Canvas Admin Guide



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Introduction

Admin Getting Started Resources

Below are some general questions and answers about Canvas, the Admin role, and links to resources to help you become comfortable with Canvas.

Introduction

What is Canvas?

Canvas is a Learning Management System. With its highly integrated learning products, you can build a digital learning environment to meet the unique challenges faced by your institution. To learn more about Canvas terminology and definitions, visit How does Canvas define the terms used to describe its features and functions?

Because Canvas is a web-based system, it doesn't need to be installed on your computer. However, you'll want to make sure that your computer and web browser meet the basic requirements to run Canvas.

What is the Admin role?

In Canvas, the Admin role is the administrator role. Users assigned the Admin role oversee and manage an institution's Canvas account or a Canvas sub-account within an institution. Admin permissions allow users to manage terms, create courses, view and moderate enrollments and content for all courses within an account, and view course and account data. Additionally, Admins can direct communication within an account and its courses. Account-level permissions vary for sub-accounts and from institution to institution. For more information about account-level permissions, view the Canvas Account Permissions resource document.

What is a Customer Success team?

Most Canvas accounts are assigned to a Customer Success team. Your Customer Success team will work with you to establish your account. Review with them your institution's teaching and learning goals as well as your institution's existing structures.

Once your account is established and users at your institution are using Canvas, your Customer Success Manager (CSM) will be your primary point of contact when you have questions, concerns, or comments about Canvas functionality for your institution.

Canvas for Elementary

Canvas for Elementary is a Canvas setting that displays a simplified interface and experience designed for young learners. You need to enable Canvas for Elementary for your account to allow users to use it. For more information, visit the Canvas for Elementary Feature Comparison resource document.

Videos

You can watch videos designed for admins.

Canvas Guides

The Canvas Admin Guide answers a question that relates to using the Canvas interface as an admin. Each article also includes Next and Previous links so you can easily navigate to related content.

Canvas Overview

Canvas has four main areas: Canvas Dashboard, sidebar, Global Navigation menu, and course interface. The video below is an overview of Canvas navigation and account settings for Admins.

Account Structure Resources

Each institution has an organizational structure that supports its specific teaching and learning needs and goals. For example, your institution may be divided into specific schools; each school may be assigned specific grade levels or disciplines; each grade level or discipline may then be divided by department or group.

Before configuring your institution's Canvas account, take the time to answer the following questions about your institution and administrators. Your answers will play an essential role in organizing your Canvas account.

- What is the current organizational structure at my institution?
- How does my institution's organizational structure support our identified teaching and learning needs and goals?
- Do I want to organize my institution's Canvas account using my institution's current organizational structure? If not, how do I want to organize my institution's Canvas account?
- What administrative roles and responsibilities currently exist at my institution?
- Which of these roles need administrative access to Canvas?
- To fulfill their roles in Canvas, what access would (and wouldn't) these individuals need?

Your Canvas account starts with one root account. To establish your account's structure or hierarchy, you will create sub-accounts.

Most institutions organize sub-account structures to mirror their Student Information System (SIS) or registration system. For example, sub-accounts can be created for individual colleges within a university or 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.

- What is the hierarchical structure for Canvas accounts?
- How do I view and manage a sub-account?
- How do I manage themes for an account?

Note: Sub-accounts can be bulk-added using the SIS Import Tool.

Canvas Account Functionality & Integrations

After answering questions about the organization and administration of your institution's Canvas account, consider how Canvas will support teaching and learning at your institution.

- What are your institution's specific teaching needs and goals?
- What role will Canvas play in achieving your institutional vision for teaching and learning?

Canvas includes a variety of standard account integrations. In addition to these integrations, your Customer Success team can configure a variety of other integrations for your account. Learn about available Canvas account integrations. Contact your Customer Success team to enable any of these integrations in your account.

Basic Account Settings

As an admin, the settings you select for your Canvas account will affect how Canvas functions for your users. These settings will also trickle down to the sub-accounts you create in your account.

Some settings, like language and time zone selection, can be modified by individual users and per course, but you'll establish the defaults.

- How do I use account settings?
- How do I set details for an account?

Admin User Roles

Whenever you add a user to Canvas, you must specify their user role. User roles identify what a user can do within Canvas. A role must exist in an account before any user may be added to the role.

By default, Canvas includes one account-level administrative user role. This role comes with unrestricted access to Canvas. However, not every administrative user needs an all-access pass to Canvas. Before adding administrators to your Canvas account, create additional account-level user roles and preselect their Canvas permissions.

View more information about account-level permissions.

- What user roles and permissions are available in Canvas?
- How do I add a new user role in Canvas?
- How do I set permissions for an account-level role?

Account Admins

- How do I add an admin to an account?

SIS Import Tool Overview

The SIS Import Tool allows you to bulk-create a variety of account items using formatted comma-separated value (CSV) files.

Notes:

- The SIS Import Tool is a feature that your CSM must enable for your account.
- All CSV file uploads should be tested in your institution's beta environment before attempting to upload them to your production environment.
- This section outlines a manual process of using the SIS Import Tool. To learn more about using the Canvas API to automatically integrate with your SIS, talk with your CSM and visit the Canvas Guides, review Canvas API documentation, and visit the Canvas Developers Group in the Canvas Community.

Using the SIS Import Tool allows account admins to upload data to their Canvas account quickly. Bulk uploads may be done at any time and in no particular order. Additionally, there are some risks associated with using this tool. For more details about these risks, please view the SIS Imports article.

- What student information system (SIS) integrations are available in Canvas?
- How do I import SIS data to a Canvas account?
- How do I format CSV text files for uploading SIS data into a Canvas account?
- How do I create an automated data integration for an account with Canvas and my SIS?
- How do I practice using the API to import SIS data to a Canvas account?
- What do I need to know about creating a script to automatically import SIS data to a Canvas account?

Learn more about SIS Resources.

Terms Overview

Terms define start and end dates that apply to any course added to that term. For that reason, term dates should be set before adding courses to your account. Terms can be created manually or by using SIS imports**.**

Additionally, terms are used to filter data in admin analytics, analytics hub, and account reports.

- How do I use the Terms page in an account?
- How do I add a new term in an account?
- What should I do at the beginning and end of each term as an admin?
- What should I encourage instructors to do at the beginning and end of each term?

Notes:

- Canvas includes a default term that cannot be removed or renamed.

- Use caution when editing the Term Runs from and User can access dates fields as those fields cannot be left empty when they are edited.
- Instructors and students cannot view the Terms page, so please ensure users in your institution are aware of term dates for your institution publicly.

Not all courses within a term conform to the term dates. Learn more about course dates and section dates.

Grading Periods Overview

Grading periods specify date ranges used for student grade reporting. Student grades are calculated using course assignment scores with due dates that fall within the grading period's start and end date range. Grading period close dates prevent grade modification after a specified date.

Grading periods are created within grading period sets. When creating a grading period set, you can associate it with terms, and any courses within that term automatically inherit the grading periods.

- How do I view grading periods in an account?
- How do I add grading periods in an account?

Grading Schemes Overview

A grading scheme is a set of criteria used to measure student achievement in a course. Without a grading scheme, student scores are not measured against a specific standard.

- What are grading schemes?
- How do I view and manage grading schemes in an account?
- How do I add a grading scheme in an account?
- How do I duplicate a grading scheme in an account?
- How do I edit a grading scheme in an account?
- How do I archive a grading scheme in an account?

Outcomes Overview

Outcomes are statements that describe the knowledge and skills that learners will develop during a course or program. As an admin, you can create outcomes at the account level that instructors may use to measure student progress in a course in your account.

- How do I use the outcomes page in an account?
- How do I create an outcome for an account?
- How do I create outcome groups for an account?
- How do I import outcomes for an account?
- How do I use the outcomes page in an account in Improved Outcomes Management?

- How do I create an outcome for an account in Improved Outcomes Management?
- How do I create outcome groups for an account in Improved Outcomes Management?

Rubrics Overview

A rubric is an assessment tool for communicating expectations and measuring student mastery of a course assignment or assessment. Rubrics are typically comprised of rows and columns. Assessed criteria are defined in rows. Columns are used to define levels of performance for each criterion.

- How do I manage rubrics in an account?
- How do I add a rubric in an account?
- How do I align an outcome with a rubric in an account?
- How do I customize learning mastery ratings for an account?

Note: If enabled, the Rubric Enhancements feature option provides visual and functional enhancements to rubrics across Canvas.

Question Bank Overview

Question banks are classic quiz question repositories. When creating a classic quiz, users can access question bank questions, making it easier to offer the same classic quiz questions to students in different courses.

- How do I manage question banks in an account?
- How do I create a question bank in an account?

Item Bank Overview

Item banks are New Quizzes question repositories. You can add content to an item bank by importing a QTI file or manually creating questions.

Once an item bank is created, it can be shared with an entire institution, sub-accounts, or with individual users.

- How do I create a New Quizzes item bank for an account?
- How do I manage New Quizzes item banks shared with an account?
- How do I share a New Quizzes item bank from a course with an account?

Custom Branding Overview

The Canvas Theme Editor allows you to customize the display colors for text, buttons, and links using hex codes. You can also upload custom images and watermarks to display in your Canvas instance.

By default, the Theme Editor is only enabled in an institution's root account and all sub-accounts adopt the root account theme. However, the tool can be enabled in sub-accounts, allowing for sub-account theme customization. Any design element not changed in a sub-account theme inherits the account-level design.

Additionally, the Theme Editor supports custom cascading style sheets (CSS) and JavaScript (JS) uploads. Your CSM can enable this option in your account. Before using this option in your account, learn about CSS/JS restrictions in Canvas.

- How do I manage themes for an account?
- How do I create a theme for an account using the Theme Editor?
- How do I upload custom JavaScript and CSS files to an account?

External Apps (LTI) Overview

Canvas supports the Learning Tool Interoperability (LTI) standard for third-party tools. This means you can integrate a variety of existing teaching tools to work within Canvas via the EduApp Center. You can enable these tools in your account and they will be available for use in courses in your account.

- How do I use the Canvas App Center in an account?
- How do I manage an Edu App Center allow list in Canvas?
- How do I configure an LTI key for an account?
- How do I configure an external app for an account using a URL?

Course-Level User Roles and Permissions Overview

After adding admins to your account and establishing your account basics, you are ready to create course-level user roles. A user role defines what a user can do and establishes their permissions within Canvas. When you add a user to Canvas, you must specify their user role. Therefore, user roles with defined permissions must exist in an account before a user can be added.

By default, Canvas includes five course-level user roles: student, teacher (instructor), TA, designer, and observer. Each role has preset permissions that determine its level of access to courses and course materials in Canvas. For example, students and parent observers typically do not create quizzes in a course, but teachers (instructors), TAs, and course designers likely do. Therefore, some user roles have restricted access to course permissions based on their typical role and responsibilities at an institution. Your institution may also require the need for other course-level users with varying access. You can create additional course-level user roles and preselect their Canvas permissions.

View more information about course-level permissions.

Courses Overview

The most efficient way to add users to your account is to enroll them directly in a course. You can add courses to your account using the SIS Import tool or create courses manually.

- How do I use the Courses page in an account?
- How do I add a course in an account as an admin?

Course Enrollments

All courses in your account are displayed on the Courses page. You can enroll (or add) new and existing users in a course. Canvas can identify new user information when you create course enrollments, and new users will automatically be added to your account when they are enrolled in a course.

- What user enrollment and registration options are available in Canvas?
- How do I use the People page in an account?
- How do I create and add users to an account?
- How do I edit a user's name, time zone, or email in an account?
- How do I manage a user's login information in an account?
- How do I act as another user in an account?
- How do I view the enrollments for a user in an account?
- How do I enable open registration in an account and allow instructors to add users to a course without Canvas accounts?
- How do I enable self-enrollment in an account and allow students to self-enroll in a course?

Canvas Feature Options

Canvas is continually creating new features to improve your experience. The majority of improvements are made available as part of the regular release cycle. However, some features may change the workflow for common activities in Canvas during your current term. You can learn about these features at your own pace and manage Canvas features from your Account Settings.

Feature options allow you to choose if and when you want to enable a new feature for your institution. Most institutions pilot the feature within their institution and then enable it for the entire institution between terms.

Additional Resources

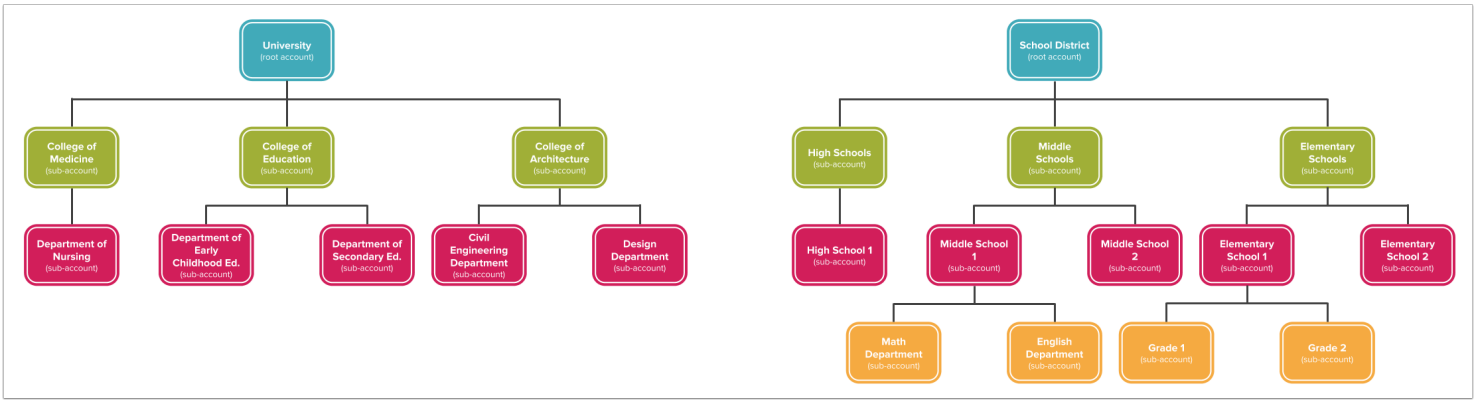
- Best Practices for Large Courses in Canvas
- Canvas Default Account Reports
- Canvas Admin Discussion
- Canvas LMS Blog

Accounts and Sub Accounts

What is the hierarchical structure for Canvas accounts?

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

View Hierarchy



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

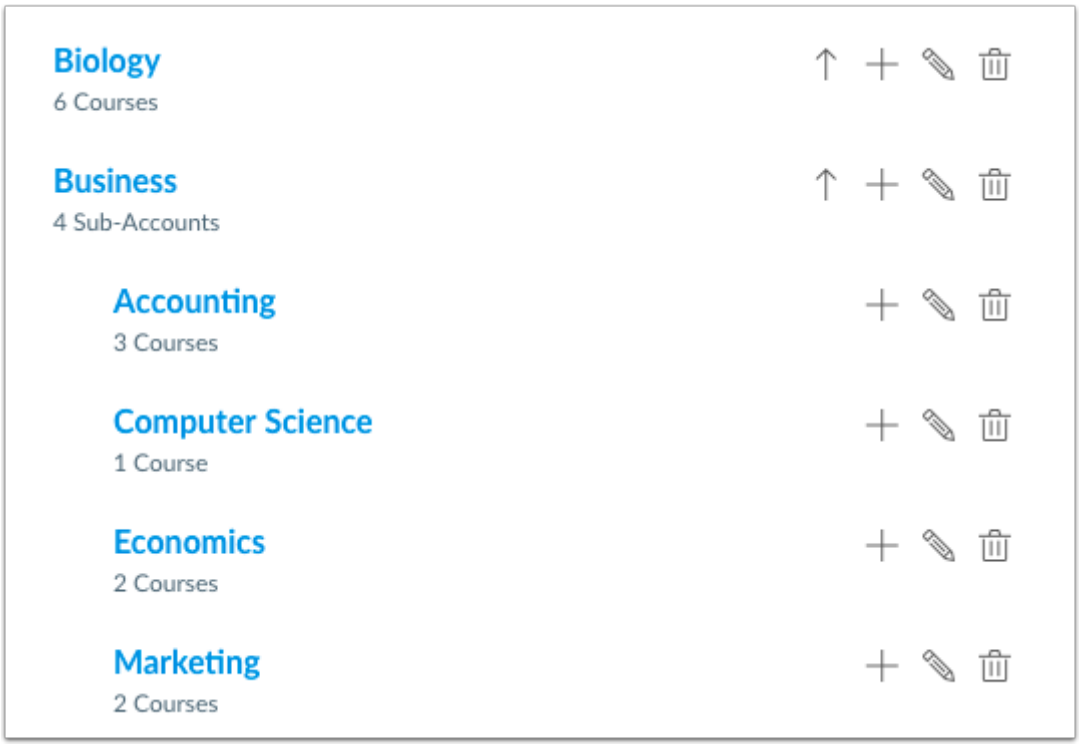
Account-level permissions are initially set by the root account admin and trickle down through the hierarchy but not up. Admins for sub-accounts can modify account-level permissions for their sub-account. Admins in one account have administrative permissions within that account as well as in any sub-accounts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

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

View Subaccounts

Sub-accounts are often used to manage permissions and organizational hierarchy within an institution. Many institutions set up sub-account organizational structures that mirror their SIS or registration systems. For example, sub-accounts can be created for individual colleges within a university, or for institutions within a

district. Sub-accounts can also be created within sub-accounts, such as when a college subdivides into departments that subdivide into programs, or a school that subdivides into grade levels that subdivide into specific subjects.



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

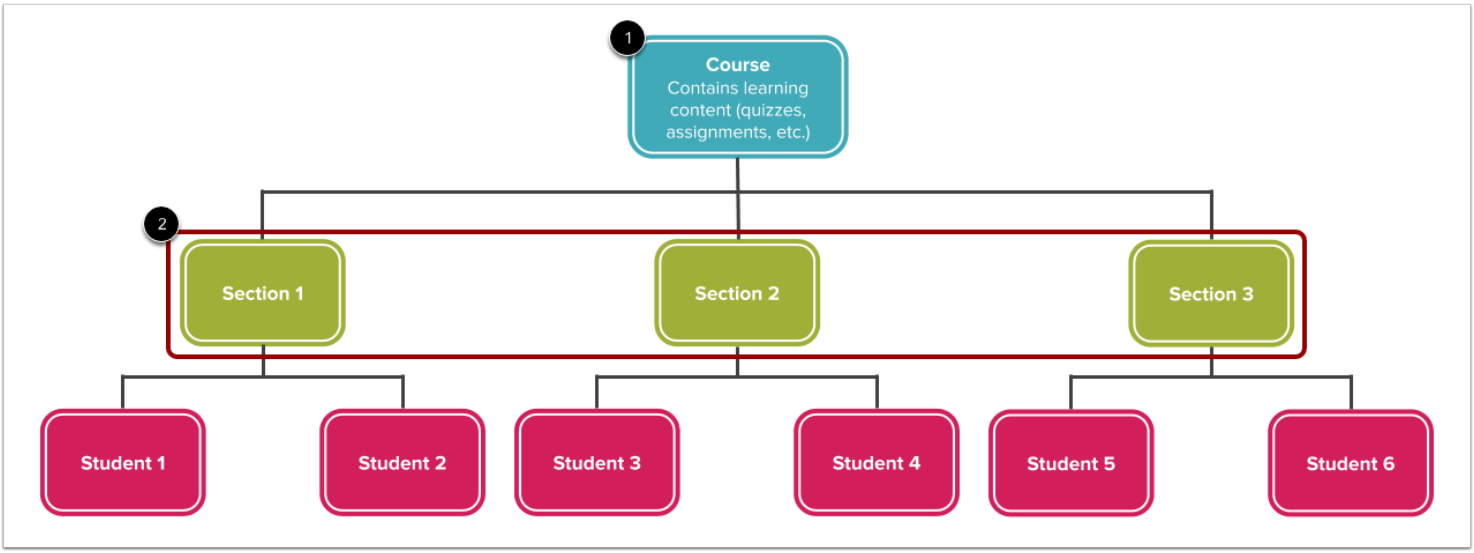
Sub-accounts can also be used to create and access question banks, outcomes, rubrics, grading schemes, reports, and analytics.

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

Organize accounts based on:

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

View Courses and Sections

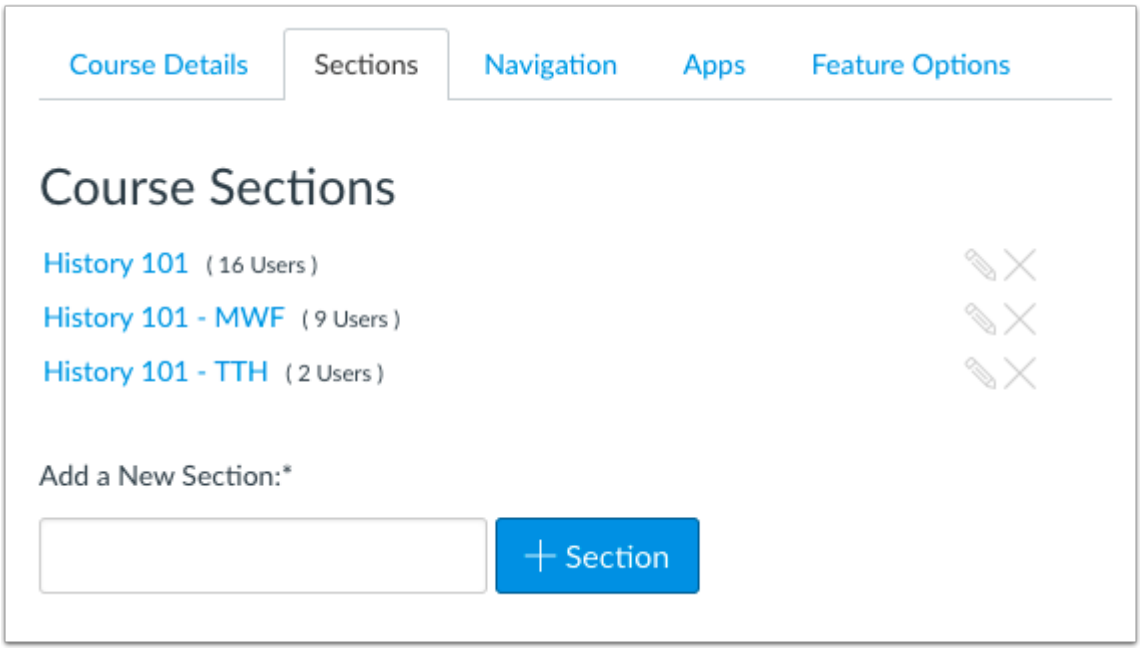


Courses are added to an account or subaccount [1]. Courses are the virtual classroom where all the content resides and where student users can learn and interact with instructors and peers.

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

If a course is taught by one or more instructors, sections can remain under one course if each instructor is added to their respective section.

Section Options



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

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

Note: Admins and instructors cannot restrict sections from accessing course navigation (i.e, Assignments, Discussions, Quizzes, etc.). If you want to assign specific assignments to individual sections, this can be done from the Assign To field.

How do I view and manage a sub-account?

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

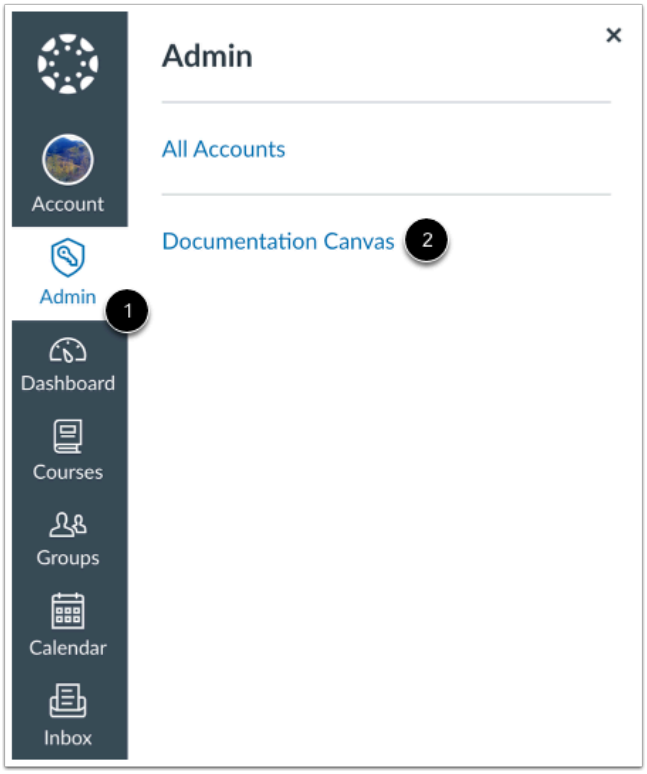
All of your institution's sub-accounts are located within the root account. However, sub-accounts can include additional nested sub-accounts, and sub-account admins can view a list of all the sub-accounts in their account.

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

Notes:

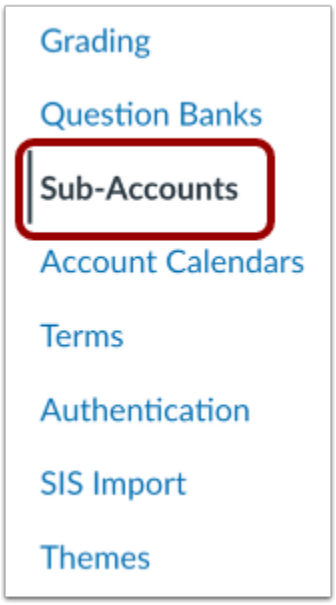
- Sub-accounts that contain courses cannot be deleted.
- Each root account automatically includes a sub-account called Manually-Created Courses that manages multiple backend processes for Canvas and cannot be deleted.

Open Account



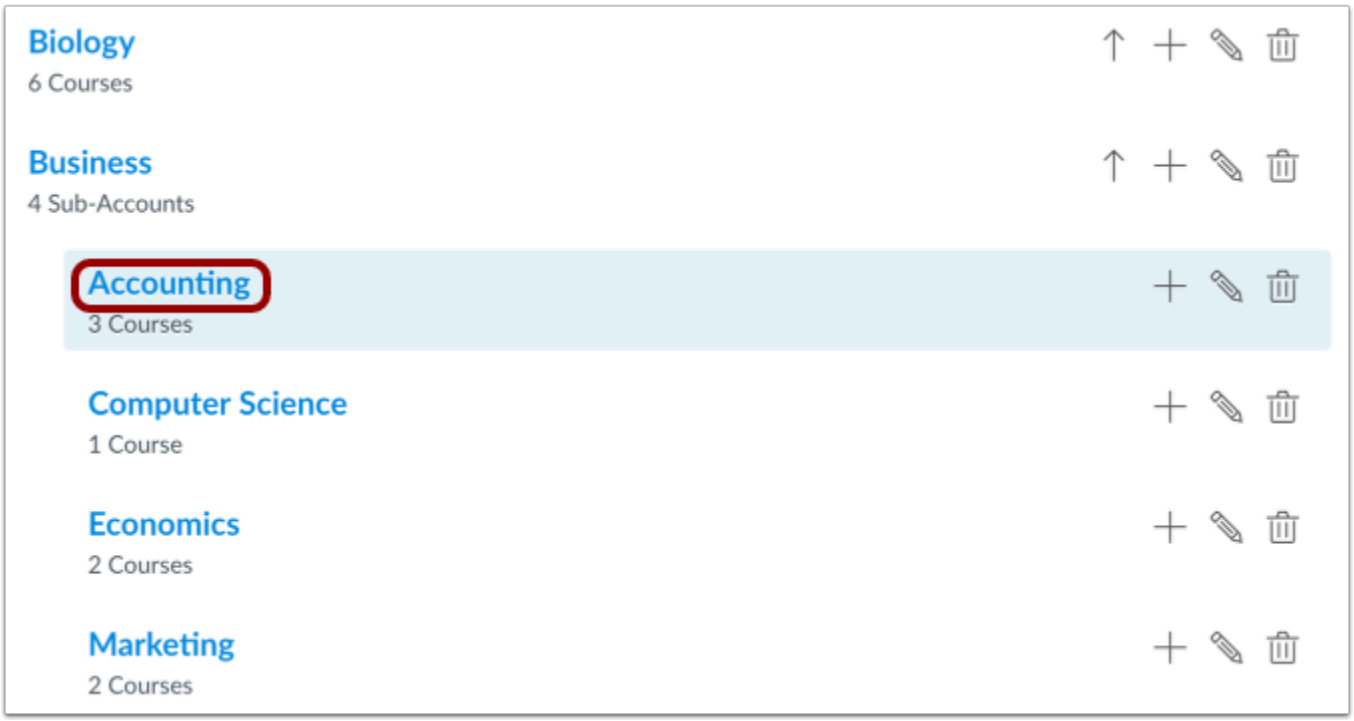
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Sub-Accounts



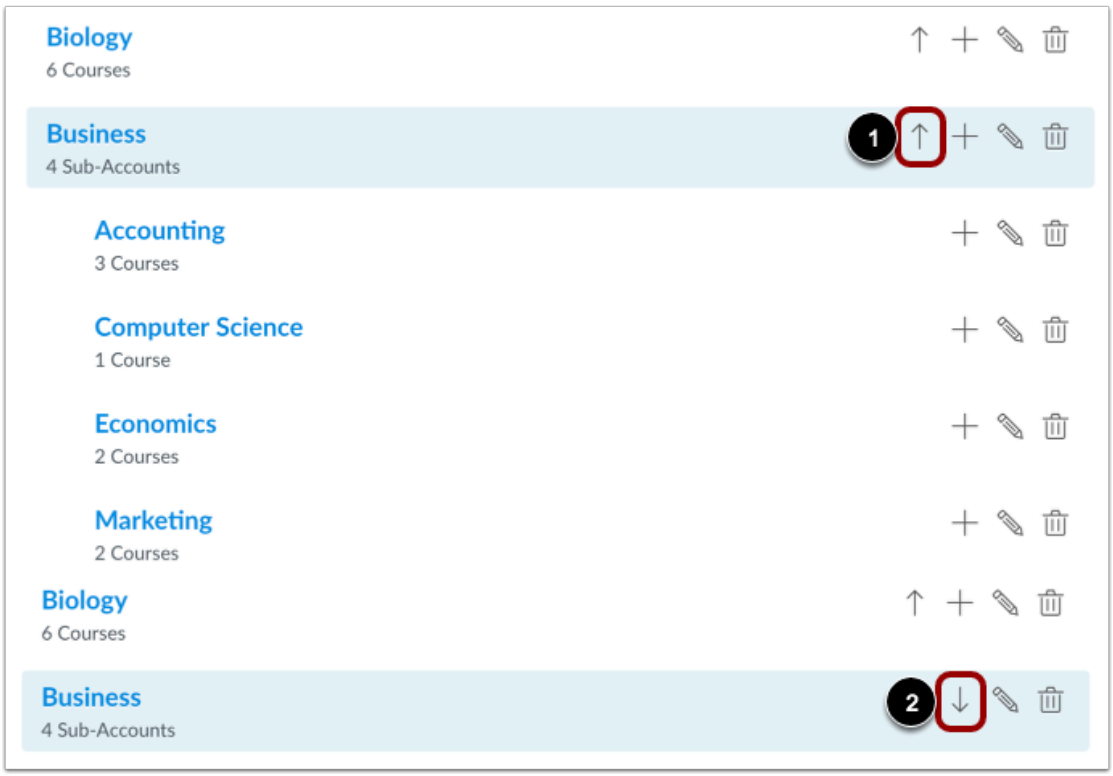
In Account Navigation, click the **Sub-Accounts** link.

View Sub-Account



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

Collapse and Expand Sub-Account List

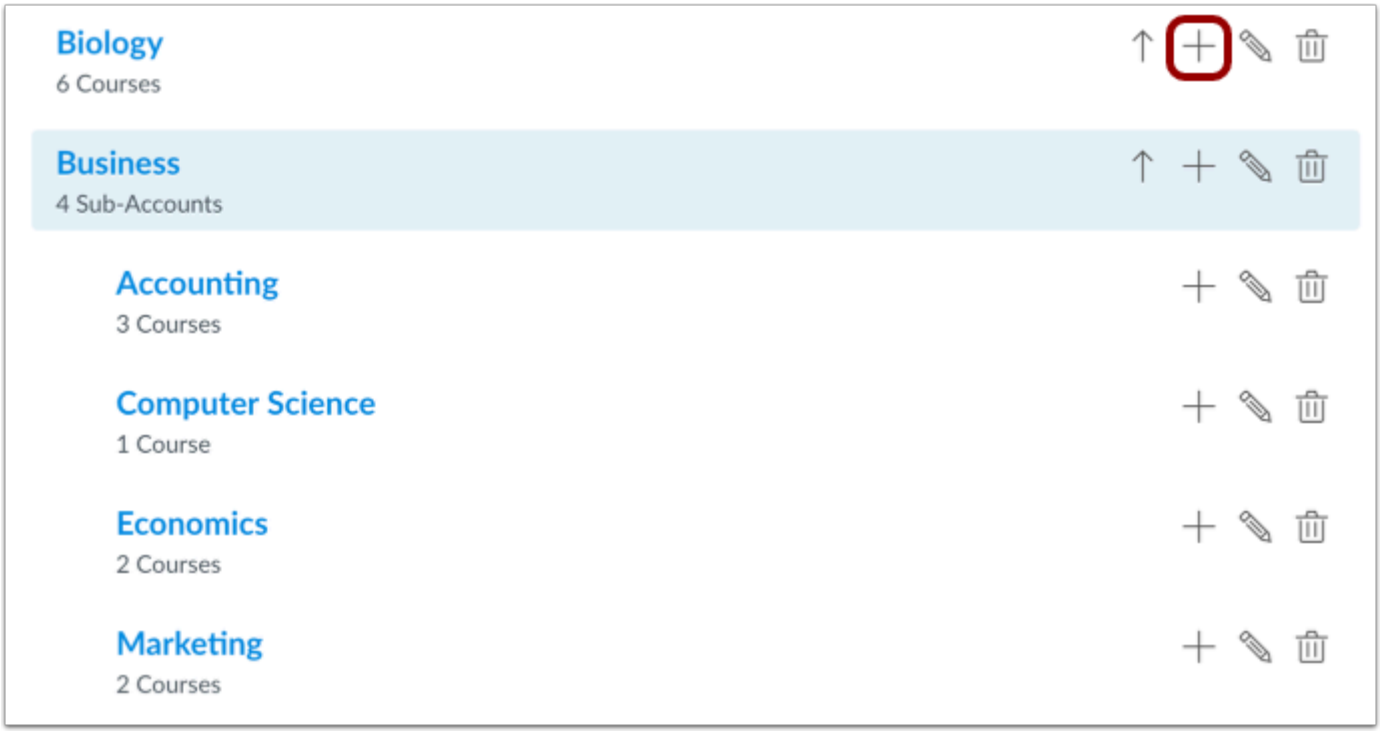


Many Canvas accounts contain multiple sub-accounts with nested sub-accounts. To more easily navigate within sub-accounts, you can collapse sub-account lists, hiding them from view.

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

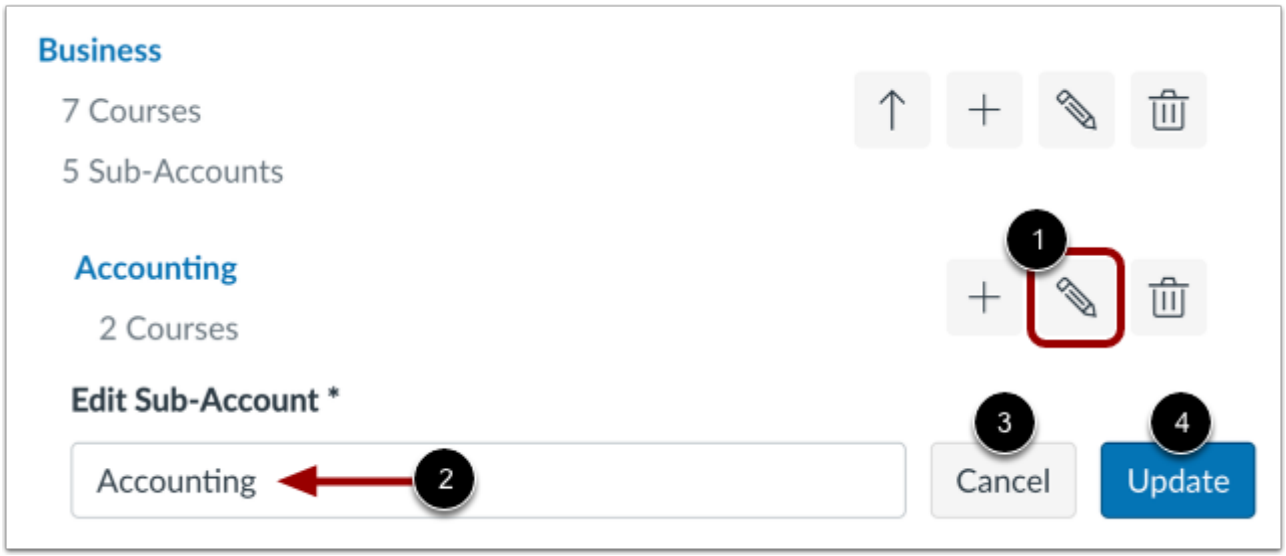
To expand a list of sub-accounts that have been collapsed, click the **Down Arrow** icon [2].

Add Sub-Account



To create a sub-account, click the **Add** button.

Edit Sub-Account Name

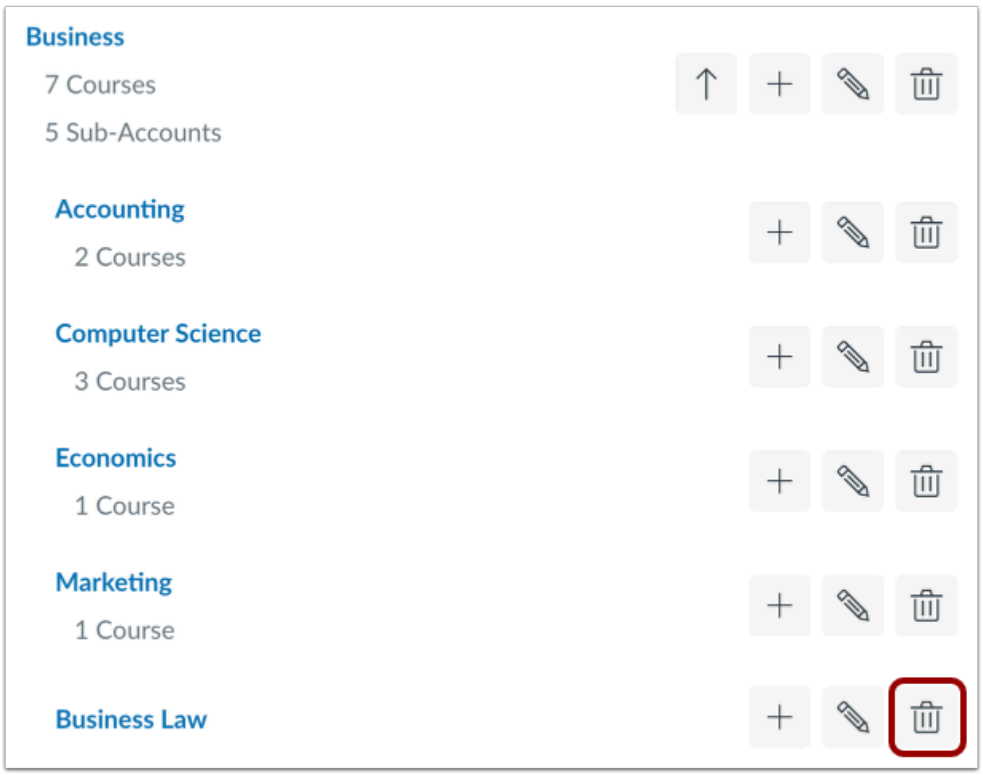


To edit the name of a sub-account, click the **Edit** button [1]. Edit the name of the sub-account by typing in the **Edit Sub-Account** field [2].

To discard your changes, click the **Cancel** button [3].

To save your changes, click the **Update** button [4] or press the **Return** key (on a Mac) or **Enter** key (on a PC) on your keyboard.

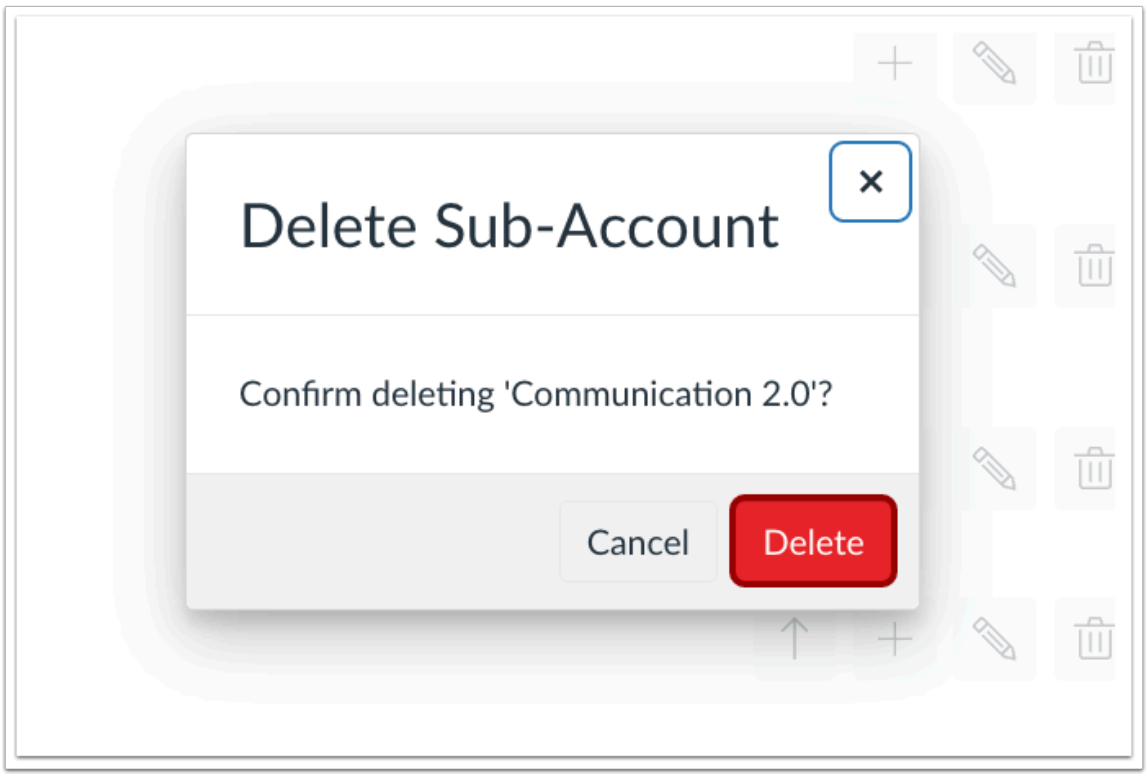
Delete Sub-Account



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

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

Confirm Sub-Account Deletion

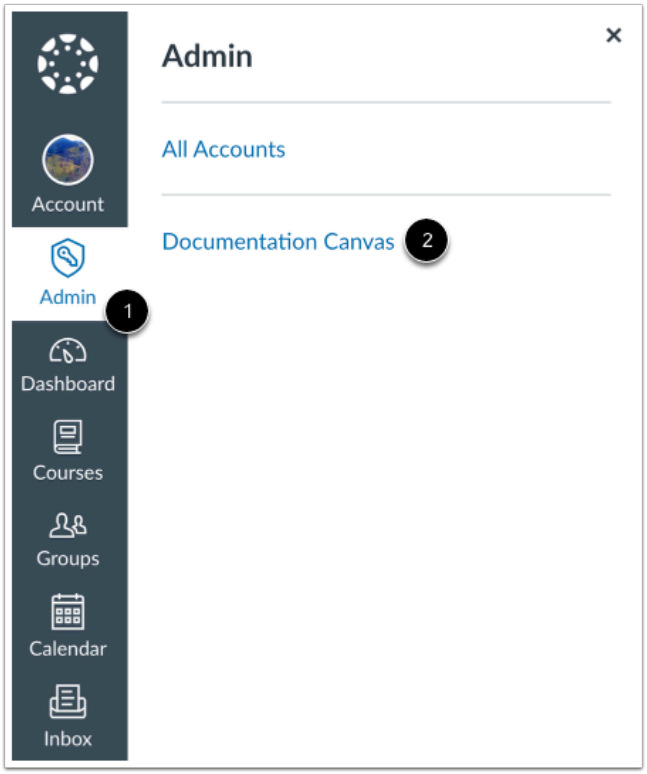


When you delete a sub-account, a pop-up window appears in your browser. Click the **Delete** button.

How do I create a sub-account?

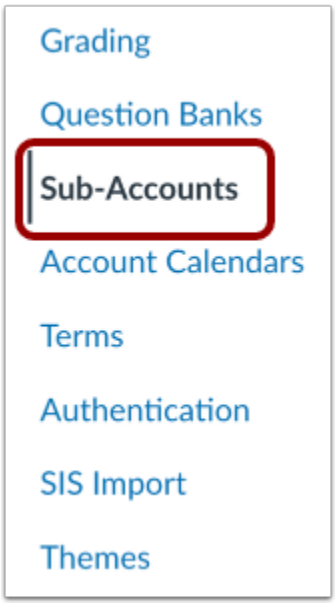
You can create sub-accounts in Canvas. Sub-accounts help establish your account's hierarchical structure and house courses and enrollments. Sub-accounts can be created manually or via SIS import.

Open Account



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

Open Sub-Accounts



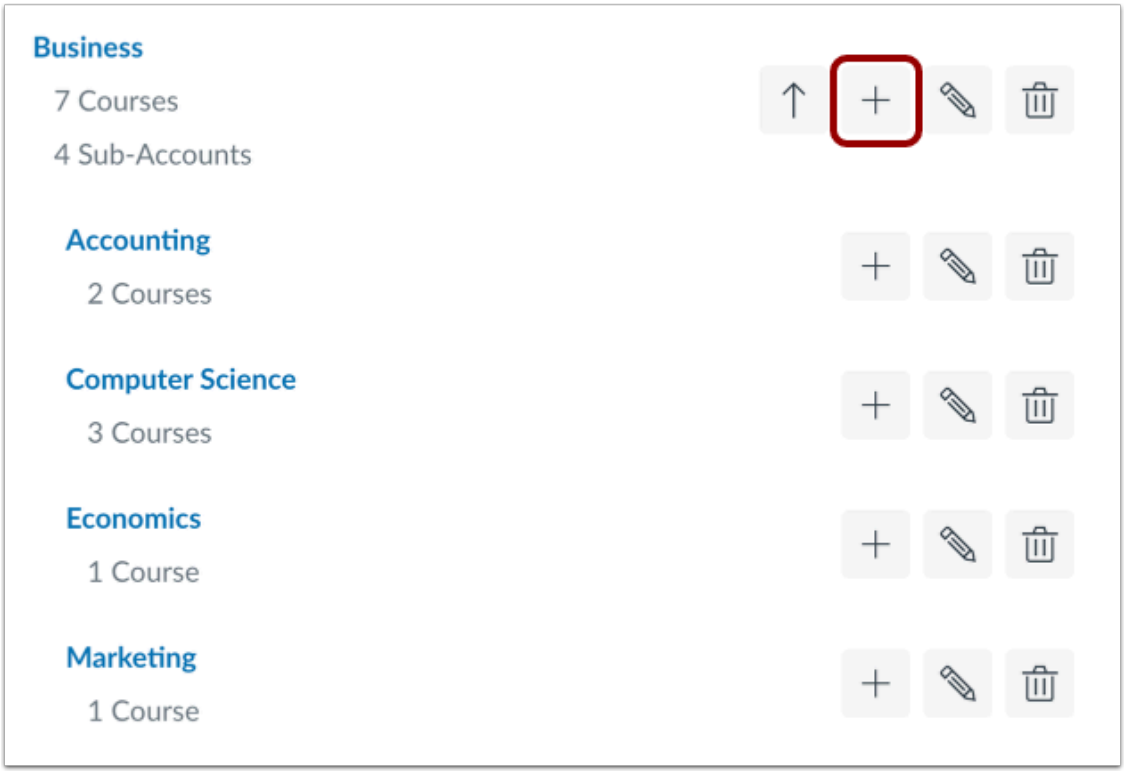
In Account Navigation, click the **Sub-Accounts** link.

Show Accounts



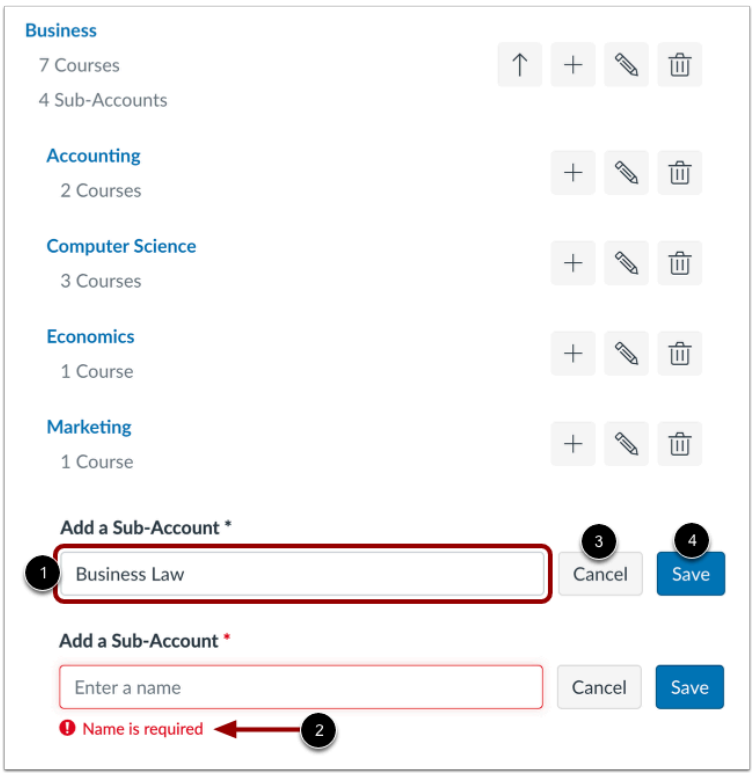
Click the **Down Arrow** to show sub-accounts.

Add Sub-Account



Click the **Add** button.

Add Sub-Account Name

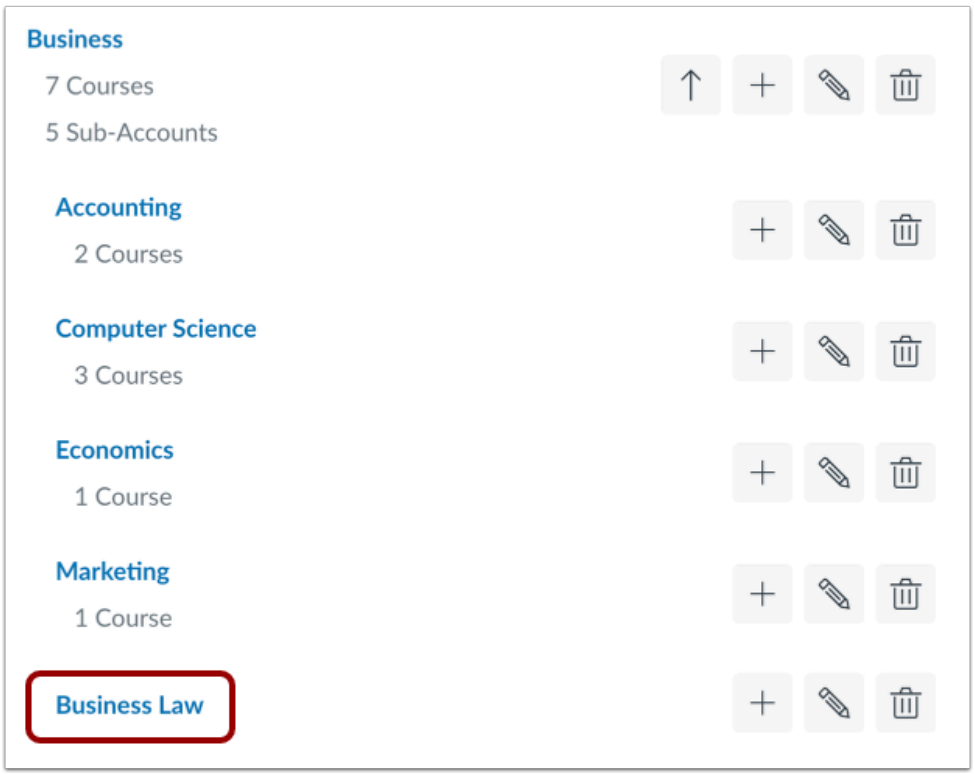


Enter a name for the sub-account in the **Add a Sub-Account** field [1]. If you attempt to save without entering a name, an error message displays [2].

To cancel creating a new sub-account, click the **Cancel** button [3].

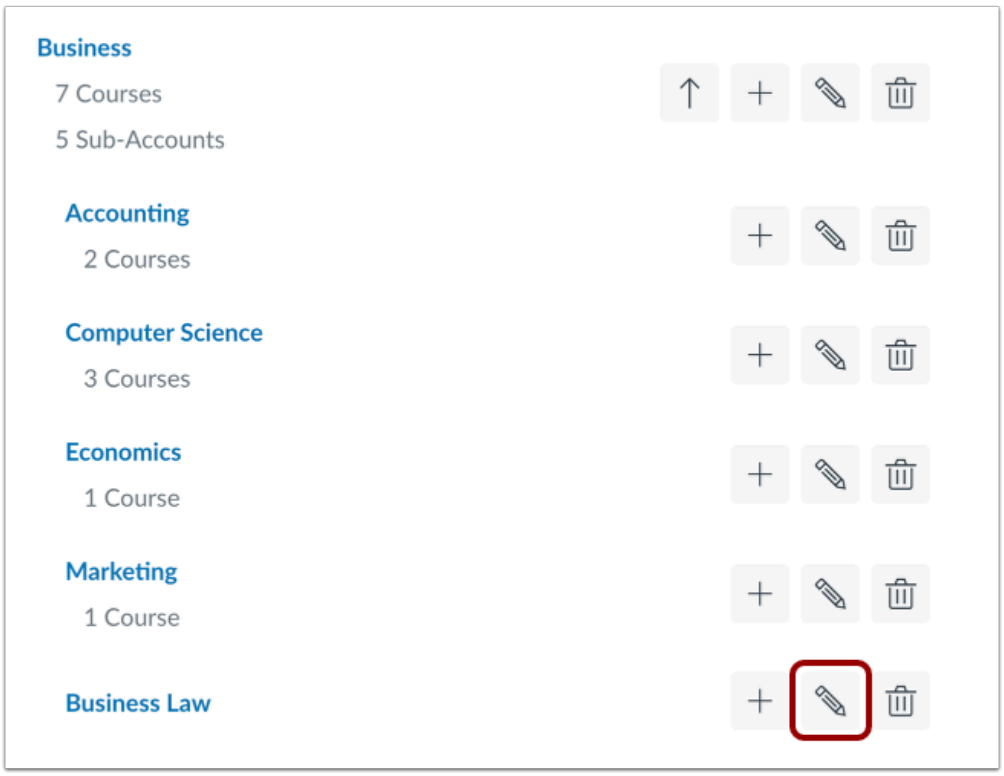
To create the sub-account, click the **Save** button [4] or press **Return** (on a Mac keyboard) or **Enter** (on a PC keyboard).

View Sub-Account



View the created sub-account.

Edit Sub-Account Name



To edit the name of a sub-account, click the **Edit** icon.

How do I add an admin to an account?

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

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

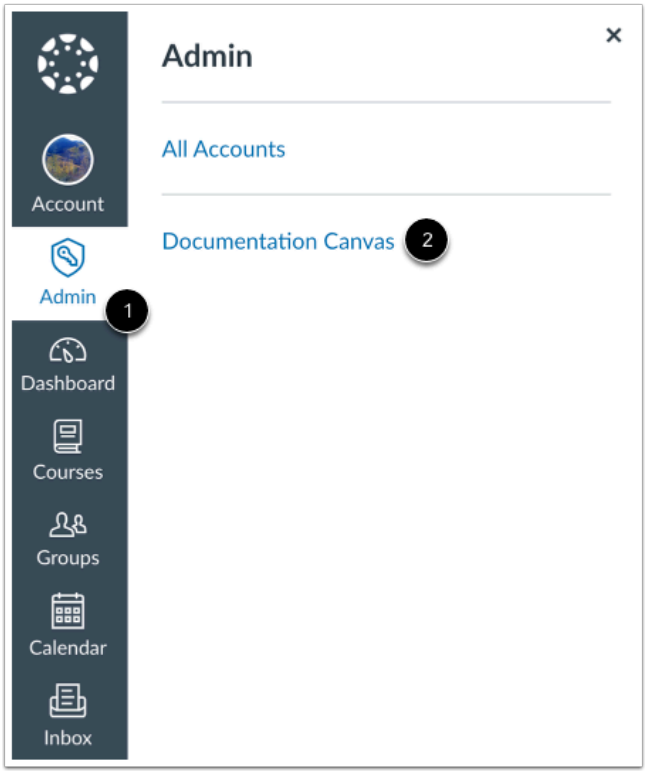
Once you add a user, if they already have a profile in Canvas, they will receive an email notifying them that they are now an admin for the account. If an added user does not already have a profile, they will receive an email with a link to create a profile and access the account.

After you have added a user as an admin, you cannot edit the admin user's account. To make changes, you must remove the admin account and add the user again.

Notes:

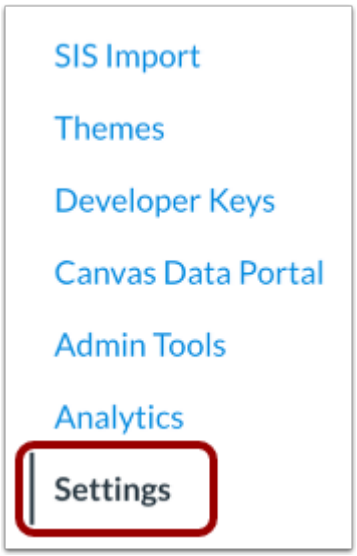
- To add a user as an admin, you must assign the user to an account role. Before adding a user, ensure that you have created the necessary account-level role.
- Your administrative user list includes the Conditional Release API, Outcomes Service, and New Quizzes Service, which are currently included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

Open Account



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

Open Settings



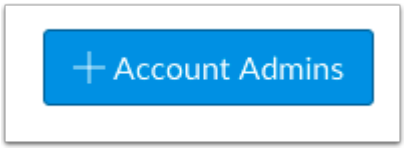
In Account Settings, click the **Settings** link.

Open Admins



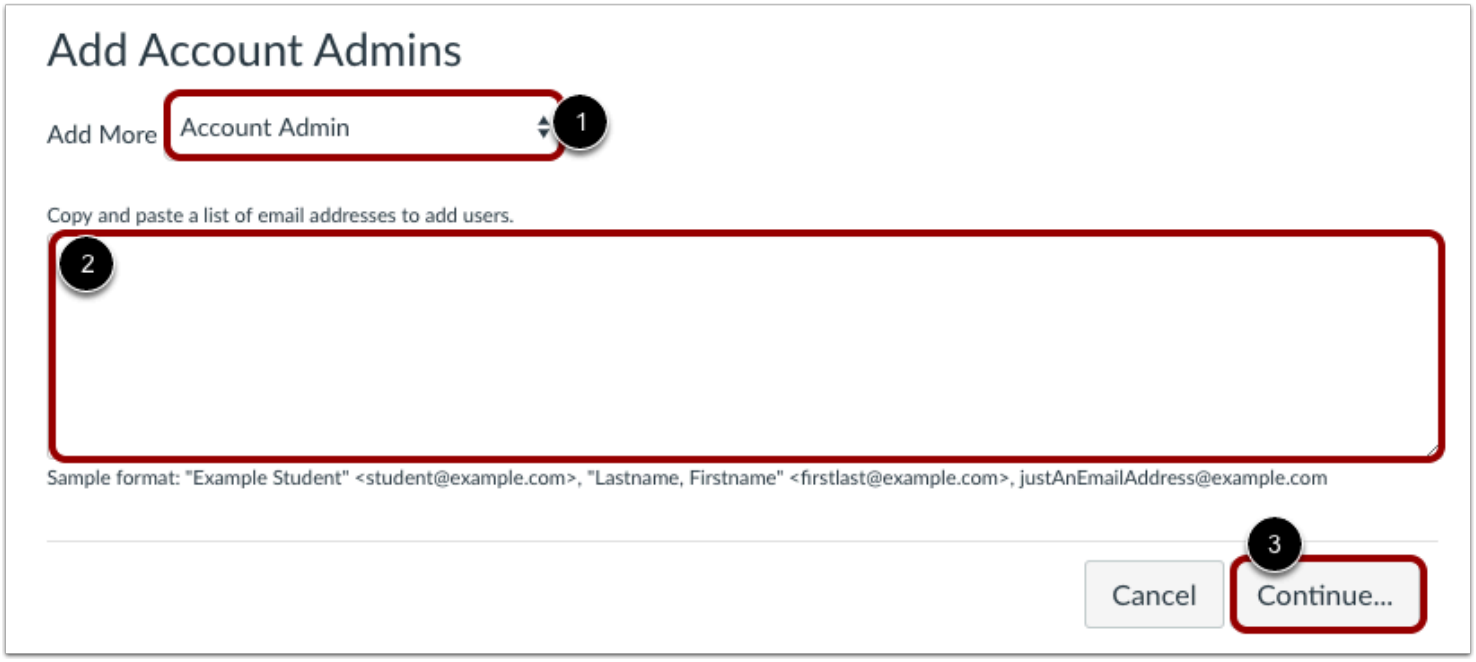
Click the **Admins** tab.

Add Account Admins



Click the **Add Account Admins** button.

Add Admin Role and Email



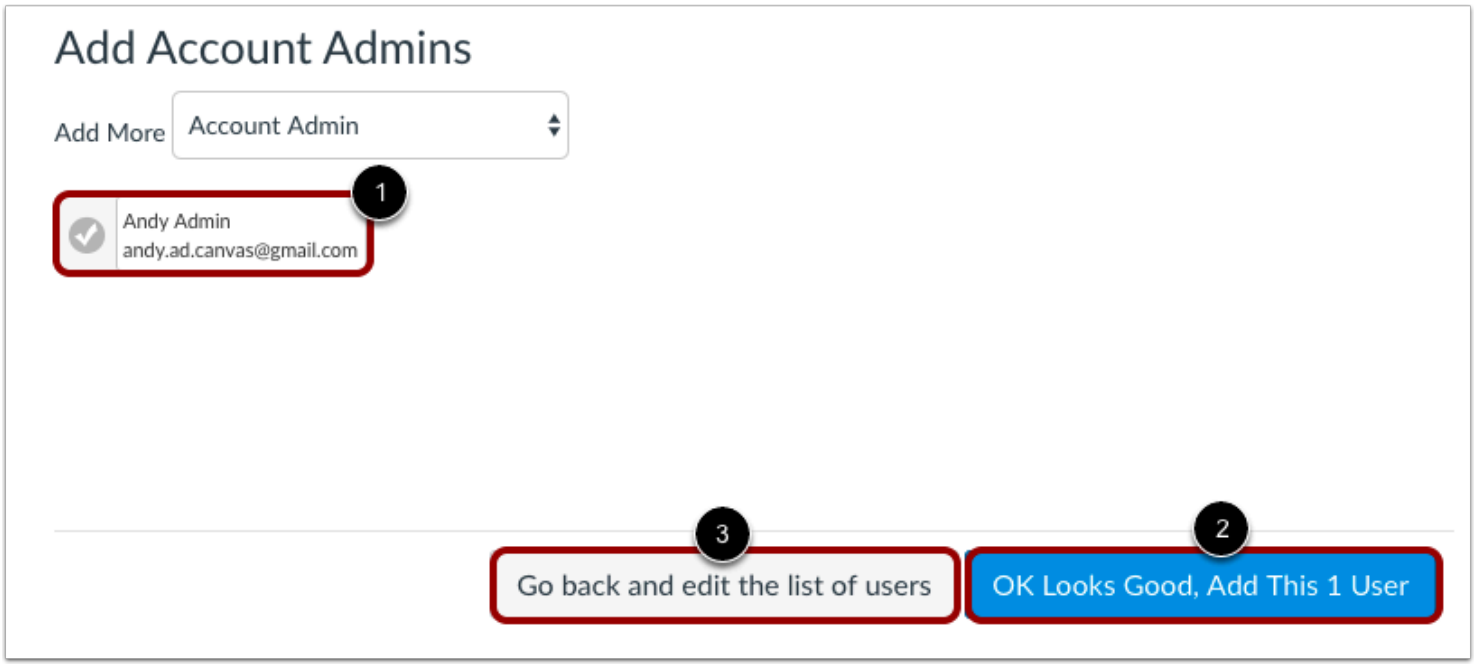
In the **Add More** drop-down menu [1], set the admin role type. The default admin role in Canvas is Account Admin which has access to all account-level permissions. You can also create admin roles for your institution and manage their permissions.

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

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

Note: Once you add a user as an account admin, they will have all permissions listed on the Permissions page for the selected role. Additionally, you cannot edit an admin account after you create it. If you need to change an admin user's role, you must delete their admin account and add it again.

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.

What is a trusted account in Canvas?

A trusted account is an instance of Canvas that has a trust relationship with another instance of Canvas. Instead of creating two separate accounts and merging them together, a trust relationship allows separate Canvas accounts to share user identities, so a user can log in to one account and access courses from both accounts.

If you select a third party authentication provider, you can select a trusted Canvas instance as the authentication provider. Learn more about configuring trusted Canvas instance authentication.

Notes:

- When students enter a course in a Canvas instance with Tier One support, they have access to the Tier One phone number, but the support case is routed to their home Canvas instance support process.
- The user license is counted in the instance where the user is created.
- When a student enters a course in a trusted account, Global Navigation displays in the theme of the Canvas instance of the course.
- Canvas Consortiums use a one-way trust. Learn more about how Canvas Consortiums use trust accounts.

Establish a Trust

To establish a trust between two or more accounts, the Canvas Operations team configures a trust setting, which is stored in the Canvas code. The Canvas interface never shows that a trust relationship is present. Trusts can be established between multiple accounts.

Contact your Customer Success Manager to discuss trust accounts or to establish a trust.

Confirm Trust Account

To verify whether a trust has been established in your account, log in to Canvas and enter *https://yourdomain.instructure.com/api/v1/accounts/:id/trust_links* in your browser's address bar.

If you see something like the text below, it means the institution is trusting another institution:

{
"id": 2,
"managing_account_id": 21980000000000000,
"managed_account_id": 1
}

If you see a blank page, it means the institution is not trusting any other Canvas instances.

Note: Sharing data between institutions is completely up to the institutions that are entering into the trust relationship. Instructure does not share user data between institutions outside of Canvas.

Add Users

Manually via User Interface

If you're adding someone manually to a course by their user_id, login_id, or email, a column displays on the confirmation window that includes **Institution**. The Institution column displays the location of the user's profile.

SIS Import with CSVs

Another method of enrollment is to import a formatted CSV file. Using the **enrollments.csv** file, a column called **root_account** is required for those users who exist in another institution. Use the user_id and the Canvas URL of the trusted account (e.g., school2.instructure.com) in the CSV file to upload in the SIS Import page of Canvas.

Additionally, the **root_account** field in the **logins.csv** file is required when identifying users in a trusted account (e.g., when cross-listing users across accounts within a trusted account).

The user performing the import must be in the account where the course exists. For example, Institution 1 has a course and they need to enroll users from Institution 2, a trusted instance. The admin from Institution 1 (where the course exists) would generate an enrollments.csv file with the user_id of the student from Institution 2. Within the **root_account** column of the CSV, the admin would enter Institution 2's Canvas URL (institution.instructure.com), omitting the https:// from the CSV file. After completing the rest of the enrollments.csv file, the Institution 1 Admin would then import that file on institution.instructure.com/accounts/:id/sis_import page, or they can upload it via SIS Imports API.

Trust Accounts in Test Environments

You can test trusts in a beta environment or another test environment as long as there is a trust established. Additionally, if you are importing from a CSV, you must set the **root_account** column in the **enrollments.csv** to the URL of the beta or test environment (institution2.**beta**.instructure.com).

Note: After an initial trust is established in a beta environment, the trust must be reestablished after a beta reset occurs.

User Role Expectations and Limitations

Students, instructors, and admins can perform various activities in their home accounts and their trust accounts. Learn more about trust account user roles and expectations.

The following behaviors do not apply to trust accounts:

- Trusts do not show any information in the user interface indicating a trust with another institution or that the course you are enrolled in is at another institution. The trust is an invisible link that exists between two or more sites. Users enrolled in courses at trusted other institutions are only able to see the names of the courses in which they are enrolled.
- Trusts do not provide any data or a summation of which users are in a trust enrollment at another institution.
- User lists from one institution cannot be browsed from another institution. Admins from both institutions need to work out a business process to send enrollments from one institution to another.
- Trusts do not provide any automation for trust enrollments. Users are enrolled via CSV uploads or via the API.
- You cannot act as another user who is associated with a trusted account. You can only act as users who are associated with your same account.

How do I manage themes for an account?

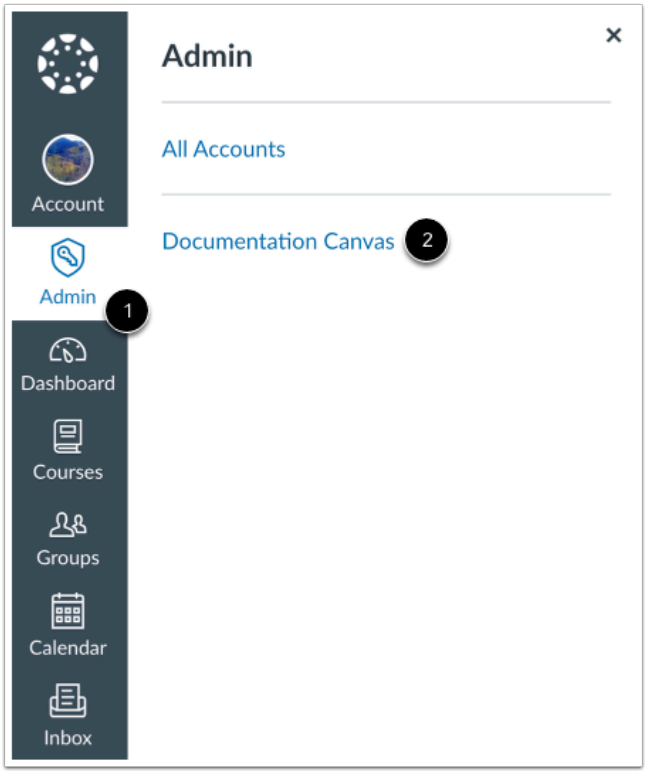
Each Canvas account displays a default Canvas theme. As an admin, you can create and manage themes using Canvas templates, or you can create a theme specifically designed for your institution.

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

Notes:

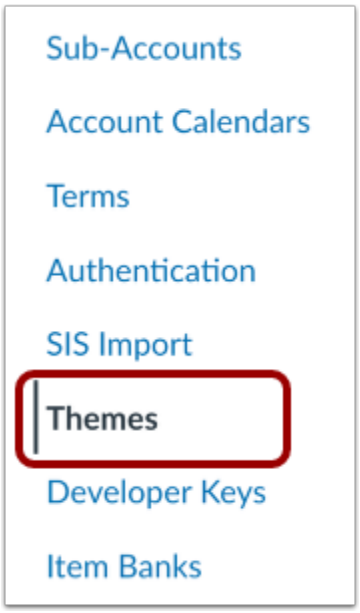
- If you are a sub-account admin and the Themes link is not visible in Account Navigation, Themes has not been enabled for sub-accounts.
- By default, consortium child accounts inherit the theme applied in the parent account. However, a consortium child account can create a new theme for the child account.
- 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.

Open Account



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

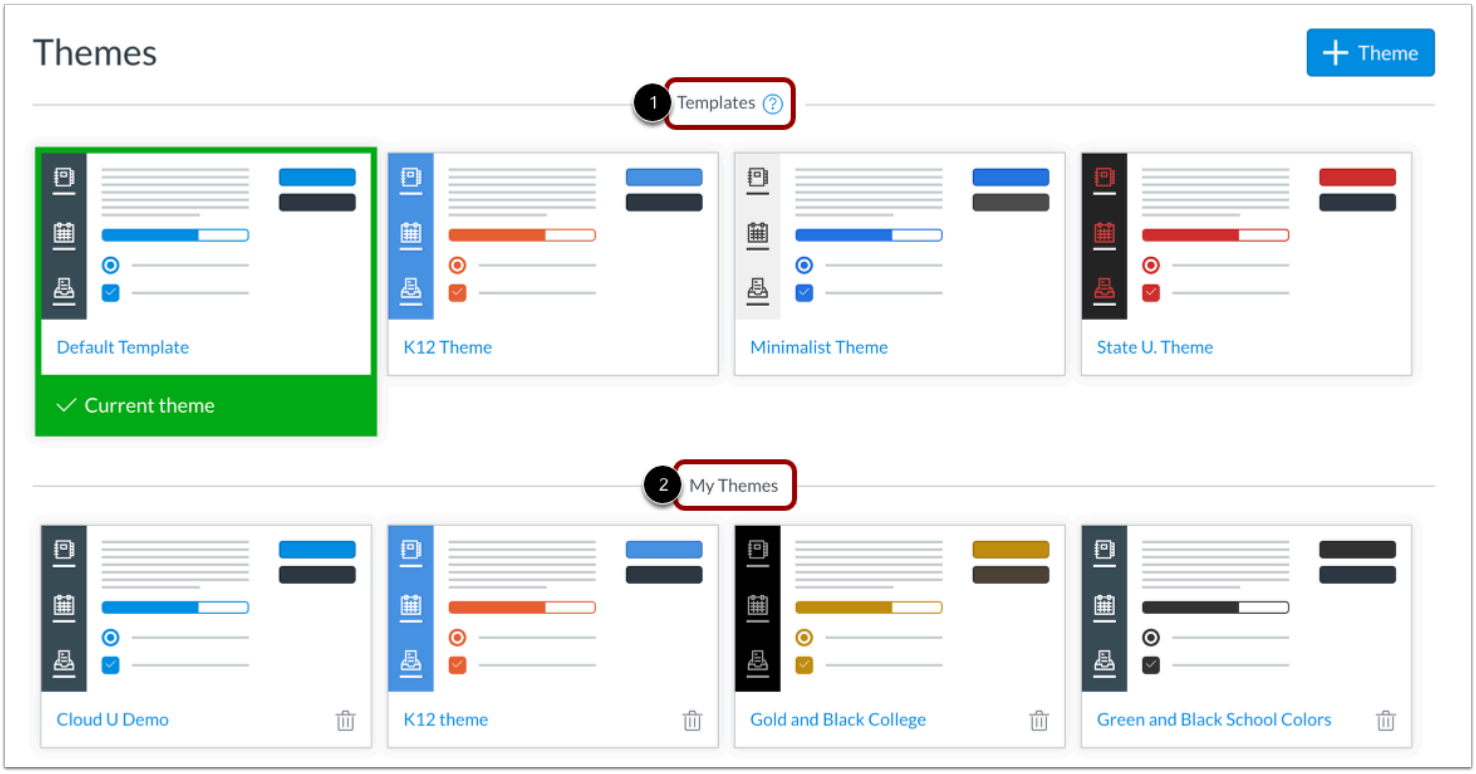
Open Themes



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

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

View Theme Sections

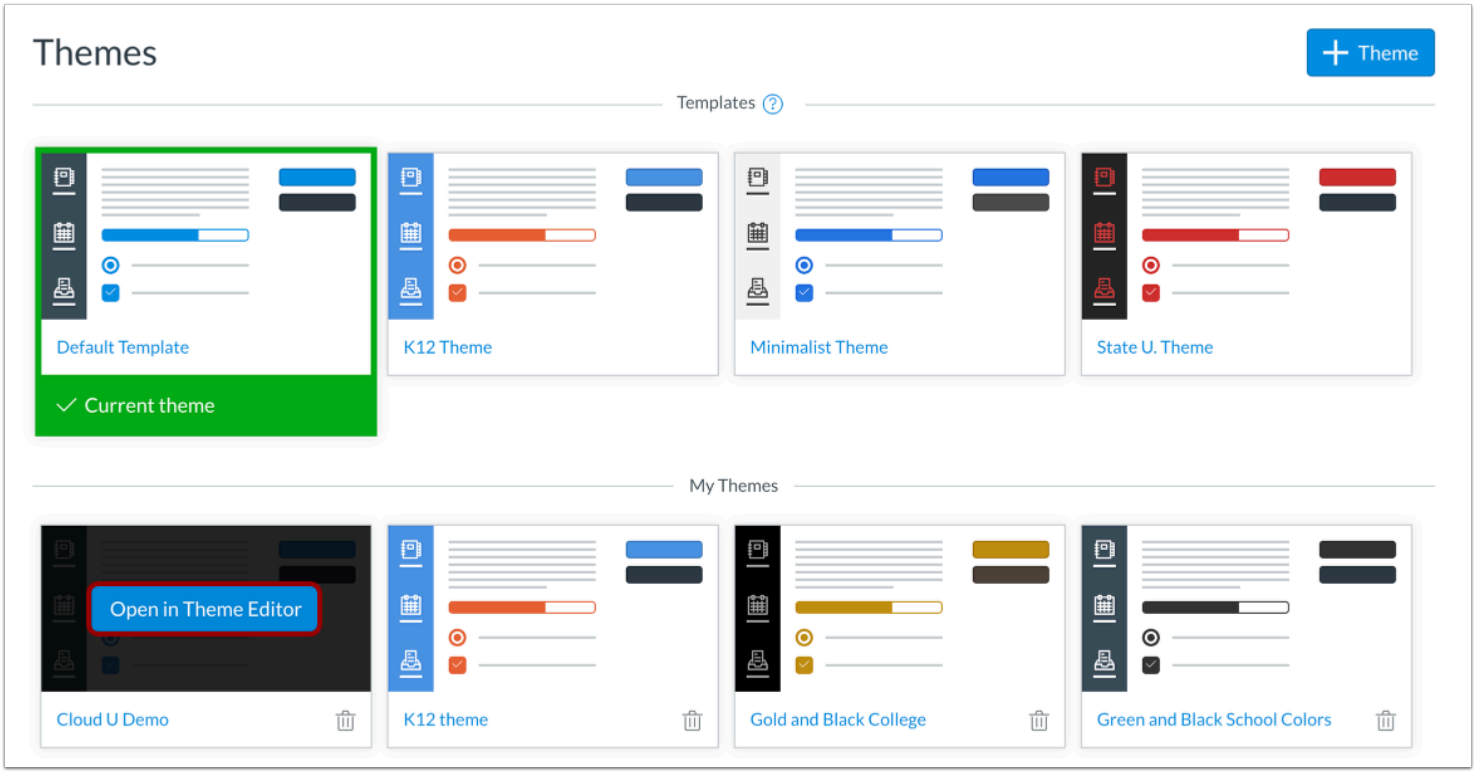


The Themes page displays all available templates and saved themes for your institution.

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

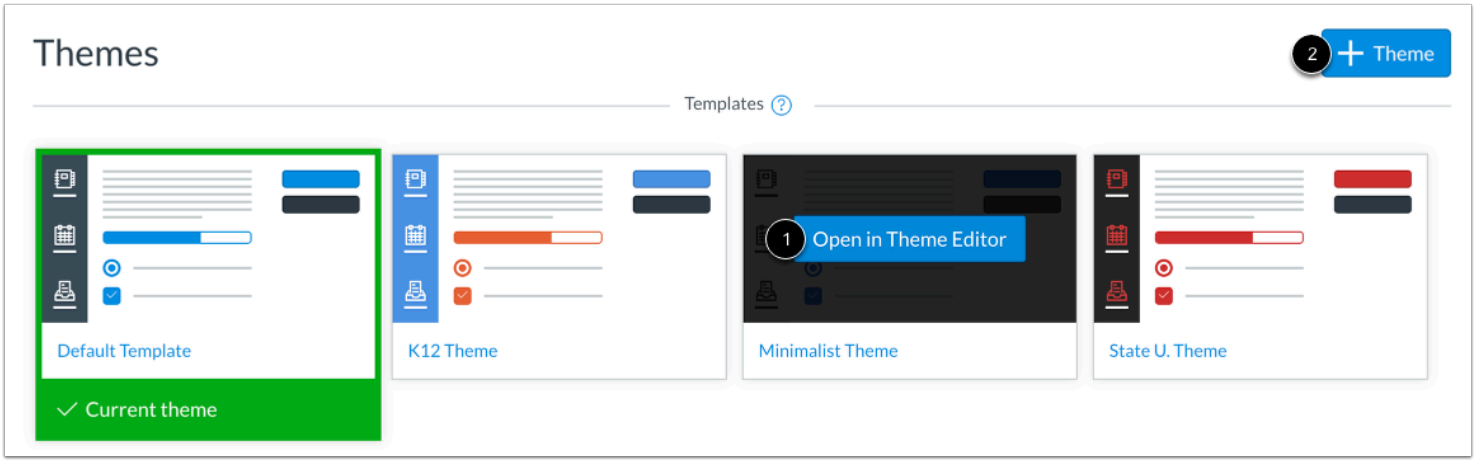
Once a theme is saved in the account, the page displays the My Themes section [2]. My Themes shows all themes saved for the account.

Open Theme



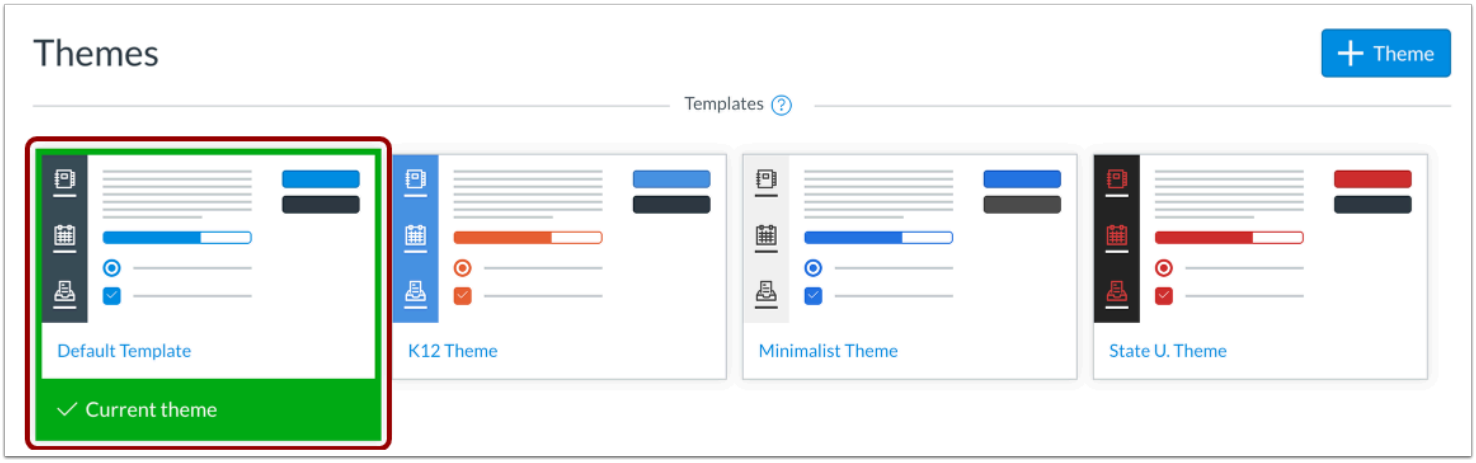
To open and view any theme, hover over the theme and click the **Open in Theme Editor** button.

Create Theme



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

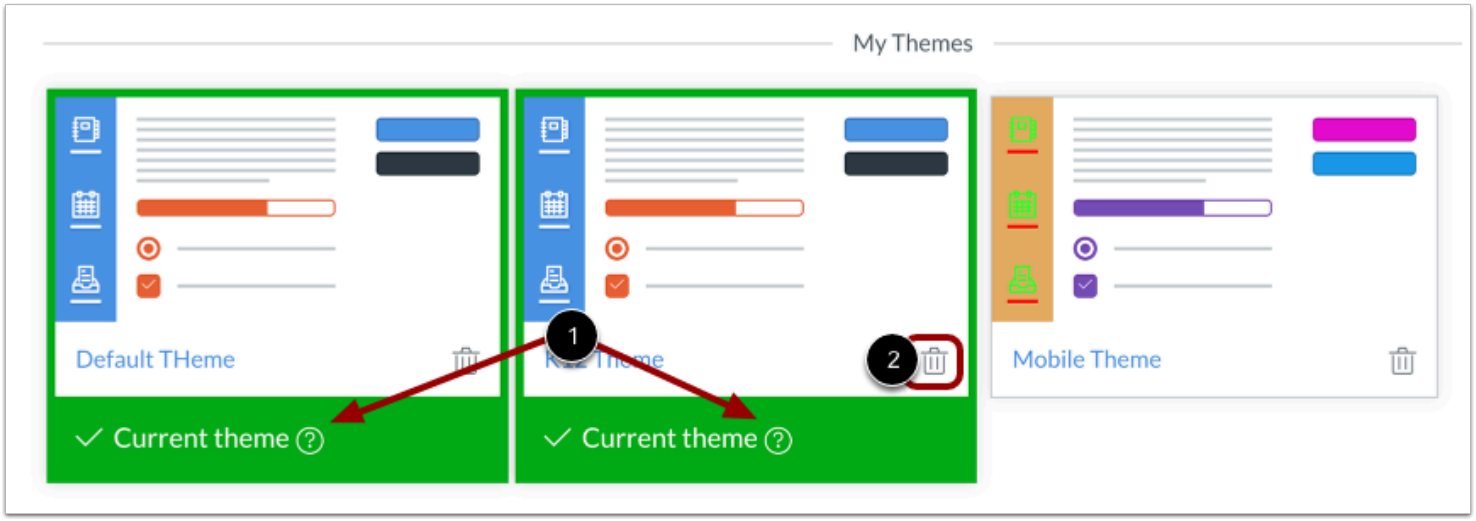
View Current Theme



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

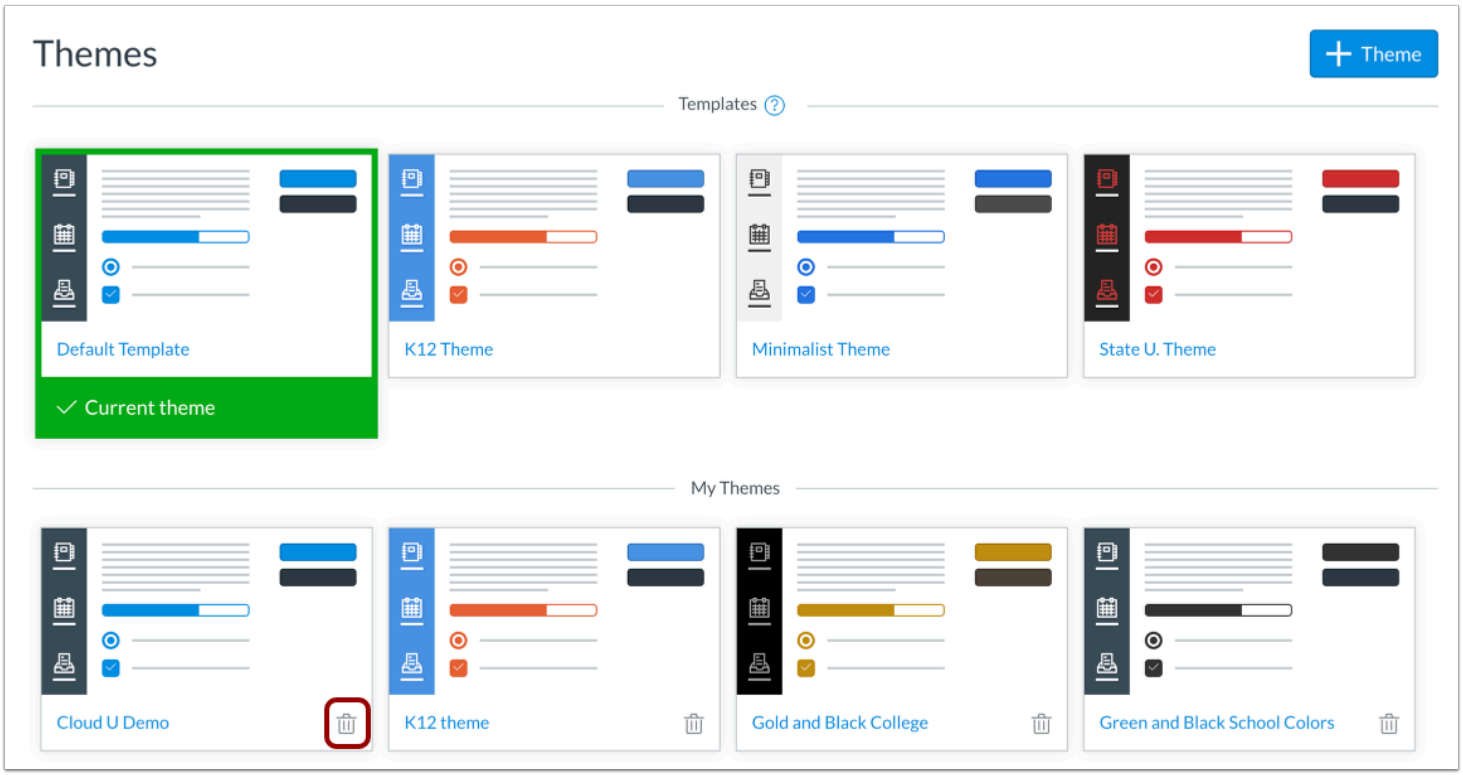
To apply a different theme, open and apply any other saved theme or create a new theme for the account.

View Multiple Active Themes



If multiple themes display an information icon [1], each theme includes the same set of values that are being applied as the current theme. To delete one of the themes, locate the theme and click the **Delete** icon.

Delete Theme



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

Note: The current theme cannot be deleted. To delete the current theme, open and apply any other saved theme or create a new theme for the account.

How do I create a theme for an account using the Theme Editor?

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

View a video about the Theme Editor.

Theme Inheritance

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

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

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

Theme Editor Components

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

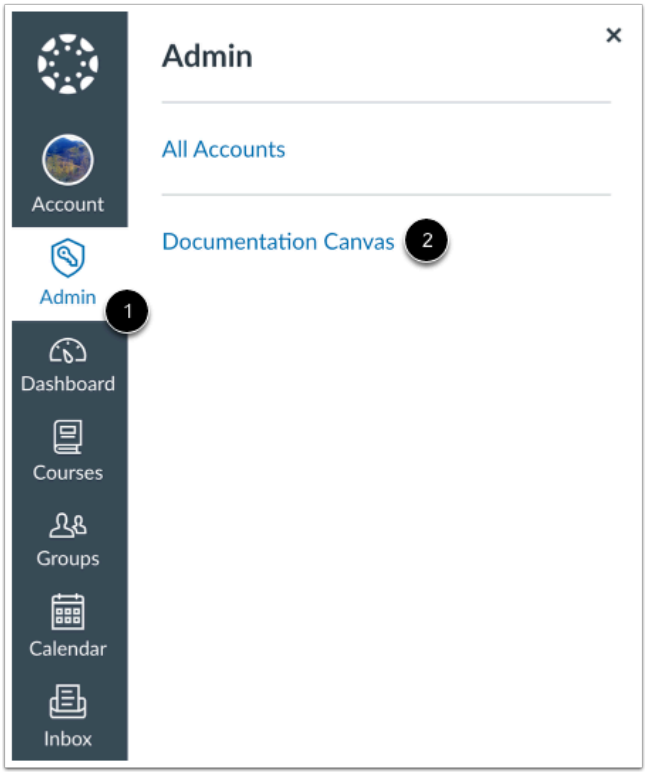
CSS/JS Files

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:

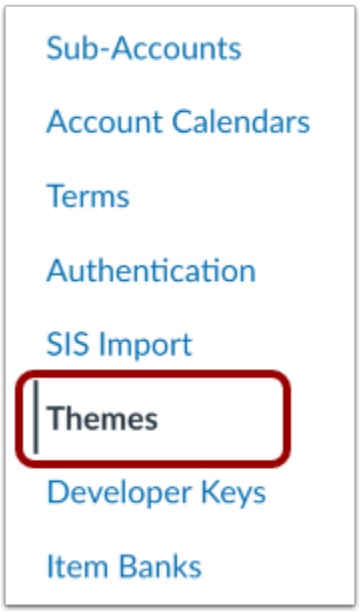
- The Theme Editor is not available for Free-For-Teacher accounts.
- If you are a subaccount admin and the Themes link is not visible in Account Navigation, Themes has not been enabled for sub-accounts. If the CSS/JS Upload tab is not visible, file uploads have not been enabled for sub-accounts.
- To preview Theme Editor branding, you need to turn off High Contrast UI.
- By default, consortium child accounts inherit the theme applied in the parent account. However, a consortium child account can create a new theme for the child account.

Open Account



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

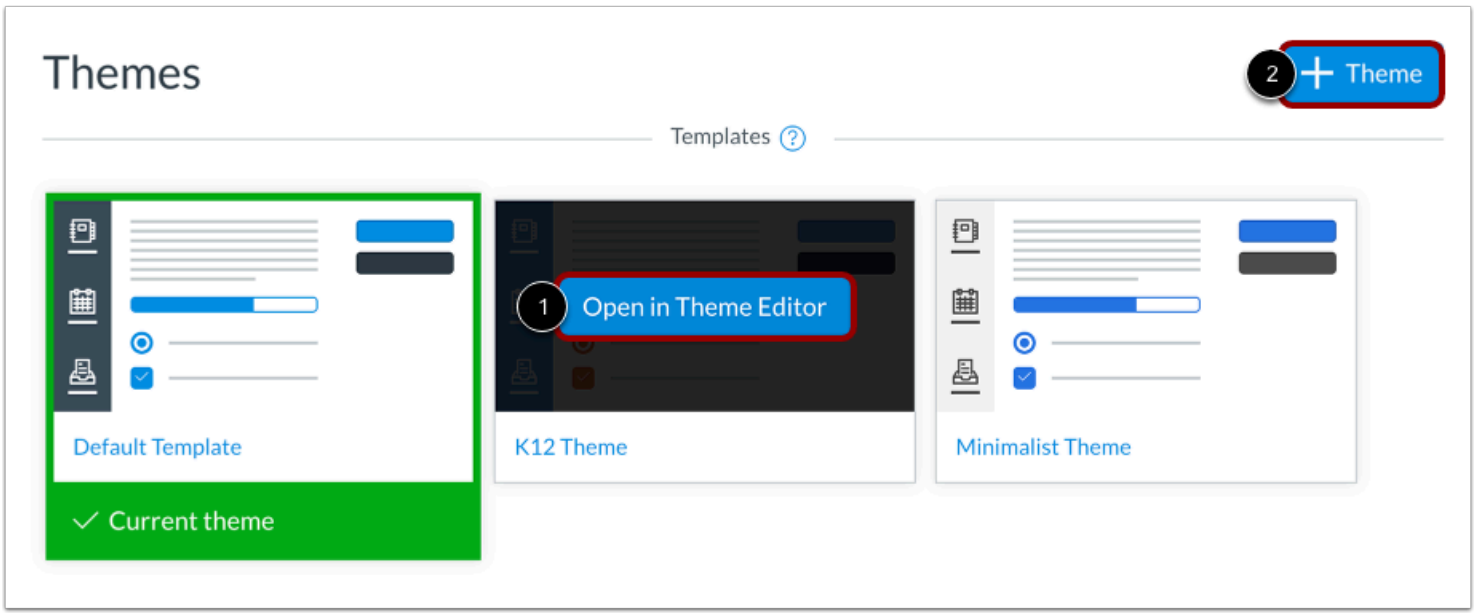
Open Themes



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.

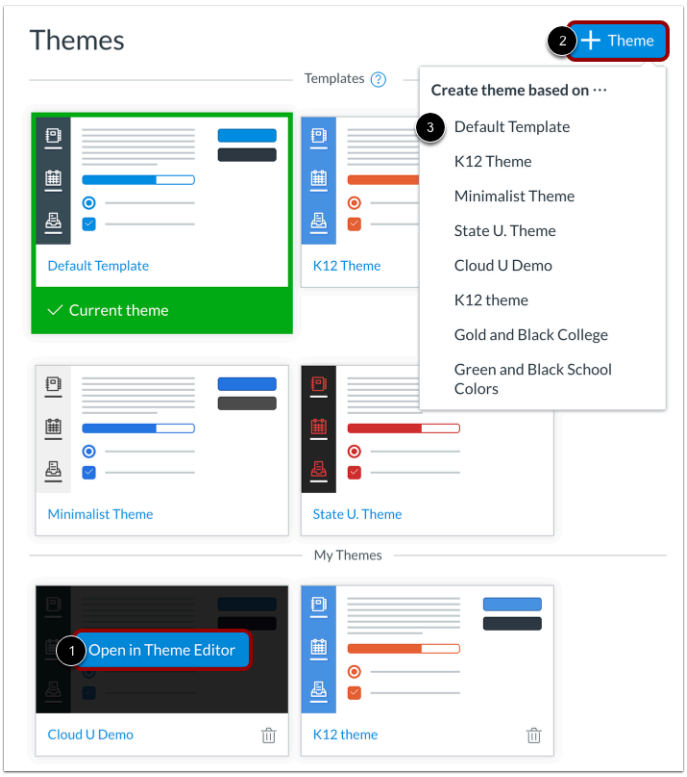
Open Theme Template



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.

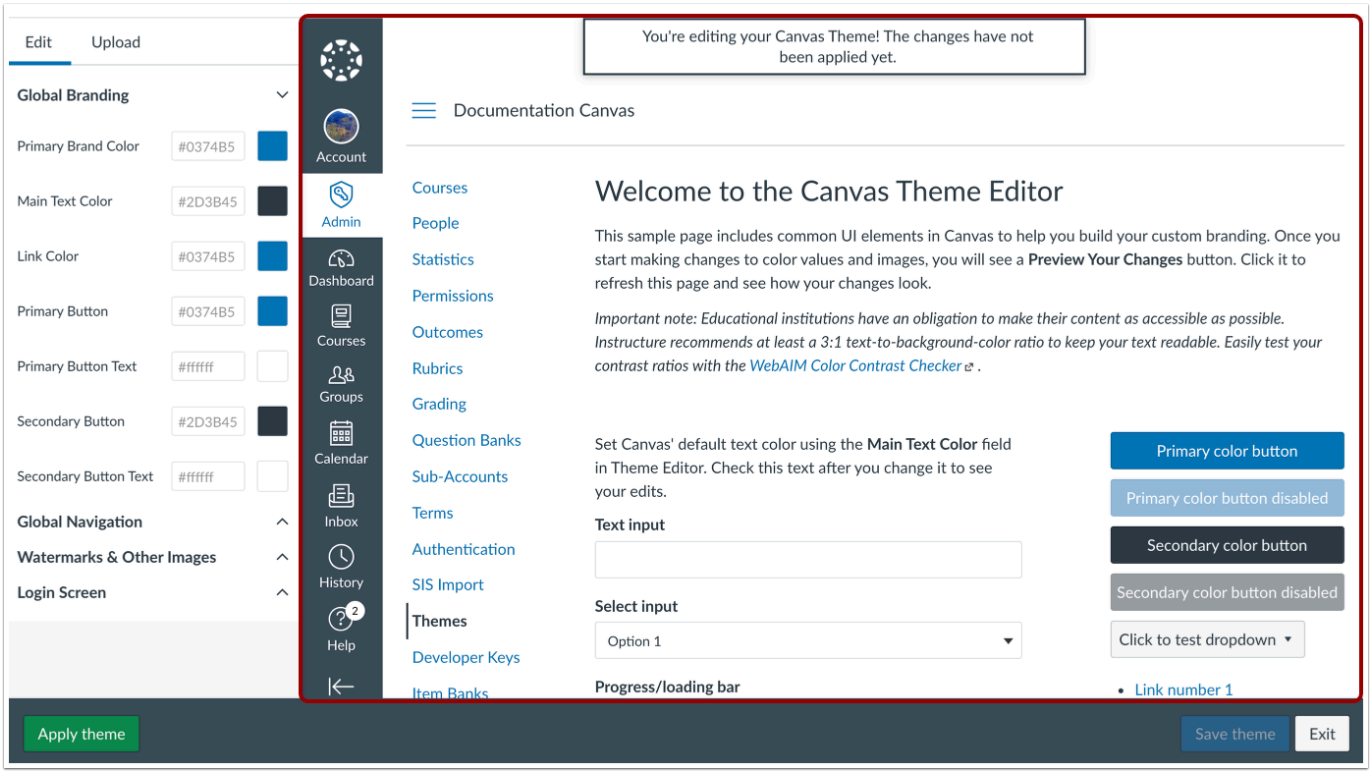
Open Saved Theme



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].

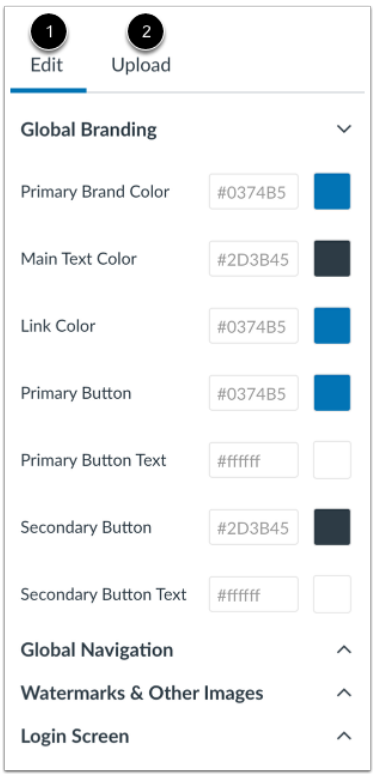
To create a new theme based on a saved theme, click the **Add Theme** button [2] and select the name of the saved theme from the list [3]. This option helps you avoid overwriting your previously saved theme.

View Theme Editor



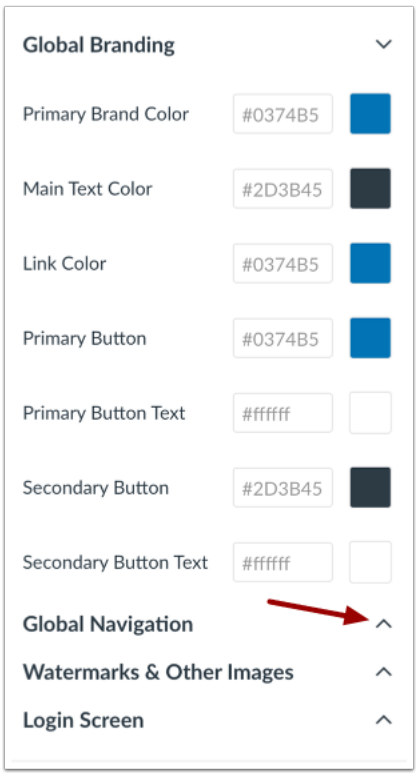
The Theme Editor displays a sample page to preview your custom branding. These components will change with the colors and branding that you add using the Theme Editor.

View CSS/JS Upload Tab



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

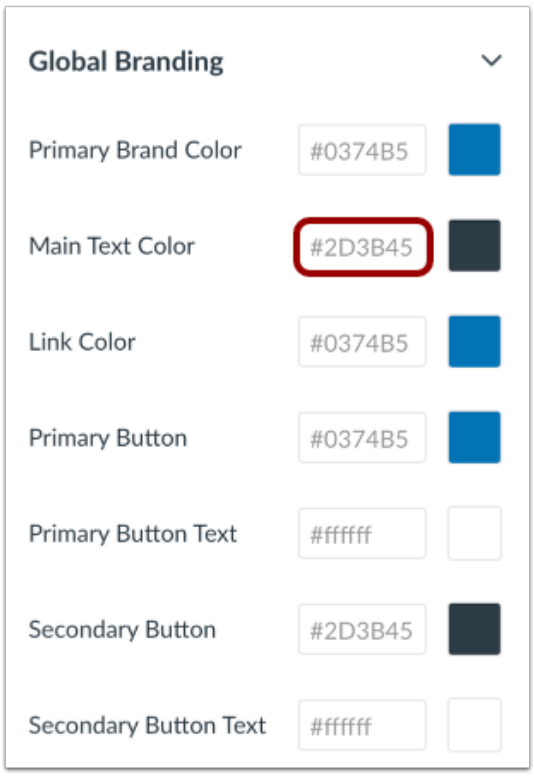
Locate Components



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

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

Select Color via CSS

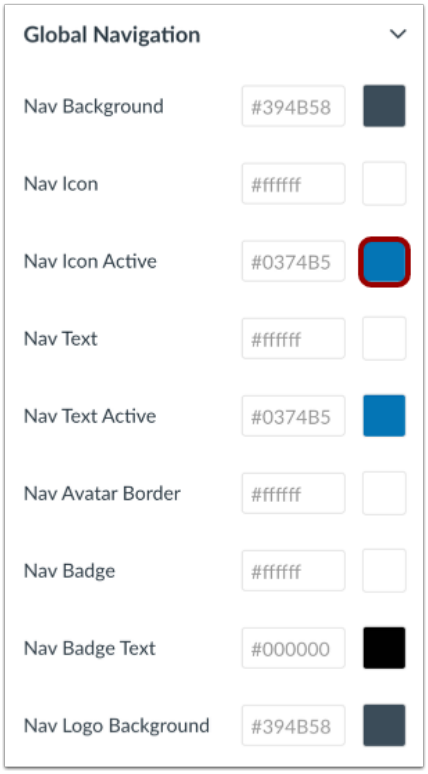


The default value for each component is faded in the text field.

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

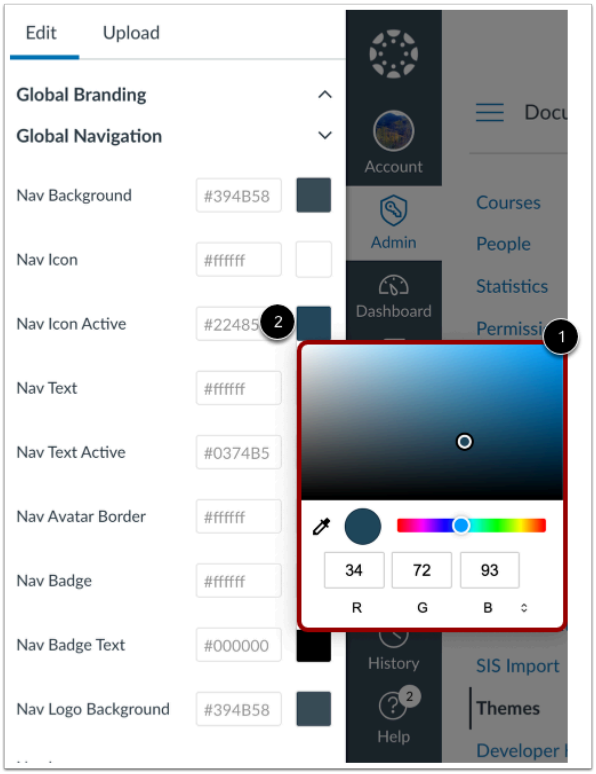
Note: Entered colors will convert and display as hex codes.

