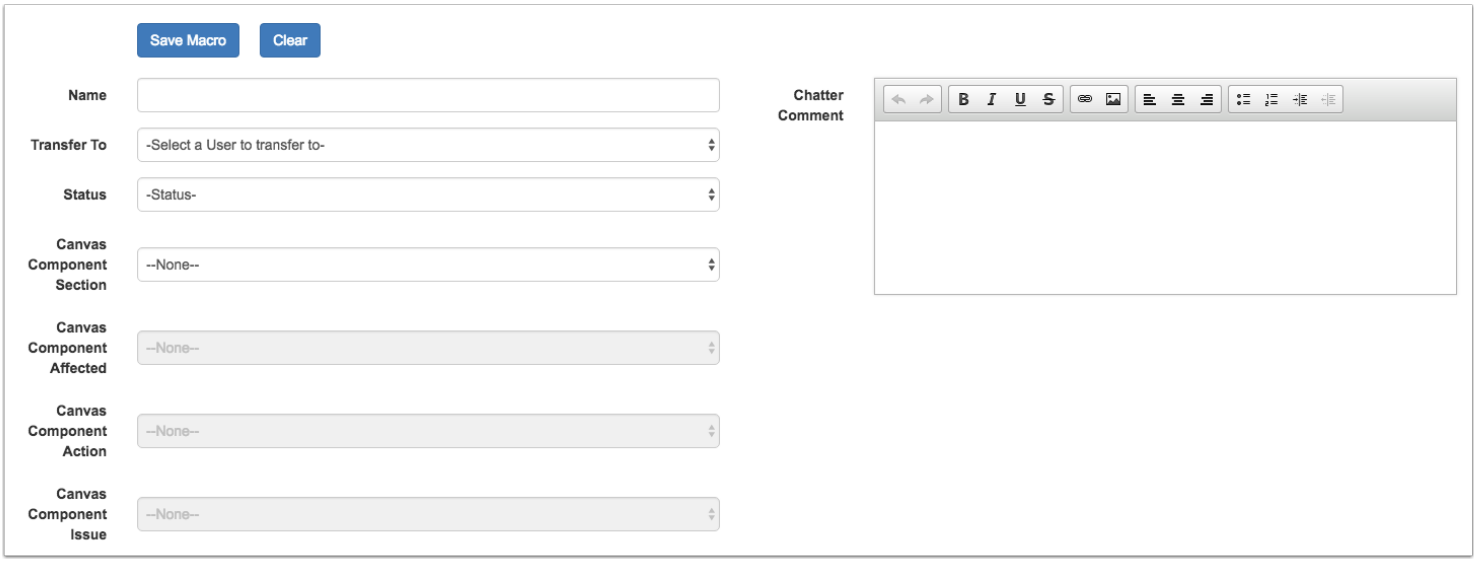
From the Service Cloud interface, click the **Macros** tab.

View Macros



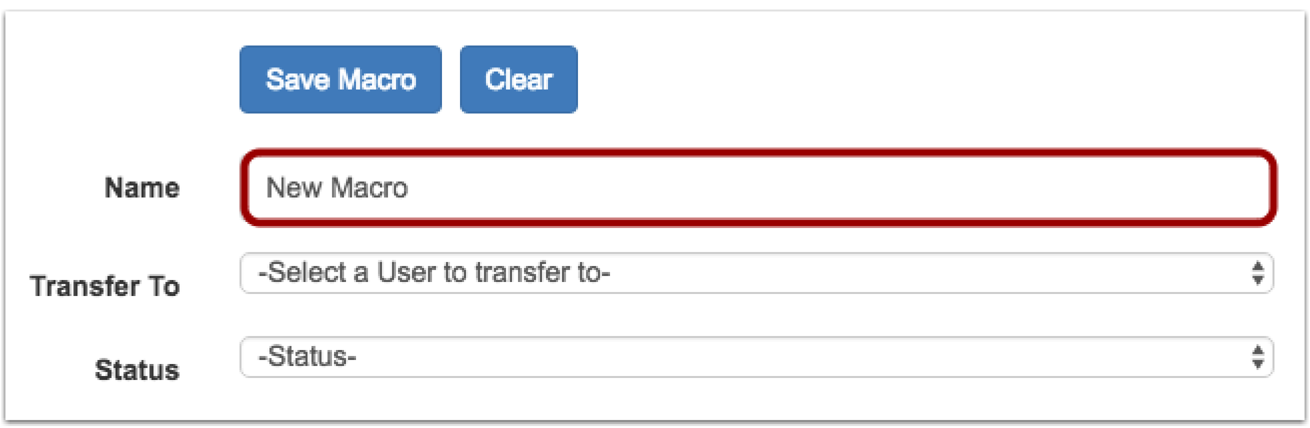
On the Macros page, you can create a new macro [1] or view existing macros [2].

