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Setting Up SIS

How you choose to setup your institutions terms will play a large part in how your SIS Integration will be used.

Here are some questions to answer to help you get setup...

- Will there be both *active* and *inactive* terms?
- Do all terms need to be accessible from the Site Setup tool?
  - If Instructors/Course Admins are supposed to be able to setup courses/sections for any Term those terms need to be active.
- Should courses in certain terms remain *unpublished* at all times?
  - There may be courses/sections that are not bound to Academic Terms. These are courses that may have Open Enrollment, or just happen to be available year round.

SIS Faq...

1. Courses are Published/Unpublished according to the Term they are assigned to. Dates in the courses.csv file will be ignored.
   a. If a terms `termstarttime` is less than or equal to Today and Today is less than the `termendtime` then all courses associated with the Term will be published when the Course Site Publish job is run. (You can read more about that under SIS Jobs).
2. Terms that have a `termendtime` that is less than Today will not be available in the Site Setup tool during manual course creation.
   a. For a Term to be available it must have an `termendtime` greater than Today. If both the `termstarttime` and the `termendtime` are greater than today that term will also be available.
3. If the **template.course** functionality is being used, the Terms the templates are assigned to must have a `termstarttime` far into the future. Otherwise they will be published when the Course Site Publish job is run and any course created using this template in the future will have the `rsmart.course_site.set` property already set. If it is set the Course Site Publish job will not Publish the site (see *Course Site Removal*).

SIS Jobs

Course Site Publish job

The Course Site Publish job first looks for the property...

```
rsmart.course_site_publish.num_days_before_term_starts
```

The default is 14. It determines the current date and subtracts the `num_days_before_term_starts`. It then looks at all of the Academic Sessions and gets the `termstarttime` and `termendtime`. If the `termstarttime` is less than or equal to Today* and Today is less than the `termendtime` then all courses associated with the Term will be published.

- Note - *The Course Site Publish job sets a publish flag in properties so if a user manually unpublished a site it will not get published again when the Course Site Publish job is rerun*
- Today - *Remember that Today is defined by the number of days associated with the property `rsmart.course_site_publish.num_days_before_term_starts.`*
- Note - the job does not look at the start date in the csv file, it uses the dates associated with the term data.

Property	Expected Outcome when Course Site Publish job is run; default property settings
termterm.1=Summer 1 termstarttime.1=(Two Months Ago) termendtime.1=(Yesterday)	Course will NOT be published
termterm.1=Summer 2 termstarttime.1=(One Month Ago) termendtime.1=(Tomorrow)	Course will be published
termterm.1=Fall 1 termstarttime.1=(14 days from Today) termendtime.1=(3 months from Today)	Course will be published
termterm.1=Fall 2 termstarttime.1=(15 days from Today) termendtime.1=(3 months from Today)	Course will NOT be published

Course Site Removal

The Course Site Removal job first looks for the property...

```
rsmart.course_site_removal.num_days_after_term_ends
```

The default is 14. It determines the current date and subtracts the `num_days_before_term_ends`.
It also looks for the property...

```
rsmart.course_site_removal.action
```

The options are `unpublish` and `remove` with the default being `remove`.
It then looks at all of the Academic Sessions and gets the `termendtime`. If the `termendtime` is greater than or equal to Today* then all courses associated with the Term will be unpublished/removed.

- Today - *Remember that Today is defined by the number of days associated with the property `rsmart.course_site_removal.num_days_after_term_ends.`*
- Note - the job does not look at the end date in the csv file, it uses the dates associated with the term data.

Once a course has been published using the Course Site Publish job the property `rsmart.course_site.set` will be flagged in that course. This property remains set for the life of the course. If the course is ever unpublished with the Course Site Removal job it will not be able to be republish with the Course Site Publish job due to the presence of the `rsmart.course_site.set` property.

Membership Active/Inactive Settings
#turns this feature on, otherwise site is unpublished, but memberships are not affected
inactivateMembers@com.rsmart.course_site_removal.intf.CourseSiteRemovalService.target=true
#a comma separated list of the roles which should be inactivated, without any config this defaults to Student
removeRoles@com.rsmart.course_site_removal.intf.CourseSiteRemovalService.target=Student,Instructor

Property	Expected Outcome when Course Site Removal job is run; default property settings

termterm.1=Summer 1 termstarttime.1=(Two Months Ago) termendtime.1=(Yesterday)	Course will NOT be removed
termterm.1=Summer 2 termstarttime.1=(One Month Ago) termendtime.1=(13 Days Ago)	Course will NOT be removed
termterm.1=Summer 3 termstarttime.1=(One Month Ago) termendtime.1=(14 Days Ago)	Course will be removed

SIS Information Field Definitions

courses.csv Field Definitions

Semester (term_eid)

The semester for which the course is scheduled. This may or may not include the year.