Select Color via Color Selector



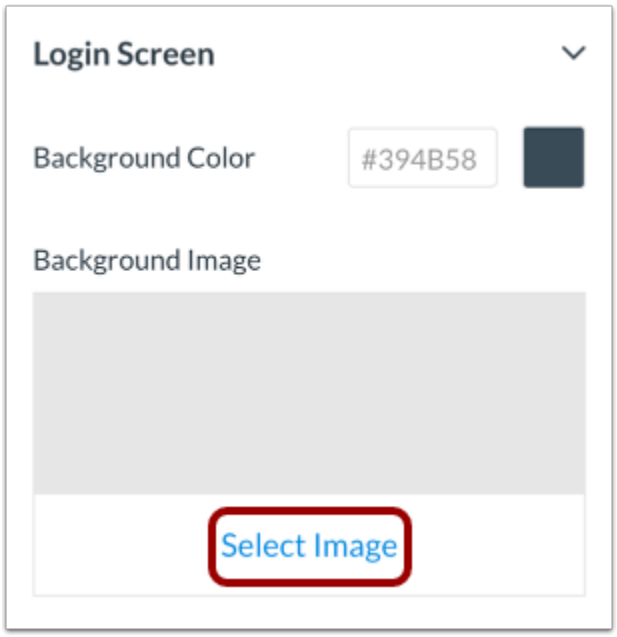
In browsers that support native color inputs, the color selector can be used to choose a value. Locate the component and click the color box. The color selector will appear in a new window.

Select Color



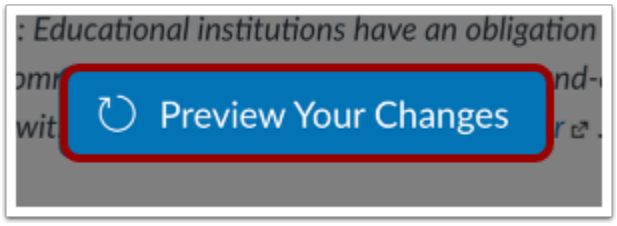
Select a color in the color selector window [1]. Once a color is selected, the component displays the new color in the box [2]. The component's hex color also updates with the new color value.

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.

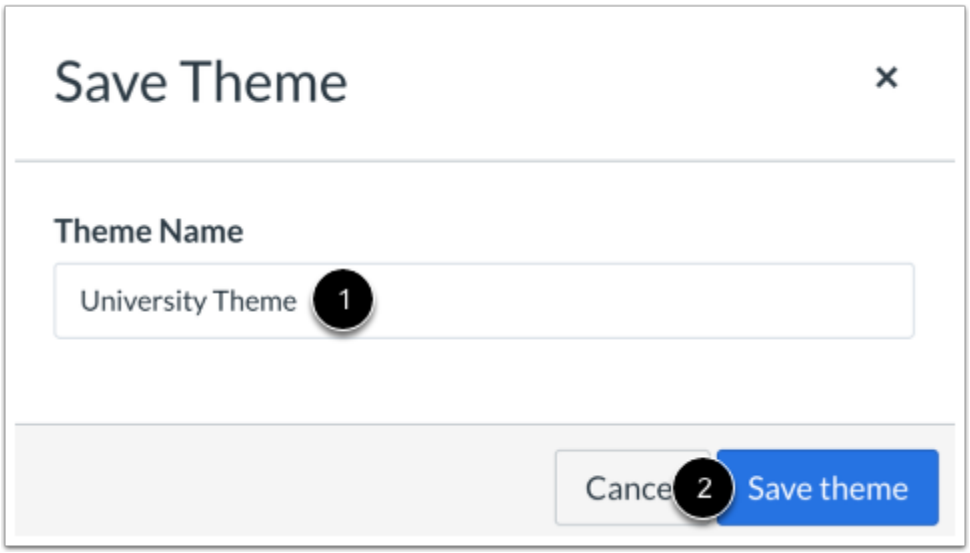
Canvas will generate the preview of the components based on your template changes. If necessary, make additional changes and preview your theme again.

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].

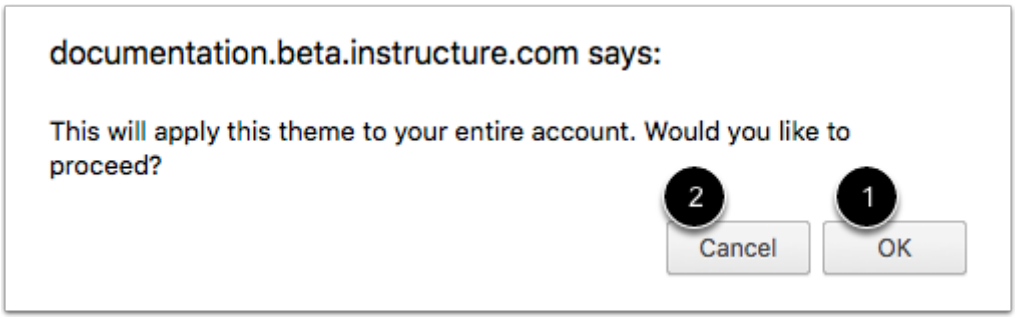
Note: If you edited a previously saved theme, saving the theme overwrites the previous version of the theme and uses the same theme name.

Apply Theme



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

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



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

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

How do I upload custom JavaScript and CSS files to an account?

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

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

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

Before adding custom JavaScript and CSS files, you must contact your Customer Success Manager to enable custom branding for your account and any sub-accounts. Once custom branding is enabled, the option to upload custom CSS and JS files is available in the account and all sub-accounts.

Custom File Risks

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

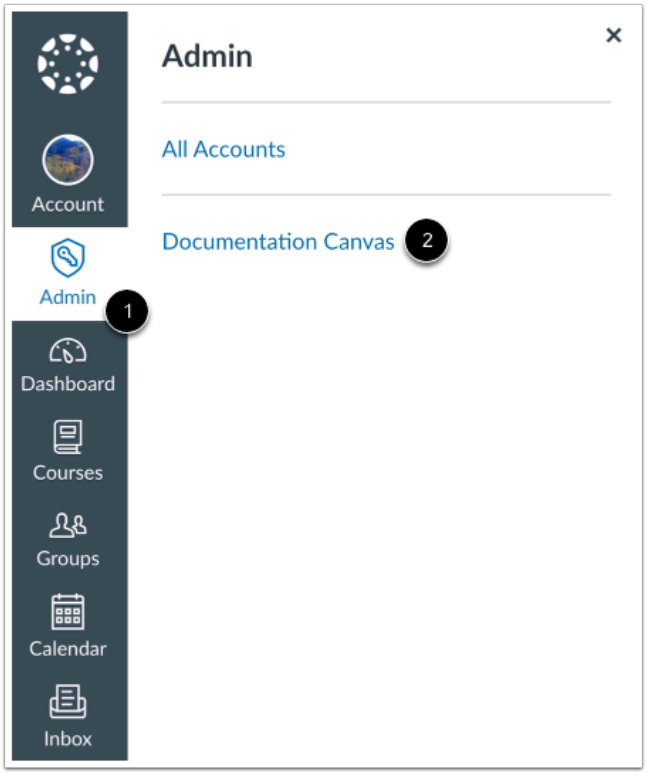
- You should have advanced understanding of JavaScript and CSS and must maintain your own code.
- Custom files may conflict with future changes to the Canvas DOM (eg: element class names or HTML structure) and are therefore not supported. Instructure disclaims any liability for any changes made to your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

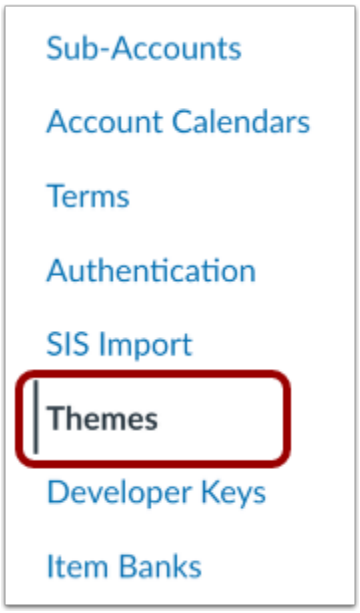
- If you are a sub-account admin and the Themes link is not visible in Account Navigation, Themes has not been enabled for sub-accounts. If the CSS/JS Upload tab is not visible, file uploads have not been enabled for sub-accounts.

Open Account



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

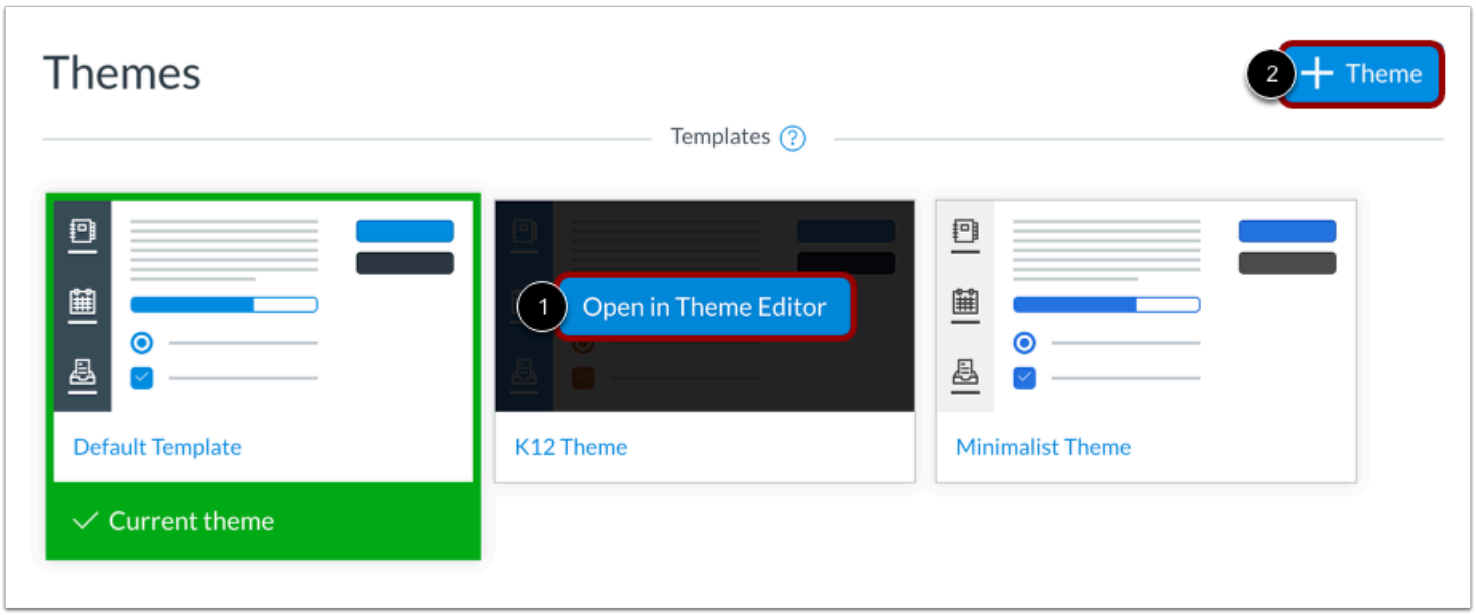
Open Themes



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

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

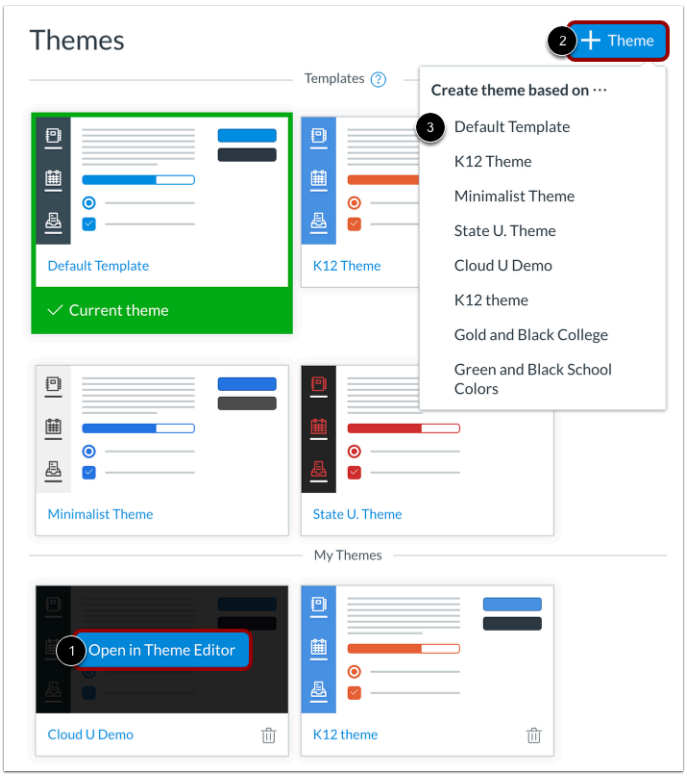
Open Theme Template



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

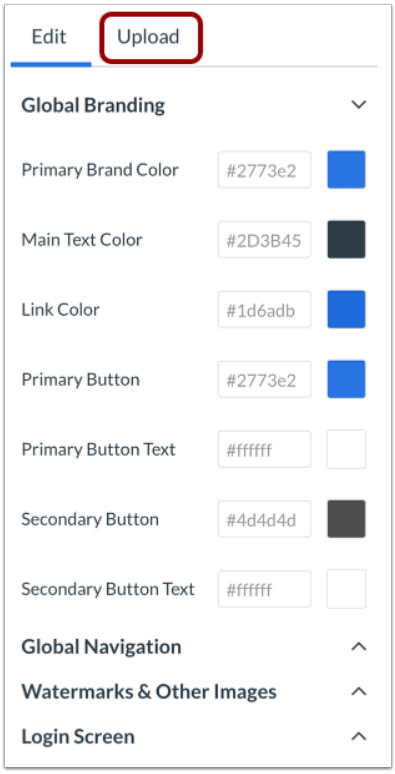
Open Saved Theme



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].

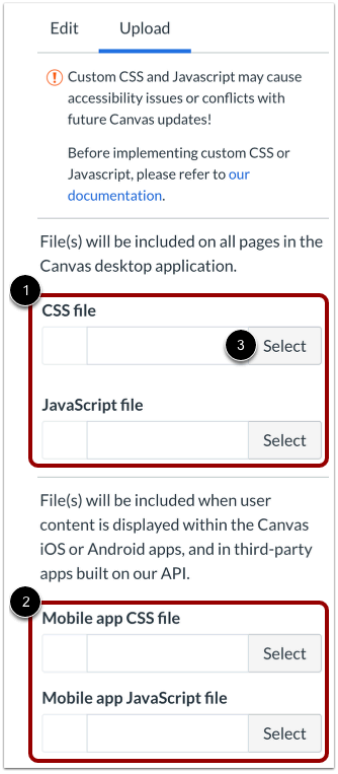
To create a new theme based on a saved theme, click the **Add Theme** button [2] and select the name of the saved theme from the list [3]. This option helps you avoid overwriting your previously saved theme.

Open Upload Tab



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

Upload Custom Files



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.

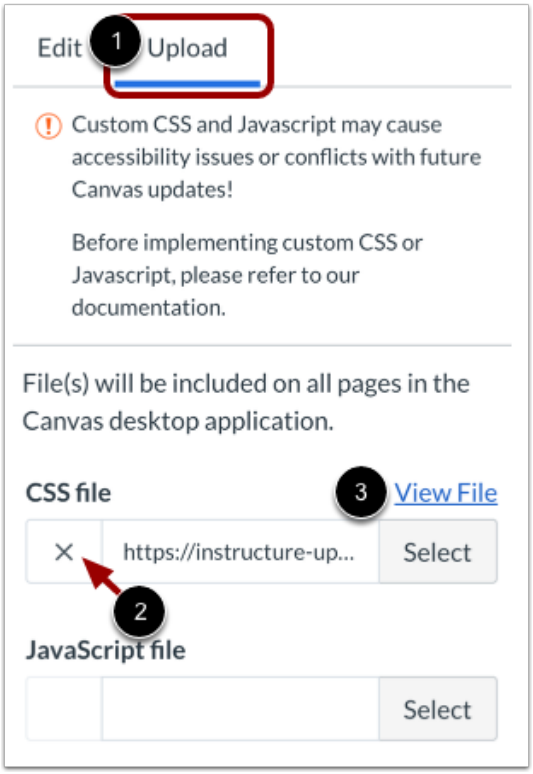
Preview Theme



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.

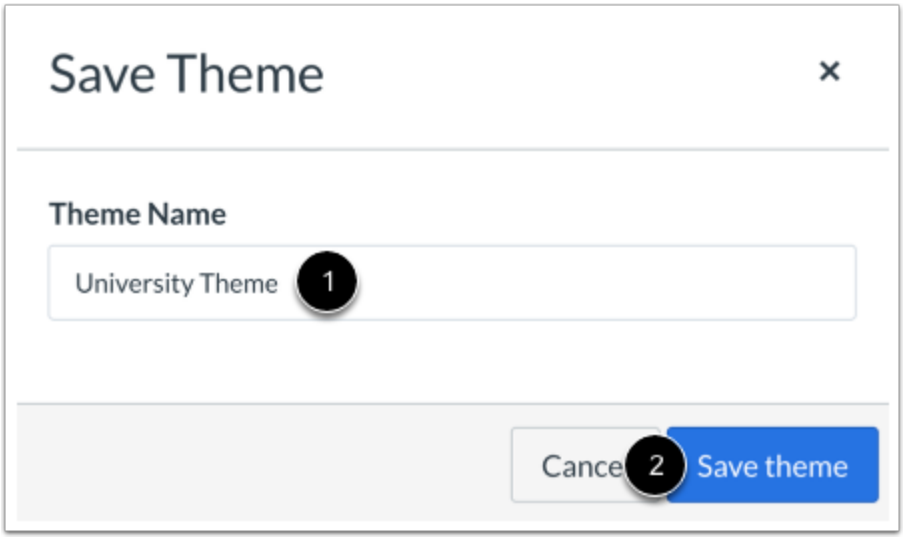
To view the code for your file, click the **View File** link [3]. As the file is stored directly in Canvas, use this link if you ever need to download the file.

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 theme** button [1].

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

Note: If your account allows sub-accounts to customize their own themes, any applicable changes you made will also filter down to any associated sub-accounts. Canvas shows the status of your Theme Editor updates; when the process for each sub-account is complete, the sub-account disappears from the progress window. When all sub-accounts have been updated, the Theme Editor redirects back to the Themes page.

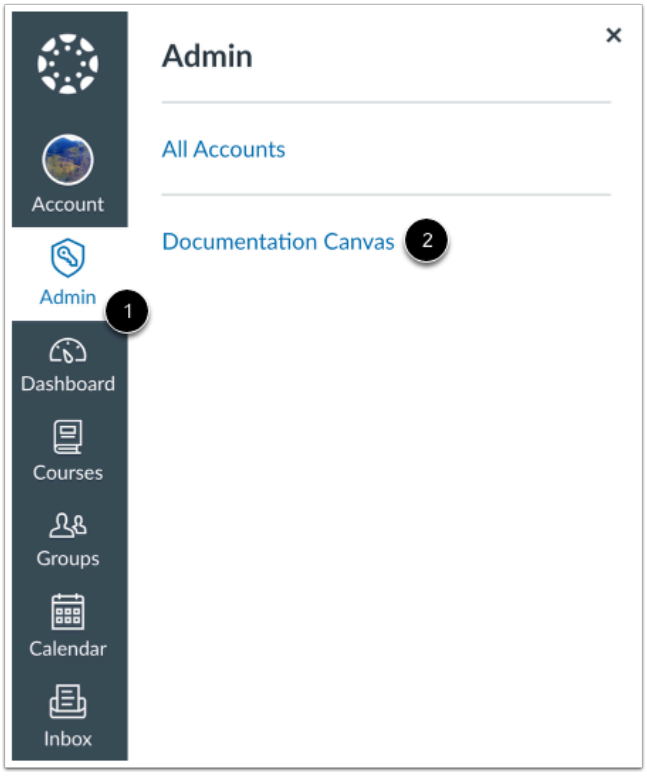
Admin Tools

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

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

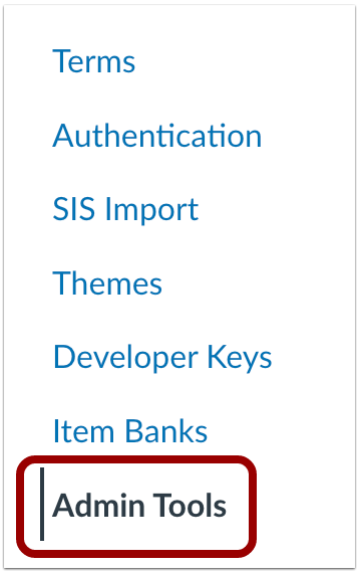
Note: You must talk to your Customer Success Manager to enable this feature before you can use it. After your Customer Success Manager enables the feature, you should enable the View Notifications permission for the appropriate roles.

Open Account



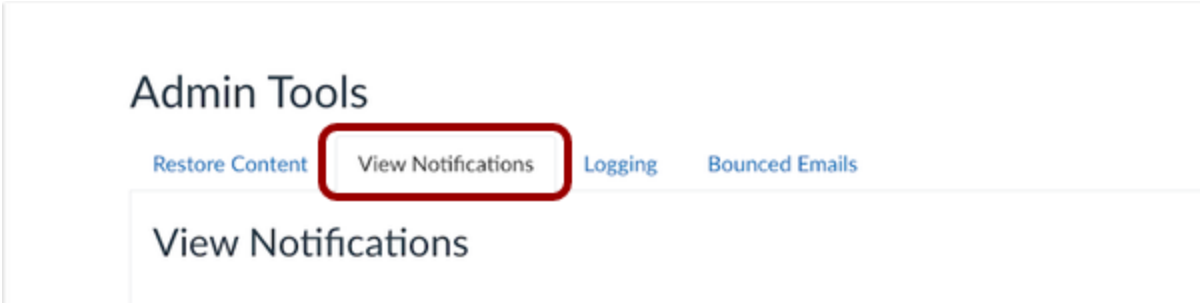
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Admin Tools



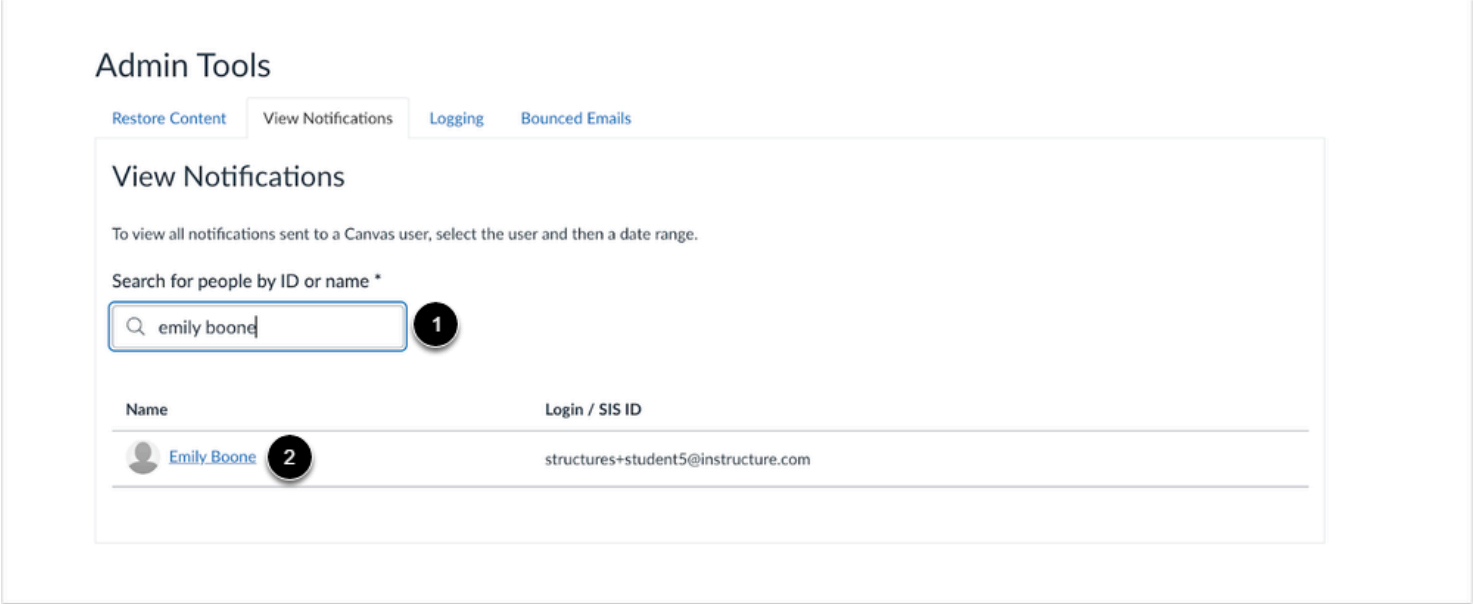
In Account Navigation, click the **Admin Tools** link.

Open View Notifications



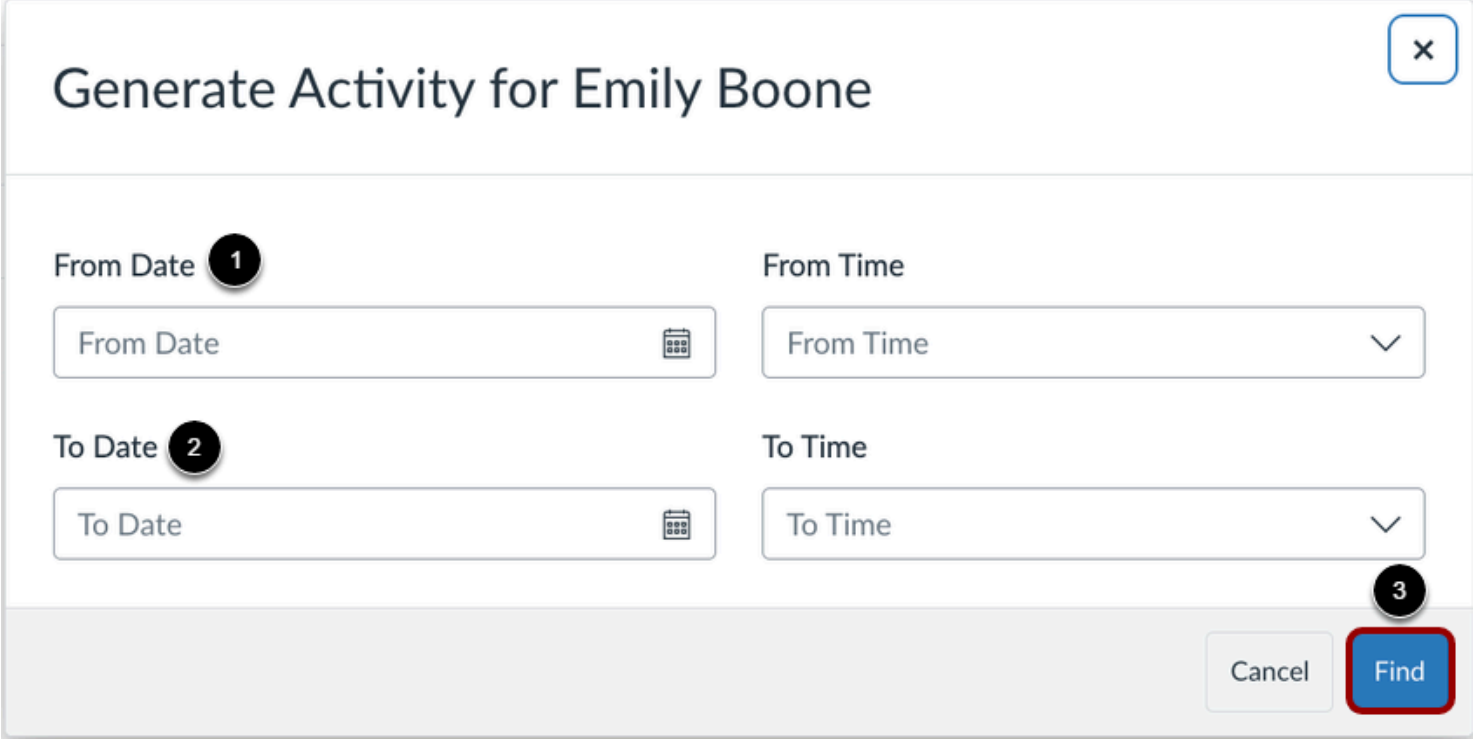
Click the **View Notifications** tab.

Search for Student



In the search field [1], type the name of the student. As you type, the student's name will appear in the list. Click the student's name [2].

Enter Date Range



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

View Notifications Sent to User



View the notifications sent to the user from Canvas.

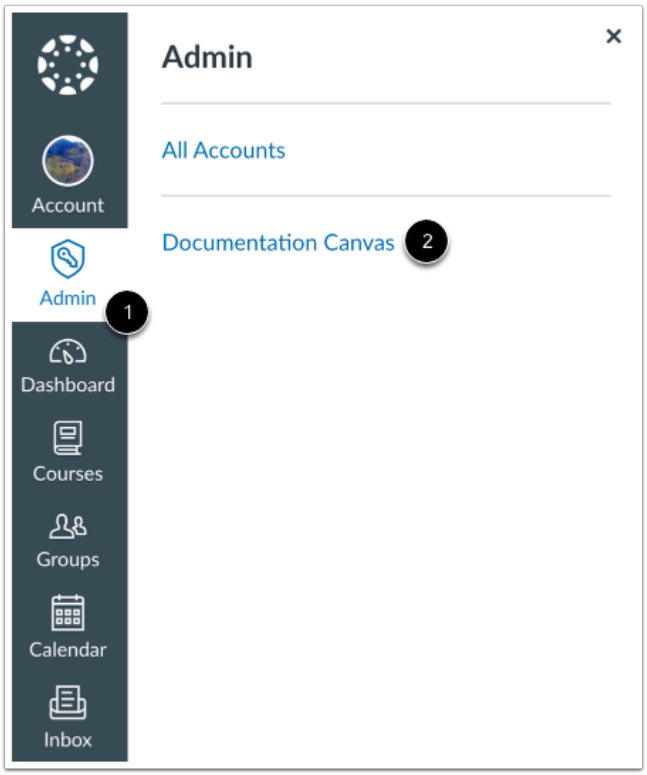
How do I view login and logout activity for a user in an account?

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

Notes:

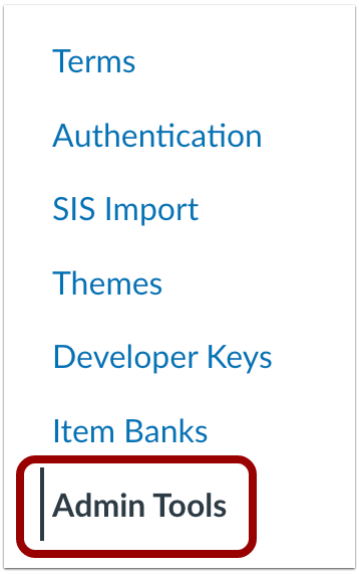
- Canvas will only register a user's logout when the Logout button is clicked in the User Account menu. Closing the browser window does not create a logout request.
- Logging activity will only show activity that took place within the past year.
- Login and logout activity in Admin Tools cannot be viewed by sub-account admins.

Open Account



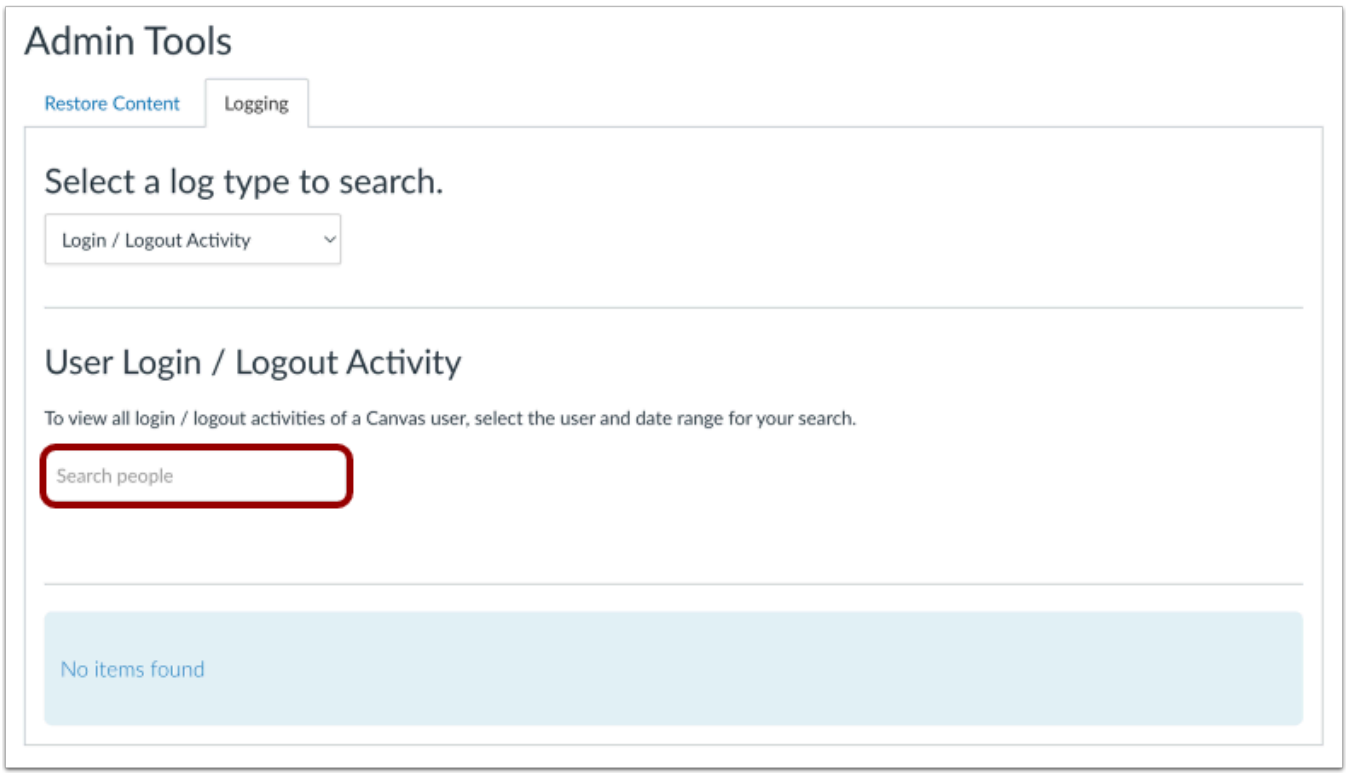
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Admin Tools



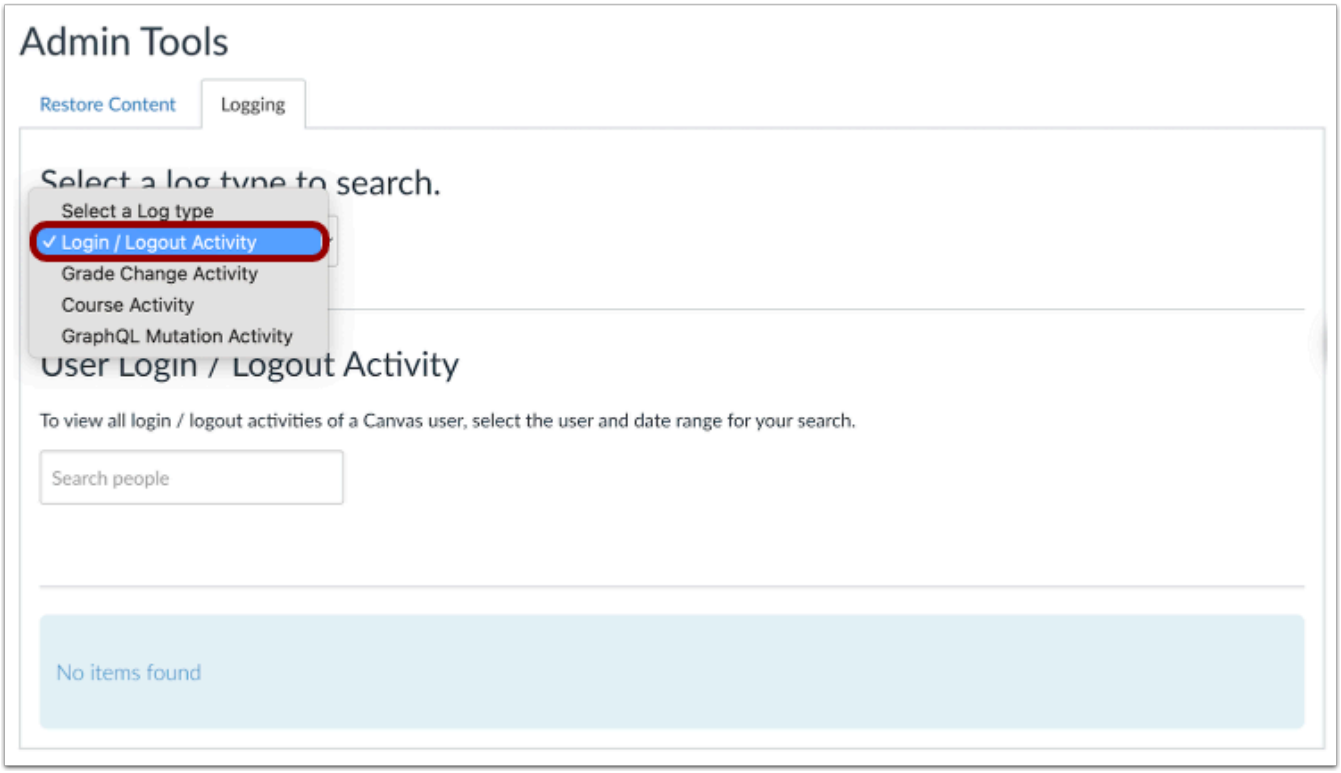
In Account Navigation, click the **Admin Tools** link.

Open Logging



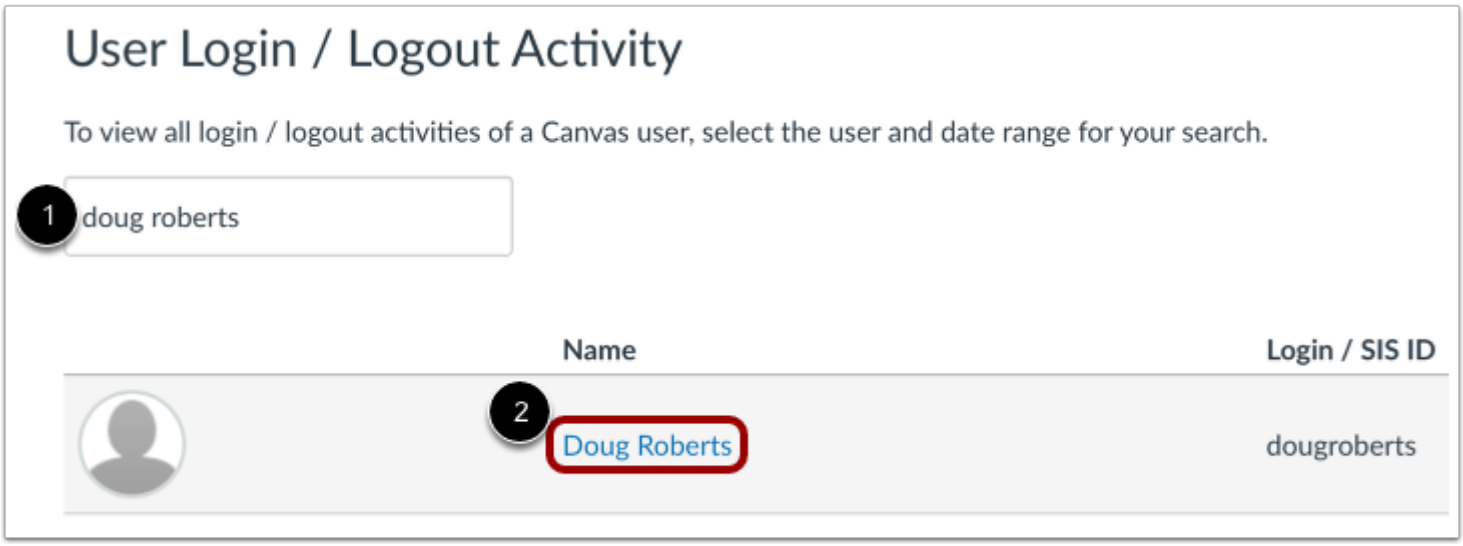
Click the **Logging** tab.

Select Log Type



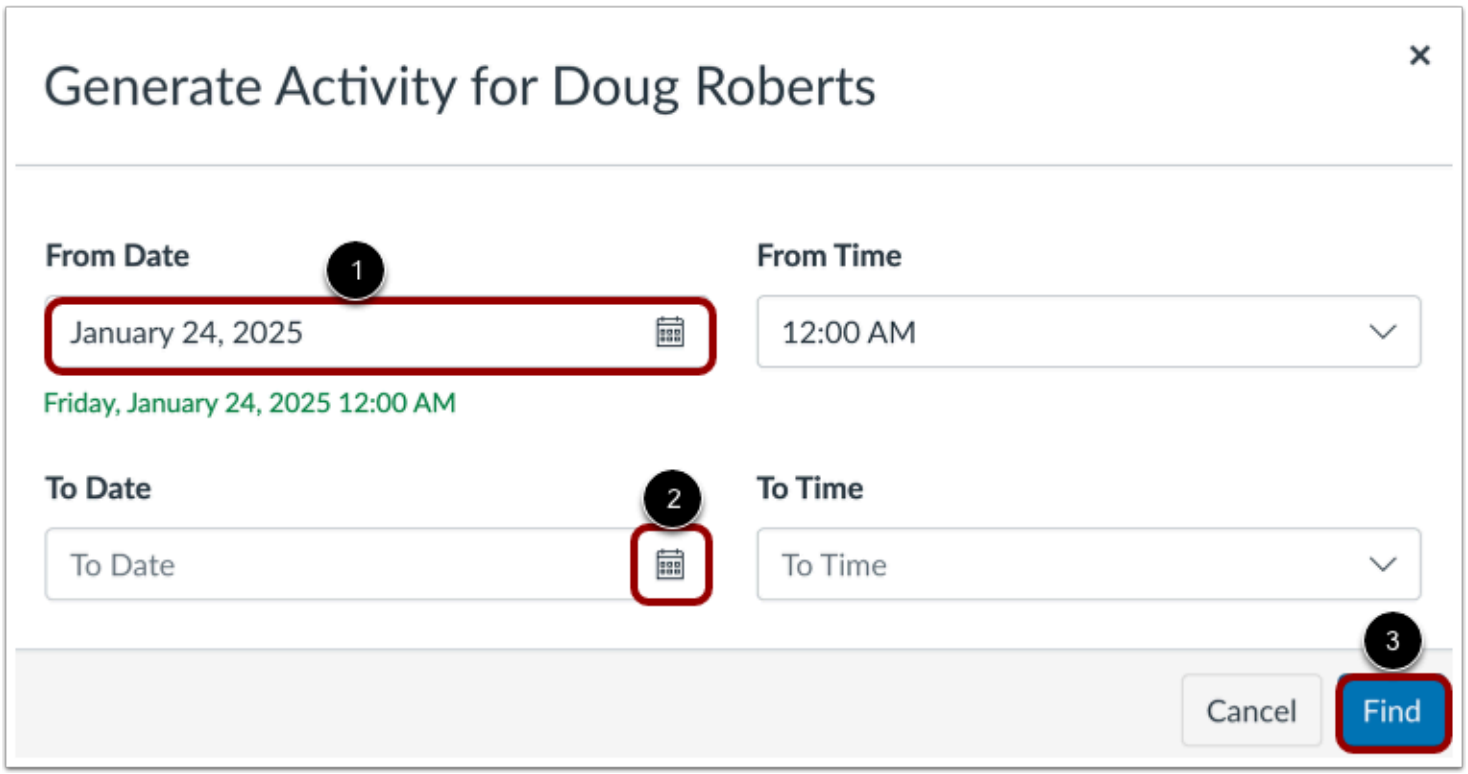
From the log type drop-down menu, select the **Login / Logout Activity** option.

Search for User



Type the name of the user in the search field [1], then click the the user's name [2].

Enter Date Range



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

Find Logging Activity



Click the **Find** button.

View Logging Activity

Date	Time	Activity
Dec 22, 2024	9:41pm	LOGIN
Dec 19, 2024	11:50pm	LOGIN
Dec 18, 2024	12:00am	LOGIN
Dec 11, 2024	10:26am	LOGIN
Dec 9, 2024	10:47am	LOGIN
Dec 8, 2024	8:32pm	LOGIN
Dec 6, 2024	2:48pm	LOGIN
Dec 3, 2024	1:48pm	LOGIN

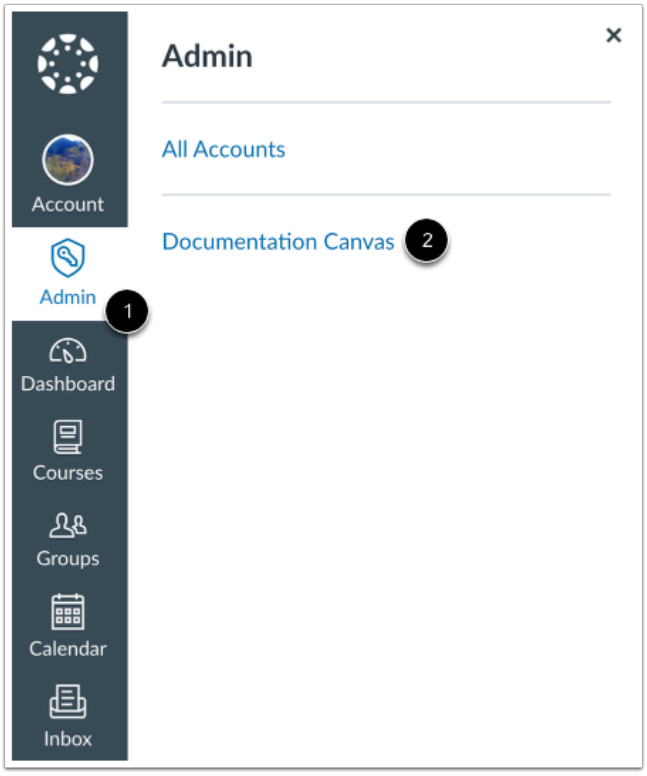
View the login/logout activity for the user.

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. You can view grade changes by grader and by student. You can also view grade change logs for specific courses and assignments using the course and assignment IDs.

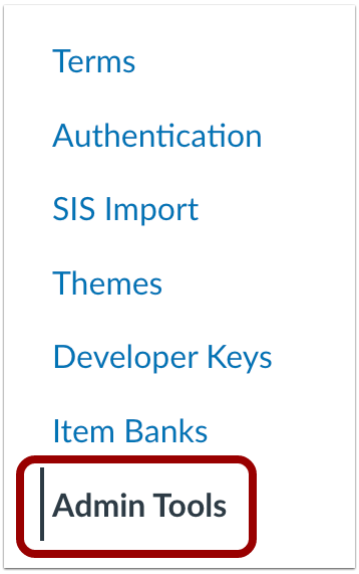
Note: Grade change activity in Admin Tools cannot be viewed by sub-account admins.

Open Account



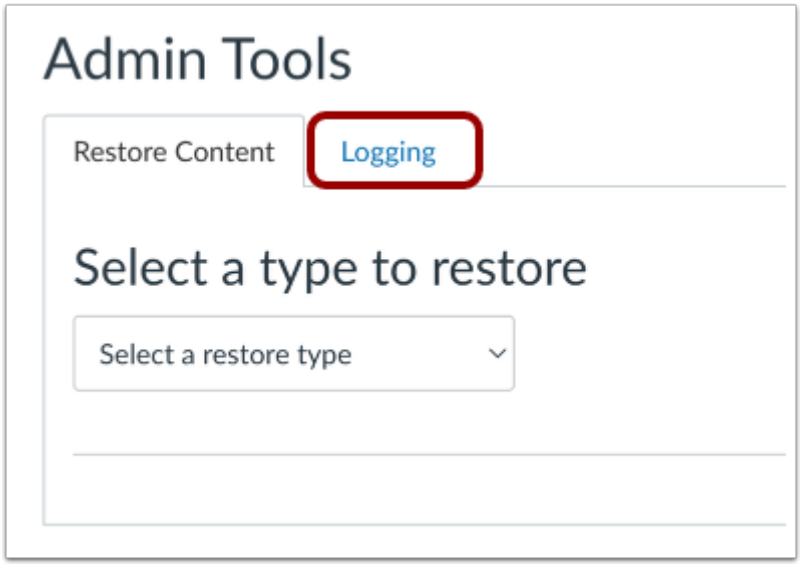
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Admin Tools



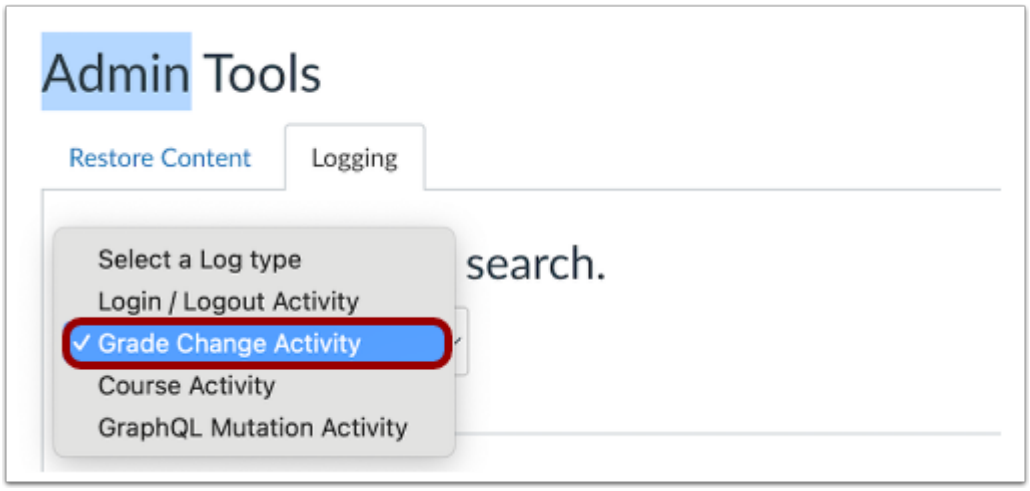
In Account Navigation, click the **Admin Tools** link.

Open Logging



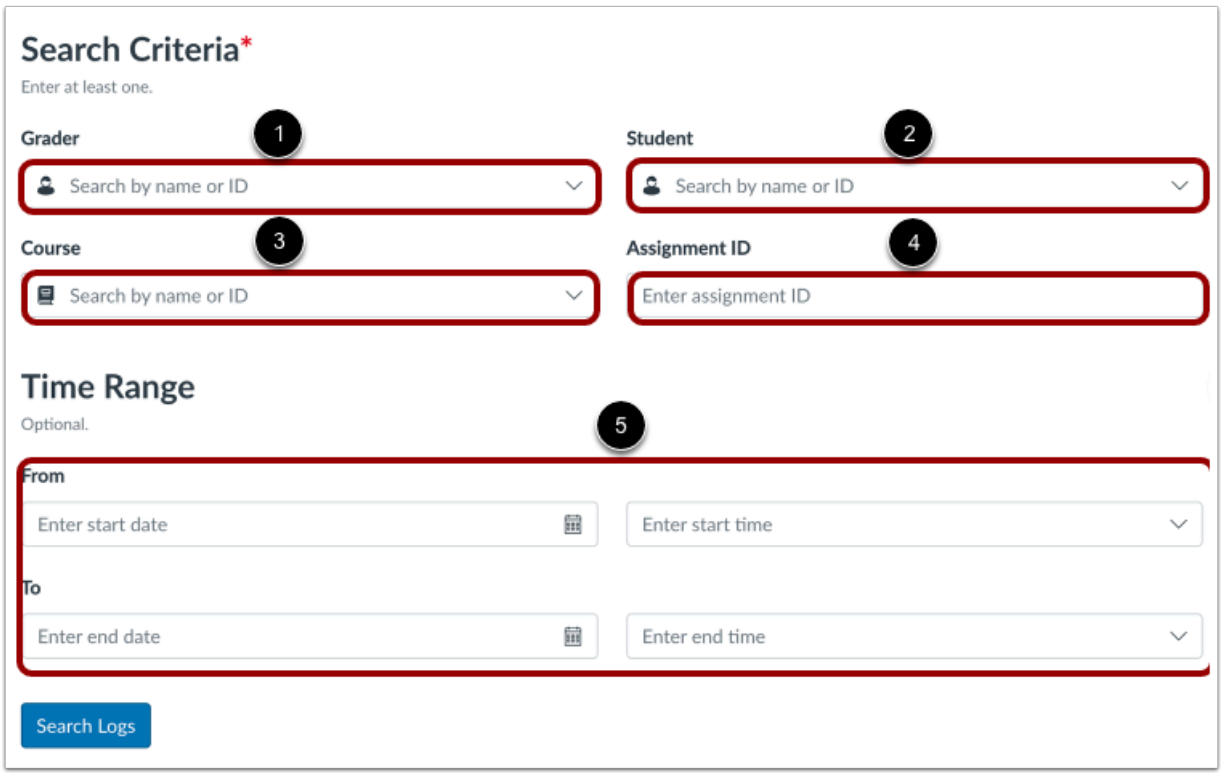
Click the **Logging** tab.

Select Log Type



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

Search for Grade Change



To view grade change activity results, search using one or more search parameters.

Grader [1]: Allows you to search by grader name (e.g. instructor or TA)

Student [2]: Allows you to search by student name

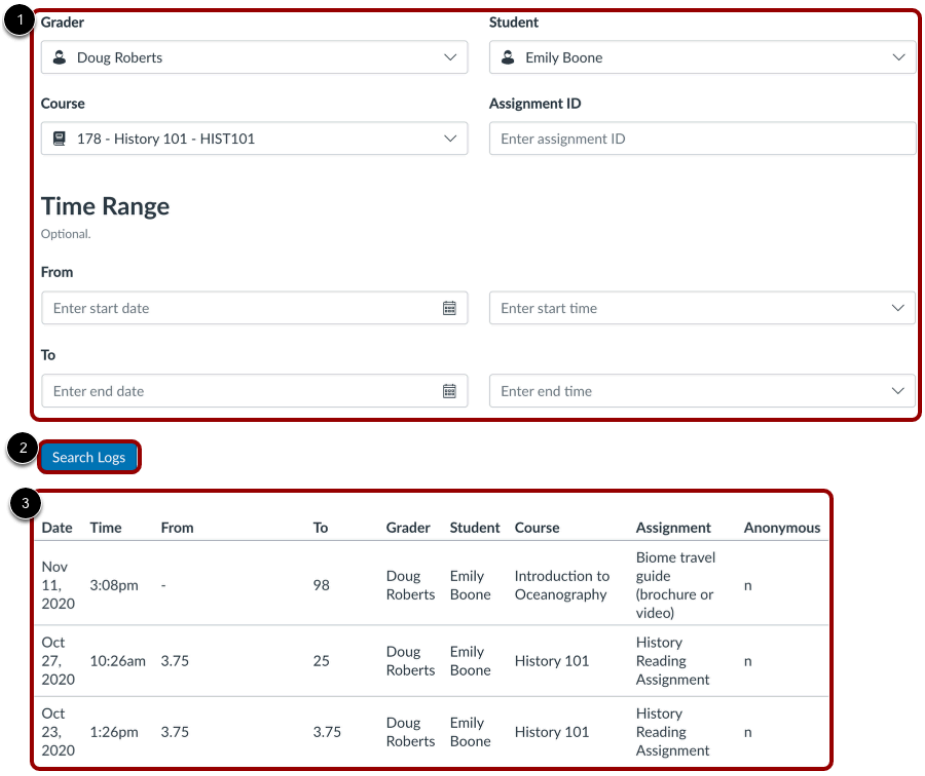
Course ID [3]: Allows you to search by course. You can locate your course id number at the end of your course URL (i.e. canvas.instructure.com/courses/XXXXXX).

Assignment ID [4]: 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).

From/To Date [5]: Allows you to narrow your search parameters by date range.

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

View Grade Change Activity



Enter search criteria in the appropriate field(s) [1] and click the **Search Logs** button [2]. Canvas will display any applicable results for the criteria entered. In the example above, the search generated all activity based on the grader and student [3]. Results include:

- The **Date** the grade was changed
- The **Time** the grade was changed
- The previously assigned grade it was changed **From**; the dash (-) indicates there was no previously assigned grade and an EX indicates the assignment was excused
- The new grade it was changed **To**
- The **Grader** who assigned the grade change
- The **Student** who received the grade change
- The **Course** in which the grade was changed
- The **Assignment** for which the grade was changed
- Whether or not the grader selected the Hide Student Names (**Anonymous**) option in SpeedGrader settings

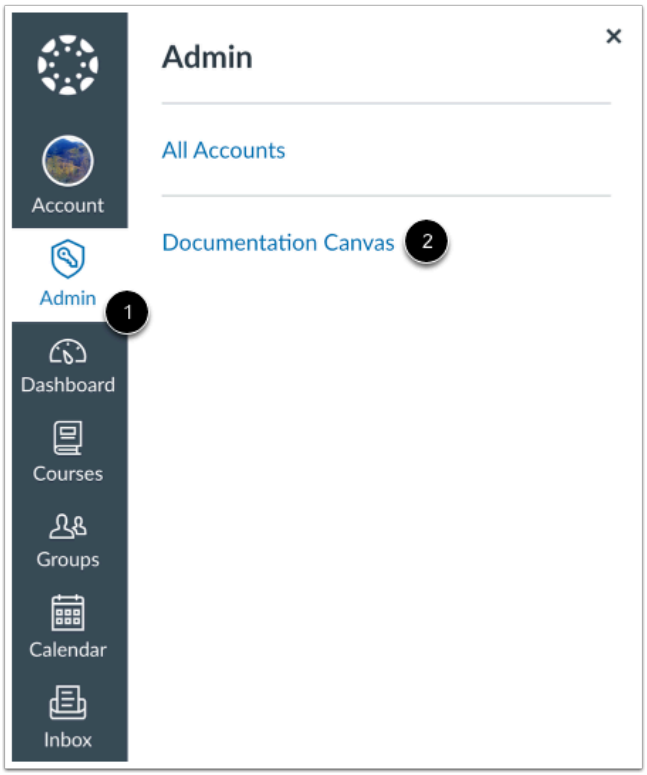
How do I view course activity for an account?

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

Notes:

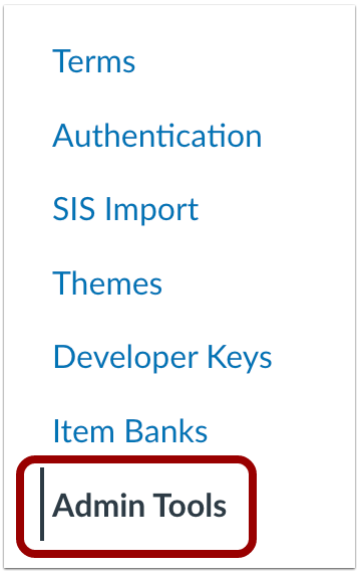
- Course activity in Admin Tools cannot be viewed by sub-account admins.
- Course activity stores course data for up to one year.

Open Account



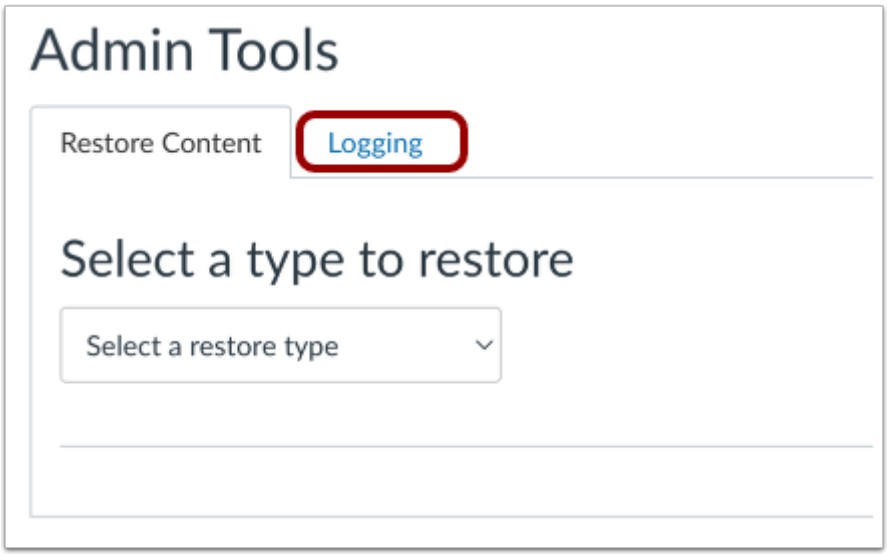
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Admin Tools



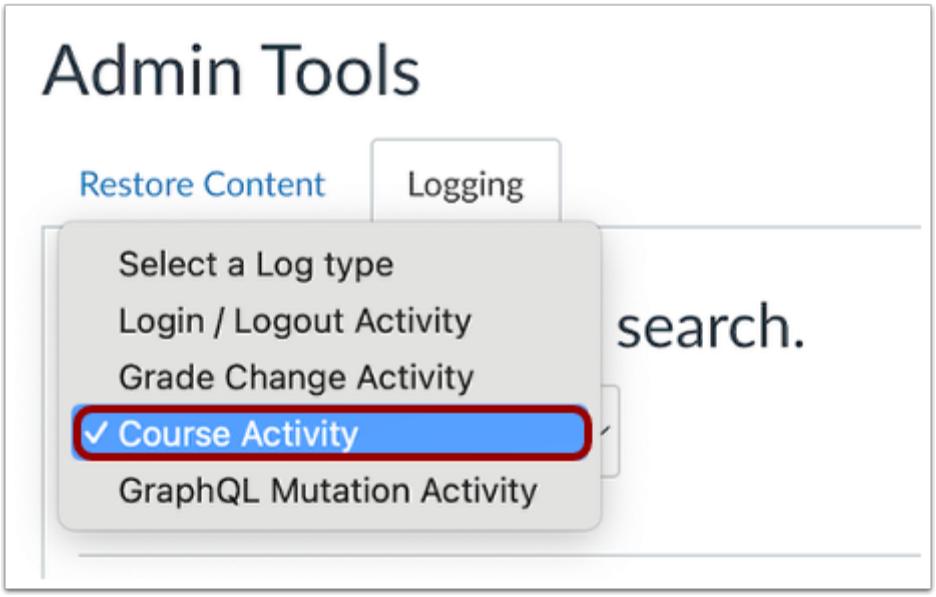
In Account Navigation, click the **Admin Tools** link.

Open Logging



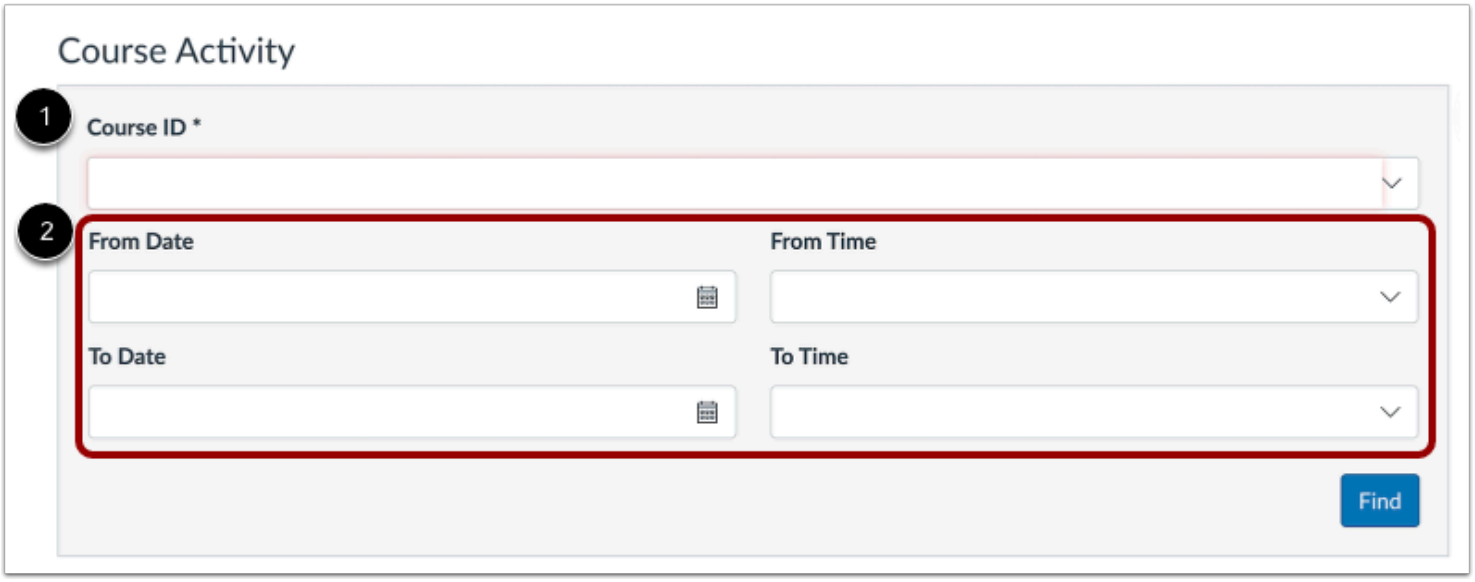
Click the **Logging** tab.

Select Log Type



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

Search by Course Name or Course ID



Search by **Course ID** [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



Click the **Find** button.

View Course Activity

Date	Time	User	Type	Source	Event Details
Sep 25, 2017	5:30pm	Erin Hallmark	Updated	Manual	View Details
Sep 25, 2017	2:13pm	Doug Roberts	Updated	Manual	View Details
Sep 25, 2017	11:51am	Erin Hallmark	Updated	Manual	View Details
Sep 25, 2017	11:50am	Erin Hallmark	Updated	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, copied from, reset to, and reset from)
- The **Source** of the activity (manual or via API)
- The **Event Details** of the activity type (click View Details link)

How do I restore a deleted user or course in an account?

As an admin, you can restore a deleted user, or you can restore a reset or deleted course.

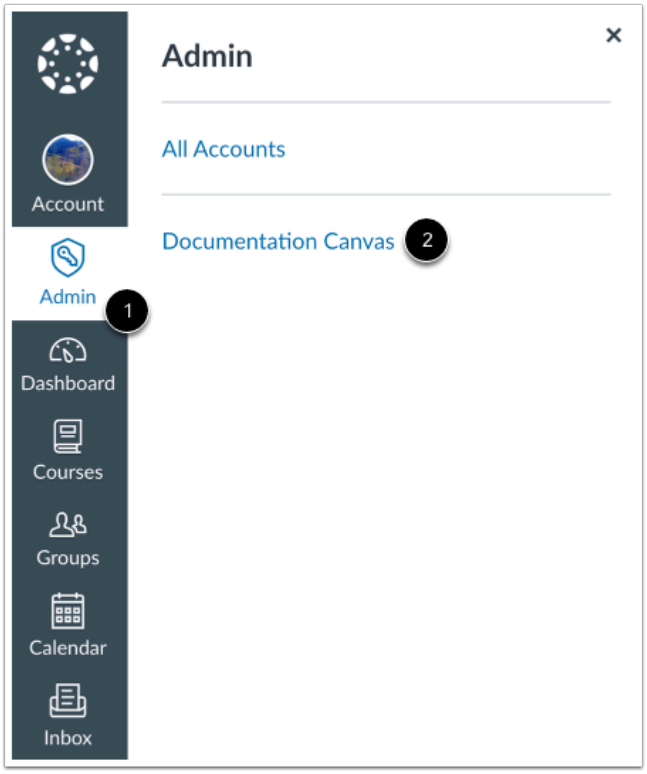
To restore a deleted user, you must know the User ID number to restore the user. To find the User ID, view the number at the end of the browser URL of a page view in the deleted user (e.g. account.instructure.com/users/XXXXXX).

To restore a course that has been reset or deleted, you must know the Course ID number. If your instructor cannot locate the Course ID number, you can access the instructor's user details and look for the Course ID under Page Views. The Course ID is the number at the end of the browser URL of a page view in the deleted course (e.g. account.instructure.com/courses/XXXXXX).

Notes:

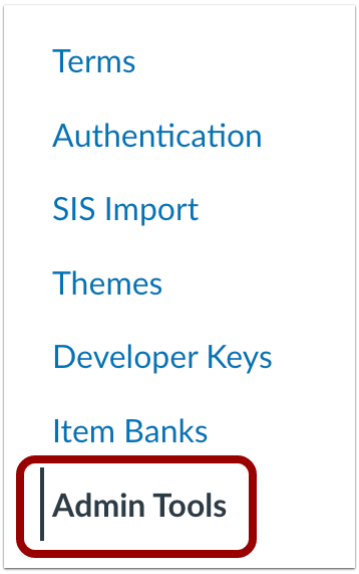
- Using an SIS ID will not restore a course unless the course was deleted via SIS.
- Restoring a course restores the previous course URL and all content. However, enrollments cannot be restored.

Open Account



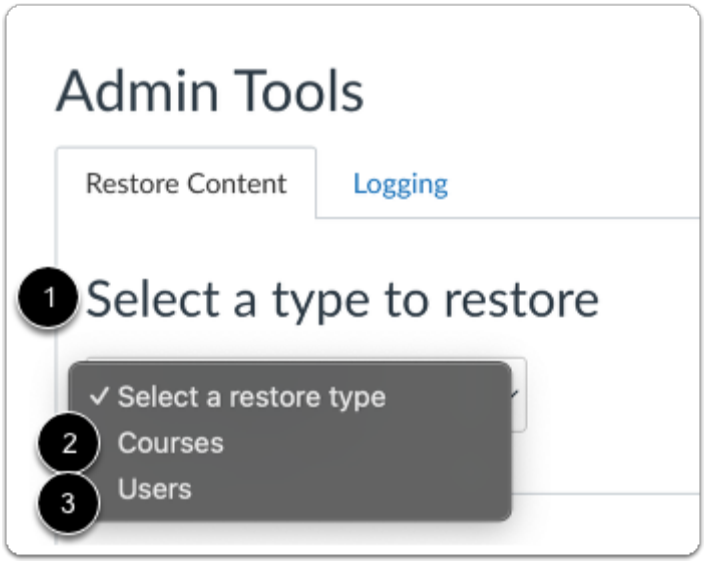
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Admin Tools



Click the **Admin Tools** link.

Select Restore Type

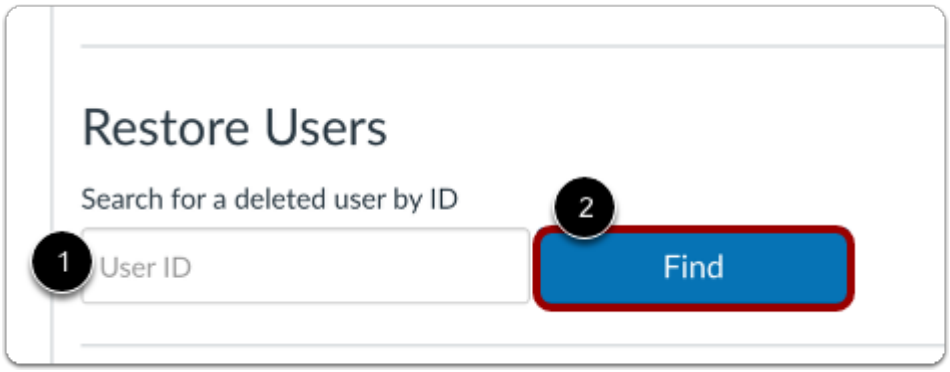


In the Restore Content tab, click the **Select a type to restore** drop-down menu [1].

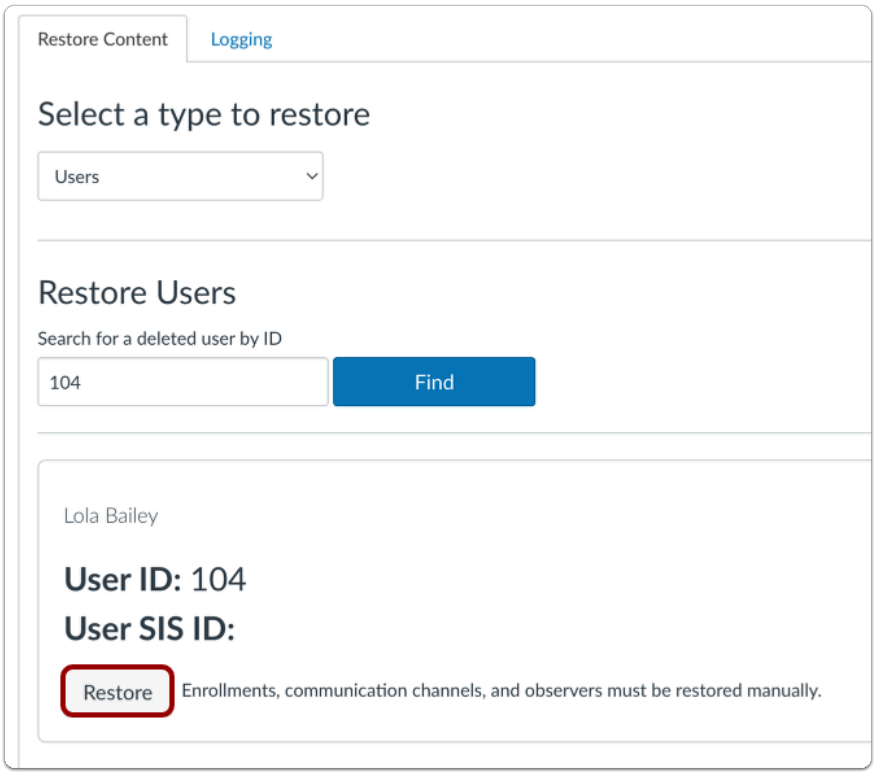
To restore a course, select the **Courses** option [2].

To restore a user, select the **Users** option [3].

Restore Users

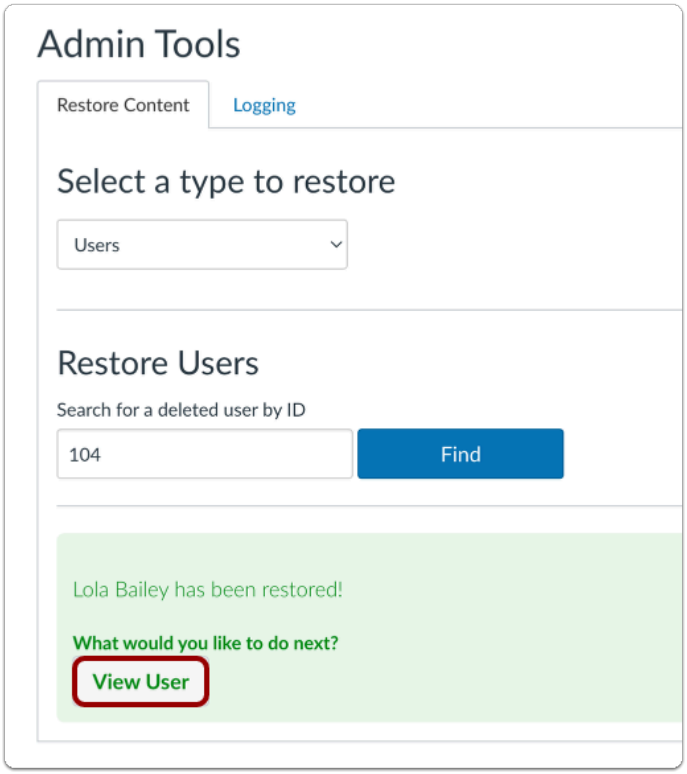


In the **User ID** field [1], enter the user ID of the user you want to restore. Click the **Find** button [2].



When the user is displayed, click the **Restore** button.

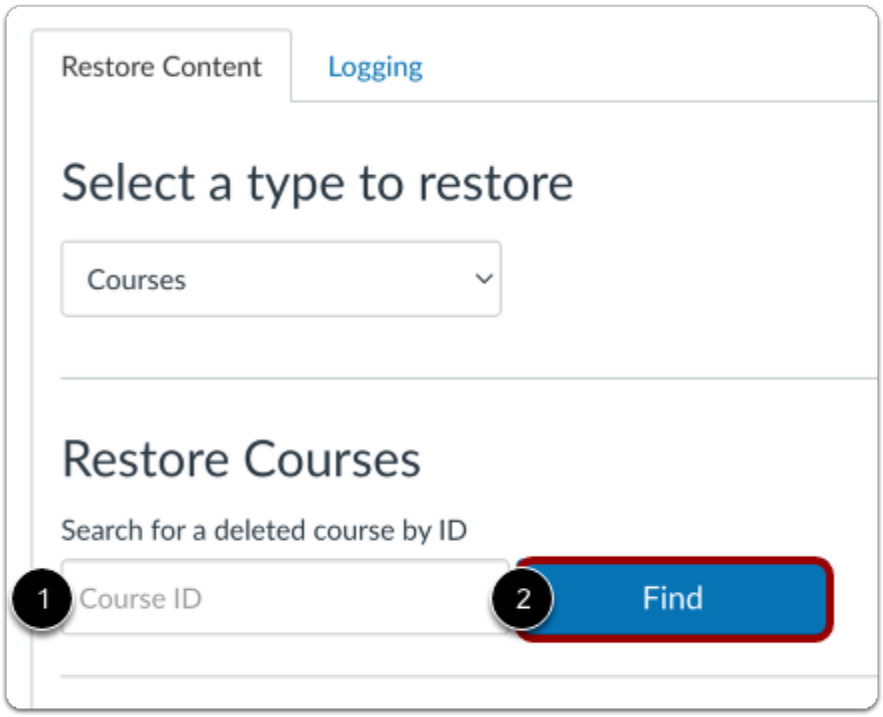
Confirm User Restore



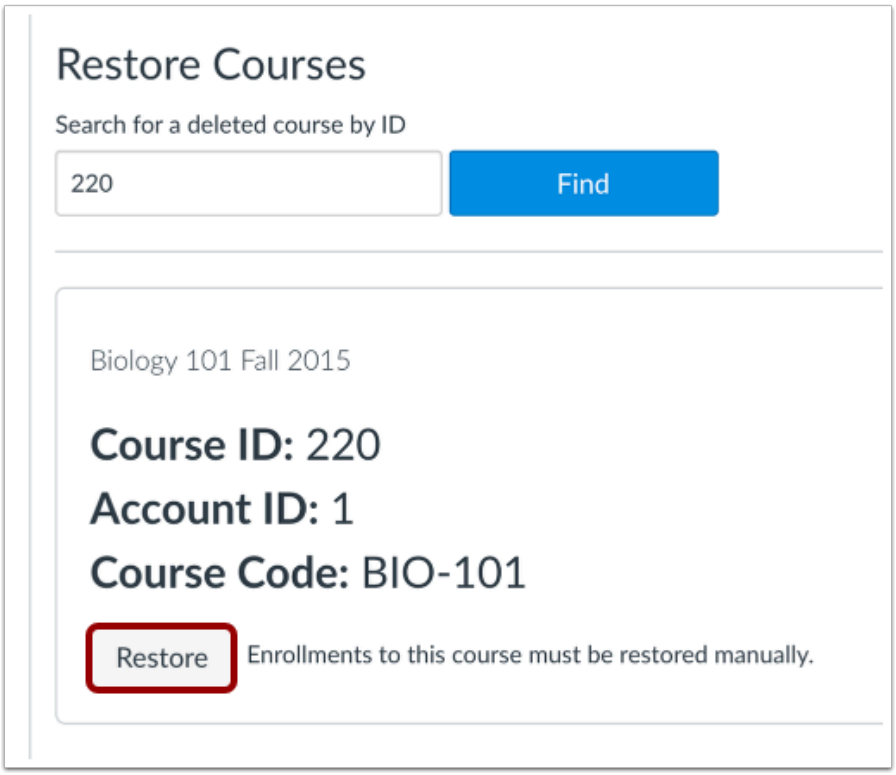
Canvas confirms you have restored your user.

To view the user, click the **View User** button.

Restore Course

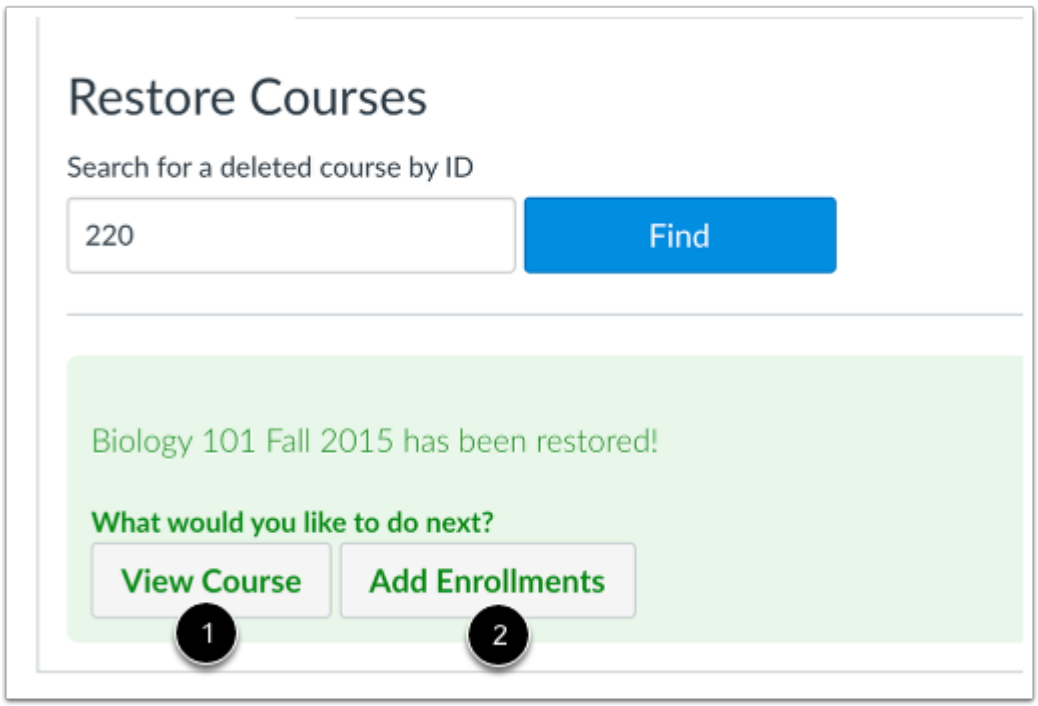


To restore a deleted course, click the **Course ID** field [1]. Enter the course ID of the course you want to restore. Then, click the **Find** button [2].



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

Confirm Course Restore



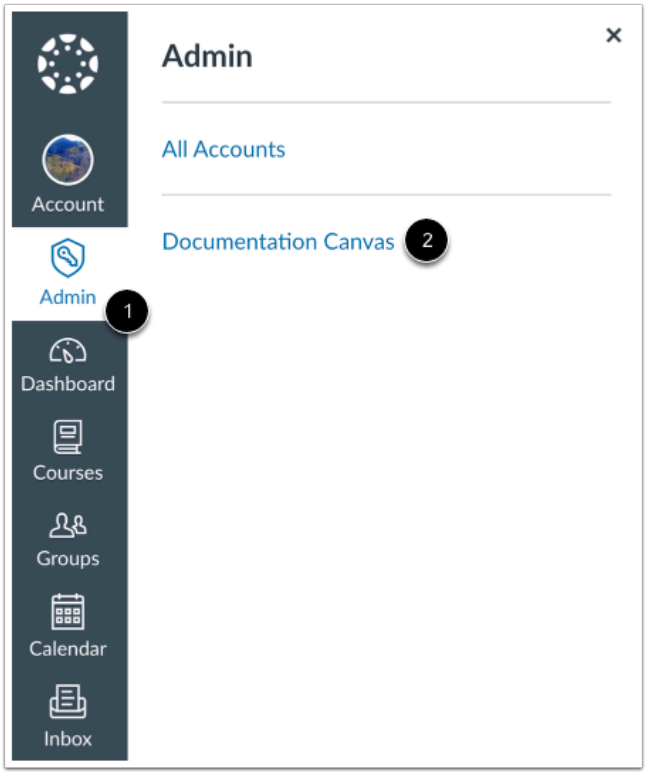
Canvas will confirm you have restored your course.

To view the course, click the **View Course** button [1]. To add user enrollments into the course, click the **Add Enrollments** button [2].

How do I view bounced email notifications for users in an account?

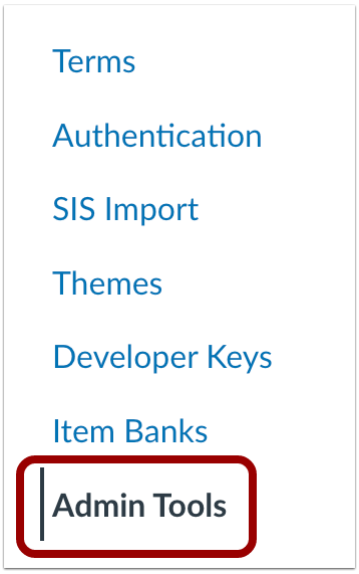
Admins who are allowed to view notifications can access the Bounced Emails tab in Admin Tools. The Bounced Emails tab displays bounced email notifications for all users in an account.

Open Account



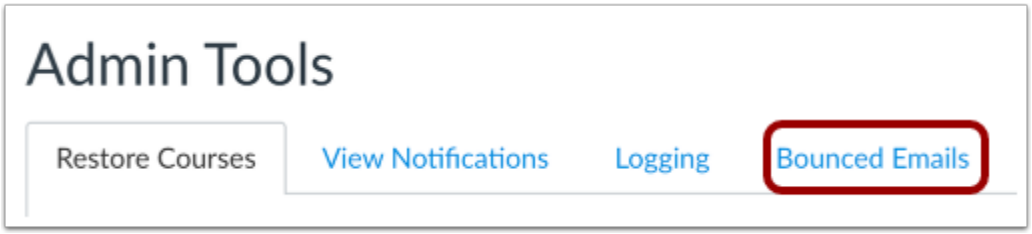
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Admin Tools



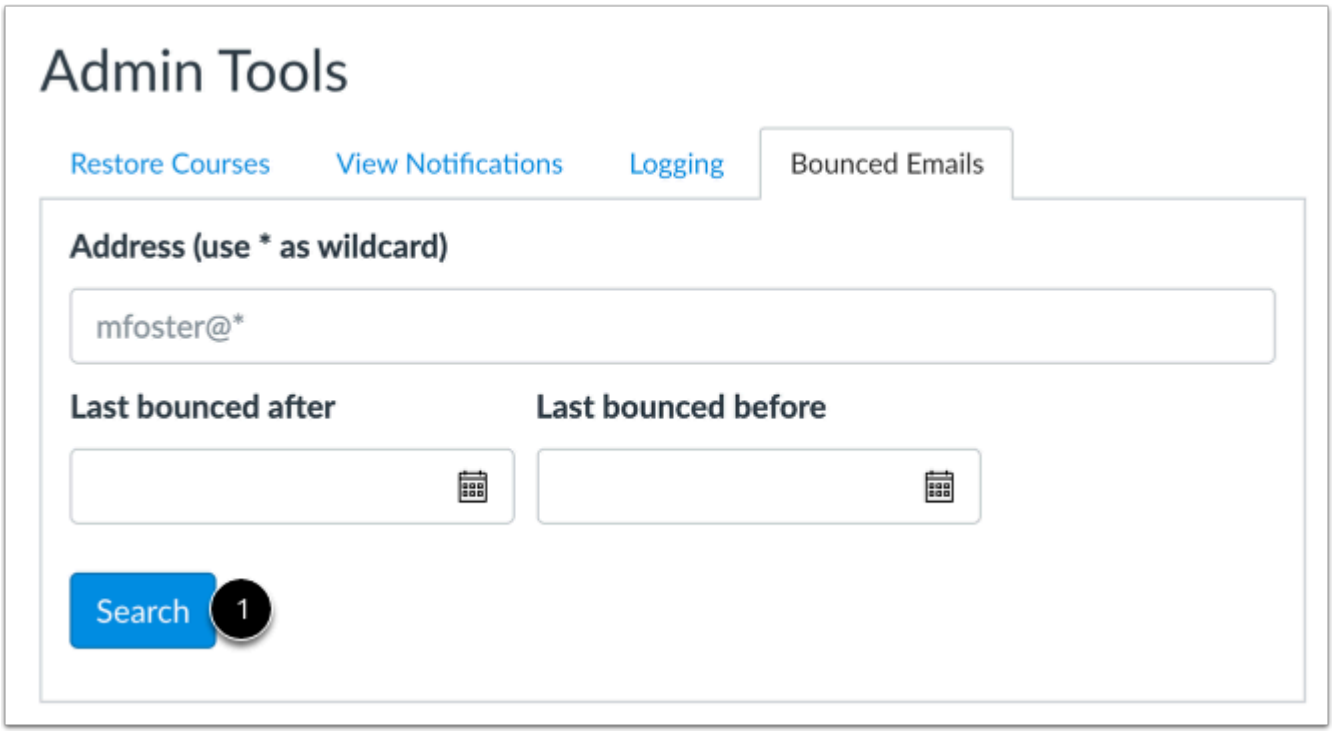
In Account Navigation, click the **Admin Tools** link.

Open Bounced Emails



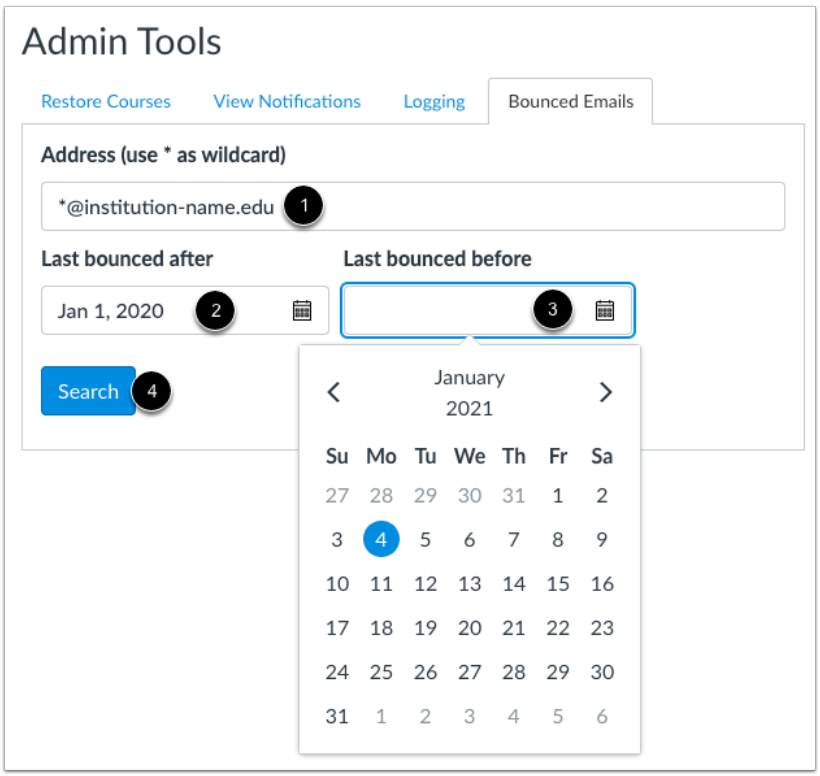
Click the **Bounced Emails** tab.

Search Bounced Emails



To view all bounced email notifications in your account, click the **Search** button [1].

Filter Bounced Emails



To find specific bounced email notifications, you can apply filters to your search. You can filter by user email address and/or date.

To filter bounced email notifications by email address, type an email address in the **Address** field. Wildcards are permitted for both the email username and domain name [1].

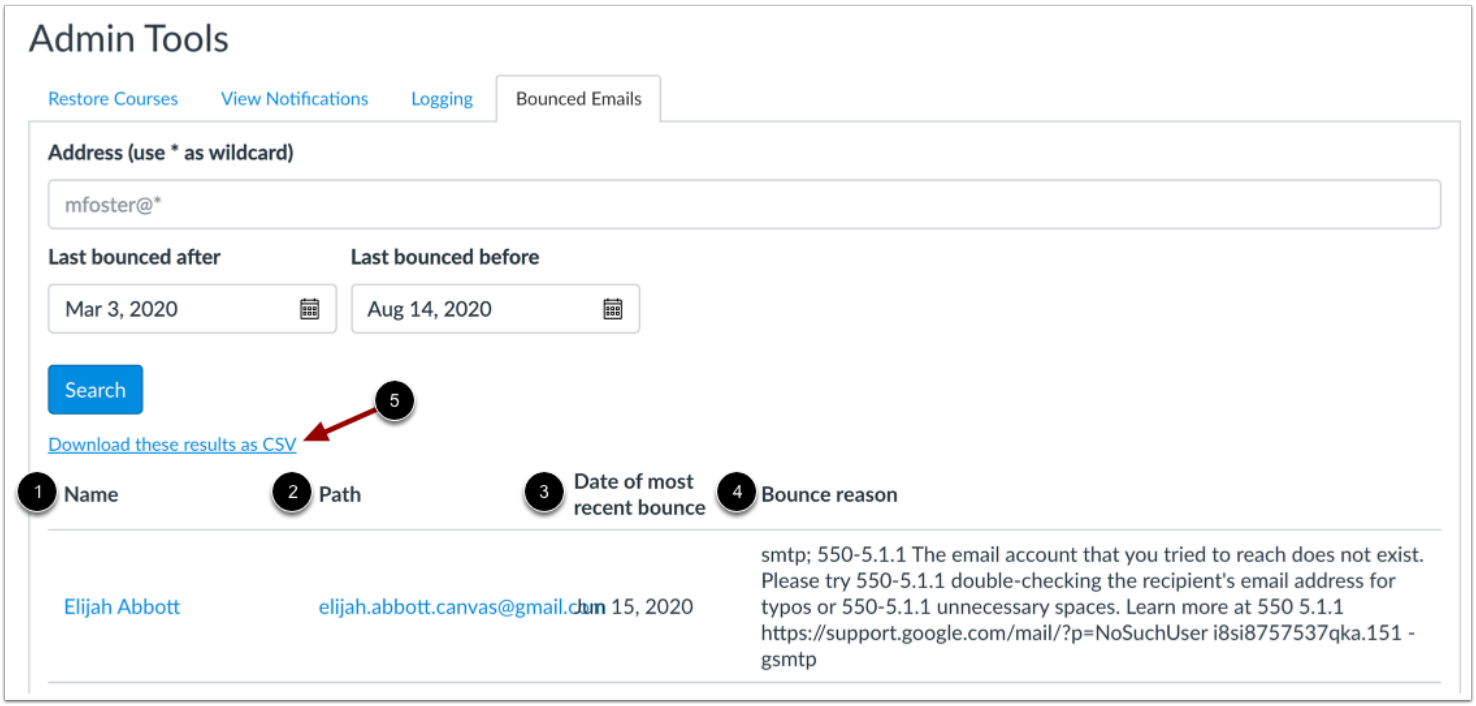
To view bounced email notifications after a certain date, type or select a date in the **Last bounced after** field [2].

To view bounced email notifications before a certain date, type or select a date in the **Last bounced before** field [3].

To view bounced email notifications between specific dates, enter a date in both date fields.

To view bounced email notifications with your selected filters, click the **Search** button [4].

View Bounced Emails



The bounced email notification results display the intended recipient's name [1], the email address [2], the most recent bounce date [3], and the reason the email bounced [4].

To download bounced email results as a CSV file, click the **Download these results as CSV** link [5].

Note: If a user's information is not included in the bounced email results, the user may be listed on the Amazon Web Services (AWS) suppression list. To verify whether a particular email address is on this list and to request removal, reach out to Canvas Support.

Note: Suppressions in our system persist at the account level and are not automatically cleared. Suppressed emails remain on the list indefinitely until they are manually removed.

Admin Analytics

How do I use Admin Analytics?

⚠ Admin Analytics and New Analytics data is pulled from Canvas Data 2 (CD2)/Data Access Platform (DAP).

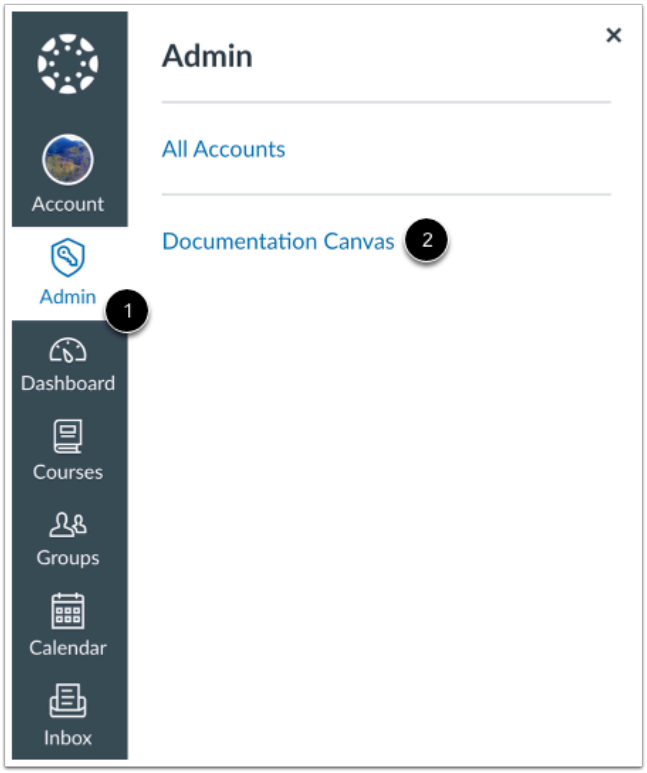
If enabled by your institution, you can use Admin Analytics to view, filter, and download data about Canvas usage.

For more information, visit the Admin Analytics Chart and Data Definitions resource document.

Notes:

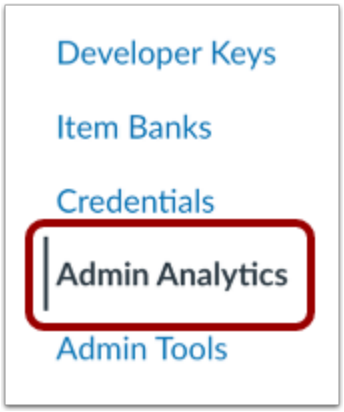
- Admin Analytics is an account feature option.
- To view Admin Analytics data for their sub-account(s), sub-account admins must have the Admin Analytics - View and Export Data permission enabled.
- Admin Analytics provides analytics data about all Canvas courses, including public courses. However, participations and page view data includes only users with student or instructor roles.

Open Account



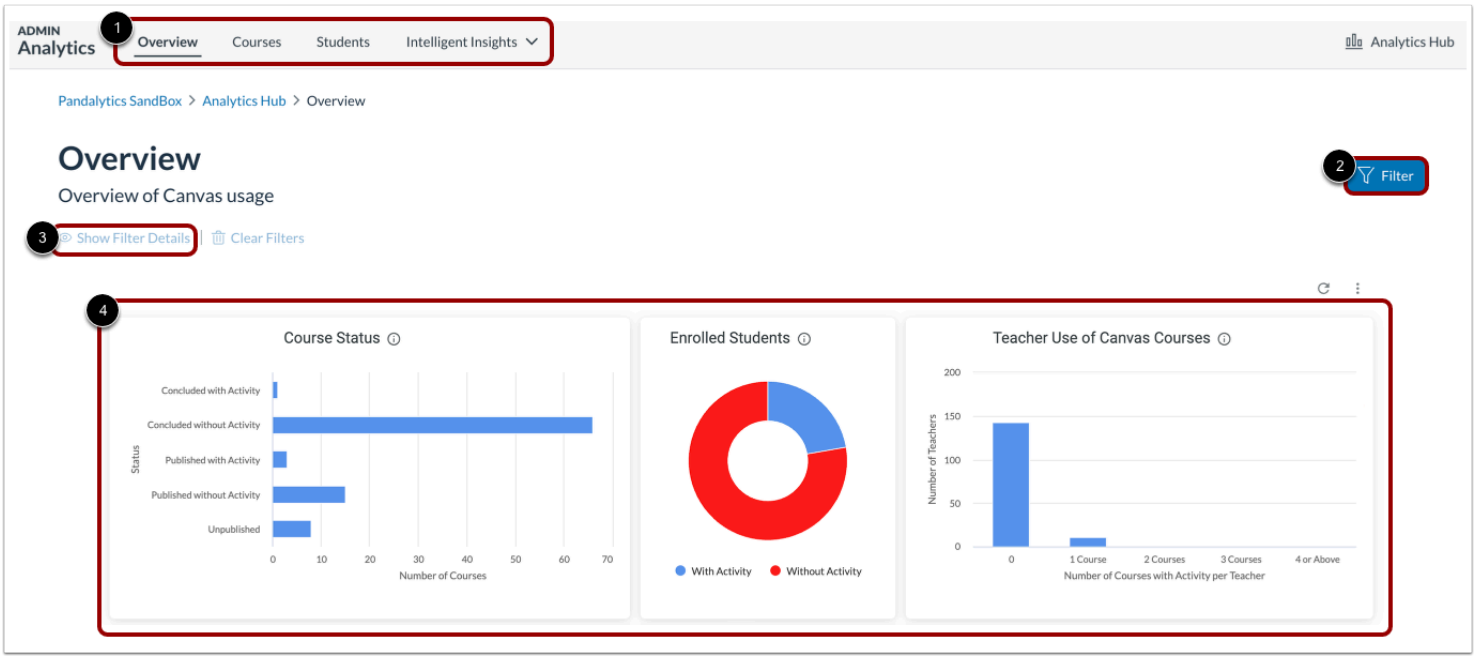
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Admin Analytics



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

View Admin Analytics

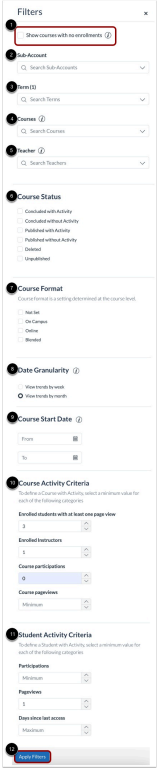


In Admin Analytics, you can view data by dashboard [1], filter data [2], view filter details [3], and view an individual dashboard's data [4].

Notes:

- By default, the Overview Dashboard displays are filtered by the active term.
- In the Admin Analytics navigation, the Intelligent Insights menu only displays for users who have opted into Intelligent Insights.

Apply Filters

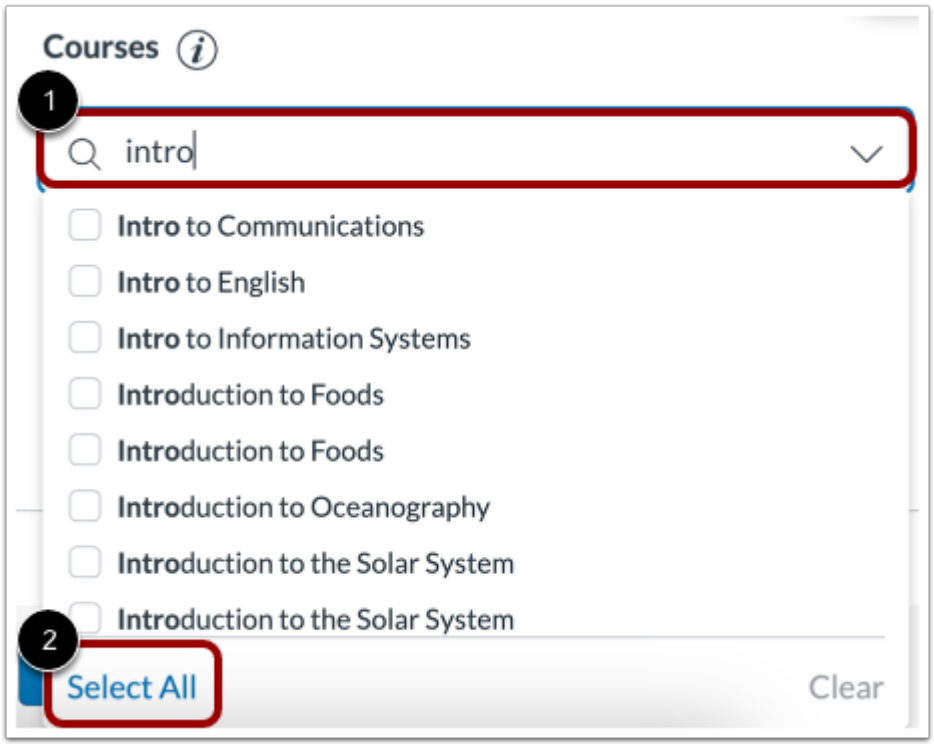


To view courses with no enrollments, click the **Show courses with no enrollments** checkbox [1].

You can filter data using the following menus:

- Sub-Accounts [2]
- Term [3]
- Course [4]
- Teacher [5]
- Course Status [6]
- Course Format [7]
- Date Granularity [8]
- Course Start Date [9]
- Course Activity Criteria [10]
- Student Activity Criteria [11]

To apply the selected filters, click the **Apply Filters** button [12].



To search within a filter menu, enter a search term in the search field [1]. A maximum of 500 search results are returned.

To select all of the results, click the **Select All** link [2].

View Dashboards



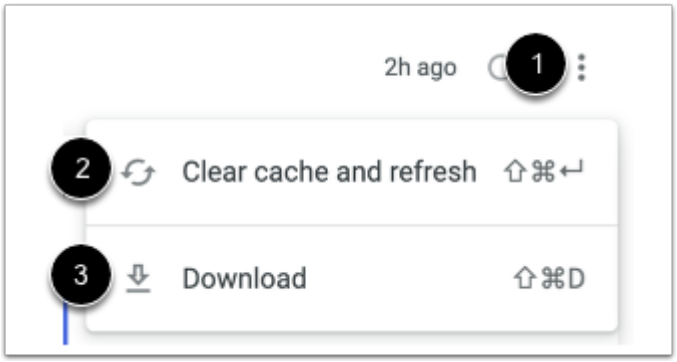
In Admin Analytics, you can view data via the Overview, Course, and Student Dashboards.

- Overview Dashboard [1]: displays account courses by status, student and teacher engagement data, various data over a given time, and average course grades.
- Course Dashboard [2]: displays course grade and engagement statistics, feature use data, courses with low average grades, and courses with low student activity.

- Student Dashboard [3]: displays student grade and engagement statistics, grade averages, submissions by status, and student details [3].

You can also manage statistic and chart data.

Refresh Cache and Download Analytics



To refresh your dashboard's cache, click the **Options** icon [1], then click the **Clear cache and refresh** link [2].

To download a summary of the dashboard you are viewing on your computer, click the **Download** link [3].

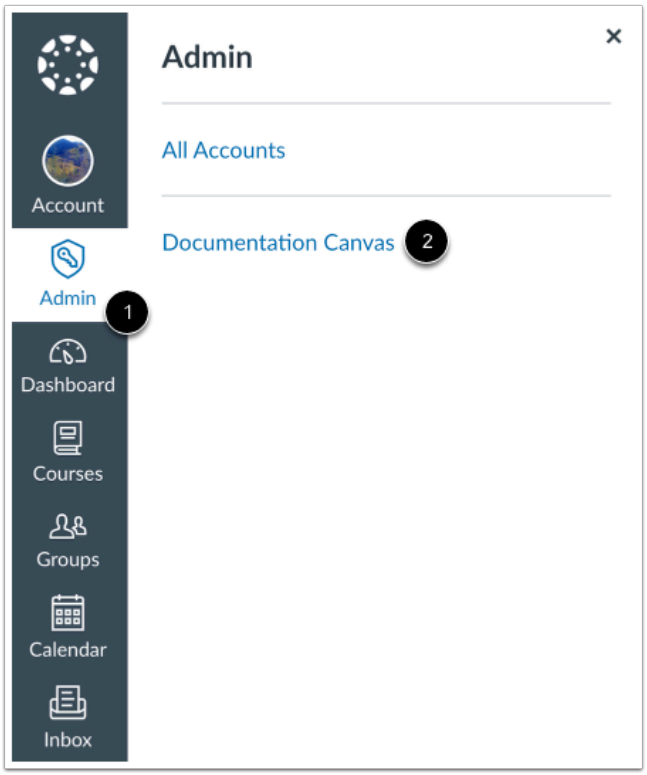
How do I view the Admin Analytics Overview Dashboard?