Create Macro



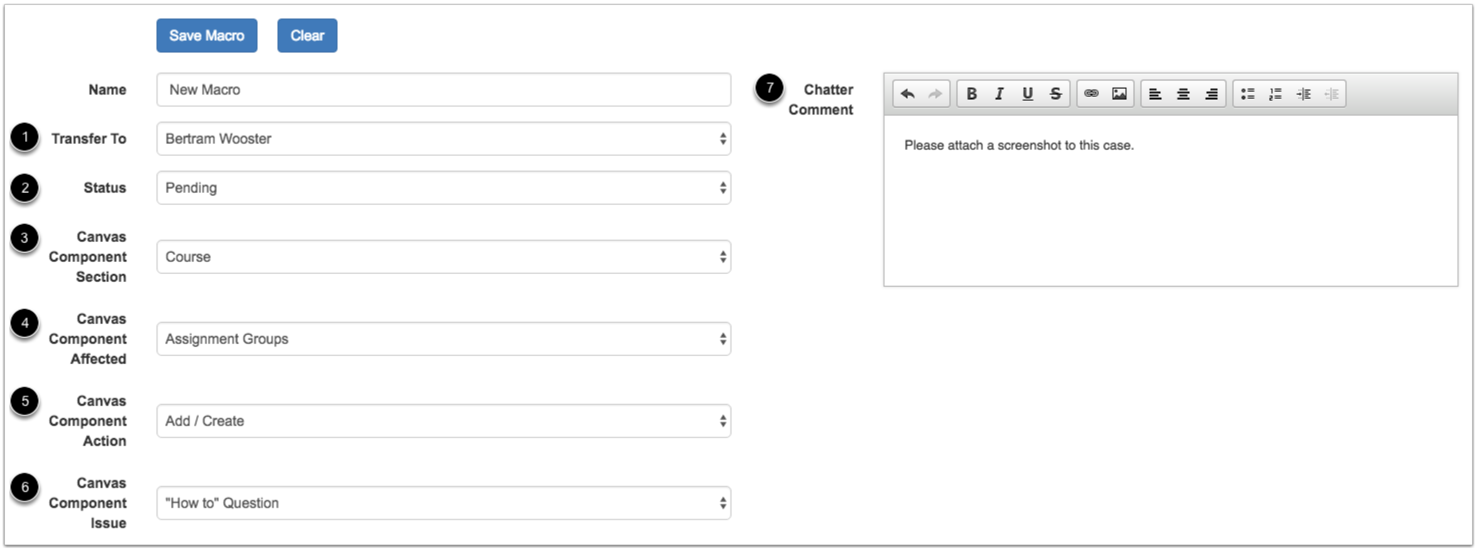
Use the fields at the top of the Macros page to create a new macro.