- Value should match the termlistabbr from the properties file
- Max length: 15 (for display reasons), can be up to 99, but is not recommended.
- Sample values: 200704, F07

Site ID

Each site needs a unique site identifier. If you are using an SIS, the site ID can be the unique course ID that resides in the SIS. This ID needs to be unique for all courses across all semesters, so likely will have a semester code as part of it. The site ID here will match the site ID in the CLE Member file.

- Max length: 99
- Sample values: 200703-PSYCH-101-001, 200703-PSYCH-101-002

Start Date

At this time this field is not active and should be left blank.

Name

The name of the course.

- Max length: 99
- Sample value: Introduction to Psychology

Description

A short description of the course. This will be concatenated with the long description and shown on the course's home page.

- Max length: no practical limit. Recommended to be a sentence or 2.

Long Description

The full description of the course. See above for explanation of usage.

- Max length: no practical limit. Recommended to be a paragraph or 2.

Published

This is a numeric value indicting whether the site should be immediately published: 1=publish, 0=do not publish.

End Date

At this time this field is not active and should be left blank.

Site Master Site Id

The site master site id to clone for new course sits. By default, it will be the main master site id declared in local.properties by the property masterSiteId@com.rsmart.customer.integration.processor.cle.CleCourseProcessor. Normally it is left blank.

- Sample values: MasterSite, 9f32a6c5-83bf-42e2-80f0-c3a2a121565c

Add ability to set site contact and email for the site in the course csv file to enable set the column length:

```
columns@com.rsmart.customer.integration.processor.cle.CleCourseProcessor=11
```

The 10th column is the Contact Name, the 11th column is the Contact Email. You could only set the name by setting the columns length to 10 if so desired

members.csv Field Definitions

Warning
Students that should be enrolled in the course should never be taken out of this file. If new students need to be added just add them to the end of the file. Running this file without all enrollments will result in students being dropped from the course.

EID - Enterprise ID

This is the ID that will be typed by a user to log into Sakai. If you are using LDAP or another central directory, the enterprise ID will be the ID from that directory. If you are not using an external directory, the enterprise ID needs to be a unique ID that is associated with each user: for example, a student ID.

- Sample value: U243211201, john.smith@example.com

Site ID

Each site needs a unique site identifier. If you are using an SIS, the site ID can be the unique course ID that resides in the SIS. This ID should be unique for all courses across all semesters, so likely will have a semester code as part of it. The site ID here will match the site ID in the CLE Course file.

- Max length: 99
- Sample values: 200703-PSYCH-101-001, 200703-PSYCH-101-002

Role

A user's role determines that user's permissions on this site, and can have different roles on each site. As an example, a student user may have the role of Teaching Assistant within an English 101 worksite. This same student user may have the role of Student within a Law 501 worksite.

This will come out of the client's student information system and must coincide with role choices listed in the configuration spreadsheet.

- Max length: 99
- Sample values: Student, Instructor, Teaching Assistant

Status (CLE-2458)

When this property is added users status in a site can be controlled using true or false. This corresponds to an active or inactive status in the membership.

```
columns@com.rsmart.customer.integration.processor.cle.CleMembershipProcessor=4
```

- Sample Values: true, false, TRUE, FALSE

Additional considerations...

You can control the mapping of role names in the members.csv file to those within the system. The defaults are shown:

```
studentRole@com.rsmart.customer.integration.processor.cle.CleSectionMembershipProcessor=student
taRole@com.rsmart.customer.integration.processor.cle.CleSectionMembershipProcessor=ta
```

The system will remove any existing memberships for the student or teaching assistants as specified in the following properties, if they do not exist in the members.csv file. This provides a way to remove existing enrollments. This only works on sections for which membership data exists in the members.csv.

```
deleteTeachingAssistants@com.rsmart.customer.integration.processor.cle.CleSectionMembershipProcessor=true
deleteStudents@com.rsmart.customer.integration.processor.cle.CleSectionMembershipProcessor=true
```

users.csv Field Definitions

EID - Enterprise ID

This is the ID that will be typed by a user to log into Sakai. If you are using LDAP or another central directory, the enterprise ID will be the ID from that directory. If you are not using an external directory, the enterprise ID needs to be a unique ID that is associated with each user: for example, a student ID. This ID can change and still refer to the same person.