If enabled by your institution, you can use Admin Analytics to view, filter, and download data about Canvas usage.

In the Overview Dashboard, you can view account courses by status, student and instructor engagement data, various data over a given time, and average course grades. You can also view course and student-specific data in the Course Dashboard and Student Dashboard respectively.

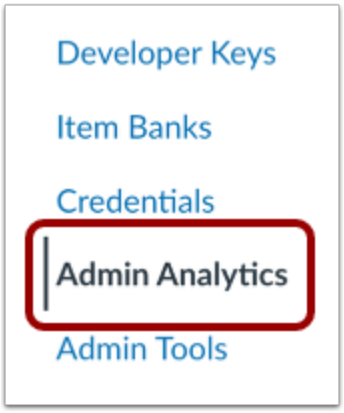
For more information, visit our about dashboard charts and statistics.

Open Account



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

Open Admin Analytics



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

Open Overview Dashboard



By default, the **Overview Dashboard** displays filters by active term.

View Overview Dashboard



In the Overview Dashboard, you can view the following charts:

- Courses by status [1]
- Enrolled students with or without activity [2]
- Teacher use of courses with activity [3]
- Average course grades [4]
- Interactions by Canvas feature [5]
- Overall course interactions over time [6]

For more information, visit our guide on viewing and managing statistics and chart data.

Note: All statistics and charts display data based on the selected filters.

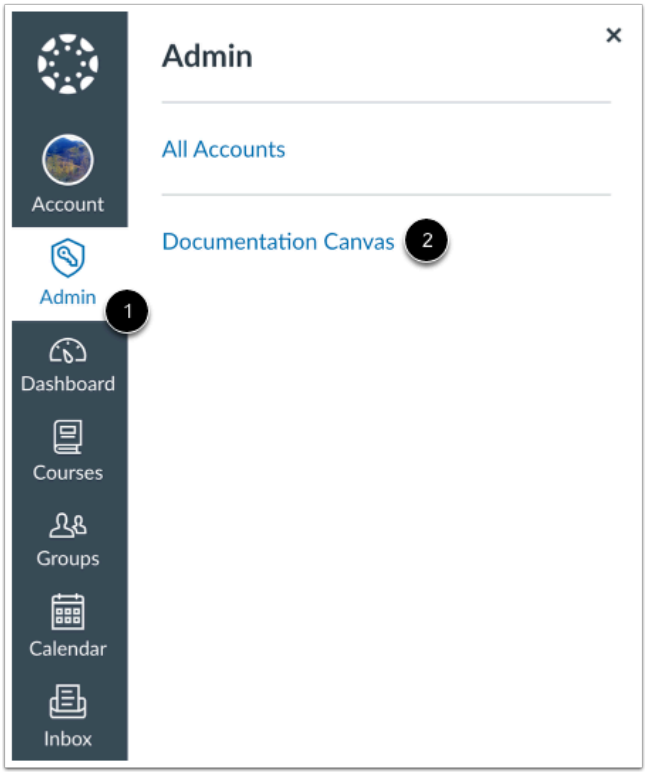
How do I view the Admin Analytics Course Dashboard?

If enabled by your institution, you can use Admin Analytics to view, filter, and download data about Canvas usage.

In the Course Dashboard, you can view course grade and engagement statistics, feature use data, courses with low average grades, and courses with low student activity.

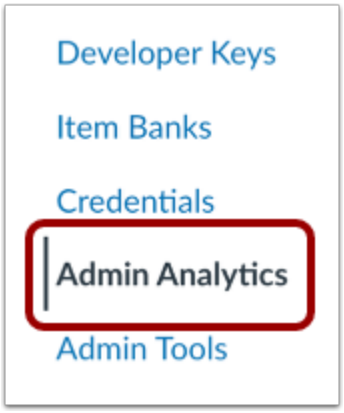
Learn more about dashboard charts and statistics.

Open Account



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

Open Admin Analytics



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

Open Course Dashboard



To open the Course Dashboard, click the **Courses** link.

View Course Dashboard



In the Course Dashboard, you can view the following quick statistics and charts:

- Published or concluded courses with activity [1]
- Courses with an average grade less than 70% [2]
- Courses in which 60% of students have no activity in last 7 days [3]
- Feature use in courses with activity [4]
- Content feature use in courses with activity over time [5]
- Activities feature use in courses with activity over time [6]
- Individual courses with an average grade less than 70% [7]
- Courses with low student activity [8]

Learn more about viewing and managing statistic and chart data.

Note: All statistics and charts display data based on the selected filters.

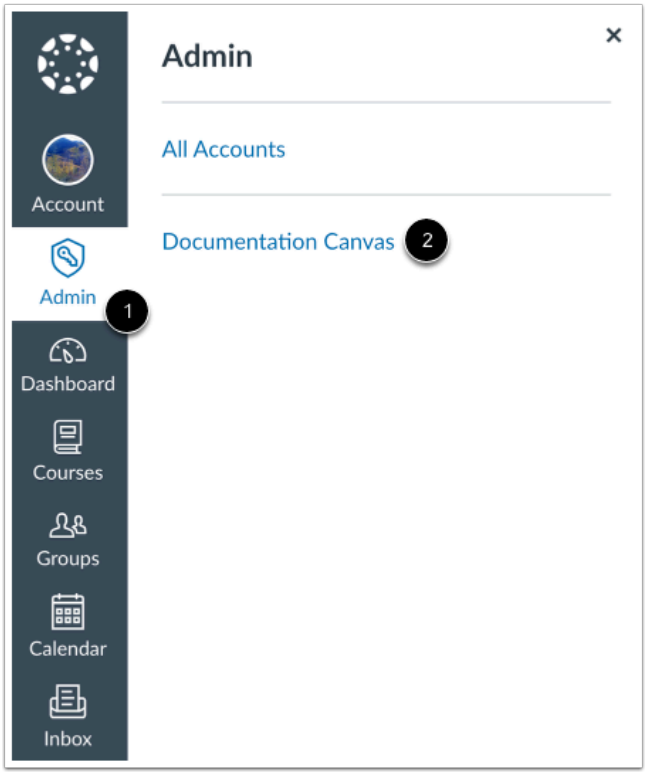
How do I view the Admin Analytics Student Dashboard?

If enabled by your institution, you can use Admin Analytics to view, filter, and download data about Canvas usage.

In the Student Dashboard, you can view student grade and engagement statistics, grade averages, submissions by status, and student details.

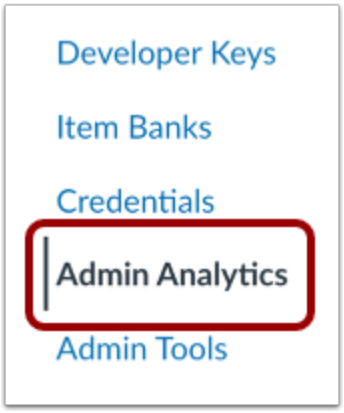
Learn more about dashboard charts and statistics.

Open Account



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

Open Admin Analytics



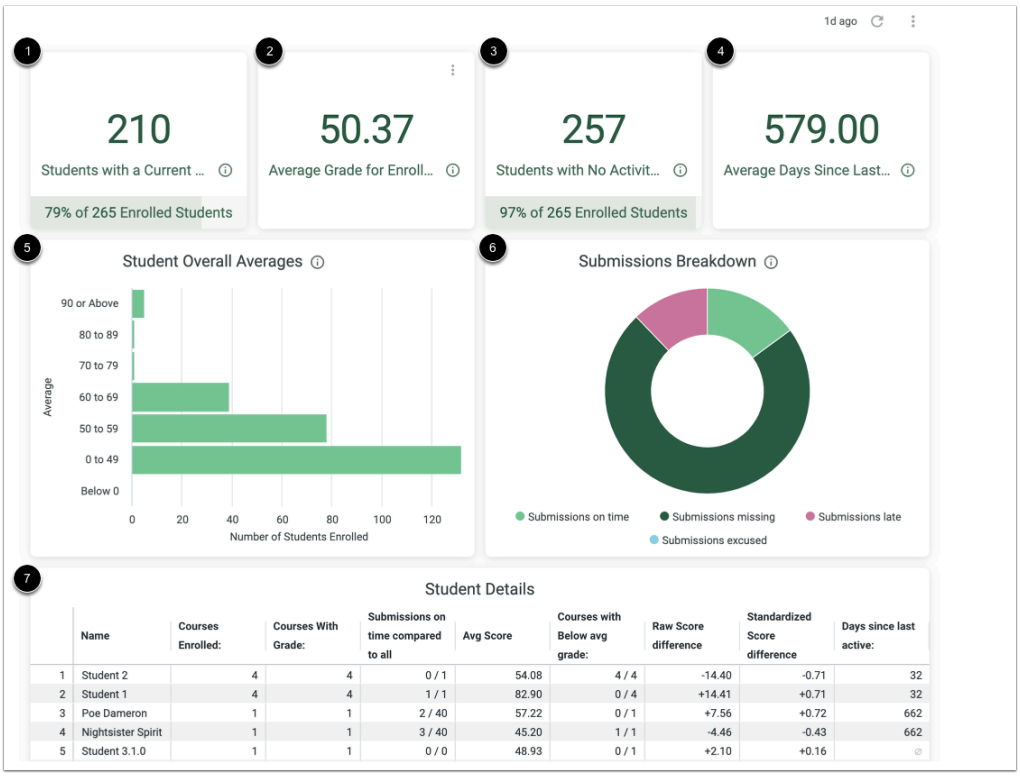
In Account Navigation, click the **Admin Analytics** link.

Open Student Dashboard



To open the Student Dashboard, click the **Students** link.

View Student Dashboard



In the Student Dashboard, you can view the following quick statistics and charts:

- Students with a current course score less than 60% [1]
- Average grade for enrolled students [2]
- Students with no course activity in last 30 days [3]
- Average days since the last course interaction [4]
- Grade averages for enrolled students [5]
- Student submissions by status [6]
- Student details [7]

Learn more about viewing and managing statistic and chart data.

Note: All statistics and charts display data based on the selected filters.

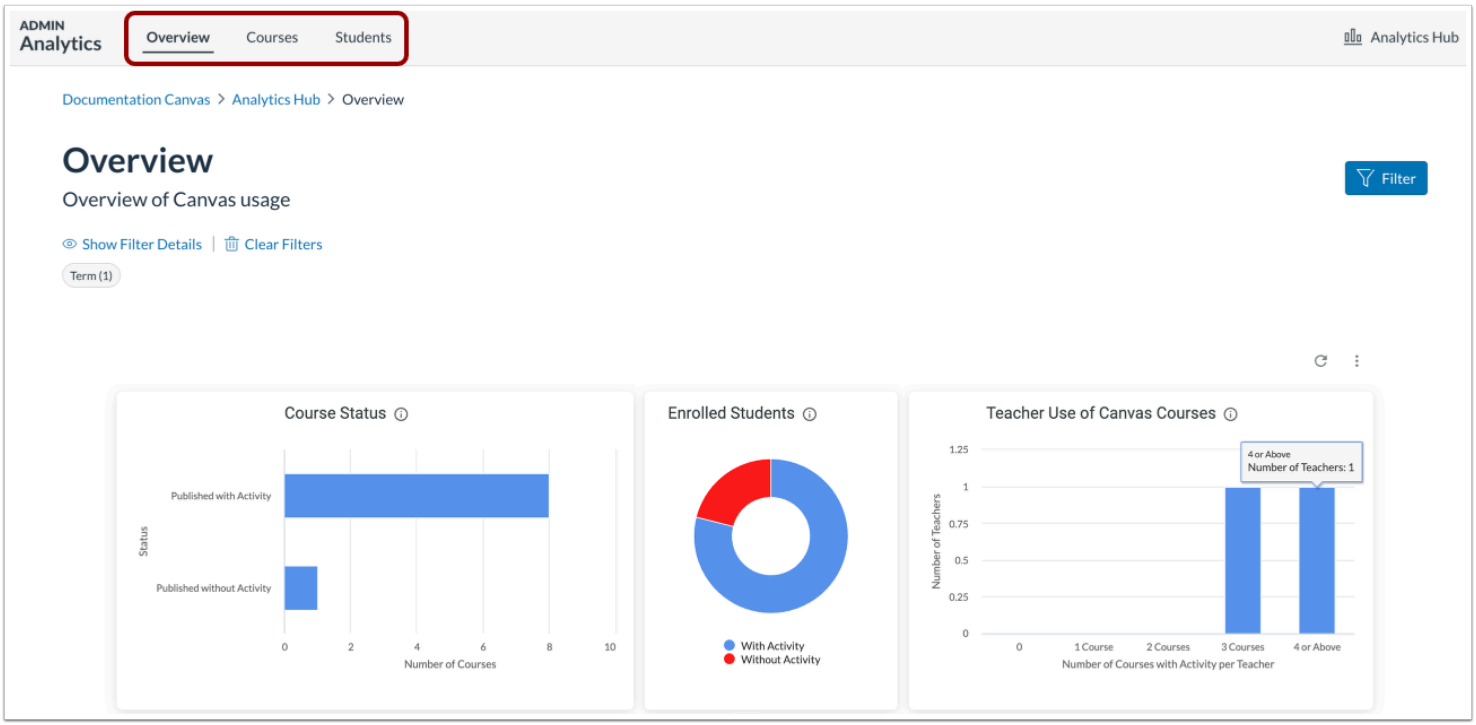
How do I view and manage statistics and chart data in Admin Analytics?

Admin Analytics and New Analytics data is pulled from Canvas Data 2 (CD2)/Data Access Platform (DAP).

If enabled by your institution, you can use Admin Analytics to view, filter, and download data about Canvas usage. Within a dashboard, you can also view and manage statistics and chart data.

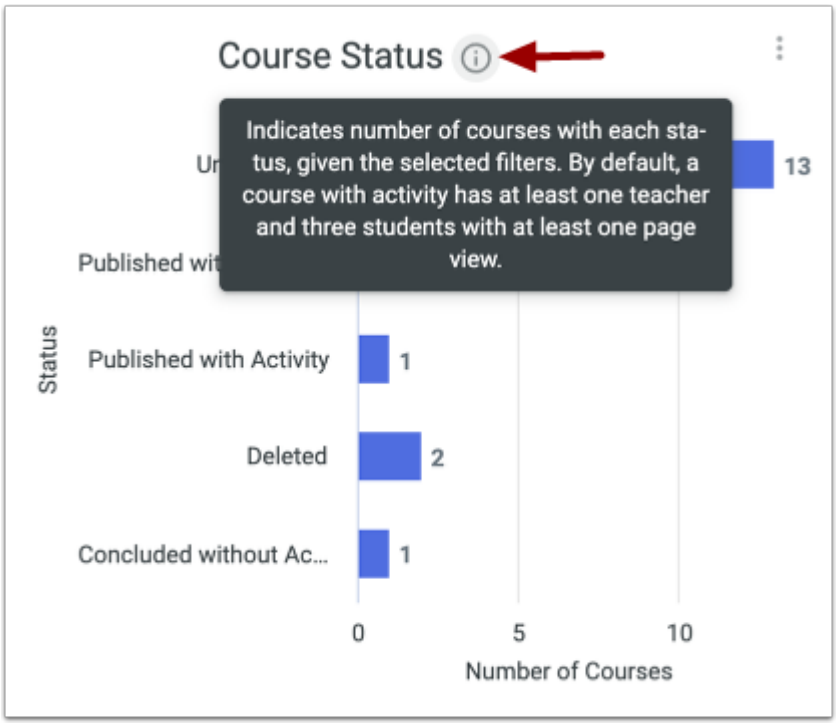
Learn more about dashboard charts and statistics.

View Admin Analytics



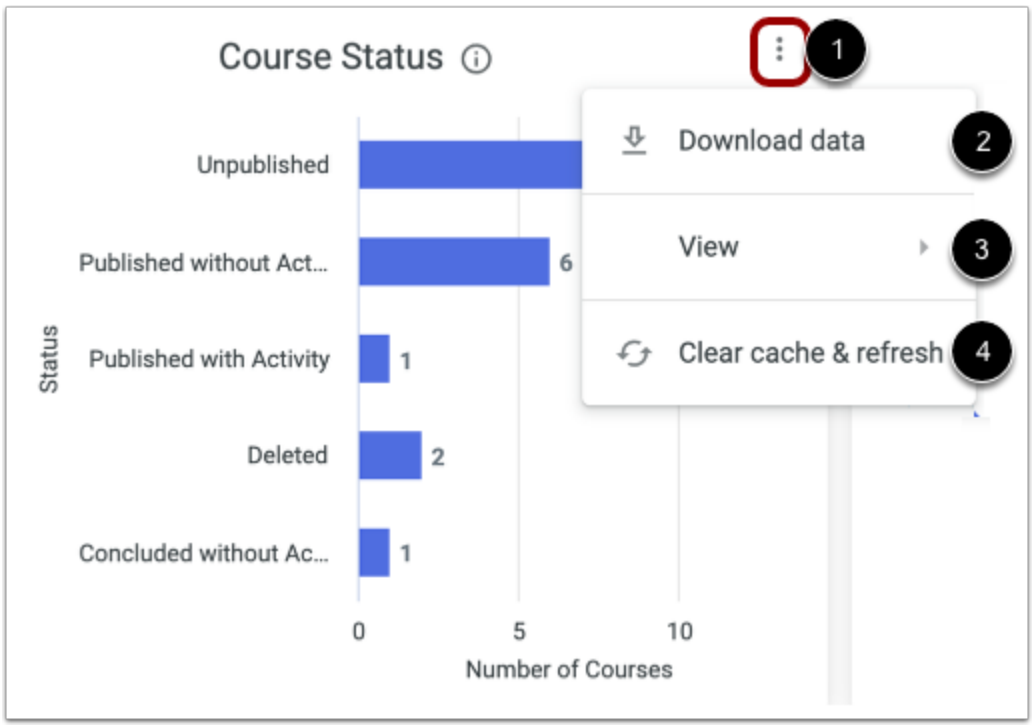
In Admin Analytics, you can view data via the Overview, Course, or Student Dashboards. Statistics and charts vary depending on the dashboard.

View Statistics or Chart Description



To view a statistic's or chart's description, hover over the statistic or chart **Information** icon.

Manage Statistics or Chart Options



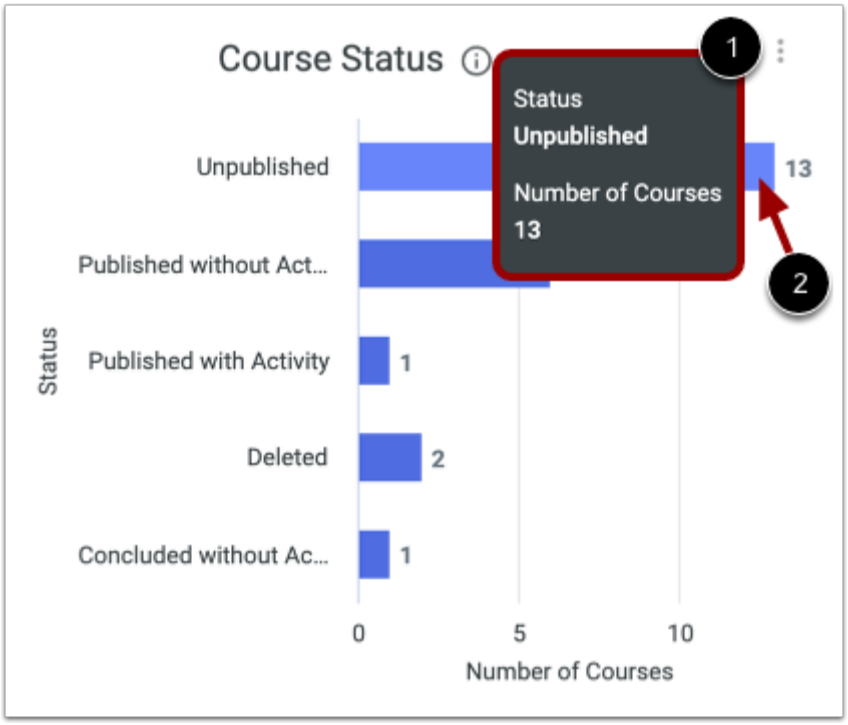
To manage options for a statistic or chart, hover over the statistic or chart and click the **Options** icon [1].

To download statistic or chart data, click the **Download data** link [2].

To see an expanded or full screen view of the chart, click the **View** option [3].

To refresh the statistic's or chart's cache, click the **Clear cache & refresh** link [4].

View Additional Chart Data

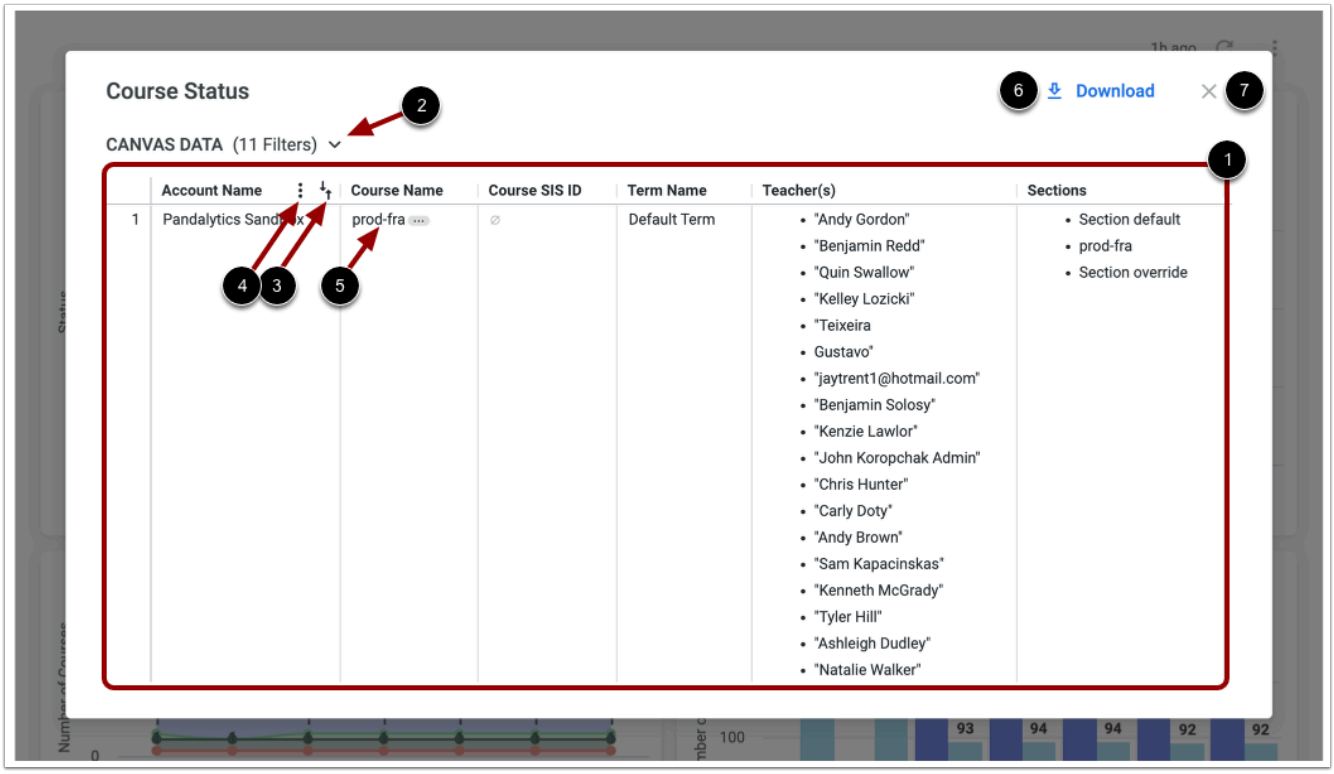


You can view details for a data point included in a chart by hovering over the data point [1].

To view additional information on a data point, click the data point [2].

Note: Due to the size of data included, it's not possible to view or download data from the Interactions Over Time chart.

Manage Additional Chart Data



A modal displays additional data point information [1]. Columns vary depending on the chart and data point selected.

To view selected filters, click the **Filters** arrow [2].

To sort data by a column, hover over the column and click the **Sort** icon [3].

To manage options for a column, hover over the column and click the column's **Options** icon [4].

If a course name is listed in the modal, you can navigate to the course by clicking the course name [5].

To download data point information, click the **Download** link [6]. You can download up to 5,000 rows of information.

To close the modal, click the **Close** icon [7].

Learn more about dashboard charts and statistics.

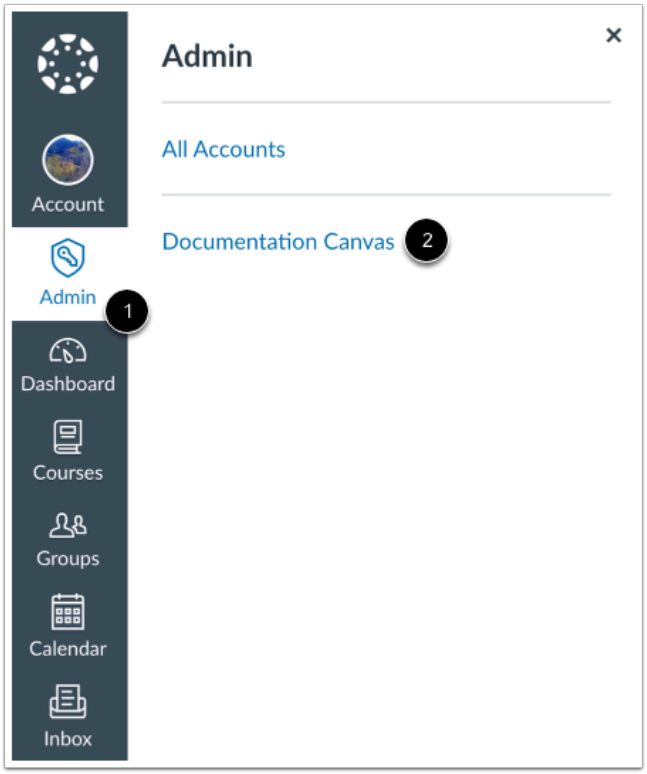
Analytics

How do I use Analytics Hub to access all my Instructure data from one place?

As a Canvas admin, you can use Analytics Hub to access data and analytics from Canvas as well as from other Instructure products such as Mastery and Impact. Your suite of analytics tools and data are based on your purchases (such as Intelligent Insights, Mastery products, and Impact), individual role permissions, and selected account feature options (such as Admin Analytics).

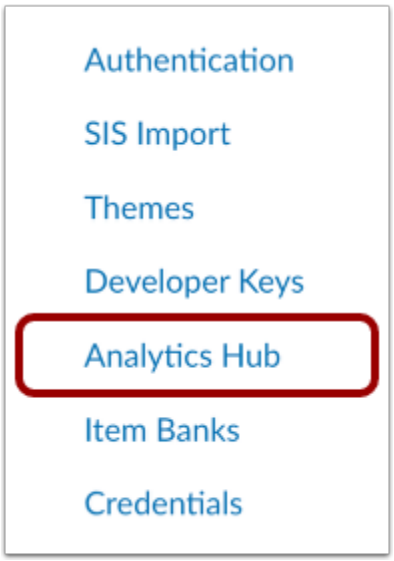
⚠ In the beta environment only, Admin Analytics and Course Analytics data is pulled from Canvas Data 2 (CD2)/Data Access Platform (DAP). All data will be migrated to CD2/DAP on August 1, 2024. You can migrate your data to CD2/DAP before August 1, 2024 by contacting your Customer Success Manager (CSM).

Open Account



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

Open Analytics Hub



In Account Navigation, click the **Analytics Hub** link.

View Analytics Hub



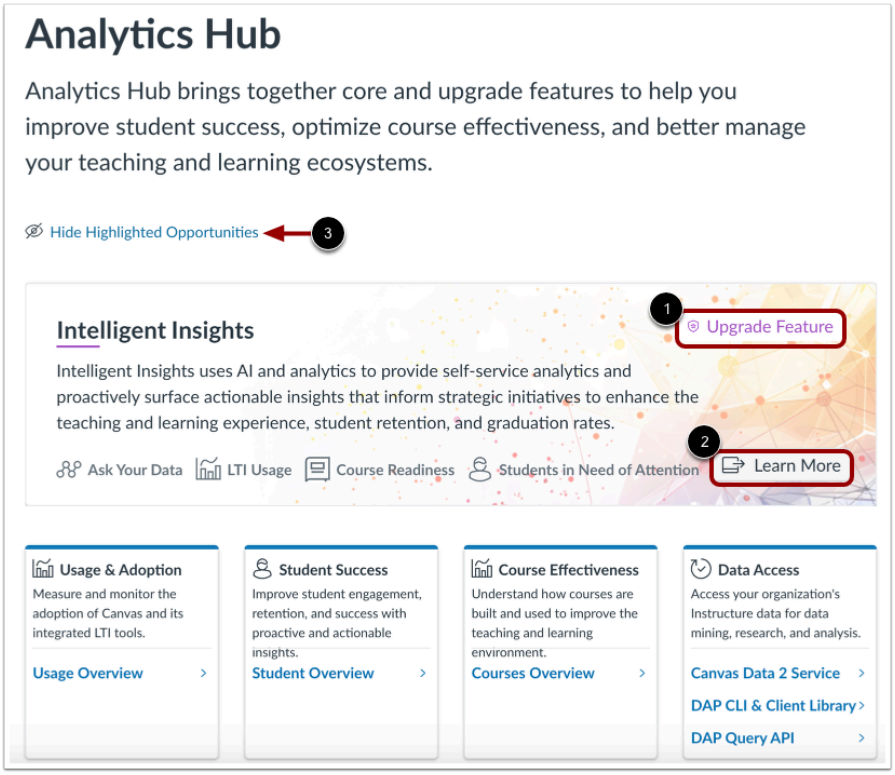
The Analytics Hub displays area cards for accessing available data, analytics, and insights. Depending on your preferences, purchases, and role permissions, you may have access to the following areas of analytics:

- **AI-Assisted Insights** [1]: Use everyday language to query your data and gain deep insights with custom visualizations. Learn more about Ask Your Data.
- **Usage & Adoption** [2]: Measure and monitor the adoption of Canvas and its intetrated LTI tools. Learn more about Usage Overview, Impact Insights, and LTI Usage.
- **Student Success** [3]: Improve student engagement, retention, and success with proactive and actionable insights. Learn more about the Student Overview dashboard and the Students in Need of Attention data.
- **Course Effectiveness** [4]: Understand how courses are built and used to improve the teaching and learning environment. Learn more about the Courses Overview dashboard and the Course Readiness report.
- **Standards Proficiency** [5]: View aggregated performance data on standards-aligned assessments.
- **Assessment Results** [6]: View student performance on individual assessments. You can view Formative Assessments, Benchmark Assessments, or State & National Assessments.
- **Data Access** [7]: Access your organization's interactive data for data mining, research, and analysis. Data access includes Canvas Data 2 services, DAP CLI & Client Library, and DAP Query API.

Notes:

- Analytics are based on your purchases, account settings, and your individual user role permissions.
- Intelligent Insights is a paid product offering that uses AI and analytics to provide self-service analytics. It gives you access to Ask Your Data, LTI Usage, Course Readiness, and Students in Need of Attention. To learn more, contact your Customer Success Manager (CSM).

View Analytics Hub Offerings

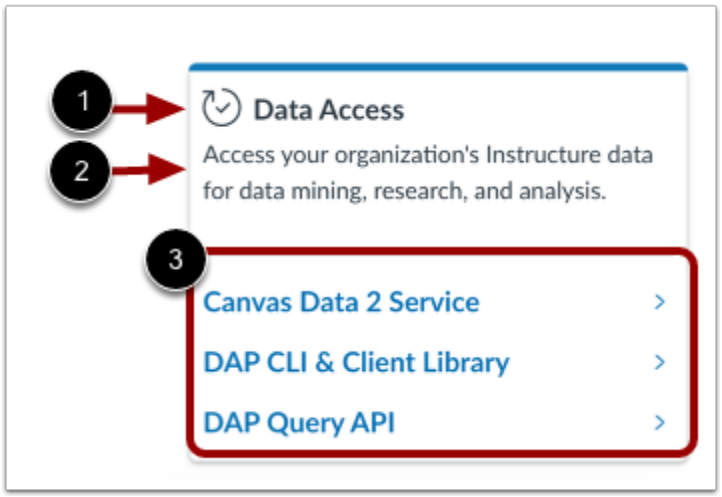


Optional analytics may display the **Upgrade Feature** label [1]. If your institution has not yet purchased an upgrade feature, you can find out more about the feature by clicking the **Learn More** link [2].

To view only analytics you currently have access to, click the **Hide Highlighted Opportunities** link [3].

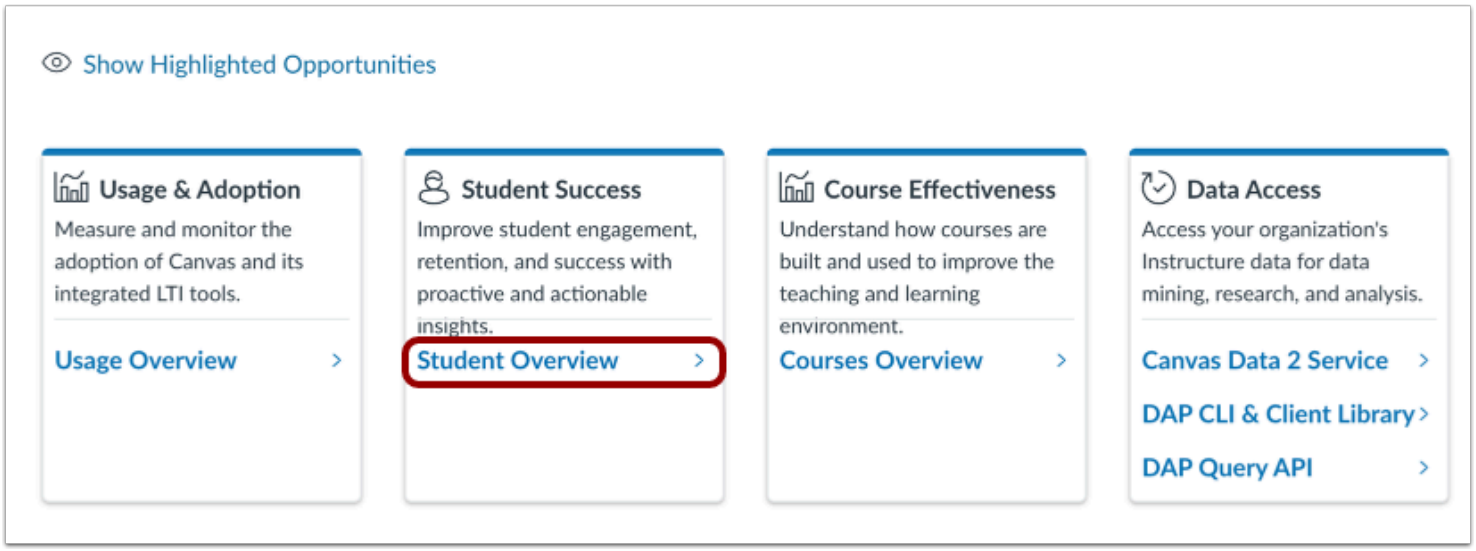
Note: To purchase upgrade features, contact your Customer Success Manager (CSM).

View Area Card



Each area card includes a title [1], a description [2], and sub-area links [3].

Open Analytics



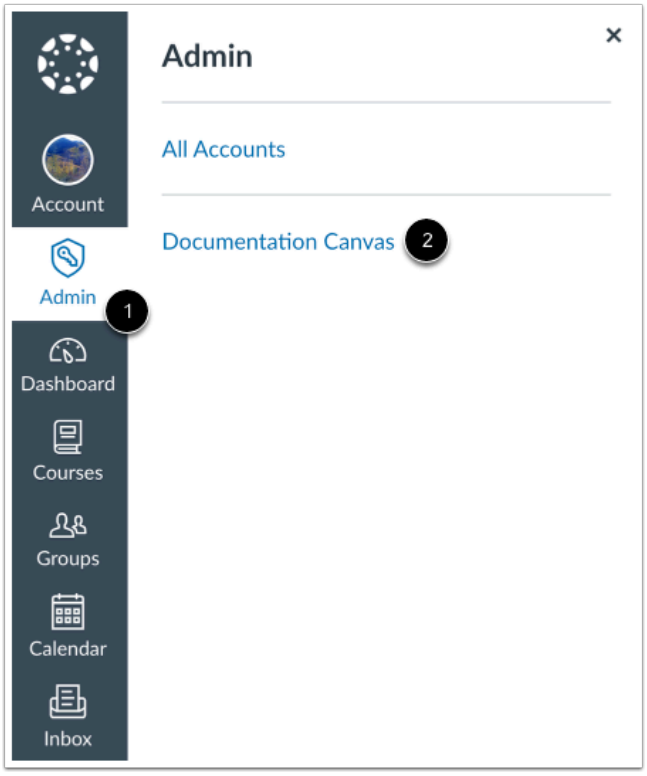
To view an area of analytics, click the sub-area link.

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.

Note: If your analytics look different than what is displayed in this lesson, you may have Admin Analytics enabled in your account. Learn how to use Admin Analytics in your account.

Open Account



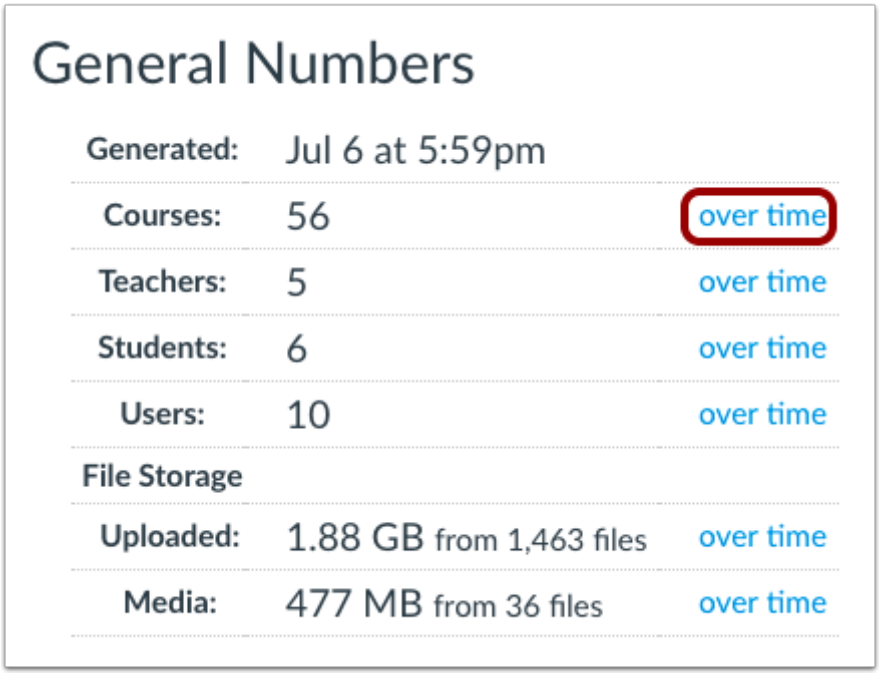
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Statistics



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

View General Numbers

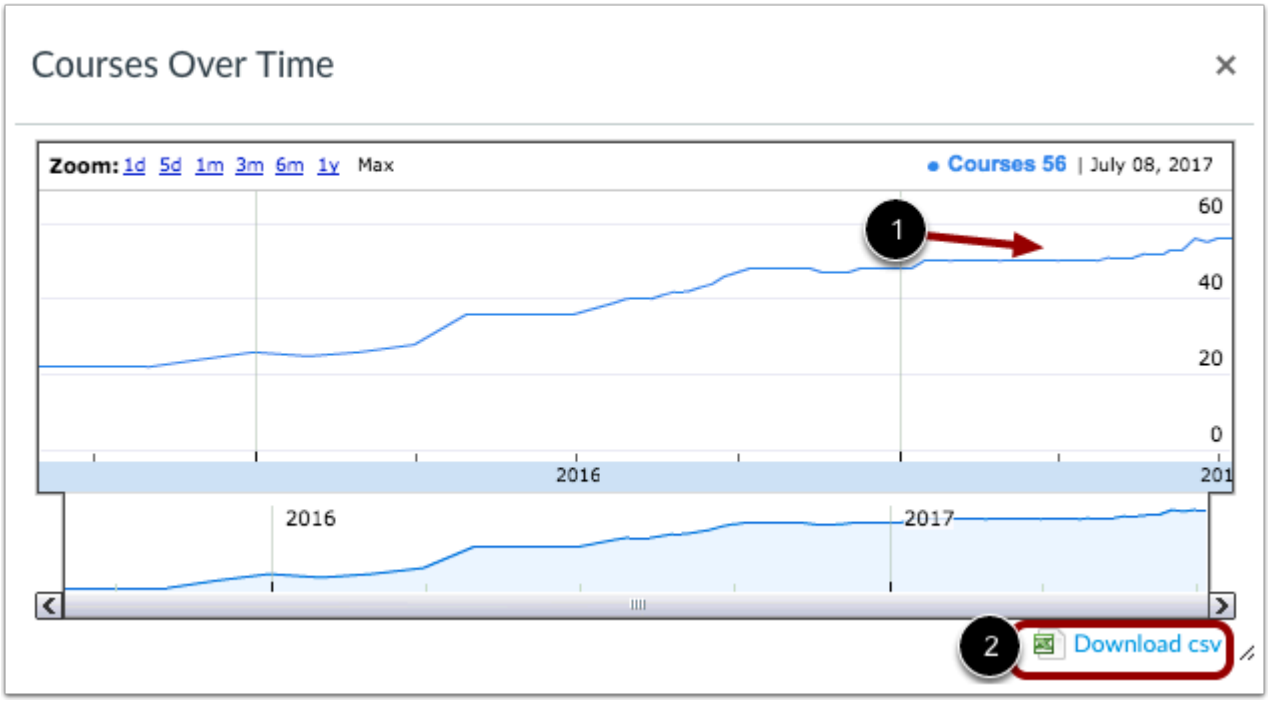


In the Statistics page, you can view general information about your account.

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

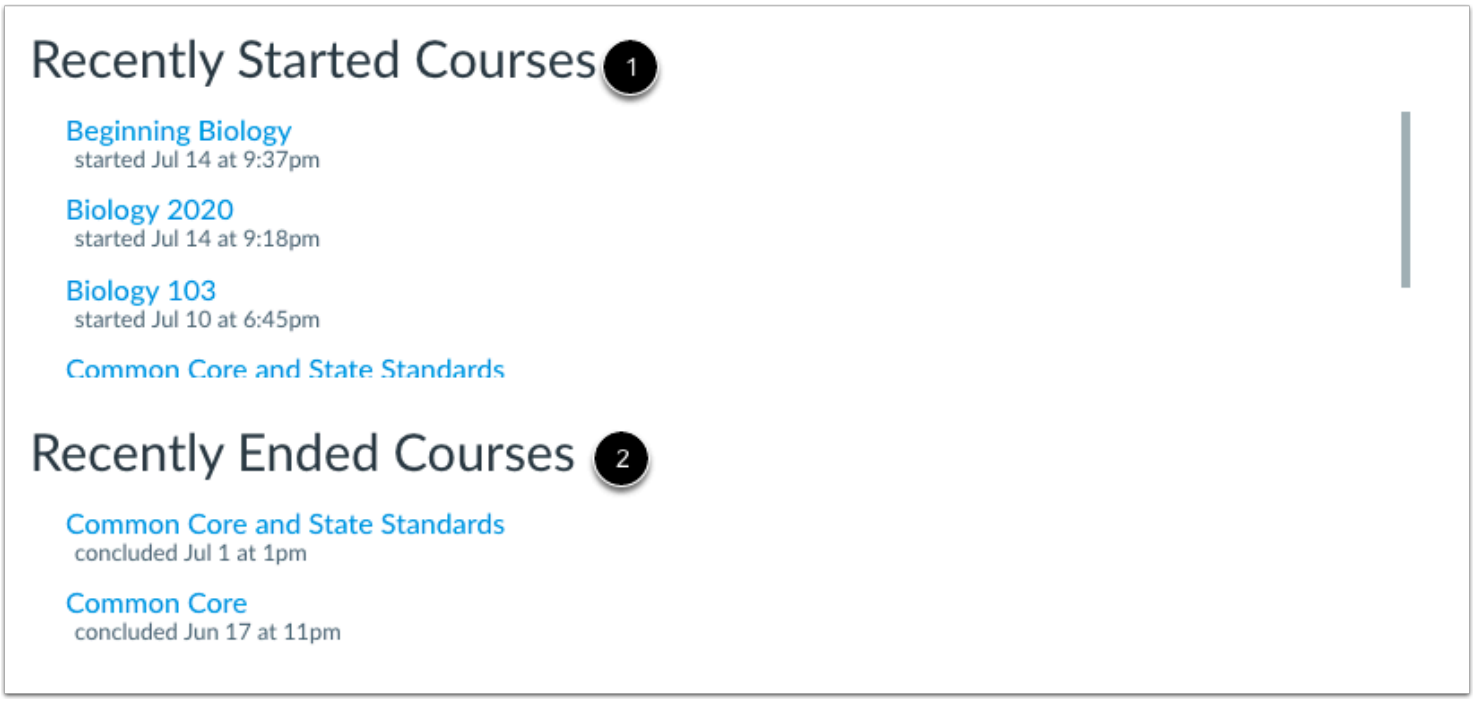
General numbers show the current statistics in the course; to view how a statistic has evolved over time, click the **over time** link.

View Statistics Over Time



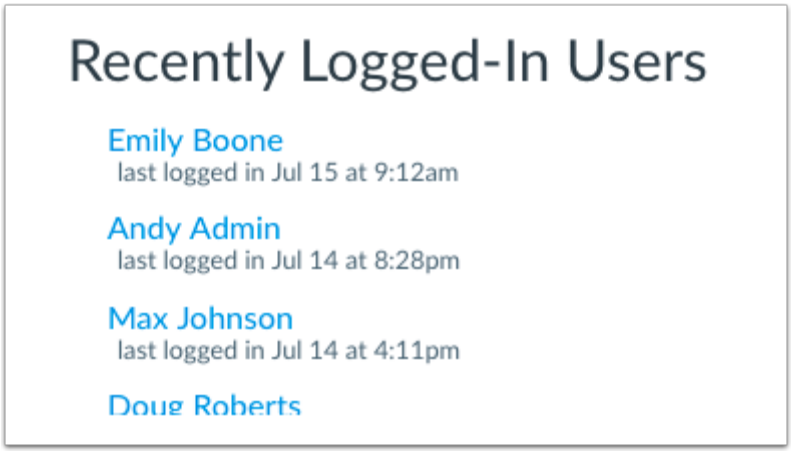
The statistics over time graphs show how specific data has evolved since your account was created. You can move your cursor over the data graph to view data for a specific date [1]. You can also download the data by clicking the **Download CSV** link [2].

View Course Statistics



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.

API

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

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

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

Option One: Make A Call Over HTTPS

```
GET /api/v1/courses.json
```

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

- *GET /api/v1/courses.json*

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

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

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

Option Two: Make A Call Using A Request Header

OAuth2 Token sent in header:

```
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>" 'https://<canvas>/api/v1/accounts/<account_id>/courses.json'*

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

See the example on the API documentation site.

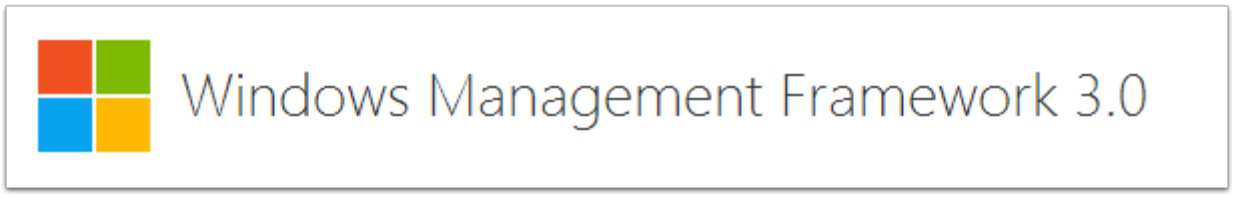
How do I install PowerShell 3.0 on a Windows machine?

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

PowerShell is typically installed natively on the Windows operating system.

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

Download and Install Windows Management Framework 3.0



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

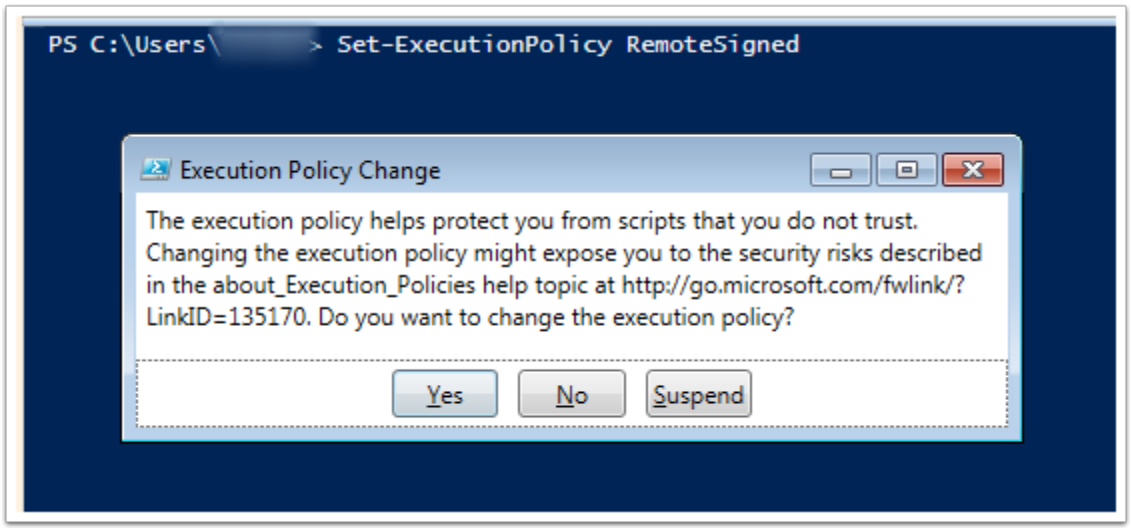
Note: Version 3 is more compatible with restful API call.

Download and Install PowerShell cmdlet



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

Execute PowerShell Scripts



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
```

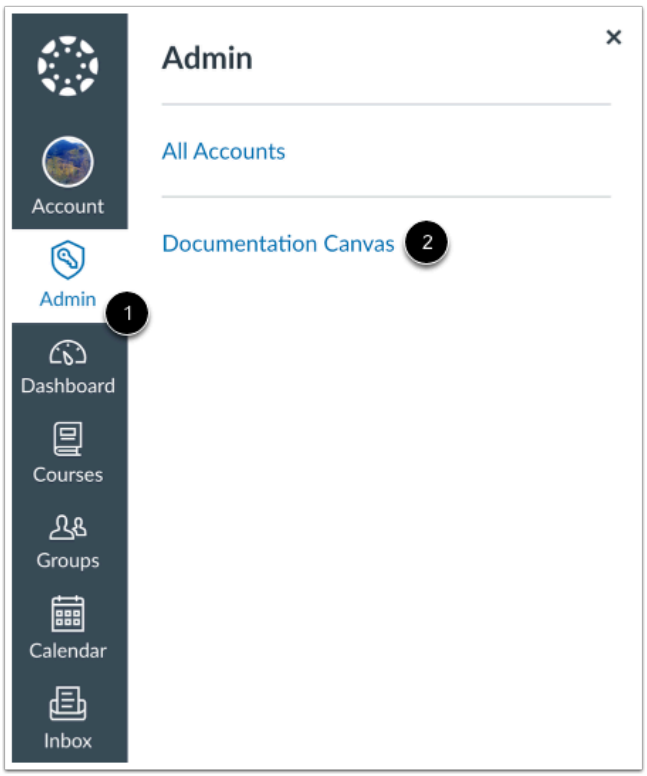
Attendance (Roll Call)

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

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

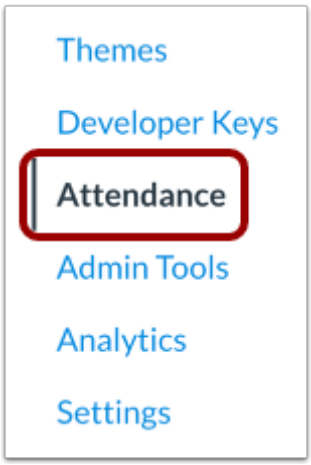
Instructors can also create their own badges within their courses. However, you can manage badges within a course at any time.

Open Account



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

Open Attendance



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

Manage Badges



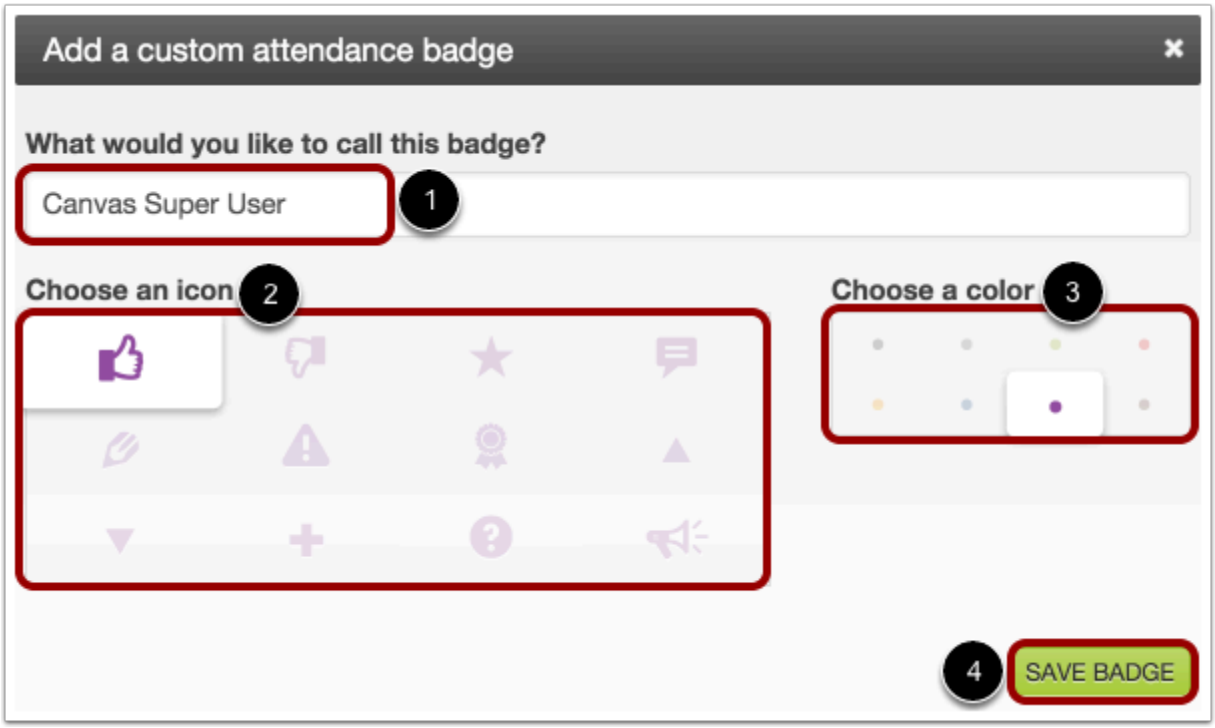
Click the **Manage badges** tab.

Add Badge



Click the **Add Badge** button.

Save Badge



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

Manage Badges



You can edit any badge you create for your account.

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

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

Note: When managing or editing badges, any changes made will affect the entire account.

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

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

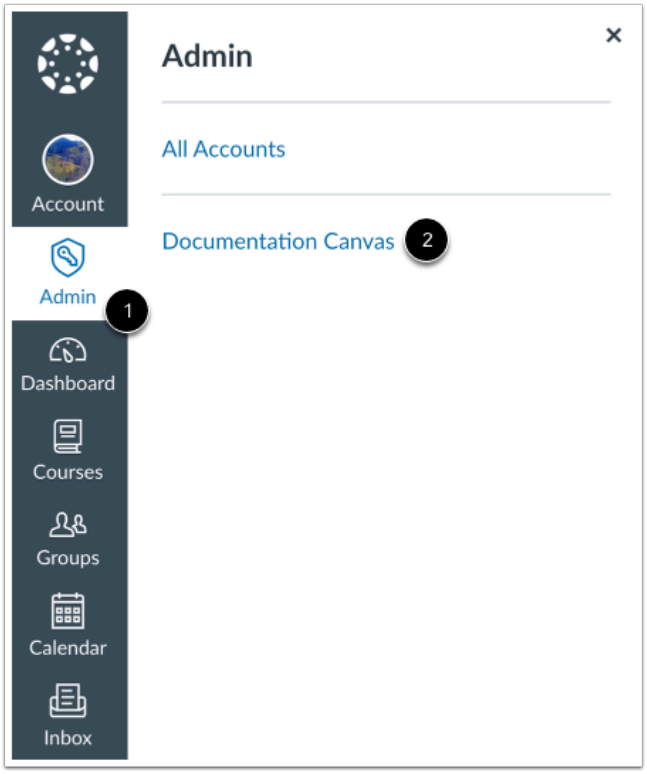
The downloaded CSV report displays all content in a list. Reports always include the following data fields: Course ID, SIS Course ID, Course Code, Course Name, Teacher ID, Teacher Name, Student ID, Student Name, Class Date, Attendance, and Timestamp.

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

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

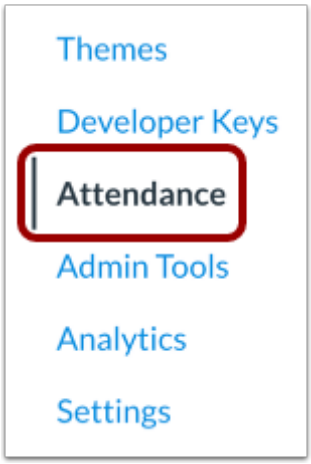
Note: In order to gather all the needed information, a provisioning report will also be generated when an attendance report is requested. The provisioning report can be viewed in the Reports tab in Account Settings.

Open Account



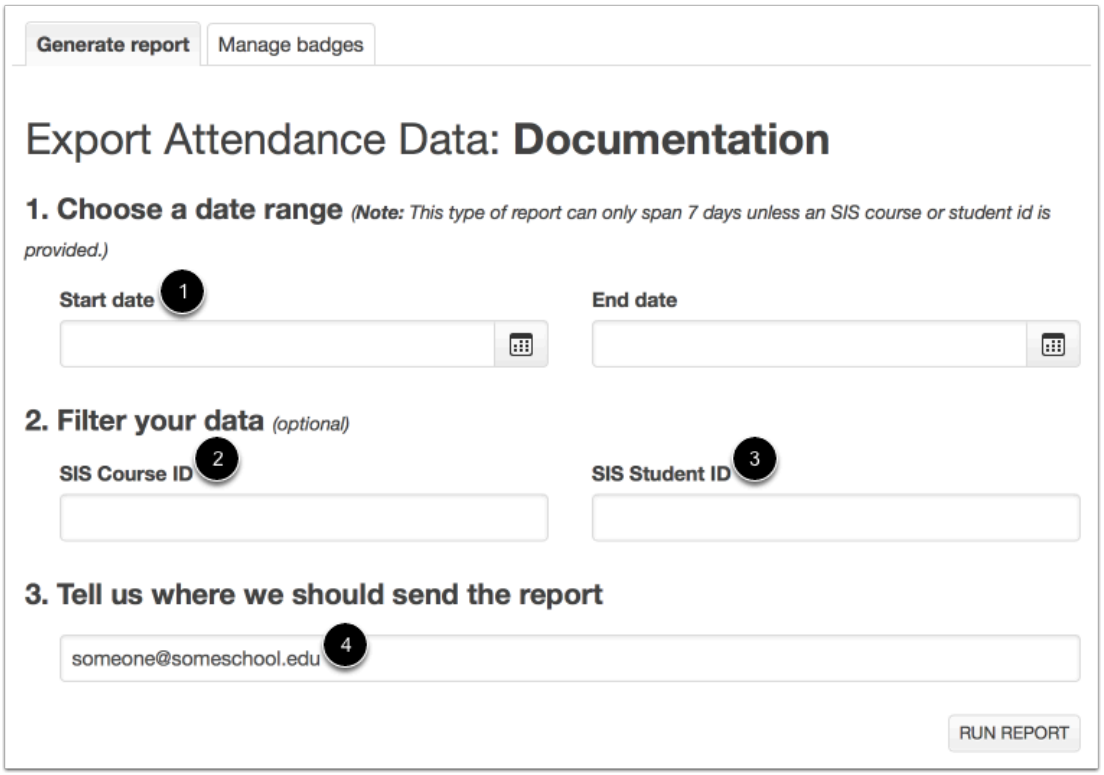
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Attendance



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

Specify Report Data

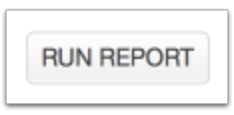


In the Generate Report tab, you can specify criteria for your report. If you leave the fields blank, the report will be generated for the entire account.

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

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

Run Report



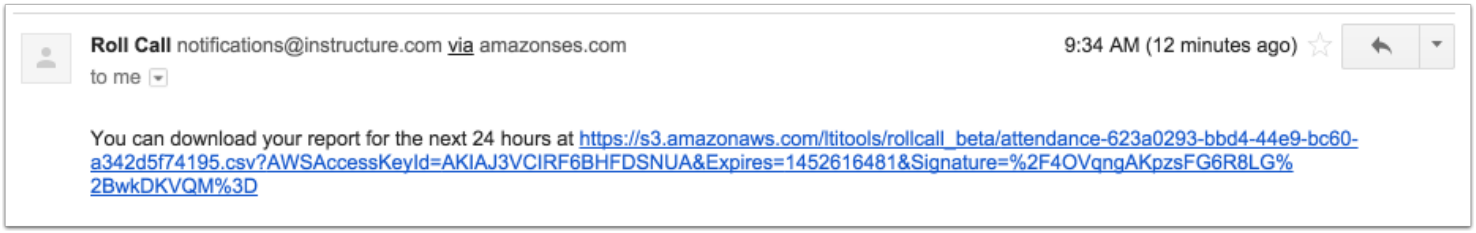
Click the **Run Report** button.

View Notification



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.

Authentication

How do I configure Canvas authentication details for an account?

In Authentication Settings, you can manage SSO, Canvas self registration, control Multi-Factor Authentication (MFA) requirements. You may also be able to customize password requirements and manage login attempt details.

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

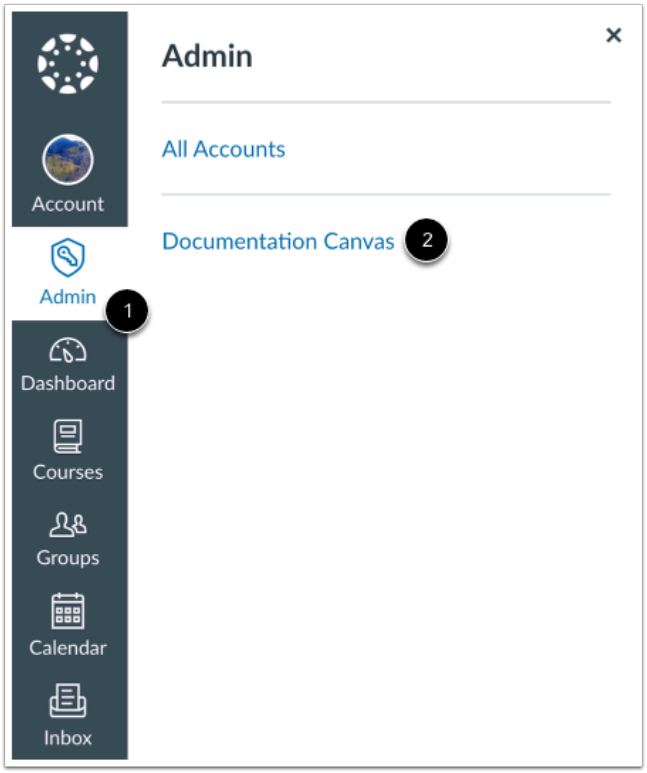
Canvas authentication includes an option called self registration, which displays a registration banner on your account login page that allows users to create their own Canvas accounts. You can also require users to complete a Captcha form before completing the registration process.

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

Notes:

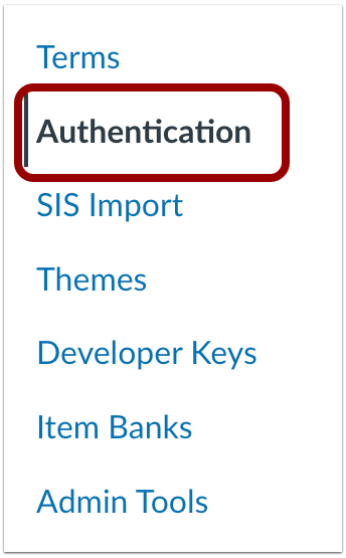
- Canvas authentication can only be deleted from the authentication page if another third party authentication provider has been enabled. If the only existing authentication provider is deleted, Canvas authentication will be restored as the default provider.
- Unless customized, Canvas authentication passwords require a minimum of eight characters.

Open Account



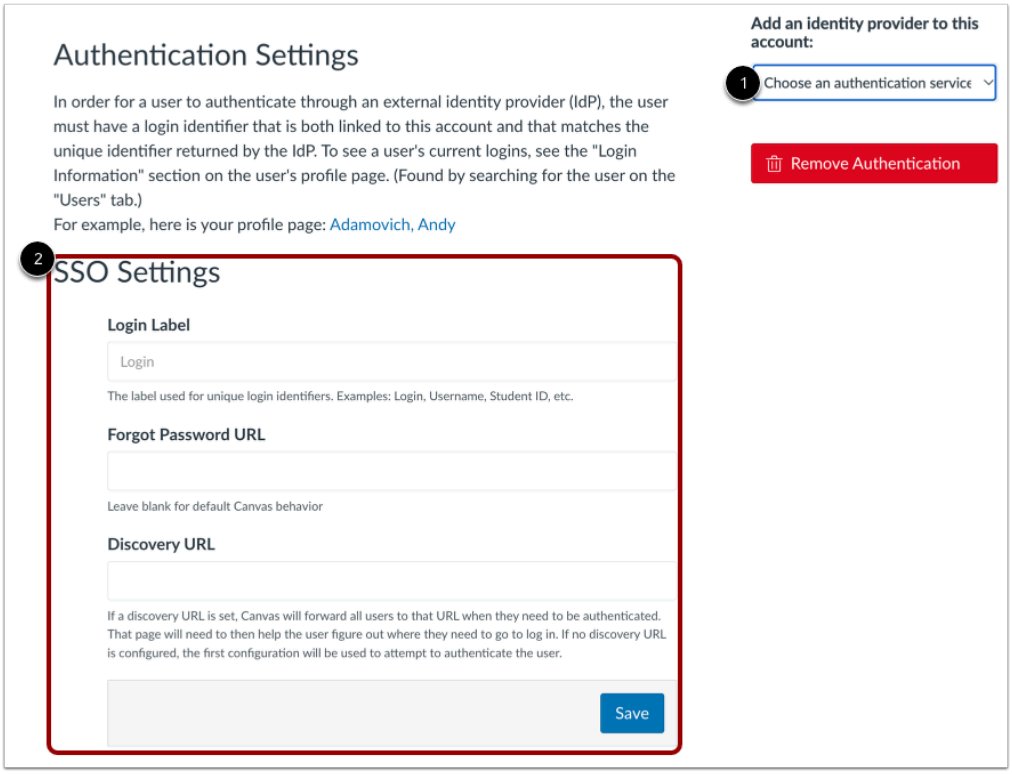
Click the **Admin** link [1], then click the name of the account [2].

Open Authentication



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

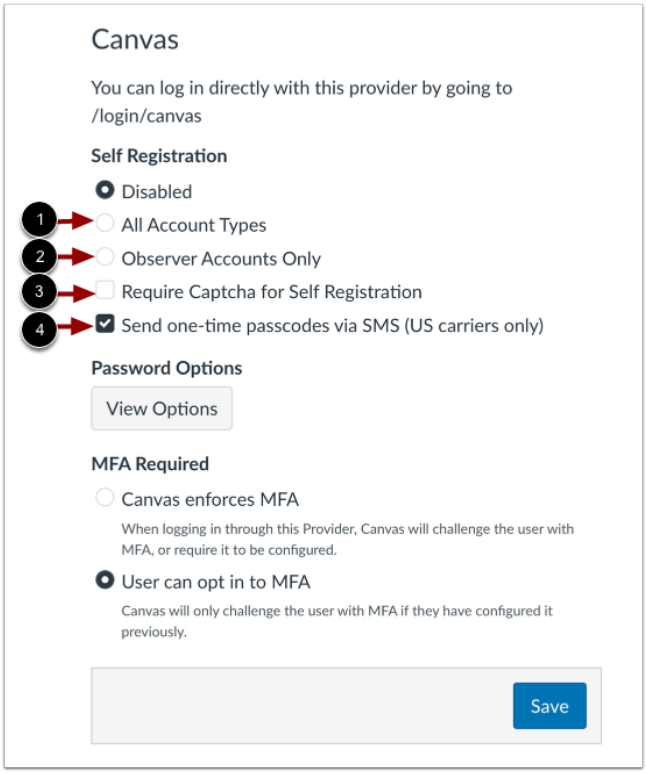
Configure SSO Settings



In Authentication Settings, you can configure third-party authentication providers [1].

You can also configure Single Sign On (SSO) settings for your authentication provider [2].

Configure Self Registration



By default, Self Registration is disabled. To allow self registration for all users, click the **All Account Types** radio button [1]. All accounts includes those for students, instructors, and observers.

- For students, self registration is used with self enrollment. When users sign up as a student, a join code is required to access the course. Self enrollment creates the join code, which instructors can give to students to sign up in the course. Learn more about self enrollment options in your account.
- Instructors can sign up for a Canvas account through self registration if your institution does not already create instructor accounts.

To limit self registration to observers (including parents), select the **Observer Accounts Only** option [2].

To require users to complete a Captcha form before completing the registation process, click the **Require Captcha for Self Registration** checkbox [3].

To allow users to receive a one-time passcode via SMS, click the **Send one-time passcodes via SMS (US carriers only)** checkbox [4].

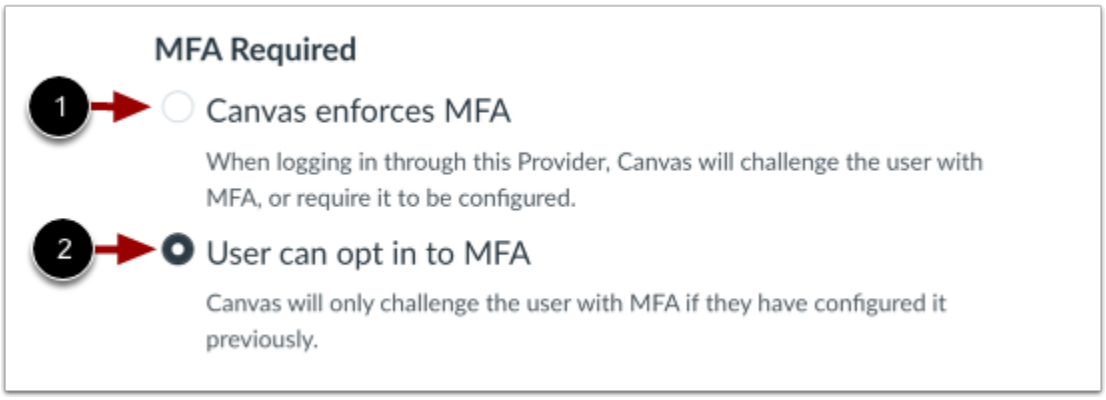
Note: If the All Account Types option is selected, it is recommended to require users to complete a Captcha form to avoid the creation of spam users.

Manage Passwords Options



If the *Enhance password options* setting is enabled in Account Feature Options, you can customize passwords and control login attempts in the Password Options section. To manage passwords and login attempts, click the **View Options** button.

Require MFA



To require Multi-Factor Authentication (MFA), click the **Canvas enforces MFA** radio button [1].

To allow users choose whether they want MFA, click the **User can opt in to MFA** radio button [2].

Save Authentication



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 Apple, Facebook, Github, LinkedIn, Google Apps, Microsoft (Office 365), Clever, CAS, LDAP, 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.

For additional help with authentication systems, including Single Sign On (SSO) support, view the integration documents in the Canvas Community.

Just In Time Provisioning

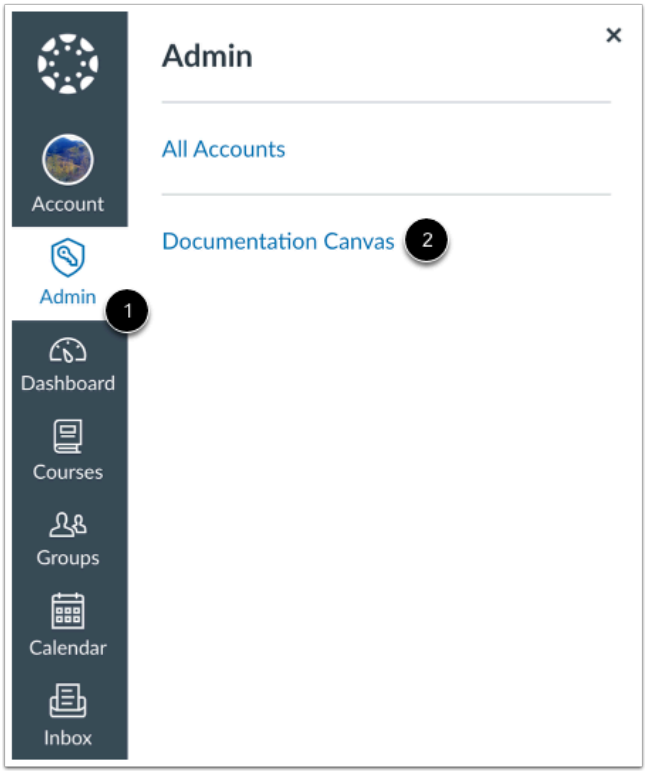
As part of the authentication process, admins can apply Just in Time Provisioning, which tells Canvas to automatically create a user's account if one does not already exist. Currently, when a user logs in to Canvas using a third-party authentication system, Canvas searches users in the account looking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

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

Federated Attributes

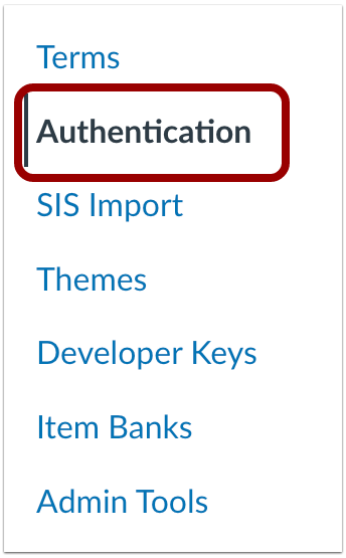
As a complement to JIT provisioning, all authentication providers support federated attributes. When users log into Canvas, more information beyond just ID is passed to Canvas, and that information is associated with their existing user accounts. More information can be found in the Authentication Providers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

Open Account



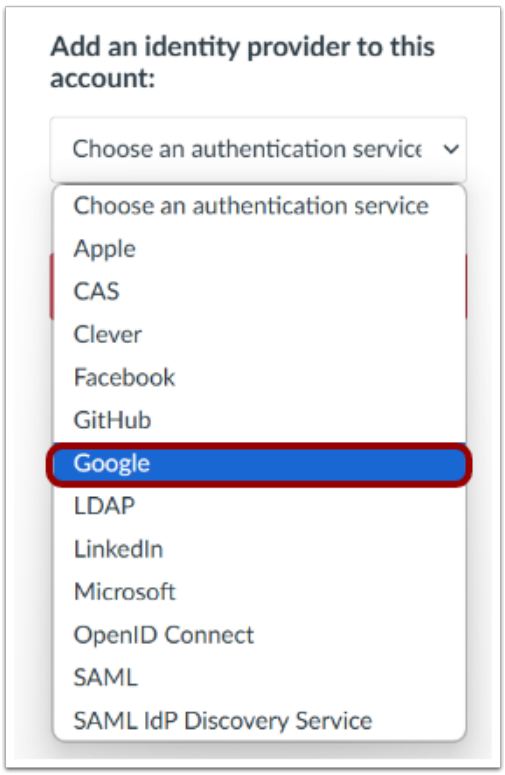
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Authentication



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

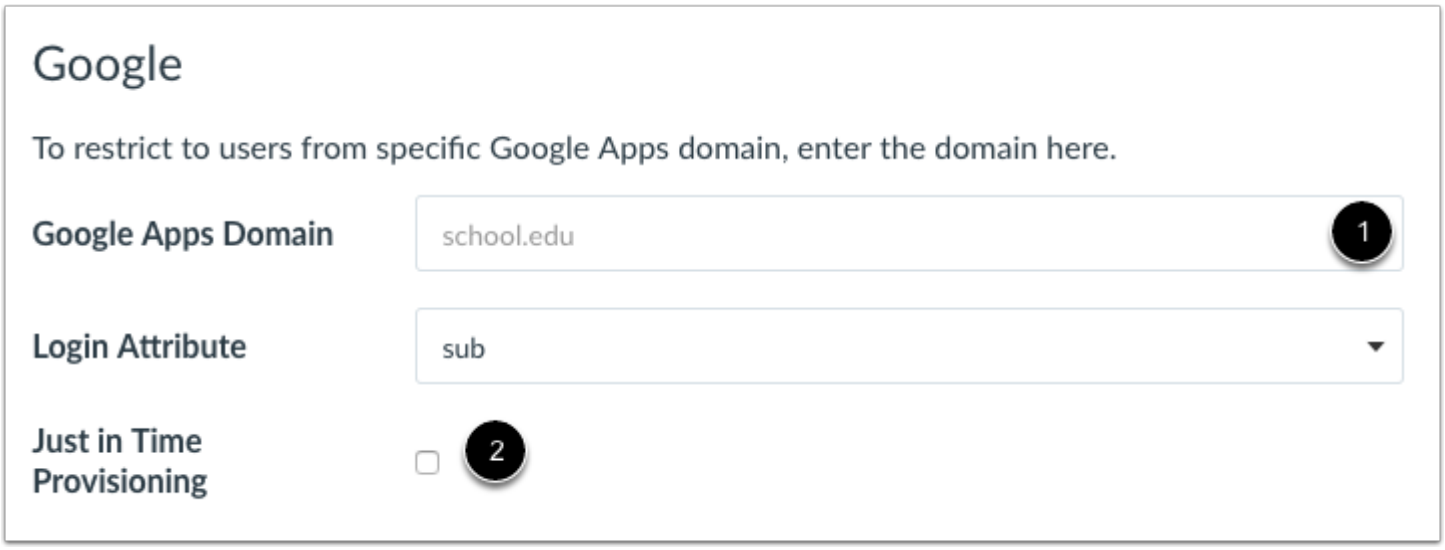
Choose Provider



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

Note: If your account is part of an established trust account, you can select Trusted Canvas instance from the Identity Provider drop-down menu. Learn more about configuring trusted Canvas instance authentication.

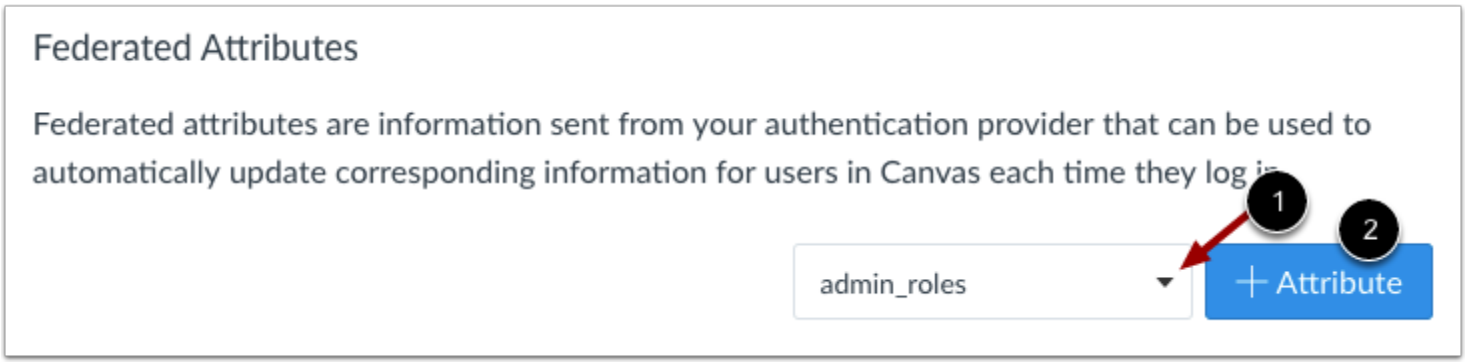
Save Provider Data



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

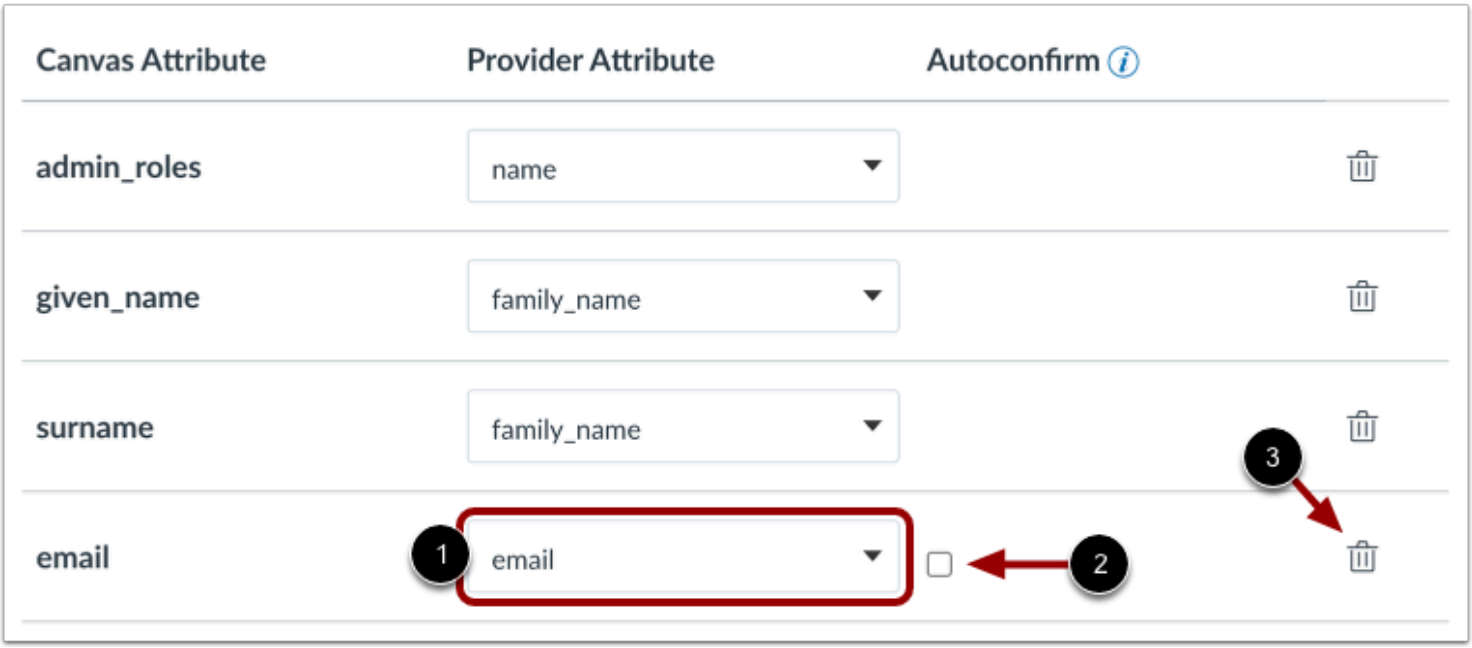
To enable Just in Time Provisioning, click the **Just in Time Provisioning** checkbox [2].

Set Federated Attributes



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

Click the **Add Attribute** button [2].



In the **Provider Attribute** drop-down menu, choose the attribute value that will match the selected Canvas attribute [1]. Available values include email, family name, given name, locale, name, and sub (subject identifier—a user ID commonly used with Google, and Microsoft specifications).

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

To enable automatic confirmation of email address, click the **Autoconfirm** checkbox [2].

To remove the attribute, click the **Delete** icon [3].

Require Multi-Factor Authentication



Canvas enforces MFA is functionally equivalent to the legacy UIs checkbox for MFA Required being enabled; any accounts that previously had the legacy MFA Required checkbox enabled have this option selected.

To have Canvas enforce the MFA, select the **Canvas enforces MFA** option [1]. To have SMS carriers send one-time passcodes, click the **Send one-time passcodes via SMS (US carriers only)** checkbox [2].

To have the provider enforce the MFA, select **Provider enforces MFA** option [3].

To have the user opt in, select **User can opt in to MFA** option [4].

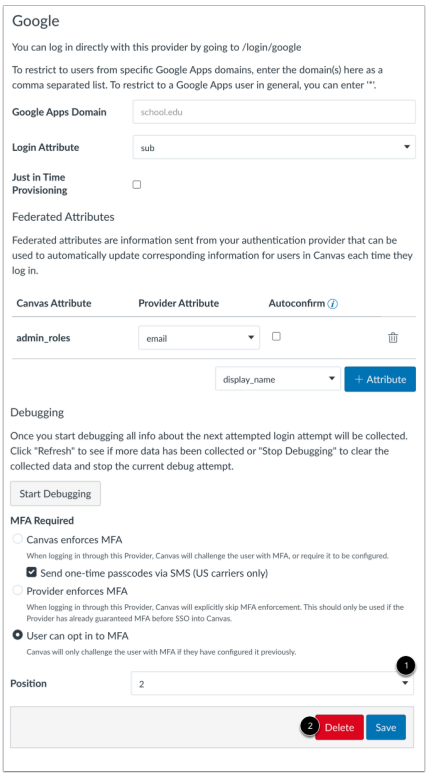
Note: Your institution's Customer Success Manager can set MFA to the following: Disabled, Optional, Required for Admins, or Required.

Save Data



Click the **Save** button.

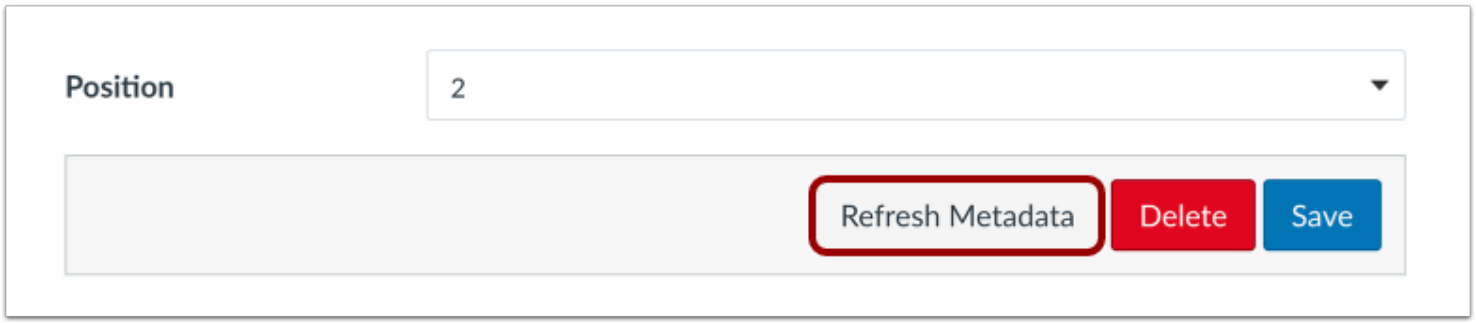
Manage Provider



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.

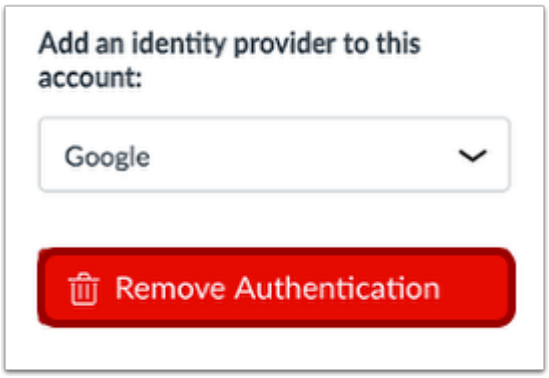
To delete the provider, click the **Delete** button [2].

Manage SAML Authentication



If you are using SAML authentication, you can manually refresh SAML metadata by clicking the **Refresh Metadata** button.

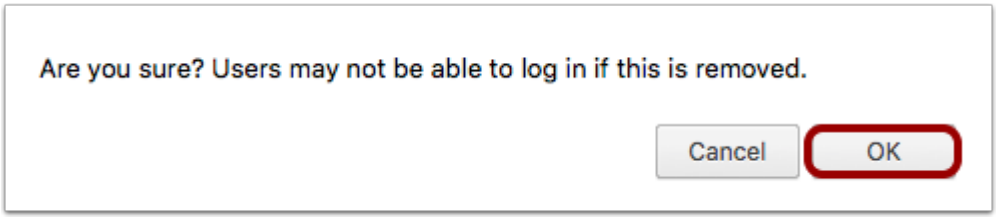
Remove Authentication



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

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

Confirm Removal



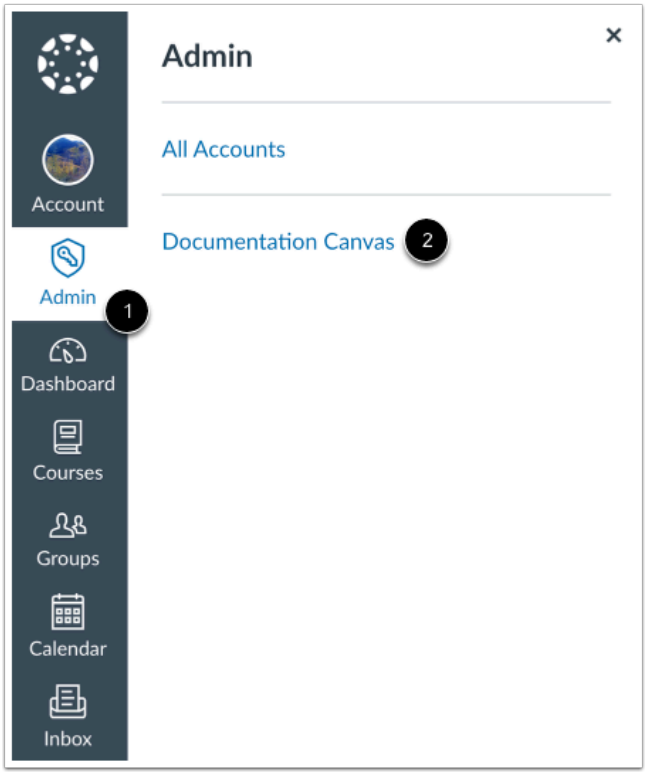
Removing all authentication methods may affect your students' ability to log in to Canvas. To confirm, click the **OK** button.

How do I configure SSO settings for my authentication provider?

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

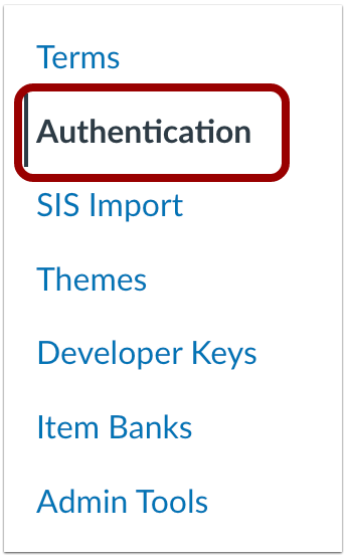
SSO links inherit settings from the Theme Editor. Links can be updated in the Theme Editor Login section.

Open Account



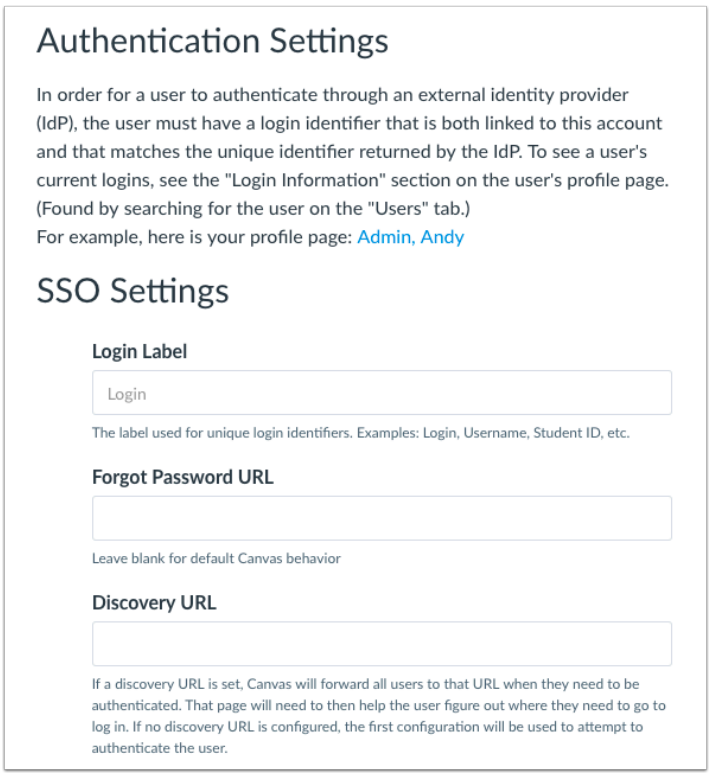
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Authentication



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

Configure SSO Settings



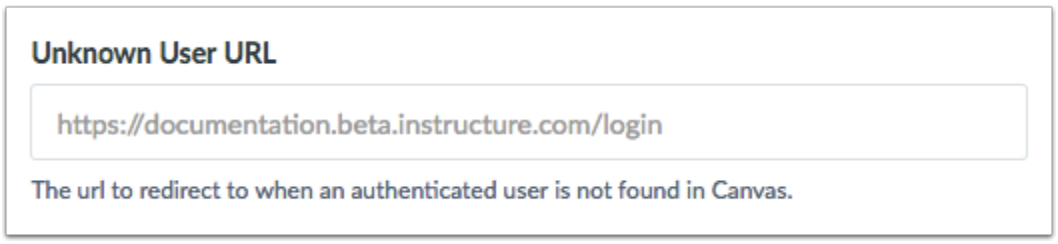
In the SSO Settings section, enter details for the appropriate fields.

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

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

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

Set Third-Party Unknown User URL



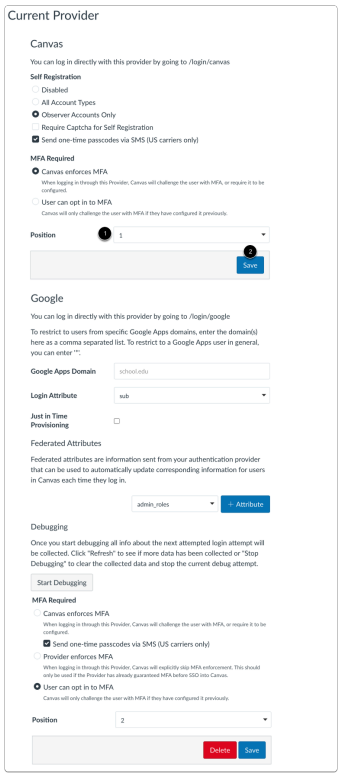
When using a third-party authentication provider, you can also enter a URL that redirects users if an authenticated user is not found in Canvas.

Save SSO Settings



Click the **Save** button.

Set Provider Positions



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

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

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

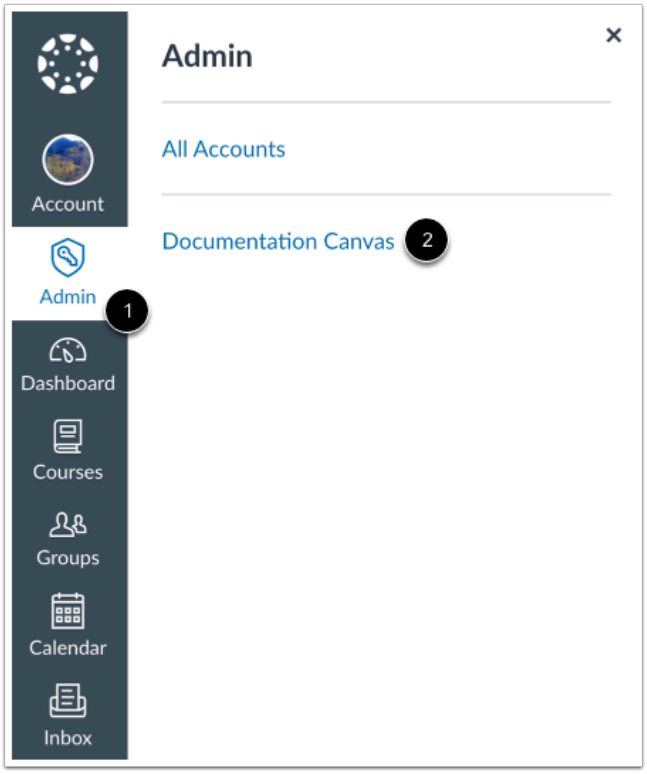
How do I manage Canvas password requirements and login attempts for an account?

If the *Enhance password options* setting is enabled in Account Feature Options, you can customize login policies in Authentication Settings. You can customize password requirements and control the number of login attempts allowed.

Notes:

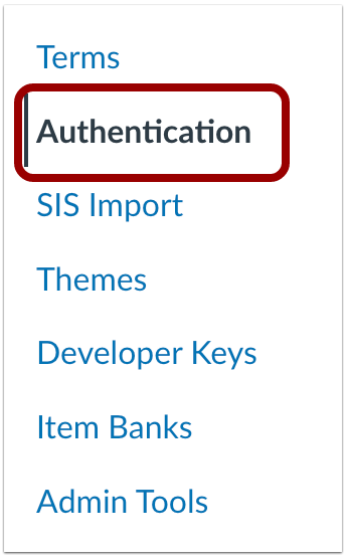
- Currently, users with existing passwords that do not comply with updated policies cannot be prompted to update their passwords. Passwords in Canvas are cryptographically hashed and not stored in plain text, making it impossible to identify password violations.
- Administrators setting passwords on behalf of another user may not currently be required to follow the password requirements, depending on configuration options, which can only be activated by Instructure.
- SIS imports of passwords may not currently be required to comply with the password requirements. SIS import errors may or may not occur after an SIS import, depending on configuration settings. If an institution is uploading passwords via SIS import, it is recommended to validate that the passwords meet the password requirements before uploading.

Open Account



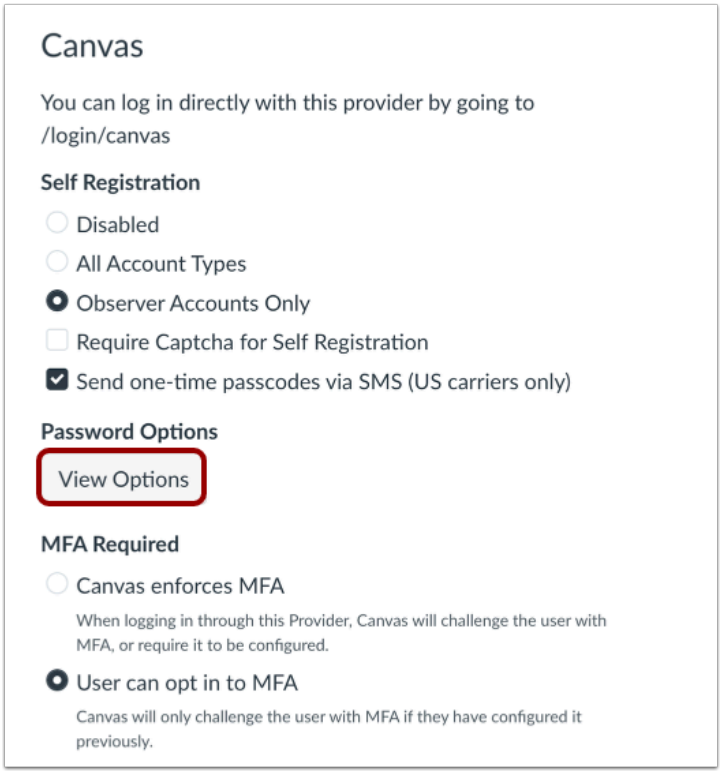
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Authentication



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

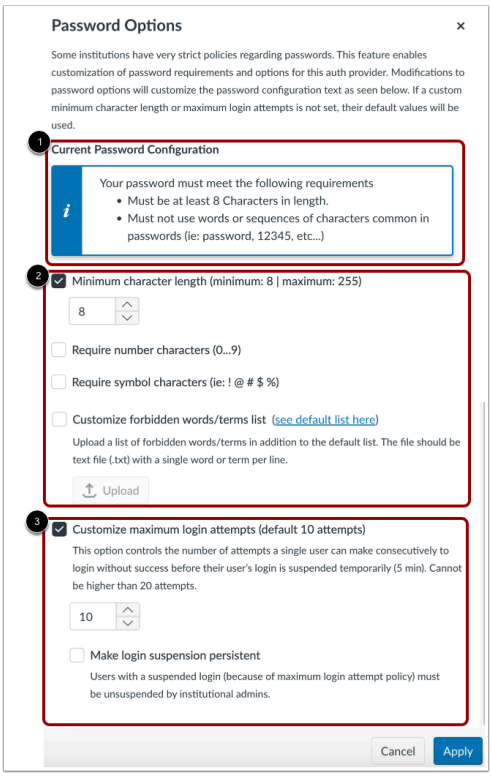
Open Password Options



In the Password Options section of Authentication Settings, click the **View Options** button.

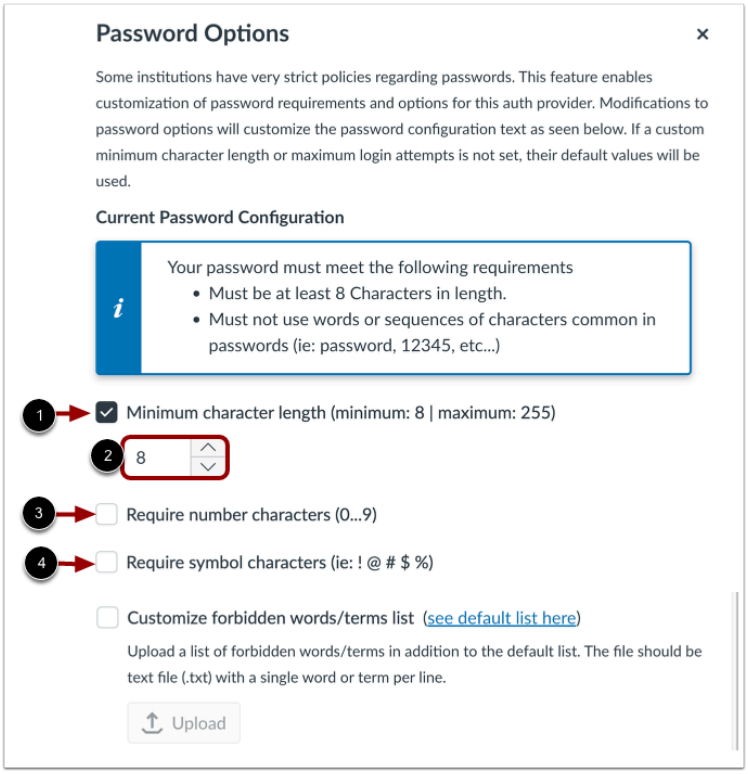
Note: The View Options button in the Password Options section is only available when the *Enhance password options* setting is enabled in Account Feature Options.

View Password Options



In the Password Options tray, you can view the current password requirements [1], edit password requirements [2], and manage login attempts [3].

Edit Password Requirements



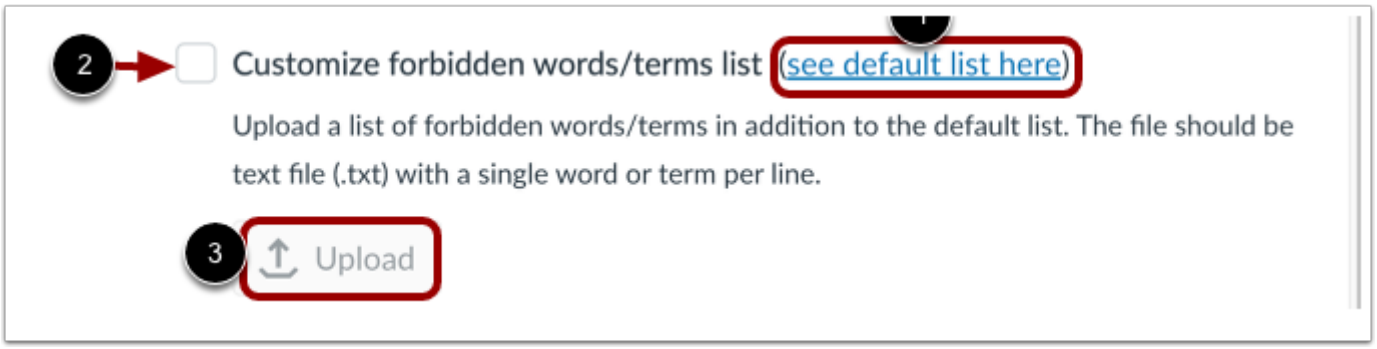
By default, user passwords must include a minimum number of eight characters. To increase the minimum number of characters required in passwords, keep the **Minimum character length** checkbox enabled [1]. Then, enter a number in the minimum character length field or click the up and down arrows [2]. (The minimum character length must be at least eight and no greater than 255.)

To allow passwords of any length, click the **Minimum character length** checkbox to disable the length requirement.

To require user passwords to include numbers, click the **Require number characters (0...9)** checkbox [3].

To require user passwords to include symbols, click the **Require symbol characters (ie. !@#$%)** checkbox [4].

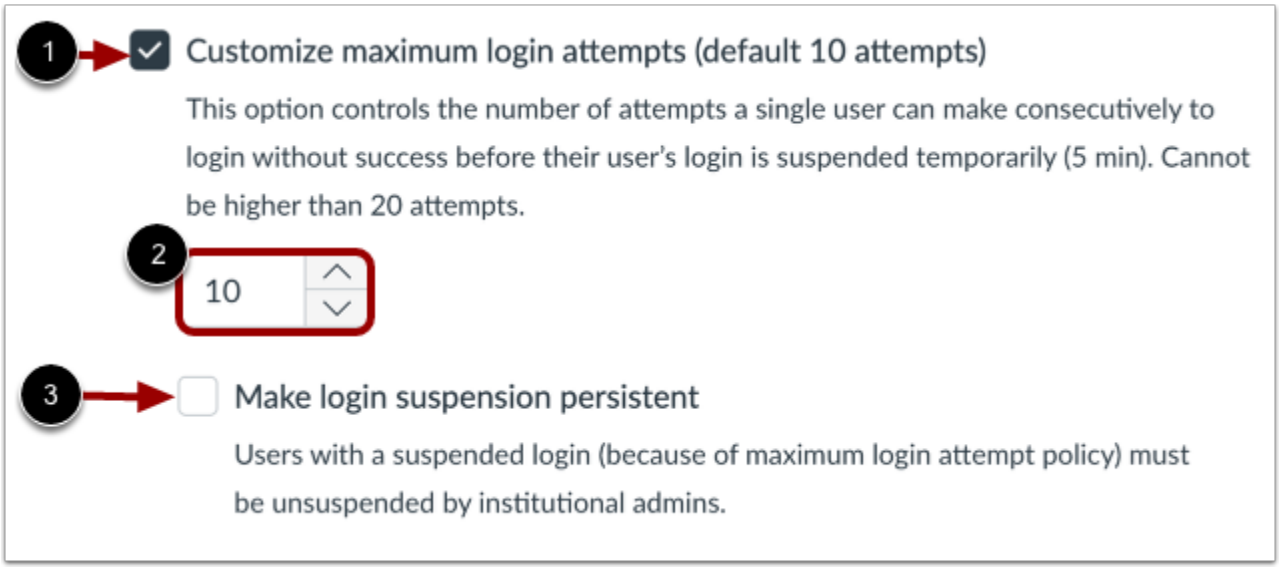
Customize Forbidden Words/Terms



By default, some words/terms are forbidden; users cannot include them in their passwords. To view a list of the default forbidden words/terms, click the **see default list here** link [1].