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:

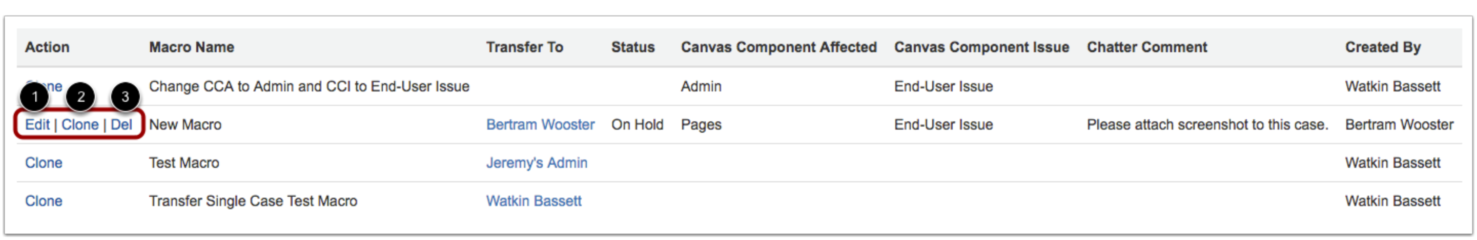
- **Transfer To** [1]**:** Transfer cases to a specific user
- **Status** [2]**:** Set cases to a specific status
- **Canvas Component Section** [3]**:** Set Canvas Component Section for all cases
- **Canvas Component Affected** [4]**:** Set Canvas Component Affected for all cases
- **Canvas Component 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

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



Action	Macro Name	Transfer To	Status	Canvas Component Affected	Canvas Component Issue	Chatter Comment	Created By