- Sample values: U243211201, john.smith@example.com
- Max length: 255

Last Name

The user's last name

- Max length: 255

First Name

The user's first name

- Max length: 255

Email

The user's email address

- Max length: 255

Password

The user's password in clear text. When stored in the database, it will be md5 one-way hashed and then base64 encoded.

- Max length: 255

SIS does not update user password even if updateAllowed=true
This will update the password to the value in the csv file if updateAllowed is true as well.

```
updatePassword@com.rsmart.customer.integration.processor.cle.CleUserProcessor=true
```

User Type

A user account type is considered to be a user's global identity in the system and determines the following properties for the user:

1. The user's global role (and associated permissions) within the Sakai Environment
2. The user's MyWorkspace toolset
   When a user logs in to the CLE, their account type controls what their My Workspace looks like and what permissions they have for tools installed there. The account type is independent of a user's role in a group worksite. A user can only have one account type. The default account types are 'student' and 'faculty'. The value in this field must match those in the configuration worksheet (if applicable).

- Max length: 255

Internal ID

This is required, but can be left blank. This can match the EID or Sakai can create a unique ID if it's left blank. If left blank, then modifications to users cannot be performed via the CSV file transfer process. Even if left blank, a comma must follow the preceding user type field. This ID cannot change for a particular user; it must remain constant.

- Max length: 99

CLE-3991 - Allow up to 5 properties to be specified in users.csv file and added as user properties

The property names will be specified in local.properties:

```
columns@com.rsmart.customer.integration.processor.cle.CleUserProcessor=12
user.sis.property.count=5
user.sis.property.1=propertyName1
user.sis.property.2=propertyName2
user.sis.property.3=propertyName3
user.sis.property.4=propertyName4
user.sis.property.5=propertyName5
```

sections.csv Field Definitions

Section ID

Each section needs a unique site identifier. If you are using an SIS, the section ID can be the unique section ID that resides in the SIS. This ID needs to be unique for all courses across all semesters, so likely will have a semester code as part of it. The section ID here will match the site ID in the CLE Section Member file.

- Max length: 99
- Sample values: 200703-PSYCH-101-001, 200703-PSYCH-101-002

Name

The name of the section.

- Max length: 99
- Sample value: **lecture** and **lab**

Category

The type or category of the section.

- Max length: 99.
- Sample values: lab, lecture
    - These values need to match the section descriptions as defined in local.properties.

Site ID

This value references the Site ID for which this section is associated. This value should match one of the Site ID values used in the course file.

Max Enrollments

The maximum number of enrollments allowed for this section

- Must be a valid integer

Additional considerations...

Sections can be removed it they don't show up in the csv file. This can be turned on/off with the following property. This only works for on sites for which section data exists in the csv.

```
deleteSections@com.rsmart.customer.integration.processor.cle.CleSectionProcessor=true
```

section_members.csv Field Definitions

Section ID

Each section needs a unique site identifier. If you are using an SIS, the section ID can be the unique section ID that resides in the SIS. This ID needs to be unique for all courses across all semesters, so likely will have a semester code as part of it. The section ID here will match the site ID in the CLE Section Member file.

- Max length: 99

- Sample values: 200703-PSYCH-101-001, 200703-PSYCH-101-002

User's EID - Enterprise ID

This is the ID that will be typed by a user to log into Sakai. If you are using LDAP or another central directory, the enterprise ID will be the ID from that directory. If you are not using an external directory, the enterprise ID needs to be a unique ID that is associated with each user: for example, a student ID. This ID can change and still refer to the same person.

- Sample values: U243211201, john.smith@example.com
- Max length: 255

Role

A user's role determines that user's permissions within the section.
The CLE supports 2 roles within sections. Typically these are student and teaching assistant. The values for these can be overridden in the local.properties using the following configurations:
studentRole@com.rsmart.customer.integration.processor.cle.CleSectionMembershipProcessor=student
taRole@com.rsmart.customer.integration.processor.cle.CleSectionMembershipProcessor=ta

- Max length: 99
- Sample values: student, ta

Site ID

This value references the Site ID for which this section is associated. This value should match one of the Site ID values used in the course file.

removeusers.csv Field Definitions

EID's

List of user EID's to remove from the system.

The following code must be added to local.properties :

```
#set location of remove file (one userid per line)
filename@com.rsmart.customer.integration.processor.cle.CleRemoveUserProcessor=${sakai.home}/sis/removeusers.csv

# defaults to false, meaning it looks the user up by eid, set this to true to lookup by user id
lookupByUserId@com.rsmart.customer.integration.processor.cle.CleRemoveUserProcessor= false
```