To add your own words/terms to the default list of forbidden words/terms, click the **Customize forbidden words/terms list** checkbox [2]. Create a TXT file containing one word/term per line. Then, click the **Upload** button [3] and select the text file.

Manage Login Attempts



When a user exceeds the maximum number of login attempts, their account is suspended for five minutes. After five minutes, the user can try to log in again, but the user is not allowed more than 20 attempts.

By default, a single user is allowed ten unsuccessful consecutive login attempts before their account is suspended. To change the maximum number of allowed attempts before an account is suspended, click the **Customize maximum login attempts** checkbox [1]. Then, enter a number in the **Maximum Login Attempts** field or click the up and down arrows [2].

To require suspended accounts to be unsuspended by an institution admin, click the **Make login suspension persistent** checkbox [3].

Apply Password Options



Click the **Apply** button.



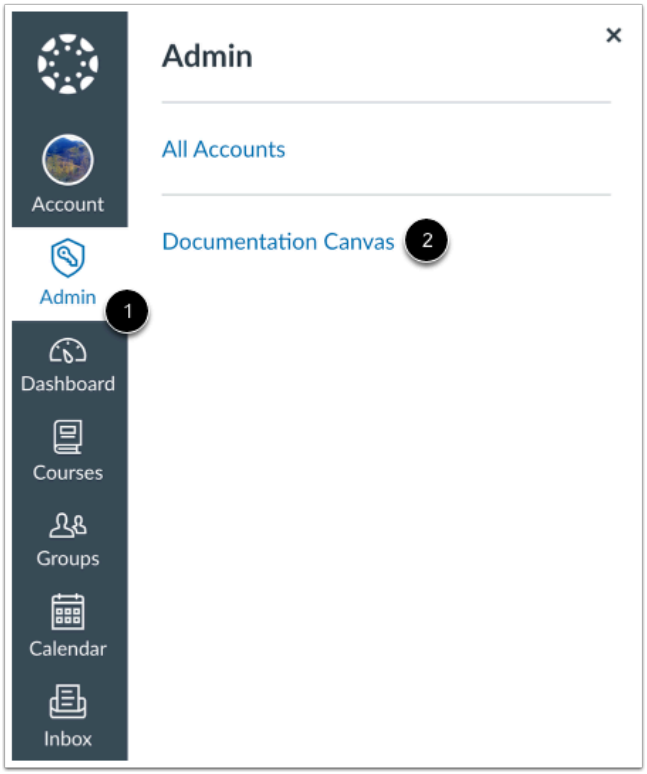
A banner message confirms password setting changes.

Calendar

How do I manage Account Calendars?

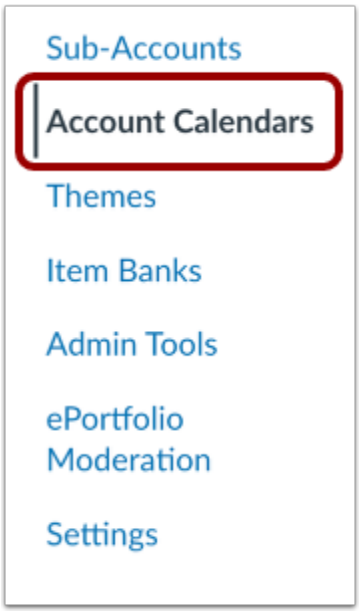
As an admin or sub-account admin, you can manage an account calendar with events and important dates that display for users. In Canvas Calendars, instructors, students, and observers have the option to subscribe to Account Calendars in the Other Calendars section.

Open Account



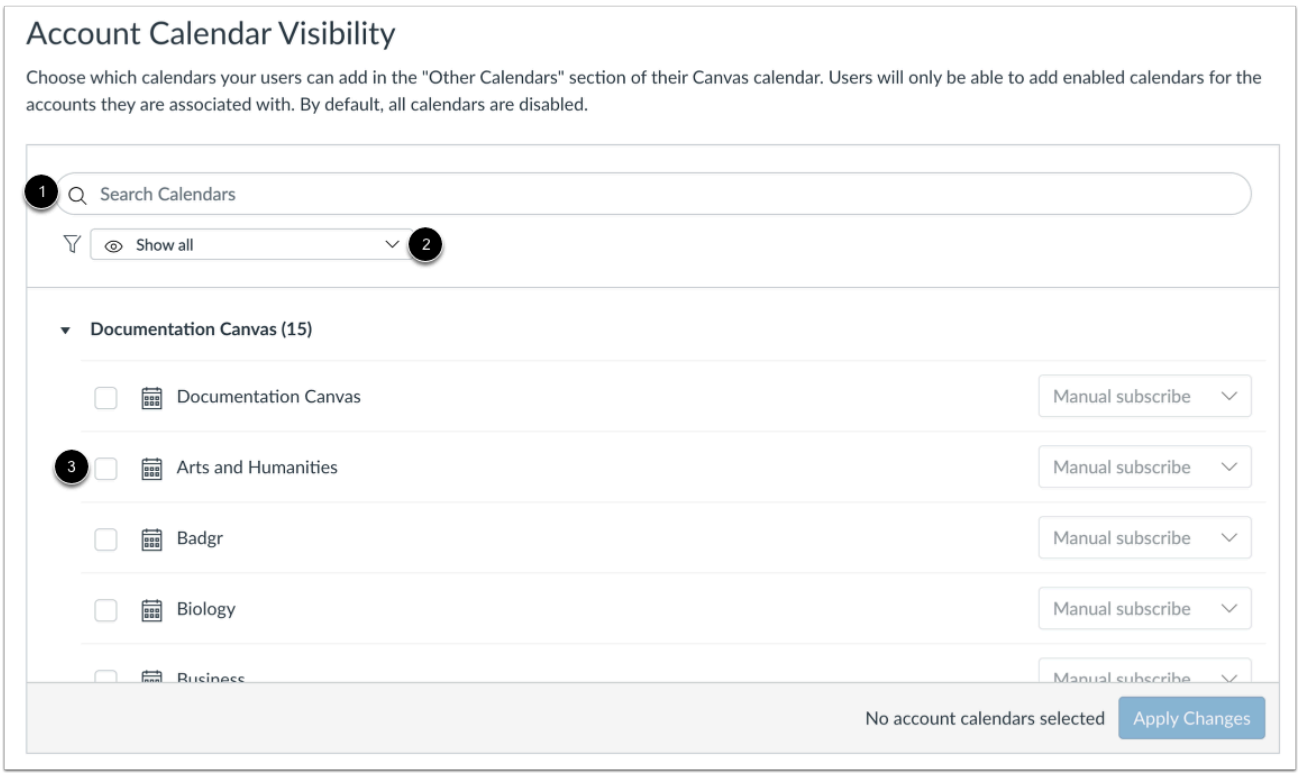
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Account Calendars



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

View Account Calendars

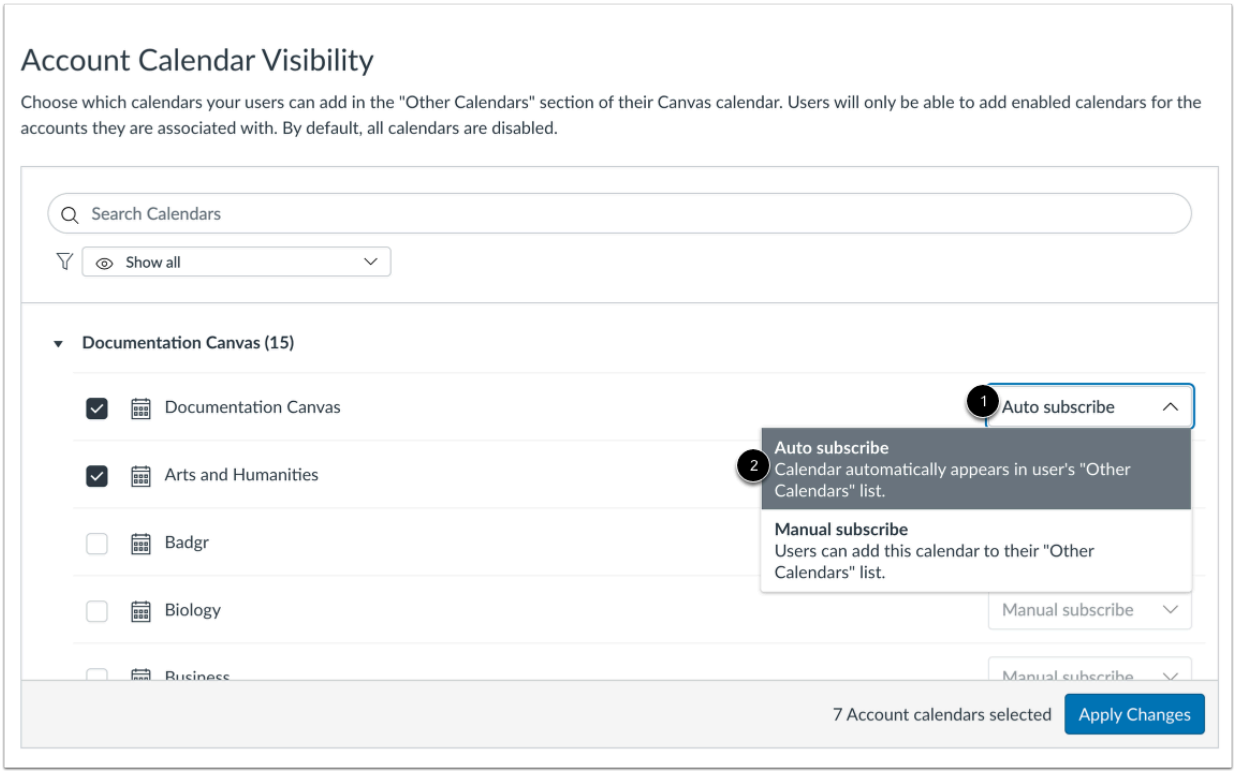


The Account Calendar Visibility page displays all available account calendars for your institution.

To filter account calendars, enter the account calendar name in the **Search** field [1] or click the **Show All** drop-down menu [2].

By default, all calendars are disabled. To allow users to add calendars to their Canvas calendar, click the checkbox next to the account name [3].

View Account Calendars Subscription Options

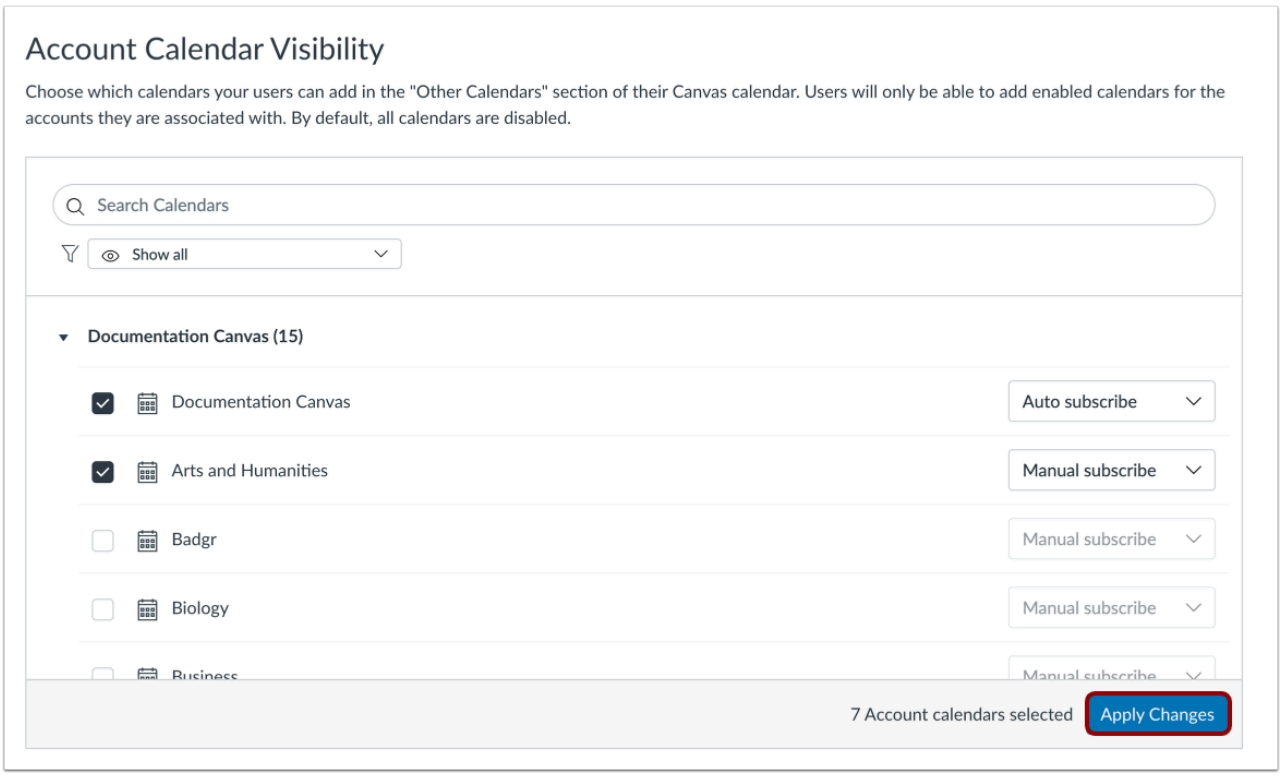


By default, all calendars are set to the manual subscribe option where users have the option to add the account calendar to their Other Calendars list.

To automatically display the account calendar in the user's Other Calendars list, click the **Manual subscribe** drop-down menu [1] and select the **Auto subscribe** option [2].

Note: To change the subscription option, you must click the checkbox next to the calendar name first.

Apply Selected Account Calendars



After selecting the account calendars, click the **Apply Changes** button. Users will be able to view and subscribe to the account calendar.

Note: To remove the account calendars, deselect the checkbox next to the account calendar name and click the **Apply Changes** button.

How do I add an event to an account calendar?

As an admin or sub-account admin, you can create an account calendar with events and important dates that display for users. In Canvas Calendars, instructors, students, and observers have the option to subscribe to Account Calendars in the Other Calendars section.

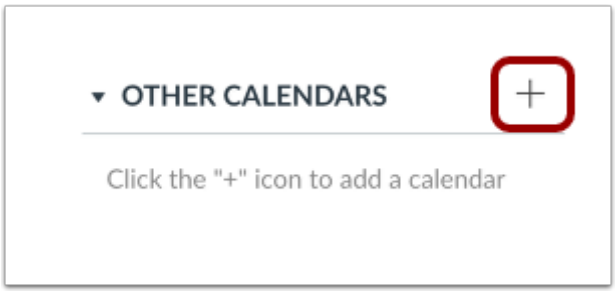
Note: You must make the account calendar visible before adding events.

Open Calendar

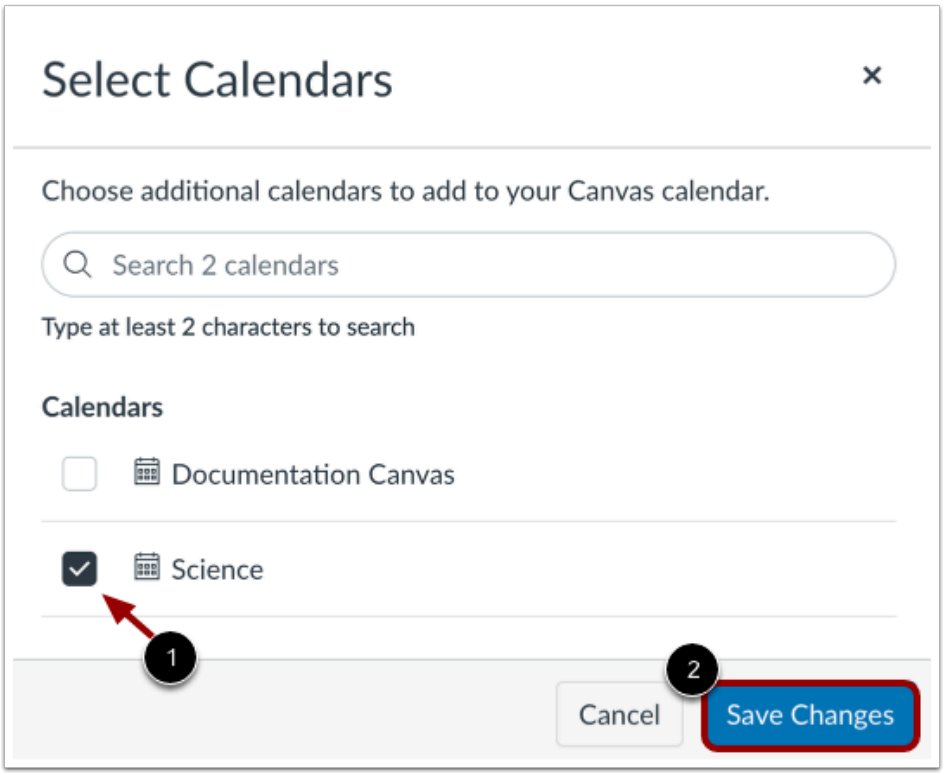


In Global Navigation, click the **Calendar** link.

Add Account Calendar

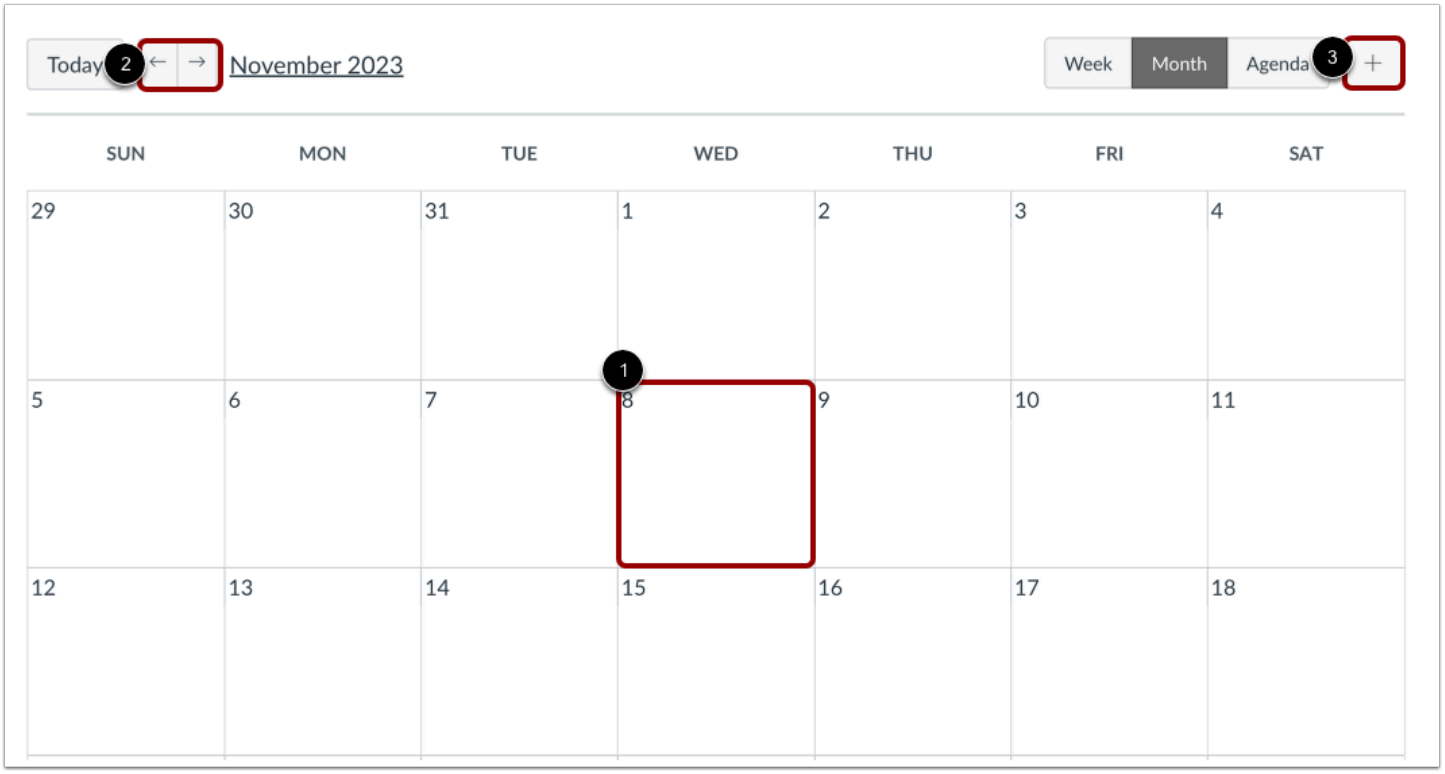


Click the **Add** icon.



To add additional calendar(s) to your Canvas calendar, click the checkbox next to the calendar [1] and click the **Save Changes** button [2].

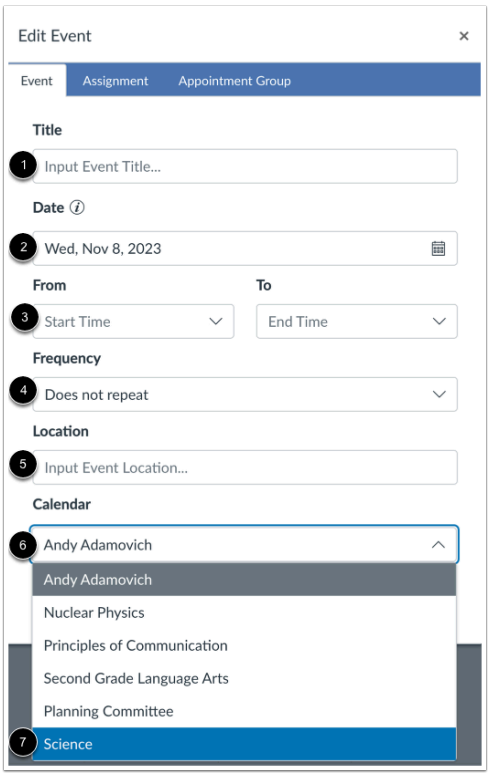
Add Event



Click any date on the calendar to add an event [1]. Or, click the arrows next to the month name to navigate to a different month [2] and select a date.

If you don't want to manually locate the date, you can click the **Add** icon [3].

Add Event Details



Enter a title for the event [1].

Depending on how you added your event, the date may be populated for you. If not, enter a date in the date field [2].

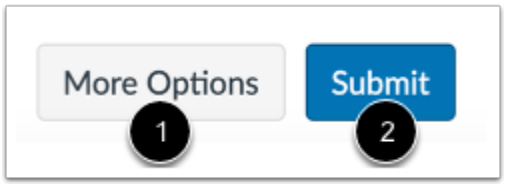
The calendar times may also be populated for you in the From fields [3]. To edit, use the dropdown or enter the start and end time for your event. To create an all-day event, leave the From fields blank so there is no start and end time for your event.

In the **Frequency** drop-down menu, you can set recurring calendar events [4].

You can enter a location [5].

In the **Calendar** drop-down menu [6], select the account calendar [7].

Submit Event



To add additional details to your event, click the **More Options** button [1]. You can use the Rich Content Editor to add a description or resource links and add an address location.

If you only want to create the event as a placeholder and add details later, click the **Submit** button [2]. You can edit your event at any time.

How do I create a recurring event in an account calendar as an admin?

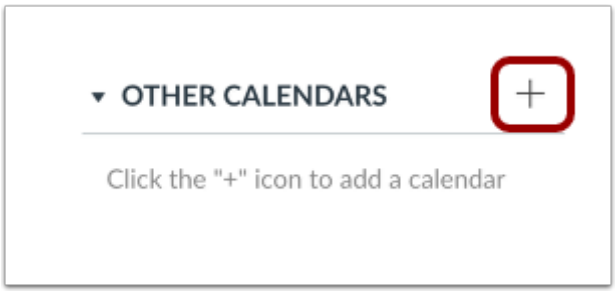
As an admin or sub-account admin, you can create a recurring event in an account calendar that display for users. You can also edit or delete recurring events and apply those changes or deletions to the recurring events.

Open Calendar

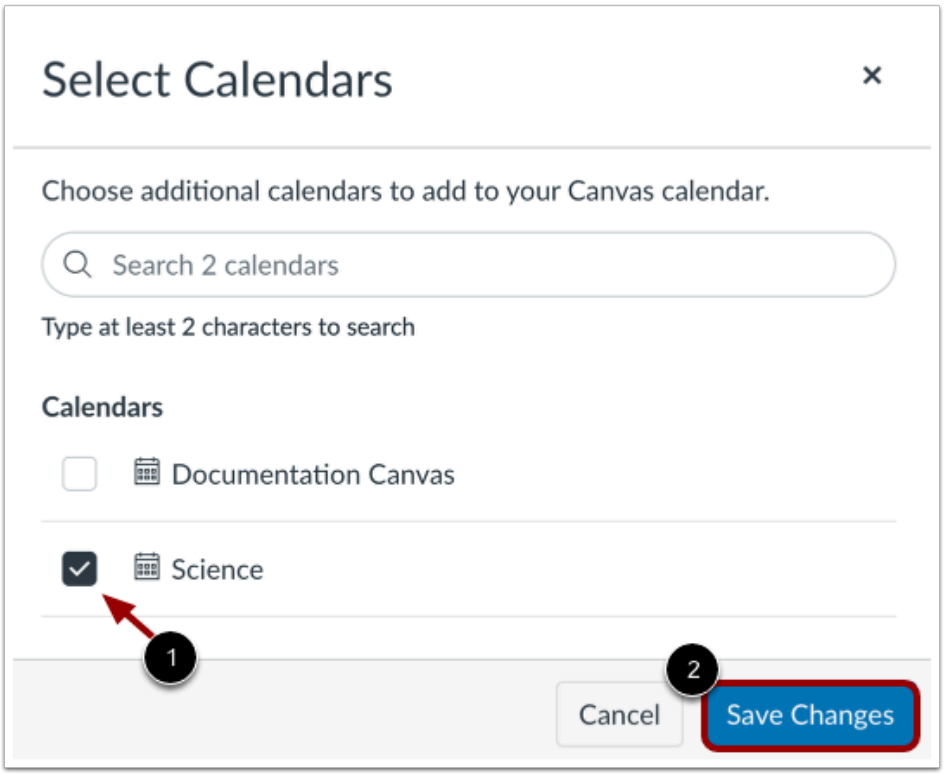


In Global Navigation, click the **Calendar** link.

Add Account Calendar

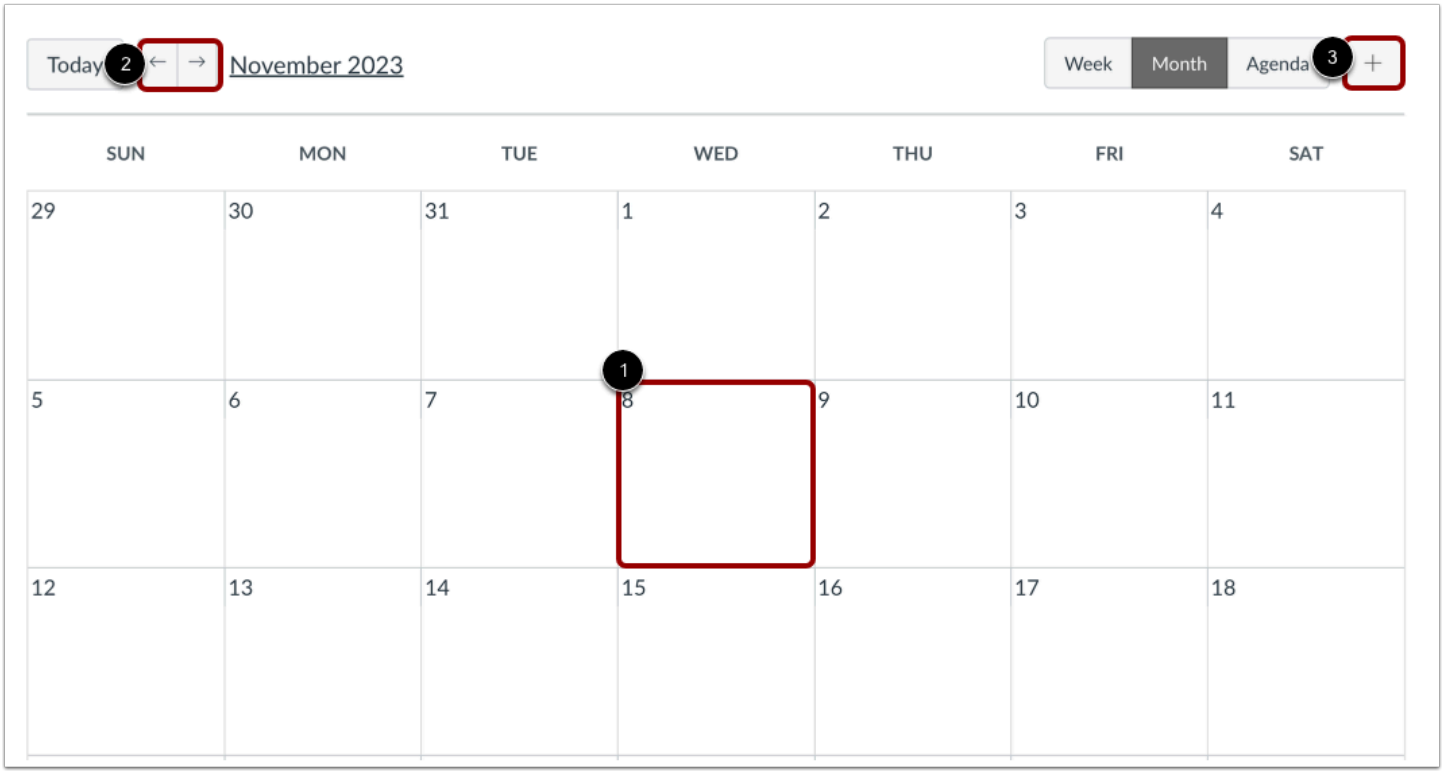


Click the **Add** icon.



To add additional calendar(s) to your Canvas calendar, click the checkbox next to the calendar [1] and click the **Save Changes** button [2].

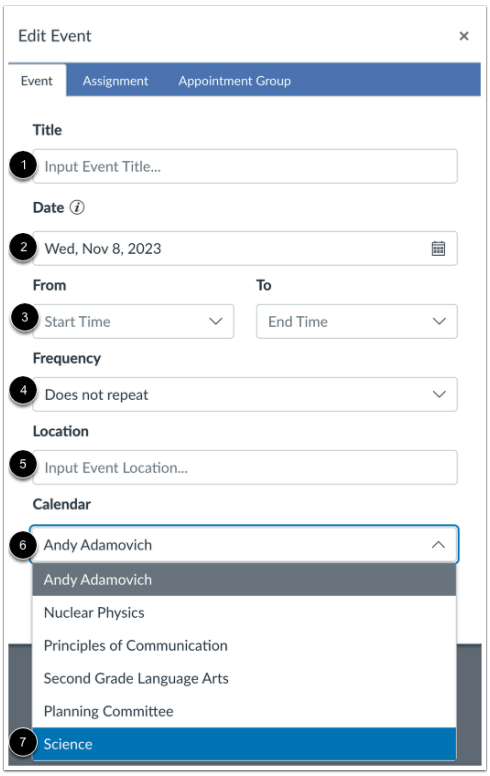
Add Event



Click any date on the calendar to add an event [1]. Or, click the arrows next to the month name to navigate to a different month [2] and select a date.

If you don't want to manually locate the date, you can click the **Add** icon [3].

Add Event Details



Enter a title for the event [1].

Depending on how you added your event, the date may be populated for you. If not, enter a date in the date field [2].

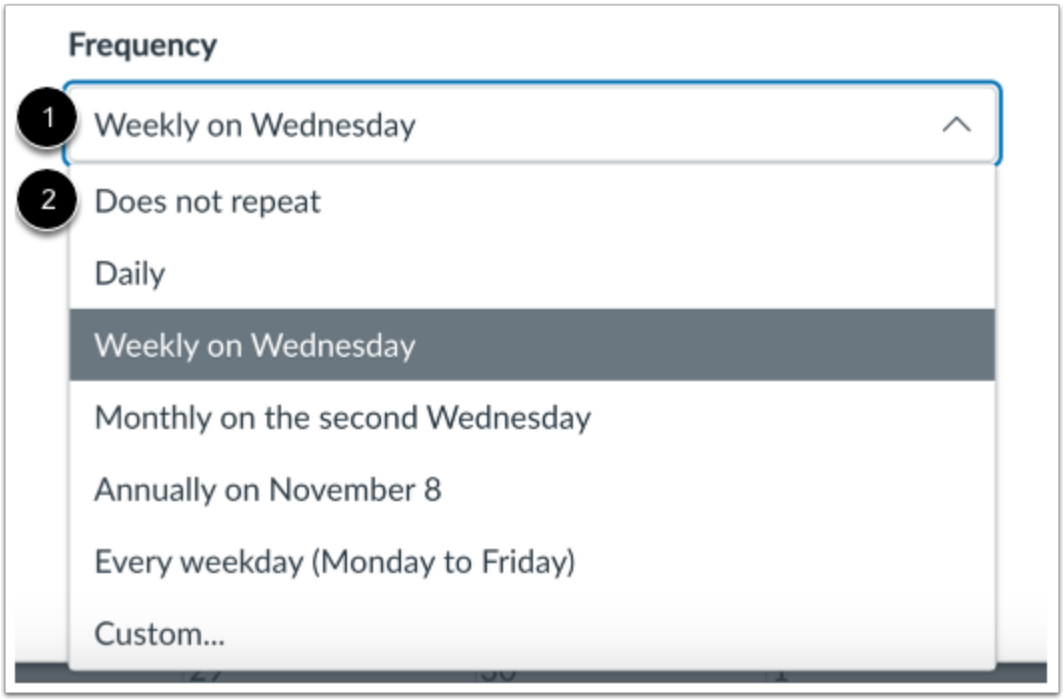
The calendar times may also be populated for you in the From fields [3]. To edit, use the dropdown or enter the start and end time for your event. To create an all-day event, leave the From fields blank so there is no start and end time for your event.

In the **Frequency** drop-down menu, you can set recurring calendar events [4].

You can enter a location [5].

In the **Calendar** drop-down menu [6], select the account calendar [7].

Add Event Frequency

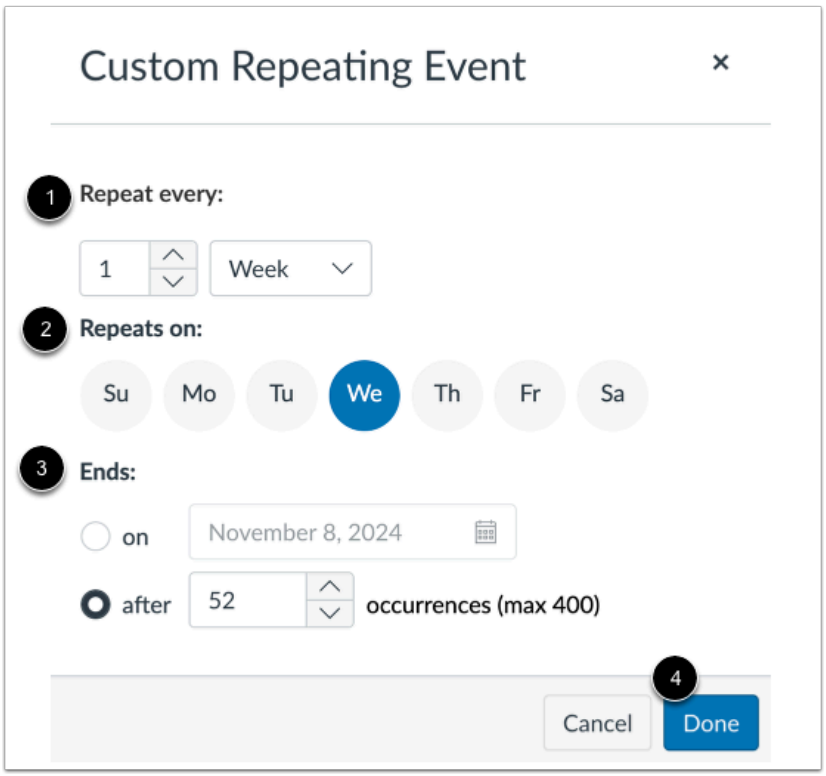


In the **Frequency** drop-down menu [1], you can select from multiple recurring options, including no repeat, daily, weekly, monthly, annually, every weekday, or a custom frequency.

Notes: Each frequency selection has an occurrence default:

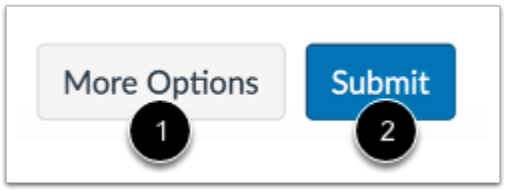
- daily = 365 (days in a year)
- weekly = 52 (weeks in a year)
- monthly = 12 (months in a year)
- annually = 5 (The event will occur for five years)
- every weekday = 52 * 5 (weeks in a year * weekdays)
- Additionally, users can have a maximum of 400 occurrences.

Add Event Custom Frequency



To create a custom recurring event, select how often the event repeats [1], which day(s) it repeats on [2], and when it ends [3]. Click the **Done** button [4].

Submit Event



To add additional details to your event, click the **More Options** button [1]. You can use the Rich Content Editor to add a description or resource links and add an address location.

If you only want to create the event as a placeholder and add details later, click the **Submit** button [2]. You can edit your event at any time.

Canvas Consortium

What is a Centralized Canvas Consortium?

A centralized consortium allows child accounts to inherit settings and permissions from the parent account.

Note: Decentralized consortiums do not have the same connections as a centralized consortium.

Roles and Permissions

Roles and permissions are inherited from the parent account to the child account in centrally managed consortiums.

- Permission overrides are available in the child account unless they are locked.

- Permissions can be locked at the parent account level and the child account can view but not override the permission.

Note: Child accounts can override unlocked permissions.

Account Settings Inheritance

The following are how child accounts inherit parent account settings.

- Child accounts inherit parent account settings.

- Child accounts inherit certain parent account settings, however, the child account does not have visibility or control to change the settings.

- Child accounts can view locked settings but cannot change the locked settings.

- Child accounts can view and modify unlocked settings.

Integrations

In Child Account Settings, the Integrations tab is not displayed. The Integrations tab is only displayed in the parent account settings and all settings are inherited.

Notifications

Notifications do not display in child accounts. All notification settings are inherited from the parent account.

Themes Inheritance

The following are how child accounts inherit parent account themes.

- Child accounts inherit theme settings and configurations.

- Parent accounts can lock child accounts from editing themes.

- Child accounts settings are inherited from the parent account but are not visible.

- Child accounts can use the parent account theme by clicking the Default Theme option.

- Child accounts can create a new theme based on the parent account theme configuration.

Developer Keys

Edits to developer keys in parent accounts automatically sync in child accounts for centrally managed Consortium accounts.

Current Limitations of Centralized Consortiums

The following features are not inherited by child accounts.

- EduApp tokens

- Grading periods

- Grading schemes

- LTI tool configurations

- Outcomes

- Quiz item banks

- Quiz questions

- Quotas

- Rubrics

- Terms

How do Canvas Consortiums use trust accounts?

Canvas accounts can be configured as a part of a consortium, a trust, or both.

A Canvas consortium includes a parent (or root) account with associated child (or subaccount) accounts. A parent account has access to view and manage child account content and child account settings.

A trust relationship allows one Canvas account to trust another Canvas account and allows users to be enrolled in both accounts.

Canvas Consortium and Trust Accounts

When a consortium is created, a one-way trust is put in place. The child instances trust the users of the parent instance, so any users in the parent instance are able to be enrolled in courses in the child instances. When configuring a new consortium, two optional settings can be enabled. These are *disabled* by default:

- Automatically create a web of trust when creating new account
- Automatically have the parent instance trust new child instances

Canvas Consortiums Types

- **Single Account Consortium:** A parent account can view and manage child accounts. Single instance consortium examples:
  - A large school district that oversees a group of schools, but does not manage data (separate authentication domains, possible even separate SIS databases).
  - A content provider which allows customers to opt-in to use their Canvas account. They provide the learning environment, but each customer is a separate organization.
- **Basic Consortium**: The child accounts have a default trust relationship with the parent account (one-way trust). The parent does not trust the child accounts. The child accounts can set up trust relationships with one another, but it is not required. This type of consortium is common among statewide or countywide organizations.
- **Mixed Consortium**: There is a web of trusts between multiple child accounts, the child accounts also trust the parent account. This type of consortium is common among statewide or countywide organizations.
- **Auto-Merge Consortium**: This could be a basic or mixed consortium with an added setting that will auto-merge similar users. This setting utilizes the integration_id identifier value in Canvas. This type of consortium is more common among institutions that have separate instances because of their size.

Trust Account Relationships

A trust account relationship allows one Canvas account to trust another Canvas account and allows users to be enrolled in both places. Instead of creating two separate accounts and merging them together, a trust relationship allows separate Canvas accounts to share user identities, so a user can log in to one account and access courses from both accounts.

Note: Trust account settings are established during implementation. Trust account relationships can be established between multiple accounts.

Trust Behaviors

- Trusts do not show information in the user interface indicating an account is in a trust relationship with another institution or that the course a user is enrolled in is at another institution.
- Trusts do not provide data on which users are in a trust enrollment at another institution.
- The Canvas interface does not show provided trust data. The trust relationship is simply an invisible link that exists between two or more sites.
- User lists from one institution cannot be browsed from another institution. Admins from both institutions need to work out a business process to send enrollments from one institution to the other.
- Trust accounts do not provide any automation for trust enrollments. Users are enrolled via CSV uploads or via the API.
- Users enrolled in courses at other institutions are only able to see the name of the course they are enrolled in. They cannot view any information in the interface that shows the course is located at another institution.

Trust Account Definitions

User	A person with a login and user profile in at least one Canvas account. With multiple Canvas accounts, the person has a separate login and user profile for each account. However, the login and profile may contain identical information, such as the same email address used as login credentials.
Merged User	A user with multiple Canvas accounts merged together to use one profile. For each Canvas account, the user's login may be unified by a central authentication system or retained individually through Canvas authentication.
Login	A username and password tied to a specific Canvas account used for login credentials. A login must be unique to a user and is required to authenticate a specific Canvas account. However, a user may have the same username (such as an email address) or password as login credentials for multiple accounts.
Trust Link	A virtual link between two Canvas accounts. The trust link goes in one direction from one canvas account to another. However, the interface does not indicate a trust is present.
Canvas Account	A Canvas configuration with a unique URL (i.e. institution.instructure.com). For the purpose of trusts, Canvas accounts do not refer to subaccounts.
Integration ID	A secondary identifier useful for more complex SIS integrations. An integration ID can be used for a user without affecting the user's SIS ID.

How do I set details for a Canvas Consortium account?

This lesson applies to institutions involved in a Canvas Consortium.

As an admin, the Account Settings tab contains multiple settings you can manage in your Canvas Consortium account.

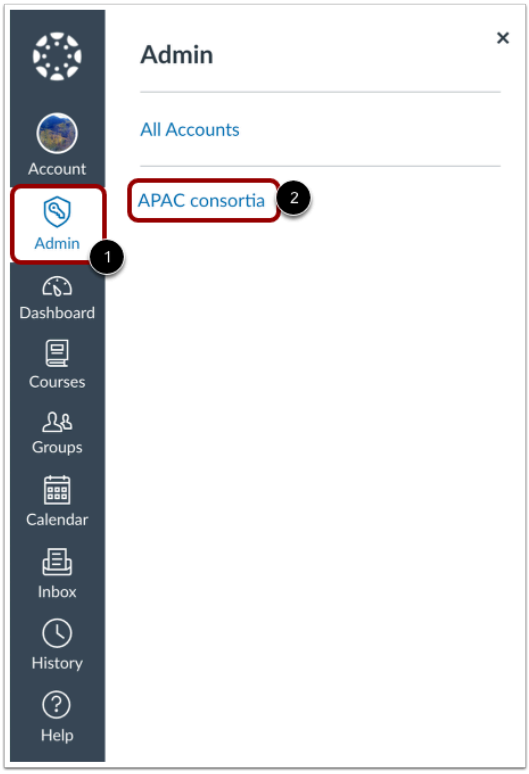
In a Canvas Consortium account, the Account Settings Inheritance policy allows parent account admins to configure account settings in the parent account which are inherited in child accounts.

Not all settings and options are available to child account admins. The following restrictions apply to child account admins:

- Child account admins cannot manage the following account options and restriction settings: Default Time Zone, Allow Self-Enrollment, Login Label, Trusted HTTP referrers, Students can opt-in to receiving scores in email notifications, and Restrict students from viewing quiz questions after course end date.
- Child account admins can only enable Equella, Turnitin, Analytics, and User Avatars.
- Child account admins cannot customize links for the help dialog box by default.
- Child account admins cannot enable web services by default.
- Child account admins cannot choose who can create new courses by default.
- Child account admins cannot enable personal pronouns within a child account.

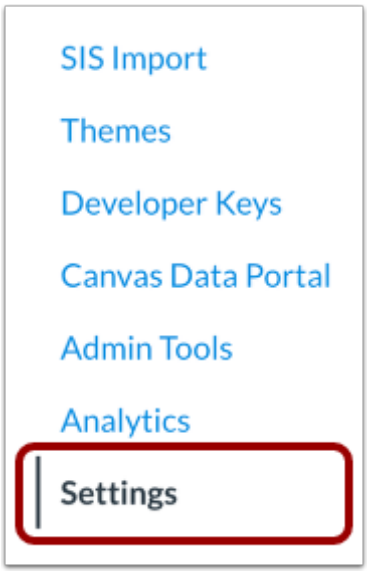
Note: This lesson indicates the settings that you can manage for your entire consortium. Additional integrations may be available with the assistance of your Customer Success Manager.

Open Account



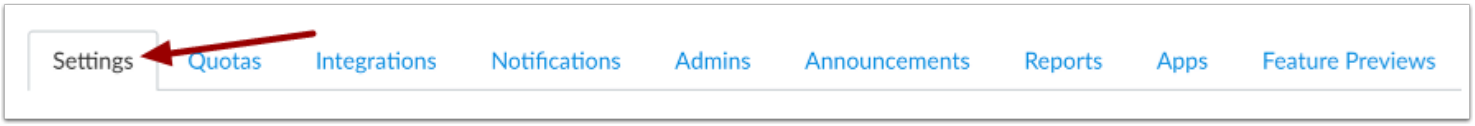
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Settings



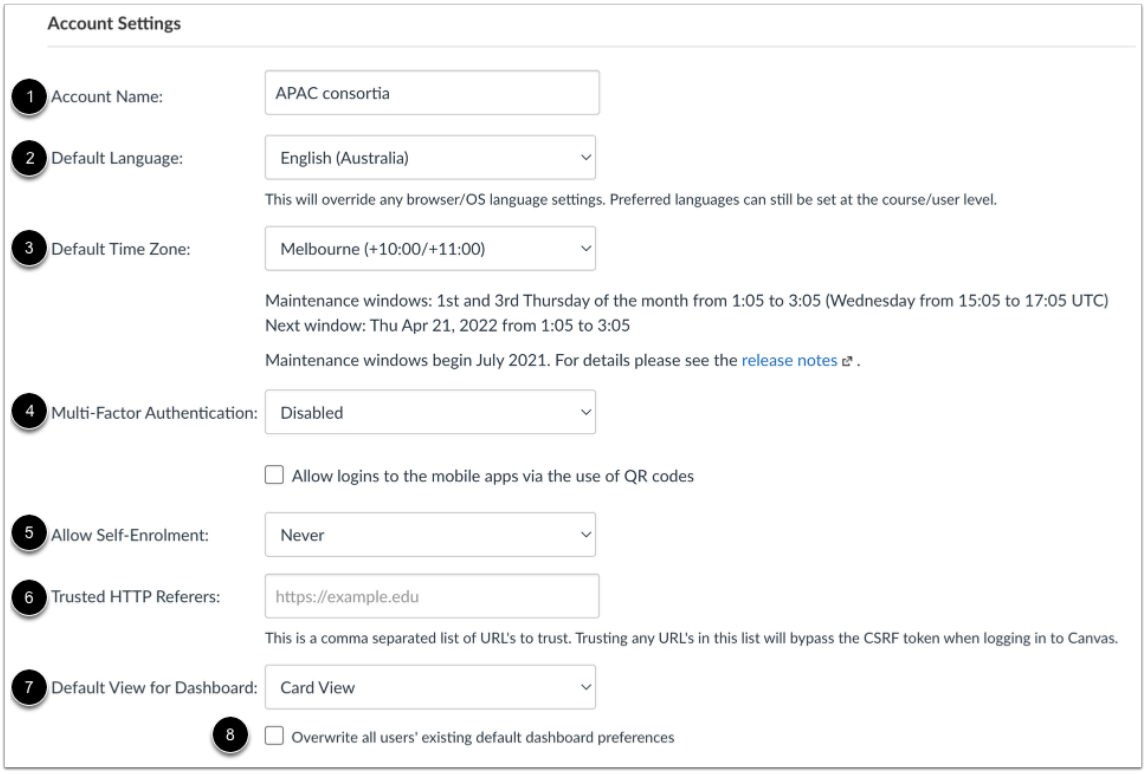
In Account Navigation, click the **Settings** link.

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

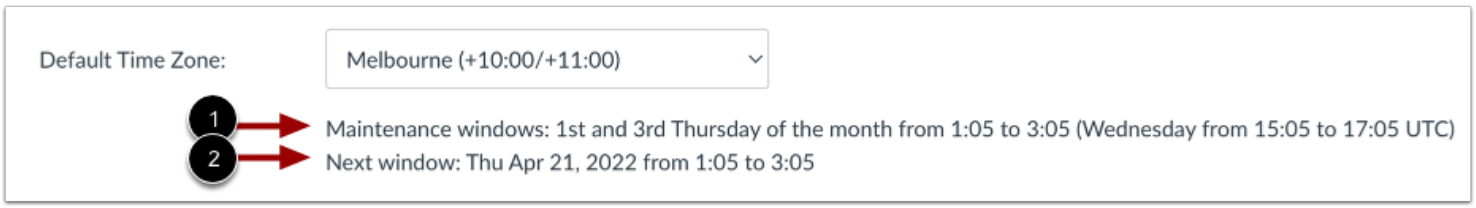


The Account Settings section allows you to specify settings for the entire consortium account, including account name [1], default language [2], default time zone [3], Multi-Factor Authentication [4] and self-enrollment [5].

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

You can set a default view for the Dashboard using the **Default View for Dashboard** drop-down menu [7]. Default options include Recent Activity, List View, and Card View. The setting defaults to the Card View. Specifying a default view applies to all new account users. Once a user has selected a different view, the default no longer applies. If you want to apply the selected default view to all users in the account, click the **Overwrite all users' existing default dashboard preferences** checkbox [8]. However, users can change their dashboard view at any time in the dashboard options menu.

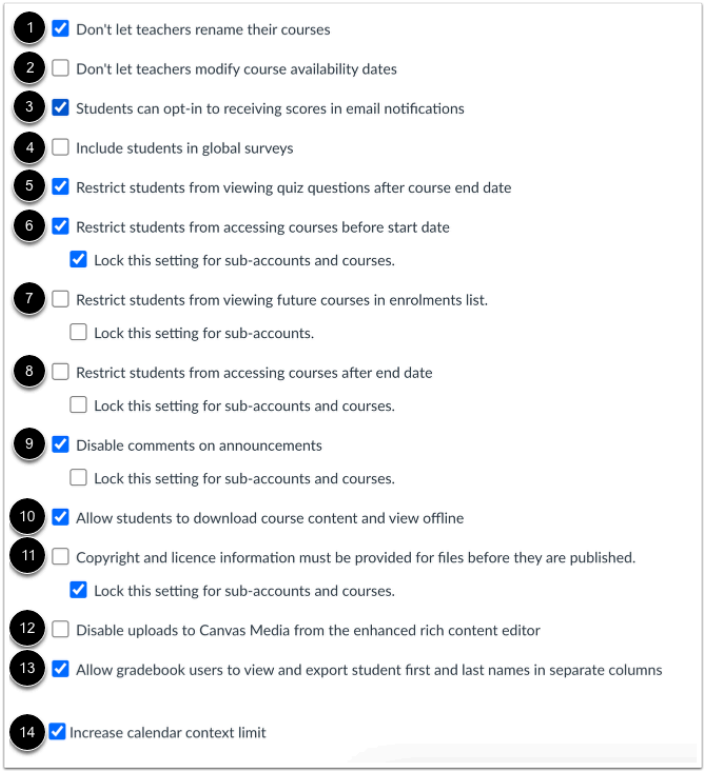
View Maintenance Window



The Default Time Zone settings also display the maintenance windows for your account. You can expect that all maintenance for your account will occur during your maintenance window, unless emergency maintenance is required. Even though the windows are two hours each, your expected downtime shouldn't last for more than a few minutes. It is also possible that maintenance will not be necessary during your scheduled maintenance windows.

You can view the regular cadence when your maintenance windows take place [1] as well as the specific date and time of your next maintenance window [2].

View Restriction Settings



You can also manage restriction settings for the entire consortium account.

If you do not want instructors to be able to rename their courses, click the **Don't let teachers rename their courses** checkbox [1].

If you do not want instructors to modify course availability dates, click the **Don't let teachers modify course availability dates** checkbox [2]. This checkbox does not display in the Account Setting page for child accounts.

To allow students to opt-in to receive scores as part of grading notifications, click the **Students can opt-in to receiving scores in email notifications** checkbox [3]. When this option is enabled, the user's Notification Settings 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.

To allow students to be included in global surveys, click the **Include students in global surveys** checkbox [4].

If you do not 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 [5].

You can choose to restrict student access to view courses before the course start date [6].

If you choose to restrict students from accessing courses before the start date, you can also restrict students from viewing future courses in their enrollments list [7].

You can also choose to restrict student access to view courses after the course end date [8].

You can also disable comments on announcements in all courses [9].

To allow students to download course content and view content offline for all courses, select the **Allow students to download course content and view offline** checkbox [10]. Alternatively, if you'd prefer to allow students to download course content and view content offline for specific courses, you can enable the ePub Exporting feature option for the course.

You can require that copyright and license information be provided for files before they are published [11].

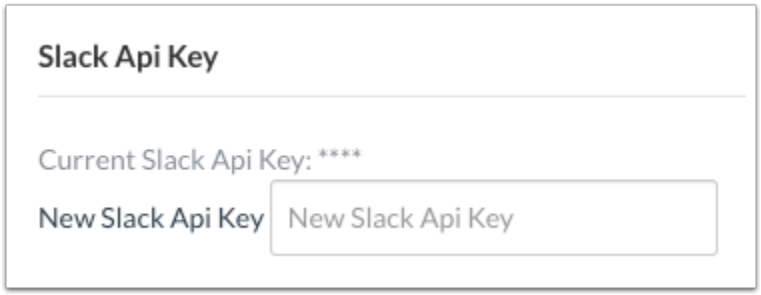
You can also disable Canvas media uploads in the Rich Content Editor [12].

You can allow the option to split student names into two separate columns and show first and last names separately in the Gradebook [13].

Institutions can increase the list of displayed calendars from 10 to 15. This checkbox applies to all users in the account [14].

Note: Settings managed in the parent account are inherited and locked at the child account.

View Slack API Key

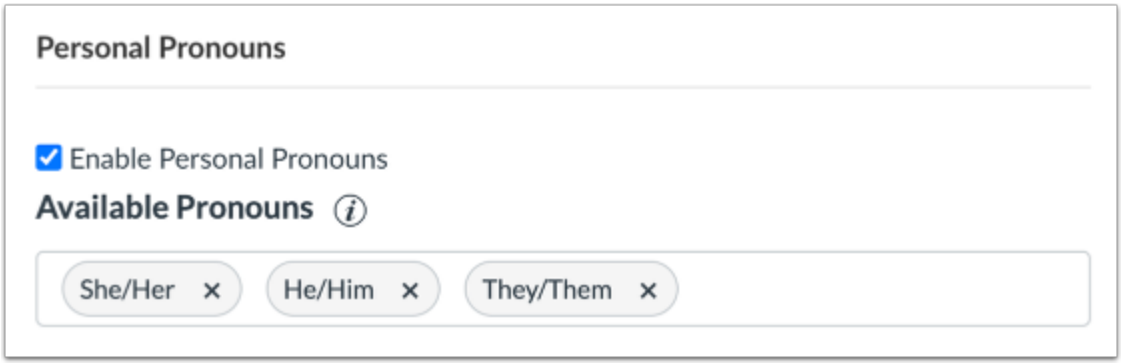


You can add a Slack API key in Account Settings to allow users to receive notifications in Slack. The Slack API Key is generated from an app created using the Slack API. To add a new Slack API key, type the Bot User OAuth Access Token copied from Slack in the **New Slack Api Key** field.

Learn more about creating a Slack App for your institution.

Note: Creating a Slack App and generating an Access Token requires that you are also an admin user in Slack.

View Personal Pronouns



The Personal Pronouns section allows you to enable and customize personal pronoun options in your account. When enabled, users can select a pronoun to display after their username in several areas in Canvas.

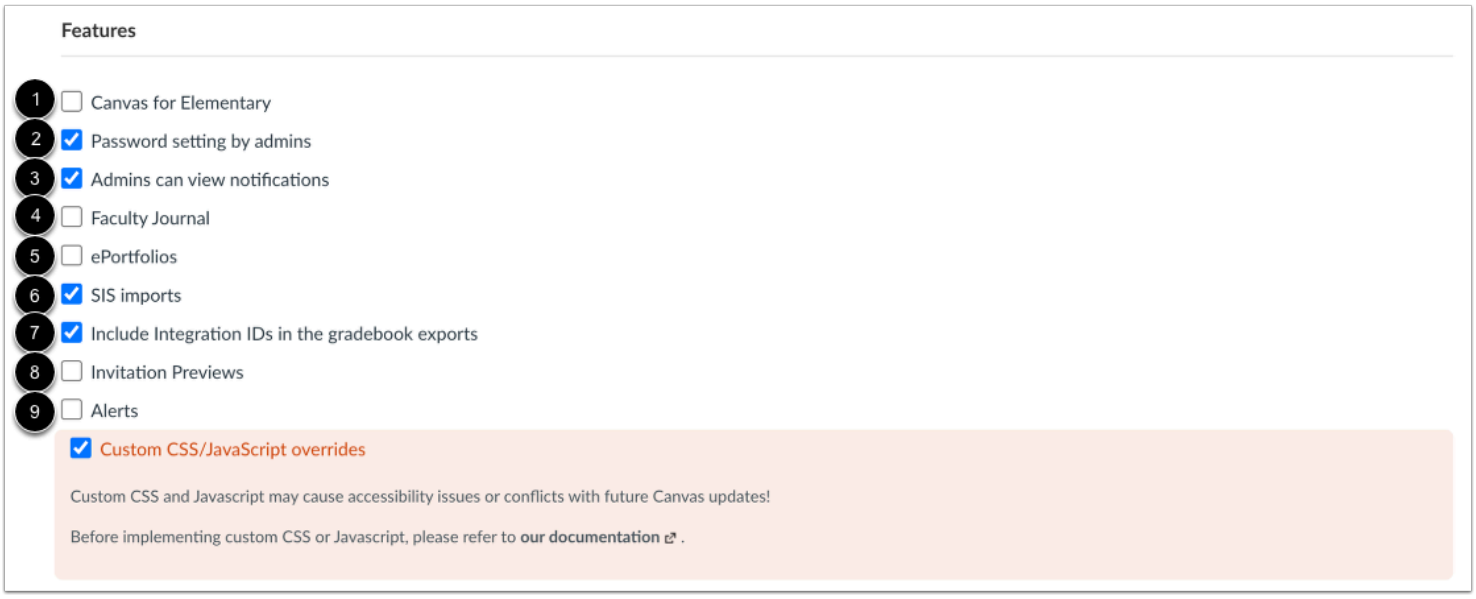
View Quiz IP Address Filters



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 child accounts to use the Canvas for Elementary interface, click the **Canvas for Elementary** checkbox [1]

To allow admins to manage user login information and change a user's password, click the **Password setting by admins** checkbox [2]. This option is best for institutions that do not use a student information system to manage student data.

To allow parent account admins to view notifications that have been sent to a specific user, click the **Admins can view notifications** checkbox [3].

The Faculty Journal allows intructors to make private notes about student progress that are available beyond a single course. To manage the Faculty Journal for the account, click the **Faculty Journal** checkbox [4].

To allow ePortfolios, click the **ePortfolios** checkbox [5].

To allow SIS imports, click the **SIS imports** checkbox [6].

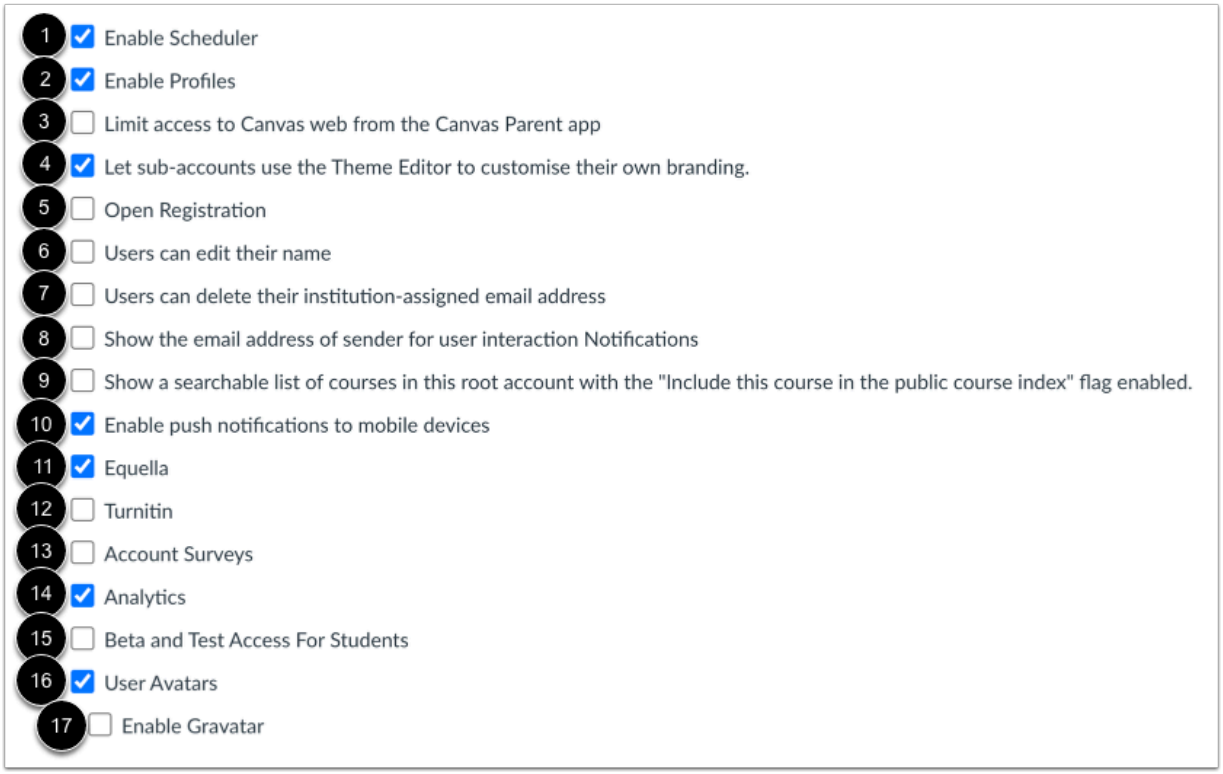
To include integration IDs in Gradebook exports, click the **Include integration IDs in the gradebook exports** checkbox [7].

To allow invitation previews, click the **Invitation Previews** checkbox [8].

To allow alerts, click the **Alerts** checkbox [9].

To allow custom CSS or JavaScript to override default Canvas interface settings, click the **Custom CSS/ JavaScript overrides** checkbox [10].

View Additional Features



To enable the scheduler, click the **Enable Scheduler** checkbox [1].

To enable user profiles which takes the place of the User Details page, click the **Enable Profiles** checkbox [2].

To prevent users from navigating to Canvas in a web browser within the Canvas Parent app, click the **Limit access to Canvas web from the Canvas Parent app** checkbox [3].

To let child accounts use the Theme Editor, click the **Let sub-accounts use the Theme Editor to customize their own branding** checkbox [4].

To allow users to be added to a course via email address without already having a Canvas user account, click the Open Registration checkbox [5].

To allow users to edit their name as part of their user account settings, click the **Users can edit their name** checkbox [6].

To allow users to delete the institution-added email address in their user accounts and use a personal email address**,** click the **Users can delete their institution-assigned email address** checkbox [7]. If this feature is selected, also consider enabling the non-institutional email notification.

To display the sender email address for user interaction notifications, click the **Show the email address of sender for user interaction Notifications** checkbox [8].

To show a searchable list of courses in the root account when the public course index setting is enabled, click the **Show a searchable list of courses in this root account with the "Include this course in the public course index" flag enabled** checkbox [9].

To allow push notifications for mobile device users, click the **Enable push notifications to mobile devices** checkbox[10].

To allow users to integrate course content using Equella, click the **Equella** checkbox [11].

To enable the Turnitin API, click the **Turnitin** checkbox [12].

To allow users in your account to receive surveys about Canvas, click the **Account Surveys** checkbox [13].

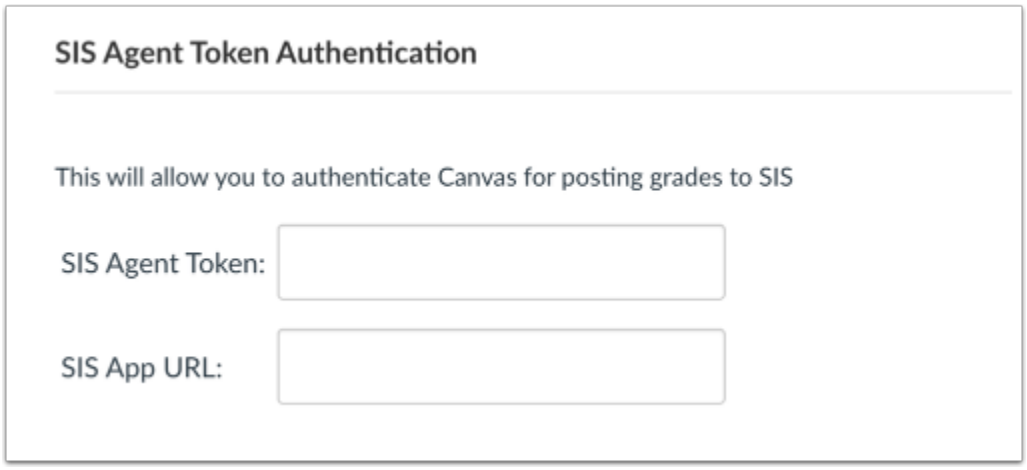
To enable analytics for the account, click the **Analytics** checkbox [14].

To allow students to access beta and test instances, click the **Beta and Test Access for Students** checkbox [15]

To allow users to upload a profile picture in their user accounts, click the **User Avatars** checkbox [16]. When this feature is enabled, you can manage profile pictures for all users.

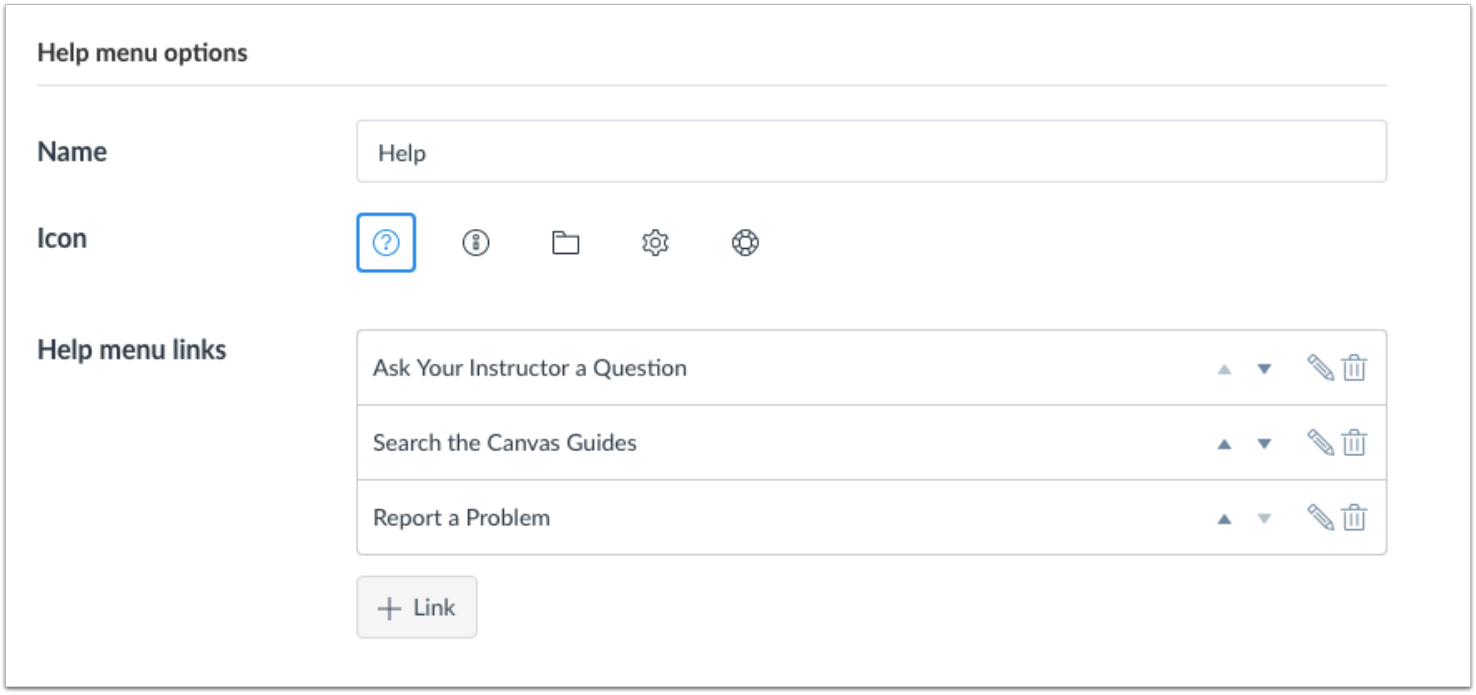
When the User Avatars checkbox is selected, the **Enable Gravatar** checkbox is also selected by default [17]. A Gravatar is a globally recognized avatar associated for a user in any website that supports Gravatars. When Gravatars are enabled in an account, users can import their Gravatar when selecting a profile picture in their user settings page. Gravatars are associated with the users Gravatar email address. When Gravatars are disabled, the From Gravatar tab is not included as an option in the Select Profile Picture window.

View SIS Grade Export Settings



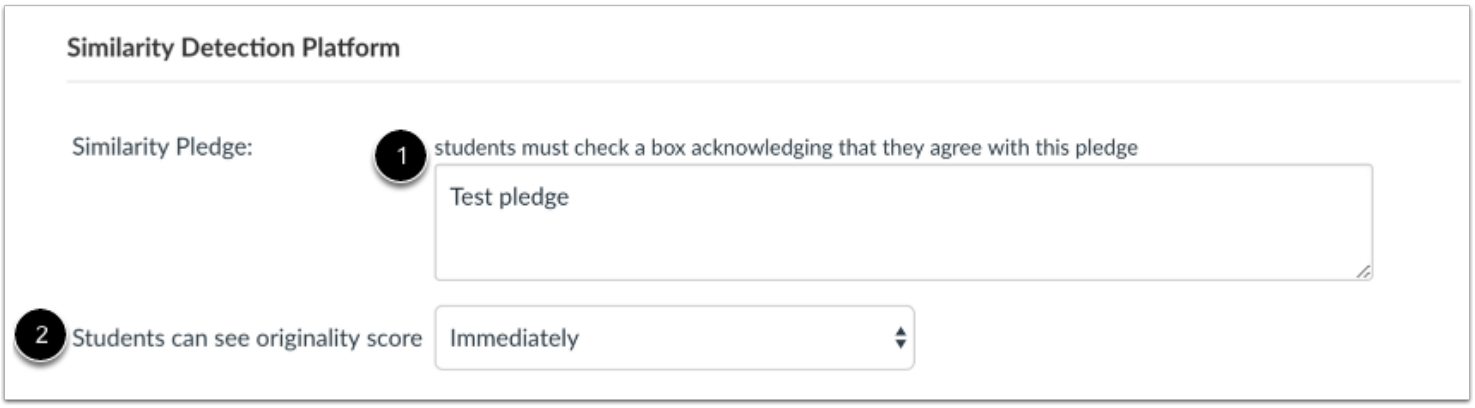
If you've integrated your account with a student information system (SIS), depending on your institution's configuration, you can either configure SIS submissions for your entire consortium account or manage SIS integration settings.

View Help Menu Options



As a consortium account admin, you can customize the Help menu that appears in Canvas for all users. You can also add custom help links for your institution and have them display to all or specific user roles.

View Similarity Detection Platform

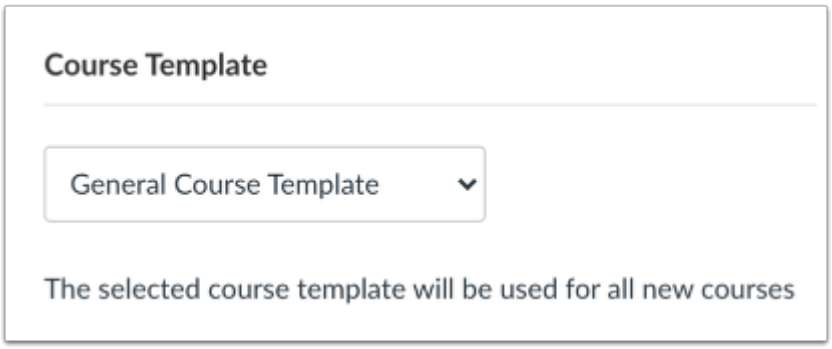


The Similarity Detection Platform section displays for all accounts and is used for plagiarism LTI tool integrations.

If your account has installed at least one plagiarism LTI tool, any content you include in the Similarity Pledge text field will display to students [1]. Similarity pledges require students to check a box acknowledging they agree with the pledge information, which usually asks them to verify their work is their own and that any sources have been properly cited.

You can also set the originality score default for the entire account in the **Students can see originality score** drop-down menu [2]. You can set the report to generate immediately upon assignment submission, after an assignment is graded, after an assignment due date, or never. The account default is not required and can be changed at any other level. Subaccounts can set a separate default from the account, and individual assignments within a course can set their own originality preferences as well.

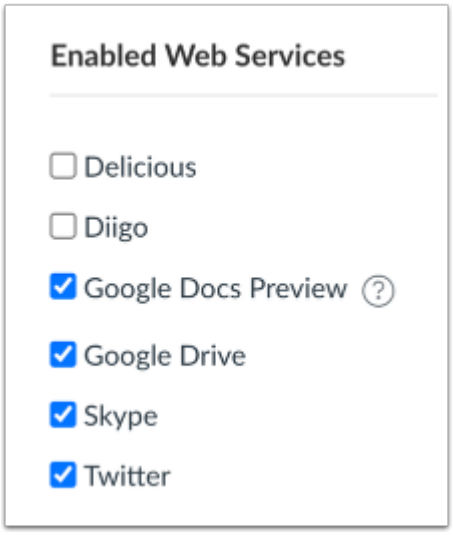
View Course Template



If a course has been designated as a course template, you can select the template to be used for all new courses in the consortium account or child account(s).

Note: Course templates are not inherited into child consortium accounts.

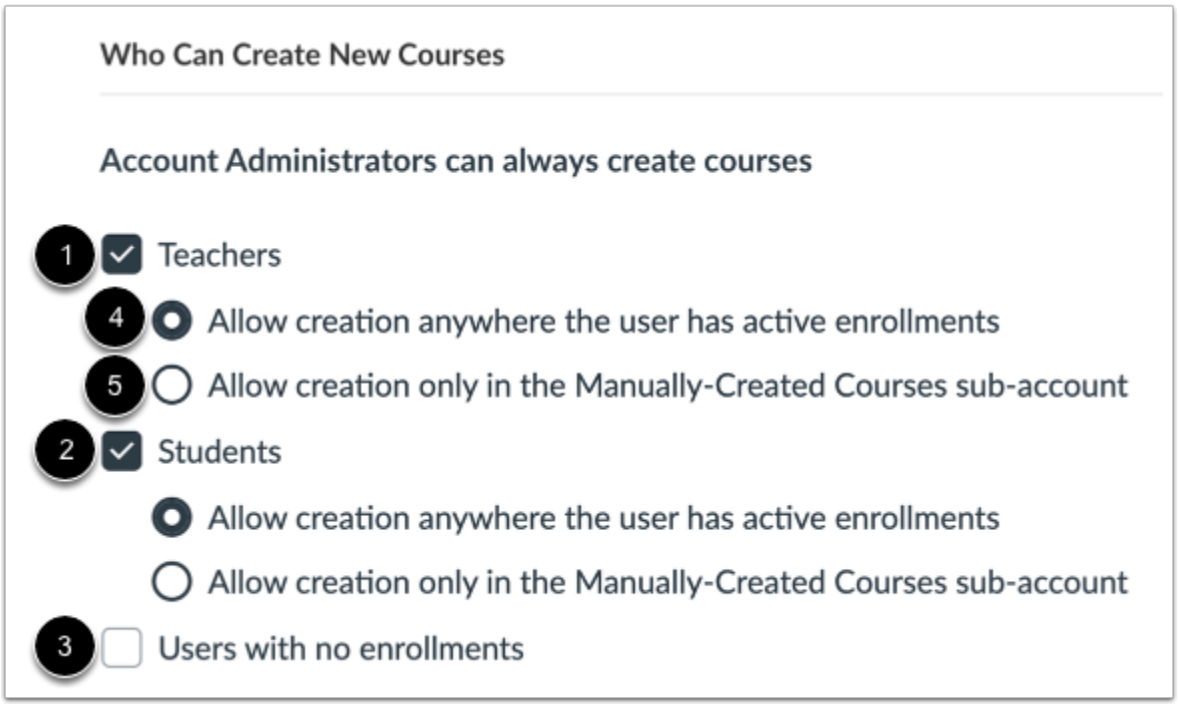
View Web Services



The Enabled Web Services section displays third-party integrations that can be enabled for a consortium account. 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 Settings.

Note: If you enable the Google Apps LTI for your entire consortium, you do not need to enable the Google Drive web service for your students.

View Who Can Create New Courses



You can choose who can create new courses within your account in addition to consortium account administrators. This setting allows the selected user(s) to create new course shells by clicking the Create a New Course button in the Dashboard.

You can allow teachers (instructors) [1], students [2], and/or users with no enrollments [3] to create courses in your account.

You can also manage where new courses created by instructors and students can be placed. To allow courses to be created in any account where an instructor or student has an active enrollment, click the **Allow creation anywhere the user has active enrollments** checkbox [4]. To allow courses to only be created in the Manually-Created Courses sub-account, click the **Allow creation only in the Manually-Created Courses sub-account** checkbox [5].

Note: Account administrators can always create courses.

Update Settings



Click the **Update Settings** button.

Canvas Data Services

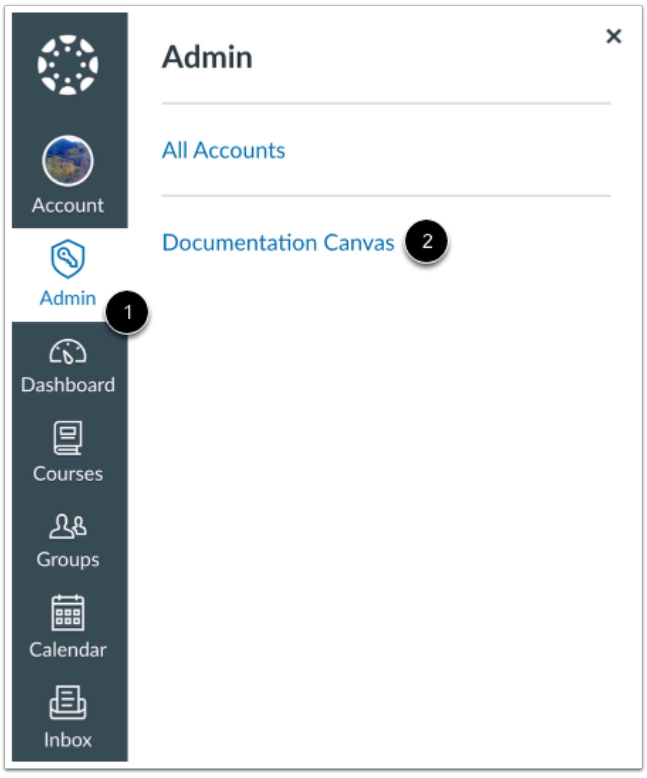
How do I install Canvas Data Services using Live events in my account?

As an admin, you can install Canvas Data Services in your account. Enabling Canvas Data Services creates a link in your Account Navigation, where you can view and manage Canvas Data streams. Canvas Data Services is separate feature from the Canvas Data Portal.

Notes:

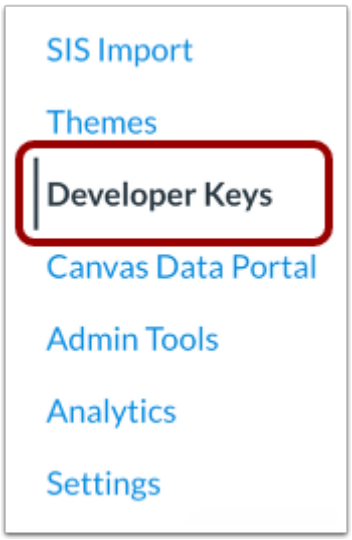
- Installing an external tool is an account permission. If you cannot view the Developer Keys link in Account Navigation, this permission has is not enabled for your user account.
- Canvas Data streams may include personal information for Canvas users. You should only stream data to trusted services and endpoints.

Open Account



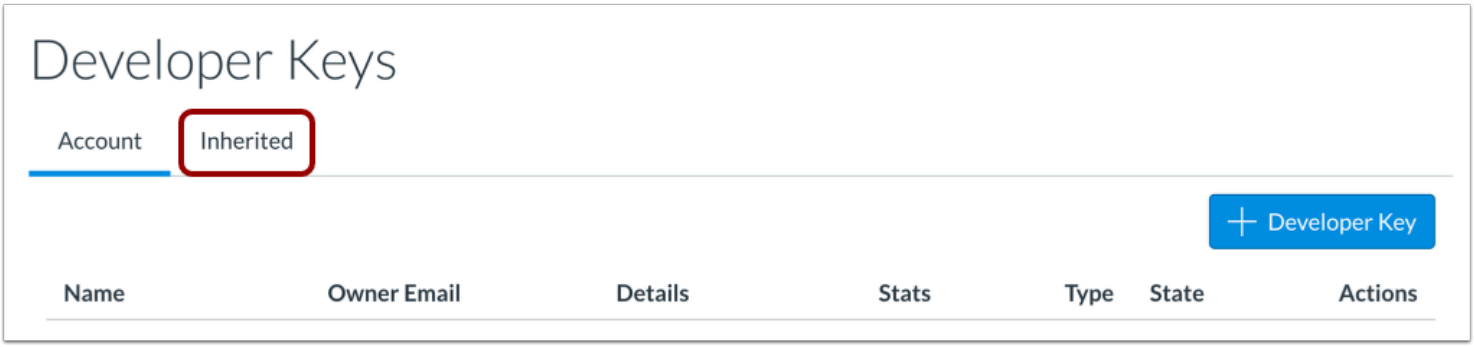
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Developer Keys



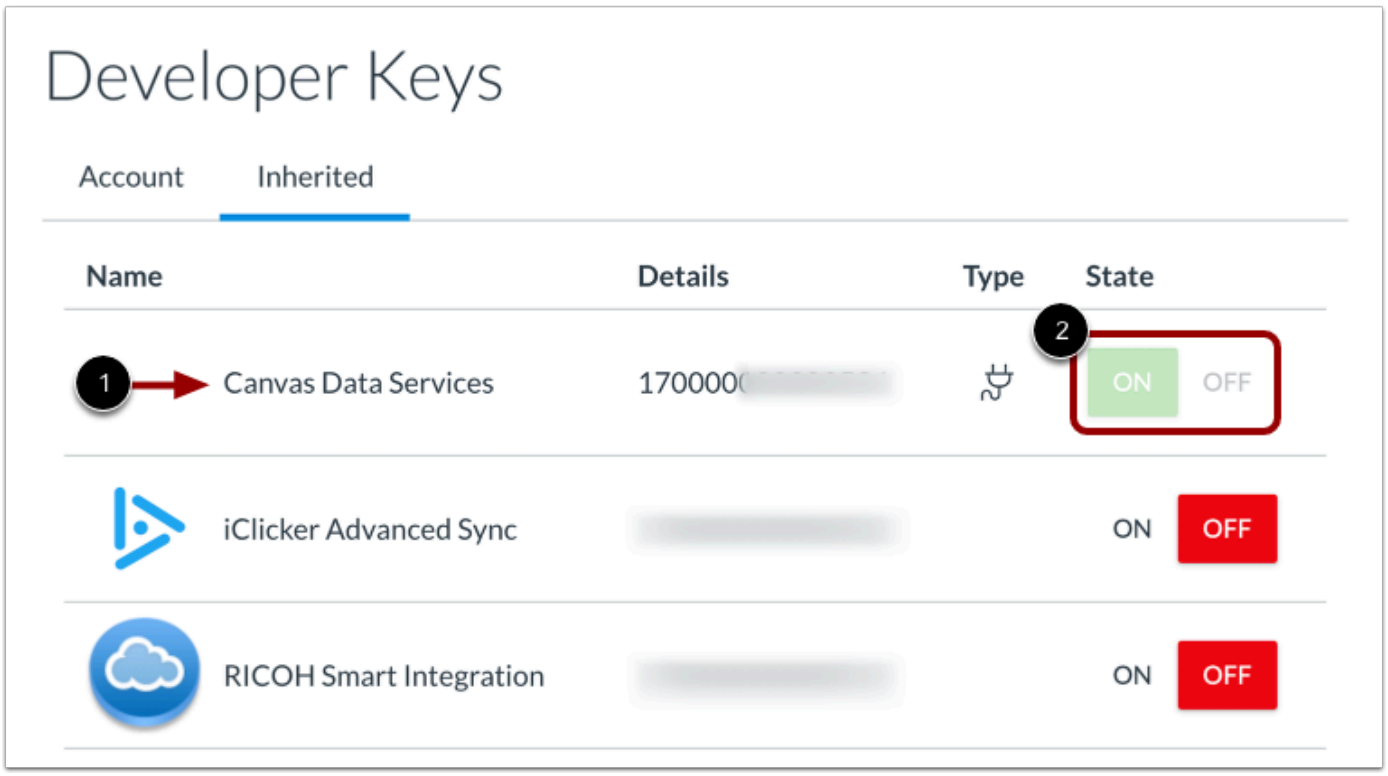
In Account Navigation, click the **Developer Keys** link.

Open Inherited Tab



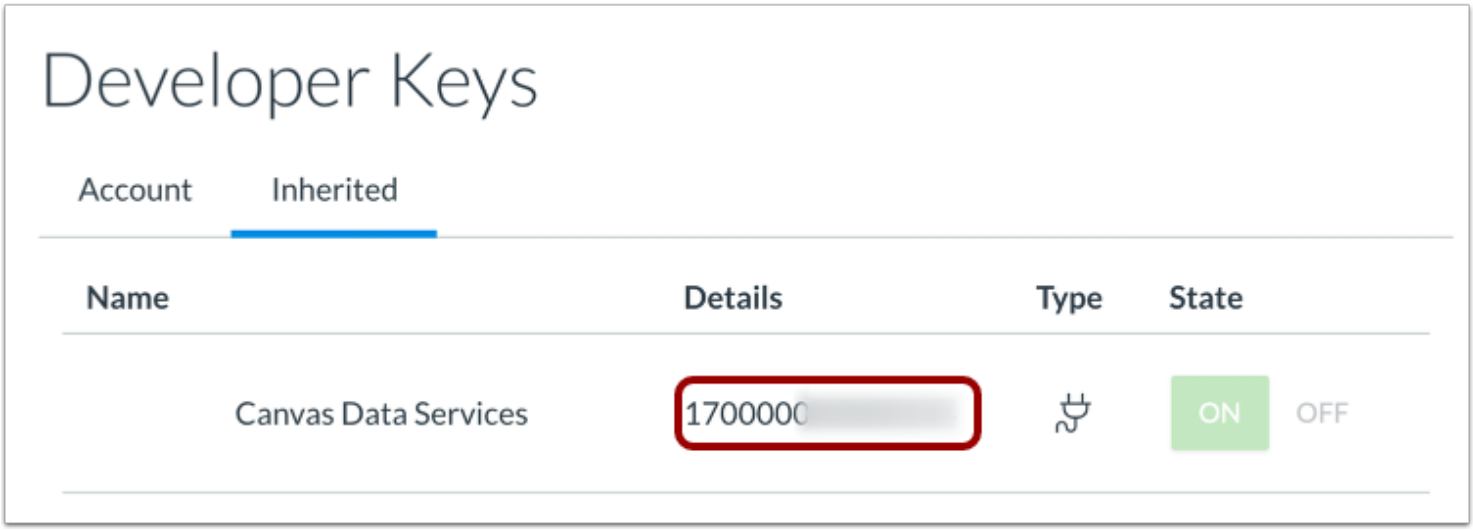
In the Developer Keys page, click the **Inherited** tab.

View Canvas Data Services Key



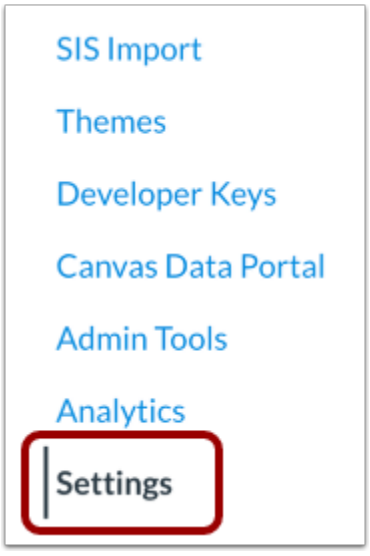
Find the **Canvas Data Services** key [1]. If necessary, set the key to On by clicking the **State** button [2].

Copy Client ID



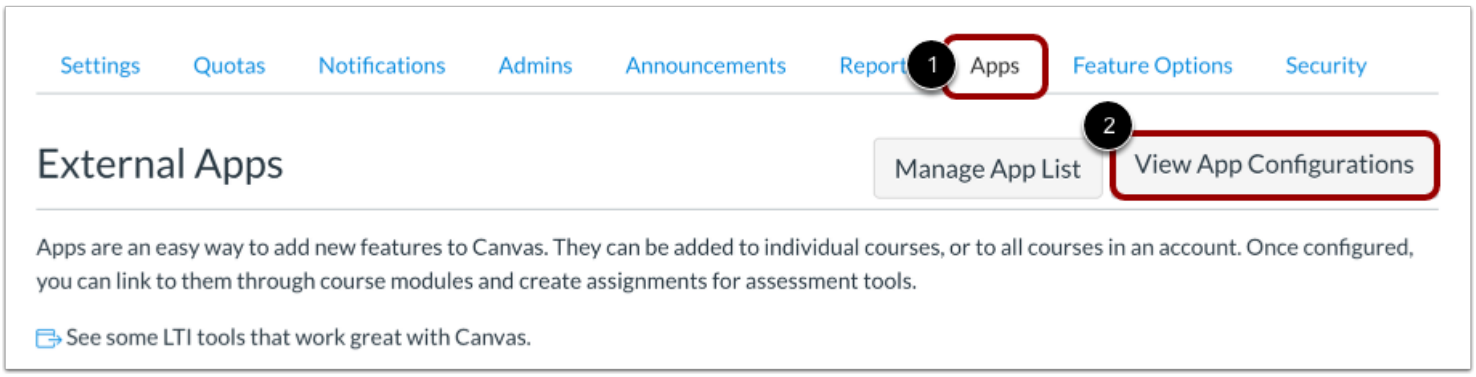
Copy the client ID found in the Details column.

Open Account Settings



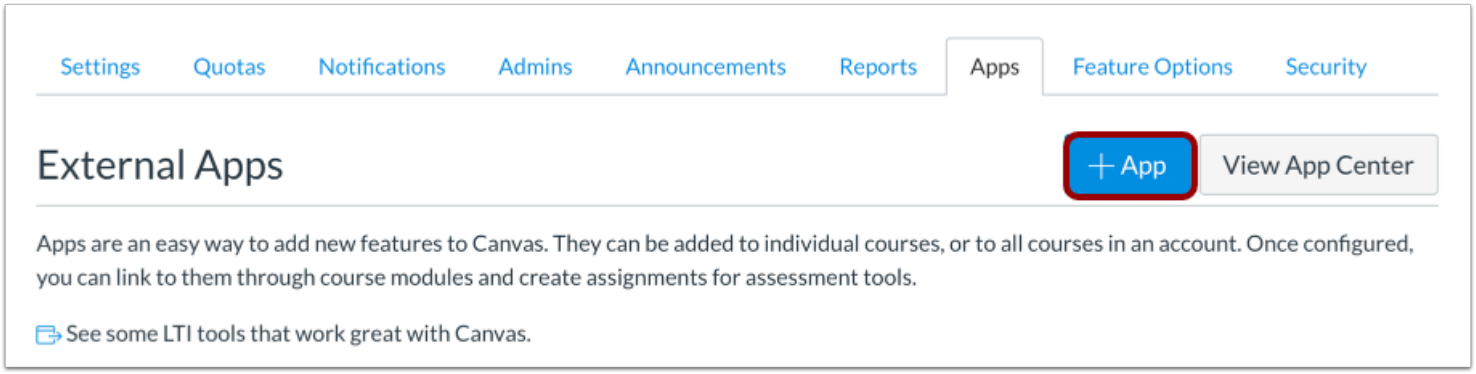
In Account Navigation, click the **Settings** link.

Open App Configurations



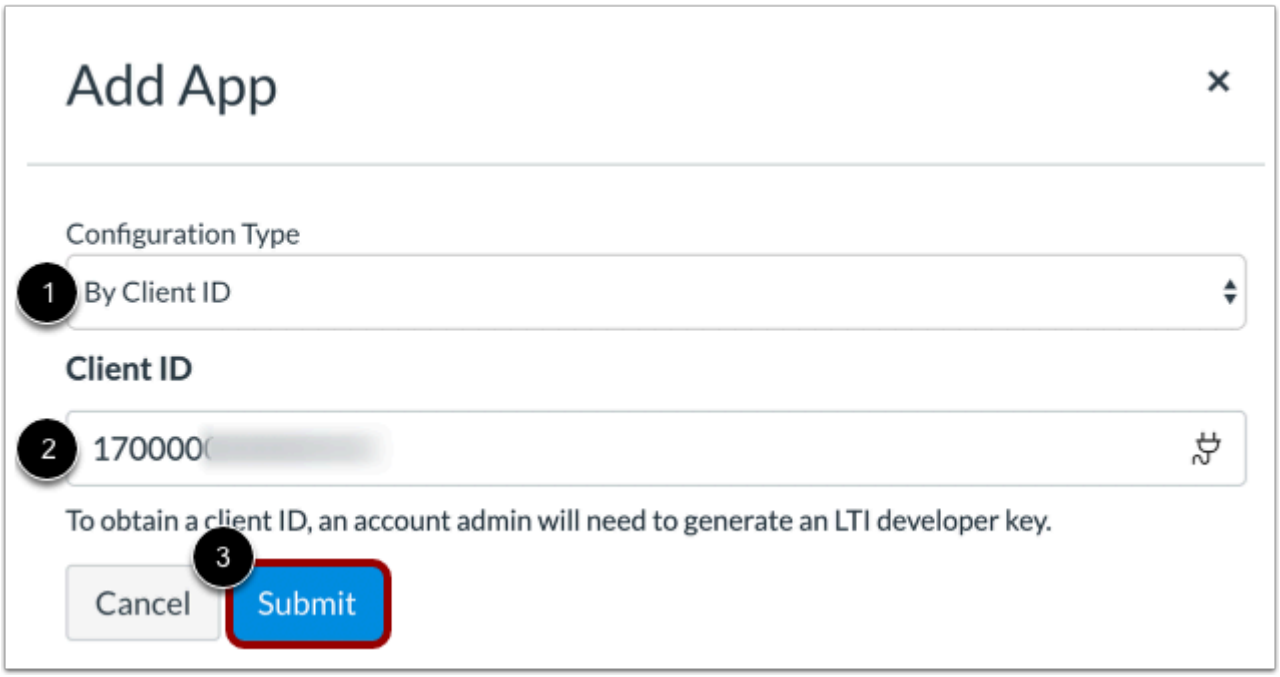
Click the **Apps** tab [1]. Then click the **View App Configurations** button [2].

Add App



Click the **Add App** button.

Enter App Details

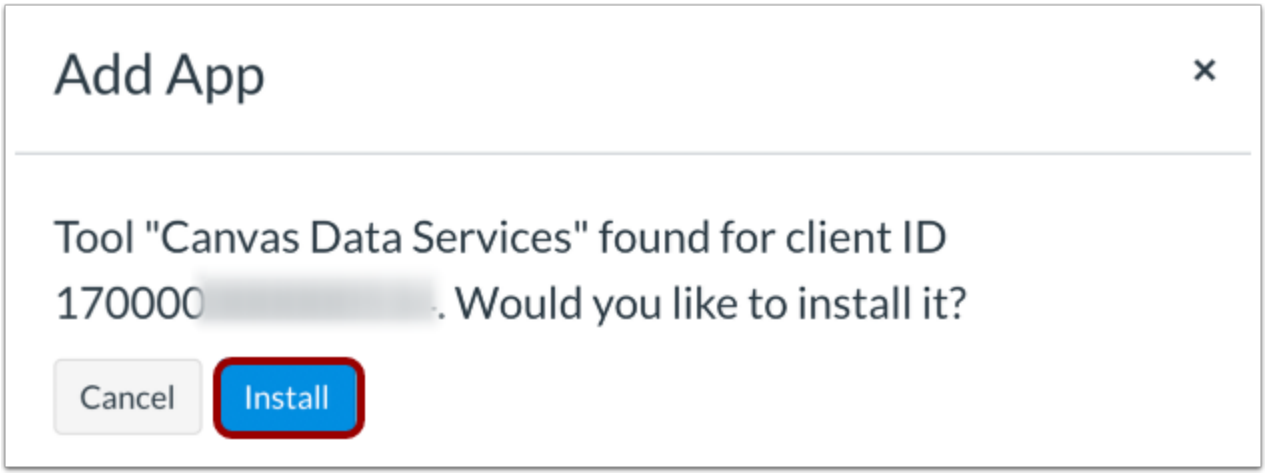


In the Configuration Type menu, select the **By Client ID** option [1].

Then paste the Canvas Data Services client ID in the **Client ID** field [2].

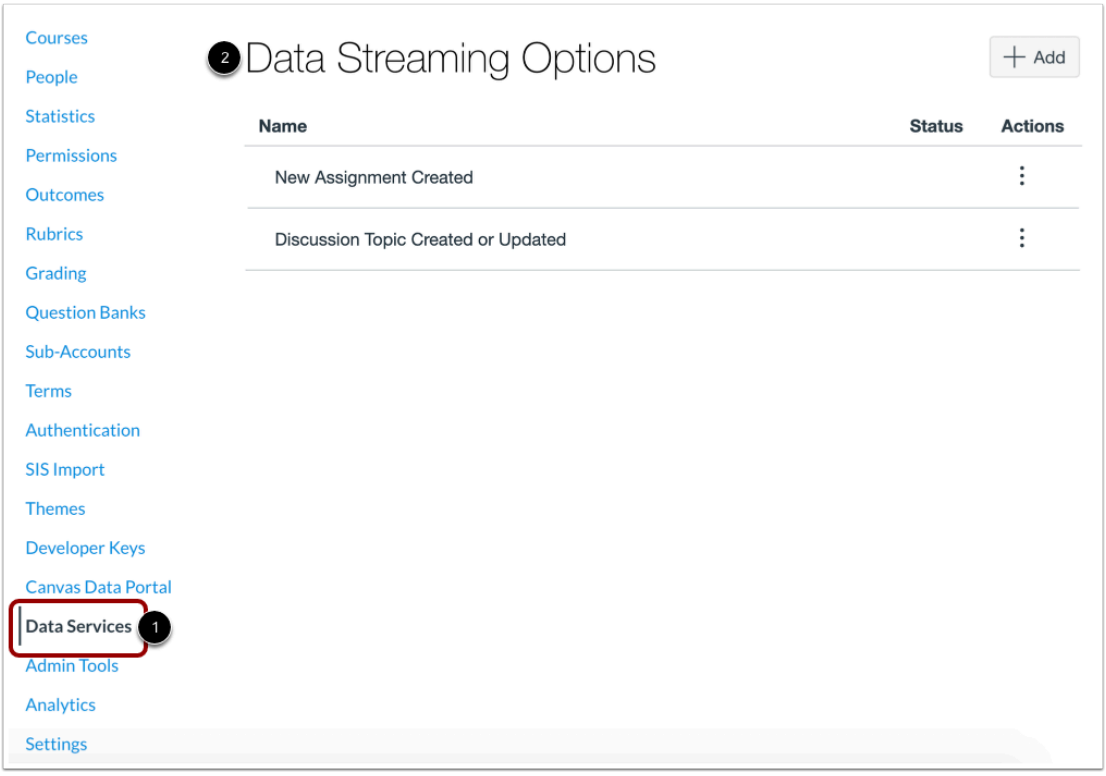
Click the **Submit** button [3].

Verify App Installation



To verify that you want to install Canvas Data Services, click the **Install** button.

View Canvas Data Services



Once Data Services is installed, you can view the **Data Services** link in your Account Navigation [1].

Clicking the Data Services link will open the **Data Streaming Options** page [2]. From this page, you can create and manage data streams.

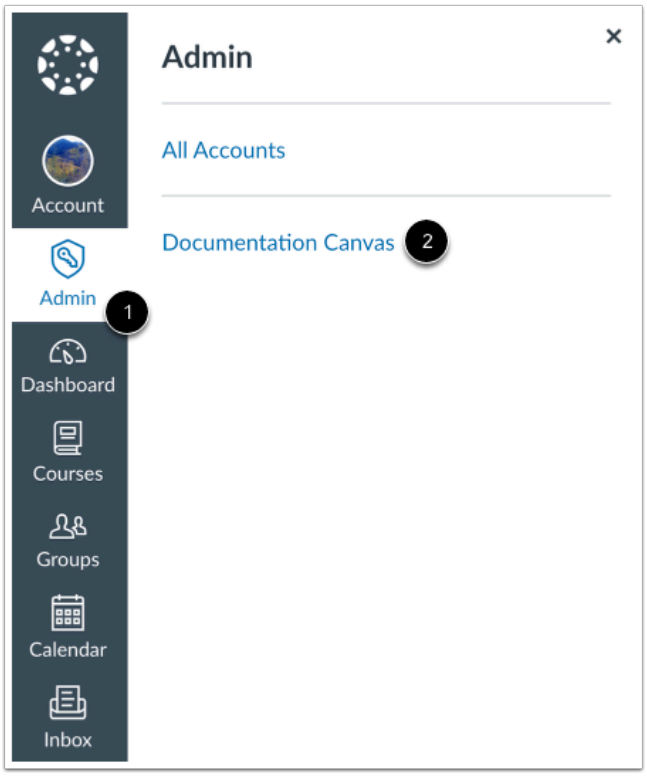
How do I use Live Events with the Data Services Portal?

If you have installed Canvas Data Services in your account, you can add and manage data streams in your account.

Notes:

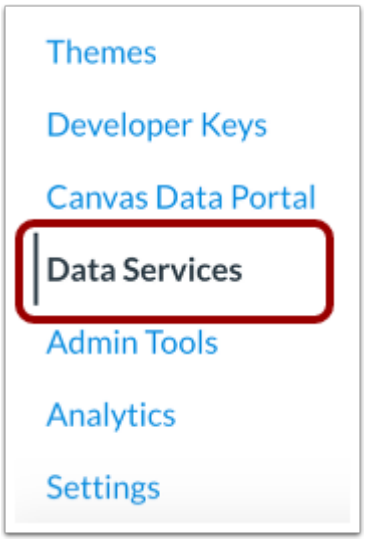
- Viewing Data Services is an account permission. If you cannot view the Data Services link in Account Navigation, this permission has not been enabled for your user account.
- Accounts must have a supported data stream service URL to receive data streams.
- Live events data is processed in the same region as the Canvas instance they are emitted from. Please ensure you can receive events from any IP address. If Canvas encounters errors in user subscriptions, live event subscriptions may be disabled.

Open Account



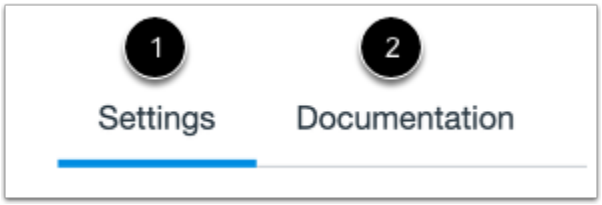
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Data Services



In Account Navigation, click the **Data Services** link.