Clone	Change CCA to Admin and CCI to End-User Issue			Admin	End-User Issue		Watkin Bassett
Edit | Clone | Del	New Macro	Bertram Wooster	On Hold	Pages	End-User Issue	Please attach screenshot to this case.	Bertram Wooster
Clone	Test Macro	Jeremy's Admin					Watkin Bassett
Clone	Transfer Single Case Test Macro	Watkin Bassett					Watkin Bassett

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].

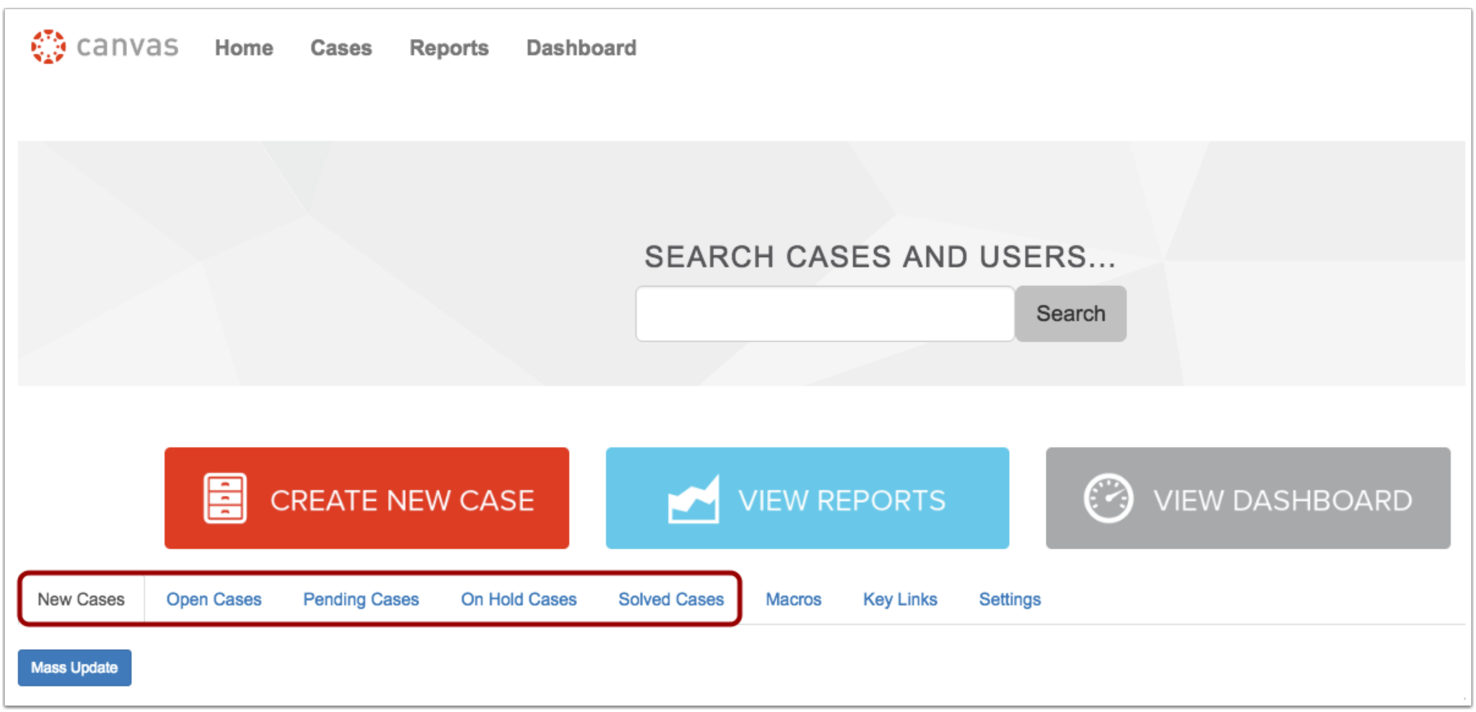
Note: Only the user who create a macro is allowed to edit or delete that macro.