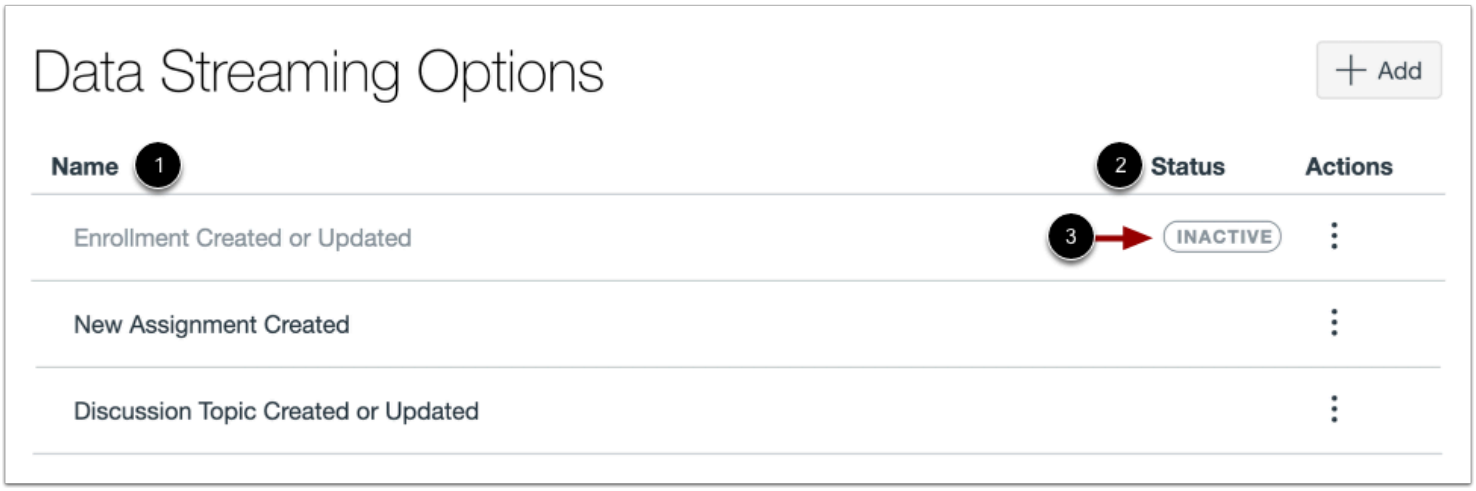
View Data Services



By default, Data Services opens to the **Settings** page [1]. In Data Services Settings, you can view and manage a list of all your account data streaming options.

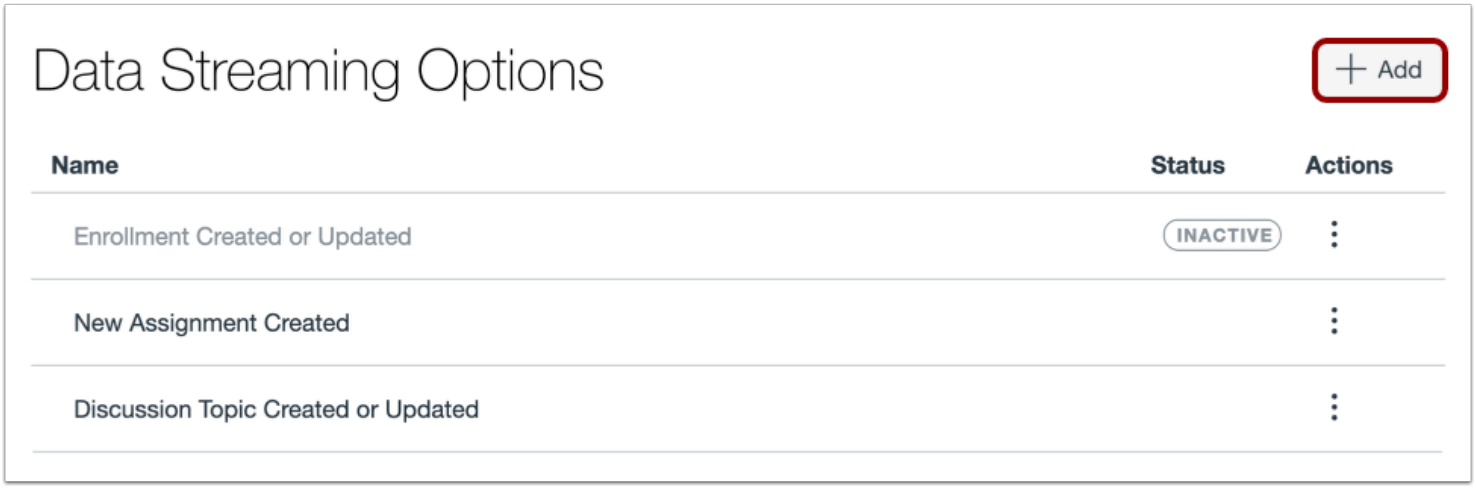
To view data services documentation, click the **Documentation** tab [2].

View Data Streaming Options



View your current data streams. The Data Streaming Options table displays the name [1] and status [2] of your streams. Inactive streams display the **Inactive** status label [3]. Active streams do not display a label.

Add Data Stream



To add a new data stream, click the **Add** button.

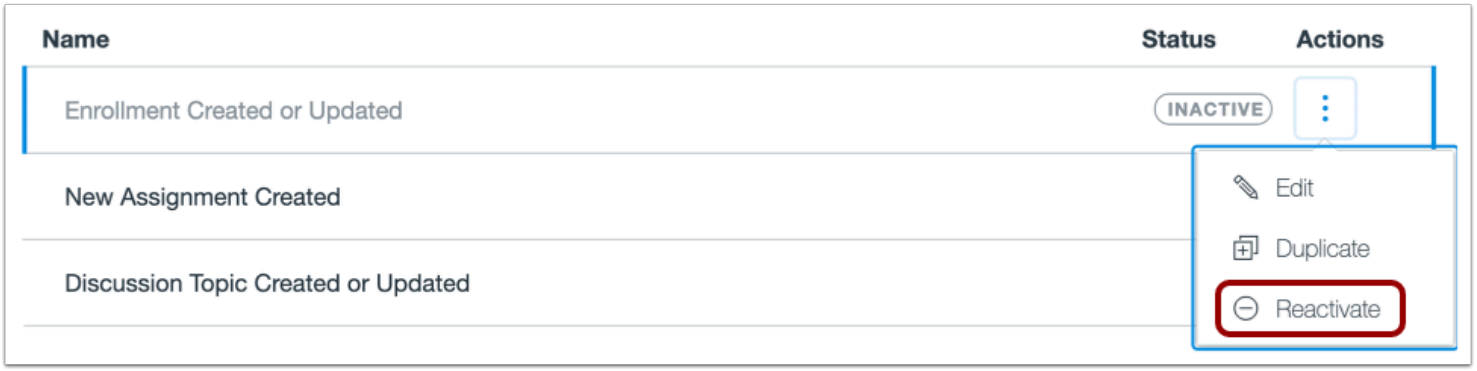
Manage Data Stream Options



To manage options for a data stream, click the stream's **Options** icon [1]. To edit the stream, click the **Edit** link [2]. To duplicate the stream, click the **Duplicate** link [3]. To deactivate the stream, click the **Deactivate** link [4].

Note: Inactive subscriptions are only displayed for 90 days.

Reactivate Data Stream



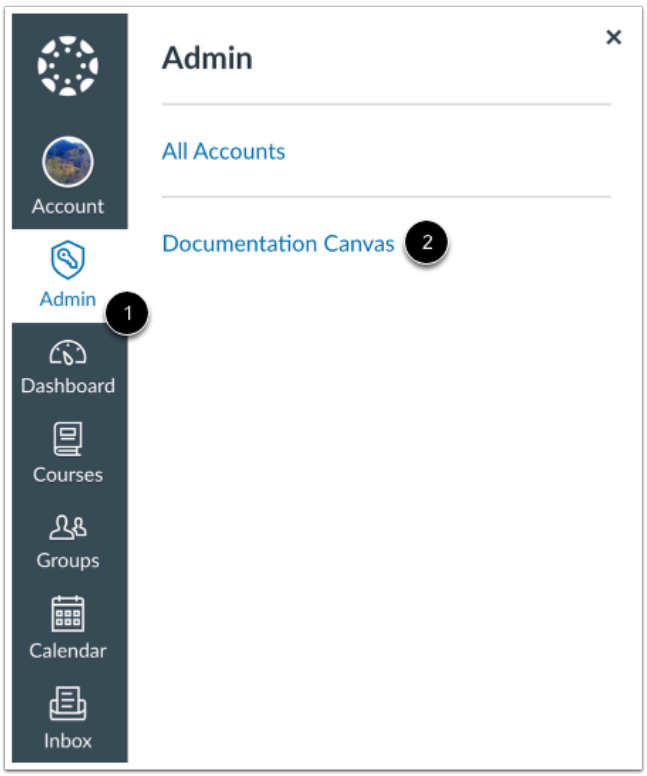
To reactivate a deactivated stream, click the **Reactivate** link.

How do I subscribe to Live Events using Canvas Data Services?

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

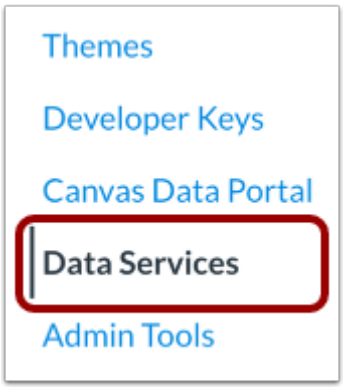
Note: To receive Live Events data, you will need to subscribe to Amazon Web Services in order to maintain a queue.

Open Account



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

Open Data Services



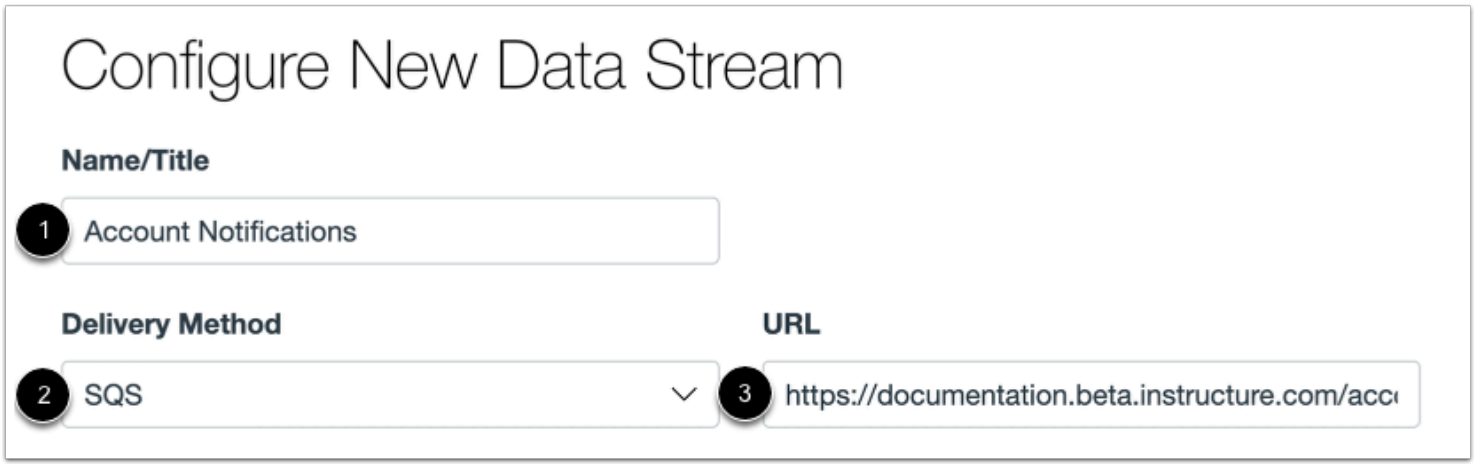
In Account Navigation, click the **Data Services** link.

Add Data Stream



To create a new data stream for your account, click the **Add Stream** button.

Configure Data Stream



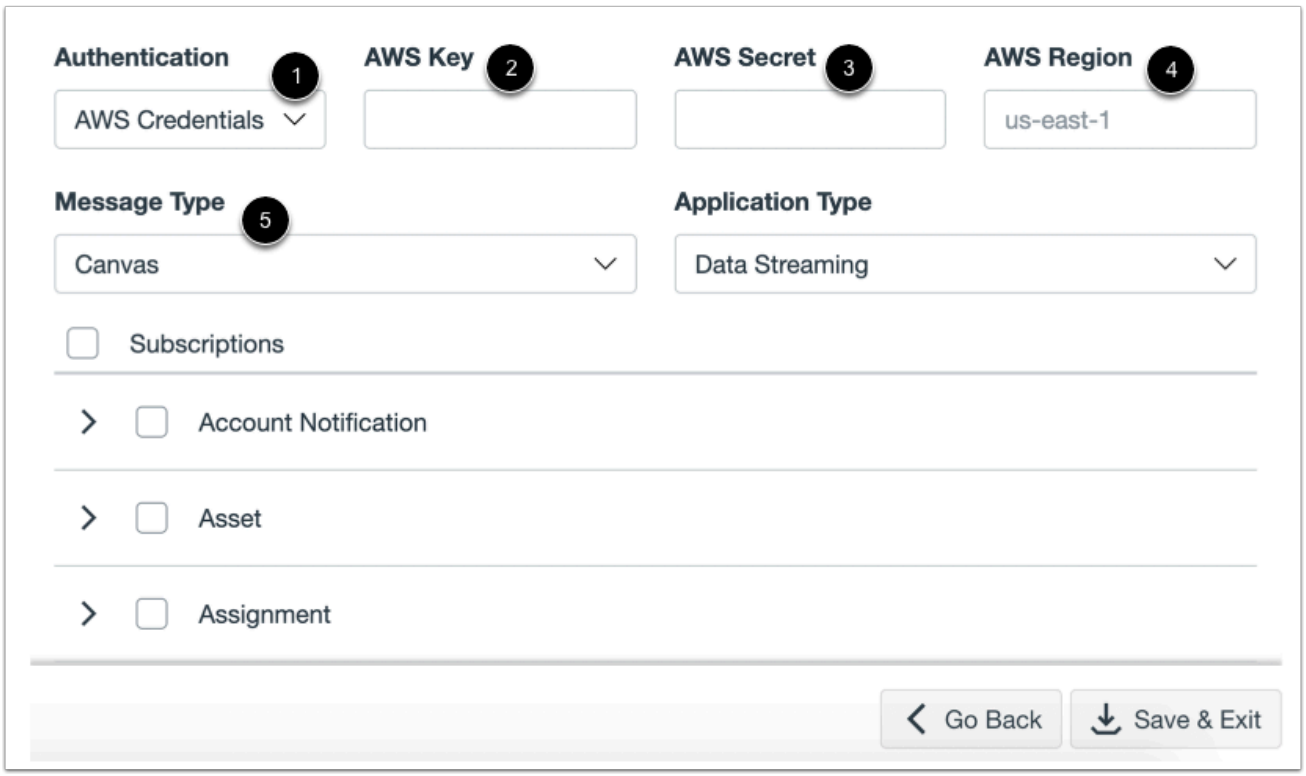
Enter a title for your stream in the **Name/Title** field [1].

Select an SQS or HTTPS delivery method in the **Delivery Method** drop-down menu [2]. Then enter your AWS SQS or an HTTPS endpoint URL in the **URL** field [3].

Notes:

- Only one delivery method is allowed per subscription.
- Canvas uses JWT to sign an event. If service is unavailable and Canvas cannot reach it, the events occurring during the service outage may not be delivered.

Configure Amazon SQS Data Stream



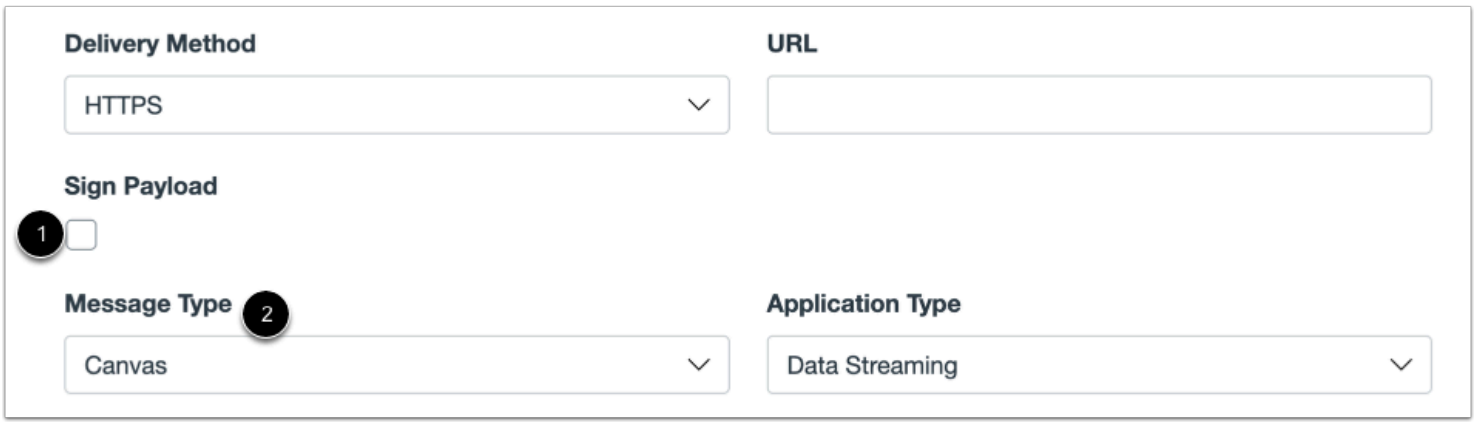
If you want to require authentication for an Amazon SQS URL, select the AWS Credentials in the **Authentication** field [1]. If authentication is not required, this field can be set to the None option.

If AWS credentials are required, enter the AWS key [2], AWS secret [3], and AWS region [4].

Select the event format in the **Message Type** field [5]. Message type can be set to Canvas or Caliper 1.1.

Note: The Application Type field can only be set to the Data Streaming option.

Configure HTTPS Data Stream

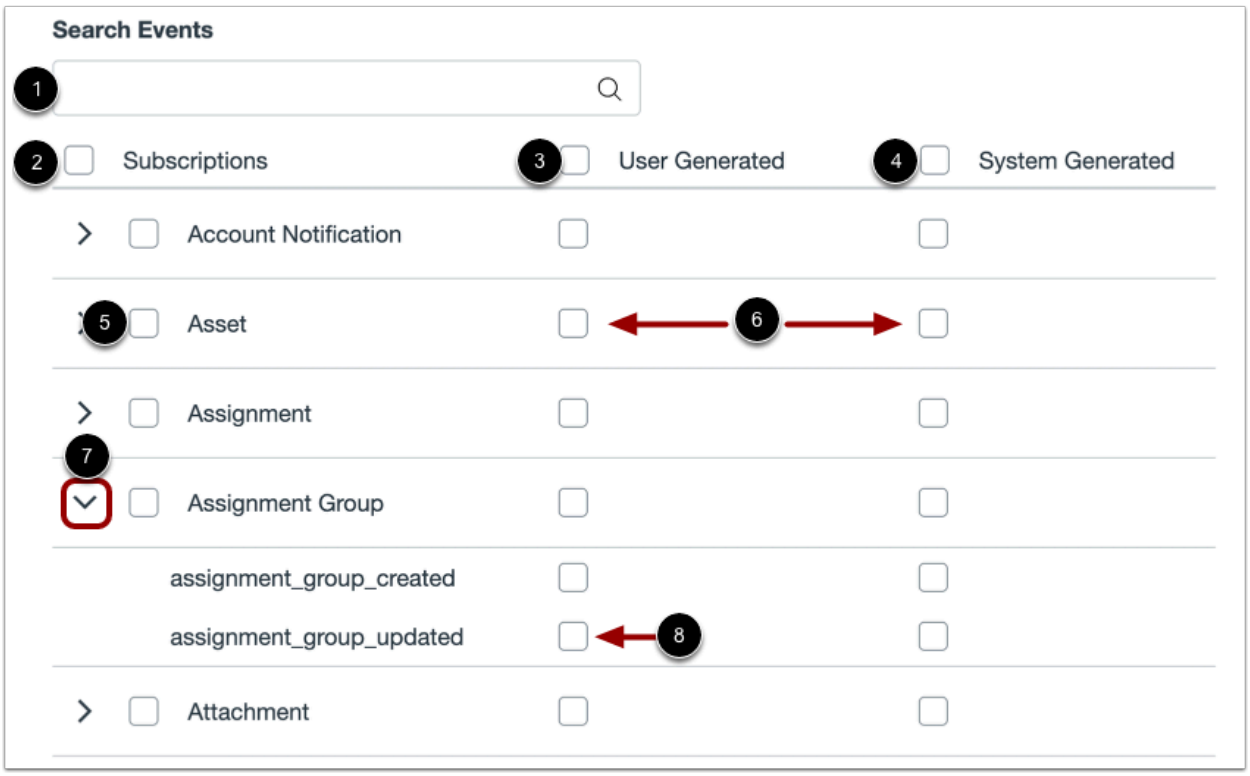


The HTTPS delivery method includes an option to display source endpoint payload data with your data stream. To view payload data, select the **Sign Payload** checkbox [1].

Select the event format in the **Message Type** field [2]. Message type can be set to Canvas or Caliper 1.1.

Note: The Application Type field can only be set to the Data Streaming option.

Select Subcriptions



Select the subscriptions you want to include in your data stream.

To search for specific events, type the event name in the **Search Events** field [1].

To include all events in your stream, click the **Subscriptions** checkbox [2]. Selecting this option includes all event types as well as user and system generated actions.

To subscribe to events triggered by an action directly performed by and end user, click the **User Generated** checkbox [3]. User generated events include information about web requests, browser and user data in event metadata, and details about objects affected by the change.

To subscribe to events triggered by asynchronous jobs, click the **System Generated** checkbox [4]. System generated events include data about processes that triggered an event as well as details about objects affected by the change.

You can also subscribe to event groups. To subscribe to all items in a group, click the checkbox for the group [5]. You can also select to include only User or System Generated data [6].

To subscribe to individual events, click the **Arrow** icon for the subscription group [7] and click the checkbox for the subscription you want to add [8].

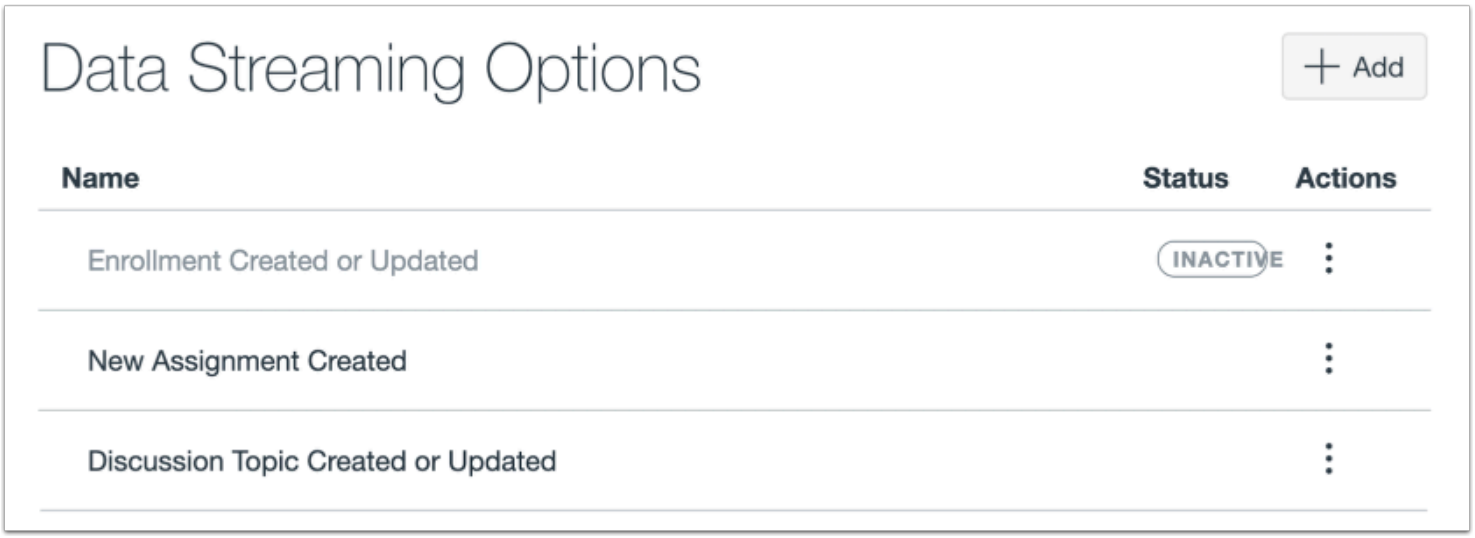
Note: The image in this step shows subscription options for the Canvas message type. The options for the Caliper 1.1 message types are different, but the steps to subscribe are the same.

Save Data Stream



To save your data stream, click the **Save & Exit** button.

View Data Streams



You can view and manage your data streams on the Data Streaming Options page.

How do I create an SQS queue in Amazon Web Services to receive Live Events data from Canvas?

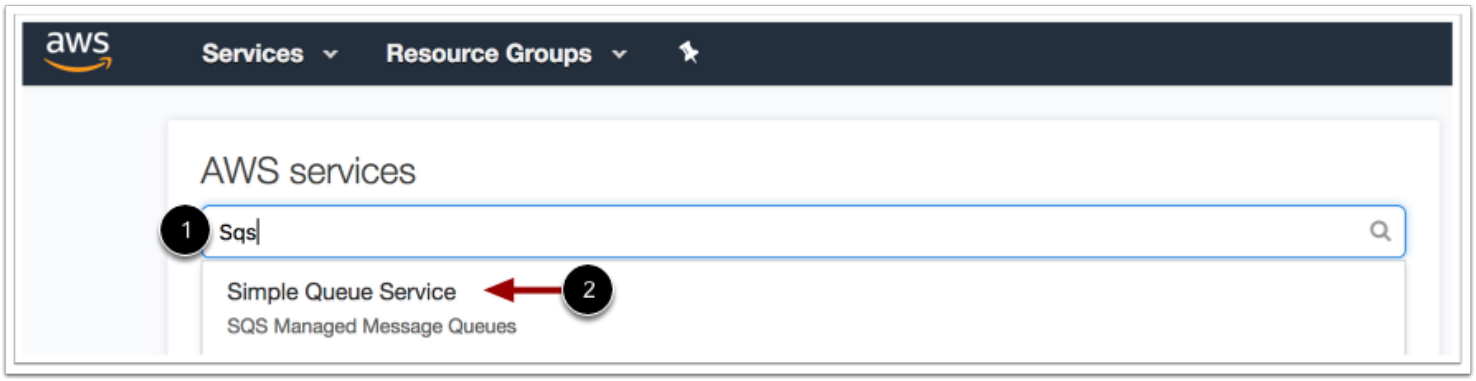
To receive data from Canvas you will need to set up and maintain a queue in Amazon Web Services. Additionally, you will need to grant the appropriate permissions for the queue to receive data.

After you set up a queue with the appropriate permissions, you can subscribe to events in Data Services and begin receiving data.

Notes:

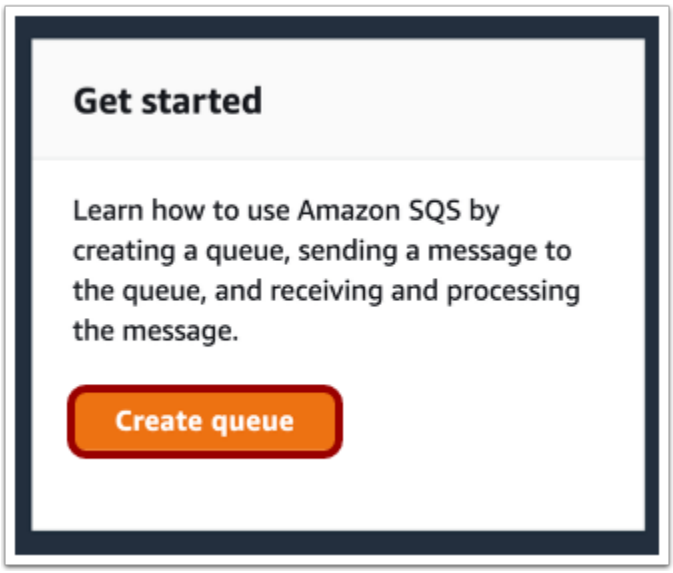
- FIFO queues are not currently supported.
- When setting up an SQS queue you can enable long polling in a standard queue. Long Polling helps eliminate the number of empty responses and false empty responses. For more information about long polling, please see the Amazon SQS Long Polling documentation.

Open Amazon SQS Console



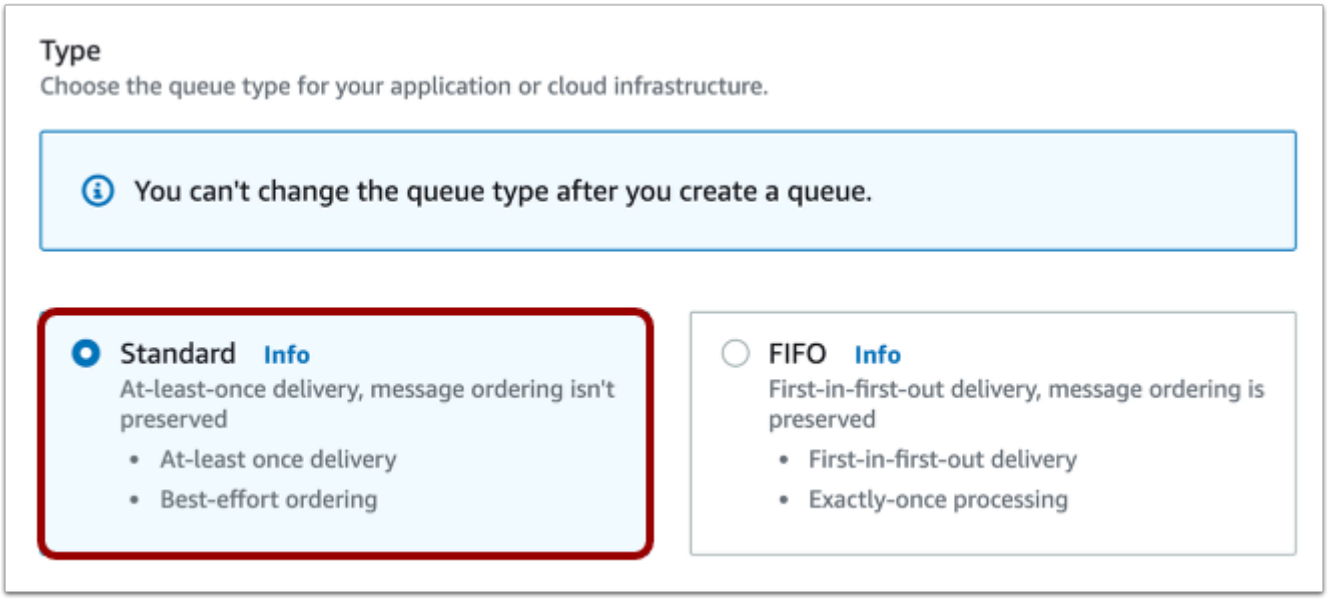
In the Amazon Web Services console, open the Simple Queue Service (SQS) console by typing the name in the **Services** field [1]. When Simple Queue Service displays in the list, click the name [2].

Create New Queue



In the Amazon SQS console, click the **Create queue** button.

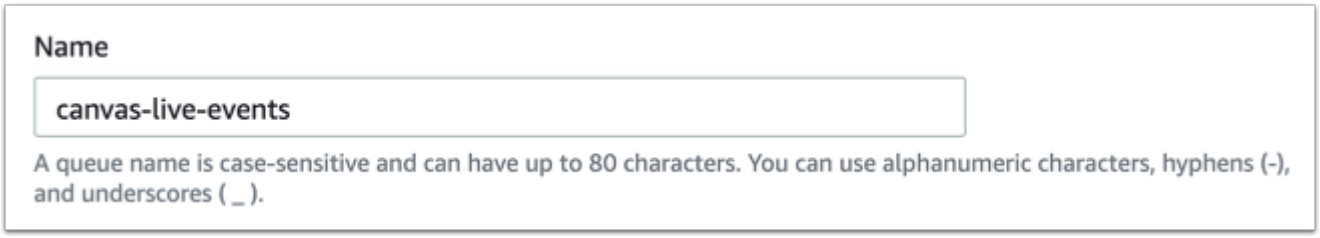
Select Standard Queue



In the Type section, select the **Standard** option.

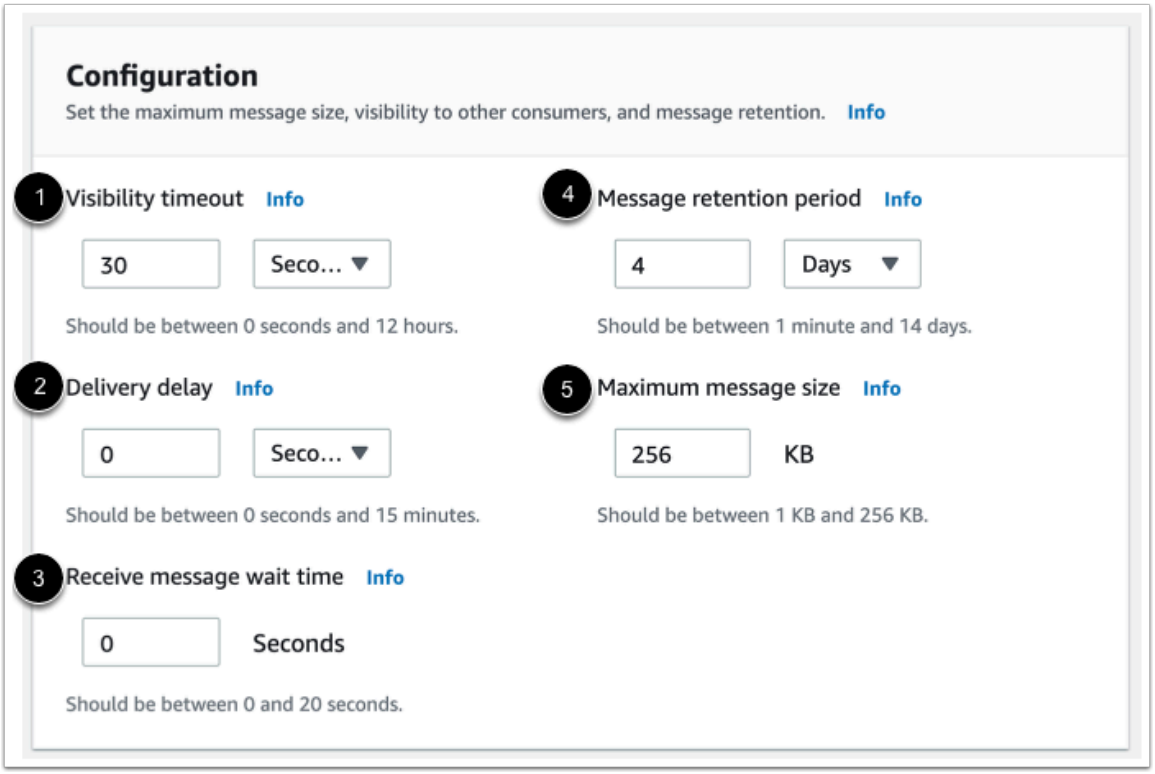
Note: FIFO Queues are not currently supported.

Enter Queue Name



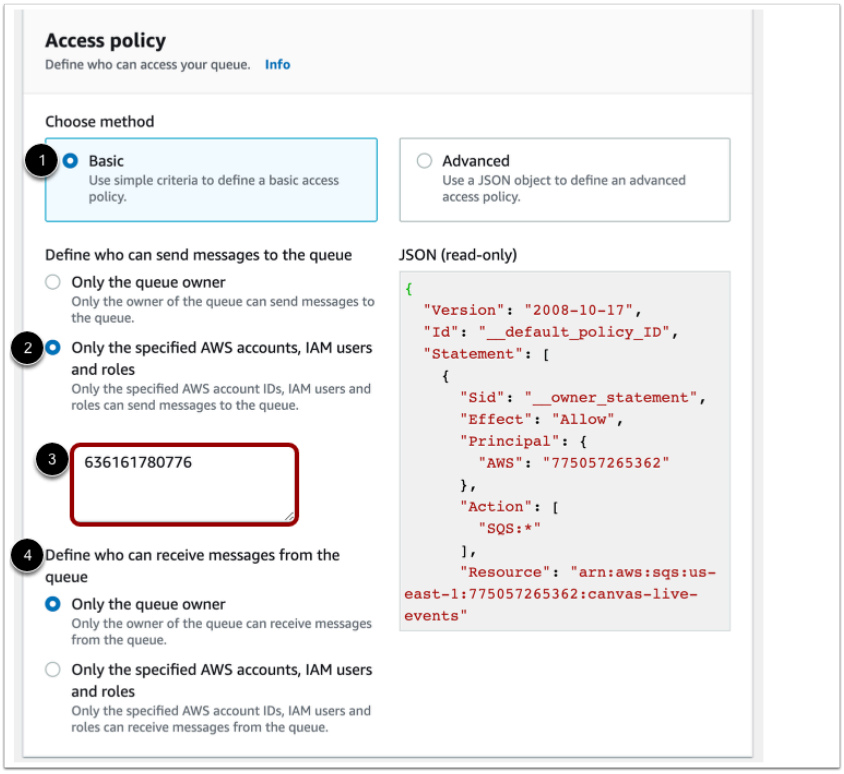
Enter a name for the queue. The name of the queue must begin with *canvas-live-events*.

Enter Configuration Details



Enter the **Configuration** details. You can enter your preferences for visibility timeout [1], delivery delay [2], receive message wait time [3], message retention period [4], and maximum message size [5].

Enter Access Policy Details



Enter the details for your access policy.

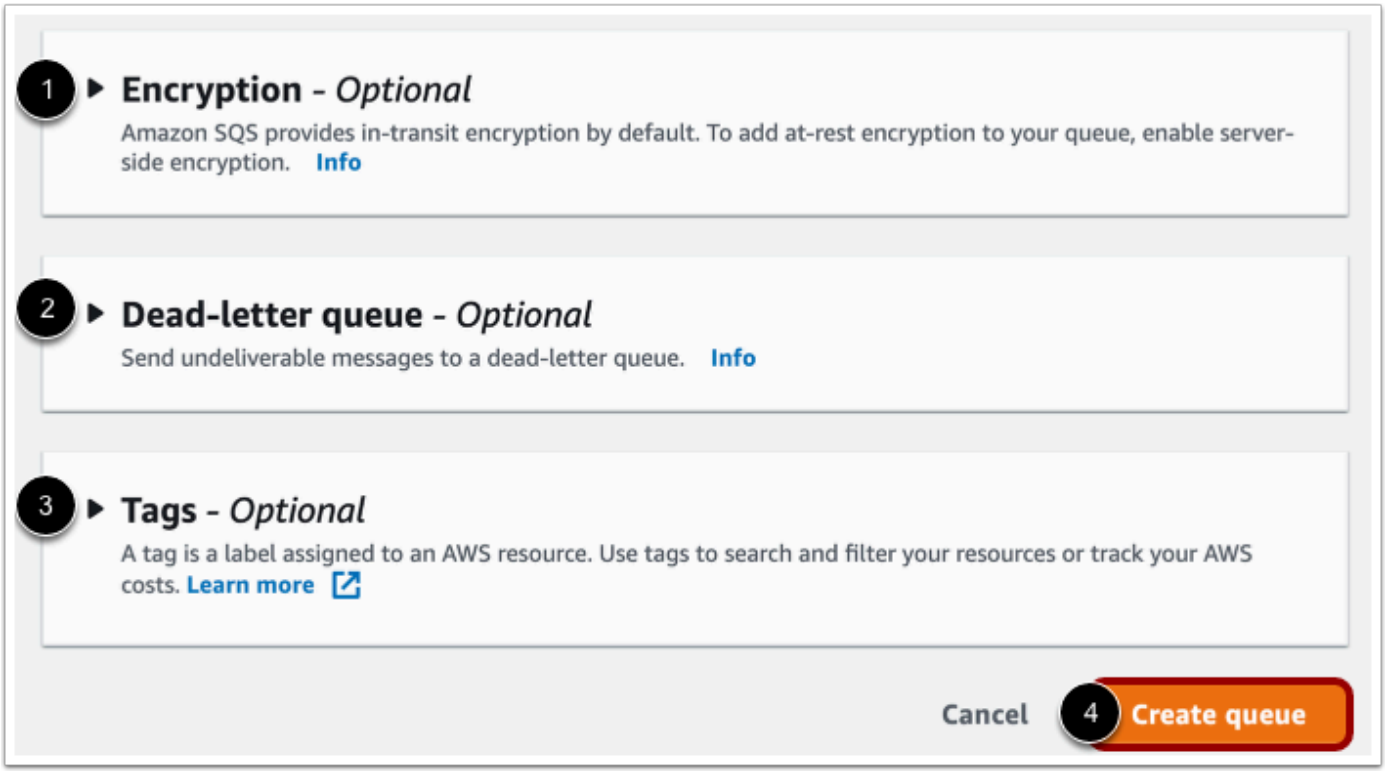
In the Choose method section, select the **Basic** option [1].

In the Define who can send messages to the queue section, select the **Only the specified AWS accounts, IAM users and roles** option [2].

In the account ID field, enter the account number **636161780776** [3]. This account number is required for the queue to receive Live Events data.

You can also select who will receive messages in the **Define who can receive messages from the queue** section [4].

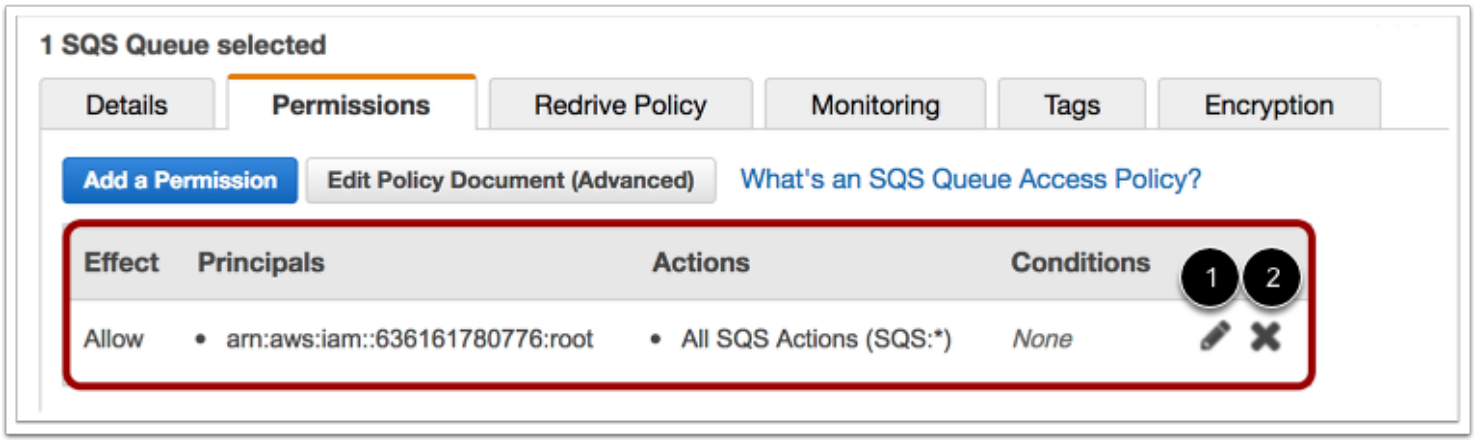
Save Queue



You can add additional details in **Encryption** settings [1], **Dead-letter queue** settings [2], and **Tags** settings [3]. All of these settings are optional.

To create your queue, click the **Create queue** button [4].

View Queue Permission



In the queue details area, the permission will display in the Permissions tab.

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

Using SSE setting with your SQS (Optional)

Canvas Live Events service supports SSE enabled on SQS, in order for SSE to be used the following setup needs to be enabled on the customer SQS :

1. Create a CMK or custom key with this policy, which can be generated by following the steps for creating a CMK, and during step 4 (Define Key Usage Permissions), clicking “Add another AWS Account” and entering the Instructure account number 636161780776.

```
{
 "Id": "key-consolepolicy-3",
 "Version": "2012-10-17",
 "Statement": [
 {
 "Sid": "Enable IAM User Permissions",
 "Effect": "Allow",
 "Principal": {
 "AWS": "arn of the customer account root"
 },
```

```
"Action": "kms:*",
"Resource": "*"
},
{
"Sid": "Allow access for Key Administrators",
"Effect": "Allow",
"Principal": {
"AWS": "arn of admin user"
},
"Action": [
"kms:Create*",
"kms:Describe*",
"kms:Enable*",
"kms:List*",
"kms:Put*",
"kms:Update*",
"kms:Revoke*",
"kms:Disable*",
"kms:Get*",
"kms:Delete*",
"kms:TagResource",
"kms:UntagResource",
"kms:ScheduleKeyDeletion",
"kms:CancelKeyDeletion"
],
"Resource": "*"
},
{
"Sid": "Allow use of the key",
"Effect": "Allow",
"Principal": {
"AWS": [
"arn of admin user",
"arn:aws:iam::636161780776:root" // instructure account
]
},
"Action": [
```

```
"kms:Encrypt",
"kms:Decrypt",
"kms:ReEncrypt*",
"kms:GenerateDataKey*",
"kms:DescribeKey"
],
"Resource": "*"
},
{
"Sid": "Allow attachment of persistent resources",
"Effect": "Allow",
"Principal": {
"AWS": [
"arn of admin user",
"arn:aws:iam::636161780776:root" // instructure account
]
},
"Action": [
"kms:CreateGrant",
"kms:ListGrants",
"kms:RevokeGrant"
],
"Resource": "*",
"Condition": {
"Bool": {
"kms:GrantIsForAWSResource": "true"
}
}
}
]
}????????????????????????????????????????????????????????????????????????????????
```

2. Create an SQS queue, and enable SSE. Provide the ARN of the newly-created CMK.

3. Create a new IAM policy, that grants access to the queue and the key, the policy needs to look exactly like this:

```
{
 "Version": "2012-10-17",
 "Statement": [{
 "Effect": "Allow",
 "Action": [
 "kms:GenerateDataKey",
 "kms:Decrypt"
 ],
 "Resource": "CMK arn"
 }, {
 "Effect": "Allow",
 "Action": [
 "sqs:SendMessage",
 "sqs:SendMessageBatch"
 ],
 "Resource": "queue arn"
 }]??????????????????????????????????????????????????
```

4. Create a new IAM user and attach the above policy. Save the access key and secret key, and provide them to us as part of the subscription.

How do I configure and test Canvas Live Events using HTTPS delivery?

Canvas Data Services offers two choices for data delivery, each deployed to receive the same set of Live Events from Canvas: HTTPS endpoint and AWS SQS queue. Both HTTPS and AWS SQS can be run simultaneously.

This article discusses how to configure and test HTTPS delivery in Canvas Live Events. Learn more about SQS delivery.

Note: Live events data is processed in the same region as the Canvas instance they are emitted from.

Configuration Details

You can implement a Google Cloud Function to receive events from Canvas and store them in a Google Cloud Storage bucket.

The following steps are needed in order to process incoming Canvas Live Event messages through the HTTPS endpoint:

1. Signed JWT payloads should be set to On
2. The event message, once received by the Google Cloud Function, should be decoded using RS256.
3. Once decoded, the JWT signature will contain a "kid" property. This property should be matched against one of the "kid" values retrieved from this public URL: https://8axpcl50e4.execute-api.us-east-1.amazonaws.com/main/jwks
4. Transform the payload and store the resulting event. In other words, do not store signed and encoded messages for too long, because the "kid" values will eventually become expired. AWS rotates keys once a month on the 30th. The most current "kid" is the one in the middle.

Event Headers

In addition, there are three types of headers when Canvas generates an event :

1. Request header when event gets triggered in Canvas (assuming the event was generated based on the request). The data from request is put into an event metadata object e.g method, request id, referrer URl, etc.
2. AWS adds additional data to an event envelope when it passes it from one service to another (e.g timestamp when event was delivered to SQS).
3. JWT standard header, these data gets added when we sign each event.

Difference between HTTPS and AWS SQS

The HTTPS endpoint delivered events have a few additional properties. When AWS SQS delivered events are collected via an AWS lambda function, there is an opportunity to write the events in batches - up to 10 event messages at one time. This results in files which have up to 10 event messages, compared to the files for events delivered through the HTTPS endpoint, which will result in one file per event. In other words, for the same set of events, the folder for the HTTPS endpoint will have 10 times as many files as the folder containing data retrieved via the SQS queue.

Canvas Data 2

What is Canvas Data 2?

Canvas Data 2 provides streamlined, bulk access to low-latency data for customers and partners to enable data warehouses and learning analytics.

For more information about Canvas Data 2, view the API specification.

Notes:

- Features that allow users to interact with analytics or generate reports from within the Canvas Learning Management System (LMS) user interface are not part of this work.
- New users without access to Canvas Data 1 should contact their Customer Success Manager (CSM) to be onboarded to Canvas Data 2. Current Canvas Data 1 users will be onboarded to Canvas Data 2 on a phased, rolling basis.

Canvas Data 2

Canvas Data 2 offering is a set of services and technologies that provides institutions with access to download their raw data across various Instructure educational products. Canvas Data 2 allows institution IT/data teams to retrieve their school's LMS data in bulk and keep it up-to-date (4 hours of data freshness) to conduct their own research and build custom reports, dashboards, and tools to meet the unique needs of the institution. Canvas Data 2 allows access to high-fidelity source data and provides more granular data.

Audience and Usage

The intended audience for this tool is institution data analysts, developers, or data administrators with some knowledge of raw data collection and transformation.

Institutions are likely to use this data for analytics and custom reporting initiatives.

Usage:

- Low latency (4 hours)
- Transactional data
- Operational data
- Bulk transfers

Note: Canvas Data 2 is an opt-in product, nevertheless in the initial phase as customers are onboarded in an ongoing fashion, the data freshness may be higher than 4 hours.

Data Schema and Versioning

Canvas Data 2 introduces a new relational data schema instead of the star schema from Canvas Data 1.

The Canvas Data 2 schema is versioned; any updates (additions and deletions) create a new schema version for a table.

Data Refresh and Formats

Data is available approximately within 4 hours from the transaction in Canvas.

The following formats are available:

- JSON
- CSV
- TSV
- Parquet

Datasets

There are 89 unique datasets (tables).

Data will be available as snapshots (state at current point in time) or incremental updates (most recent changes between two points in time).

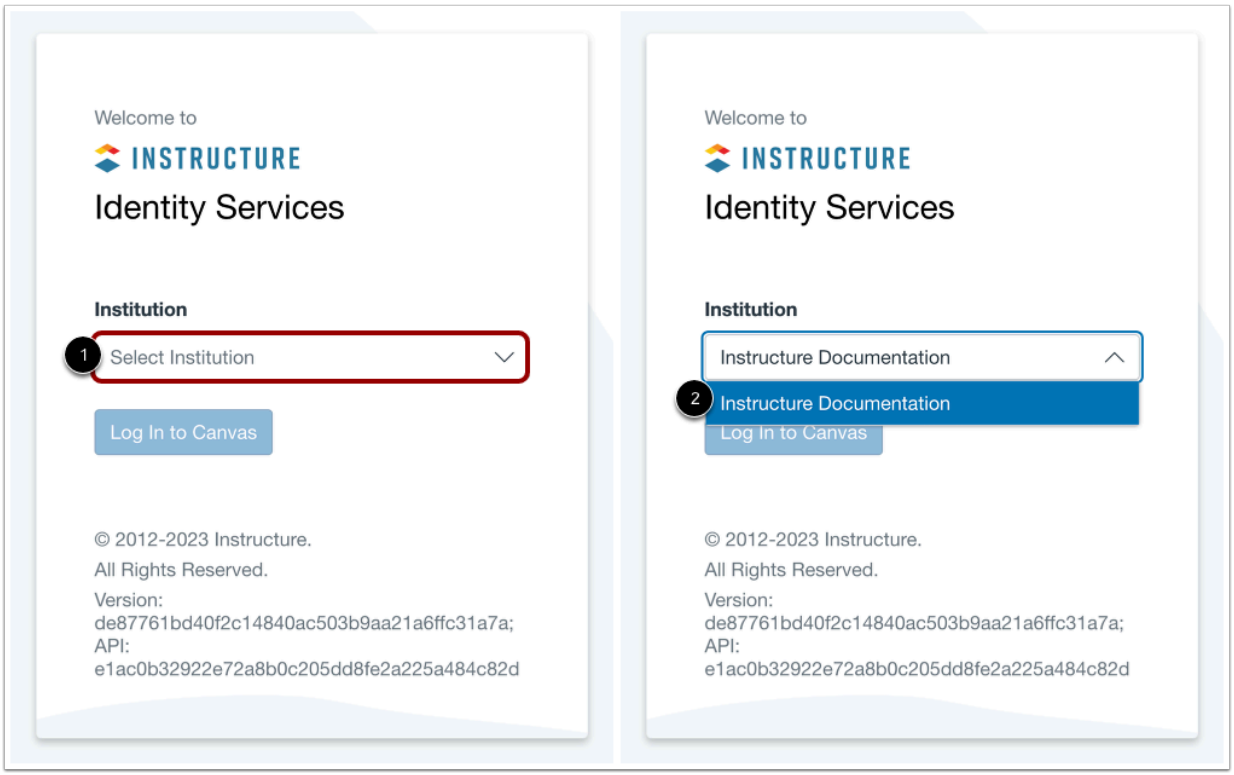
How do I generate a Canvas Data 2 API key?

As an account admin, you can generate a Canvas Data 2 Client ID and Secret using Identity Services. Once you generate a Client ID and Secret, you can manage Canvas Data 2 API key.

Notes:

- Your institution must be included in the account domain lookup. Please contact your Customer Success Manager if your institution does not appear in the search list.
- You must be logged into Canvas to authorize access.

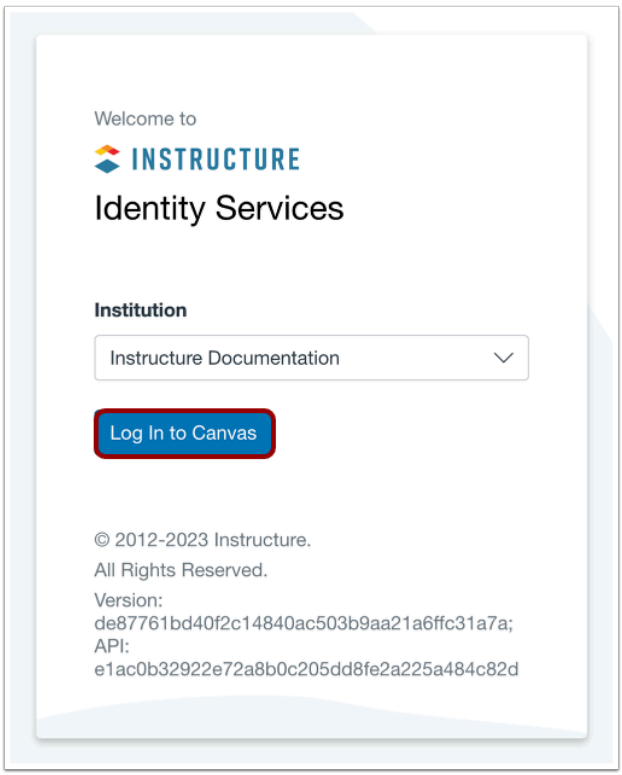
Find Institution



In your web browser, visit identity.instructure.com. In the **Institution** drop-down menu, search for your institution by entering its name [1]. Once it appears, click your institution's name [2].

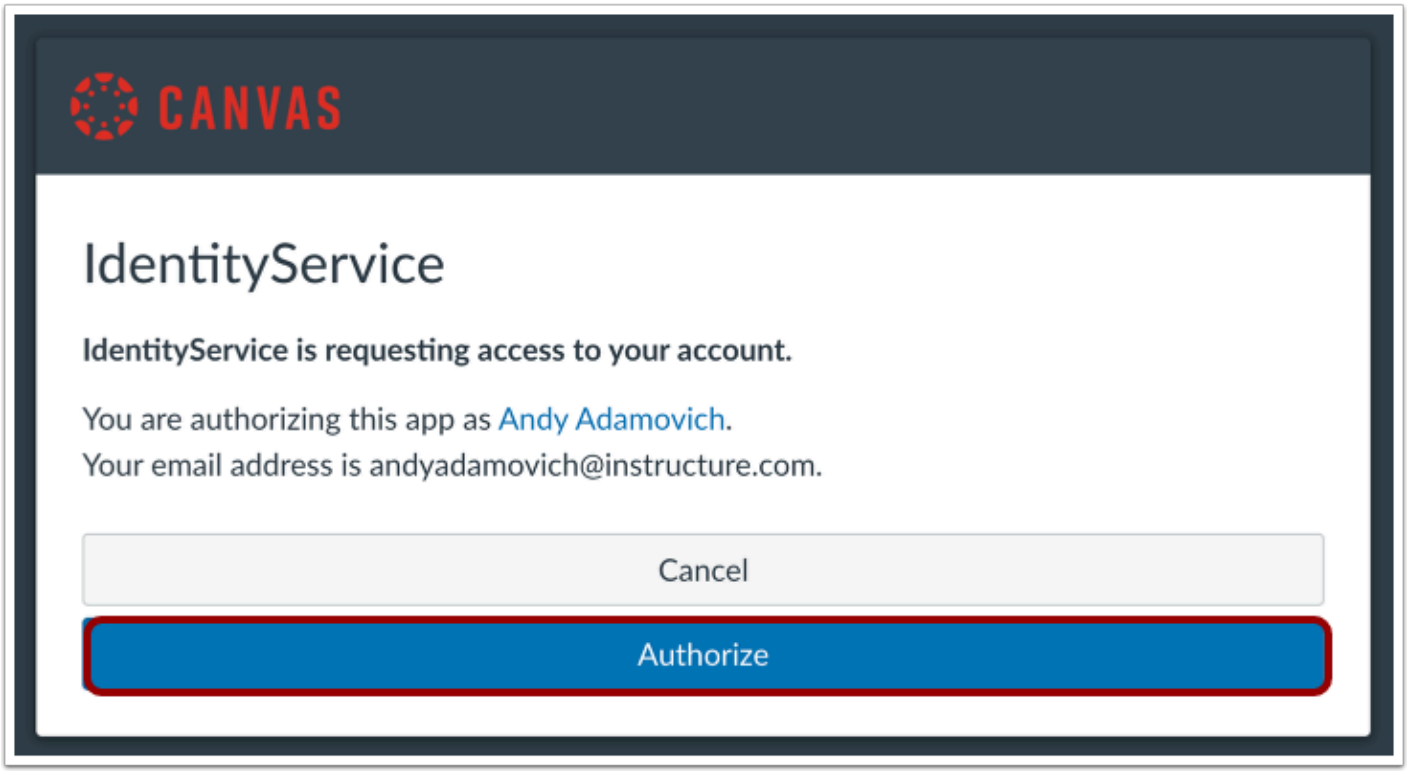
Note: If your institution does not appear in the search list, please contact your Customer Success Manager about account domain lookup.

Log into Identity Services



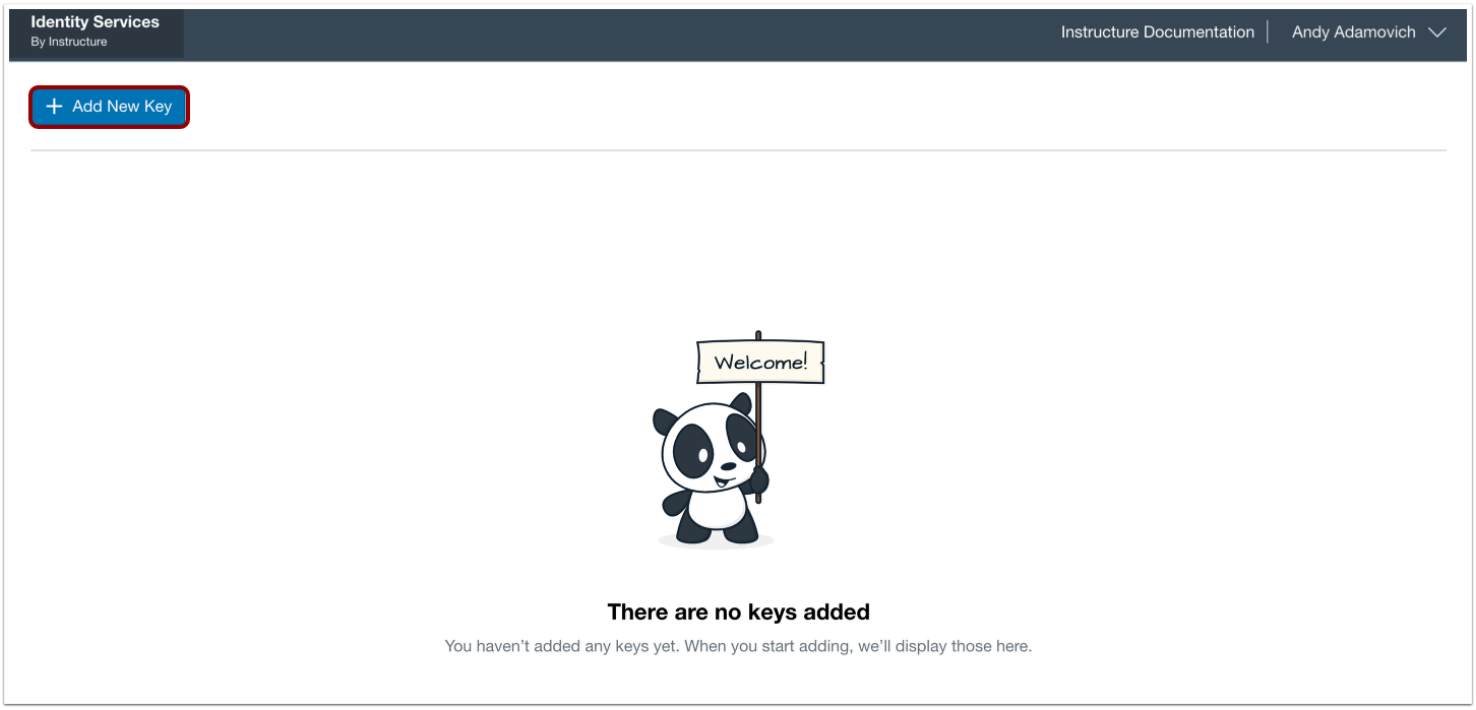
Click the **Log In to Canvas** button.

Authorize Access

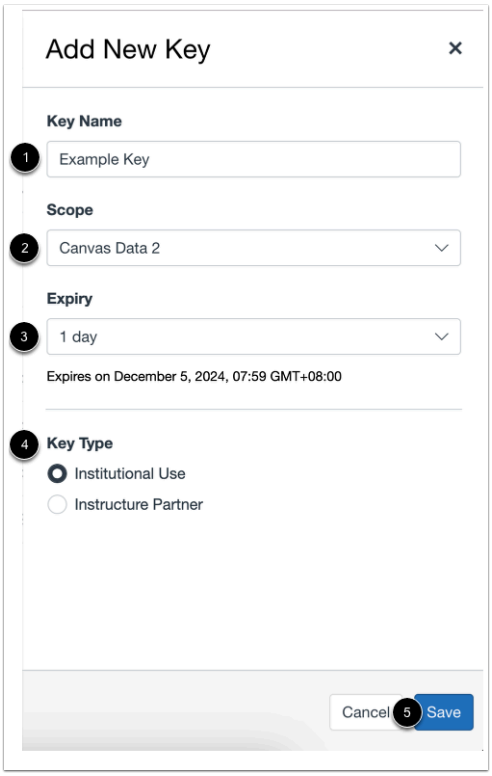


To authorize Identity Service to access your account, click the **Authorize** button.

Add New Key



To add a new key, click the **Add New Key** button.



In the **Key Name** field, enter a name for the key [1].

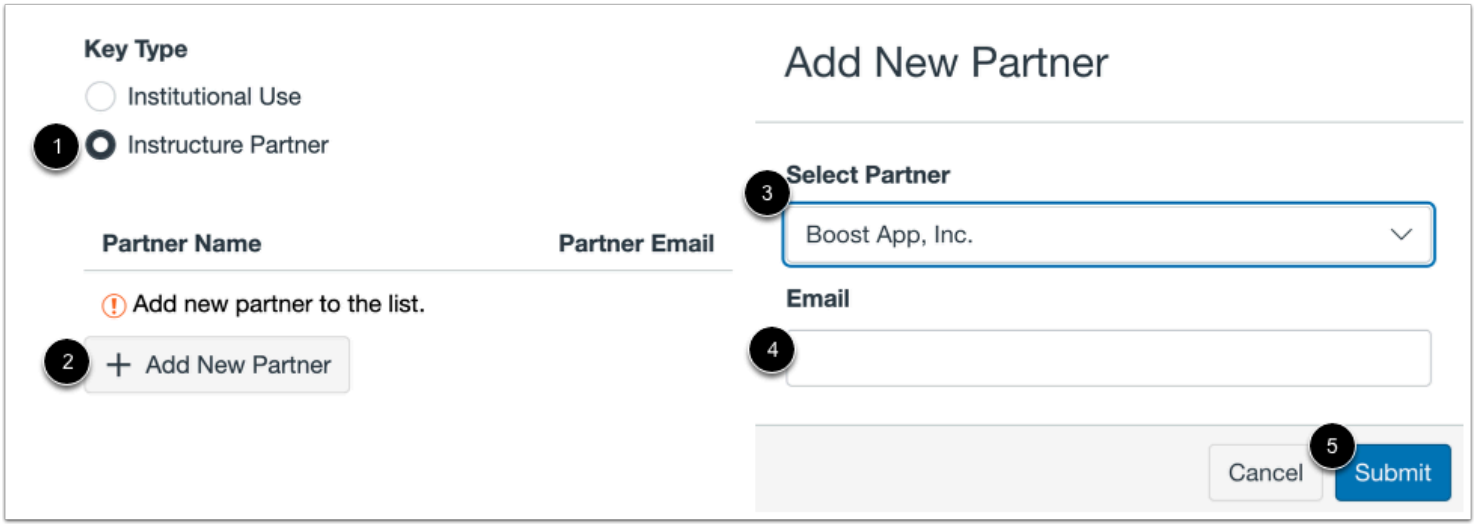
In the **Scope** drop-down menu, select **Canvas Data 2** [2].

In the **Expiry** drop-down menu, select the expiration time (1 day, 1 week, 1 month, 6 months, 1 year) [3].

In the **Key Type** section, click the **Institutional Use** or **Instructure Partner** radio button [4].

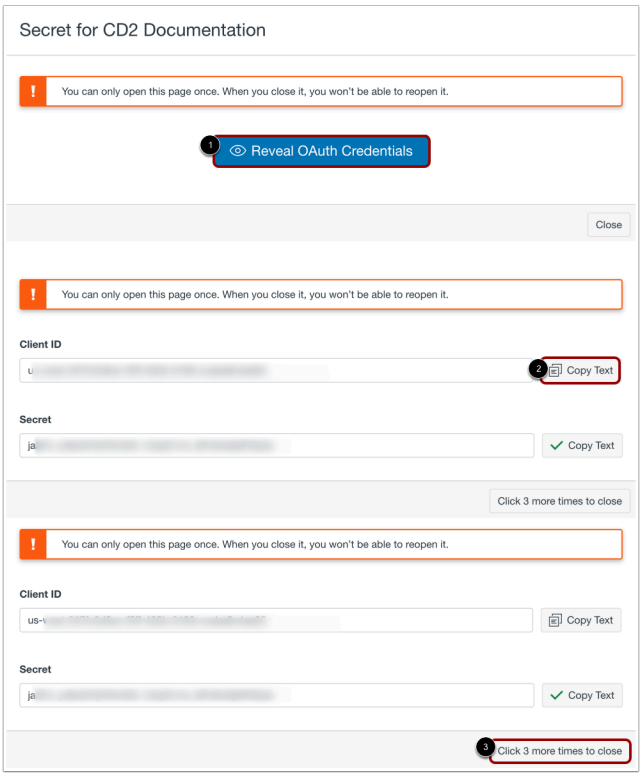
Click the **Save** button [5].

Add New Instructure Partner



Click the **Instructure Partner** radio button [1] and click the **Add New Partner** button [2]. In the **Select Partner** drop-down menu [3], select your partner. In the email field, enter their email address [4]. Click the **Submit** button [5].

Copy API Key and Secret



To reveal your Client ID and Secret, click the **Reveal OAuth Credentials** button [1].

To copy your Client ID and Secret, click the **Copy Text** button next to the Client ID and Secret fields [2].

To avoid accidental closing before copying the Client ID and Secret, you need to click the **Click 3 more times to close** button [3].

Notes:

- The Client ID and Secret window can only be opened one time. When you close it, you cannot reopen it.
- If you do not copy the generated Client ID and Secret and close the window, you will need to generate a new Client ID and Secret.

View Generated API Key



Key name	Partner	Creation Date	Expiration Date	Manage Key
CD2 Documentation	Instructure	10/03/2023	09/09/2023	
CD2 Doc Key	Instructure	22/02/2023	24/03/2023	

View the generated API key name. Once the API key is generated, you can manage the API key.

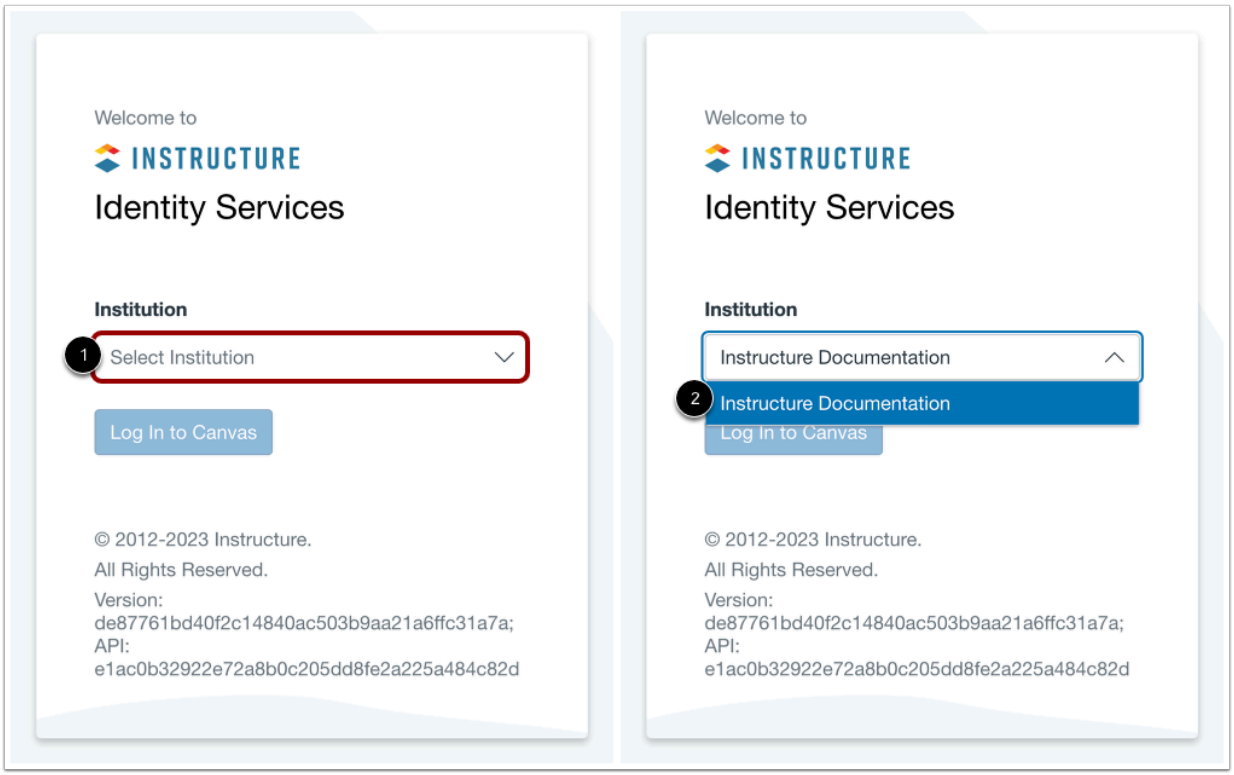
How do I manage my Canvas Data 2 API key?

As an account admin, once you generate a Canvas Data 2 API key, you can manage a Canvas Data 2 API key.

Notes:

- Your institution must be included in the account domain lookup. Please contact your Customer Success Manager if your institution does not appear in the search list.
- You must be logged into Canvas to authorize access.

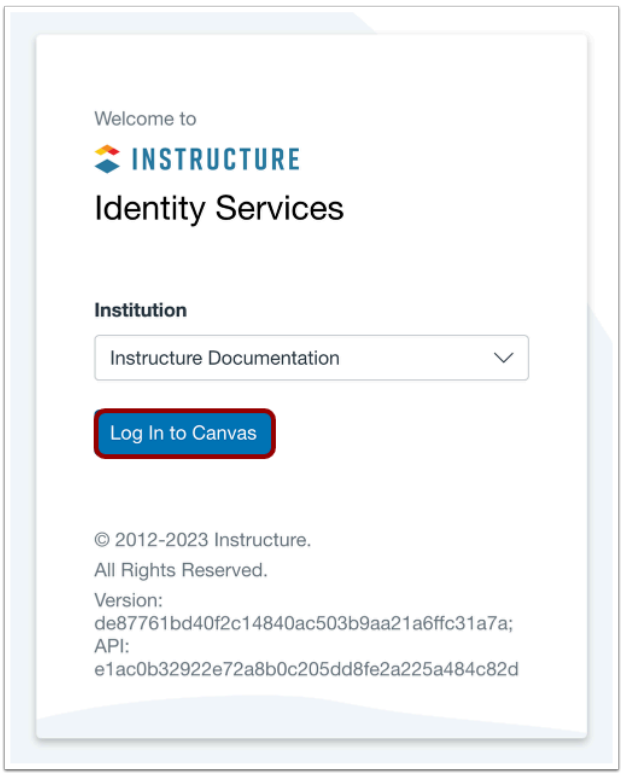
Find Institution



In your web browser, visit identity.instructure.com. In the **Institution** drop-down menu, search for your institution by entering its name [1]. Once it appears, click your institution's name [2].

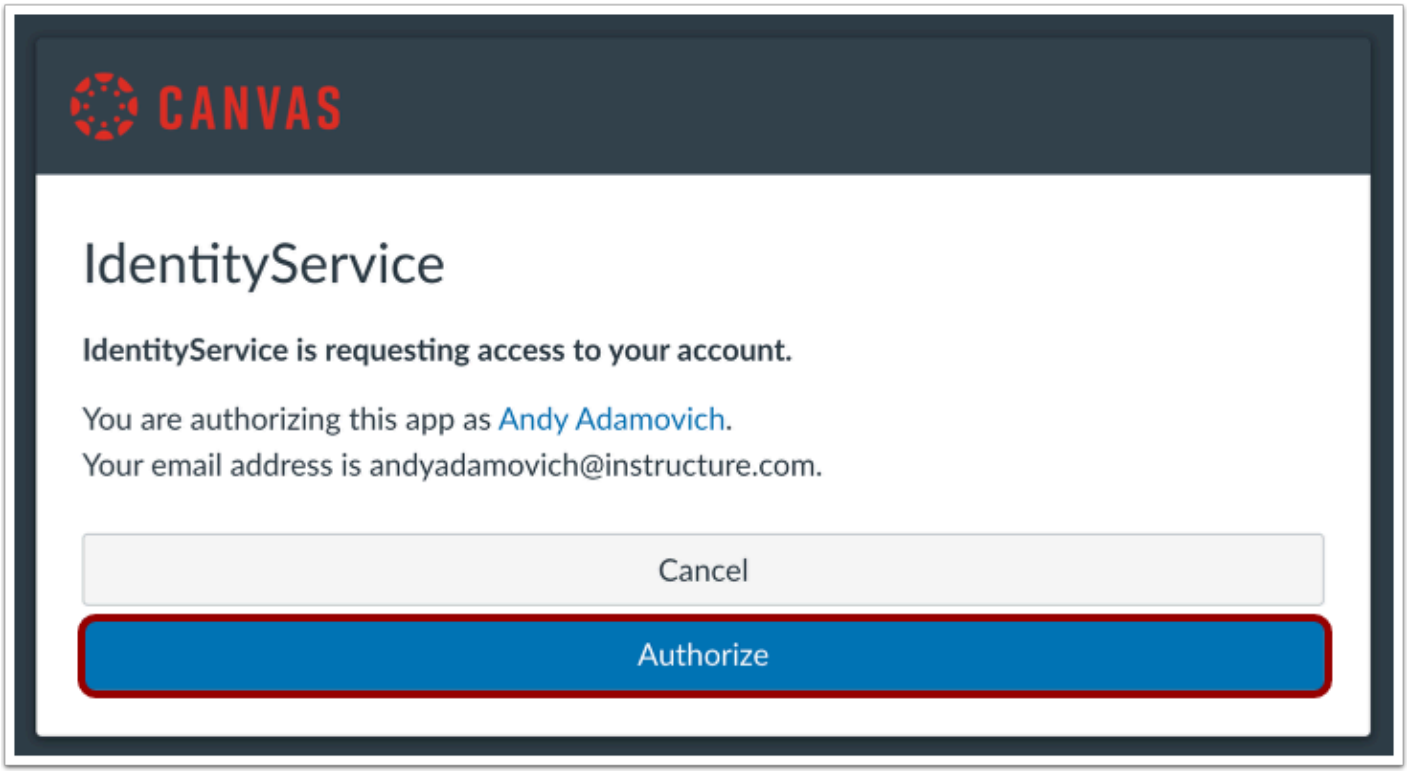
Note: If your institution does not appear in the search list, please contact your Customer Success Manager about account domain lookup.

Log into Identity Services



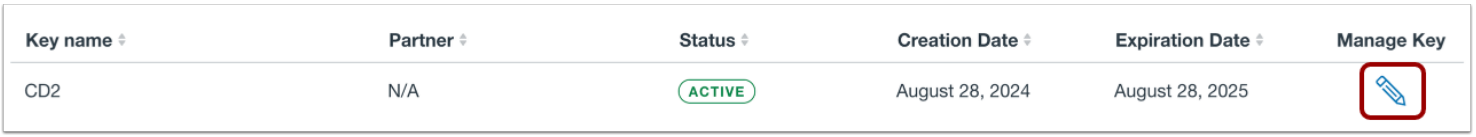
Click the **Log In to Canvas** button.

Authorize Access



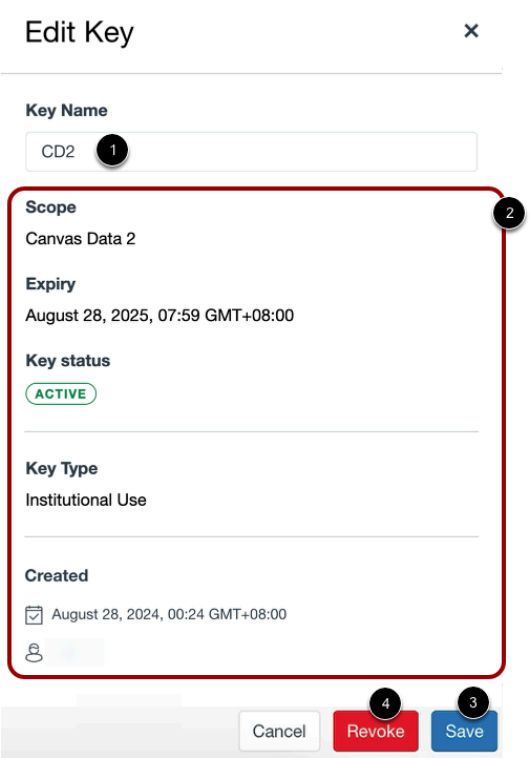
To authorize Identity Service to access your account, click the **Authorize** button.

Manage API Key



To manage the API key, click the **Edit** icon.

Edit API Key



You can edit the name of the API key [1]. You can view the expiration date, key type, creation date, and creator [2].

To save the edited name, click the **Save** button [3].

To revoke the API key, click the **Revoke** button [4].

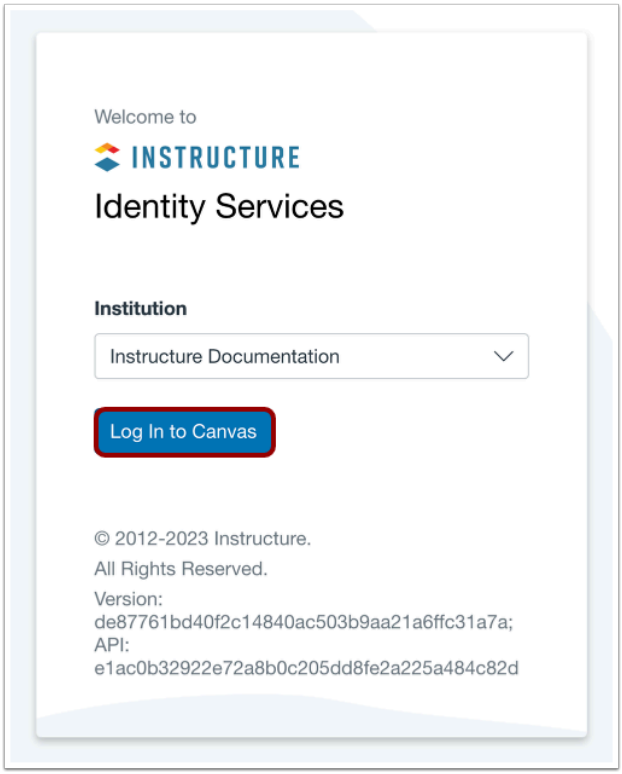
How do I get authorized to connect Canvas Data 2 via an API Client (Postman)?

Once you have authenticated through Postman or your API Client, you can set up Canvas Data 2.

Notes:

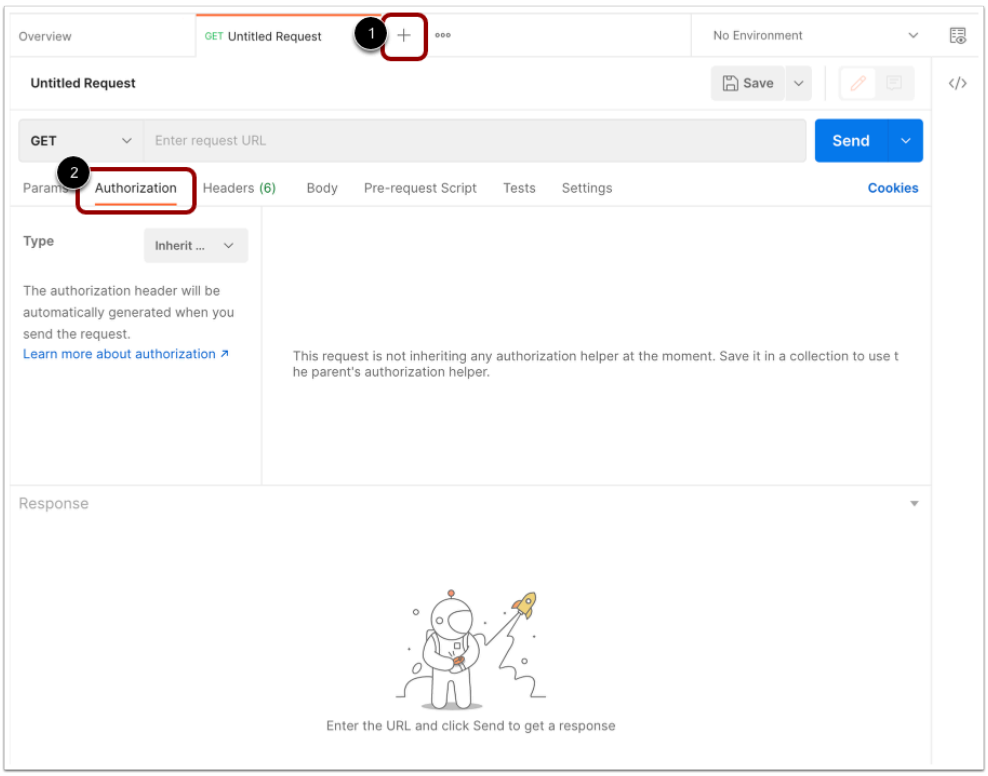
- First you need to generate a Client ID and Secret.
- You need to know how to use an API client. This article uses Postman.
- You can also use a CURL script to retrieve a token.

Generate Client Credentials via Identity Services



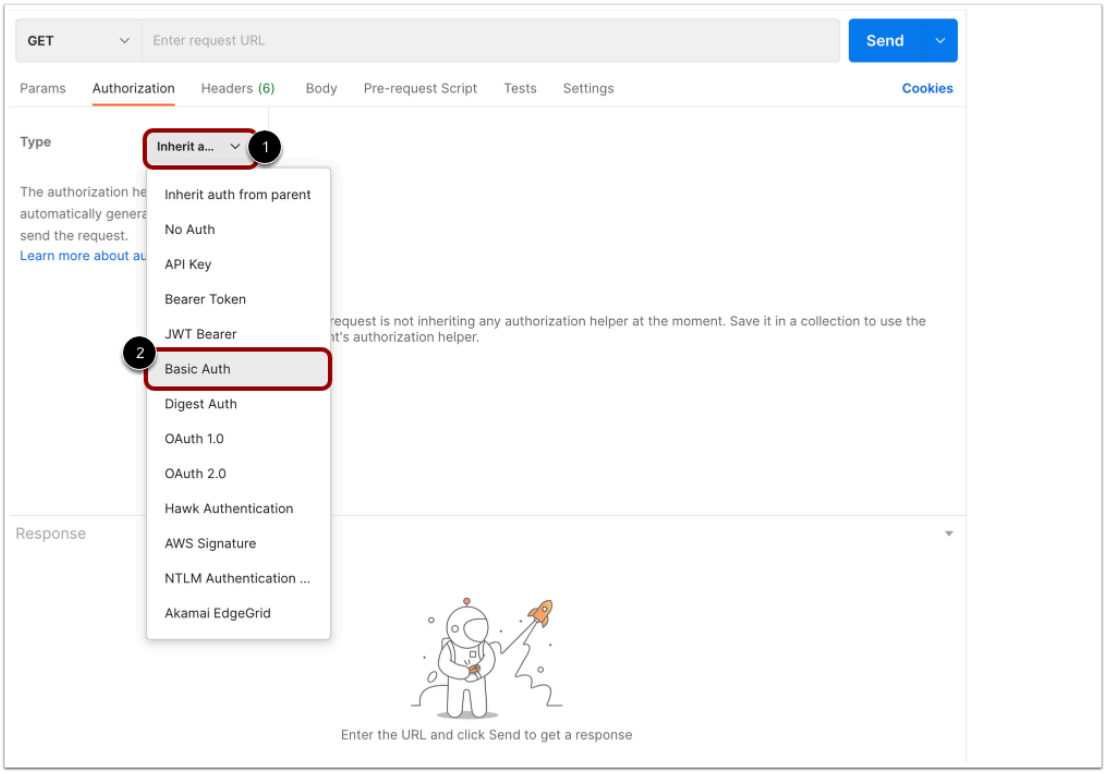
Before using a Postman, you need to generate a Client ID and Secret for Canvas Data 2.

Add New Authorization Request



In Postman, to add a new request, click the **Add** tab [1] and then click the **Authorization** tab [2].

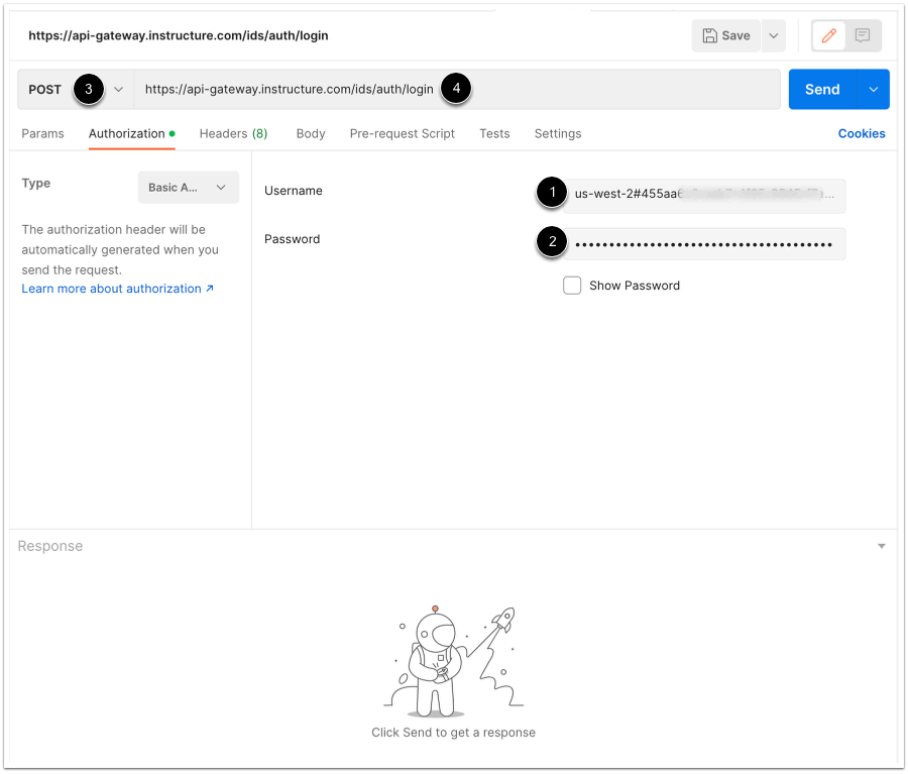
Select Authorization Type



In the **Authentication Type** drop-down menu [1], select the **Basic Auth** option [2].

Note: You can also use a CURL script to retrieve a token.

Enter User Credentials



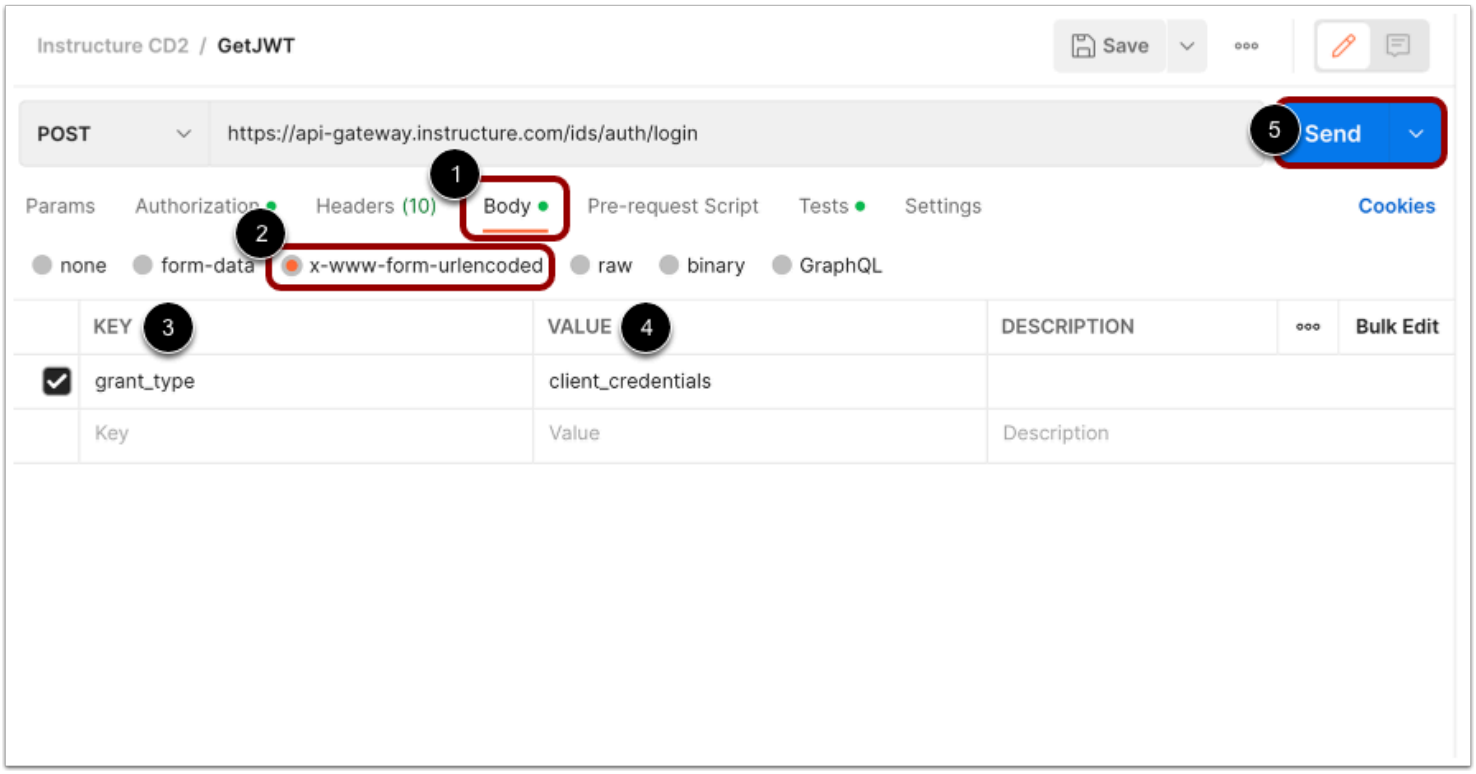
Enter the user credentials:

- **Username (Client ID) [1]**: enter the developer key generated in Identity Services
- **Password (Client Secret) [2]**: enter the secret generated in Identity Services

Select **POST** method as the request type [3], and set the following URL [4]:

```
https://api-gateway.instructure.com/ids/auth/login
```

Generate Access Token



In the **Body** tab [1], select the **x-www-form-urlencoded** option [2]. In the **KEY** field, enter "grant_type"[3] and in the **VALUE** field, enter "client_credentials" [4].

Click the **Send** button [5].

In case of successful authorization, you will receive the access token in the API response. You can use this short-lived token to send request to the CD2 API.

For all available requests, check the Canvas Data 2 API Documentation.

You can also use the preconfigured requests from the Postman collection described in the set up Canvas Data 2 in Postman document.

How do I set up Canvas Data 2 with an API client (Postman)?

After generating a Canvas Data 2 (CD2) ClientID and secret, you can set up Canvas Data 2 via the API Gateway.

This article references the API client, Postman, however, you can use any API client of your choice.

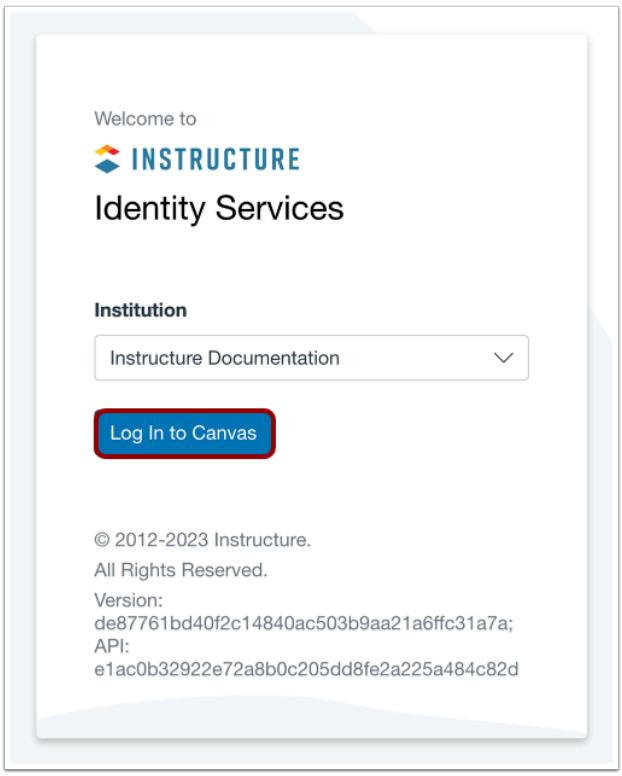
Use Canvas Data 2 API Resources

- View Canvas Data 2 Usage Workflow resource document
- API specification and schema
- Step by step video with Postman
- Example with Postman using a Client ID and Client Secret pair for authorization: collection and environment file

Notes:

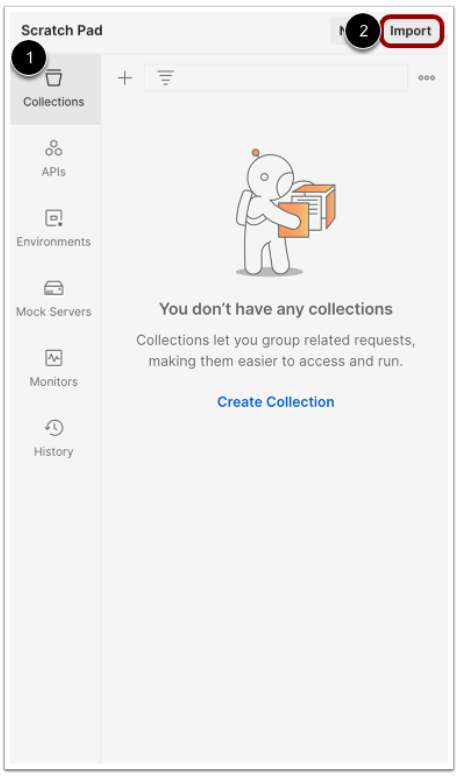
- The Postman reference solutions are examples and were created to demonstrate and make it easier to quick start and try out the API flow. We are not committing to maintain it for this community. You can use any API client of your choice.
- If you are using Postman client then it is good to know that if you download the OpenAPI spec, it can be directly imported into Postman (and most probably other API clients have similar features).

Generate Client ID and Secret



Before using Postman, you need to generate a Client ID and Secret for Canvas Data 2.

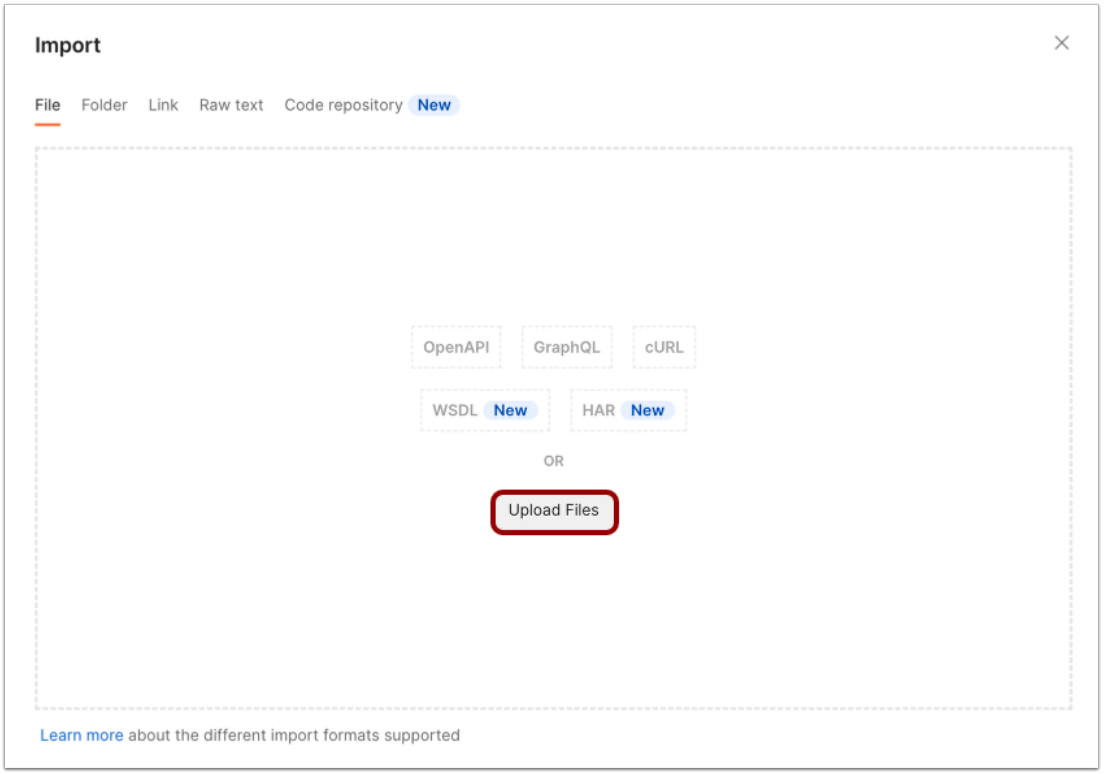
Import Collection File



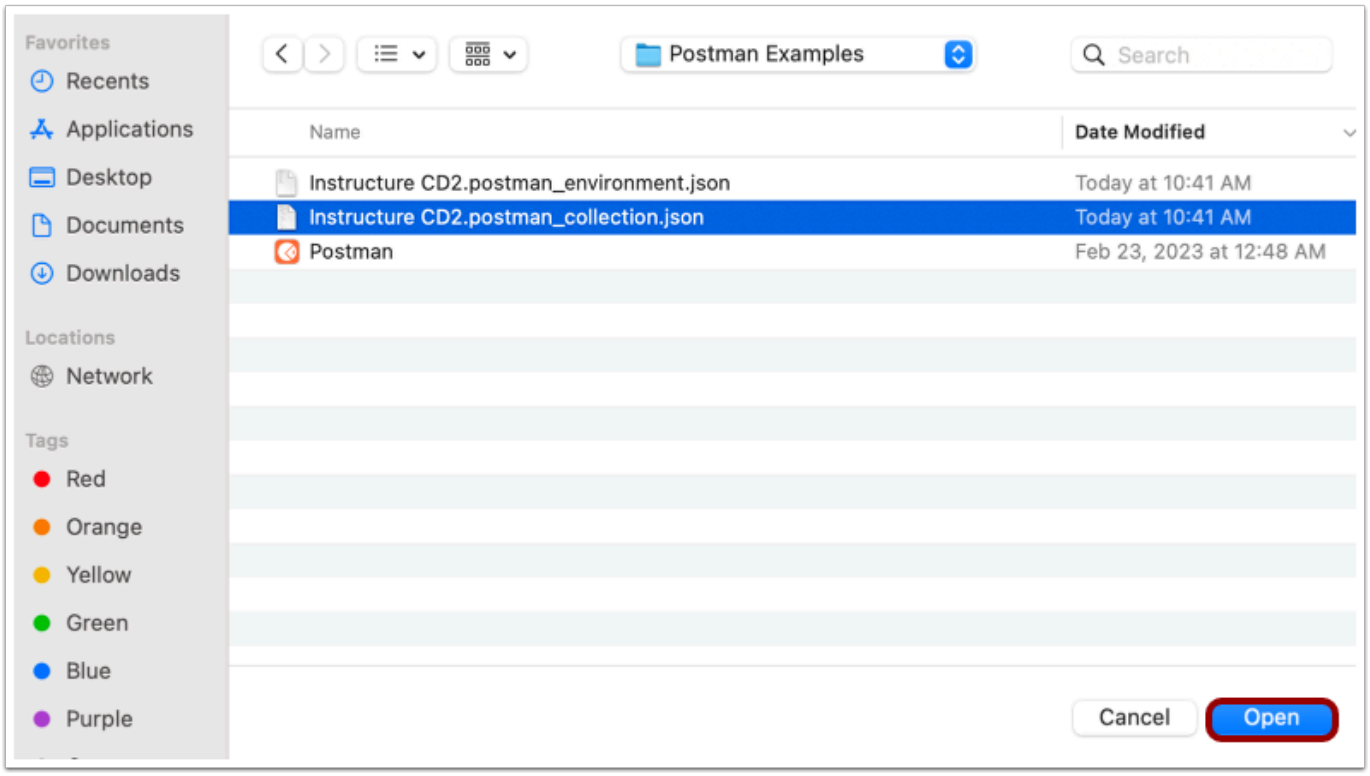
In Postman, click the **Collections** link [1] and then click the **Import** button [2].

Download and import the Postman Collection file.

Upload Collection File

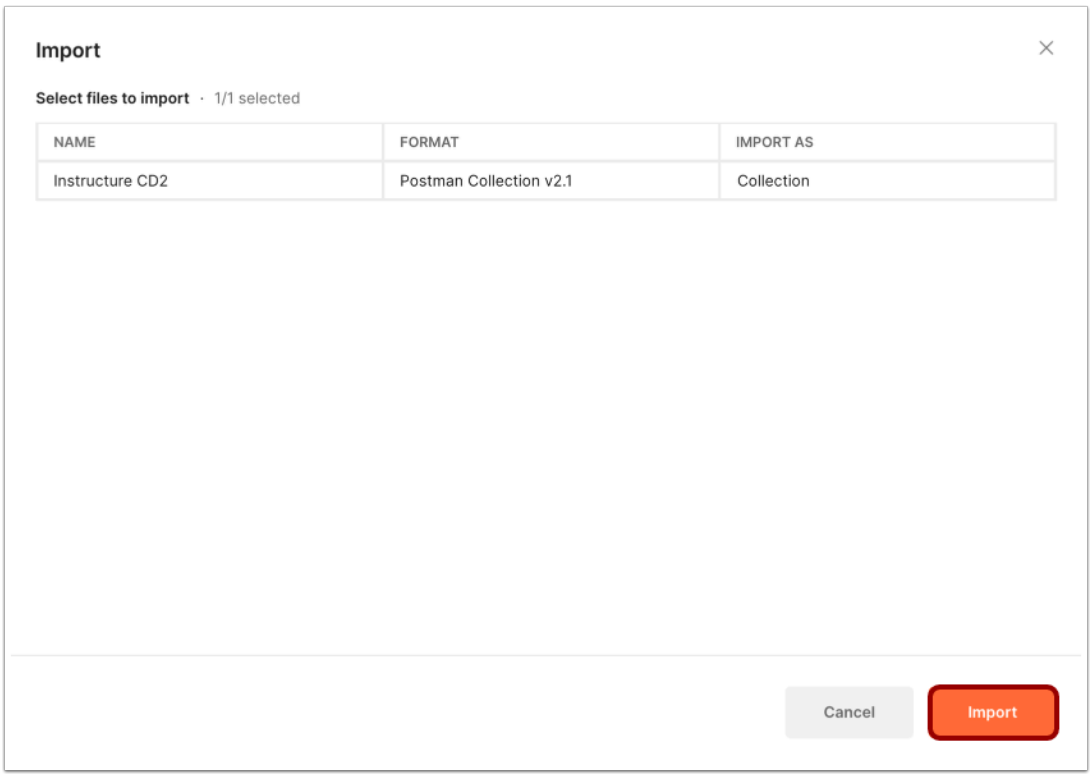


Click the **Upload Files** button.



Locate the collection file and click the **Open** button.

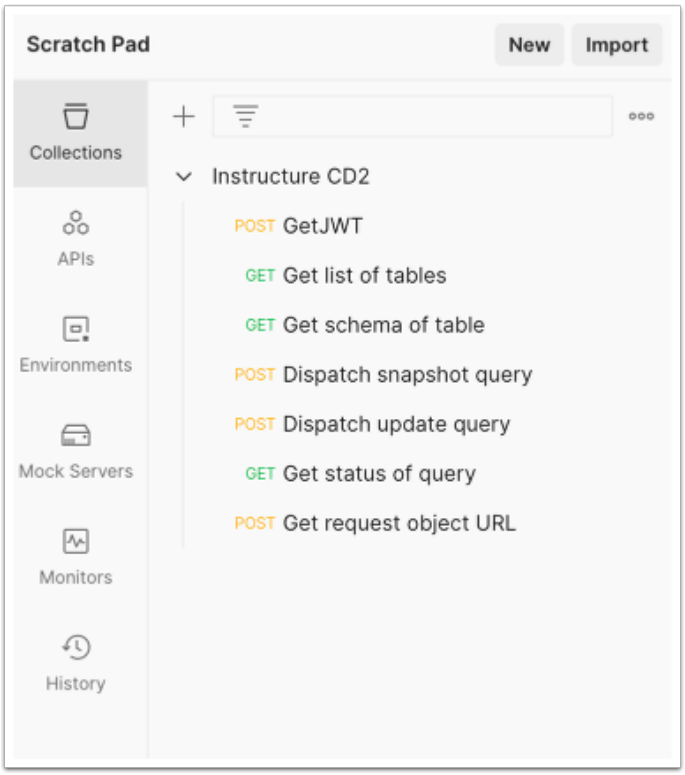
Import Postman Collection File



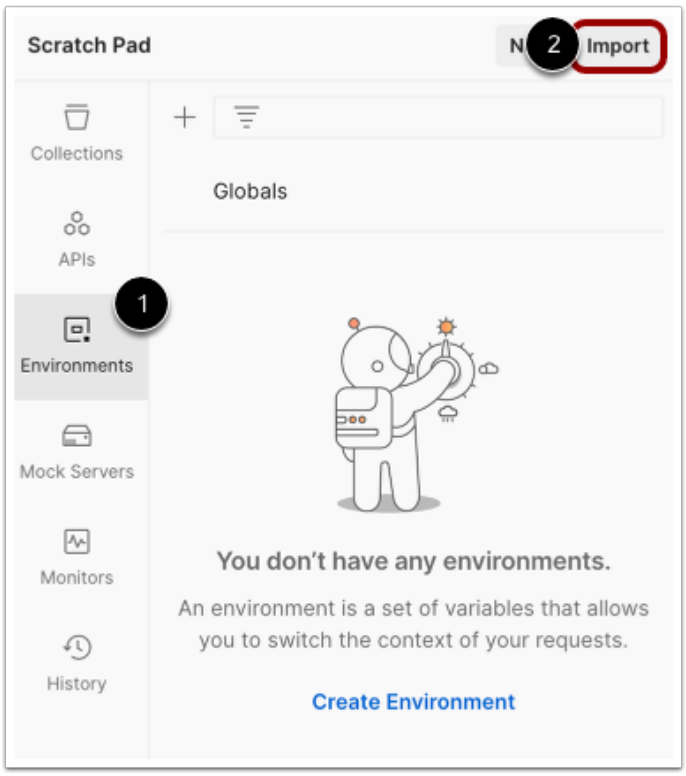
Click the **Import** button.