How do I make a mass update to cases in Service Cloud?

The Mass Update button allows you to update up to 200 cases at once in Service Cloud. Through this update, you can assign ownership (via the Transfer To field), set the status and Canvas Component fields, and add comments.

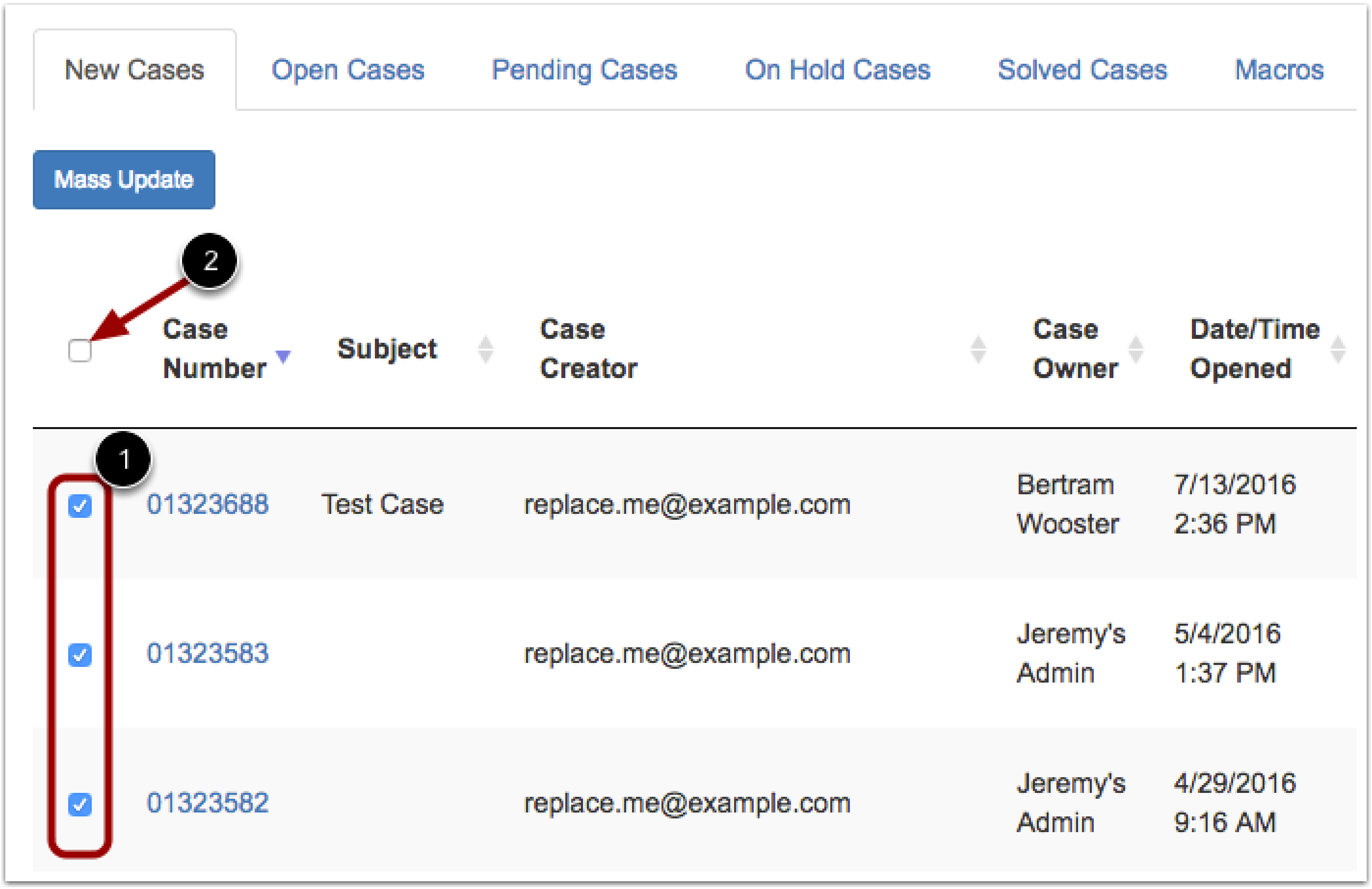
Macros can also be applied to individual cases.