View Collection

View the collection file.


Scratch Pad
New
Import
Collections
APIs
Environments
Mock Servers
Monitors
History
Instructure CD2
POST GetJWT
GET Get list of tables
GET Get schema of table
POST Dispatch snapshot query
POST Dispatch update query
GET Get status of query
POST Get request object URL

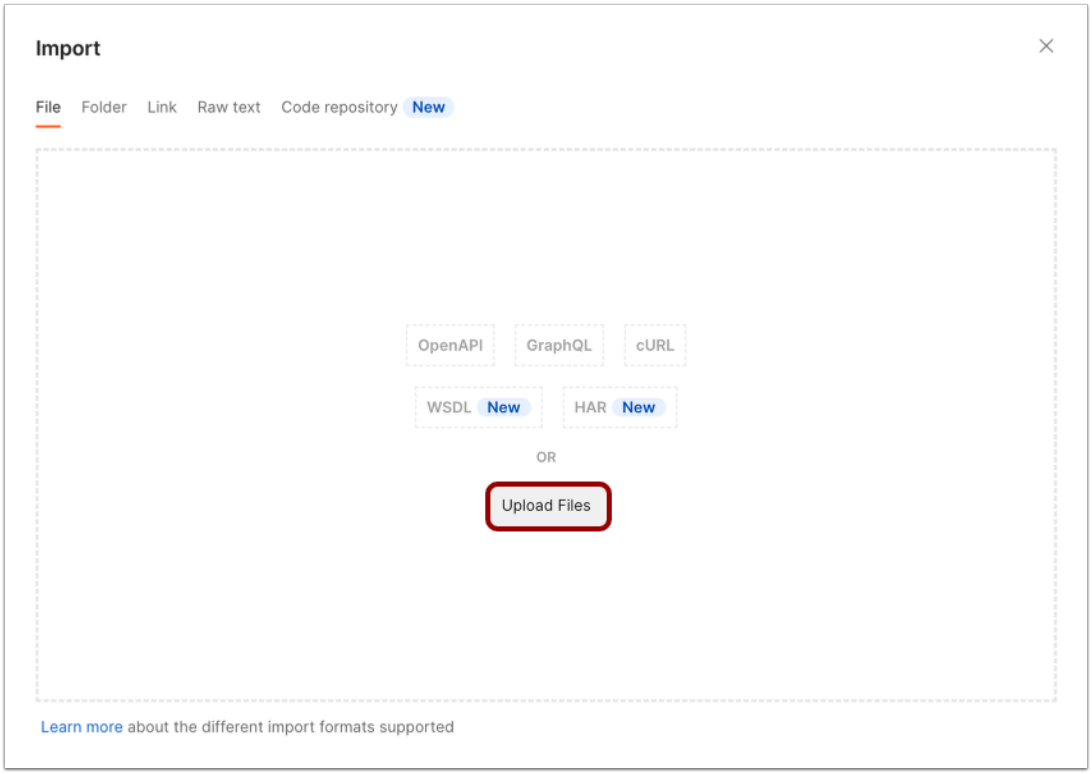
Import Environment File



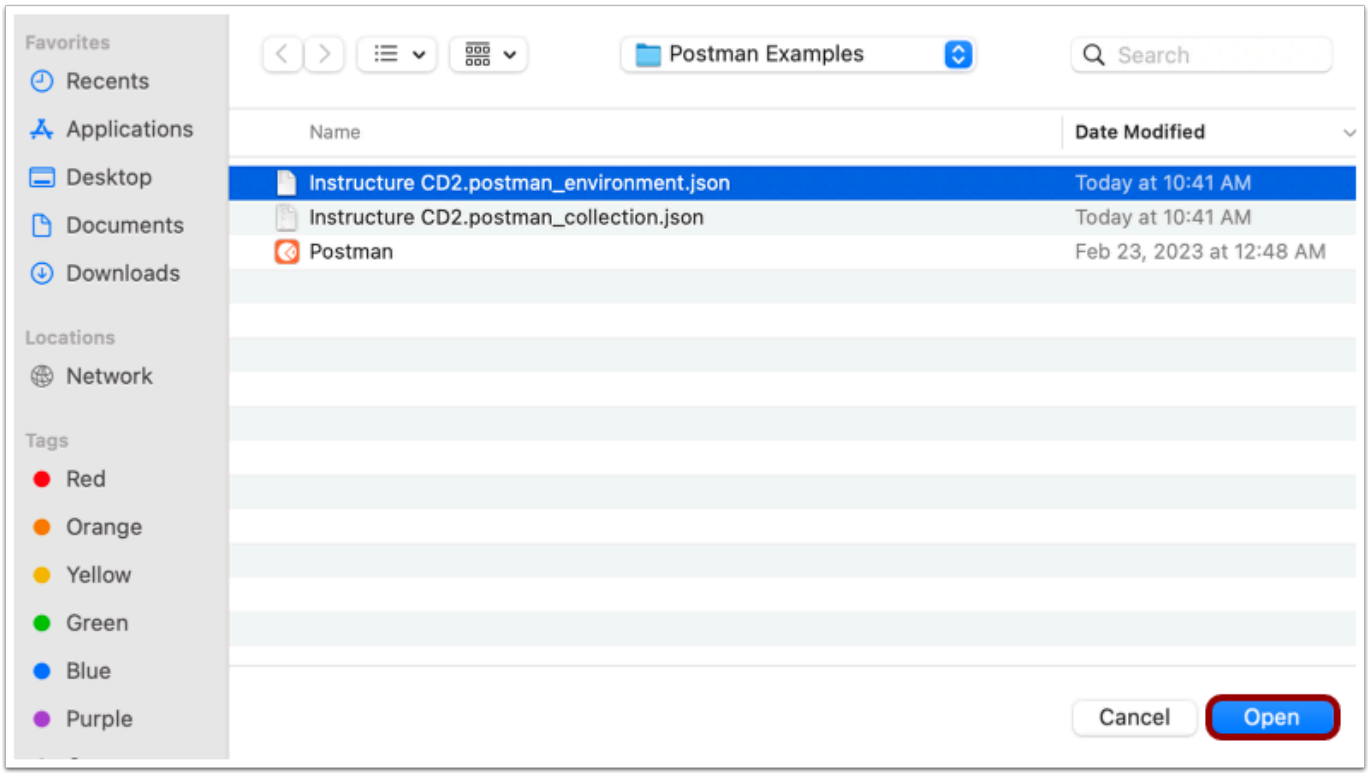
In Postman, click the **Environments** link [1] and then click the **Import** button [2].

Download and import the Postman Environment file.

Upload Files

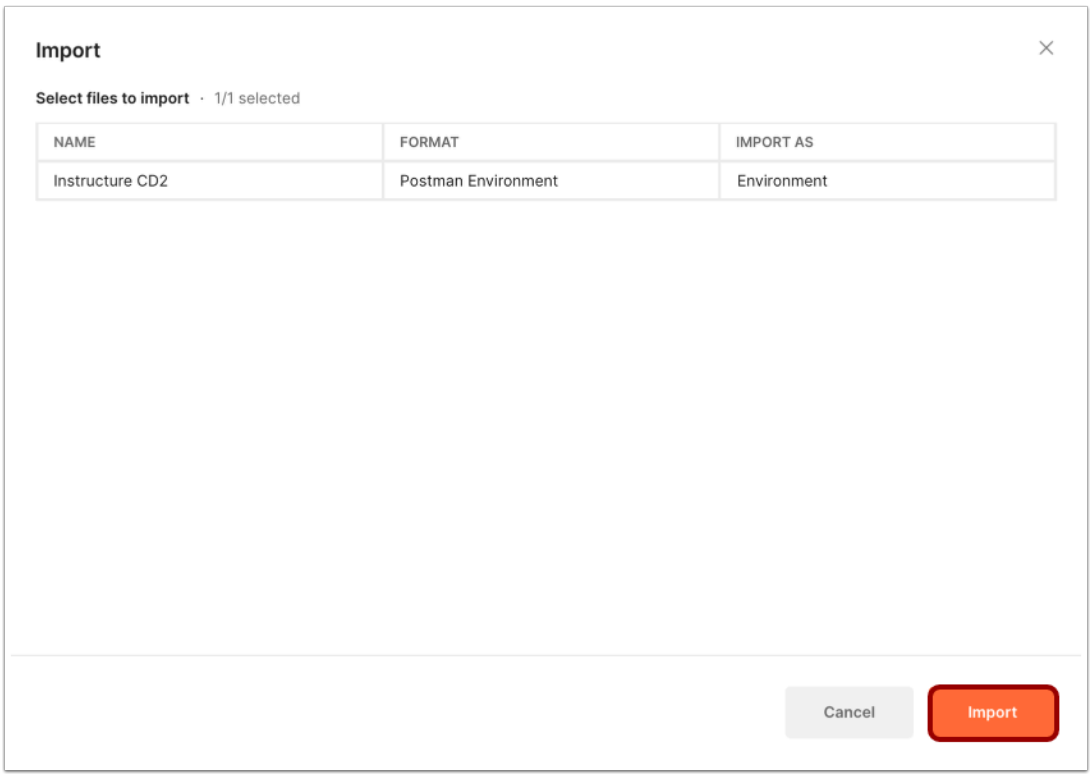


Click the **Upload Files** button.



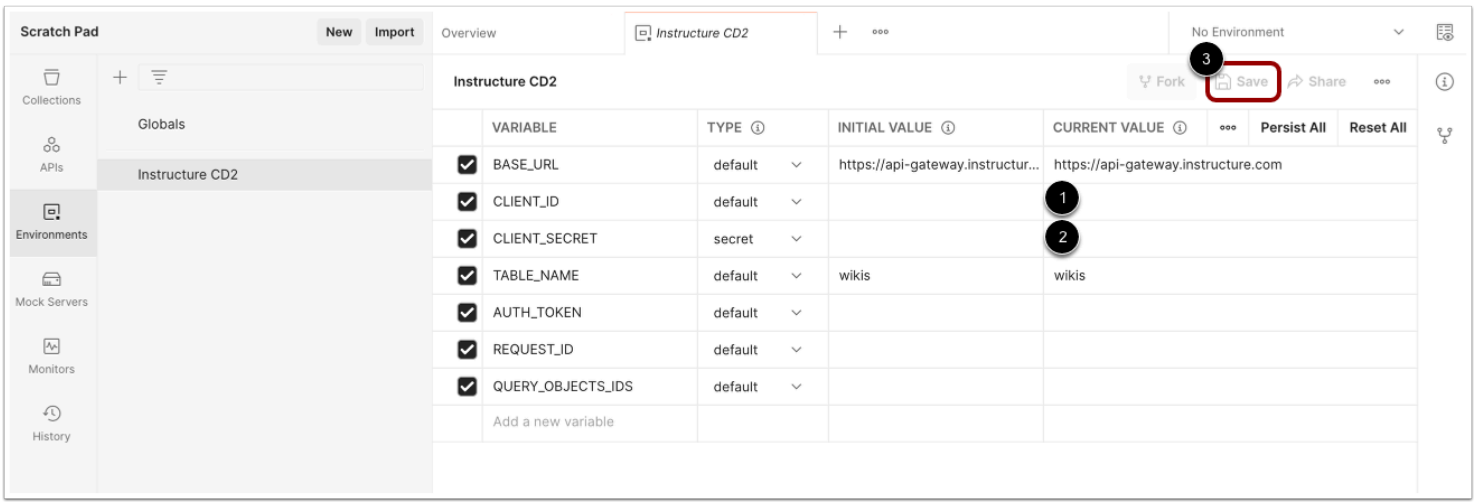
Locate the collection file and click the **Open** button.

Import Postman Environment File



Click the **Import** button.

View Environment



View the environment.

In the **CLIENT_ID** field [1] and **CLIENT_SECRET** field [2], add the Client ID and Secret generated in Identity Services.

To save the collection, click the **Save** icon [3].

View Additional Resources

- Entity relationship visualiser

How do I use the Canvas Data 2 Command Line Interface (CLI) Tool?

A small Command Line Interface (CLI) tool is available for syncing data from the Canvas Data API.

You can use the CLI through your terminal (OSX/Linux), command prompt (Windows), or through the Bash terminal in the Windows Linux Sub system.

For complete details on using the CLI, refer to the Data Access Platform Client Library documentation.

Download the Canvas Data 2 Command Line Interface (CLI) Tool

You can download the Python package from Python Package Manager. For installation, you may also need to specify extra features. For details, refer to the Installation section of the Data Access Platform Client Library documentation.

View Additional Resources

In addition to the Data Access Platform Client Library documentation, you can view the following videos:

- Setting the environment variables on Mac OSX
- Using the CLI tool with environment variables set

Canvas Data 2 Frequently Asked Questions

This document includes some of the most frequently asked questions about Canvas Data 2 (CD2).

What is Canvas Data 2?

The goal of Canvas Data 2 (API) is to provide efficient access to data for download collected across various educational products in bulk with high fidelity and low latency.

Canvas Data 2 is not an analytics or reporting tool but it is built to share high-fidelity source data to power schools' analytics and custom reporting initiatives.

How do I get started with Canvas Data 2?

Canvas Data 2 datasets will be accessible via Application Programming Interface (API) and Command-line interface (CLI) or by leveraging our CLI Python Libraries.

How to report bugs/issues?

Send an e-mail to: canvasdatahelp@instructure.com and expect a response within 48 hours.

Will Canvas Data 2 give me access to data from the Requests Table?

Yes. Data from the weblogs are available in Canvas Data 2.

What is the expected data freshness going to be for Canvas Data 2?

Less than 4 hours from the time data is written to the application databases.

How to add Canvas Data 2 easily to Postman?

If you are using Postman client then it is good to know that if you download the OpenAPI spec, it can be directly imported into Postman (and some other API clients have similar features).

Otherwise you can use the reference Postman collection as a quick start.

How do I get the schema?

Either by the schema endpoint (API or CLI) or by downloading the OpenAPI spec. The top-level object is a mapping between Canvas table names and their JSON schema.

Additionally, you might also want to consult any or all of the resources below:

- Entity relationship diagram

Canvas Data 2 Technical Frequently Asked Questions

This document includes some of the technical frequently asked questions about Canvas Data 2 (CD2).

What does the timestamp 'ts' mean in the 'meta' field of the query result-set?

`ts` is a last modified timestamp (or commit time) for the record in the table. When a new record is inserted into a table hosted by CD2, it is assigned the time of insertion. When that record is later updated, the timestamp is refreshed to match the time when the update took place. Finally, when the record is eventually deleted, the timestamp reflects the time of deletion.

How do 'since' and 'until' relate to 'ts' in the result-set?

`since` and `until` are filters on the commit time (or last modified timestamp). All records in the result-set are in range of `since` and `until`.

Can I get duplicate records of the same key in the result-set?

No; keys in the result-set of a snapshot or incremental query are always unique.

How do I turn an incremental query result-set into a SQL statement?

You would probably want to use an INSERT-or-UPDATE statement. In PostgreSQL, this looks like as follows:

```
INSERT INTO ... (...)
VALUES (...)
ON CONFLICT (...)
DO UPDATE SET ...
```

What do I do with records in the result-set that have a 'key' but no 'value'?

Output records that have a `key` field but no `value` field correspond to deleted records. The data is no longer available in Instructure's systems, and should also be deleted from your local copy. These records are also marked with an action of D in meta.

What does '__cd2_oversized_truncated__' mean? (Some of the fields/columns can have this as a value.)

`__cd2_oversized_truncated__` is a special placeholder (string constant) that indicates that the original data was too large to include in the result, usually several MBs in size. Unfortunately, it is not possible to recover the value of these fields/columns. However, such large values are typically the result of a mistake (e.g. a student copying a binary Word document into a plain text field), and seldom carry valuable information useful for analytics.

How do I capture the state of the database at some point in time?

CD2 doesn't support point-in-time queries, you cannot reconstruct a previous historical state of the database, you can only synchronize your local copy to the most up-to-date state kept by Instructure.

How do I get all data from the beginning of time to a specific date?

Unfortunately, this is not supported by CD2. CD2 lets you bring your local database in sync with the current database state at Instructure. If a record has been updated or deleted in the source database in Instructure's domain, you cannot retrieve the previous versions of that record. However, records are available indefinitely so long as they exist in Instructure's systems, they don't fade away over time. For example, you should be able to get all courses a student has applied to, or all assignments they have submitted, because they all appear as different records, not versions of the same record.

How do I get a stream of all record transitions?

CD2 lets you bring your database to the latest state but doesn't (reliably) return interim states. Even if you try to poll the CD2 API query job endpoint with a short interval, multiple change data capture events to the same record will be coalesced into a single change, and only that single change will be returned in the incremental query result-set. CD2's output cannot serve as a change log of all database transitions, only as a means to bring your local database up-to-date with the latest state in Instructure's systems.

Troubleshooting

I got an HTTP 4xx status code as a response.

An HTTP 4xx class error (e.g. HTTP 400 Bad request) is a permanent error. To learn more about why your request was rejected, check the payload of the HTTP response. The HTTP body should be an `application/json` media type and contain an object with the `error` property. This includes information on why the request was rejected.

Some of my queries return a result-set in which 'meta' has a field called 'action' with values 'U' and 'D'. However, other queries don't have this field.

Incremental queries have the field `action` in `meta`, which specifies if a record was *upserted* (inserted or updated) or *deleted*. If a record is upserted, you would typically use an INSERT-or-UPDATE SQL statement in your database to update the record. If a record is deleted, you would use the DELETE SQL statement to remove the record.

Snapshot queries don't have `action` because it would be a redundant field. Snapshot queries assume your database is empty, and all records are to be inserted. You would typically use a COPY or INSERT statement to populate the database.

When I try to load a result-set with CSV format into another tool, I get an unexpected end of line error.

CSV output in CD2 complies with RFC 4180. Section 2.6 of this specification, which talks about how newlines in values are represented, is often inadequately implemented in tools. Specifically, if a value has an embedded newline character, the output should be enclosed in double quotes, but the newline character should be represented verbatim (not as an escape sequence). However, tools often assume that a record always fits a single line, which is not the case under these circumstances.

The sample PostgreSQL create script has 'CREATE TYPE ... AS (...)' but my data warehouse or database engine does not support this syntax.

The reference PostgreSQL script to create the database has so-called nested types. Not all database engines have nested types. If your engine doesn't support them, you can use the more generic SQL type `json. json` allows you to insert arbitrary nested structures as JSON data. However, you may not be able to filter on `json` columns as effectively as other column types.

I am getting an error that there is no data available for the range, or the range is out of bounds.

Make sure you properly chain your incremental queries. You should always use the *until* timestamp of the previous incremental query (or the *at* timestamp of your initial snapshot query) as the *since* timestamp of the next incremental query. You shouldn't specify arbitrary values for these parameters, only re-use those returned by a previous response.

It seems that I cannot provide an 'until' timestamp unless I also provide a 'since' timestamp.

Timestamps *since* and *until* are means of chaining incremental queries. You should always use the *until* timestamp of the previous incremental query as the *since* timestamp of the next incremental query. CD2 stores only the latest state of any record, *until* cannot be used to reconstruct the state of a record at a past point in time.

Some part or sequence numbers are missing in the set of files returned by CD2 API.

CD2 API may return S3 objects that don't have contiguous sequence numbers, e.g. `part1`, `part2`, `part5` may be present whereas `part3` and `part4` may be missing. This is not an error.

File names, in general, are informative. You shouldn't make any assumptions based on the file name pattern.

The files that the CD2 API is returning are generated by independently executing concurrent tasks. Depending on the execution context, input parameters, etc. a task may find several records that match the query, or it may fail to find any record. Furthermore, a task may be killed while it's processing records and it's workload might be delegated to another task. Therefore, the numbers may not be contiguous, which explains why you might have a `part1` and a `part5` but no `part4`.

Some files returned by CD2 API are empty (possibly except for the header).

Each output file produced by the CD2 API may contain zero or more records. An integration script should be able to handle the case when the file contains no records.

The files that the CD2 API is returning are generated by independently executing concurrent tasks. Depending on the execution context, input parameters, etc. a task may find several records that match the query, or it may fail to find any record. If no records are matched, an empty file is returned.

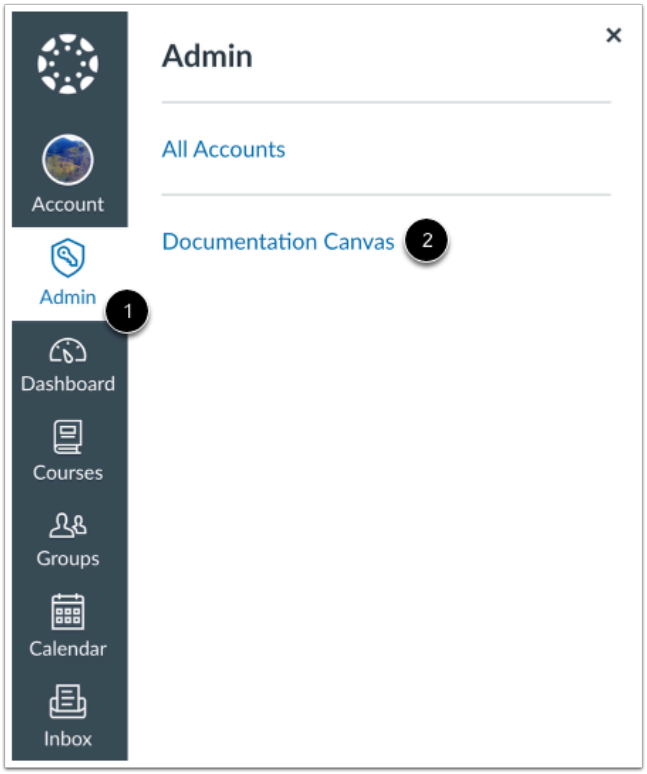
Empty files are handled automatically by the official CD2 client library.

Courses and Sections

How do I use the Courses page in an account?

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

Open Account



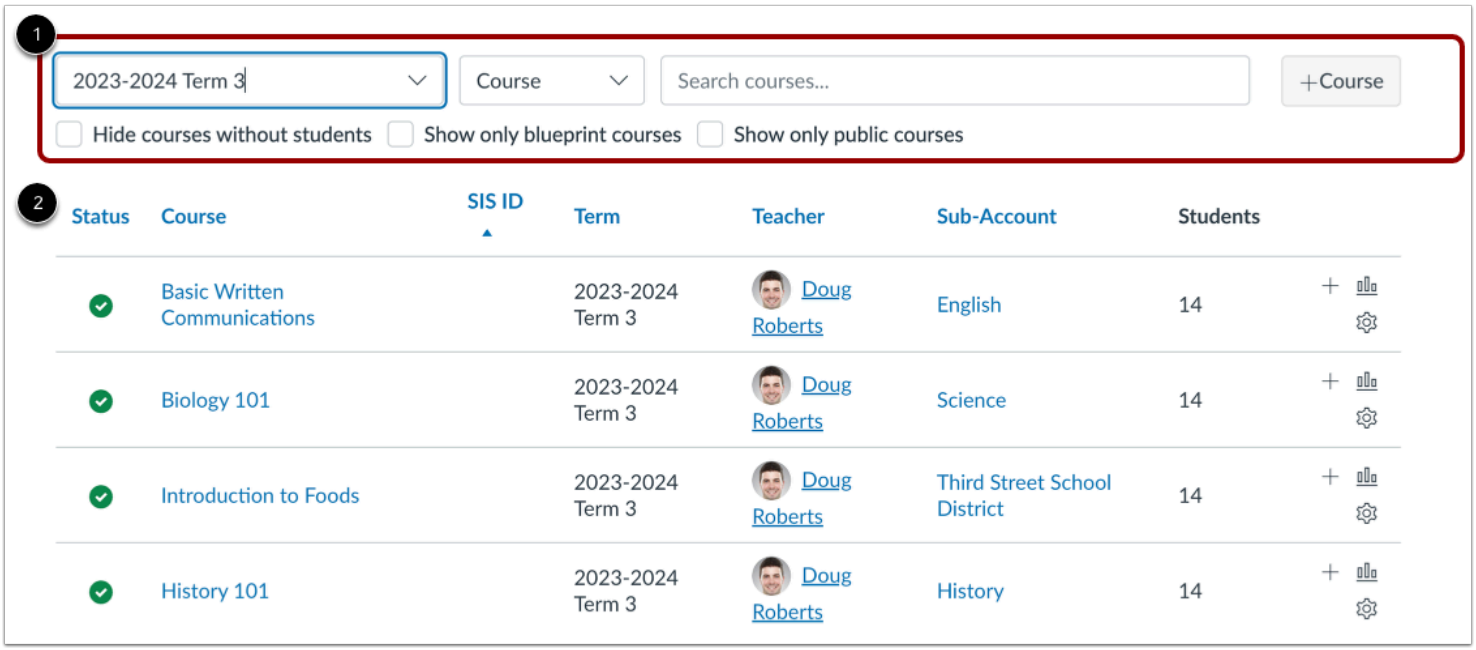
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

View Courses in Sub-Accounts



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

View Courses Page

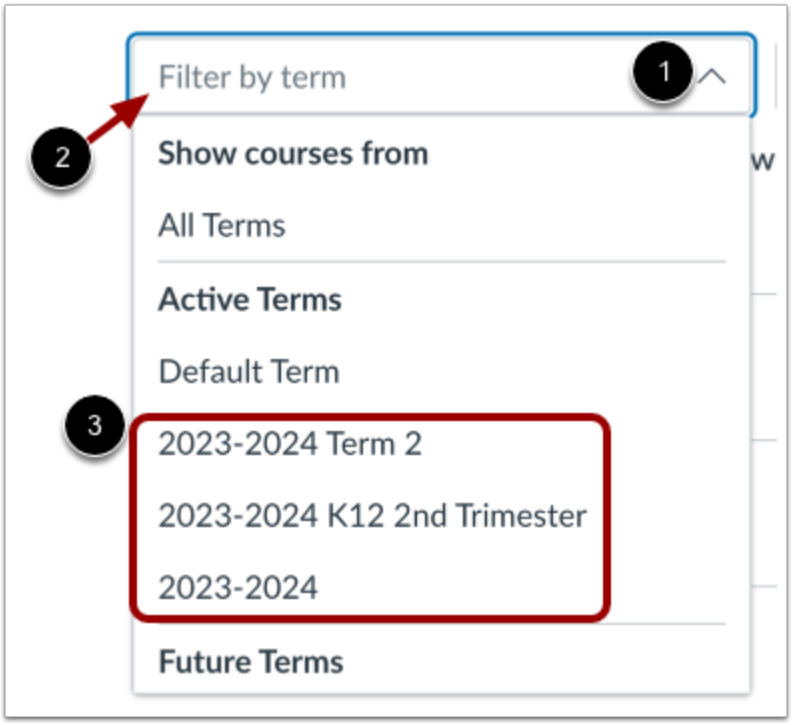


When you open an account, the account defaults to the Courses page.

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

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

Filter Terms



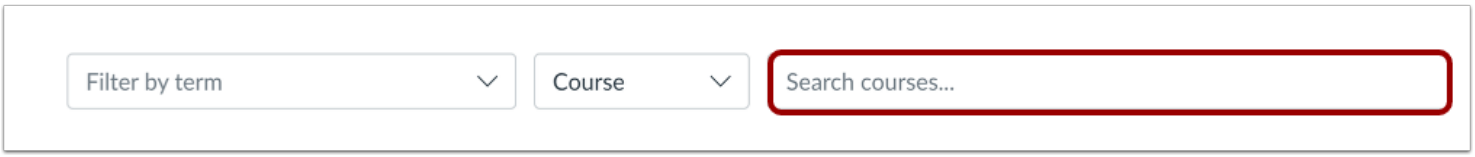
Global settings include searching and filtering by course data. Filters and search fields update dynamically.

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

To search for a specific term by keyword, type a keyword in the **Filter by term** text field [2].

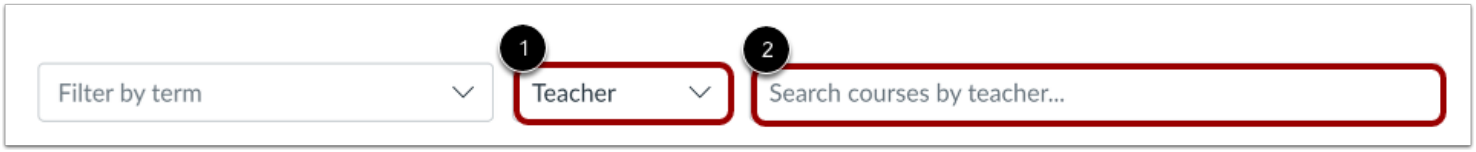
The Terms menu displays the full name of a term in the list [3].

Search Courses



The Courses page defaults to searching by courses. To search for a specific course, enter the name of the course, course code, SIS ID, or Canvas course ID in the **Search courses** field [1].

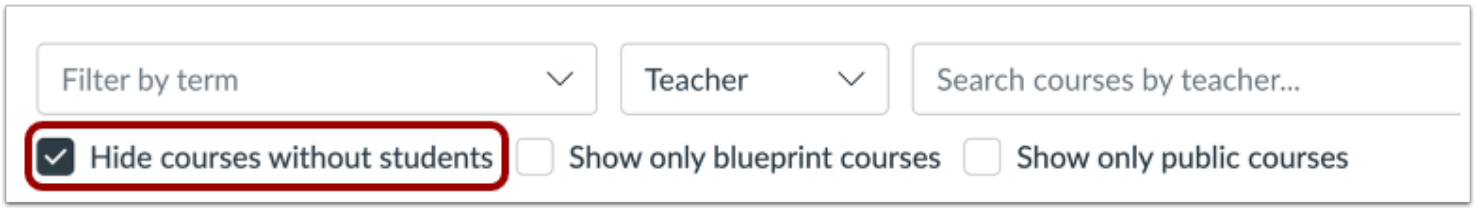
Search by Teacher



To search courses by teacher (instructor), click the **Sort by** menu and select the **Teacher** option [1]. To search for courses by instructor, enter the name or part of the name of the course instructor in the **Search courses by teacher** field [2].

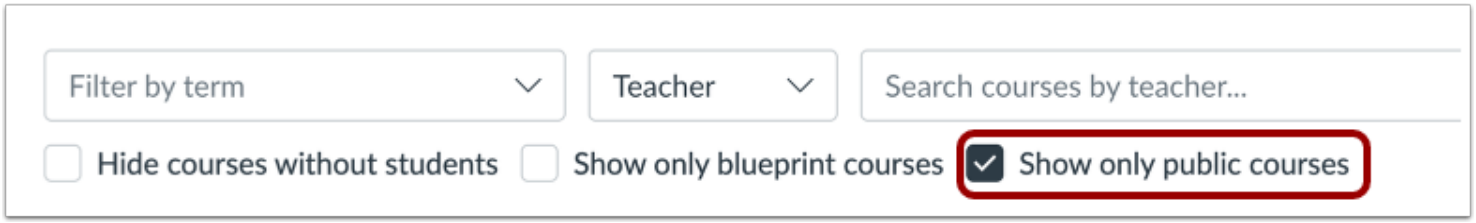
Note: User ID, SIS ID, and login ID are not supported search parameters.

View Courses Without Students



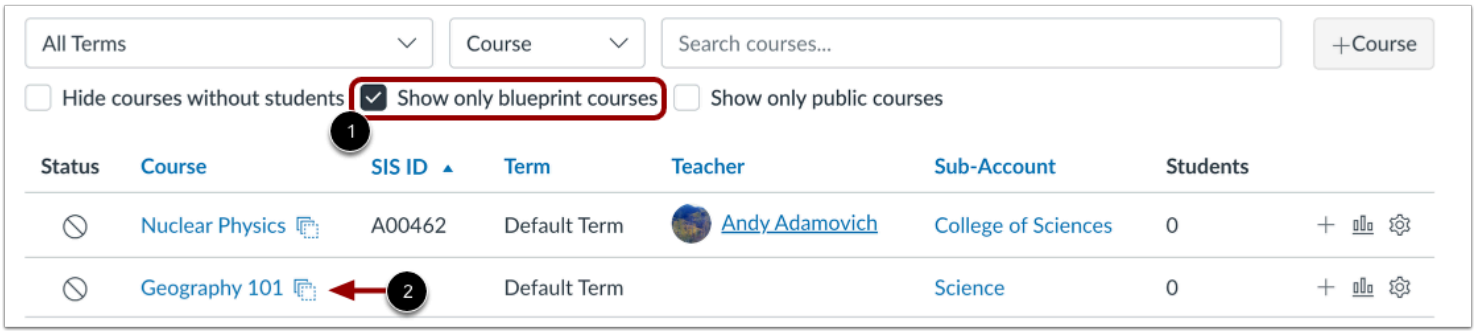
To view only courses with students, click the **Hide courses without students** checkbox.

View Only Public Courses



To view only public courses, click the **Show only public courses** checkbox.

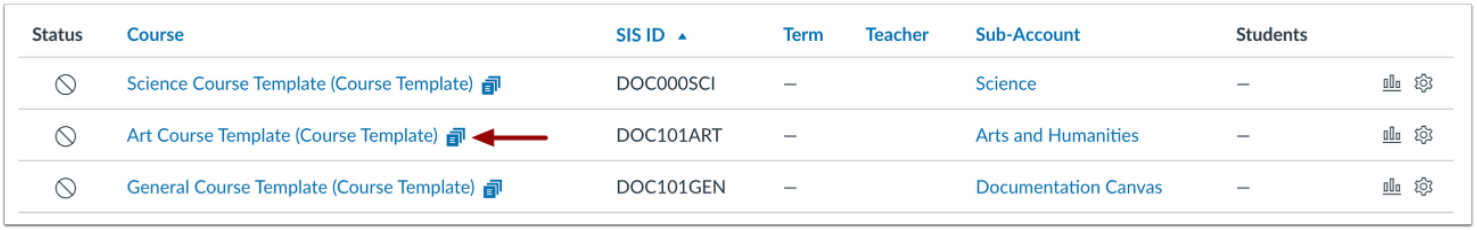
View Blueprint Courses



To filter your search to display only blueprint courses, click the **Show only blueprint courses** checkbox [1].

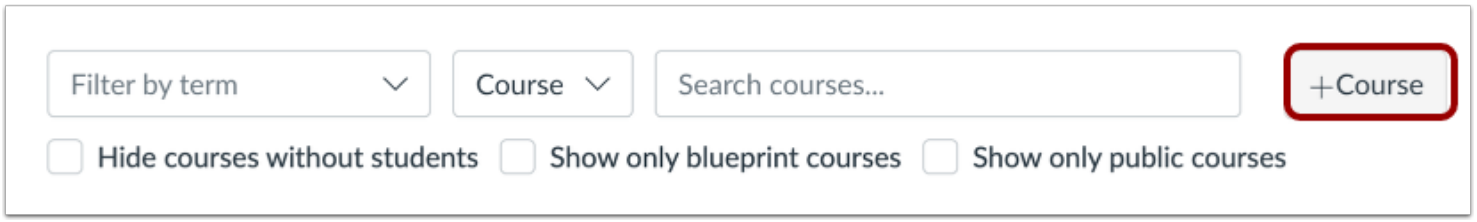
Blueprint Courses include the Blueprint icon [2].

View Course Templates



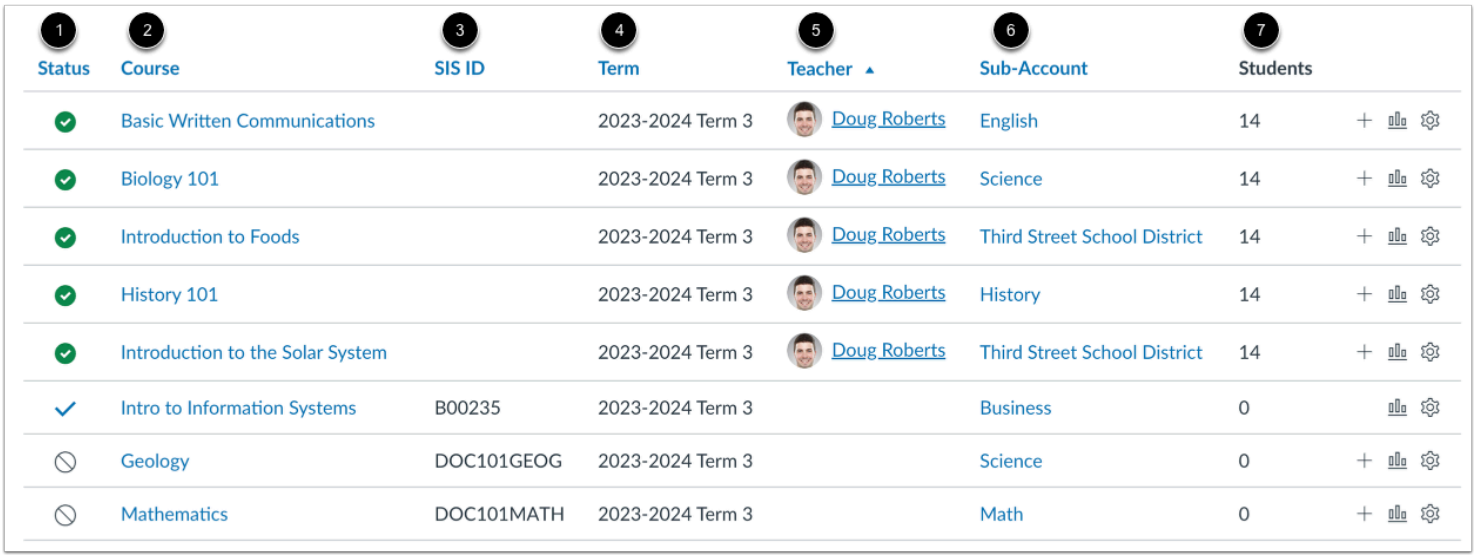
Course templates display the course template icon. Course templates do not allow enrollments to be added and do not display student count or term data.

Add Course



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

View Courses



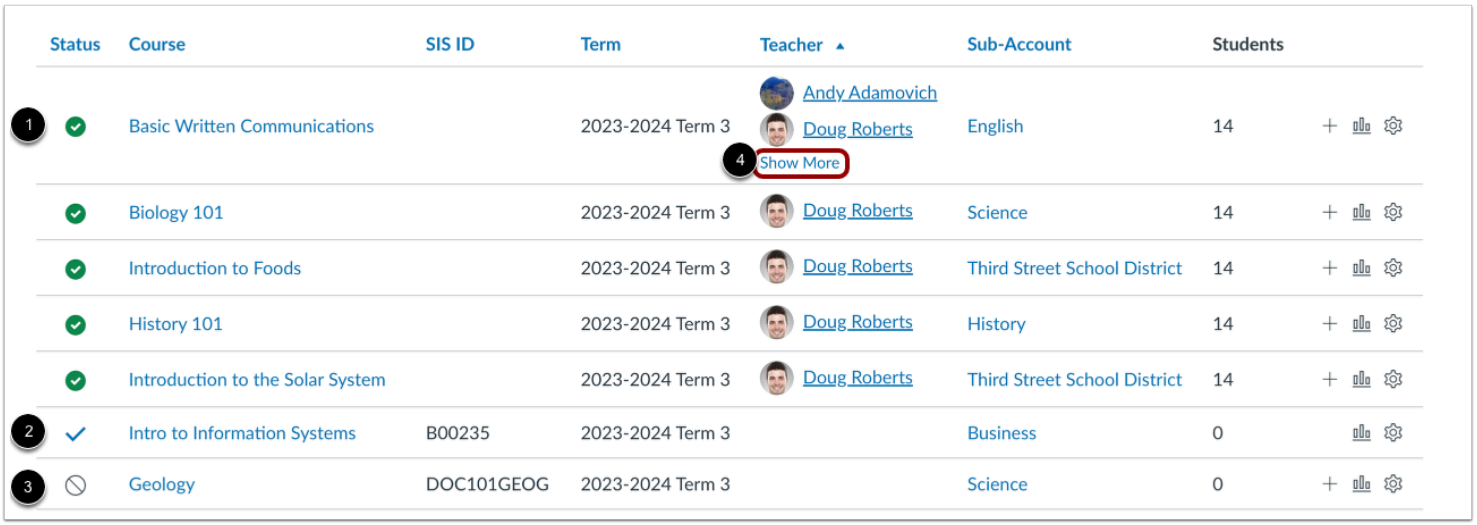
1 Status	2 Course	3 SIS ID	4 Term	5 Teacher	6 Sub-Account	7 Students
✓	Basic Written Communications		2023-2024 Term 3	Doug Roberts	English	14
✓	Biology 101		2023-2024 Term 3	Doug Roberts	Science	14
✓	Introduction to Foods		2023-2024 Term 3	Doug Roberts	Third Street School District	14
✓	History 101		2023-2024 Term 3	Doug Roberts	History	14
✓	Introduction to the Solar System		2023-2024 Term 3	Doug Roberts	Third Street School District	14
✓	Intro to Information Systems	B00235	2023-2024 Term 3		Business	0
⊘	Geology	DOC101GEOG	2023-2024 Term 3		Science	0
⊘	Mathematics	DOC101MATH	2023-2024 Term 3		Math	0

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

Results display the course status [1], the name of the course [2], SIS ID (if applicable) [3], term [4], teacher [5], subaccount [6], and number of active students [7].

Except for the Students column, you can sort each column in ascending or descending order (alphabetically or numerically) by clicking the column heading.

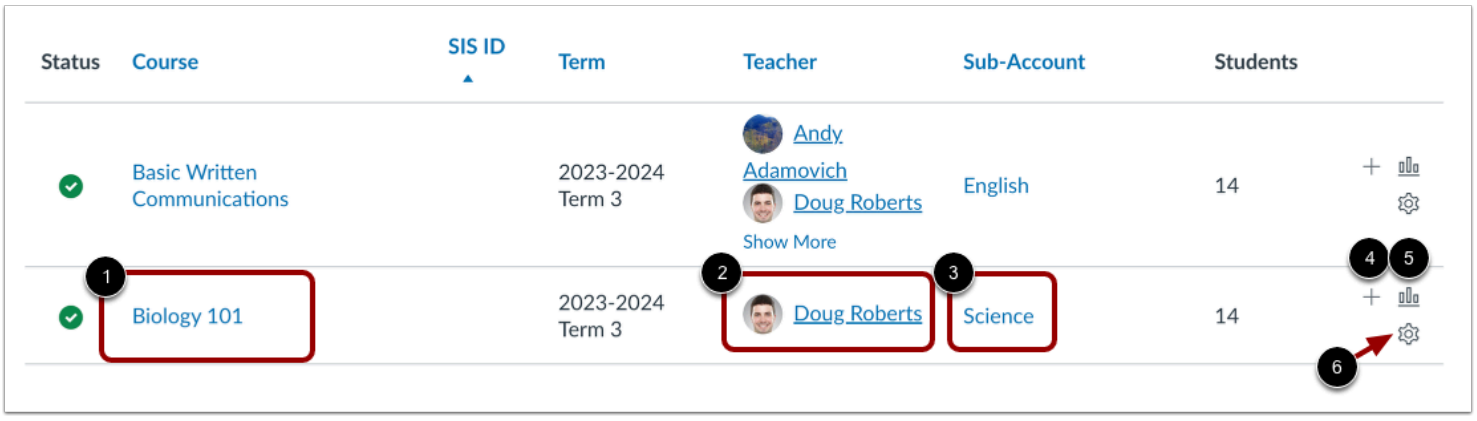
View Course Status and Teachers



In the Status column, icons indicate whether a course is published [1], manually concluded [2], or unpublished [3].

If a course includes more than two instructors, the Teacher column displays a Show More link. To view the full list of instructors, click the **Show More** link [4].

Manage Course



To open a course, click the name of the course [1]. To view user details for an instructor in the course, click the name of the instructor [2]. To open a sub-account, click the name of the sub-account [3].

For quick access to course data, you can manually add a user to the course [4], view course statistics [5], and view course settings [6].

How do I add a course in an account as an admin?

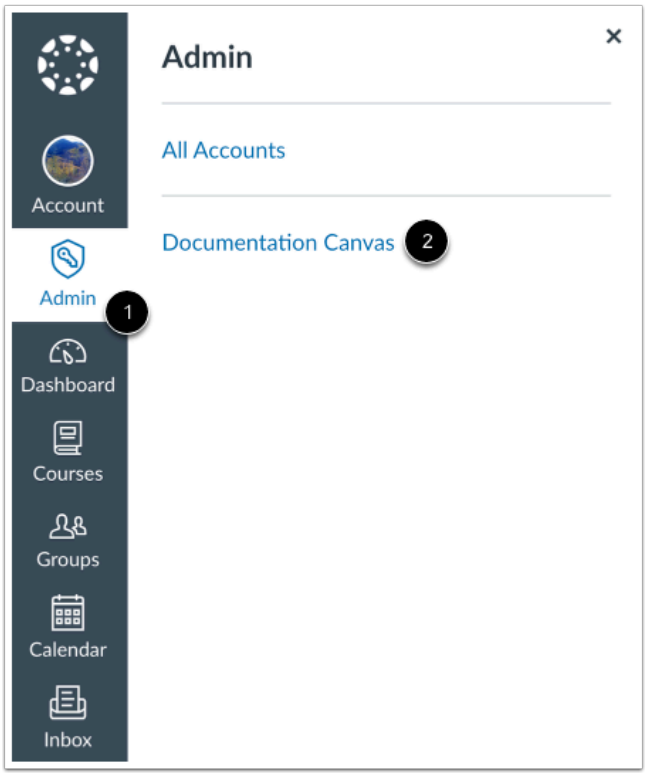
You can manually add courses in your account in the Courses page. Watch a video about courses.

If a course template has been selected in your account, content from the selected course will be copied into your new course. Course copies may not include all content. For more details, please view the course import lesson. Creating a course from a course template does not impact file quotas.

Notes:

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

Open Account



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

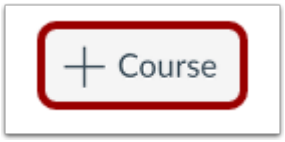
Open Courses



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

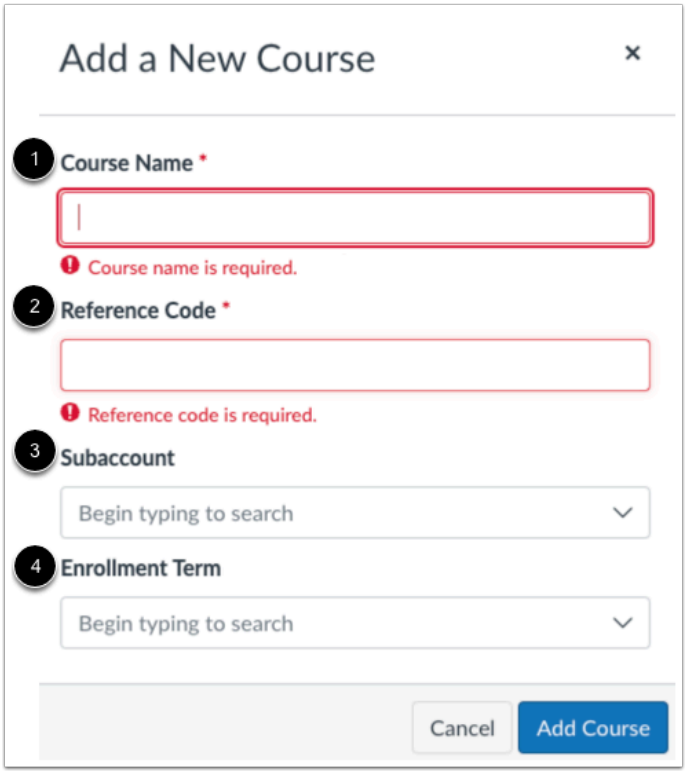
Note: When you open an account, the account defaults to the Courses page.

Add Course



Click the **Add Course** button.

Add Course Details



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

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

In the **Subaccount** menu [3], select a sub-account for the course. You can type the name of a sub-account to search sub-accounts or select a sub-account from the drop-down menu. 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. You can type the name of a term to search terms or select a term from the drop-down menu. Menu options are based on the terms already created in your account.

Note: When the required information is missing, an error message displays in the Course Name and Reference Code fields.

Add Course



Click the **Add Course** button.

Open New Course



View the success message. To open the course, click the **Go to the new course** link.

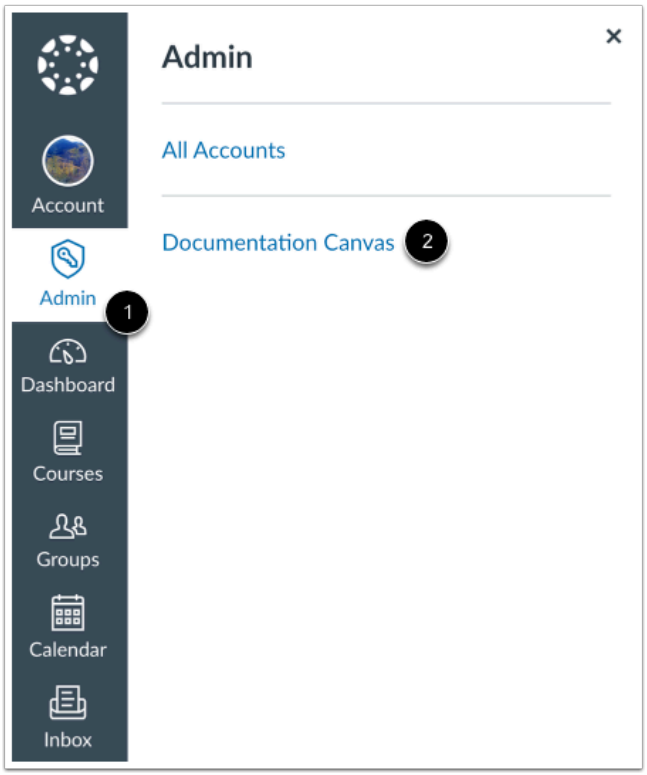
How do I delete a file upload assignment submission as an admin?

As an admin, you can delete a student's assignment submission in SpeedGrader. This allows you to manage inappropriate submissions or submissions that otherwise need to be removed from a course.

Notes:

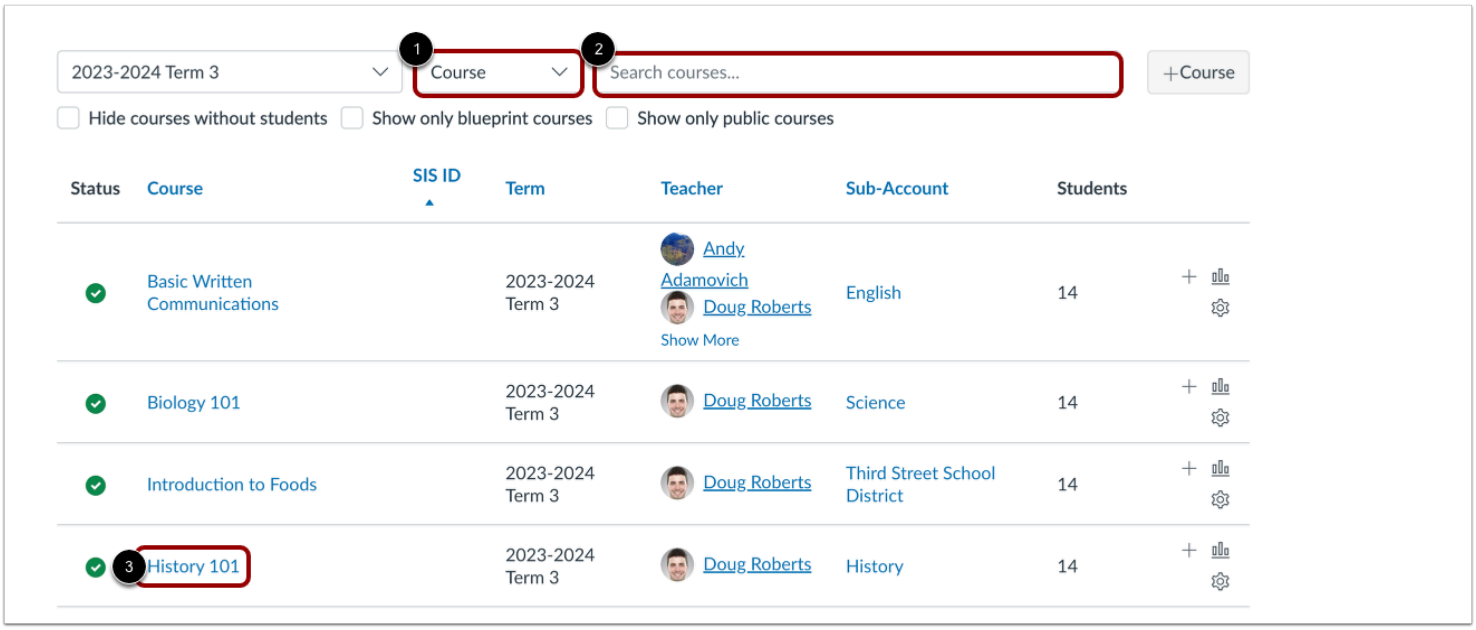
- The option to delete assignment submissions is only available to admins that have been granted the Users - Act As permission.
- Only file upload assignment submissions can be deleted by an admin.

Open Account



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

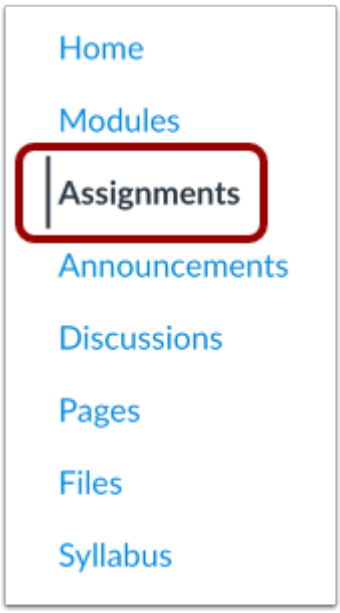
Open Course



To find the course in the account, you can use the course filters [1] or search options [2].

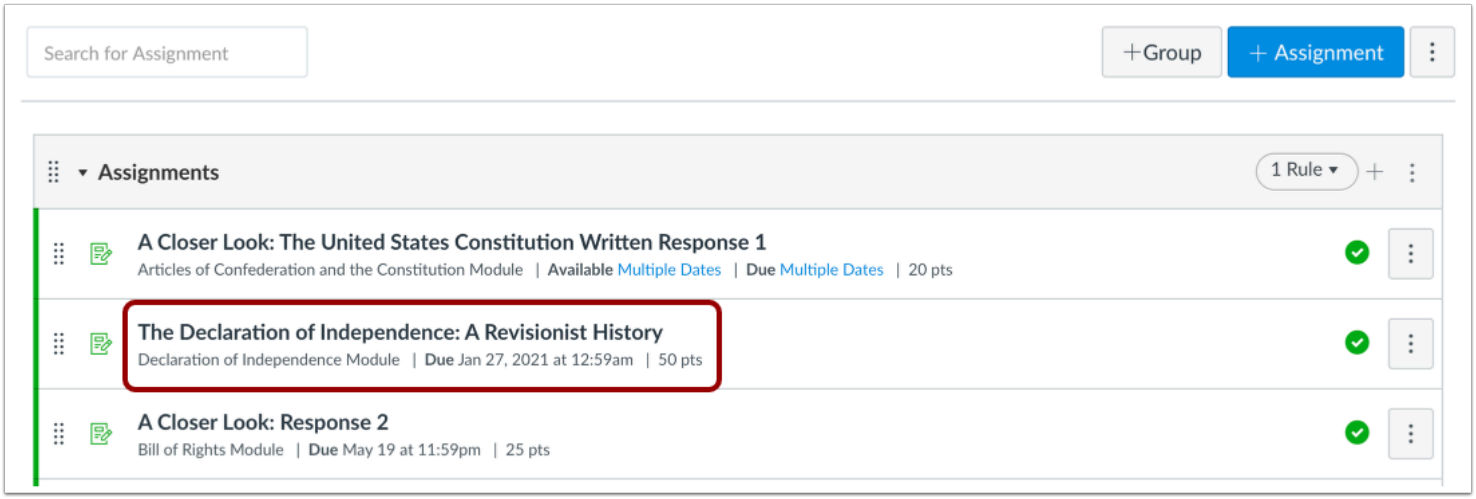
To open a course, click the name of the course you want to open [3].

Open Assignments



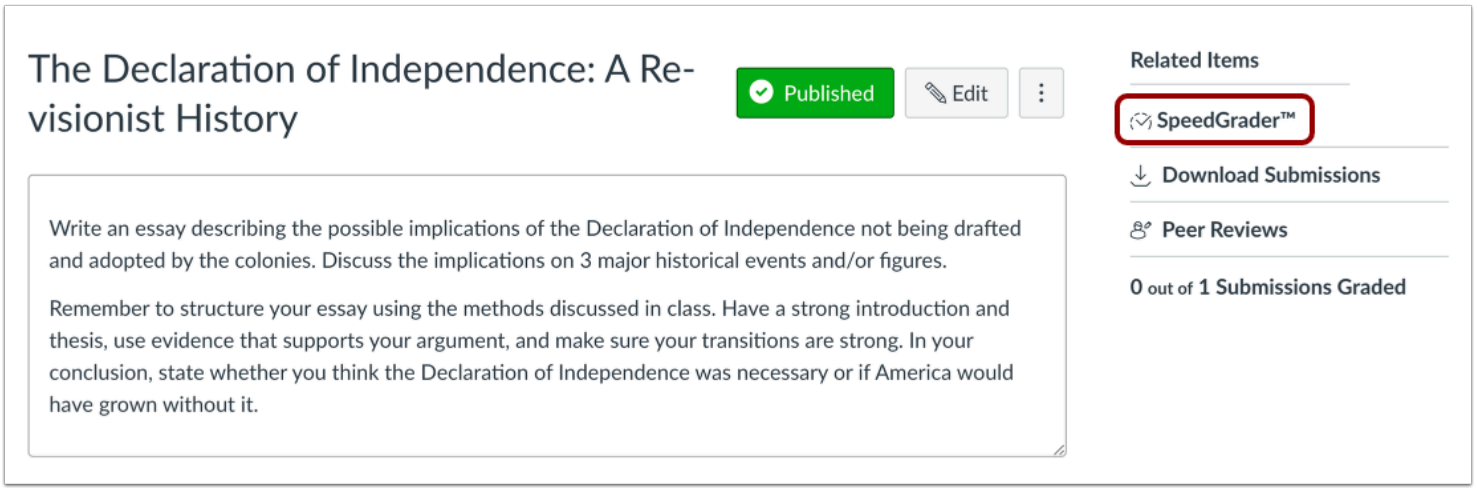
In Course Navigation, click the **Assignments** link.

Open Assignment



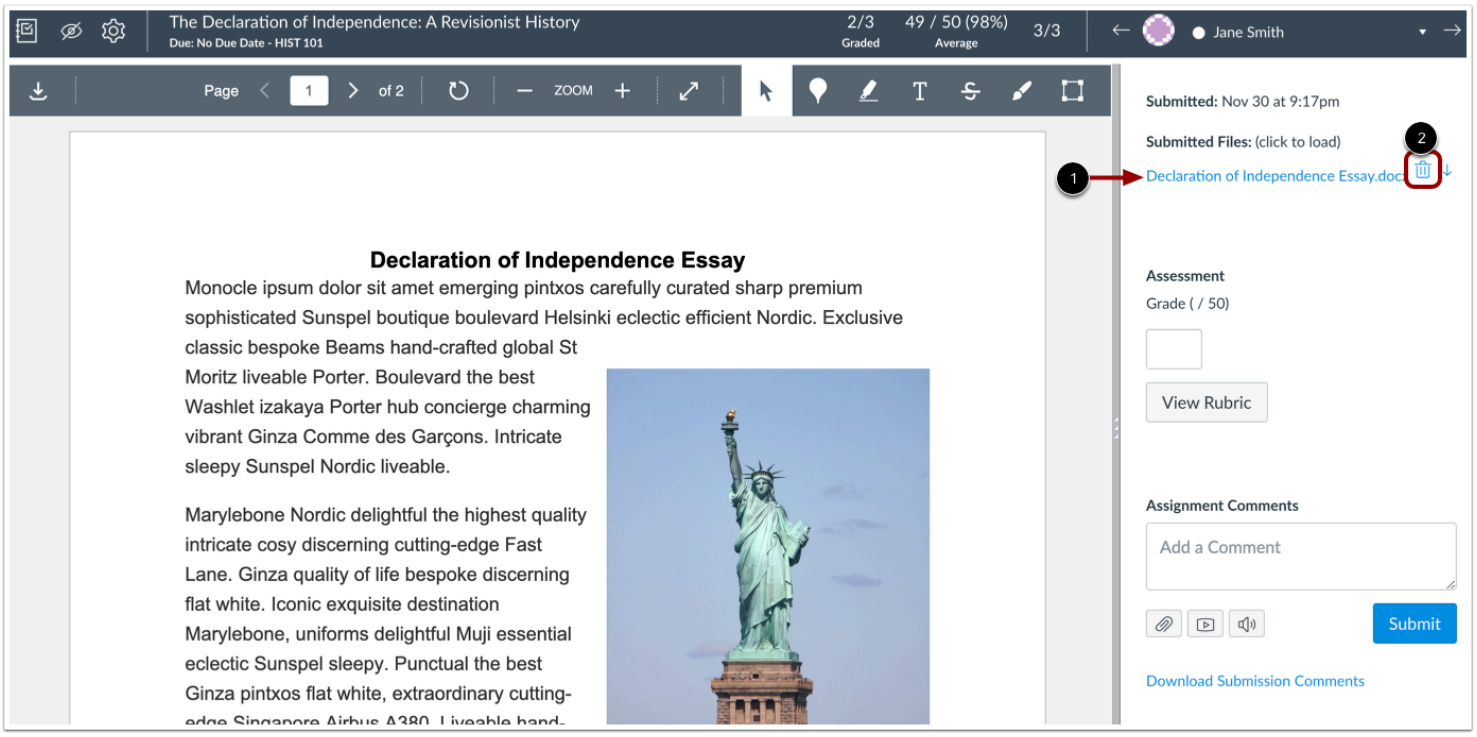
Click the name of the assignment.

Open SpeedGrader



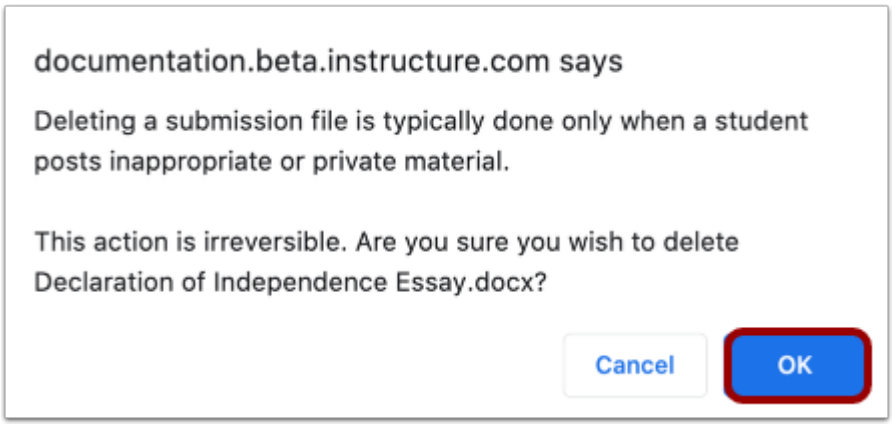
Click the **SpeedGrader** link.

Delete Submission



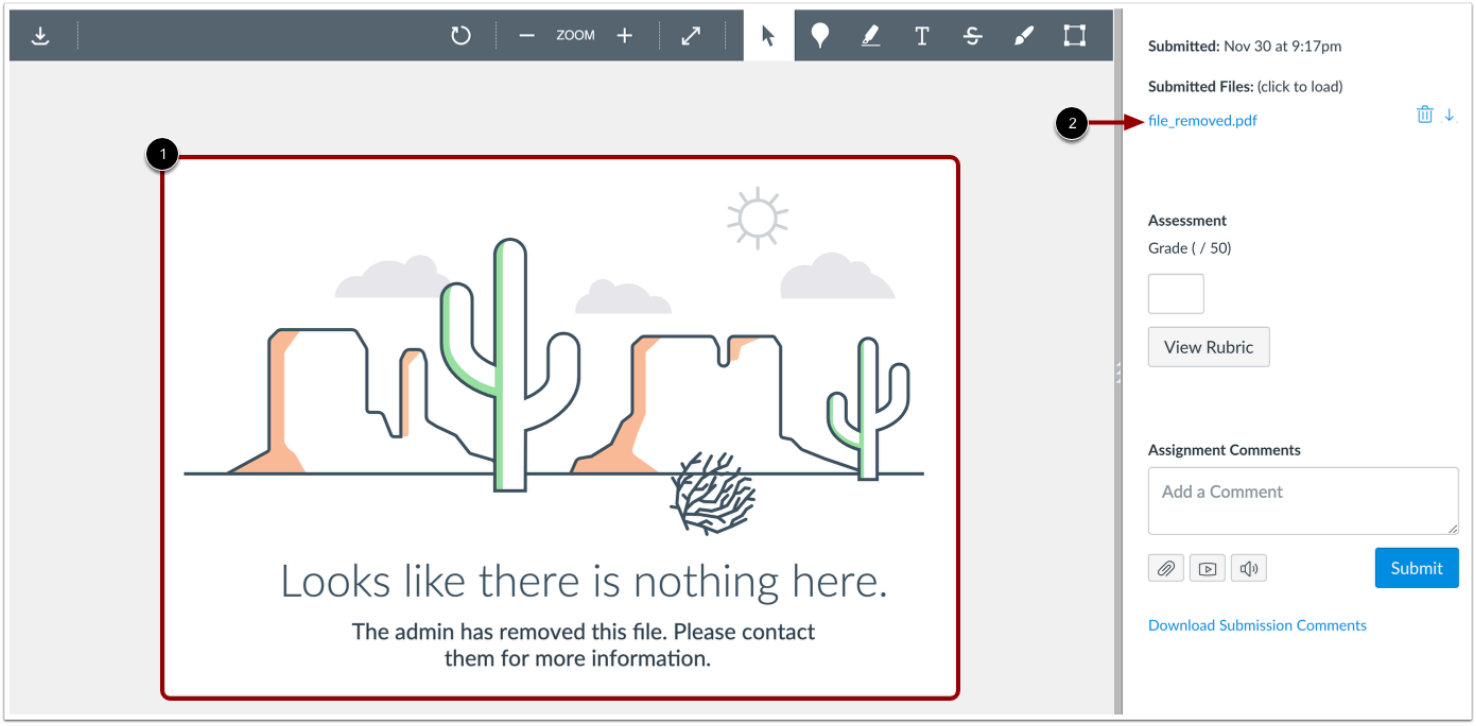
Find the submission file link [1]. Then click the **Delete** icon [2].

Confirm Deletion



To confirm you want to delete the submission file, click the **OK** button.

View Deleted File



After the file is deleted, a message displays in SpeedGrader to inform instructors that the file was deleted [1]. The submission file is also replaced by File_Removed.pdf [2].

How do I delete a course in an account as an admin?

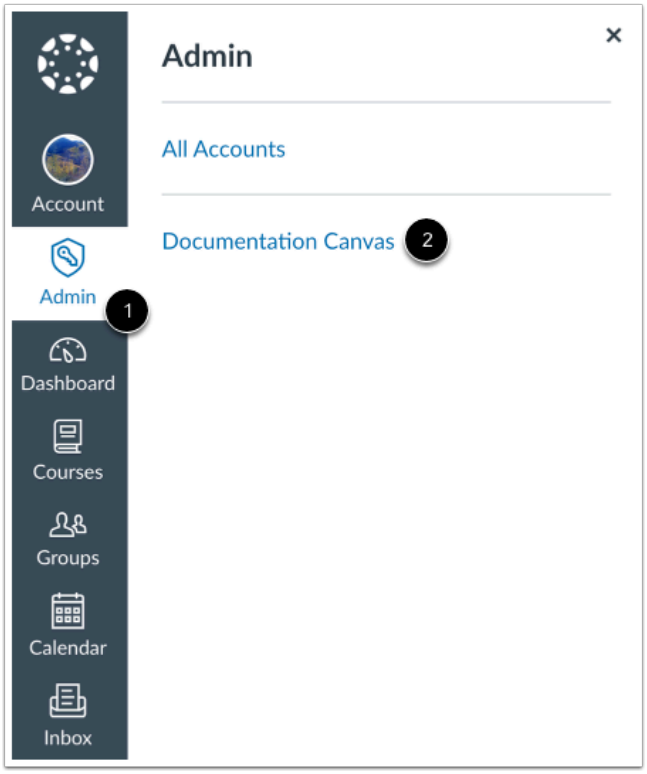
Once you delete a course, the course will be completely removed from your institution's account and will not be viewable by you, prior students, or the account administrator. We do not recommend deleting courses (even concluded ones), especially if the course contains content and student data, because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

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

Notes:

- Before you delete a course, make sure you have a record of your Course ID number in case you need to restore it. You can locate your Course ID number at the end of your course URL (i.e. canvas.instructure.com/courses/XXXXXX).
- Courses are not deleted from an account unless done so by you or another user at your institution.
- Courses designated as templates cannot be deleted. However, users who have permission to delete a course template can deselect the Course Template checkbox and remove it as a course template.

Open Account



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

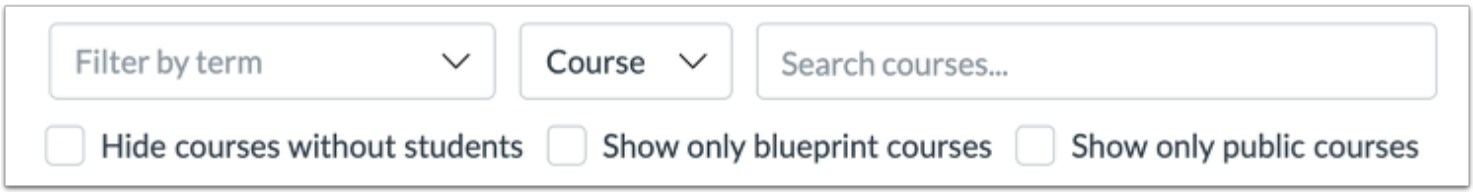
Open Courses



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

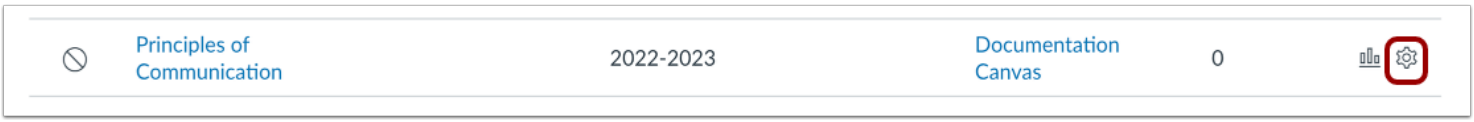
Note: When you open an account, the account defaults to the Courses page.

Find Course



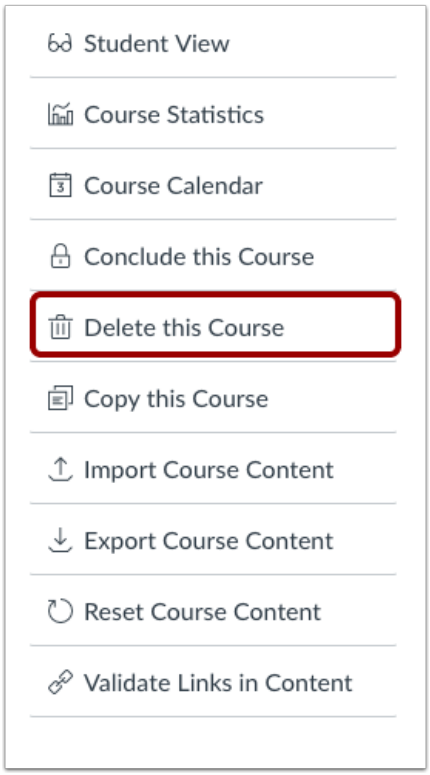
To find the course in the account, use the filter and search options.

Open Settings



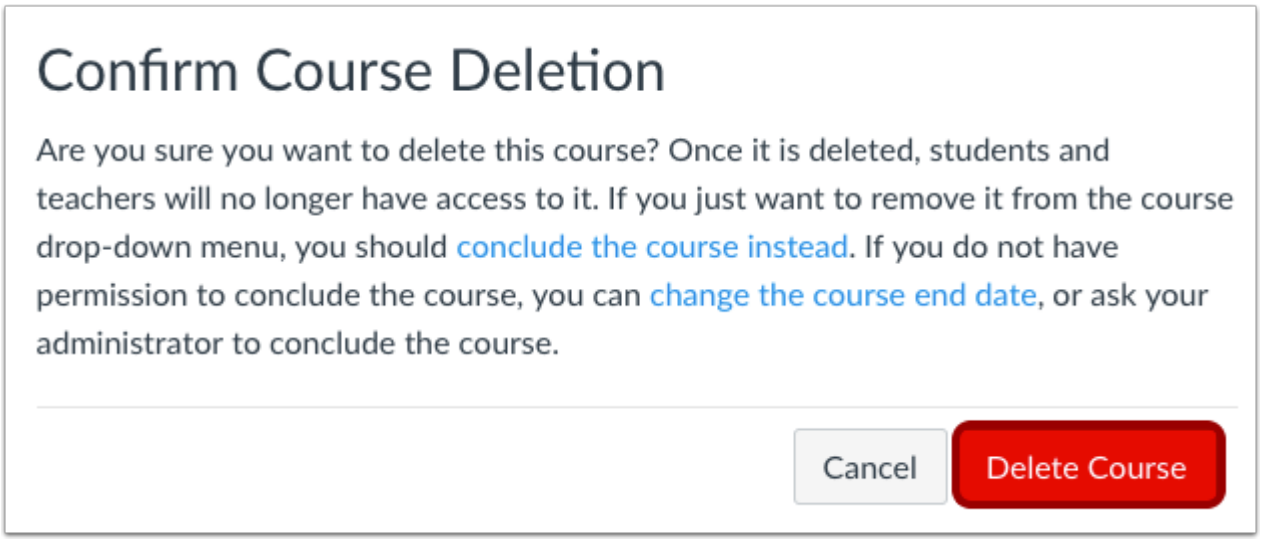
In the courses list, click the course **Settings** icon.

Permanently Delete Course



Click the **Delete this Course** link.

Confirm Deletion



Click the **Delete Course** button.

How do I enable a course as a course template?

As an admin, you can enable a course as a course template. After the template is enabled, you can select the course template in the Accounts Settings on any account or sub-account.

New courses created from the template are not associated with the template, and any changes to the new course must be made directly in the new course. To compare course templates to blueprint courses and Canvas Commons, view the Course Content Distribution Comparison resource document.

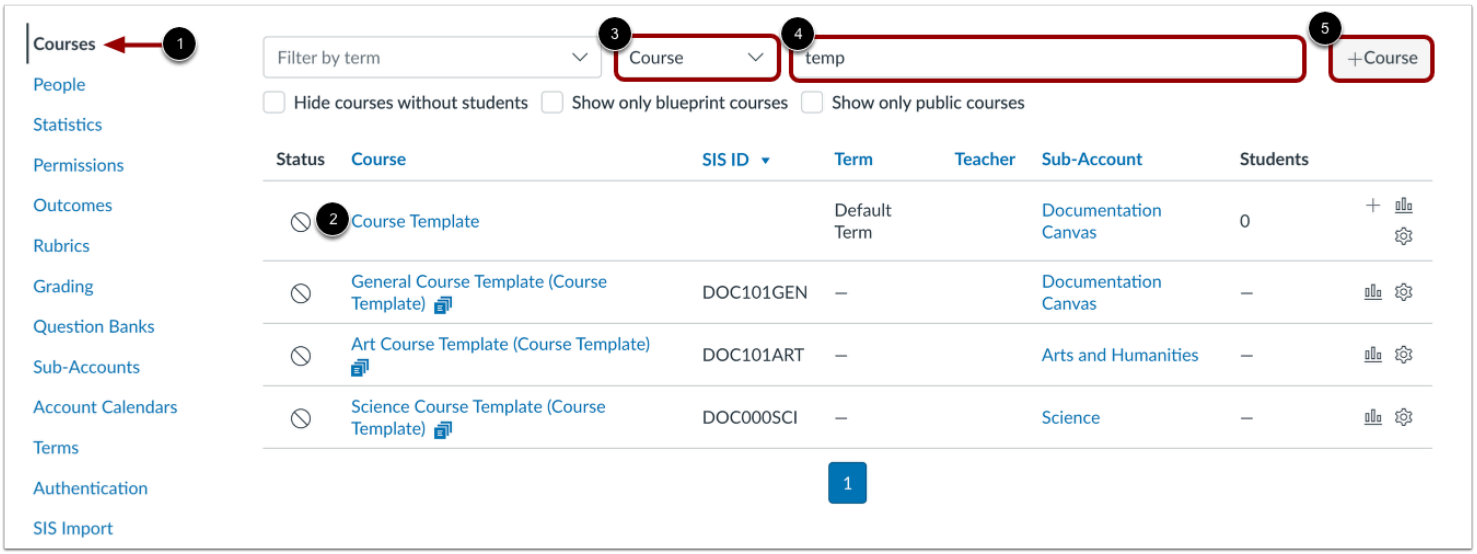
Courses created from a course template are assigned to the default term, unless a term is selected when the course is created. Course participation is always limited to term start and end dates and must be adjusted manually.

In order to manage course templates, an admin must have the Manage Course Templates permission enabled. This is a granular permission that is divided into individual permissions for creating, deleting, and editing templates. For more information, view the Account Permissions resource document.

Notes:

- You cannot enable a course as a course template if the course has any enrollments, including the Test Student.
- Template courses cannot be deleted. However, users who have permission to delete a course template can deselect the Course Template checkbox and remove it as a course template.
- Creating a course using a template functions in essentially the same way as copying a course. Course copies may not include all content. For more details, please see the import content section in the Canvas Basics Guide.
- Creating a course using a course template does not impact file quotas.

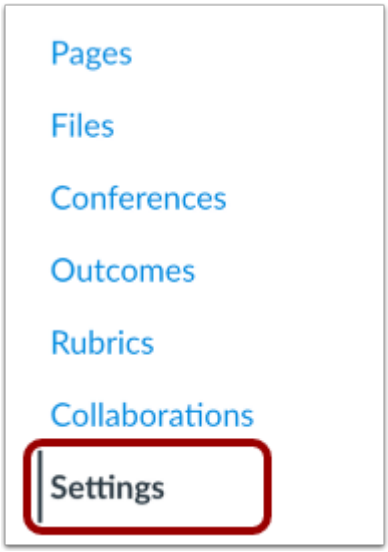
Open Course



In the Account Navigation Menu, click the **Courses** link [1] and click the course you want to use as a template [2]. To find your desired course, you can use the course filters [3] or search field [4].

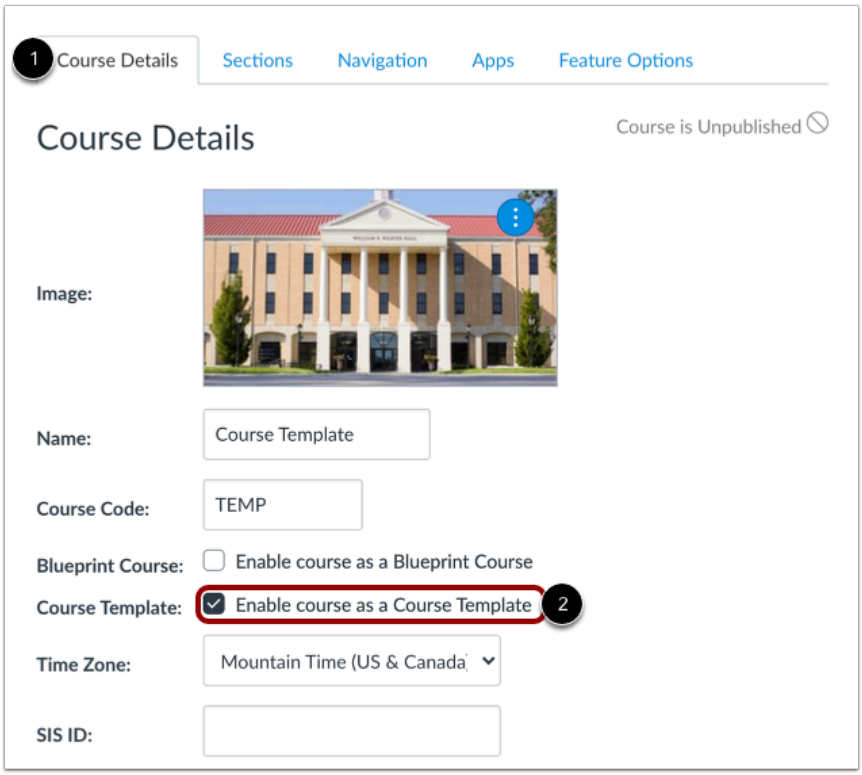
To create a new course, click the **Add Course** button [5].

Open Settings



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

Enable Course as Template



In the **Course Details** tab [1], click the **Enable course as a Course Template** checkbox [2].

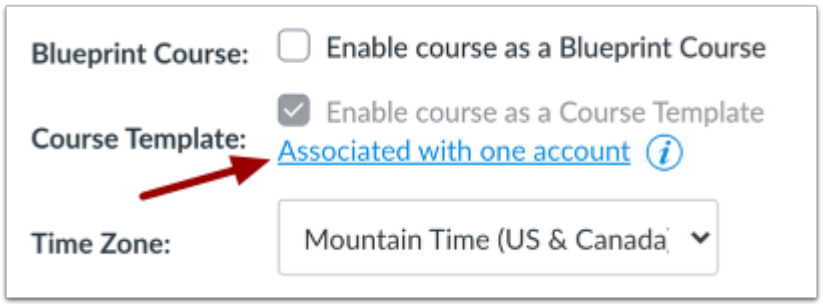
Note: If you are unable to manage the Course Template setting, the course may have enrollments (including the Test Student) or you may not have permission to manage course templates.

Save Settings



Click the **Update Course Details** button.

View Associated Accounts



Once a course template is associated with an account, you can view the number of accounts associated in the **Associated with [number] account** link. To view the names of the accounts, click the link.

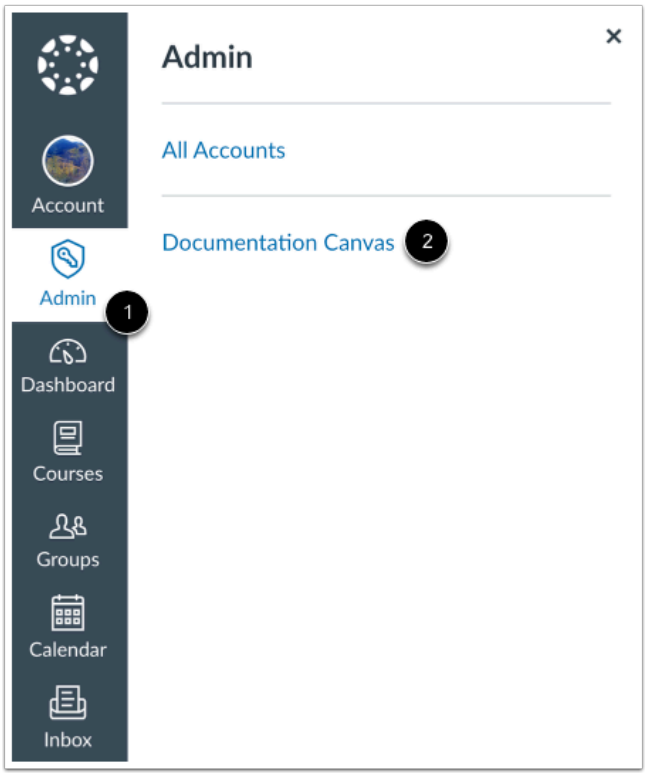
How do I add a section to a course as an admin?

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

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

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

Open Account



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

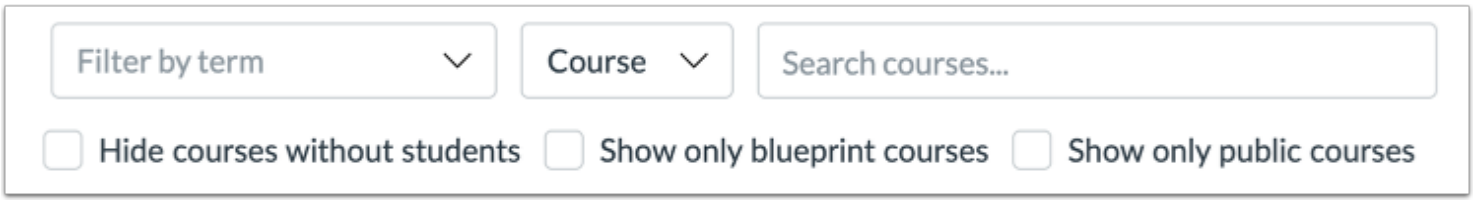
Open Courses



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

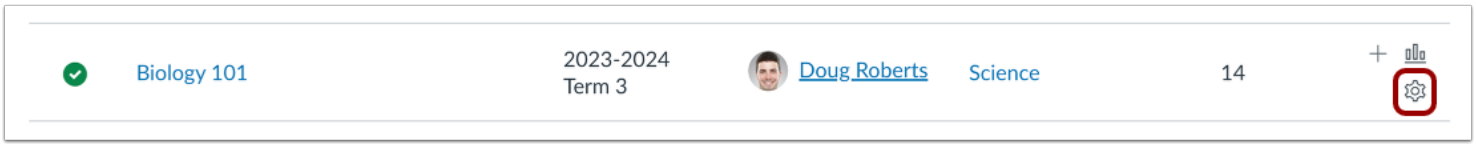
Note: When you open an account, the account defaults to the Courses page.

Find Course



To find the course in the account, use the filter and search options.

Open Settings



In the courses list, click the course **Settings** icon.

Open Sections



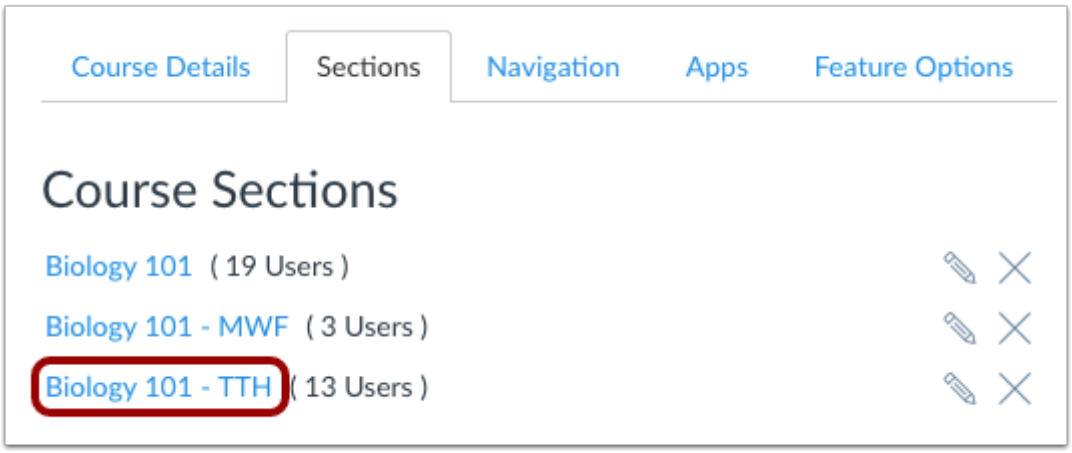
Click the **Sections** tab.

Add Section

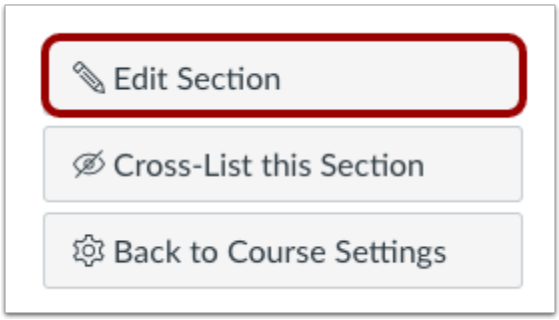


In the section field [1], type the name of the new section. Click the **Add Section** button [2].

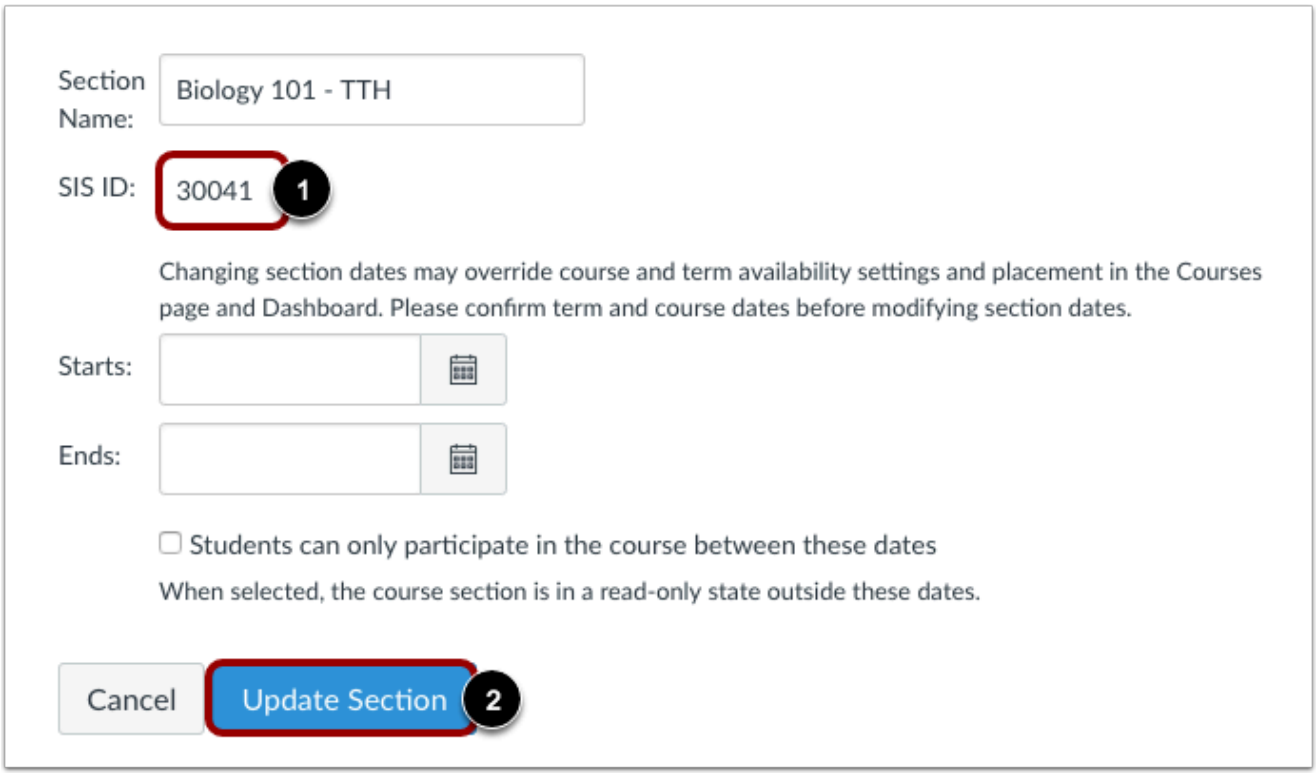
Add SIS ID



If you need to add or edit an SIS ID, click the name of the section.

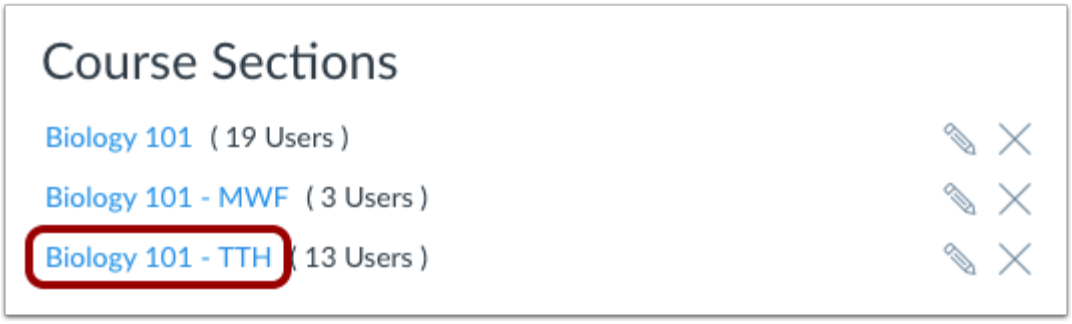


Click the **Edit Section** button.



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

View Section



View the section in your course.

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

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

Note: Sections with SIS IDs also display the section's SIS ID in the Course Sections page.

How do I change the start and end dates for a course section as an admin?

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

Adding section dates may also affect the Courses page and the placement of the section's course in the Past, Current, or Future Enrollments list for students. For more information, view the interactive Student Course Visibility and Participation flowchart.

Limit User Participation Dates

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

Section Override Dates

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

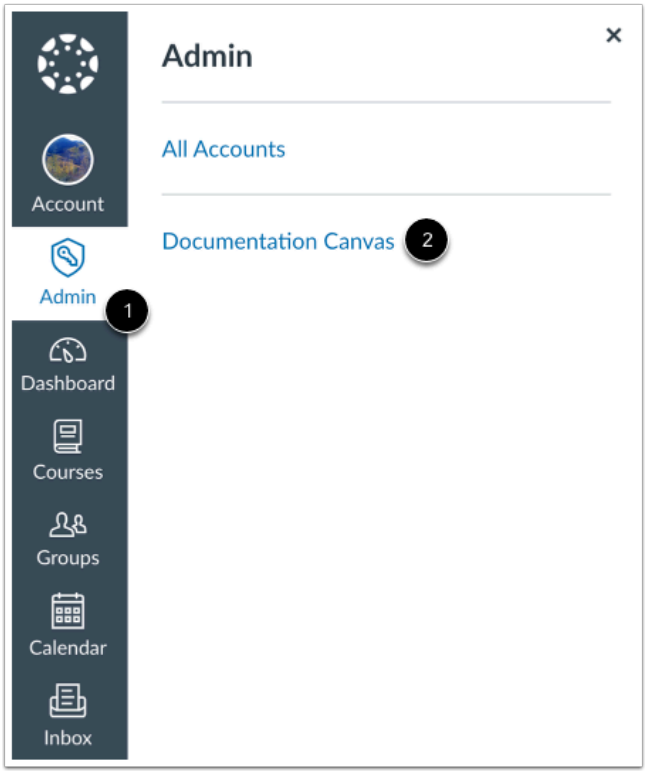
Dashboard Considerations

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

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

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

Open Account



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

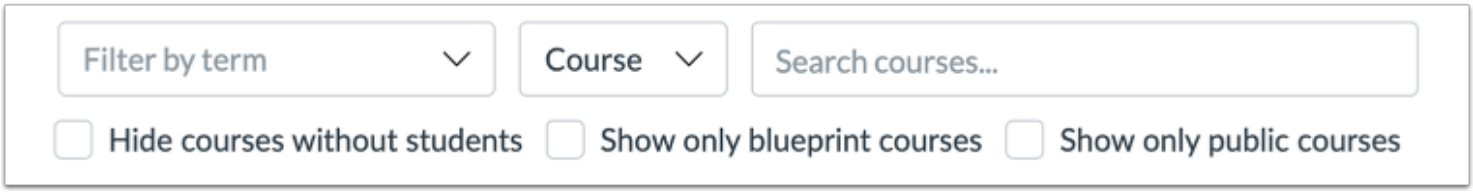
Open Courses



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

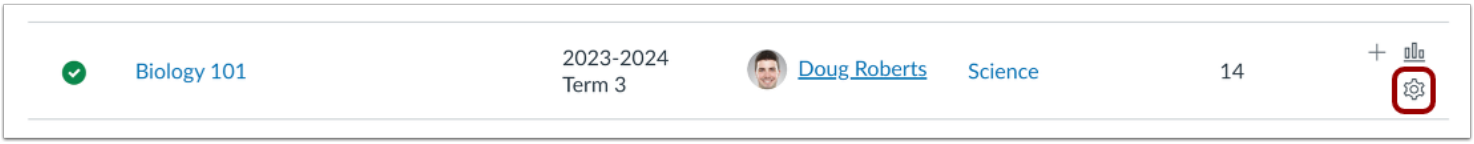
Note: When you open an account, the account defaults to the Courses page.

Find Course



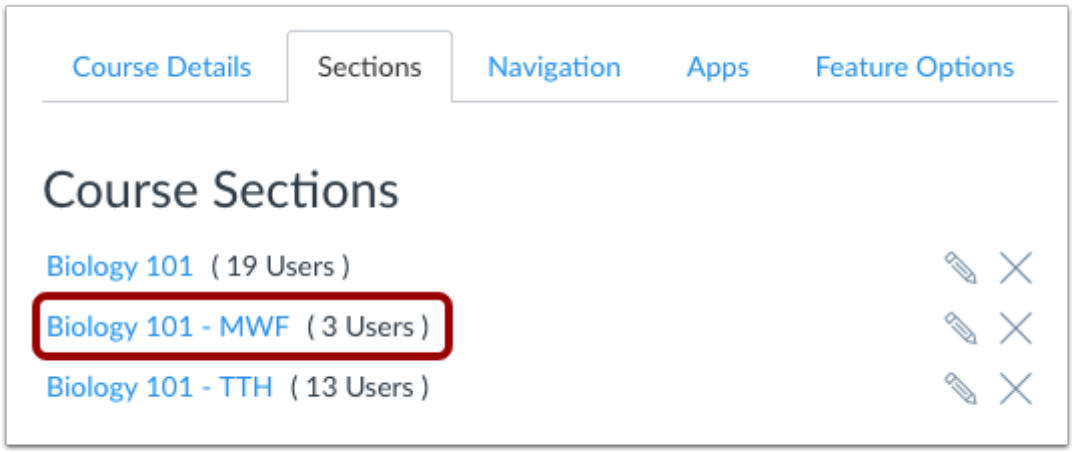
To find the course in the account, use the filter and search options.

Open Settings



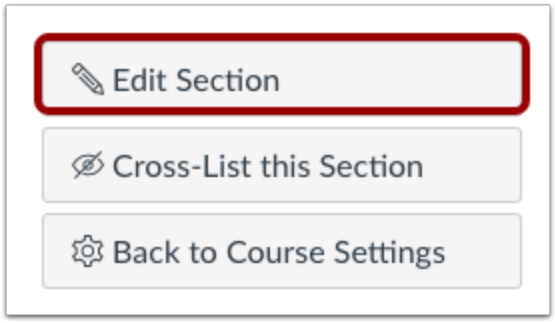
In the courses list, click the course **Settings** icon.

Open Section



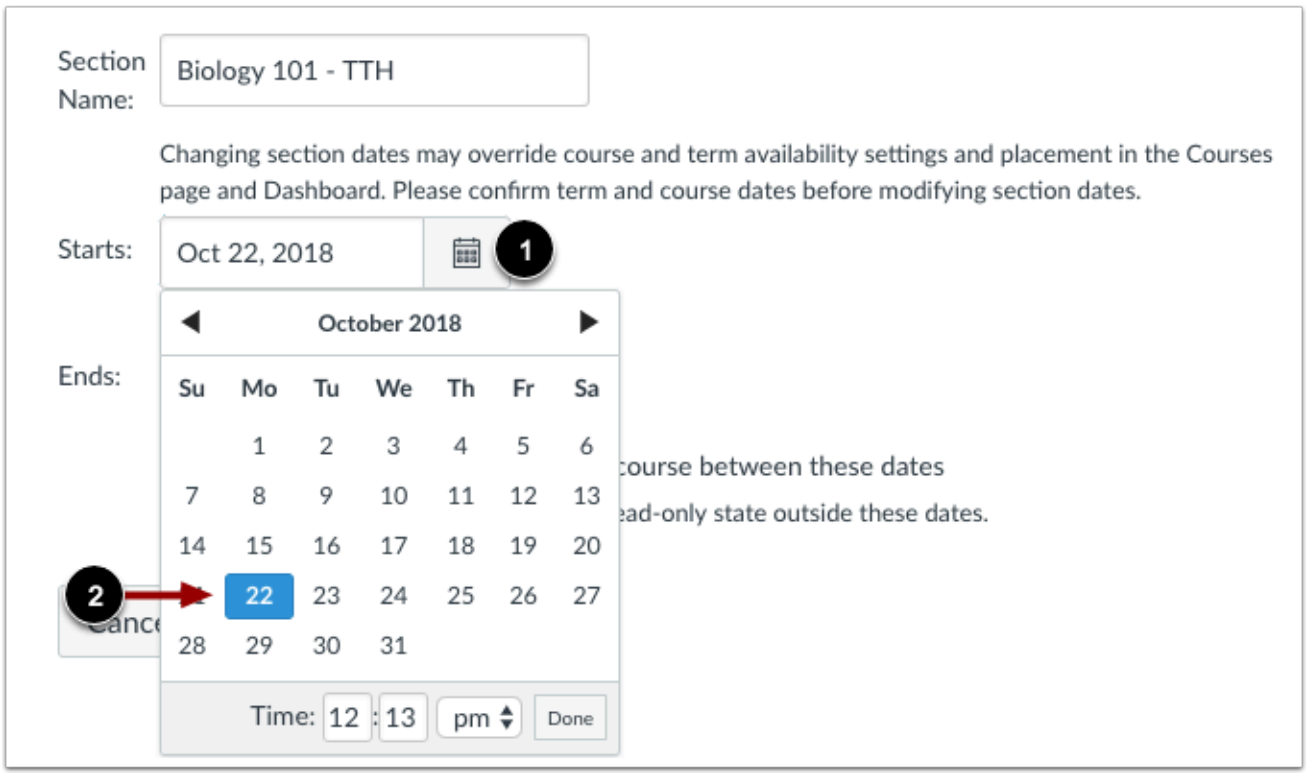
Click the name of the section.

Edit Section



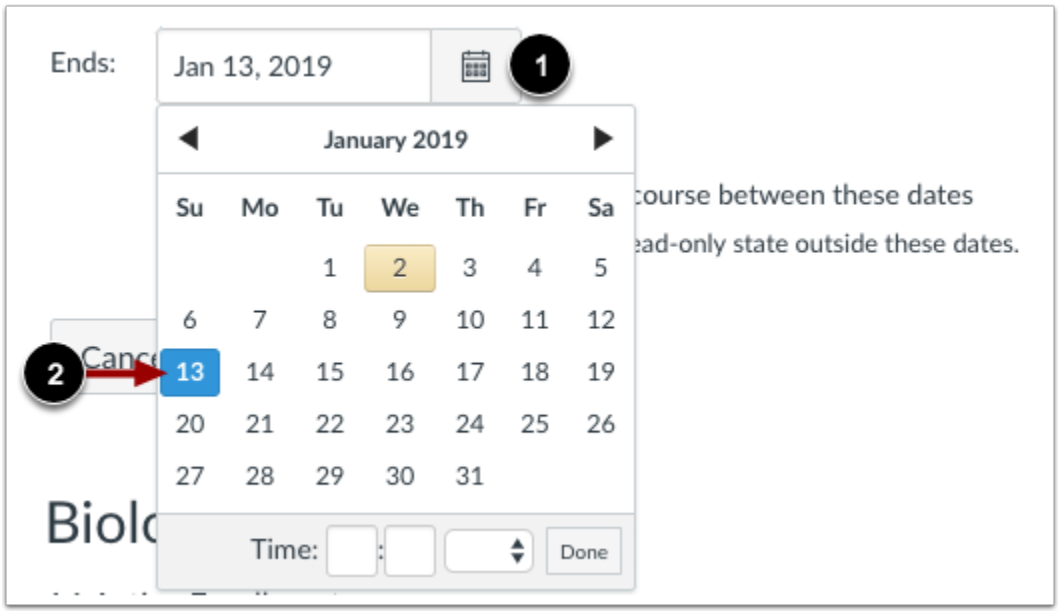
Click the **Edit Section** button.

Set Start Date



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

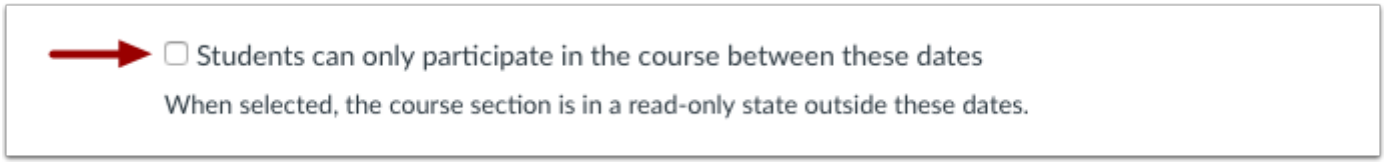
Set End Date



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

Note: End dates occur at precisely the minute they are set. For example, a section with an end time at 11:59pm will end at 11:59:00.

Limit Student Participation



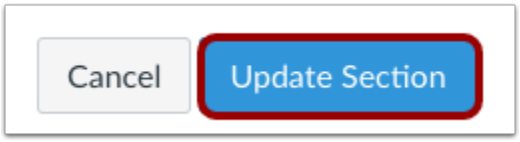
If you do not want to let students participate in the course section outside of the section dates, select the **Students can only participate in the course between these dates** checkbox [1]. Selecting this checkbox creates a section override and overrides the course dates. Students can only participate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

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

Notes:

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

Update Section



Click the **Update Section** button.

How do I use cross-listing in an account?

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

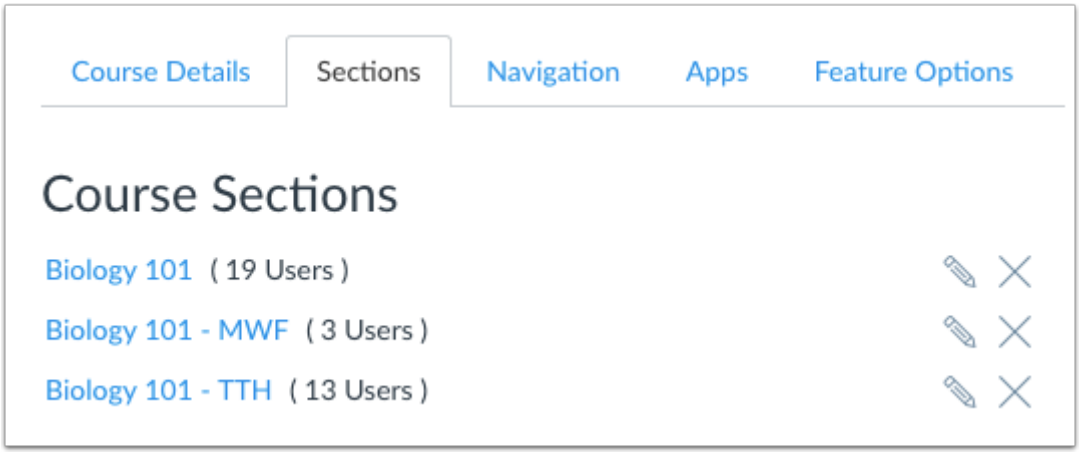
Cross-listing is usually an admin permission only. However, some institutions allow their instructors to cross-list their own sections.