Open Cases Tab



In the Service Cloud interface, open the tab that includes the cases you want to update.

Select Cases

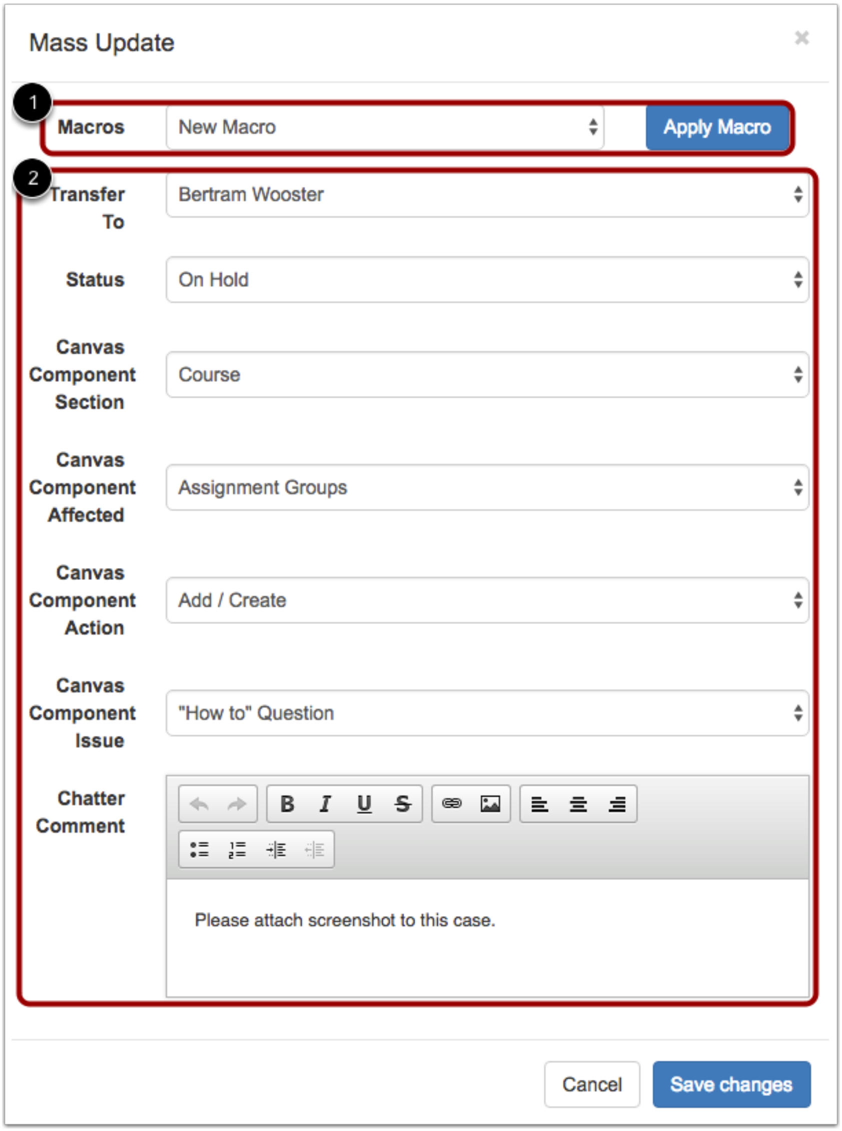


To manually select the cases you would like to update, click the checkbox next to the case number [1]. To select all the cases on the page, click the checkbox above the case numbers [2].

Click Mass Update

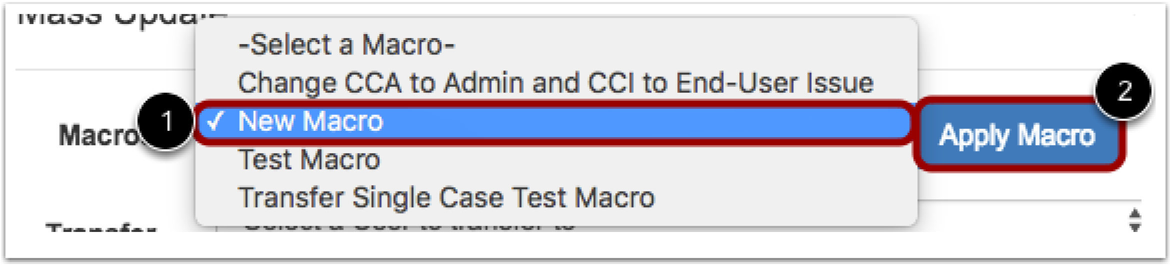
Click the **Mass Update** button.

Select Mass Update Settings



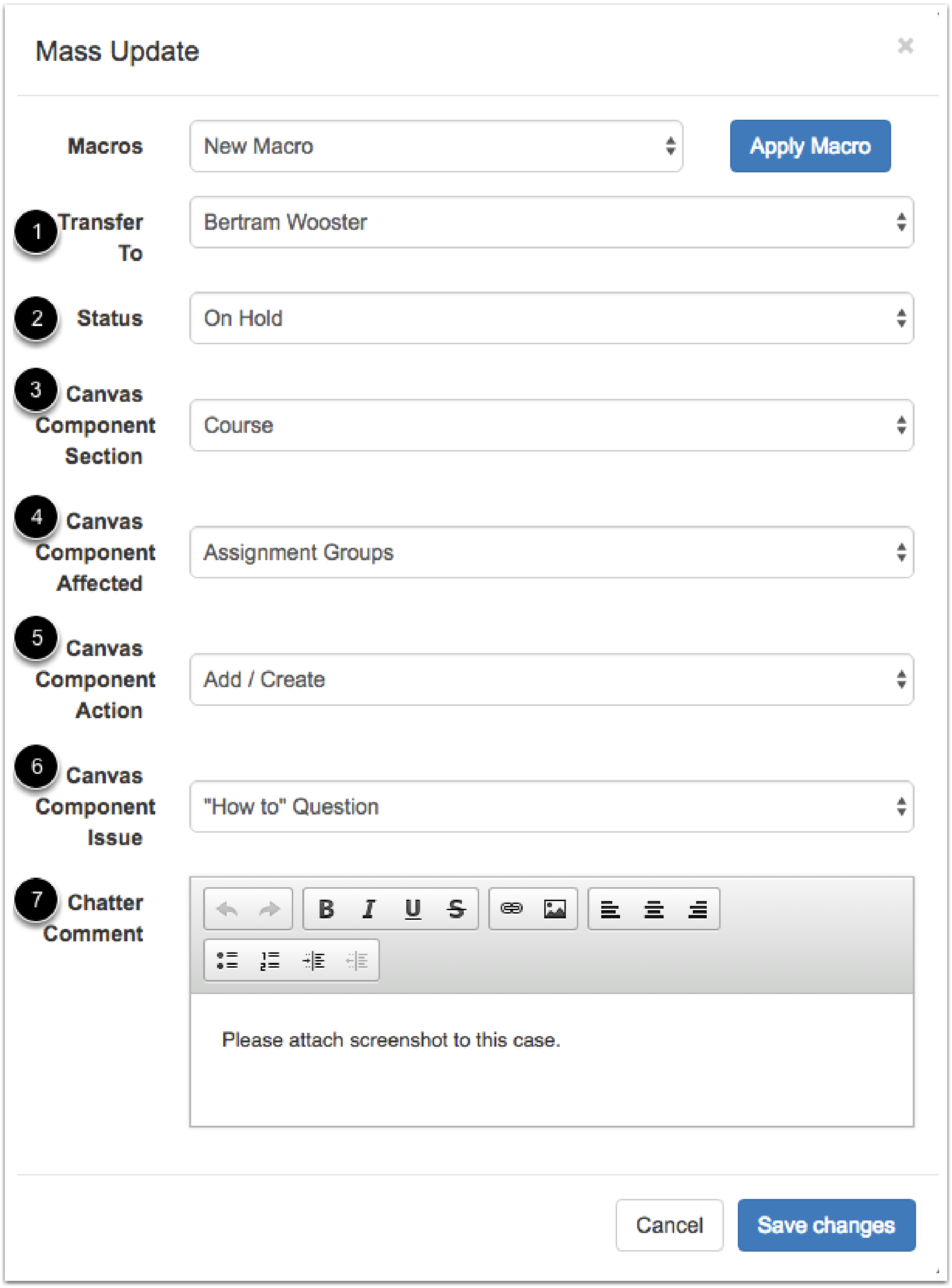
Select the settings for your mass update. You can apply the settings of an existing macro [1] or manually select your settings [2].

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

Note: None of these fields are required, but you must provide a value for at least one to save your changes.