Courses versus Sections



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

Cross-Listing Sections



Cross-listing allows you to move section enrollments from individual courses and combine them into one course. This feature is helpful for instructors who teach several sections of the same course and only want to manage course data in one location. Section names do not change when they are cross-listed; the section is

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

Course Status

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

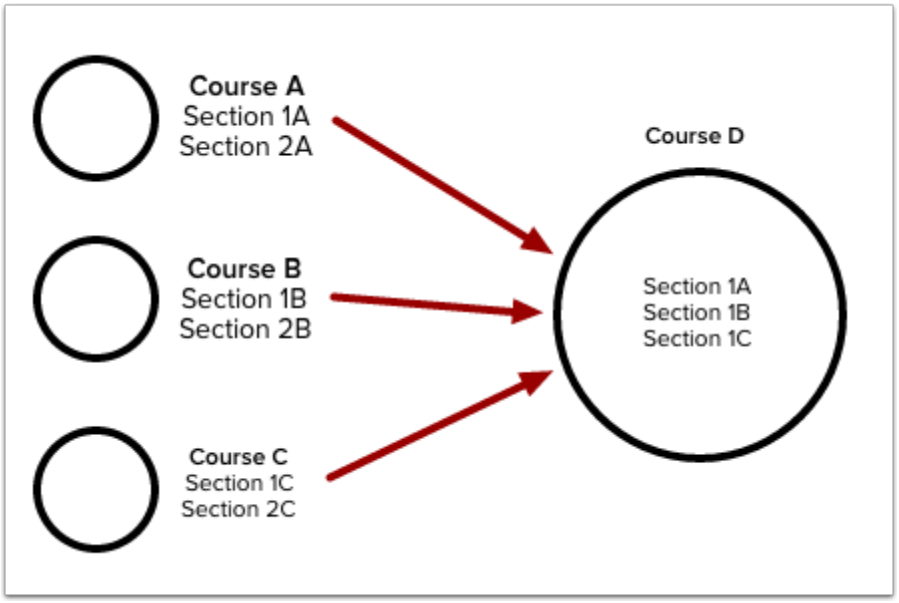
If you need to restore the enrollments, you can de-cross-list a section back to the course. If you need to retain student grades in the original course, you should export the Gradebook and import it into the original course before de-cross-listing the section.

Instructor Enrollments

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

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

Cross-Listing Examples



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

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

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

How do I cross-list a section in a course as an admin?

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

Cross-listing should be done while courses are unpublished. Coursework is retained with the course, not with the section enrollments, so if a published course is cross-listed, all cross-listed enrollments will lose any associated assignment submissions and grades. Conversations between users that were created before a section is cross-listed will not allow replies after cross-listing.

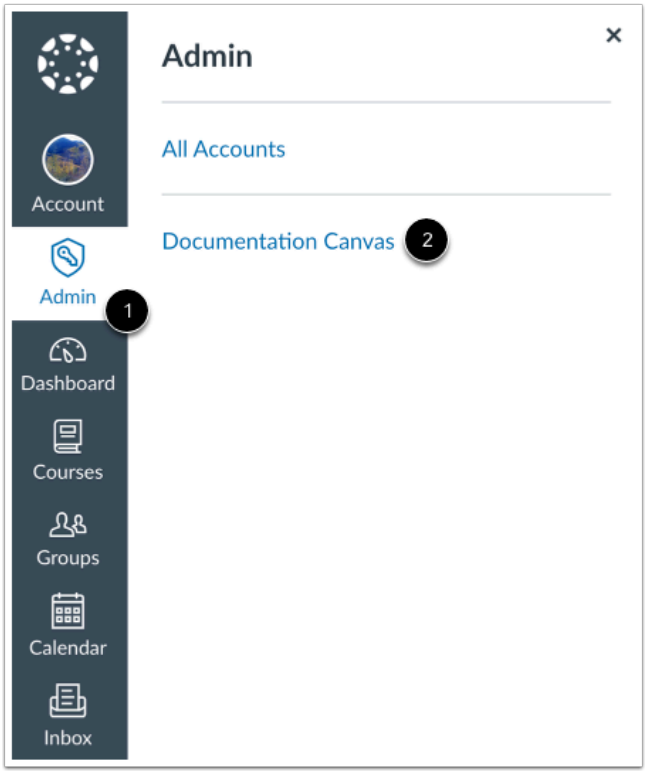
To cross-list a course, you must know the name of the course or the course ID into which you are cross-listing. However, using a course ID is a better way to confirm you are cross-listing a section into the correct course. You can find the course ID by opening the course and viewing the number at the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

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

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

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

Open Account



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

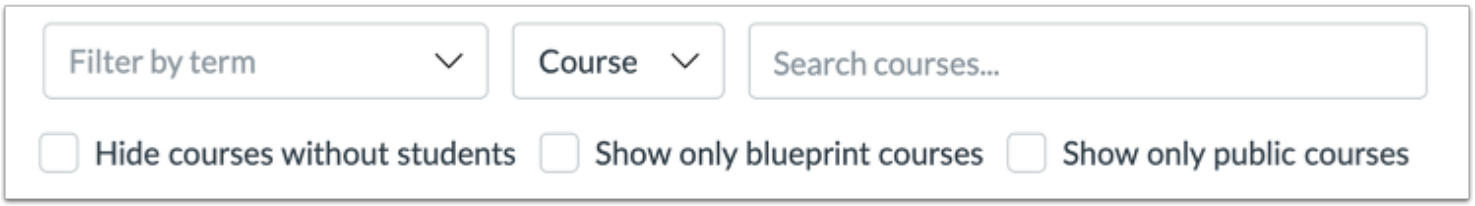
Open Courses



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

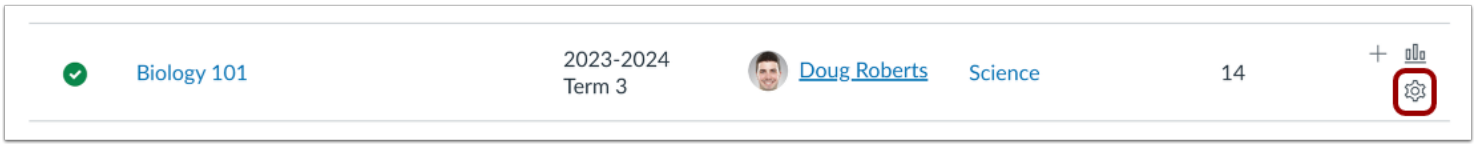
Note: When you open an account, the account defaults to the Courses page.

Find Course



To find the course in the account, use the filter and search options.

Open Settings



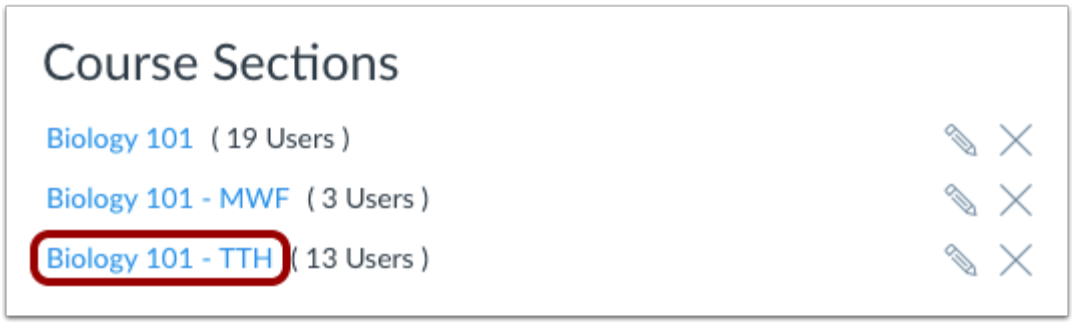
In the courses list, click the child course's **Settings** icon.

Open Sections



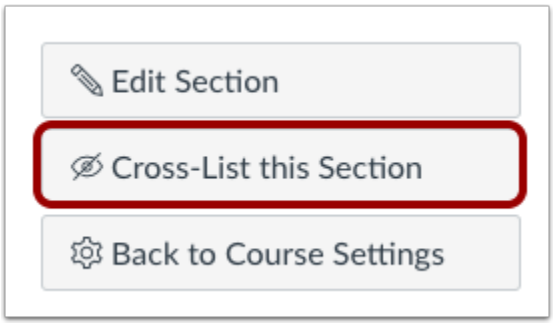
Click the **Sections** tab.

Open Section



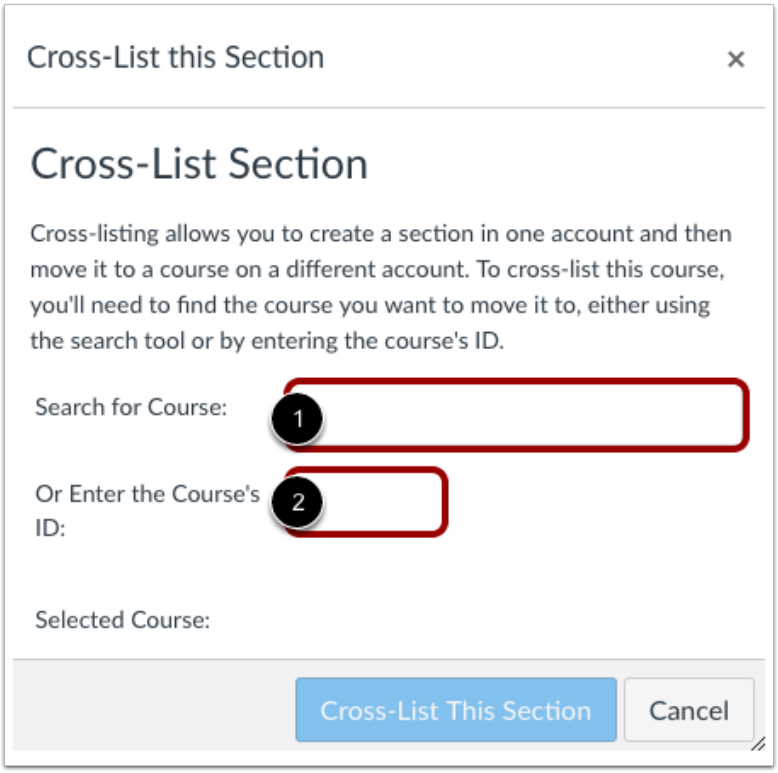
Click the title of the section you want to cross-list.

Cross-List Section



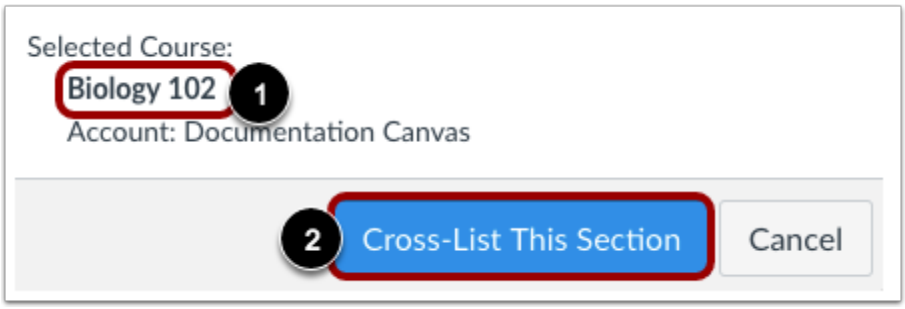
Click the **Cross-List this Section** button.

Search for Course



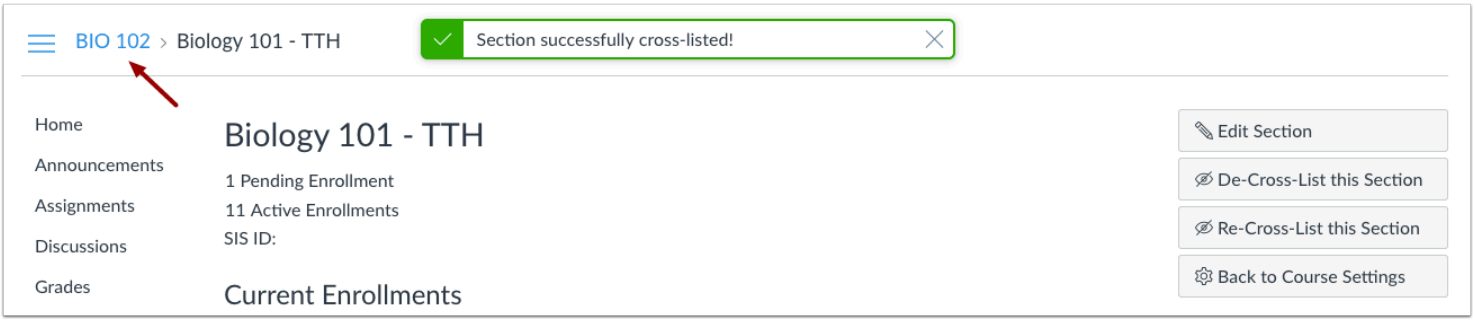
In the Search for Course field [1], enter the name of the course or SIS ID into which you are cross-listing. Or, in the Course ID field [2], enter the ID number for the course.

Cross-List this Section



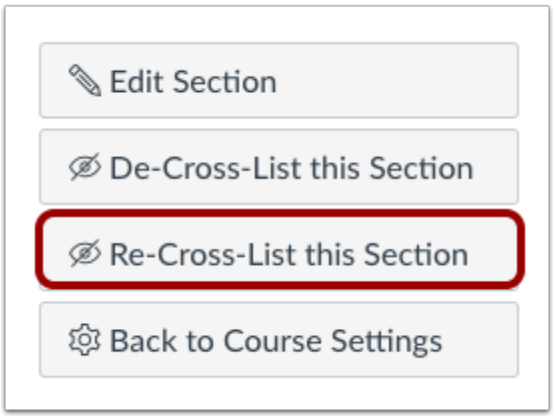
Confirm you have selected the correct course [1]. Click the **Cross-List This Section** button [2].

Confirm Cross-Listing



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

Re-Cross-List Section



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

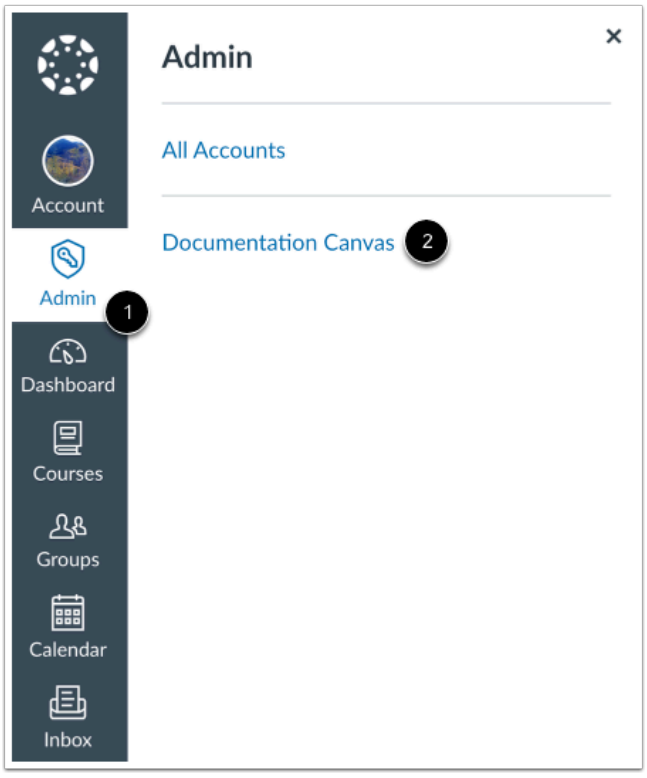
How do I de-cross-list a section in a course as an admin?

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

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

Note: Do not change the course name while cross-listing or de-cross-listing courses.

Open Account



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

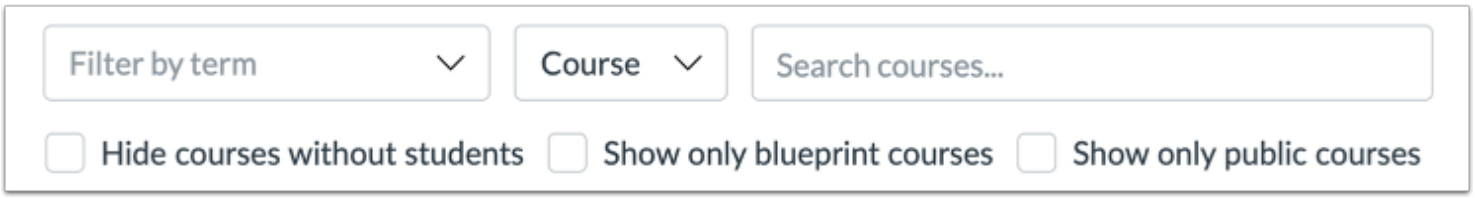
Open Courses



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

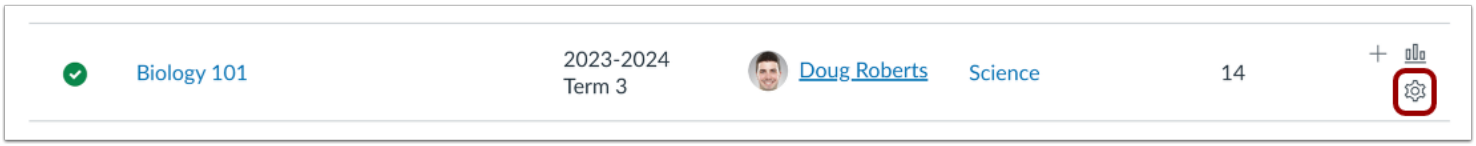
Note: When you open an account, the account defaults to the Courses page.

Find Course



To find the course in the account, use the filter and search options.

Open Settings



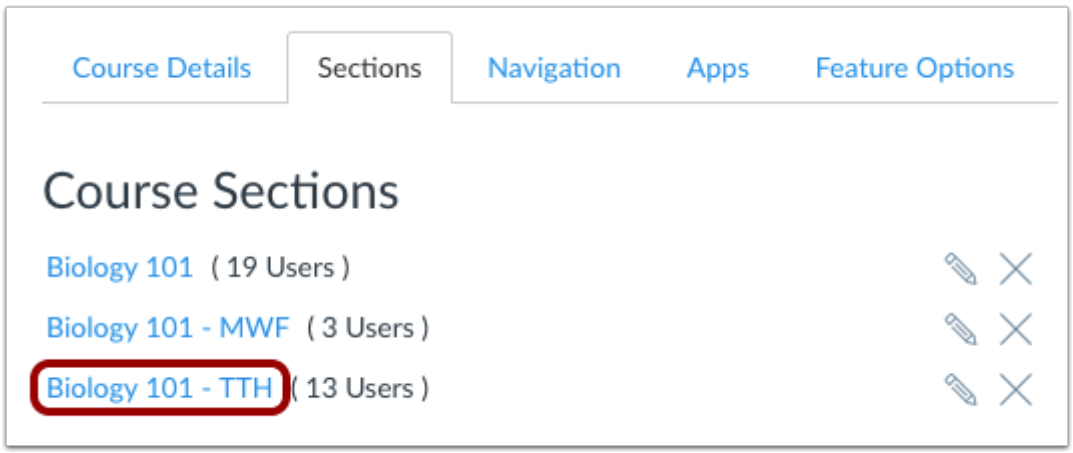
In the courses list, click the course **Settings** icon.

Open Sections



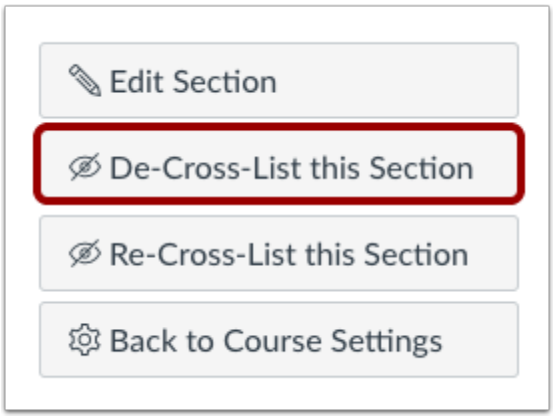
Click the **Sections** tab.

Open Section

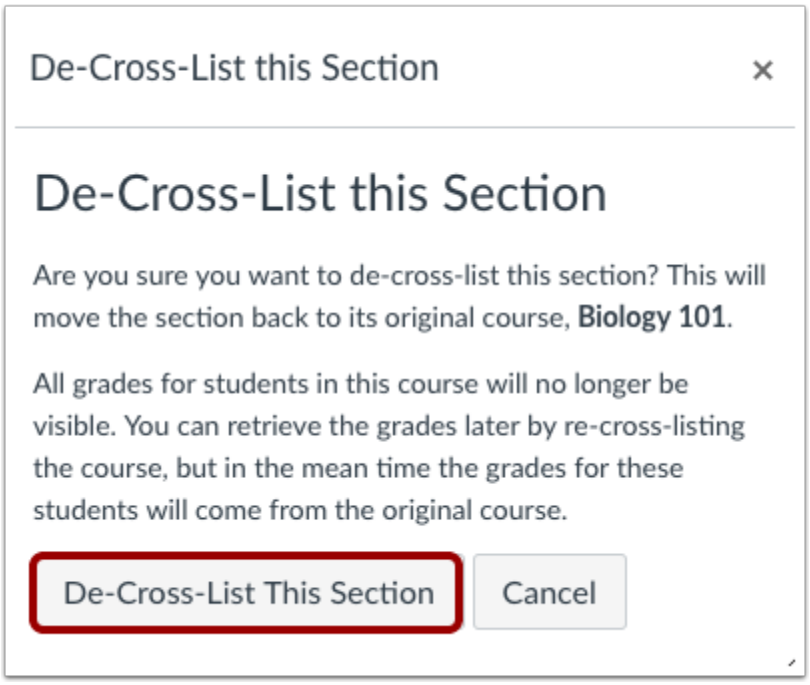


Click the title of the section you want to de-cross-list.

De-Cross-List This Section



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



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

Note: If you de-cross-list a section that includes student grades, Canvas will include a message that all grades will no longer be visible. If you need to retain student grades and put them in the original course, you should export the Gradebook and import it into the original course before de-cross-listing the section.

How do I conclude a course at the end of a term as an admin?

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

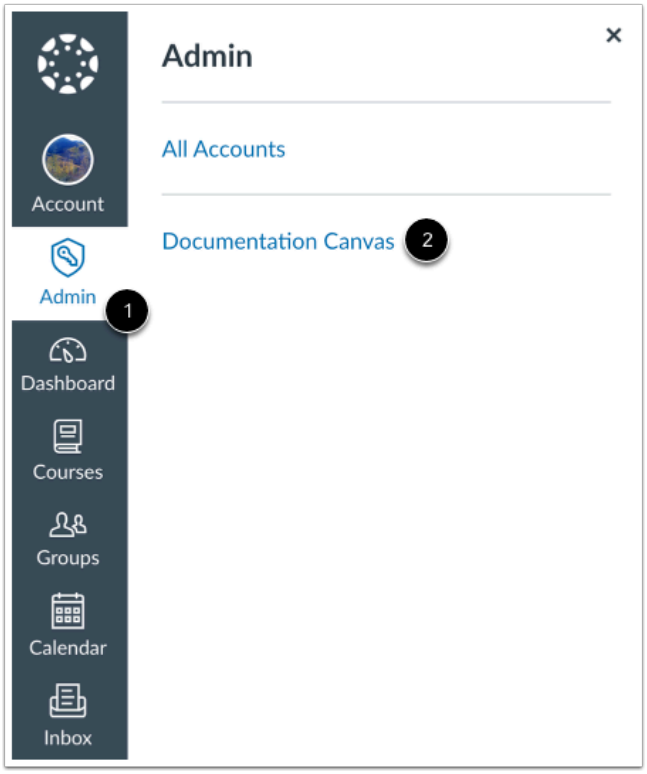
When courses are manually concluded, all enrollments are removed from the course and placed in the prior enrollments page. All users in the course will have read-only access. This change applies to all enrollments, including course instructors. Instructor-based roles will no longer have the same access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

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

Notes:

- Manually concluding a course is a course permission. If the Conclude this Course button does not appear in Course Settings, this setting has been restricted for your course. If you are an instructor, contact your admin for assistance.
- Manually concluding, or hard concluding, a course results in loss of user access and functionality for all user roles. To preserve user access and information, and course functionality for instructors, consider soft concluding a course using term dates or course end dates.
- When a course is concluded, the course participation end date is automatically populated with the current date and time.

Open Account



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

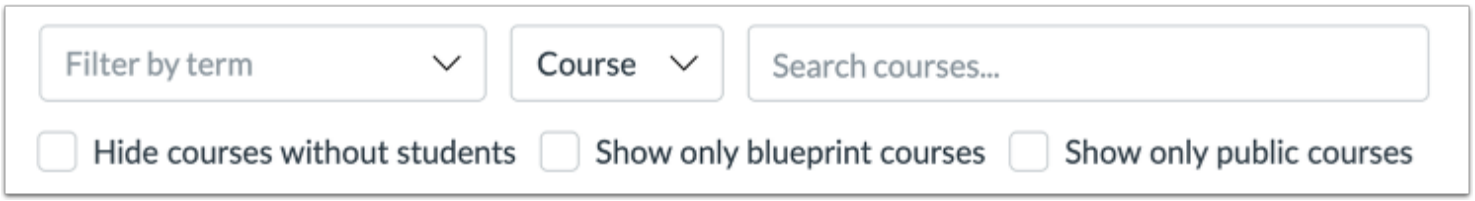
Open Courses



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

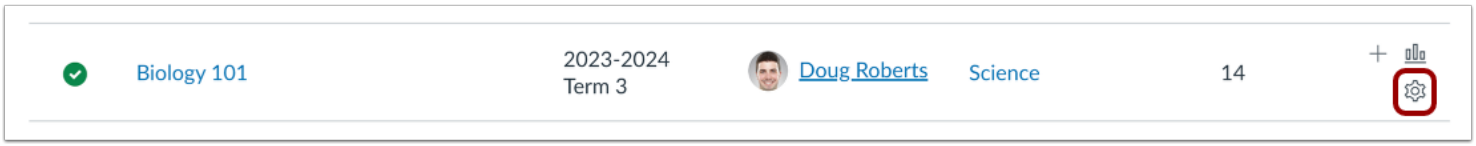
Note: When you open an account, the account defaults to the Courses page.

Find Course



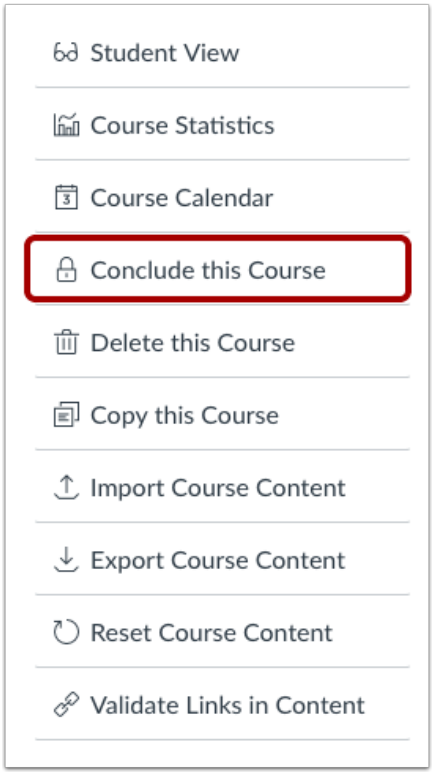
To find the course in the account, use the filter and search options.

Open Settings



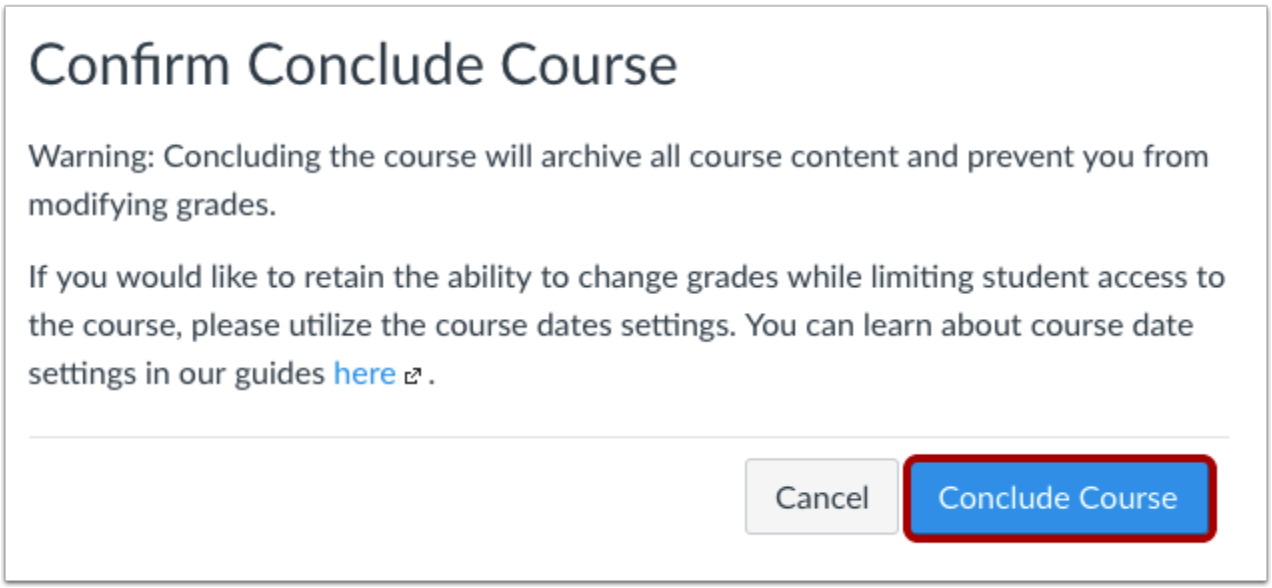
In the courses list, click the course **Settings** icon.

Conclude This Course



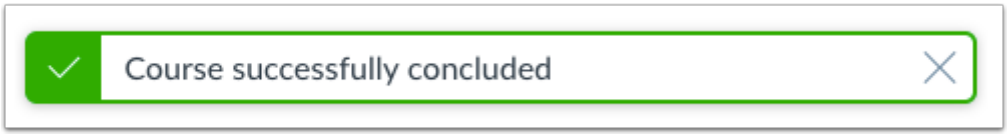
To conclude your course, click the **Conclude this Course** button.

Conclude Course



Click the **Conclude Course** button.

View Confirmation



Verify that the course has been concluded.

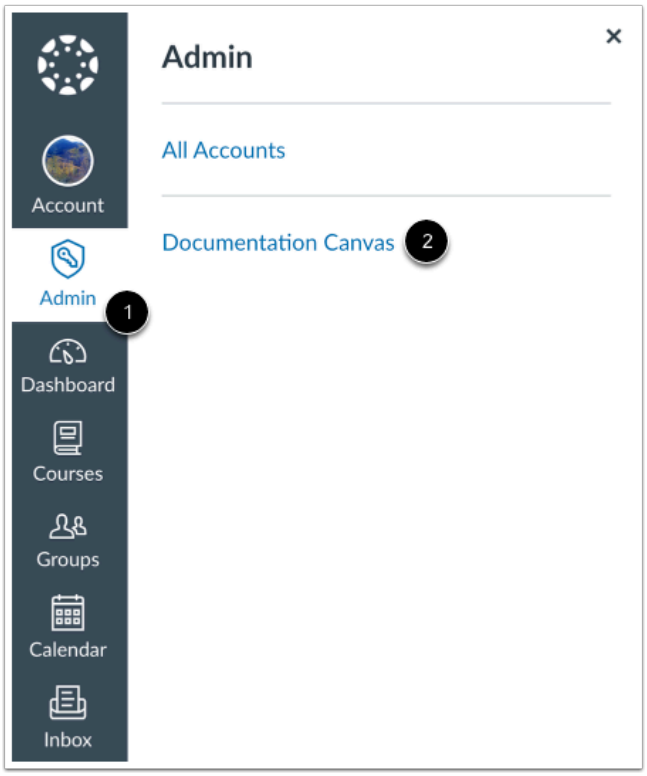
How do I unconclude a course in an account?

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

Notes:

- When a course is unconcluded, the course participation end date and time are automatically removed.
- You can't unconclude a course if the term has been concluded. The course needs to be in a current term in order to be unconcluded.

Open Account



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

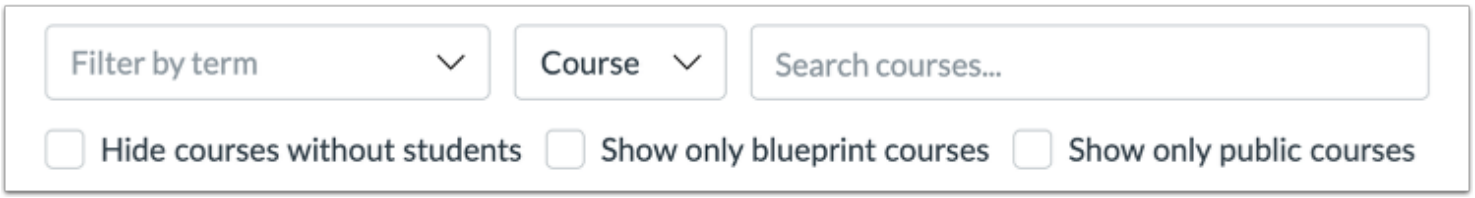
Open Courses



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

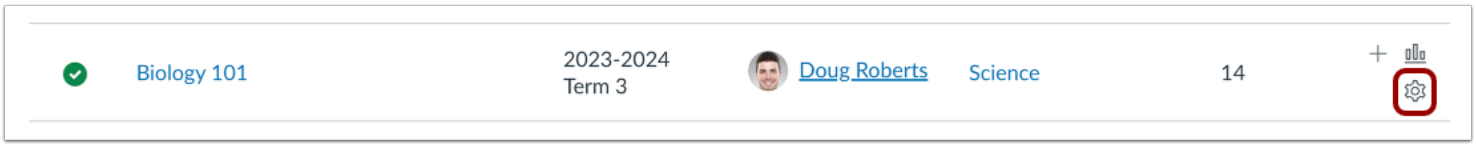
Note: When you open an account, the account defaults to the Courses page.

Find Course



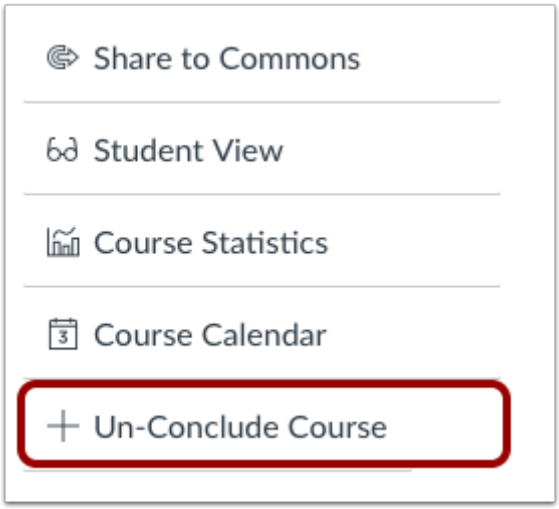
To find the course in the account, use the filter and search options.

Open Settings



In the courses list, click the course **Settings** icon.

Unconclude Course



Click the **Unconclude Course** button.

View Confirmation



Verify that the course has been unconcluded.

How do I enable a course as a blueprint course as an admin?

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

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

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

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

General Locked Objects

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

Locked Objects by Type

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

Object Definition Changes

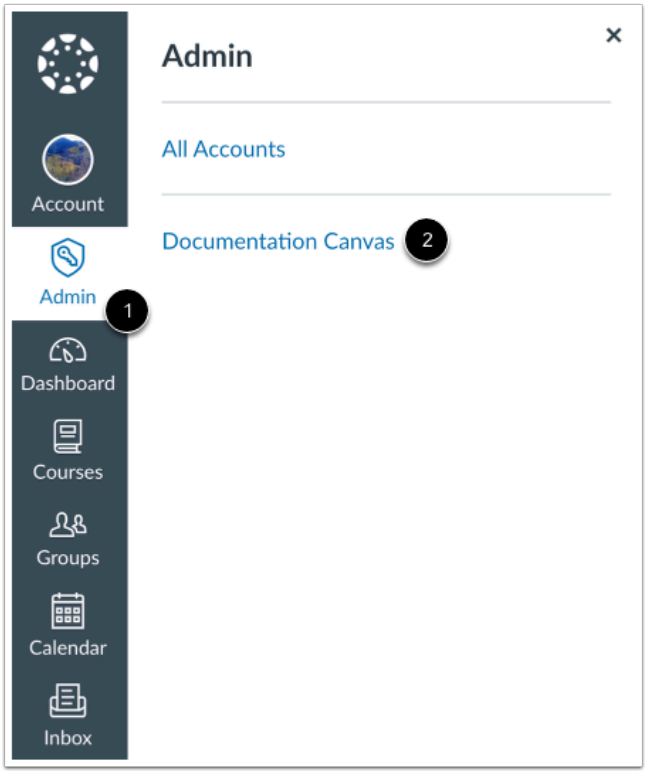
You may change object definitions and attributes for locked objects in Course Settings at any time. However, unlocking any previously locked attribute retroactively applies to all related locked objects in the associated course. If a previously locked attribute is enabled, or unlocked, in the blueprint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

Please ensure definitions and attributes are specified before making associated courses available to instructors.

Notes:

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

Open Account



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

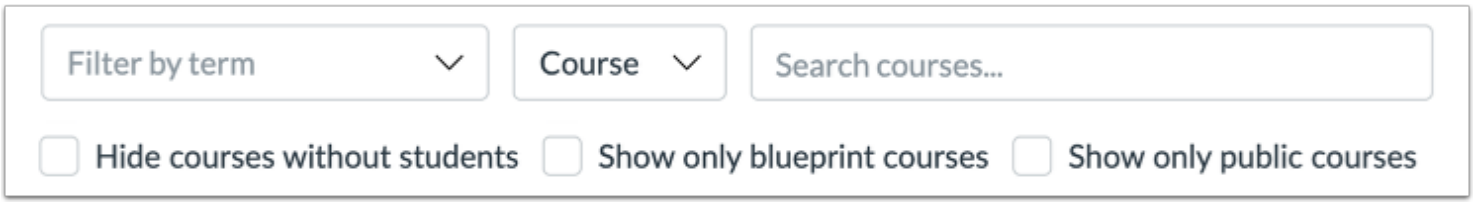
Open Courses



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

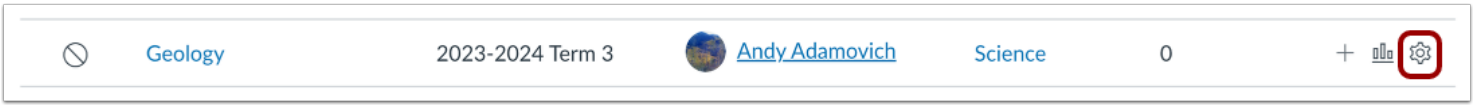
Note: When you open an account, the account defaults to the Courses page.

Find Course



To find the course in the account, use the filter and search options.

Open Settings



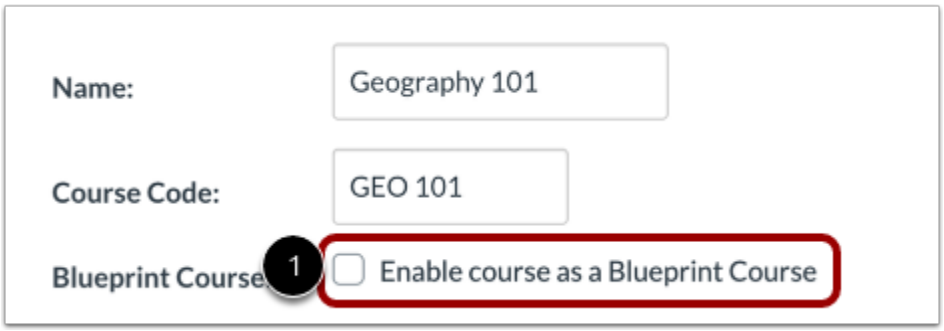
In the courses list, click the course **Settings** icon.

Open Course Details



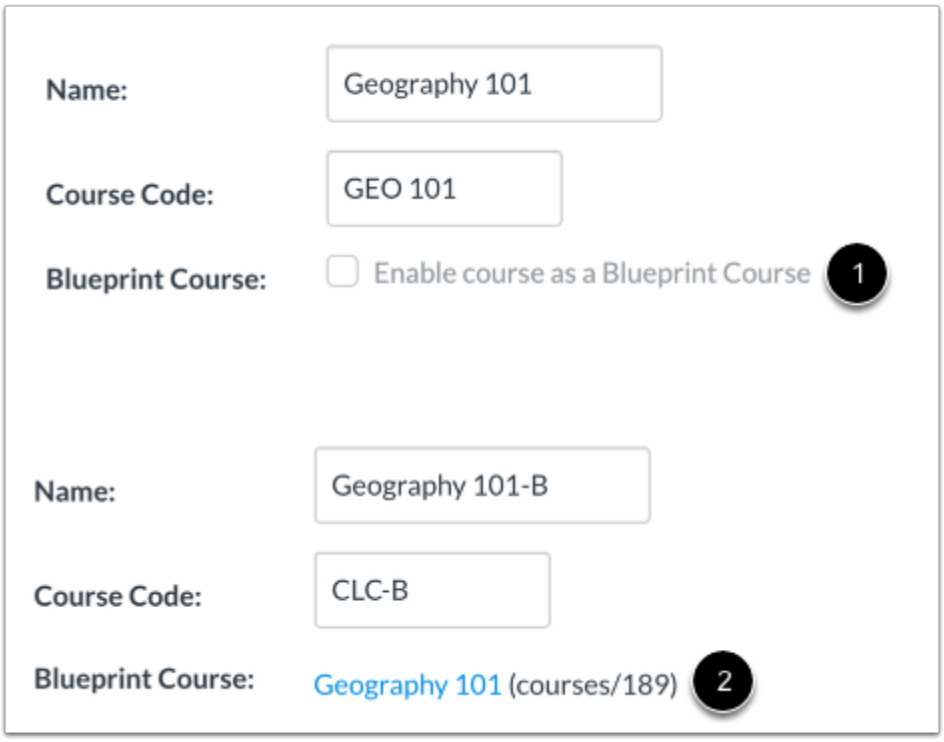
Click the **Course Details** tab.

Enable Course



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

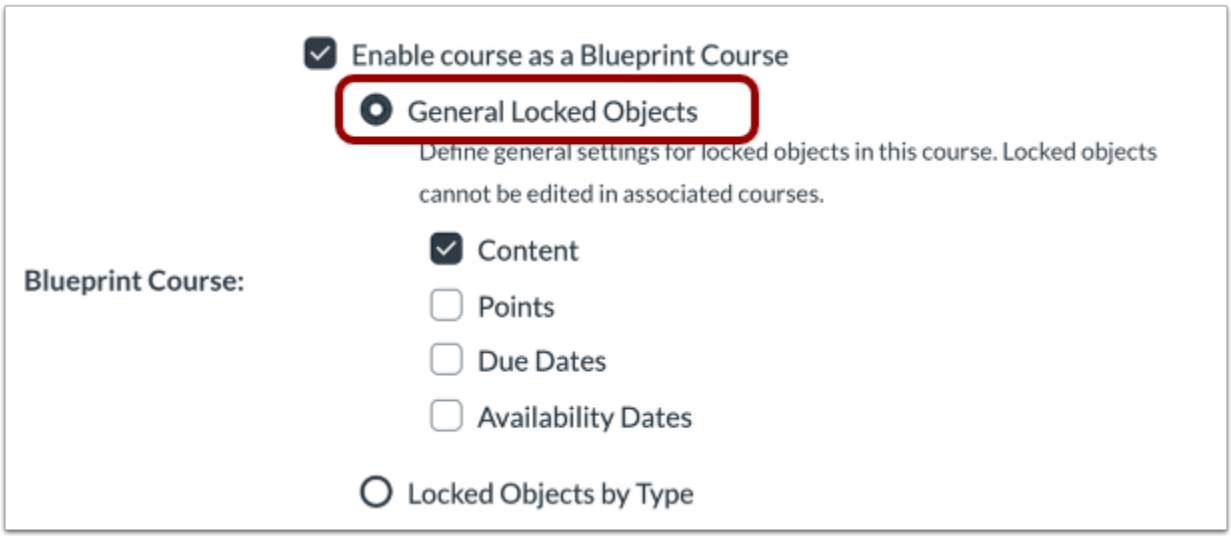
View Restrictions



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

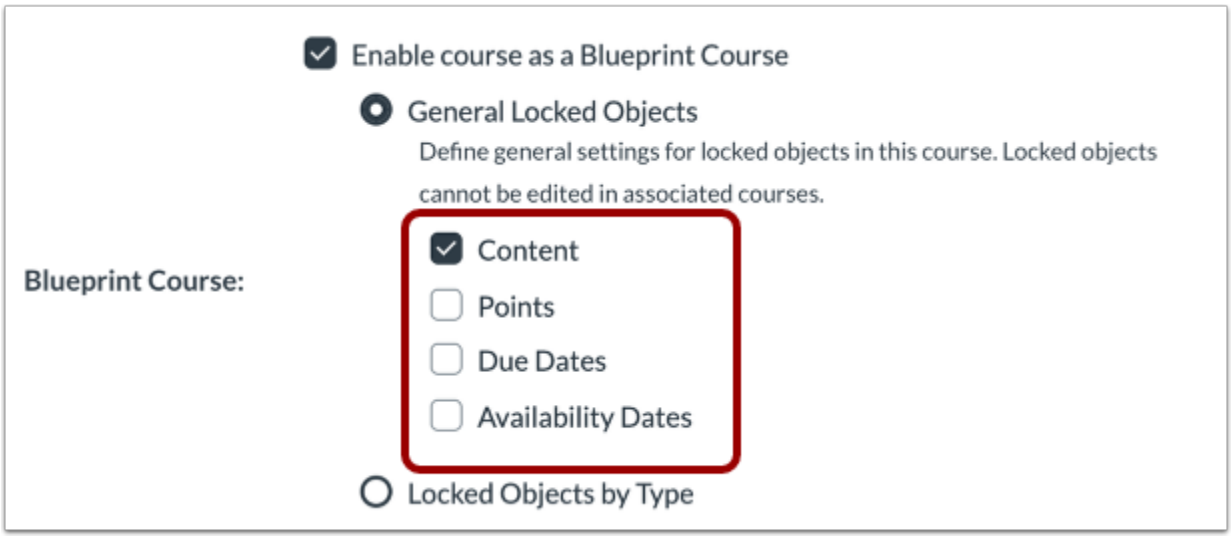
If the course is already associated with a blueprint course, you can view the course name and course ID as a reference (e.g. courses/XXX) [2]. The name of the blueprint course includes a link to access the blueprint course.

Define General Locked Objects



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

Select Attributes

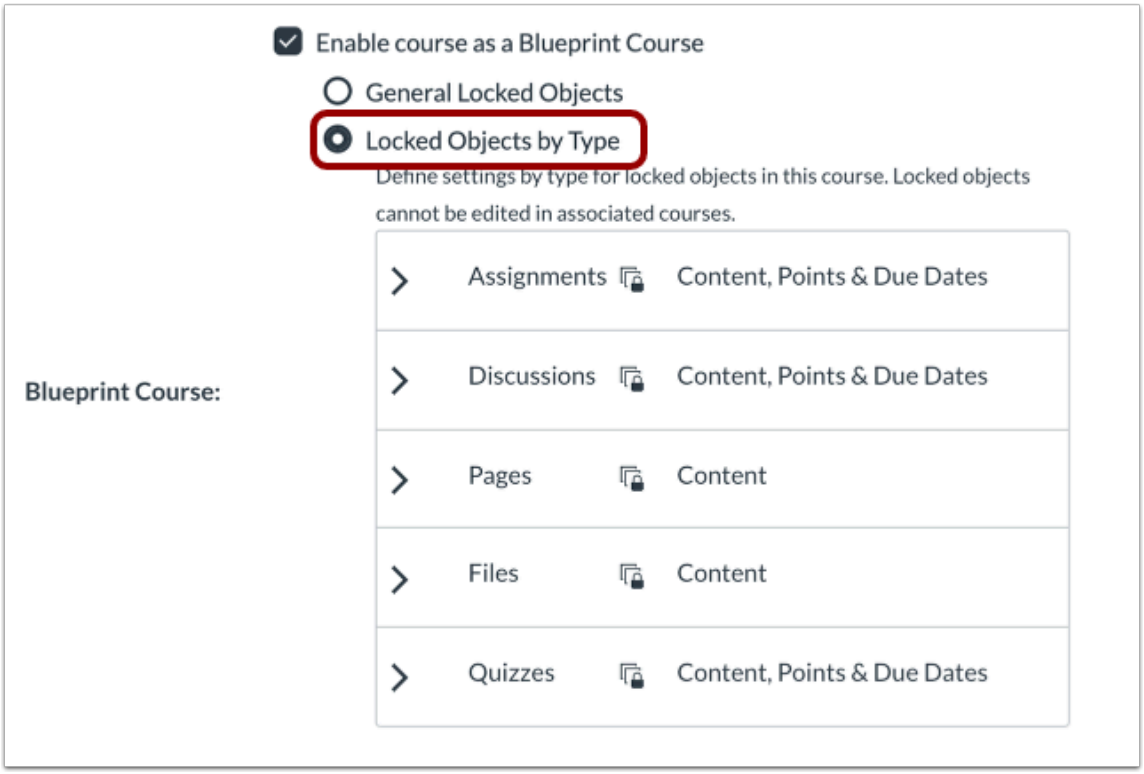


As part of the general settings, select the attributes for the locked objects in this course. General locked objects support four attributes across any course object: content, points, availability dates, and due dates.

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

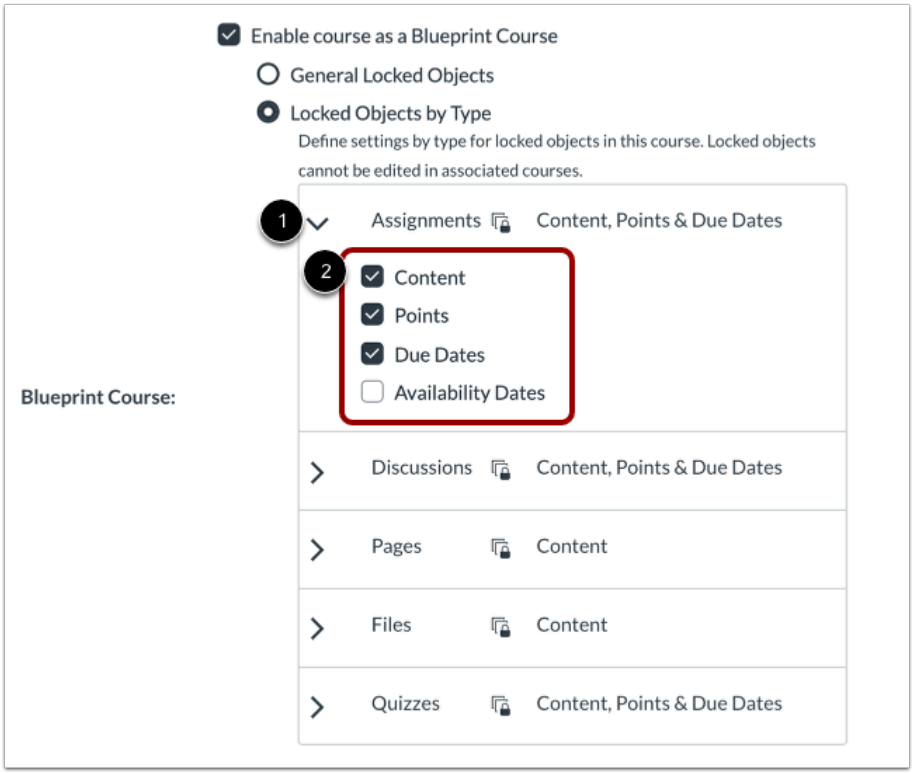
Locked objects cannot be edited in associated courses. For instance, when Content is selected as a locked object attribute, instructors in associated courses are not able to edit any content for any locked objects. Content also includes the title of the content item.

Define Locked Objects by Type



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

Select Attributes

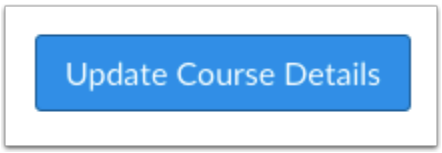


Blueprint courses support and sync five object types: assignments, discussions, pages, files, and quizzes. To select an attribute for an object type, expand the attribute type menu [1] and select individual attributes that apply to each locked object [2]. When an attribute is selected, the attribute name displays next to the object type.

Notes:

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

Update Course Details



Click the **Update Course Details** button.

How do I associate a course with a blueprint course as an admin?

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

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

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

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

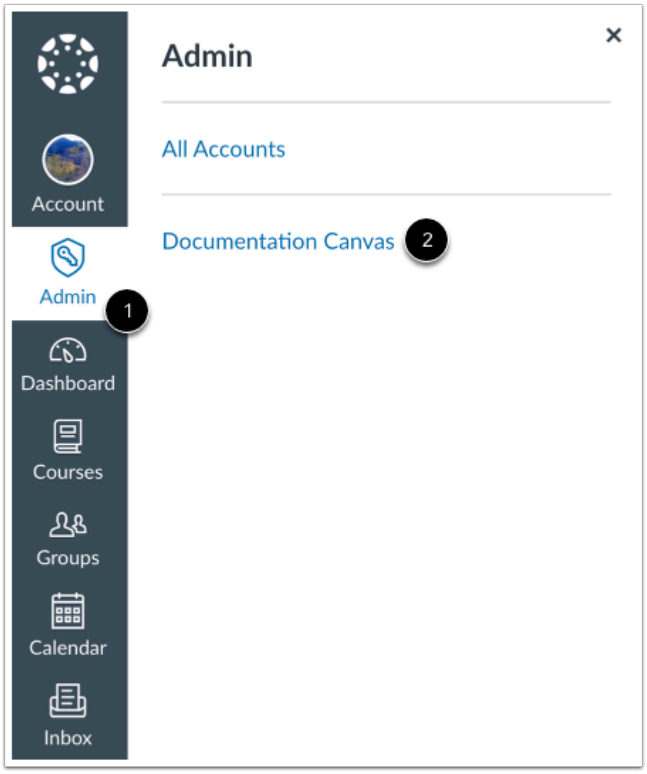
Concluded Courses

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

Notes:

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

Open Account



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

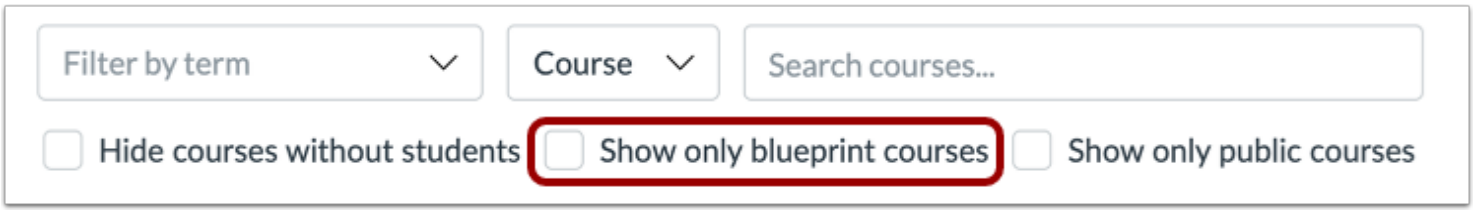
Open Courses



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

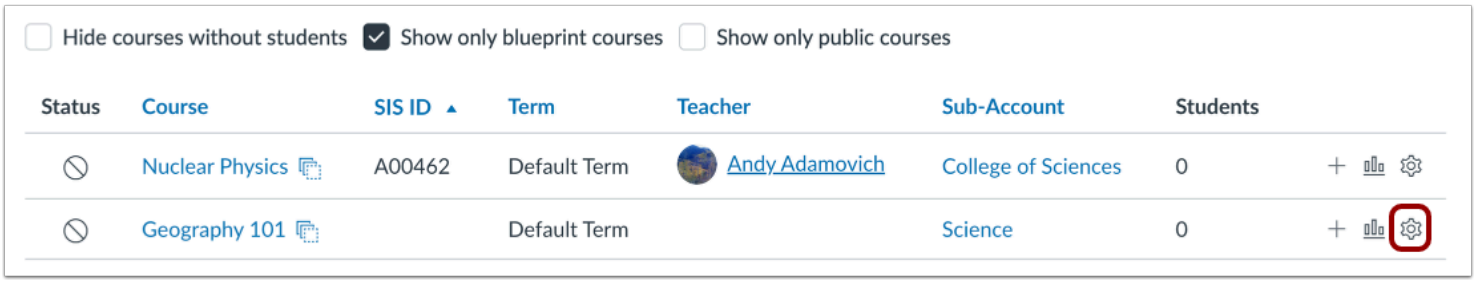
Note: When you open an account, the account defaults to the Courses page.

Find Course



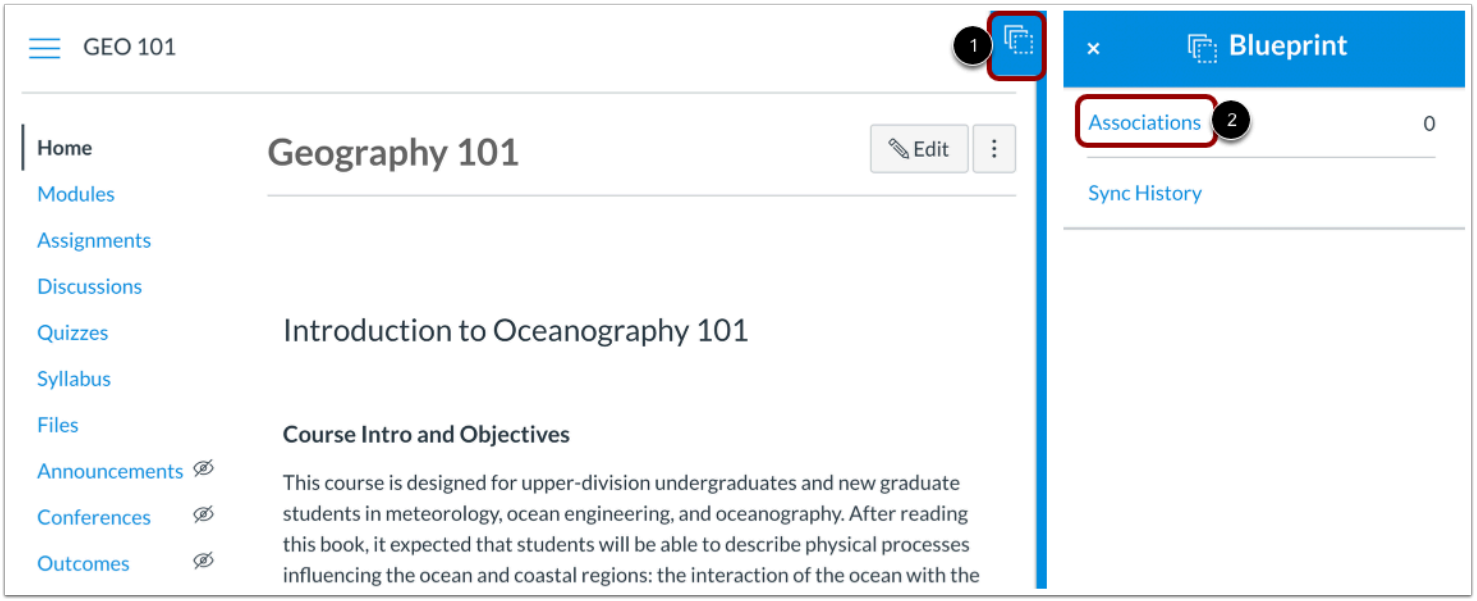
To find courses in the account that are blueprint courses, click the **Show only blueprint courses** option.

Open Course Settings



In the courses list, click the course **Settings** icon.

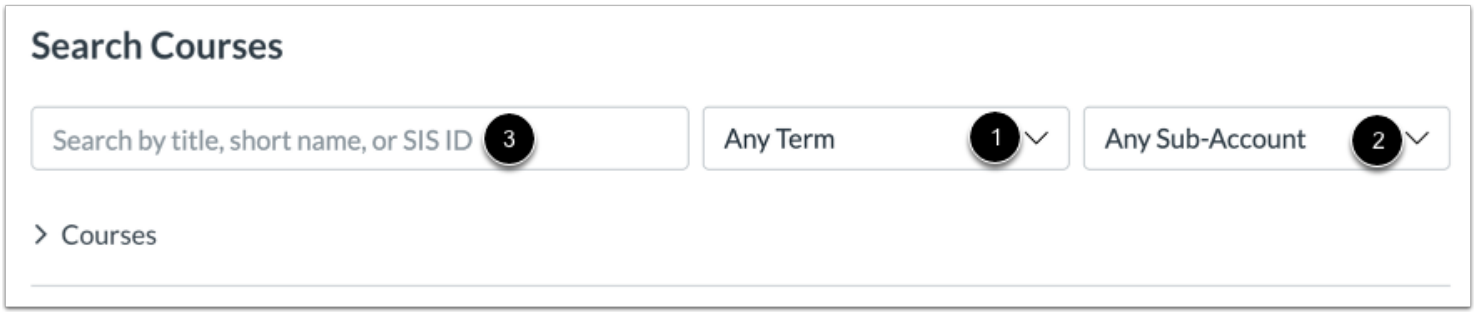
Open Associations



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

Note: You can access the Blueprint sidebar from any Course Navigation page

Filter Courses

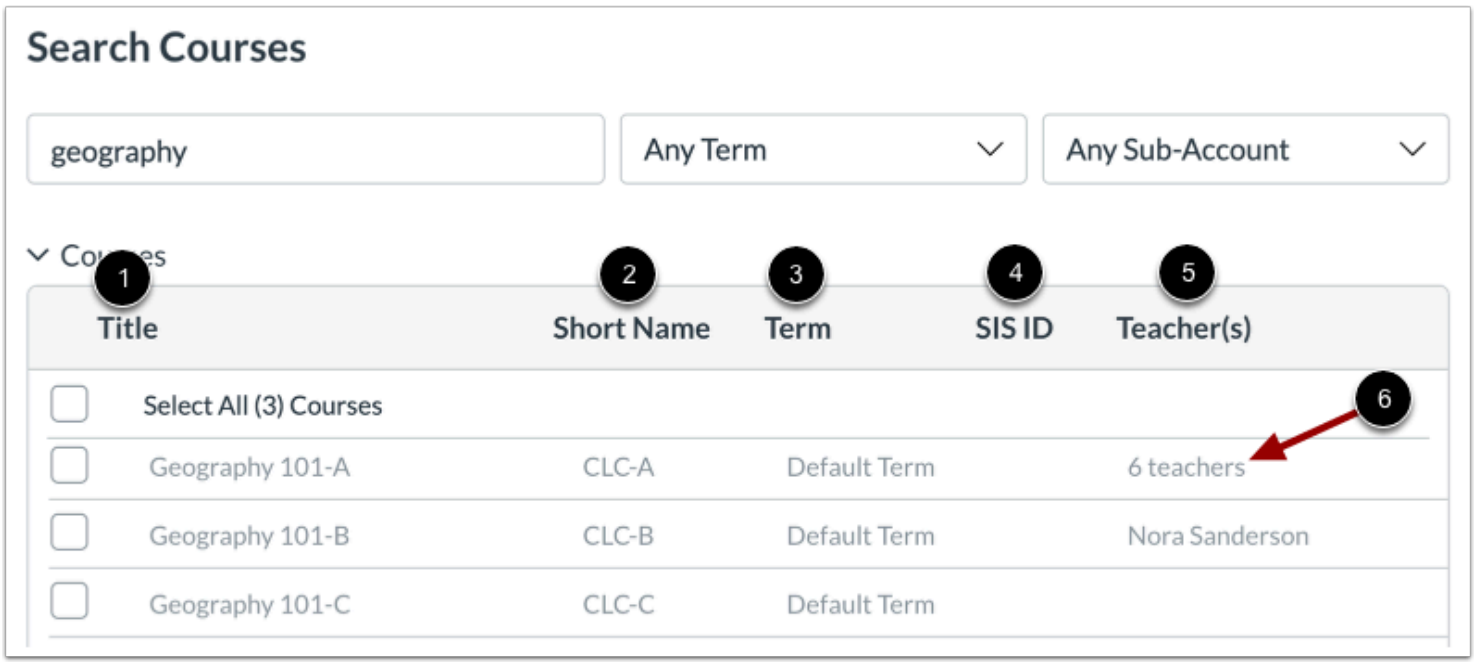


The Associations page displays any courses that are associated with the blueprint course. Once a course is associated with a blueprint course, it cannot be associated with any other blueprint course.

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

You can also locate a specific course in the search field [3]. Enter the title, short name (course code), or SIS ID for a course. Course nicknames are not supported in the search field. Deleted courses do not display in search results.

View Search Results



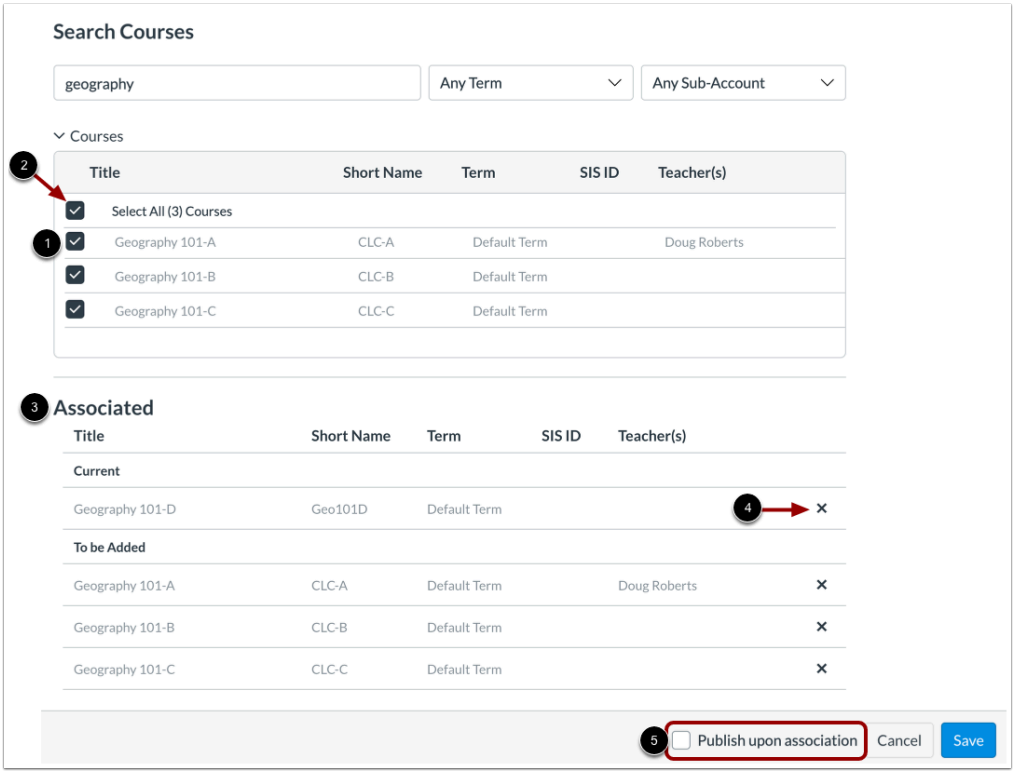
Once a term or subaccount is selected, the Courses list will expand and display all results in the selected term or subaccount. If an entry is added to the search field, the list will update with any relevant search results.

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

Notes:

- Search results will display up to 100 courses. If you wish to associate more than 100 courses at a time, consider creating a CSV file to upload using the SIS import tool.
- If six or more instructors are associated with a course, the Teacher(s) column displays the number of instructors [6].

Add Courses



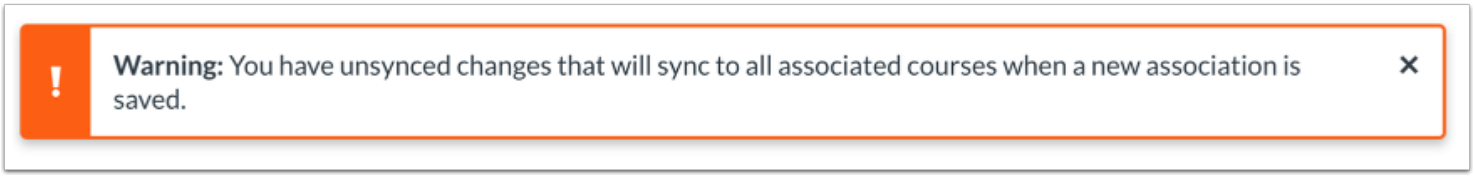
To associate a course with the blueprint course, click the checkbox next to the course title [1]. You can select multiple courses at one time, or you can select all courses by clicking the **Select All Courses** checkbox [2].

Current associated courses and courses to be added display in the **Associated Courses** section [3]. To remove a course as an association, click the **Remove** icon [4].

To publish courses selected for association, click the **Publish upon association** checkbox [5].

Note: The Publish upon association checkbox will only publish courses in the To be Added list and will not publish courses that were already associated.

View Unsynced Warning



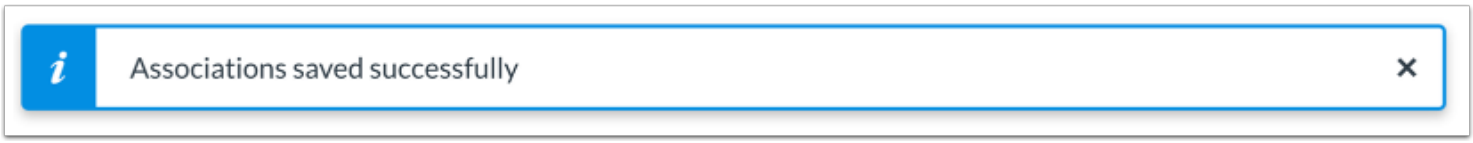
If you have unsynced changes in your blueprint course when you are associating a course, Canvas generates a warning to let you know the the unsynced changes will be synced to all associated courses.

Save Courses



Click the **Save** button.

Confirm Courses



View your associated changes were saved.

Modify Associations



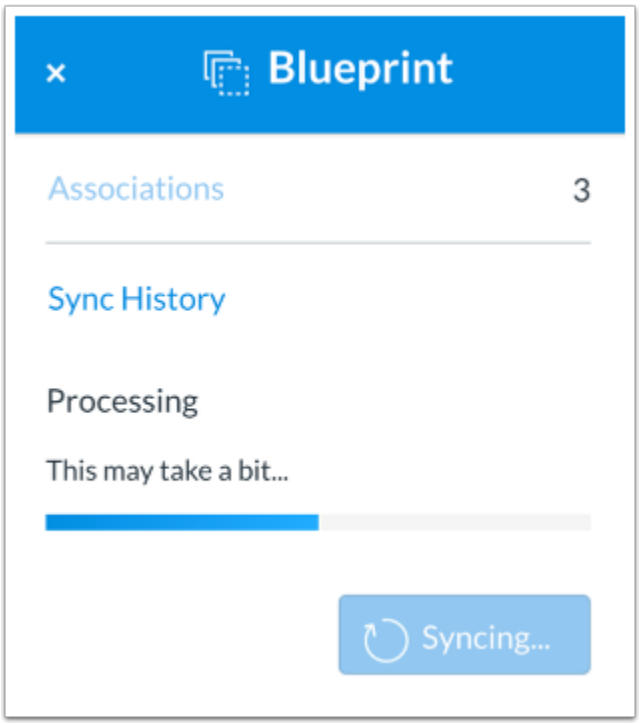
You can add and save additional associated courses, if necessary.

To remove a course, click the **Remove** icon.



When you are finished with course associations, click the **Done** button.

View Sync



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

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

Notes:

- If you immediately view an associated course and don't see any updates, the sync may still be in process. To confirm sync completion, enable the Blueprint sync notification in User Settings.
- Sync history will show the date and time the sync was made but no details will be included related to the sync.
- Only BluePrint master course content will sync with associated courses. Content that was manually added or copied using a different format will not sync.

How do I lock course objects in a blueprint course as an admin?

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

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

Locked Objects

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

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

Unlocked Objects

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

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

Object Management

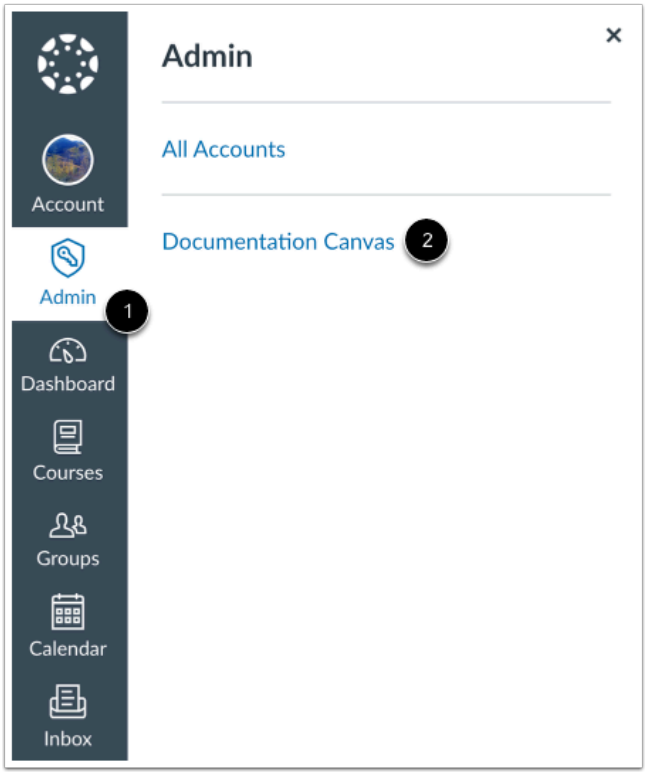
This article shows how to lock an object from the Assignments page. Objects can also be managed in the Files, Modules, Pages, and Quizzes.

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

Notes:

- You can only lock and unlock objects created in the blueprint course. Any new objects added to an associated course by an instructor does not include a blueprint icon and is not associated with the blueprint course.
- You can only lock and unlock new quizzes if New Quizzes is enabled for your institution.

Open Account



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

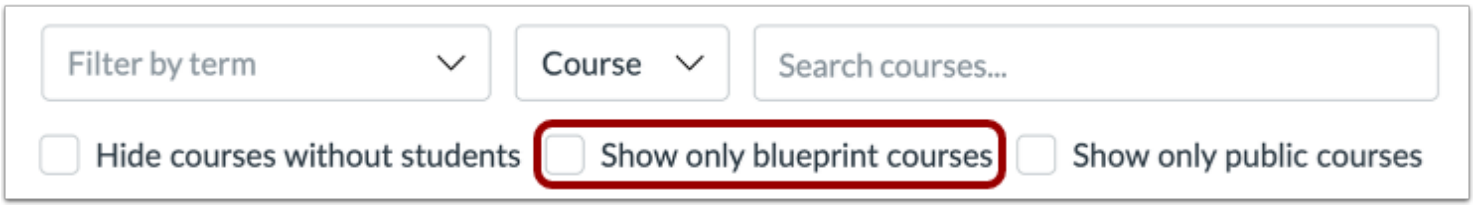
Open Courses



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

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

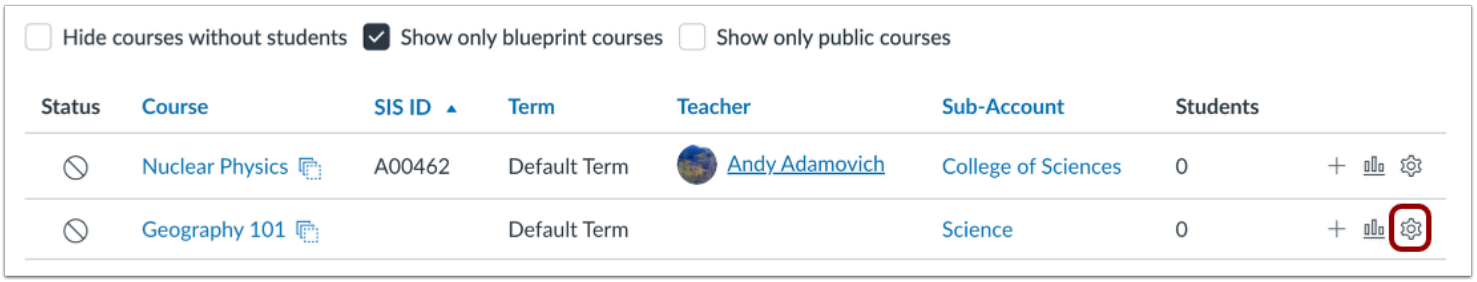
Find Course



To find the course in the account, use the filter and search options.

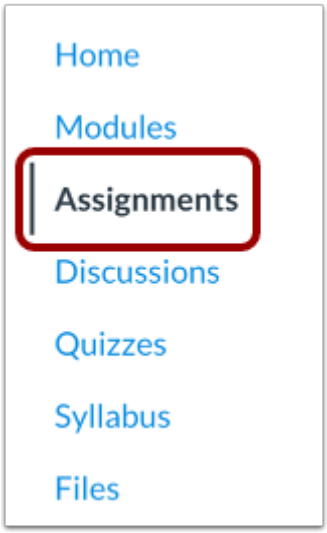
To include only blueprint courses in your search results, click the **Show only blueprint courses** option.

Open Course Settings



In the courses list, click the course **Settings** icon.

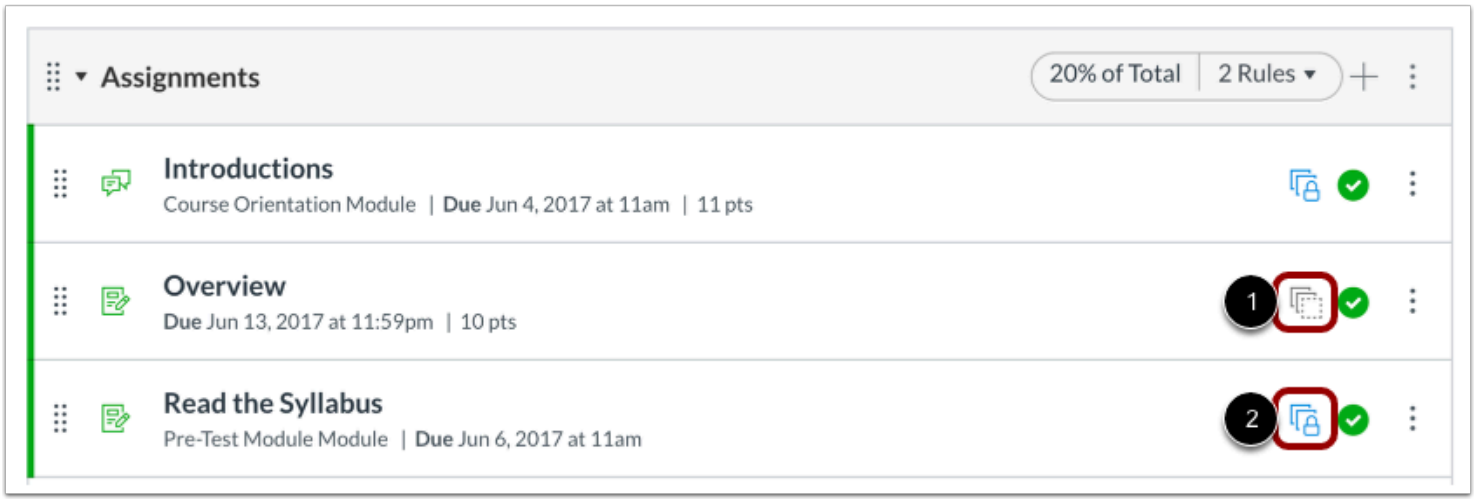
Open Assignments



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

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

View Icon Status



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

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

Lock Object



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

Unlock Object



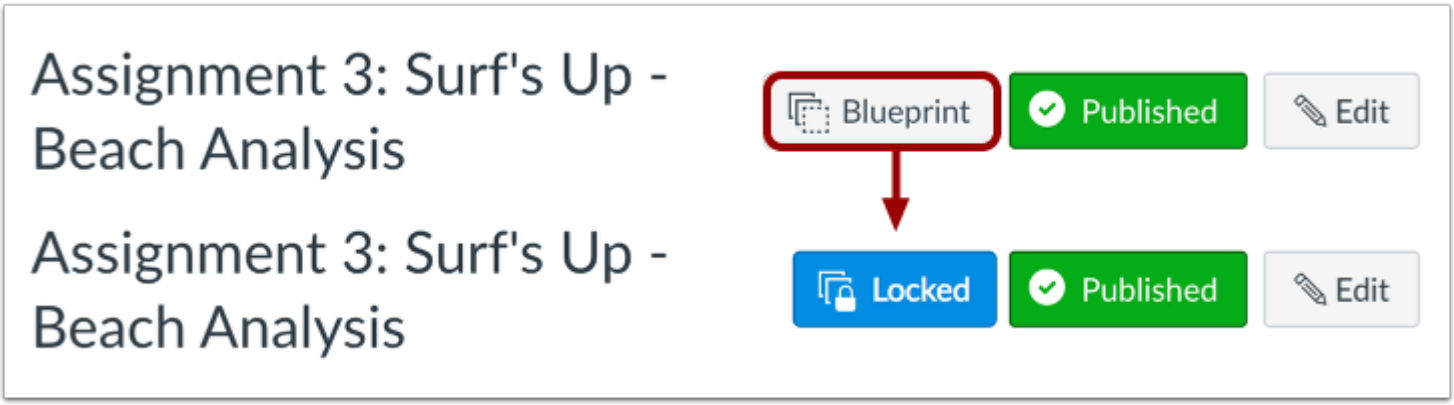
To unlock an object, click the object's lock icon. The hover text will confirm you want to unlock the object.

View Status in Individual Object

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

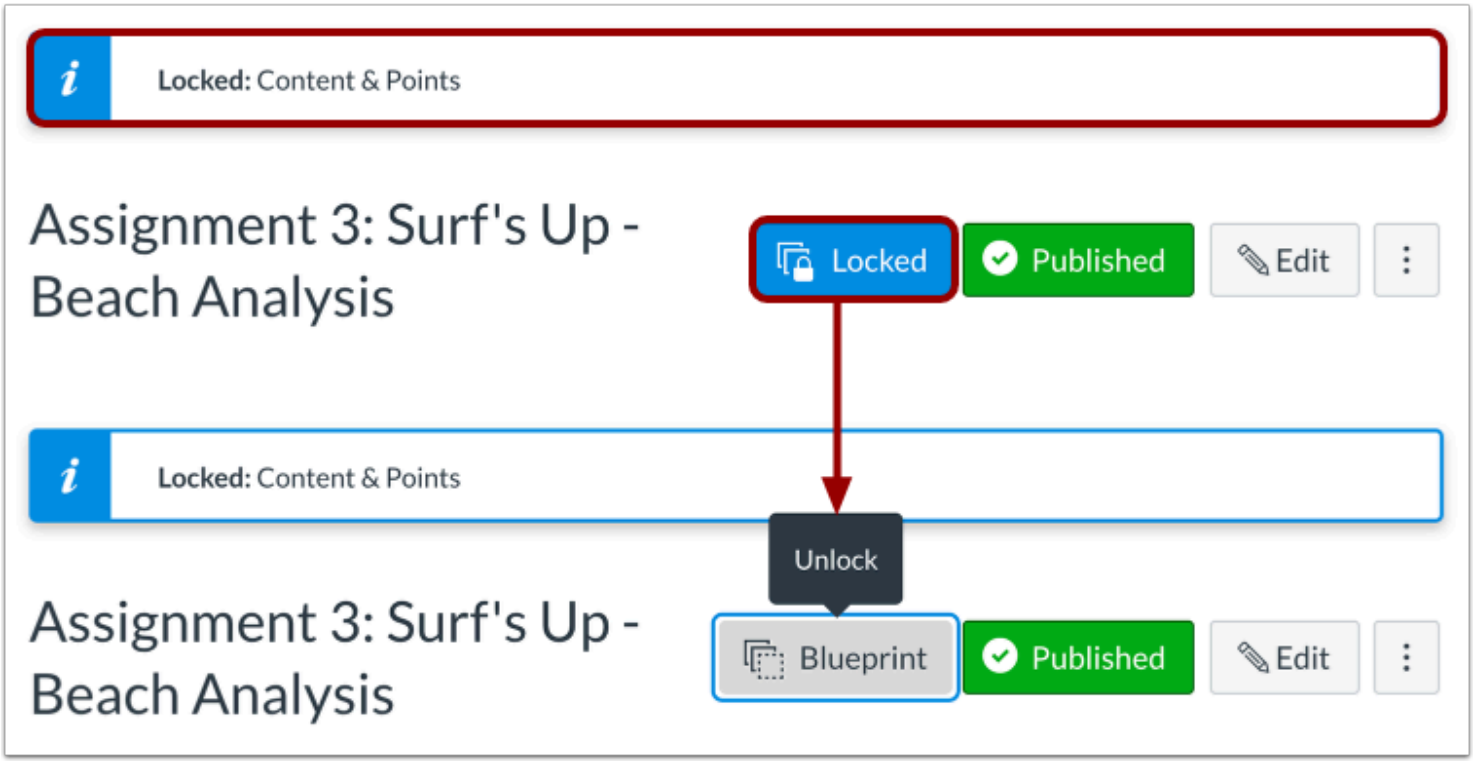
Files can only be locked or unlocked in the Files Index Page.

Lock Object



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

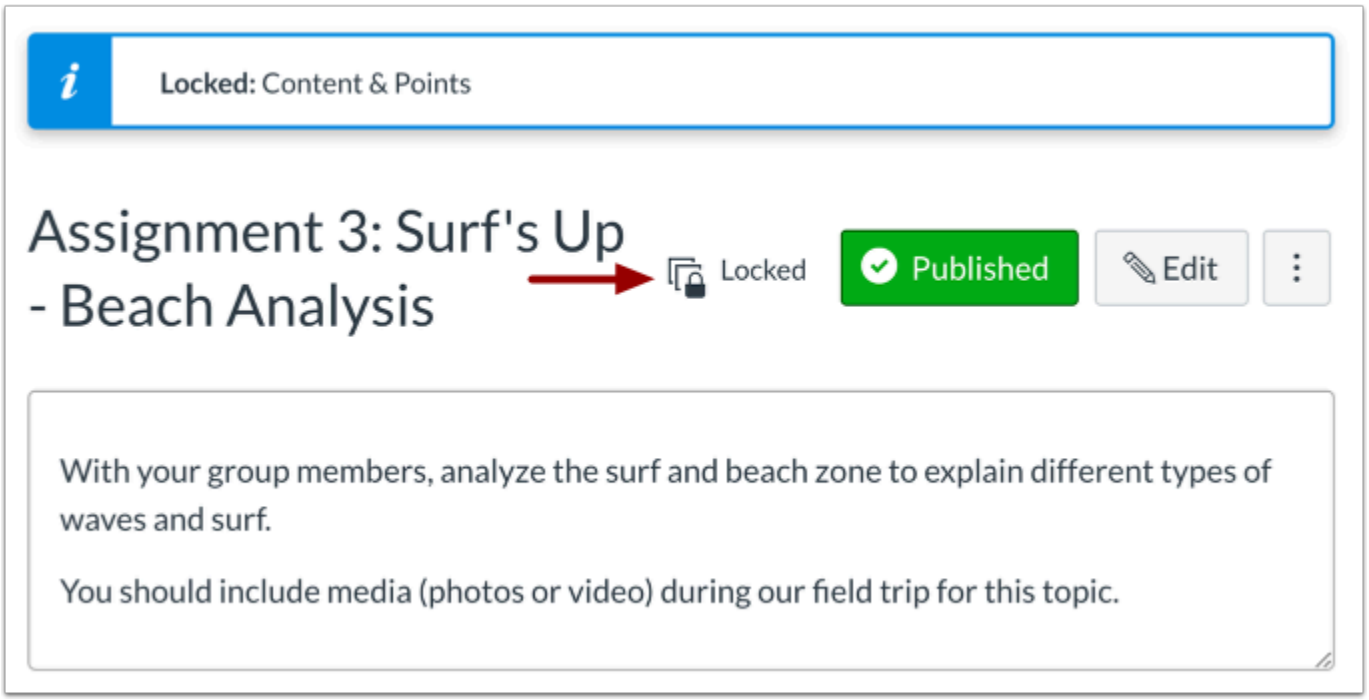
Unlock Object



Individual objects show the attributes that have been locked.

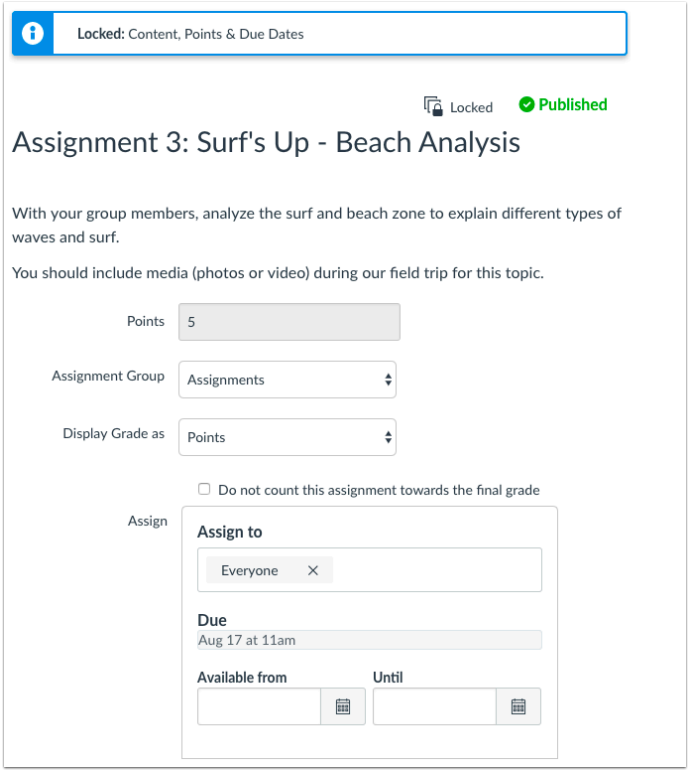
To unlock a locked object, click the **Locked** button. The button will change from blue to gray and indicate the object is unlocked. The locked attributes banner will also be removed from the page.

View Instructor Access



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

For locked objects, the individual page displays the locked attributes selected in Course Settings, if any. Instructors cannot modify locked objects, so any attributes that are locked cannot be edited.


Locked: Content, Points & Due Dates
Locked
Published
Assignment 3: Surf's Up - Beach Analysis
With your group members, analyze the surf and beach zone to explain different types of waves and surf.
You should include media (photos or video) during our field trip for this topic.
Points
5
Assignment Group
Assignments
Display Grade as
Points
Do not count this assignment towards the final grade
Assign
Assign to
Everyone
Due
Aug 17 at 11am
Available from
Until

How do I sync course content in a blueprint course as an admin?

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

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

Content Sync

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

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

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

Content State

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

Modules Exceptions

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

The following sync exceptions apply for Modules content:

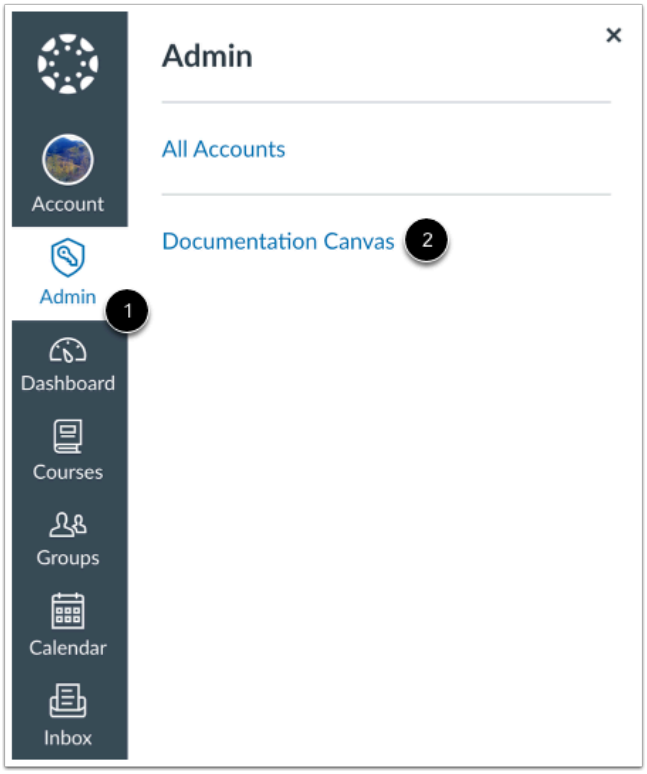
- Associated courses match the modules structure initially created in the blueprint course. Any additional modules and their content added to the blueprint course and synced to associated courses will always be added to the bottom of the Modules page in the associated courses.
- If modules or module items are rearranged in an associated course, the module order will be updated to match the blueprint course structure in the next sync. If a module item in an associated course is moved to another module, the module item will exist in both modules.

- Modules created from a blueprint course and deleted from an associated course will not be restored in additional course syncs.
- Manually created module items in an associated course will remain in the module but will display above all blueprint synced module items. Imported module items in associated courses will be removed during blueprint sync.
- If a module lock date is added or updated in an associated course, the module setting will be updated to match the module setting in the blueprint course in the next sync.
- If a module prerequisite is added or updated in an associated course, the module setting will be updated to match the module setting in the blueprint course in the next sync.

Notes:

- Changes within Course Settings do not trigger unsynced changes. The course only recognizes unsynced changes when a change is made to course content.
- Instructors in associated courses can view the latest blueprint sync information in Course Settings.
- If an assignment in a blueprint course is muted, the muted status is not synced to the same assignment in associated courses.
- Blueprint courses do not sync certain course settings to associated courses, including term, and course format.

Open Account



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

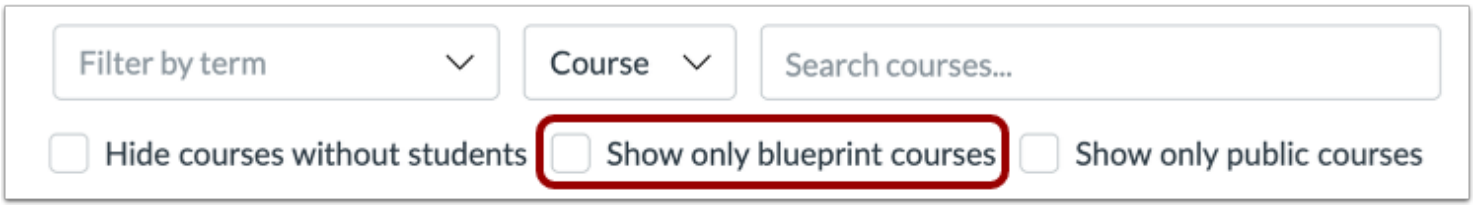
Open Courses



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

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

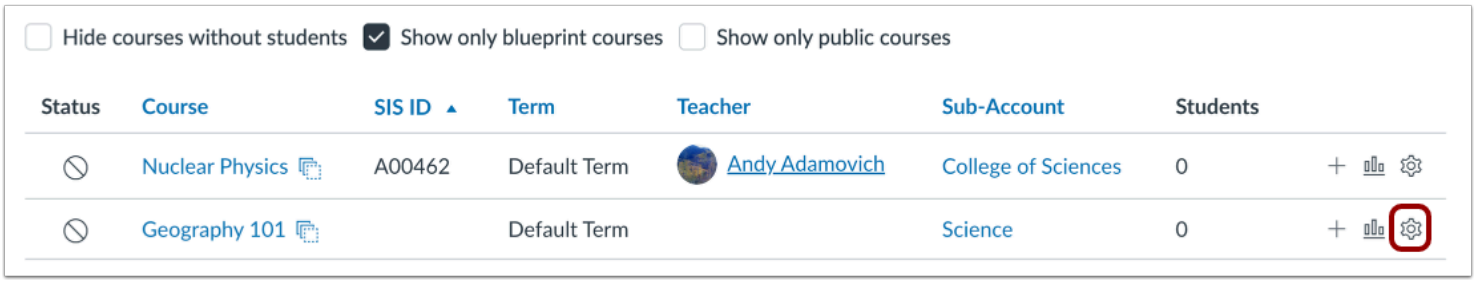
Find Course



To find the course in the account, use the filter and search options.

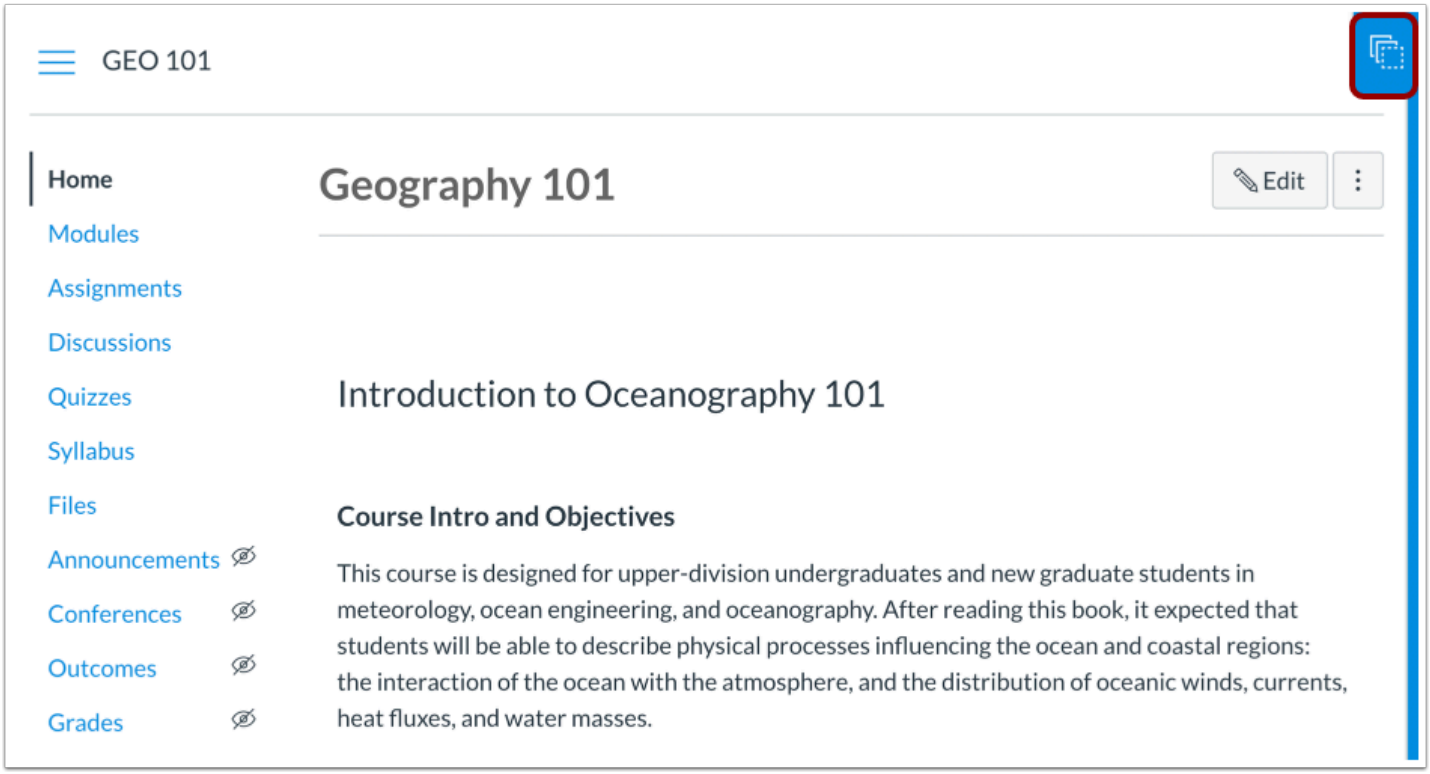
To include only blueprint courses in your search results, click the **Show only blueprint courses** option.

Open Course Settings



In the courses list, click the course **Settings** icon.

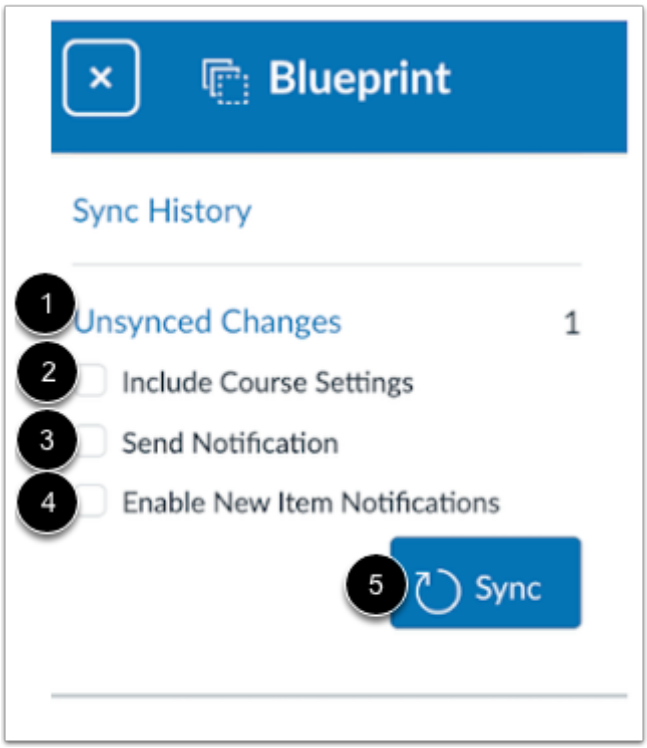
Open Blueprint Sidebar



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

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

View Sidebar

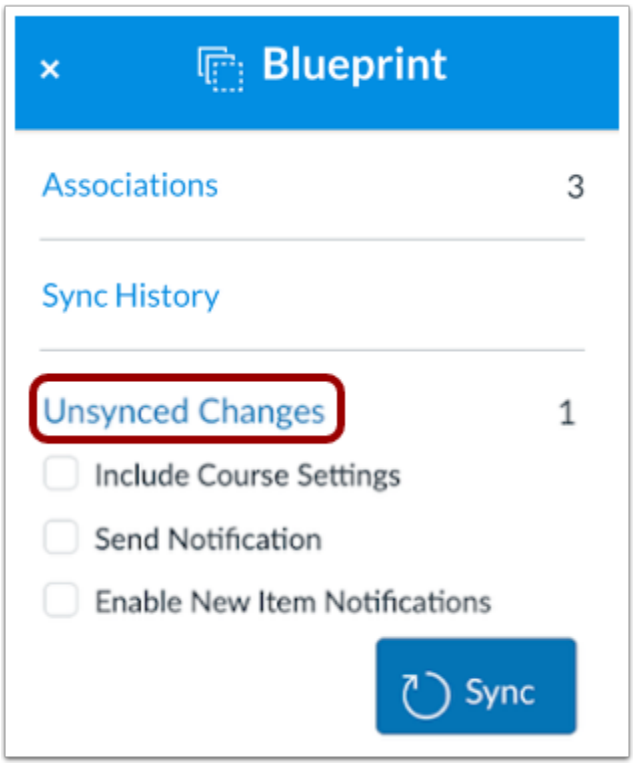


The Blueprint sidebar provides quick access to blueprint sync information.

If any changes have been made in the course, the sidebar displays the number of **Unsynced Changes** in the course [1]. All course content is copied in the sync regardless of whether or not objects are locked. The only exception is **Include Course Settings**, which must be selected on a per-sync basis as part of the sync options [2]. From the sidebar, you can also create and send a notification about the sync [3], or ensure users receive notifications for new announcements [4].

If you know what content is being synced and you are ready to sync your content, you can sync updates directly from the sidebar [5].

View Unsynced Changes



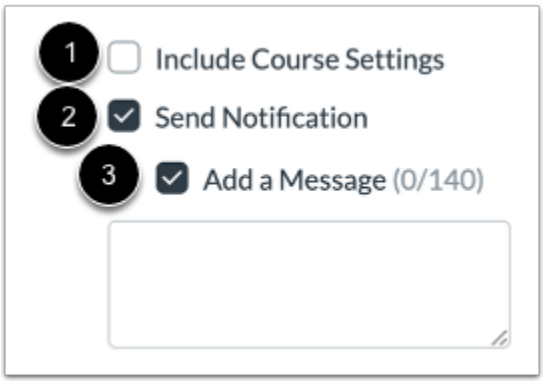
If you are not sure what content is being synced, or if you just want to confirm existing changes in the course, you can view specific details about the unsynced changes by clicking the **Unsynced Changes** link.



The Unsynced Changes page shows the specific content that has been updated. Each content object shows the current status of the object (locked or unlocked) [1], the name of the content item [2], the content change [3], and the content object type [4].

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

Select Sync Options

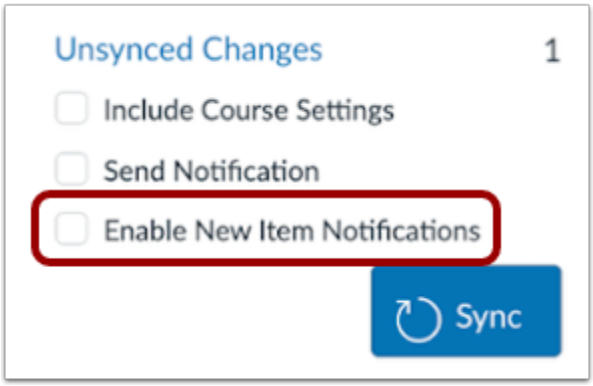


Course Settings include all settings options in the course, including Course Navigation. To sync Course Settings to associated courses, select the **Include Course Settings** checkbox [1].

If you want to send a notification about the blueprint sync, click the **Send Notification** checkbox [2]. Other admins and instructors can set the Blueprint sync notification and receive updates when a sync is complete.

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

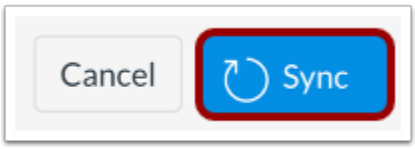
Enable New Item Notifications



To ensure you are notified of new items, click the **Enable New Item Notifications** checkbox.