Save Changes

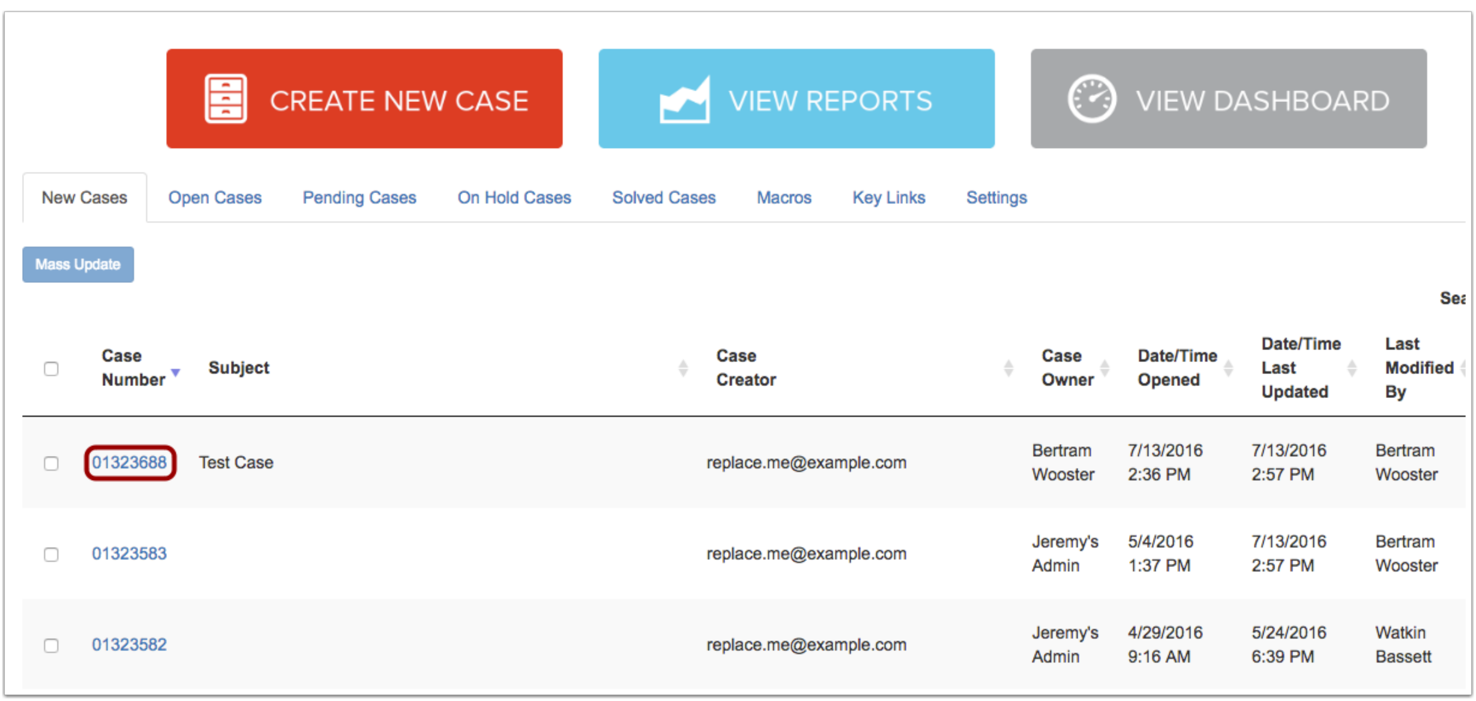
Click the **Save changes** button.

How do I apply a macro to a case in Service Cloud?

Macros allow you to save a set of case settings and apply them to cases in Service Cloud. These changes include transferring a case to a specific user, case status, Canvas Component Affected, Canvas Component Issue, and case comments.

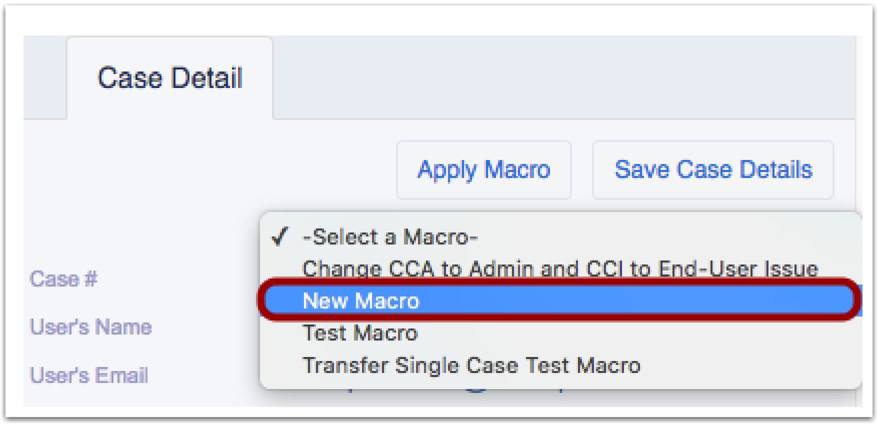
To apply a macro to multiple cases, use the Mass Update feature.

Open Case



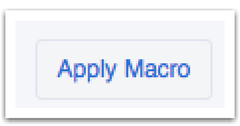
In the Service Cloud interface, open a case by clicking the case number.

Select Macro



Under the Case Detail tab, select the macro you want to use.

Apply Macro



Click the **Apply Macro** button.