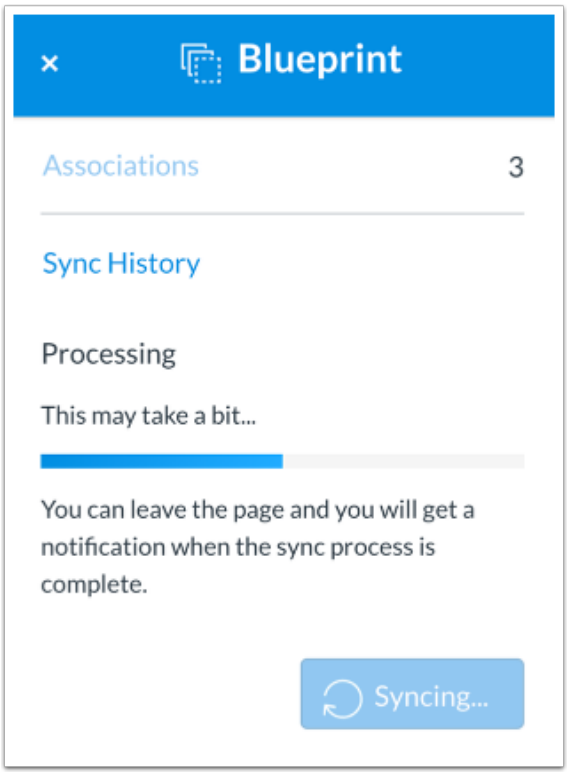
Note: Students must have announcement notifications enabled to receive notifications.

Sync Changes



Click the **Sync** button.

View Sync



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

Notes:

- If you immediately view an associated course and don't see any updates, the sync may still be in process. To confirm sync completion, enable the Blueprint sync notification in User Settings.

- Only Blueprint master course content will sync with associated courses. Content that was manually added or copied using a different format will not sync.

How do I view the sync history for a blueprint course as an admin?

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

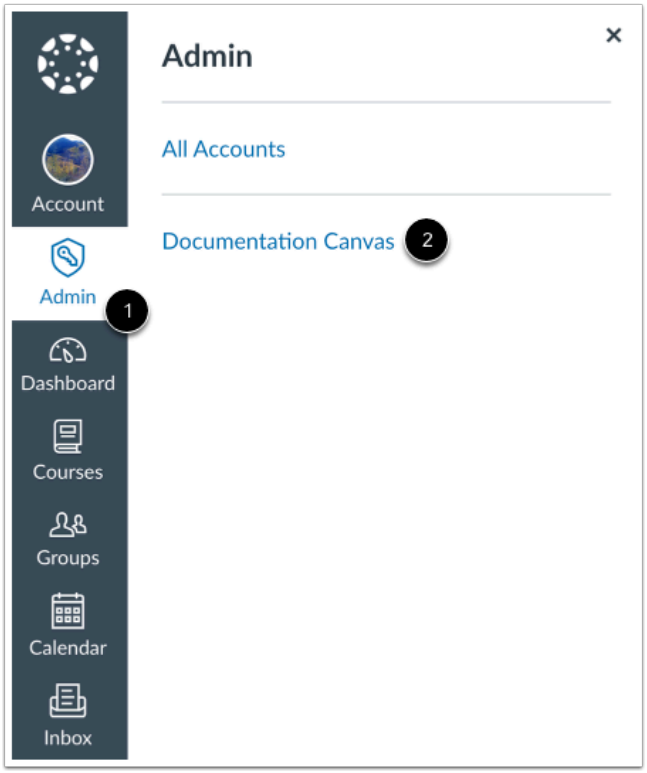
Any instructor who is enrolled in the blueprint course can also make changes and sync content to associated courses. Synced changes from the instructor also display in the Sync History page.

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

Notes:

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

Open Account



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

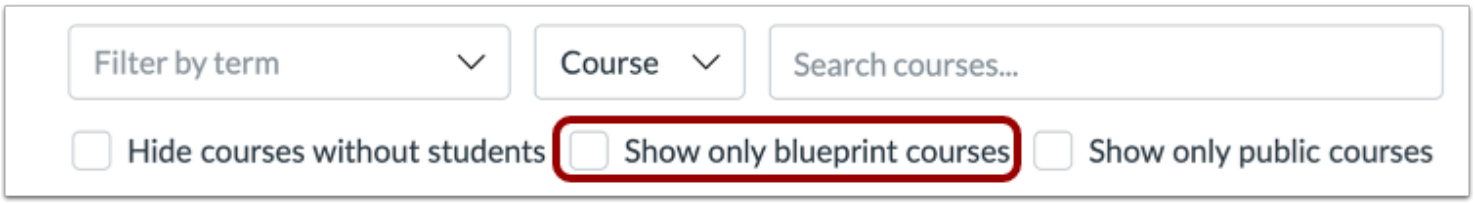
Open Courses



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

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

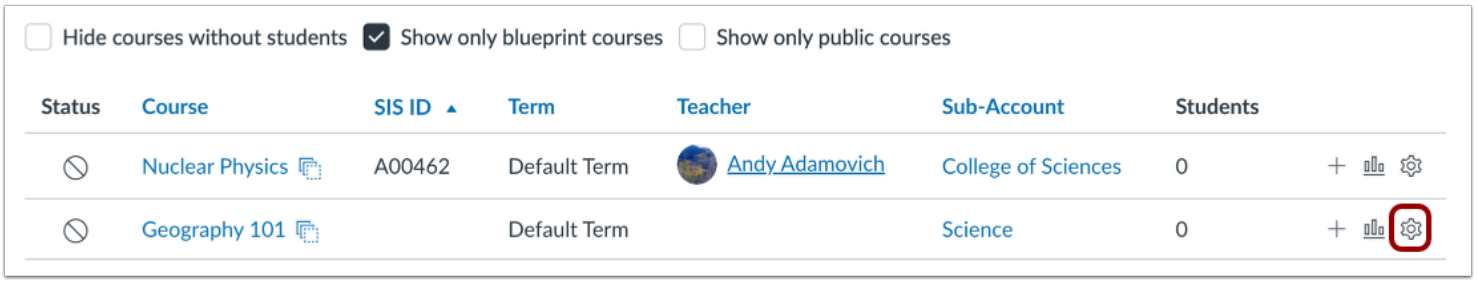
Find Course



To find the course in the account, use the filter and search options.

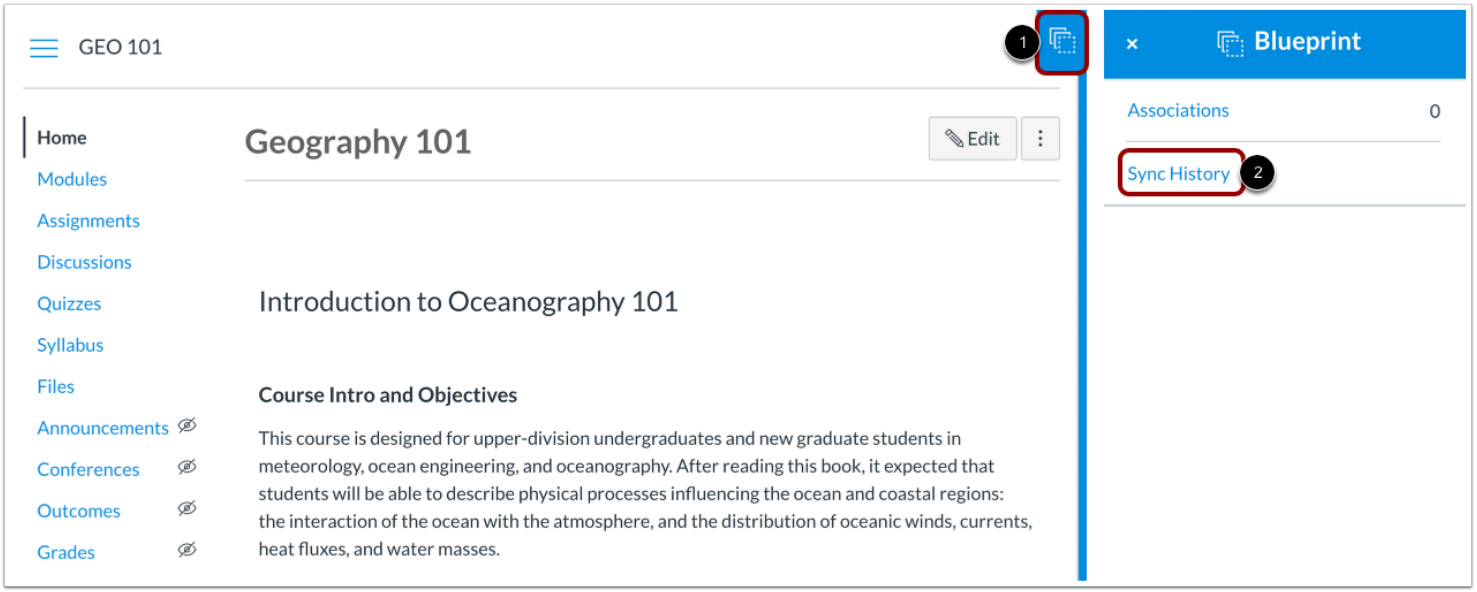
To include only blueprint courses in your search results, click the **Show only blueprint courses** option.

Open Course Settings



In the courses list, click the course **Settings** icon.

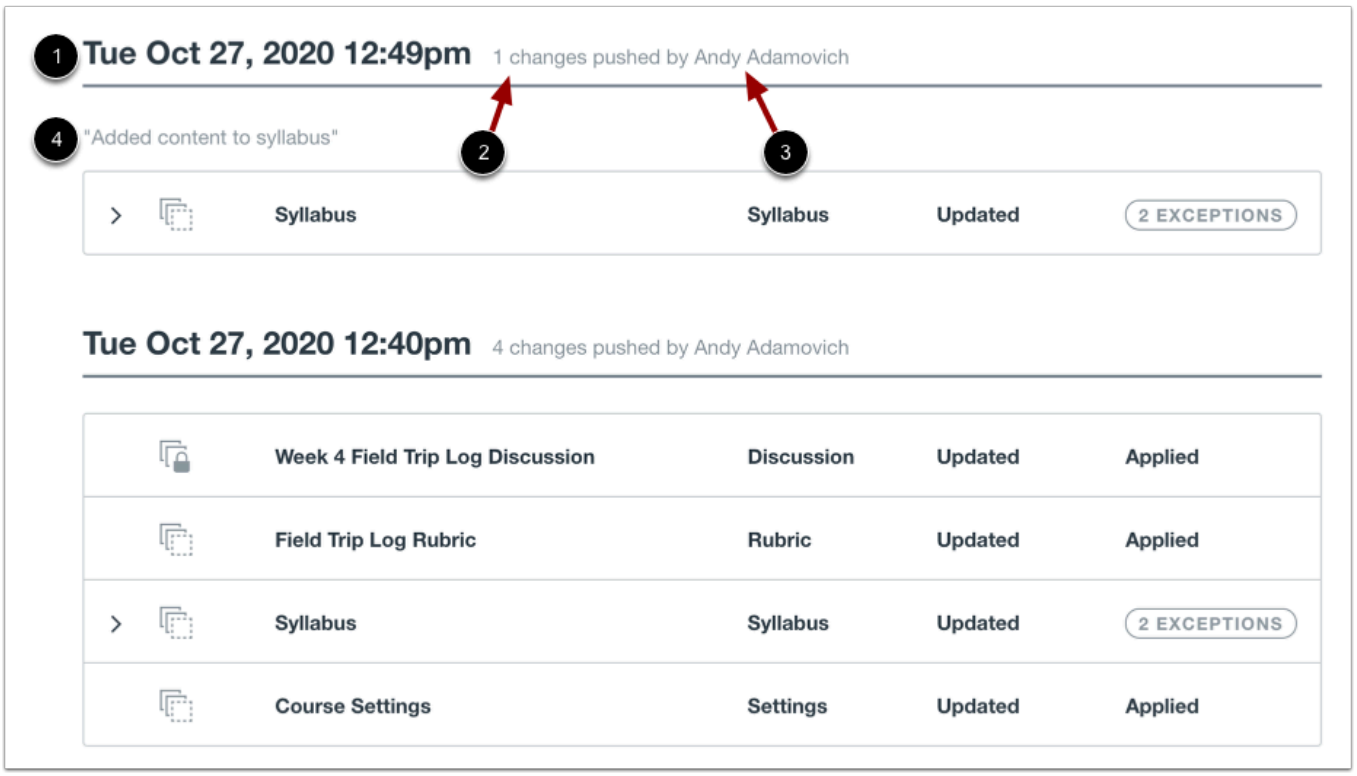
Open Sync History



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

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

View Sync History

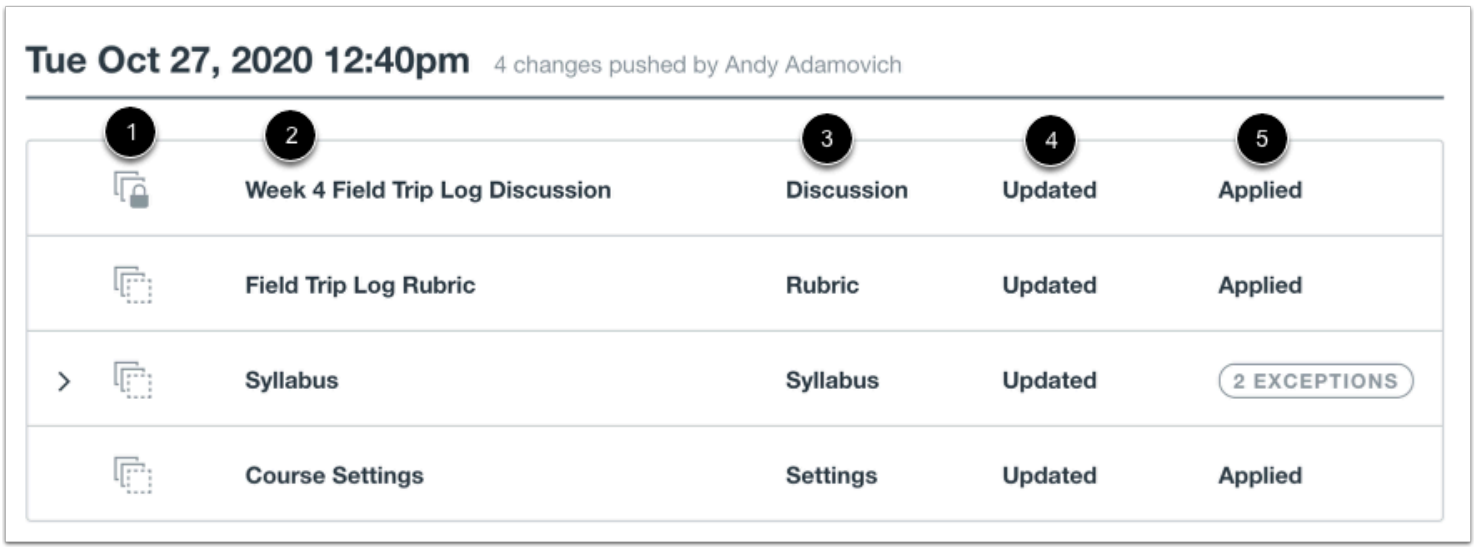


The Sync History page shows information about the last five syncs to the blueprint course. The page displays the date and time of the sync [1], the number of changes [2], and the name of the user who synced the changes [3].

If a message was included as part of the notification, the message is displayed above the list of synced changes [4].

For an initial course association, sync history displays the date and time the sync was made but does not display details related to the sync.

View Sync Details



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

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

View Sync Exceptions



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

An exception is noted by the Exception indicator [1], which includes the number of exceptions.

To view which course(s) had an exception, click the arrow icon next to the name of the content item [2]. The term and name of the course is shown in the expanded details.

Close Sync History



When you are finished with the Sync History page, click the **Done** button.

How do I add a subject in a Canvas for Elementary account as an admin?

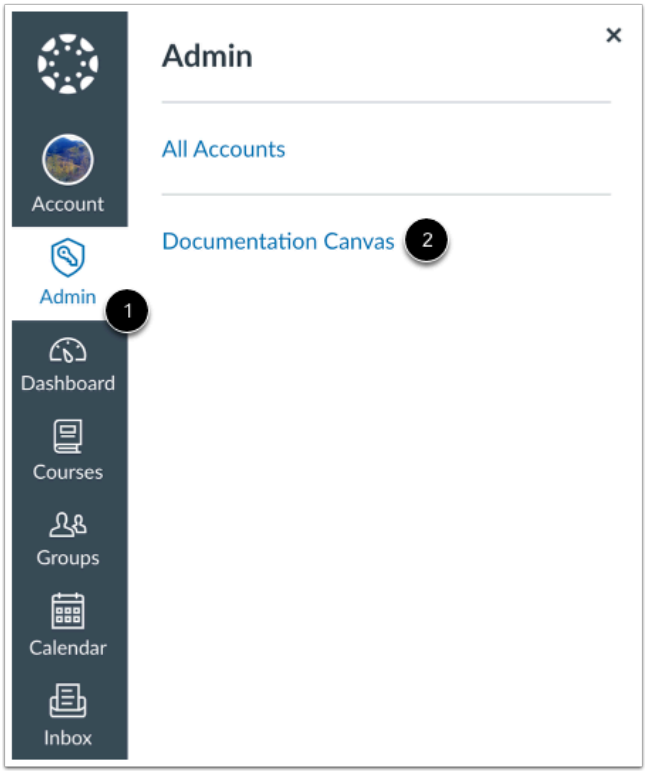
You can manually add subjects in a Canvas for Elementary account in the Courses page.

If a course template has been selected in your Canvas for Elementary account, content from the selected subject will be copied into your new subject. Course copies may not include all content. For more details, please view the course import lesson. Creating a subject from a course template does not impact file quotas.

Notes:

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

Open Account



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

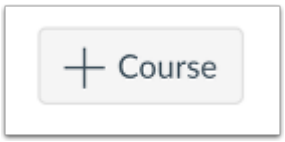
Open Courses



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

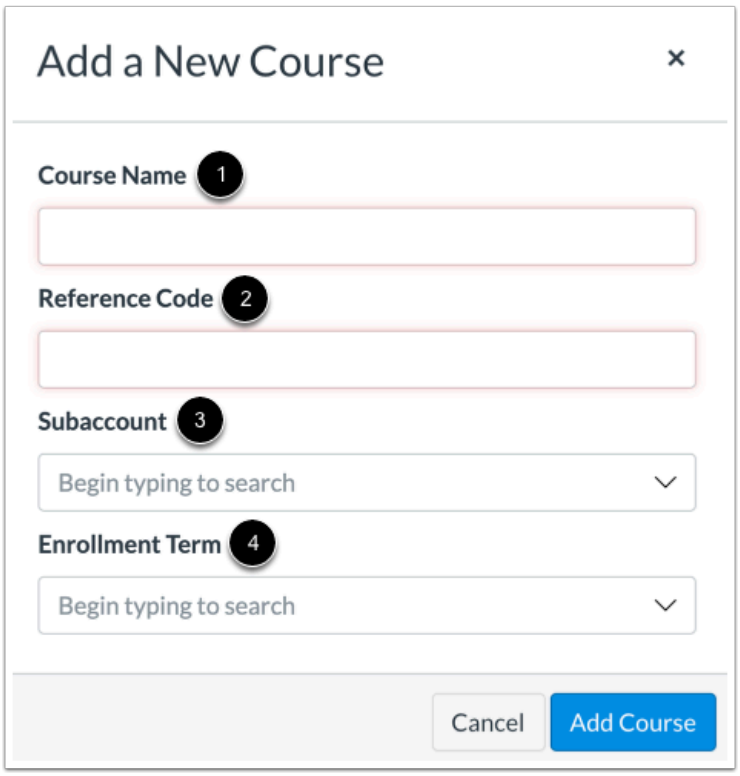
Note: When you open an account, the account defaults to the Courses page.

Add Subject



Click the **Add Course** button.

Add Subject Details



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

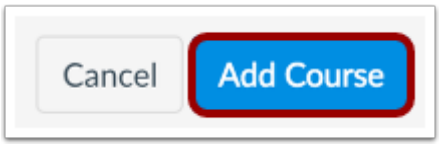
In the **Reference Code** field [2], create a reference code for the course. The reference code is also known as the short name or course code, is displayed as part of a student's course card in the Dashboard, and is referenced in the account Courses page.

In the **Subaccount** menu [3], select a Canvas for Elementary sub-account. You can type the name of a sub-account to search sub-accounts or select a sub-account from the drop-down menu.

Admins who manually create Canvas for Elementary subjects are automatically enrolled as an instructor in the subject. The Subaccount menu displays subaccounts in which the admin has enrollments as an instructor.

In the **Enrollment Term** menu [4], select the term you want to associate with the subject. You can type the name of a term to search terms or select a term from the drop-down menu. Menu options are based on the terms already created in your account.

Add Subject

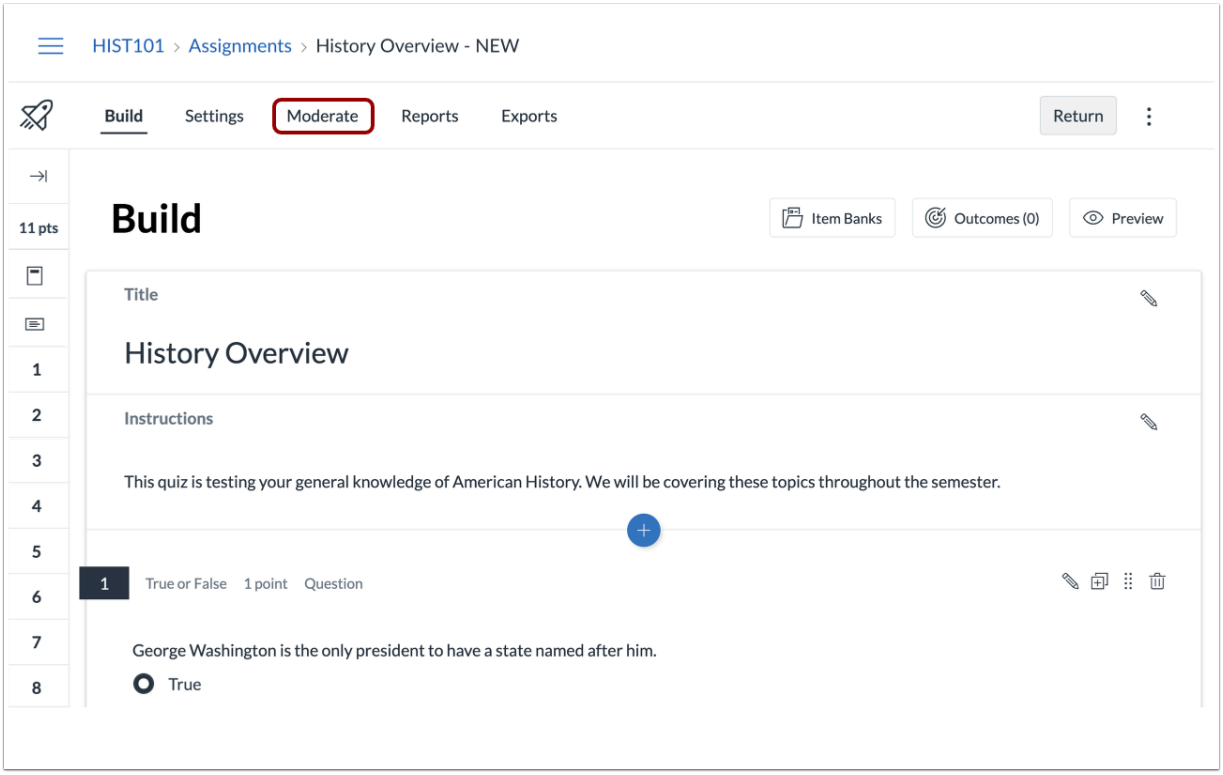


Click the **Add Course** button.

How do I view multi-session details in New Quizzes as an admin?

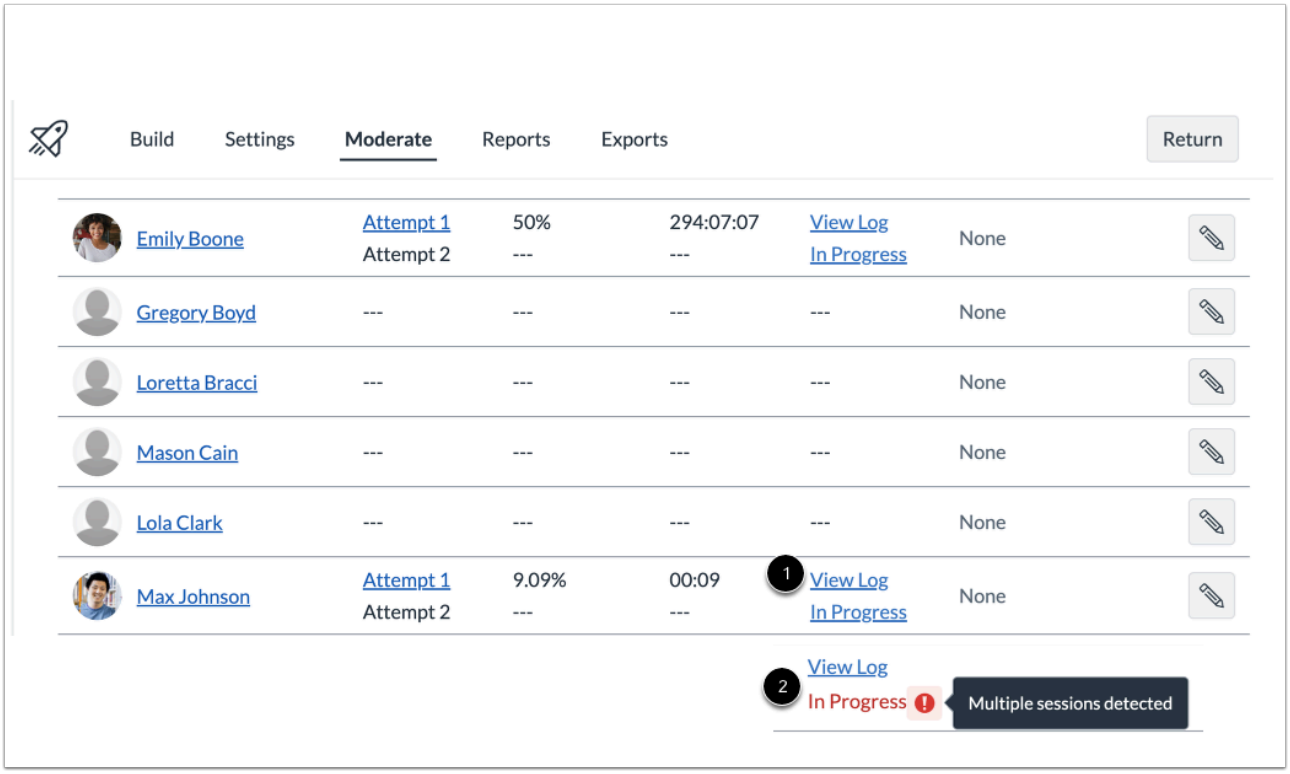
As an admin, you can view detailed student activity in New Quizzes, including client IP addresses for quiz questions and information about multiple session access. This activity is recorded and can be viewed in the Moderate page.

Open Moderate



From the Build page, click the **Moderate** tab.

View Activity Log

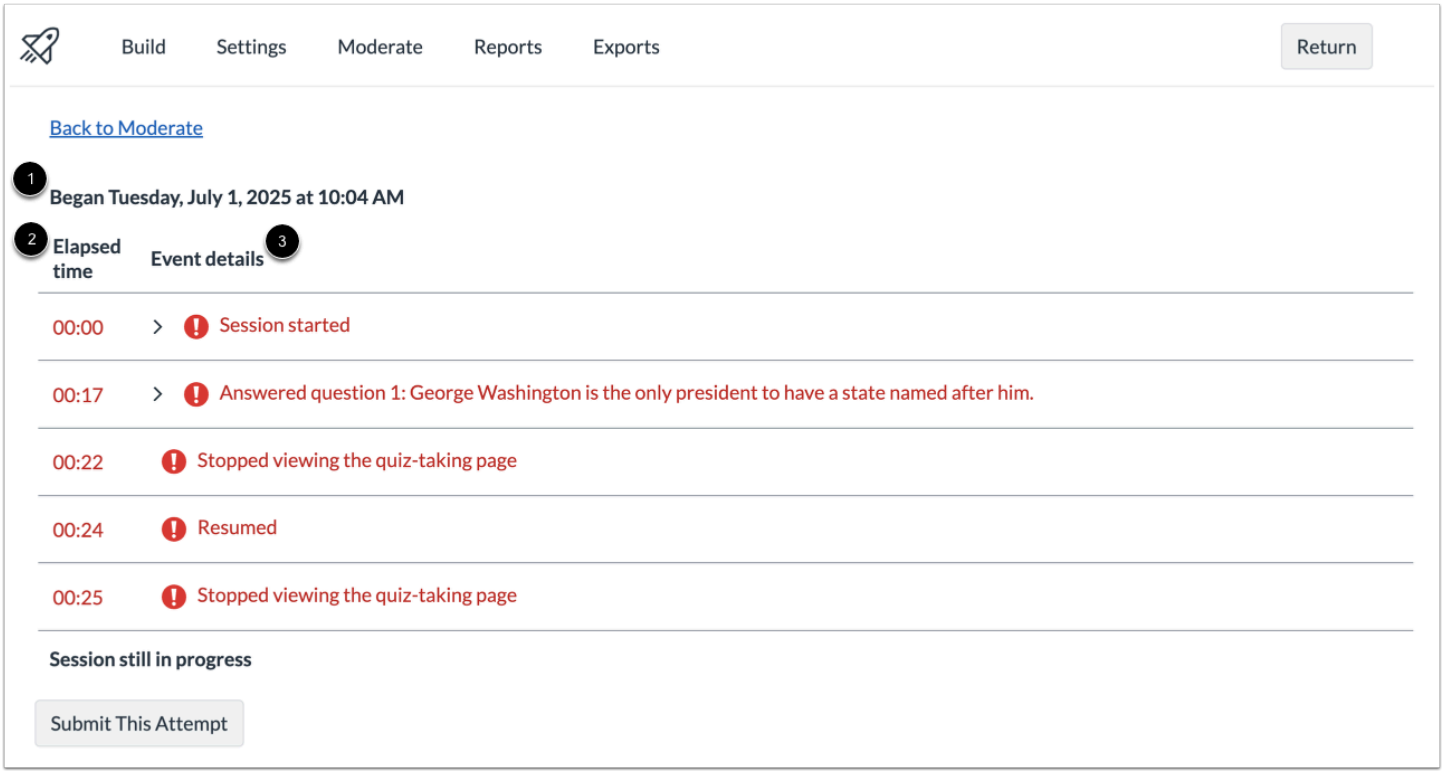


To view the student's activity log for each quiz question, click the **View Log** link [1].

If the student is currently taking the quiz and they are using multiple browsers or devices, the In Progress link and warning icon displays. To view the multiple sessions details, click the **In Progress** link [2].

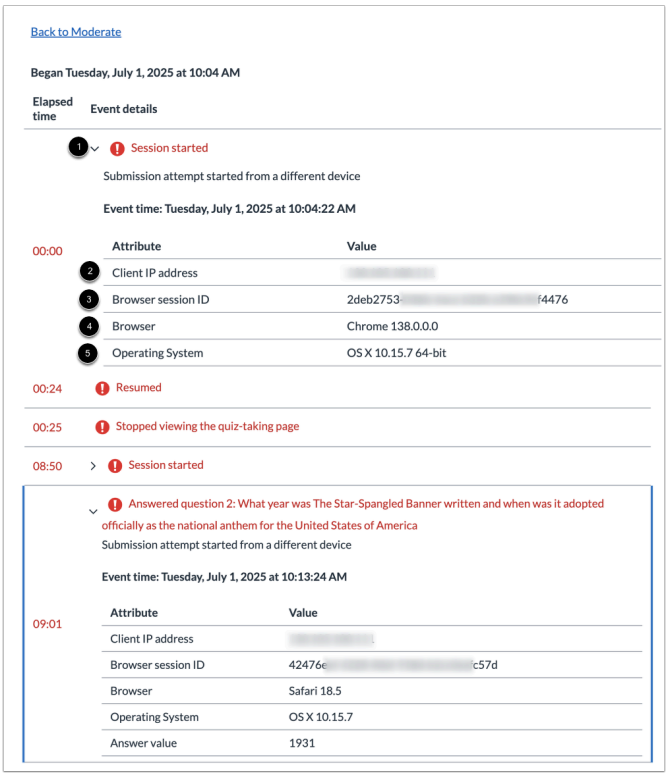
Note: For multi-session activity to be recorded and viewable, the Detect Multiple Sessions setting must be enabled by the instructor within the quiz settings. The multi session details can only be viewed by admins.

View Multiple Sessions Details



The Activity Log page displays the start date and time [1], Elapsed time [2], and Event details [3].

View Event Details



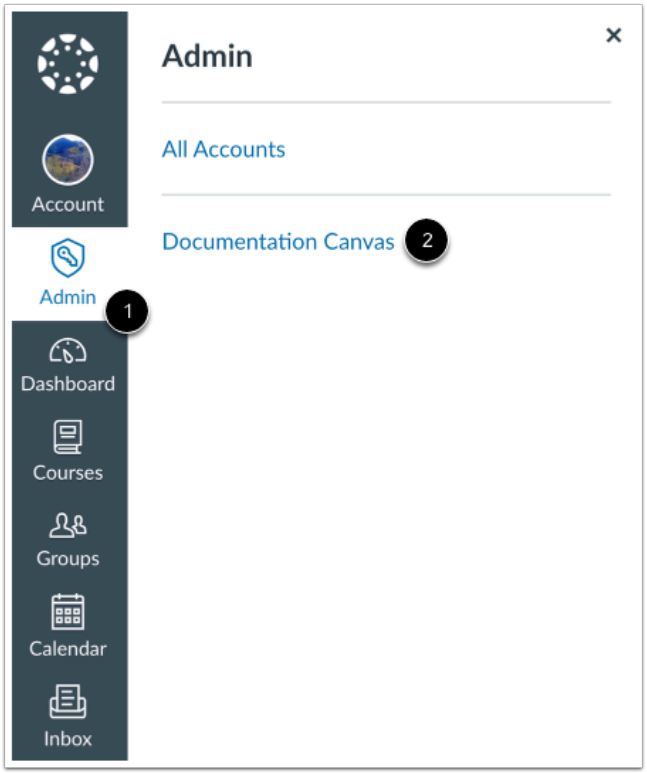
To view the event details, click the **Expand** icon [1]. The Event details displays the Client IP address [2], Browser session ID [3], Browser [4], and Operating System [5].

External Apps (LTI)

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

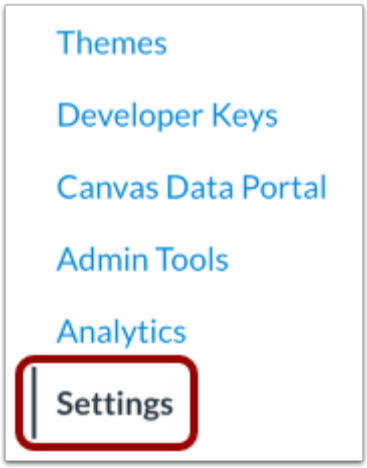
The Edu App Center is your gateway to powerful teaching tools that are easily integrated into a Canvas account or Canvas course. In the Edu App Center, you can specify which external applications will integrate with your Canvas account. Tools available at the account level are also available to all the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

Open Account



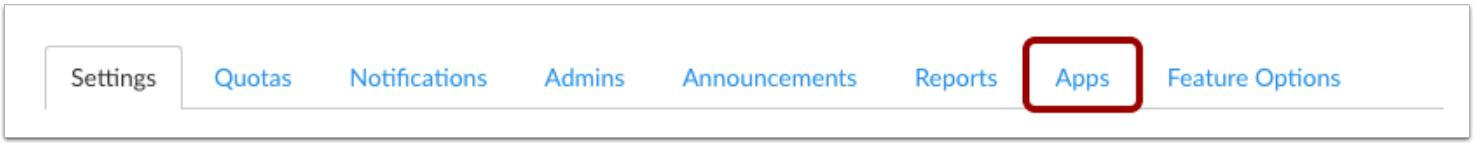
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



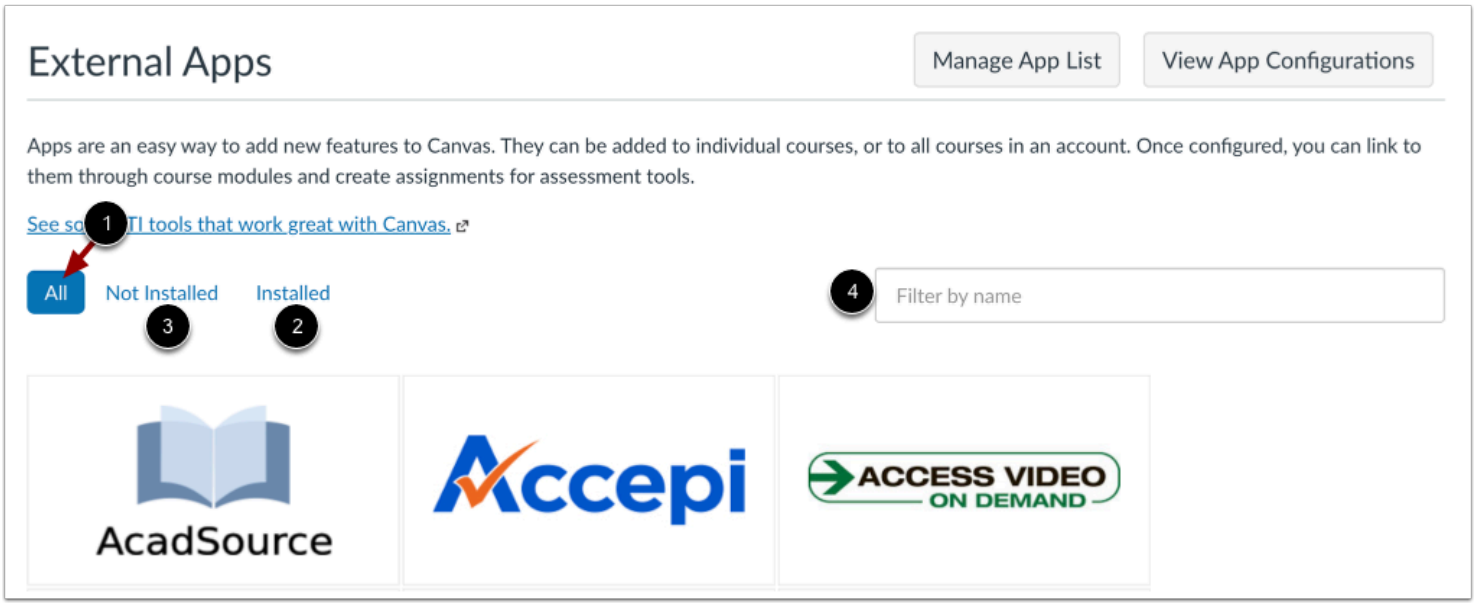
In Account Navigation, click **Settings** link.

Open Apps



Click the **Apps** tab.

View EduAppCenter



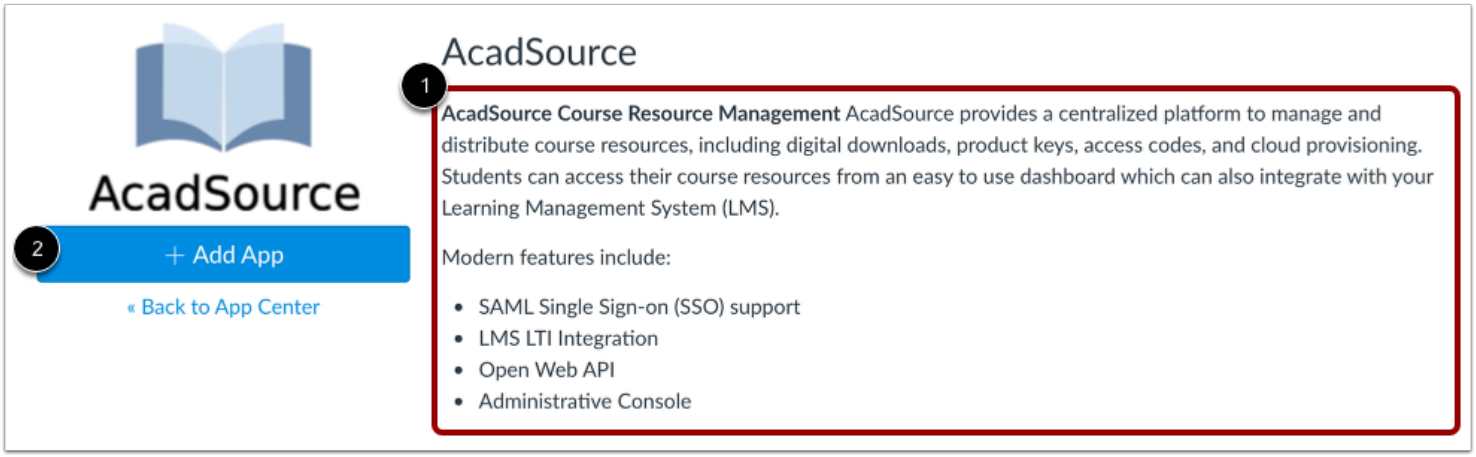
The Edu App Center shows all apps available in your account [1]. You can also filter by installed [2] and not installed [3], or use the search field to locate a specific app [4].

View App



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

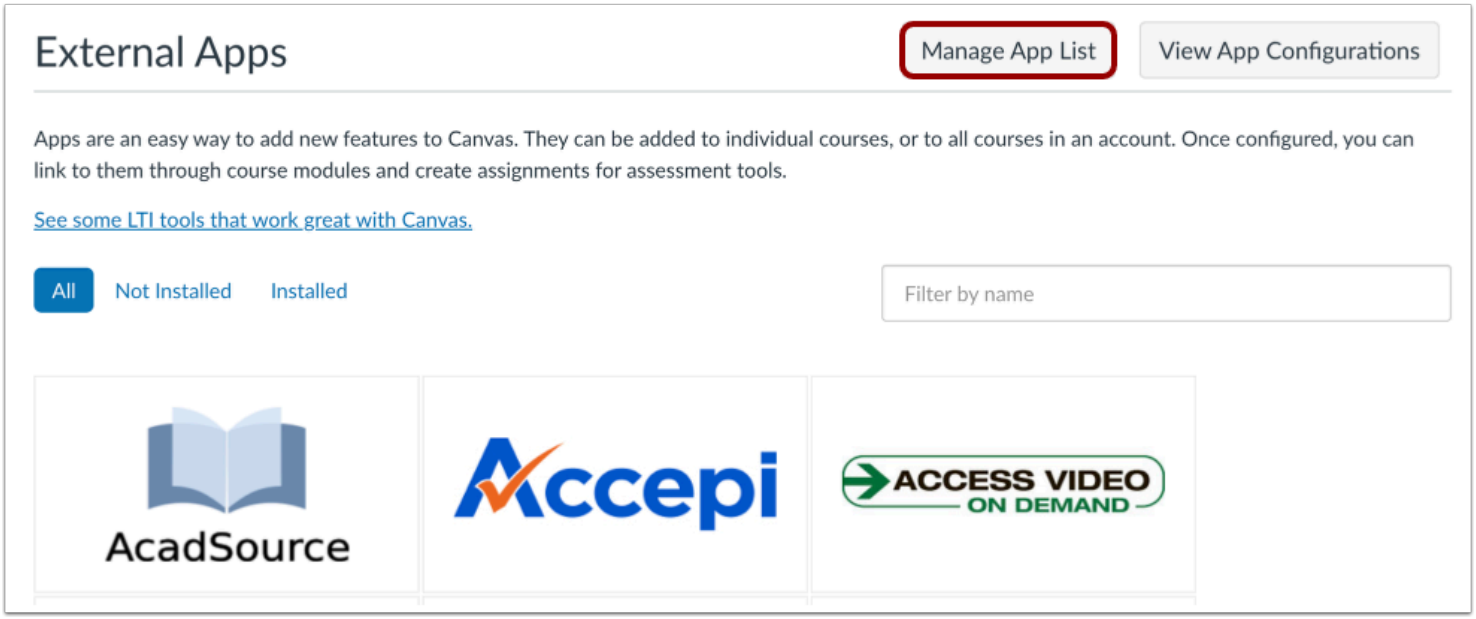
View App Details



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

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

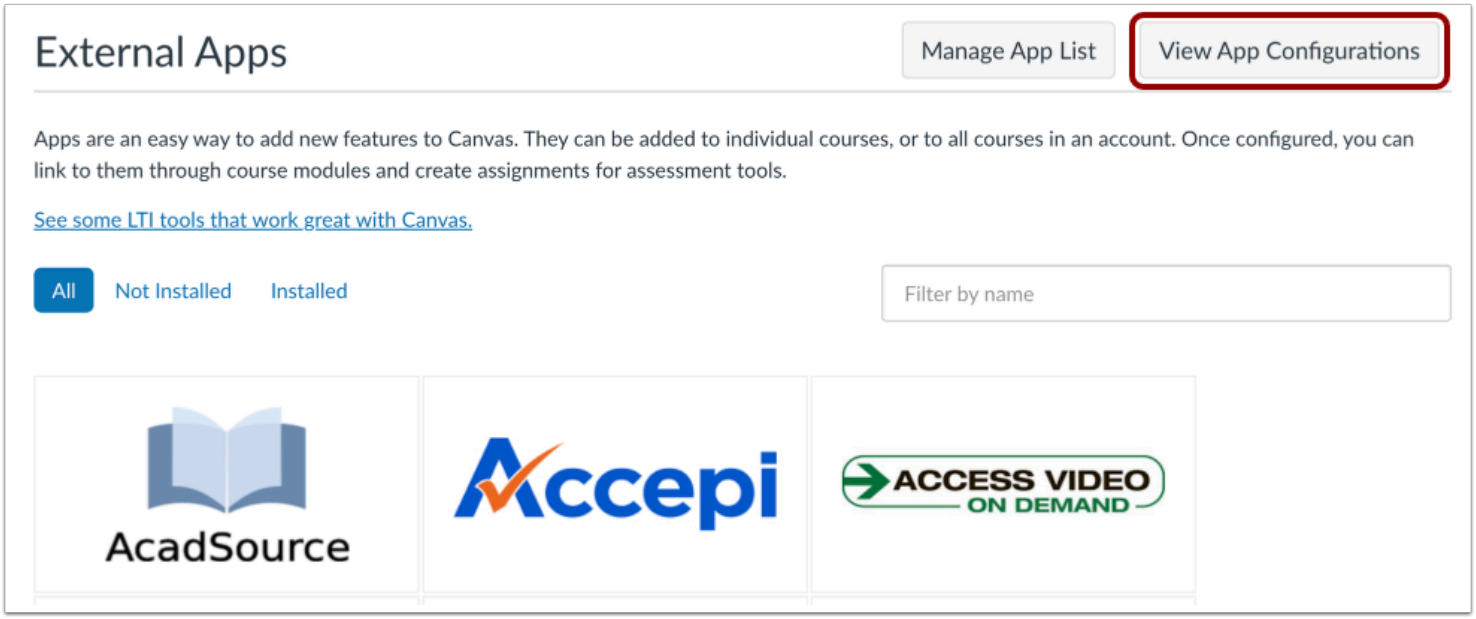
Manage App List



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 allowed apps from the Edu App Center set up for the organization.

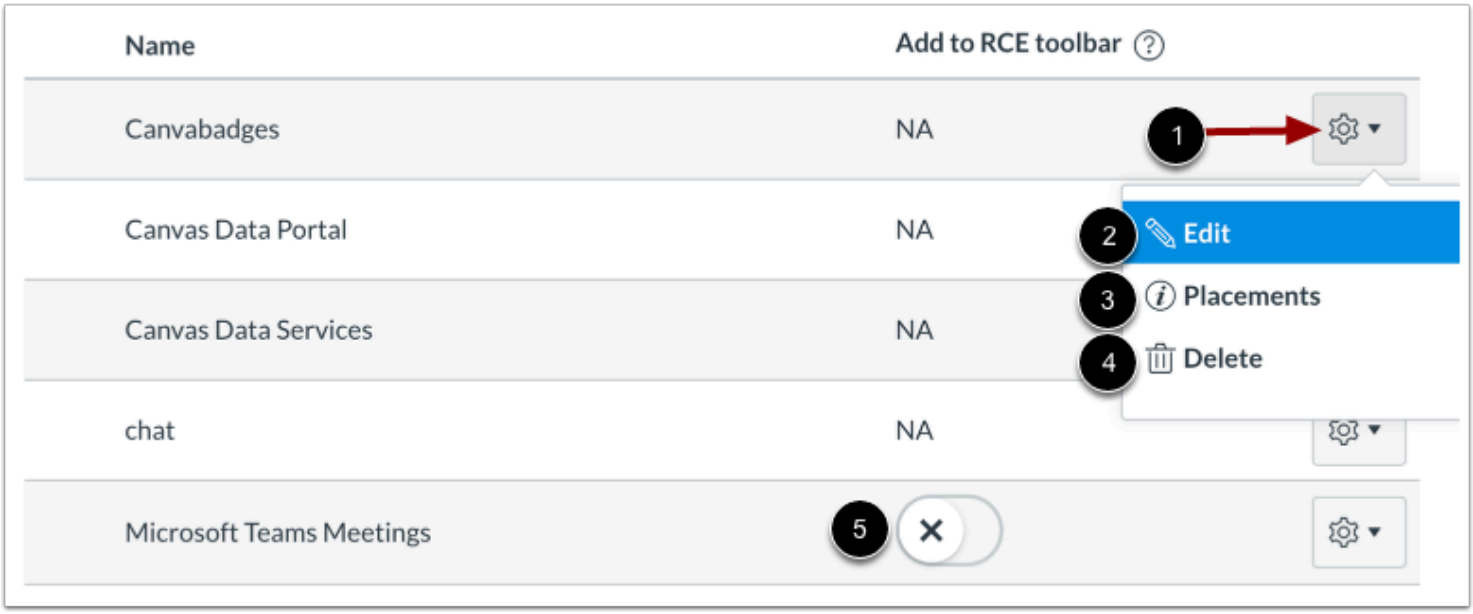
Note: To access the Manage App List button in the Apps tab in Account Settings, you must have the Manage LTI permission enabled.

View App Configurations



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

Manage Apps

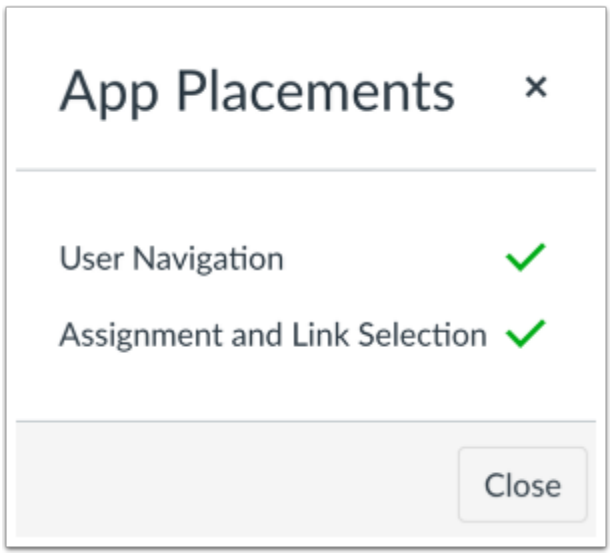


To view configurations for an external app, click the app's **Settings** icon [1]. To edit the app, click the **Edit** link [2]. To view placements for the app, click the **Placements** link [3]. To delete the app, click the **Delete** link [4].

To add an external app to the Rich Content Editor toolbar, click the **Add to RCE toolbar** toggle [5].

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

View App Placements



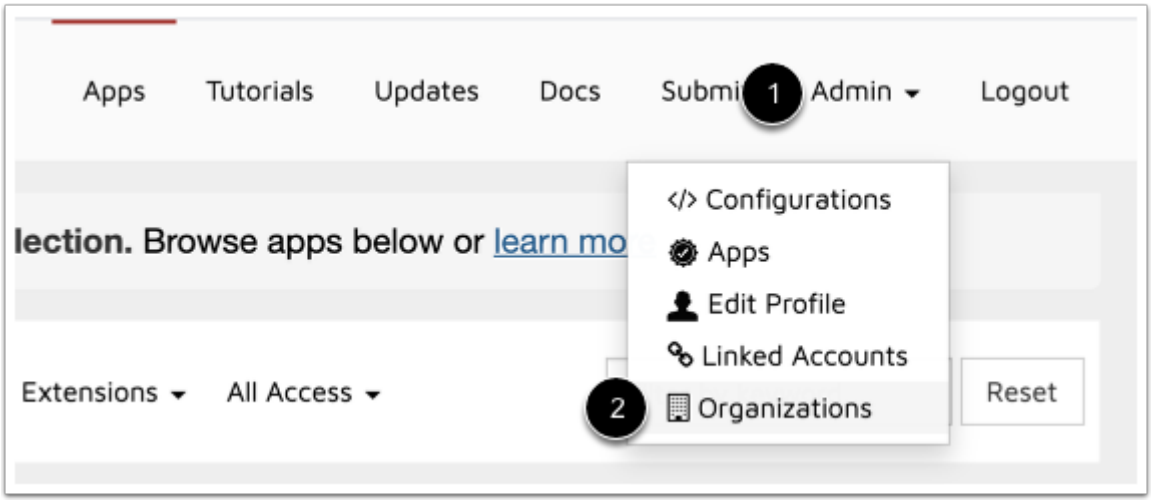
App Placements shows the places in Canvas where your app can be used, including navigation menus, LTI assignments, Rich Content Editor buttons, and module links. You can manage external app placements for your account.

Note: You may see a No Placements Enabled message. This message indicates that the app does not have any specified placements within Canvas. However, the app will still work as intended.

How do I create and manage organizations in the Edu App Center?

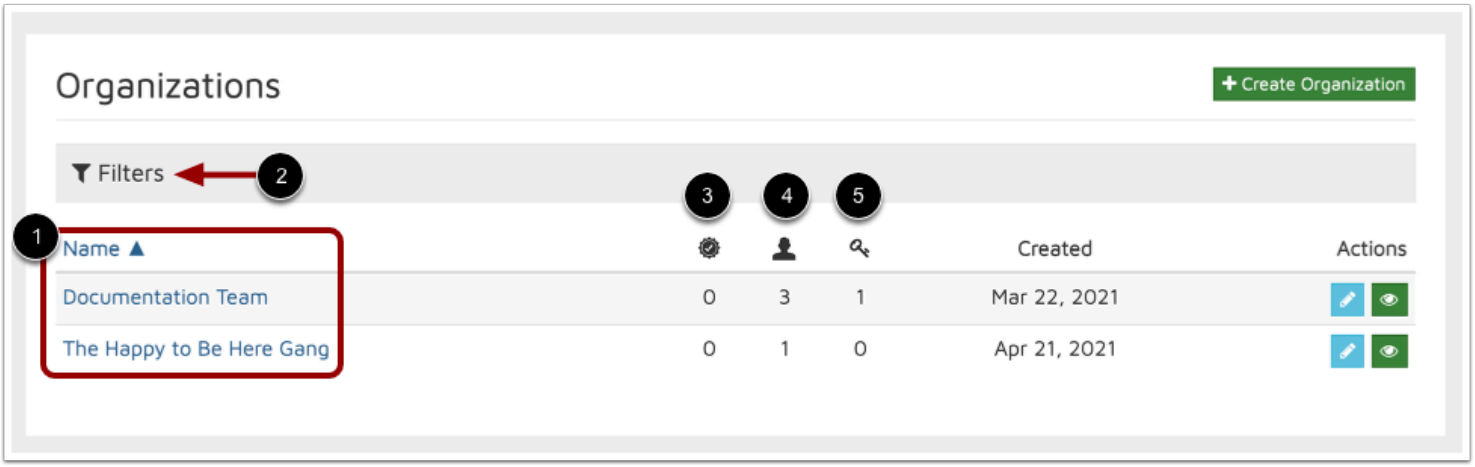
In the Edu App Center, you can create organizations. Each organization can have its own allow list and App Center tokens. You can also add members and administrators to an organization.

Open Organizations



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

View Organizations



View the organizations in your account [1]. To filter organizations by name, click the **Filters** link [2].

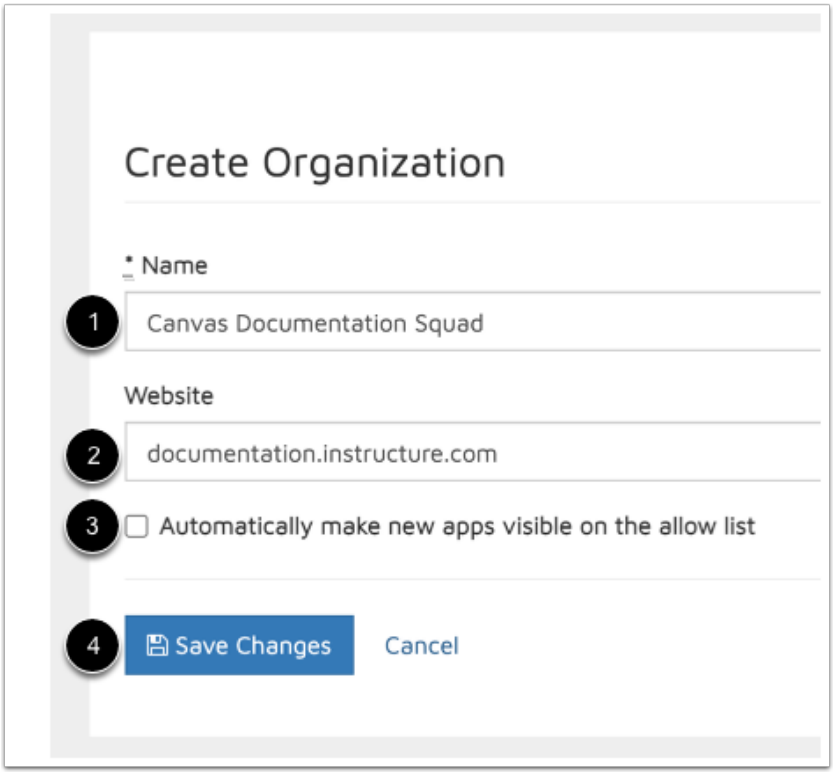
Each organization displays the number of apps [3], members [4], and administrators [5].

Create Organization



To create a new organization, click the **Create Organization** button.

Enter Information

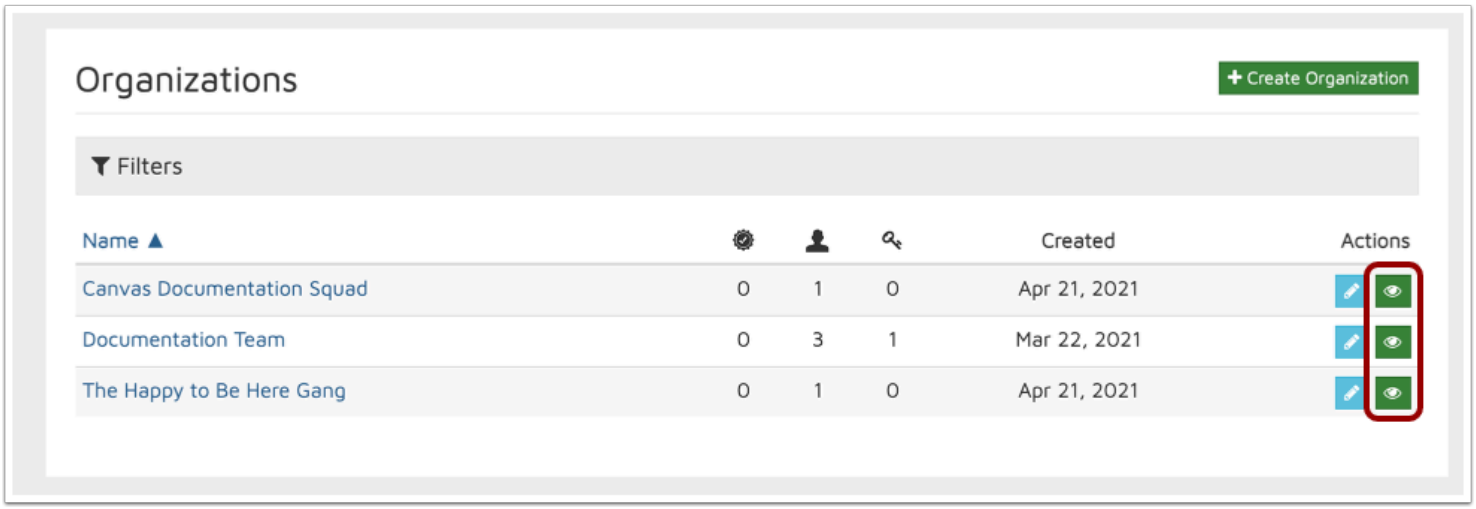


Enter your organization name in the **Organization Name** field [1] and website URL in the **Website** field [2].

To display new apps by default, click the **Automatically make new apps visible on the allow list** checkbox [3].

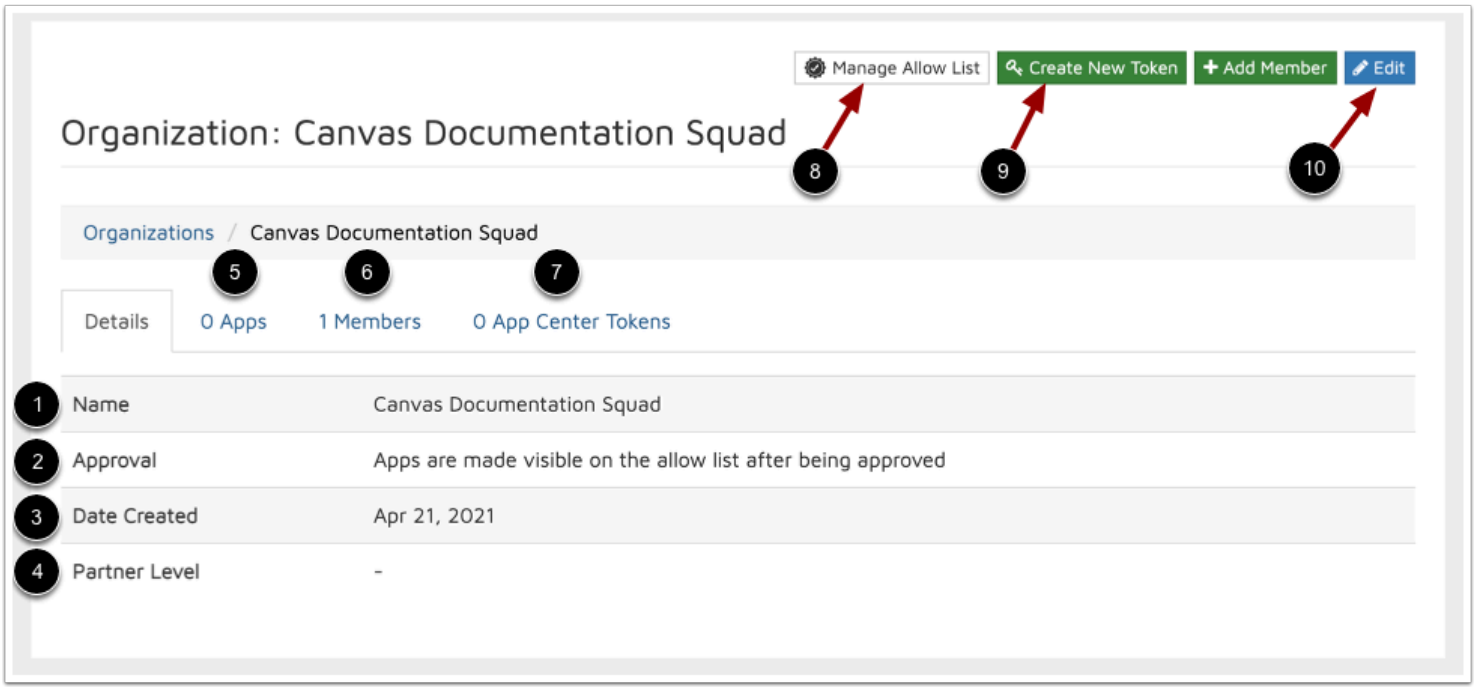
Click the **Save Changes** button [4].

Open Organization Details



To view more information about an organization, click the **View Organization** button.

View Details



From the Details page, you can view the the organization's name [1], approval status [2], date created [3], and partner level [4].

To view app information, click the **Apps** tab [5]. To view organization members, click the **Members** tab [6]. To view App Center tokens, click the **App Center Tokens** tab [7].

To manage your allow list, click the **Manage Allow List** [8]**.** button. To create a new app token, click the **Create New Token** button [9].

To edit organization details, click the **Edit** button [10].

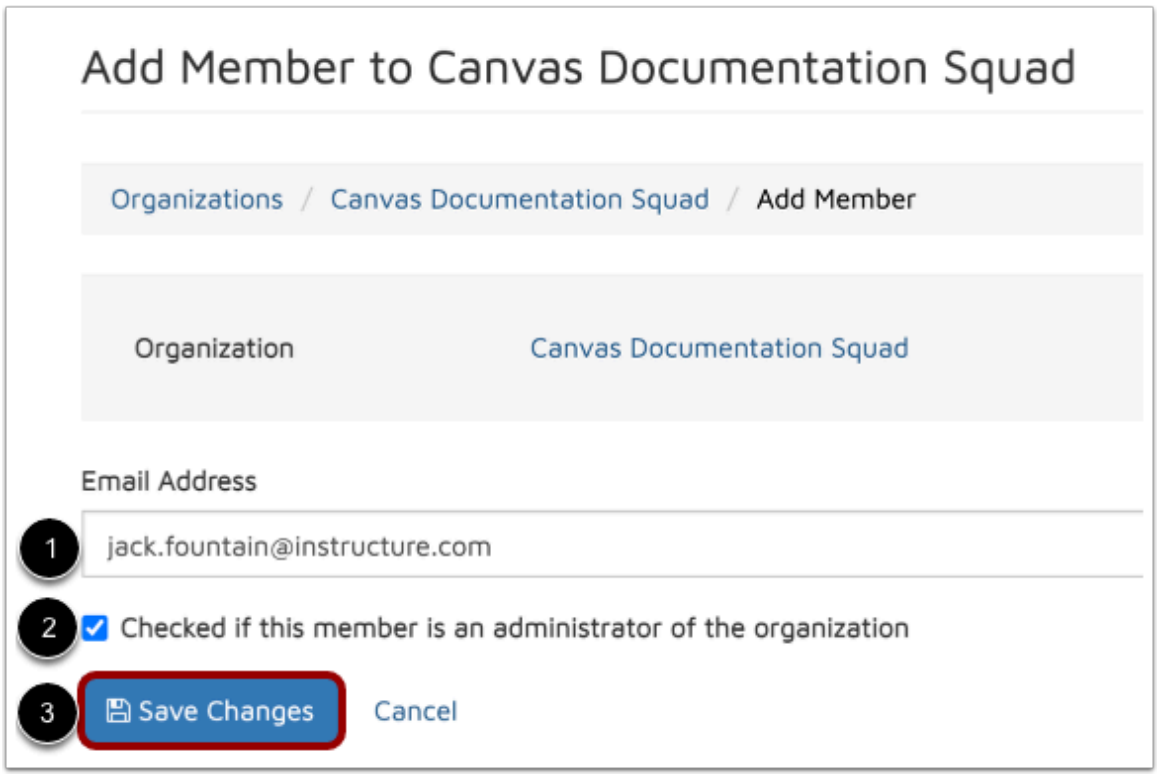
Note: When an invalid access token is inputted into the Edu App Center, no tools display.

Add Member



To add a member to your organization, click the **Add Member** button.

Enter Member Details



Enter the email address for the member in the **Email Address** field [1]. To designate the member as an administrator, click the **Checked if this member is an administrator of the organization** checkbox [2].

To add the member to your organization, click the **Save Changes** button [3].

How do I manage an allow list in the Edu App Center?

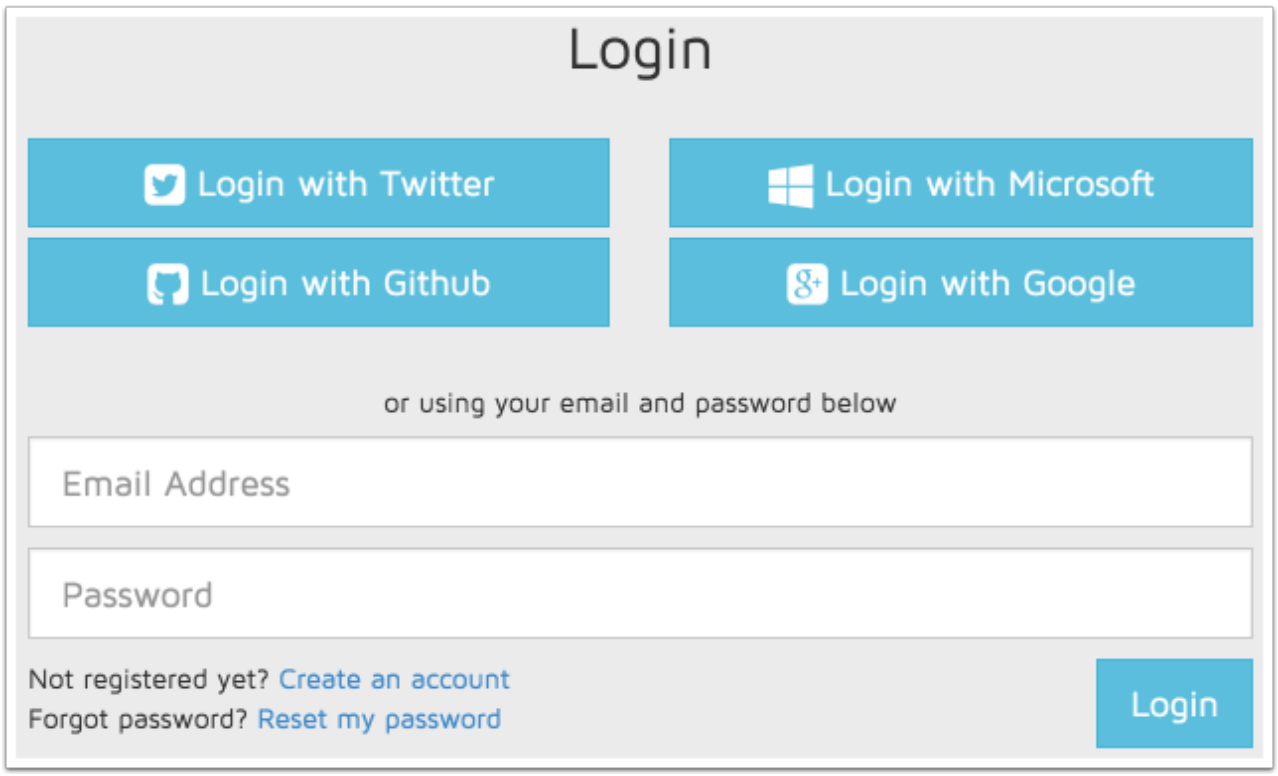
The Edu App Center allows you to create an allow list of external apps for your institution. After you have created an allow list, you can manage your allow list in Canvas and only display approved external apps to courses in your account and subaccounts.

Note: Apps added to an EduAppCenter allowlist may take up to 24 hours to display in Canvas.

Log in to Edu App Center

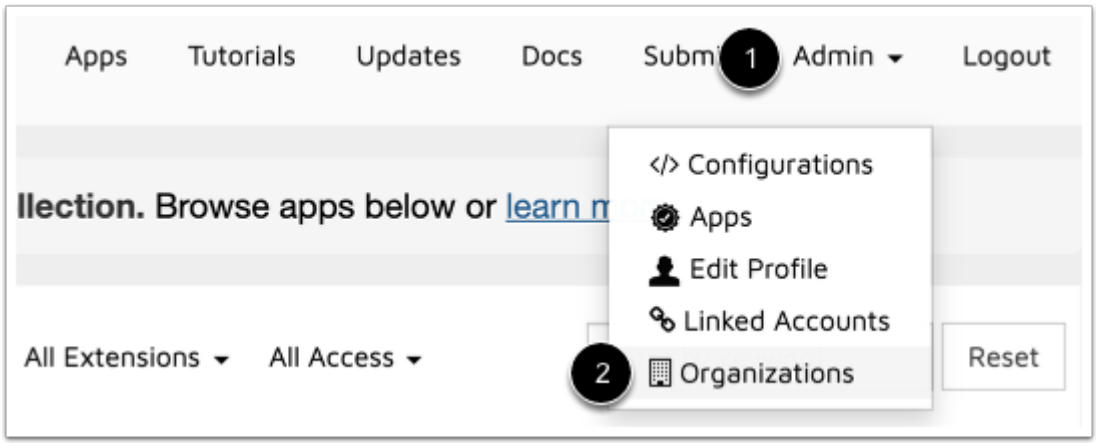


In the browser's search bar, type eduappcenter.com and click the **Login** link.



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

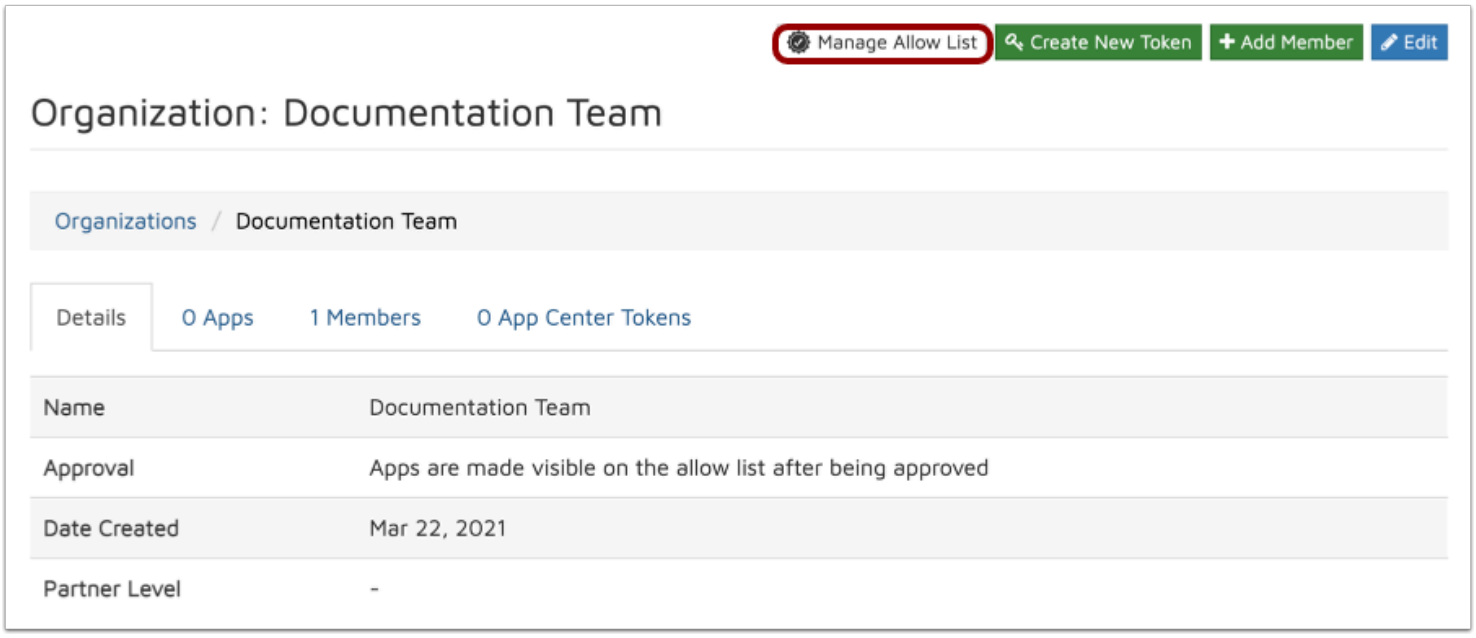
Open Organizations



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

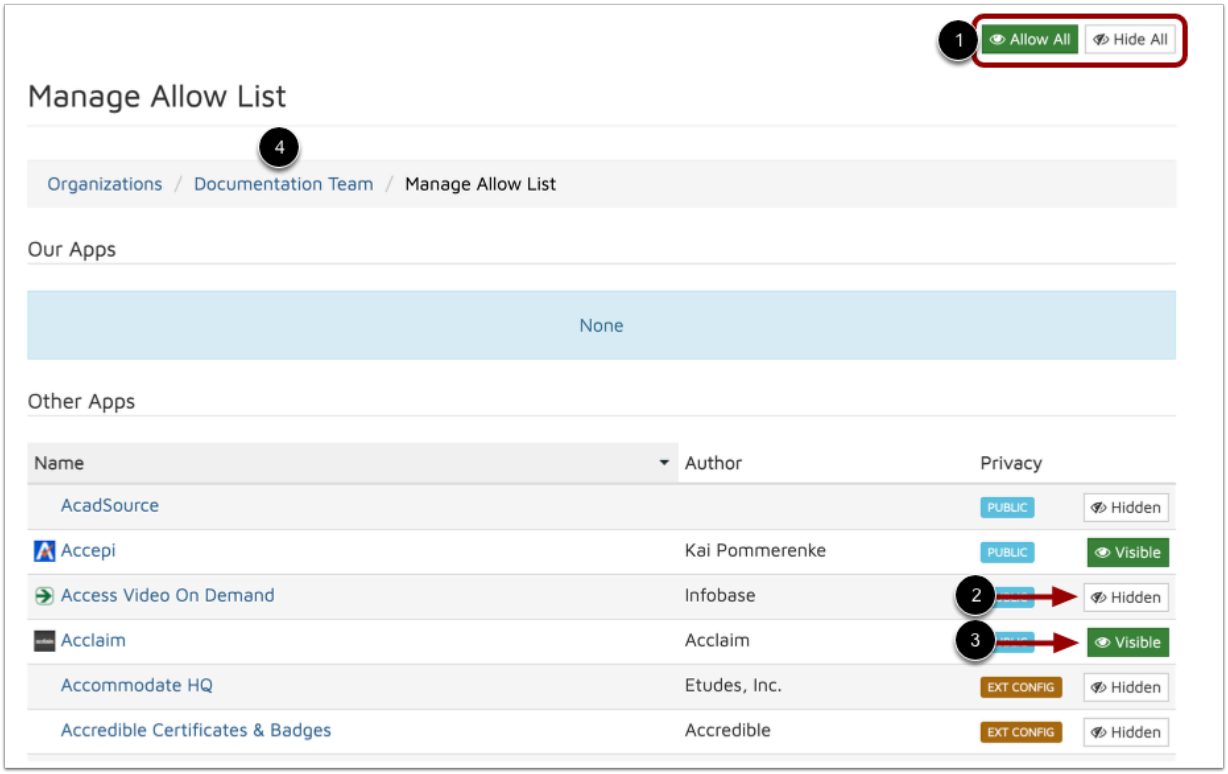
Note: For more information on creating and managing organizations, visit How do I create and manage organizations in the Edu App Center?

Manage Allow List



Click the **Manage Allow List** button.

Manage Apps



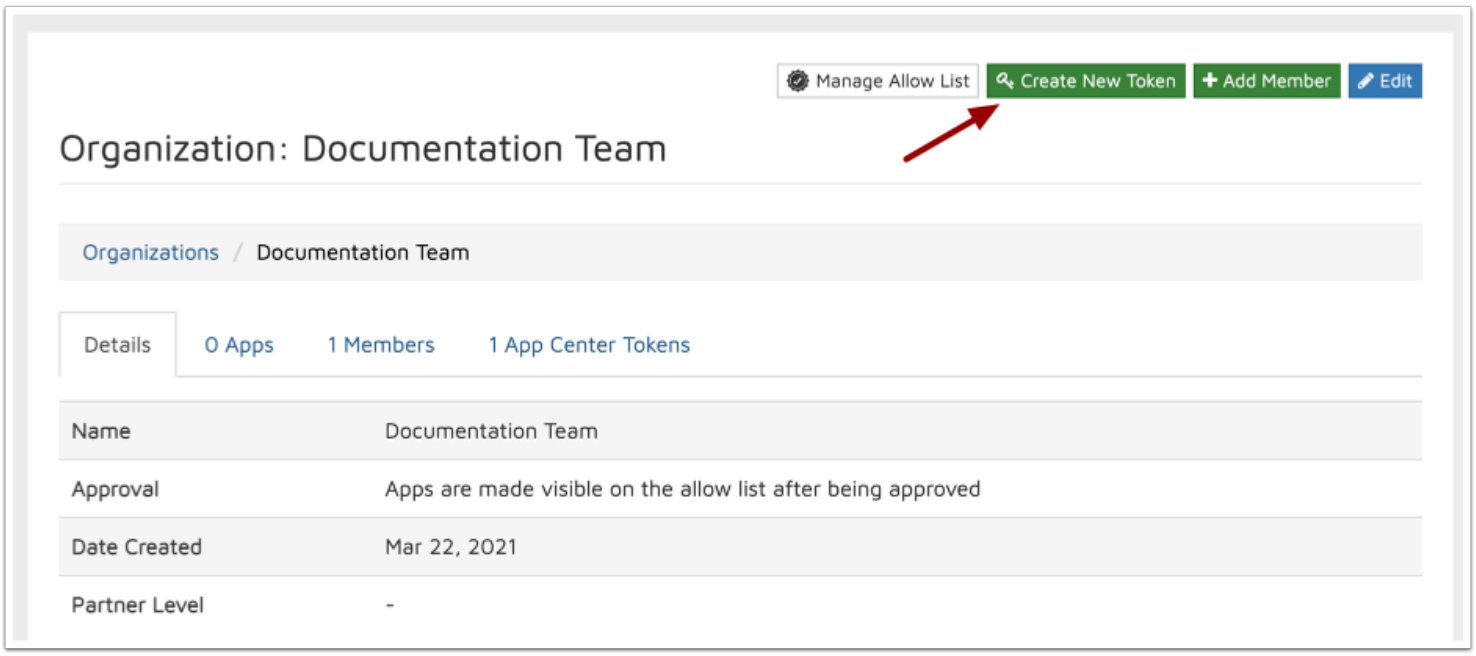
By default, all apps are hidden. Hidden apps do not display in the app center list. You can show or hide all apps by clicking the **Allow All** or **Hide All** buttons [1].

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].

Note: Apps added to an EduAppCenter allowlist may take up to 24 hours to display in Canvas.

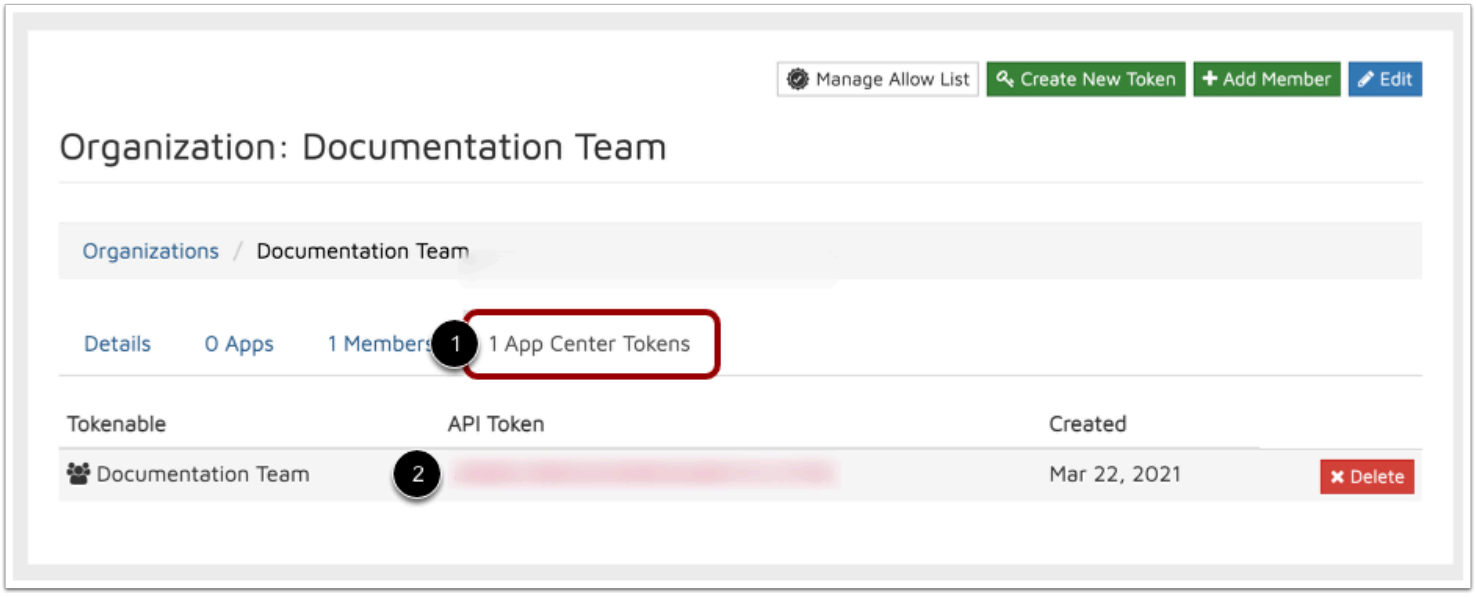
Create New Token



To create an API Token, click the **Create New Token** button.

Note: When an invalid access token is inputted into the Edu App Center, no tools display.

Share API Token



To view your app token, click the **App Center Tokens** tab [1].

Copy the API token to use for your allow list [2].

An API token can be used to manage allow lists 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 allow list. Multiple tokens can be used to create access for specific users and deleted at a later date.

How do I link an Edu App Center allow list to Canvas?

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

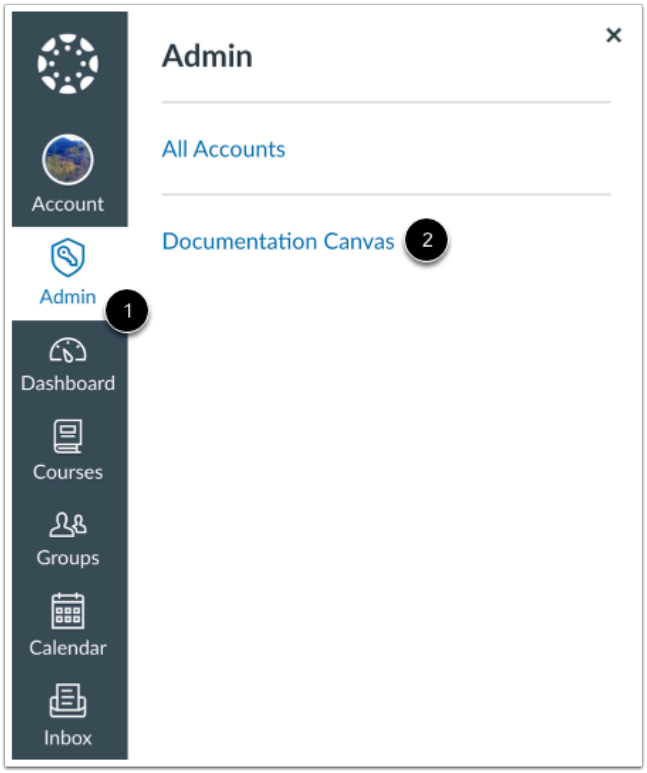
Admins can manage the app list at any time to remove or replace an access token. When an account or subaccount does not include an access token, the External Apps list displays the default app list provided by Canvas. The External Apps list can only be managed at the account and subaccount levels.

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 allows you to create multiple tokens for an organization, but each token directs to the same allow list. If you want to create separate allow lists that apply to individual subaccounts, create additional organizations in the Edu App Center and create API tokens for each allow list.

Notes:

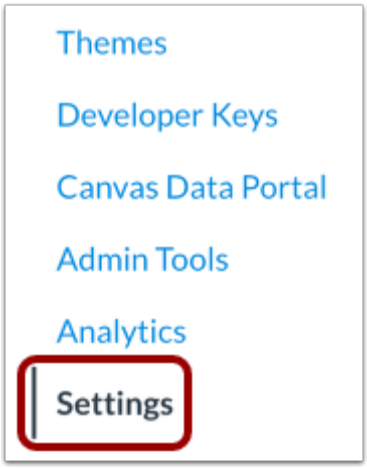
- Apps added to an Edu App Center allow list may take up to 24 hours to display in Canvas.
- To access the Manage App List button in the Apps tab in Account Settings, you must have the Manage LTI permission enabled.

Open Account



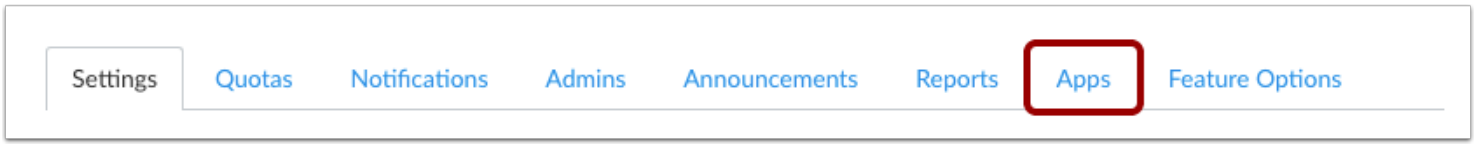
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



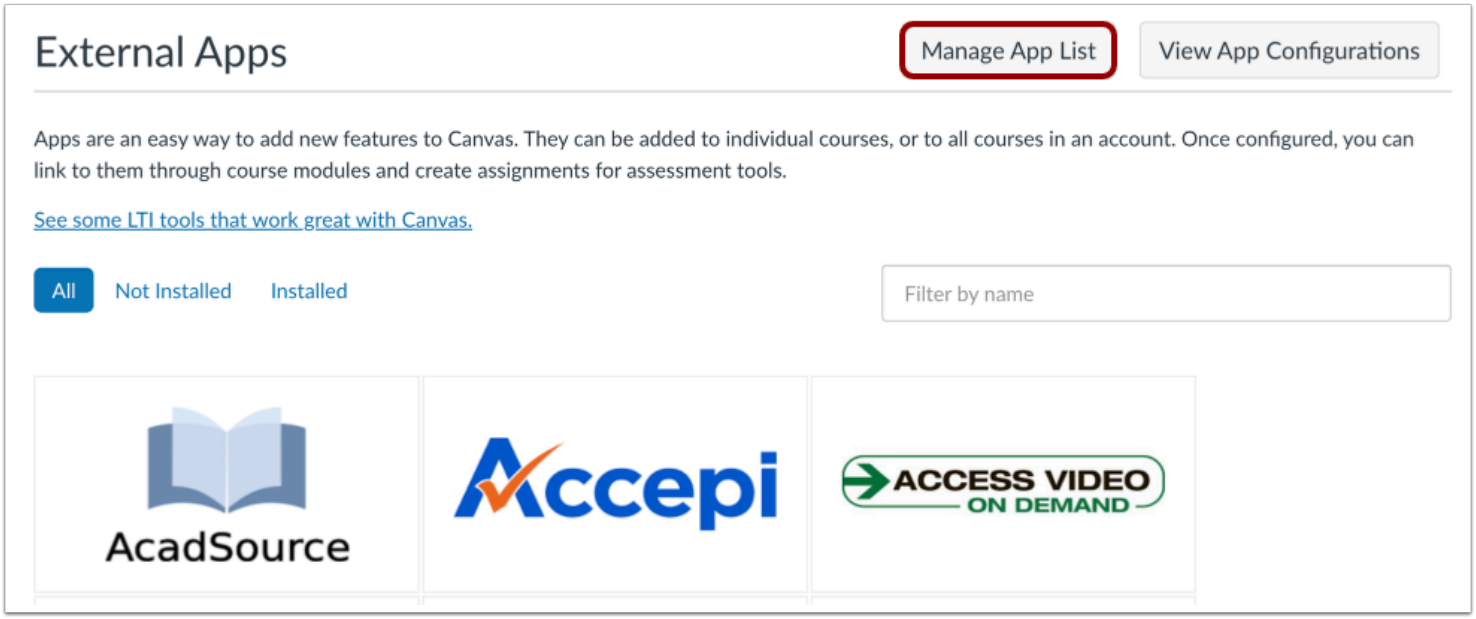
In Account Navigation, click the **Settings** link.

Open Apps



Click the **Apps** tab.

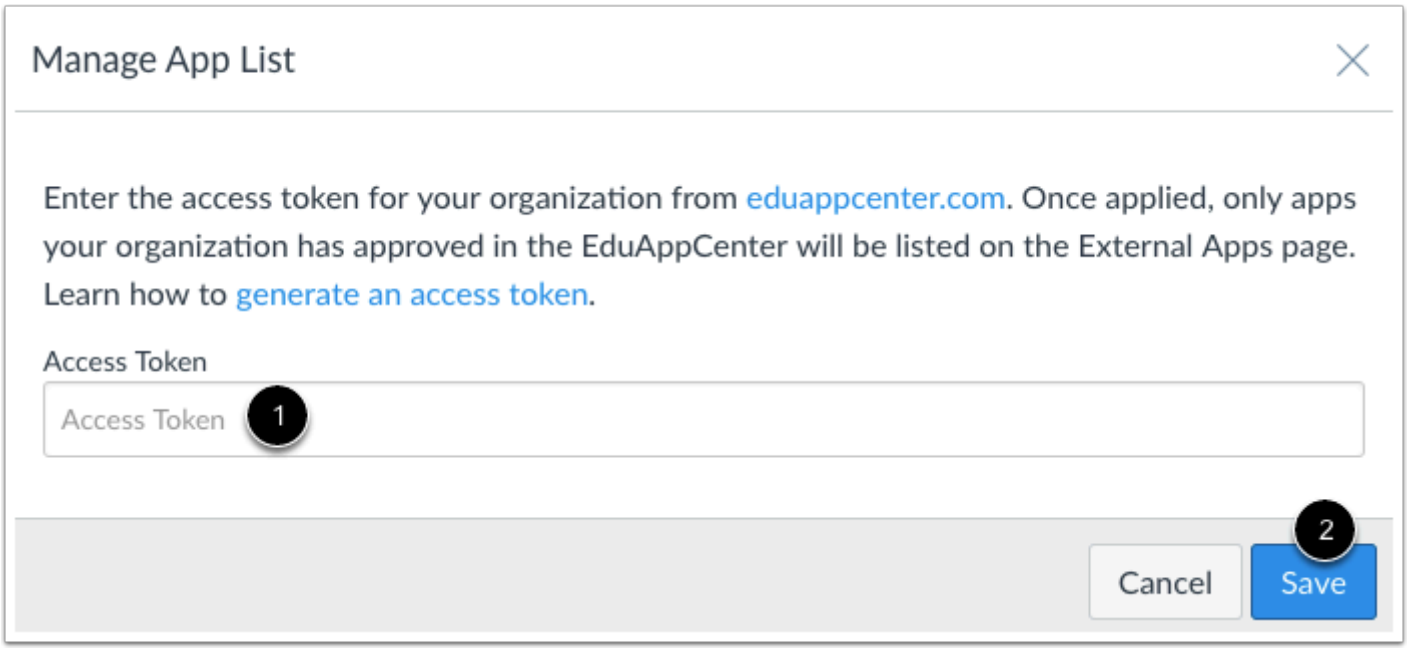
Manage App List



Click the **Manage App List** button.

Note: To access the Manage App List button in the Apps tab in Account Settings, you must have the Manage LTI permission enabled.

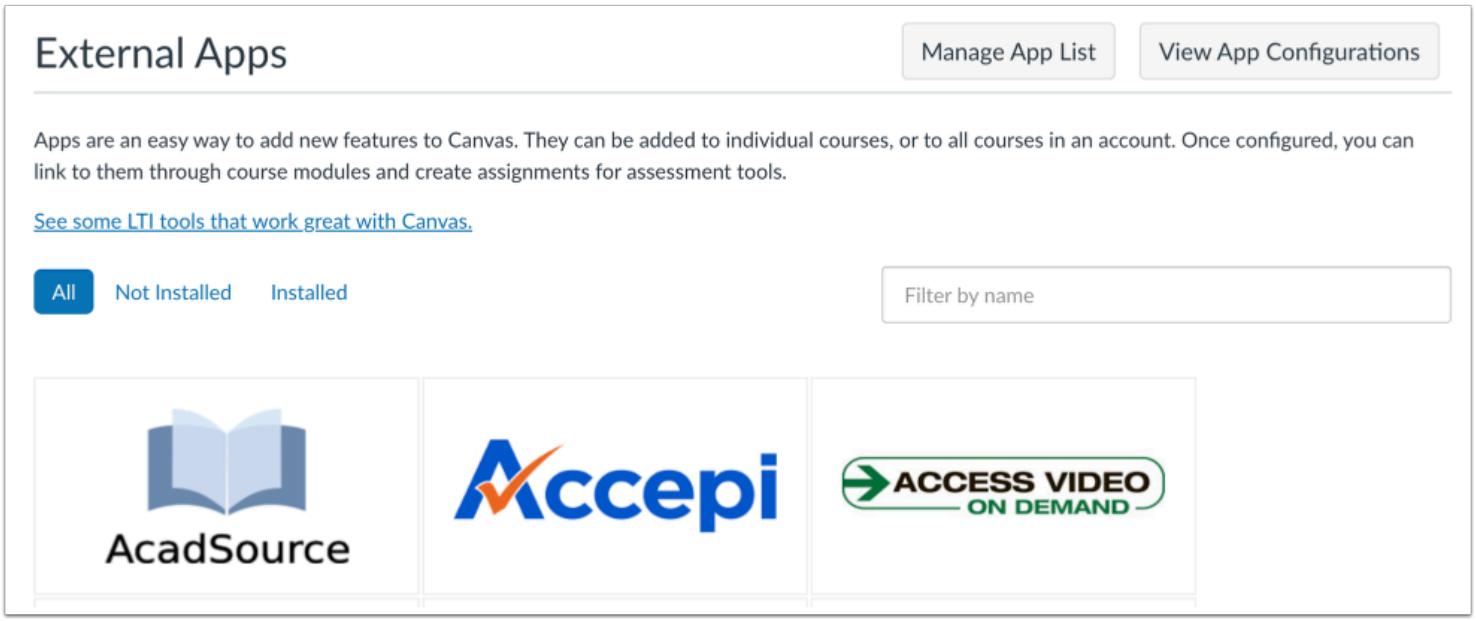
Enter API Token



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 allow list.

Note: If you enter an invalid access token, no apps display.

How do I configure an LTI key for an account?

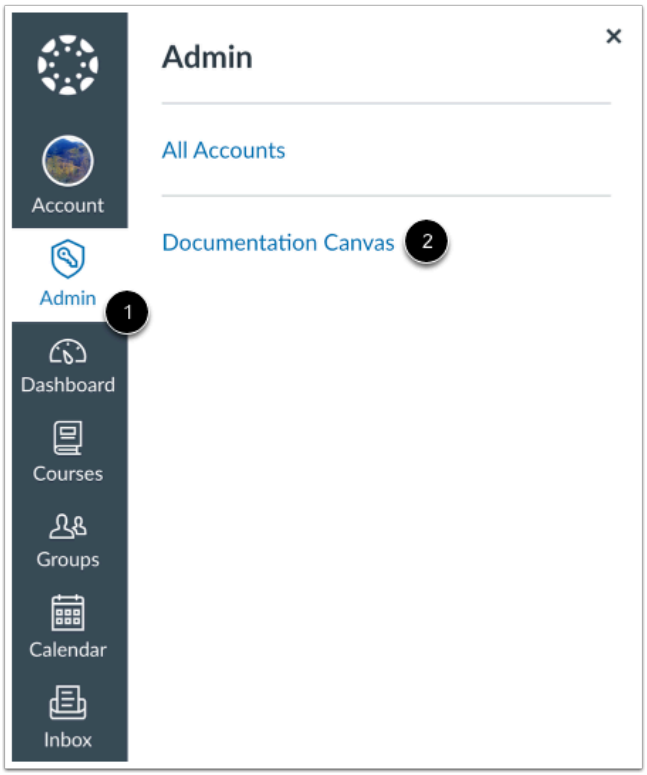
As an admin, you can configure an LTI key from the Developer Keys page. LTI keys can be used to enable an external app that supports IMS Global LTI 1.3 and LTI Advantage.

When supported by a tool provider, this framework allows admins to manage all LTI tool configuration data directly in the Developer Keys page. The LTI can then be added to an account or a course via an associated client ID. Specific questions about a provider's integration or potential integration with the LTI 1.3 and LTI Advantage framework should be sent directly to the tool provider.

Notes:

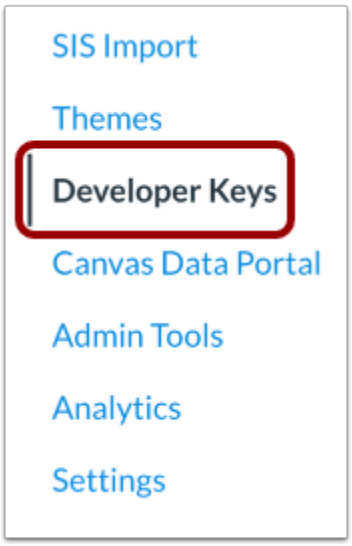
- Developer Keys is an account permission. If you cannot view the Developer Keys link in Account Navigation, this permission has not been enabled for your user account.
- Disabling or deleting the LTI key removes the application installs.
- For more information about LTI integrations, please visit the External Tools Introduction API page.

Open Account



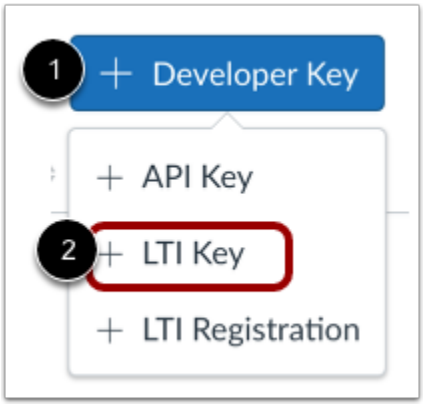
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Developer Keys



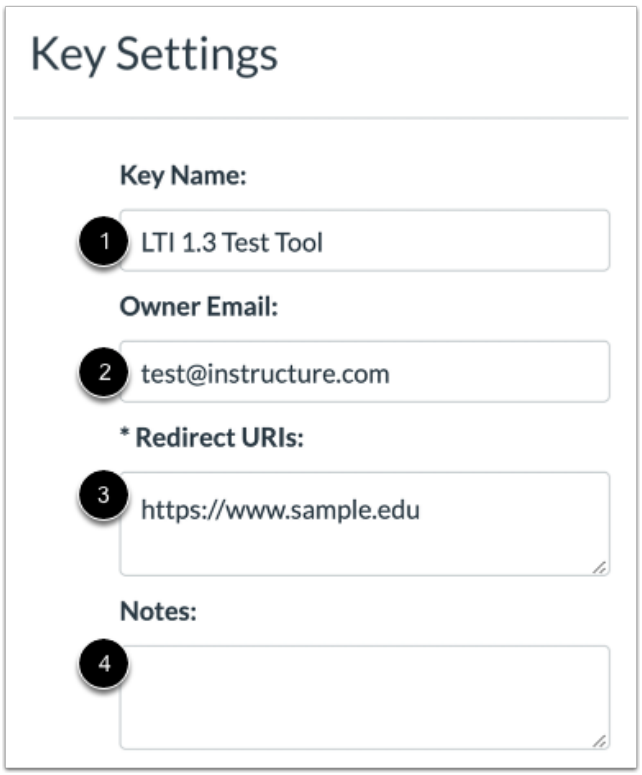
In Account Navigation, click the **Developer Keys** link.

Add LTI Key



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

Enter LTI Settings



Enter the settings for the LTI key:

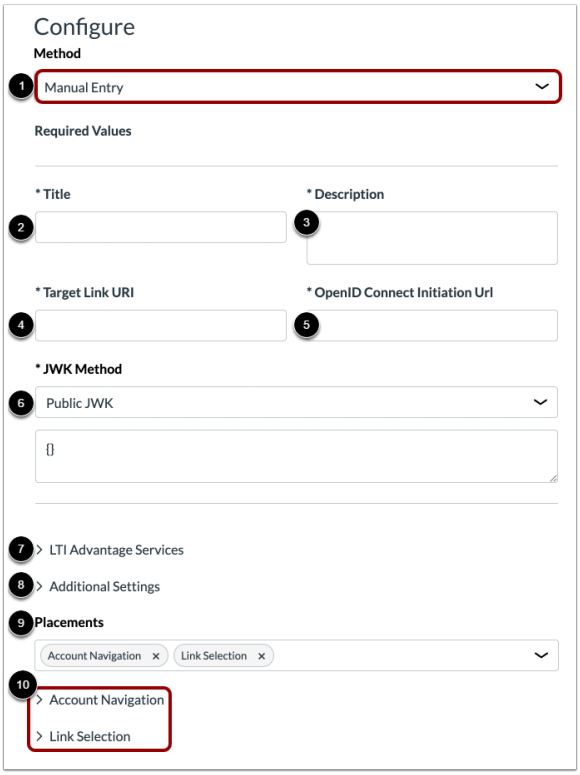
- **Key Name** [1]: The name of the company or external tool.
- **Owner Email** [2]: The email of the person who owns the external tool.
- **Redirect URIs** [3]: Redirect URI data should be provided by the tool provider. If you select the Paste JSON configuration method, the Redirect URI field will fill in automatically once you have entered the LTI 1.3 configuration.
- **Notes** [4]: Any notes about the LTI key, such as the reason it was created.

Select Configuration Method



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

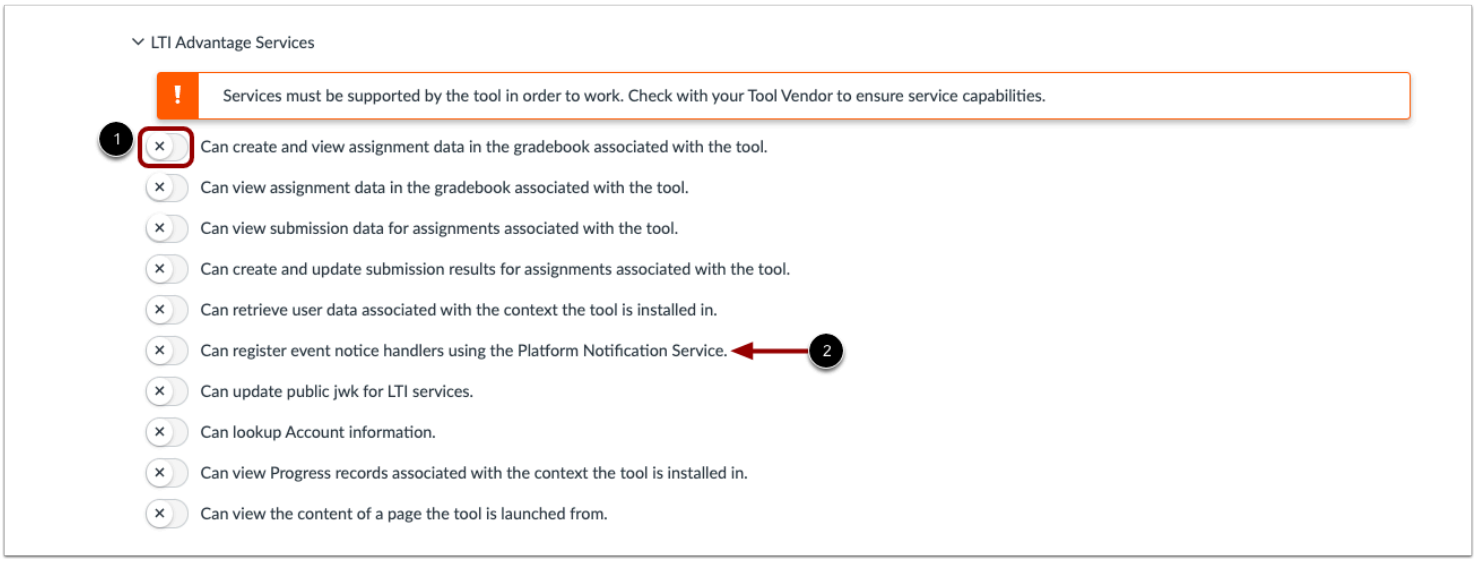
Enter Manual Entry Details



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

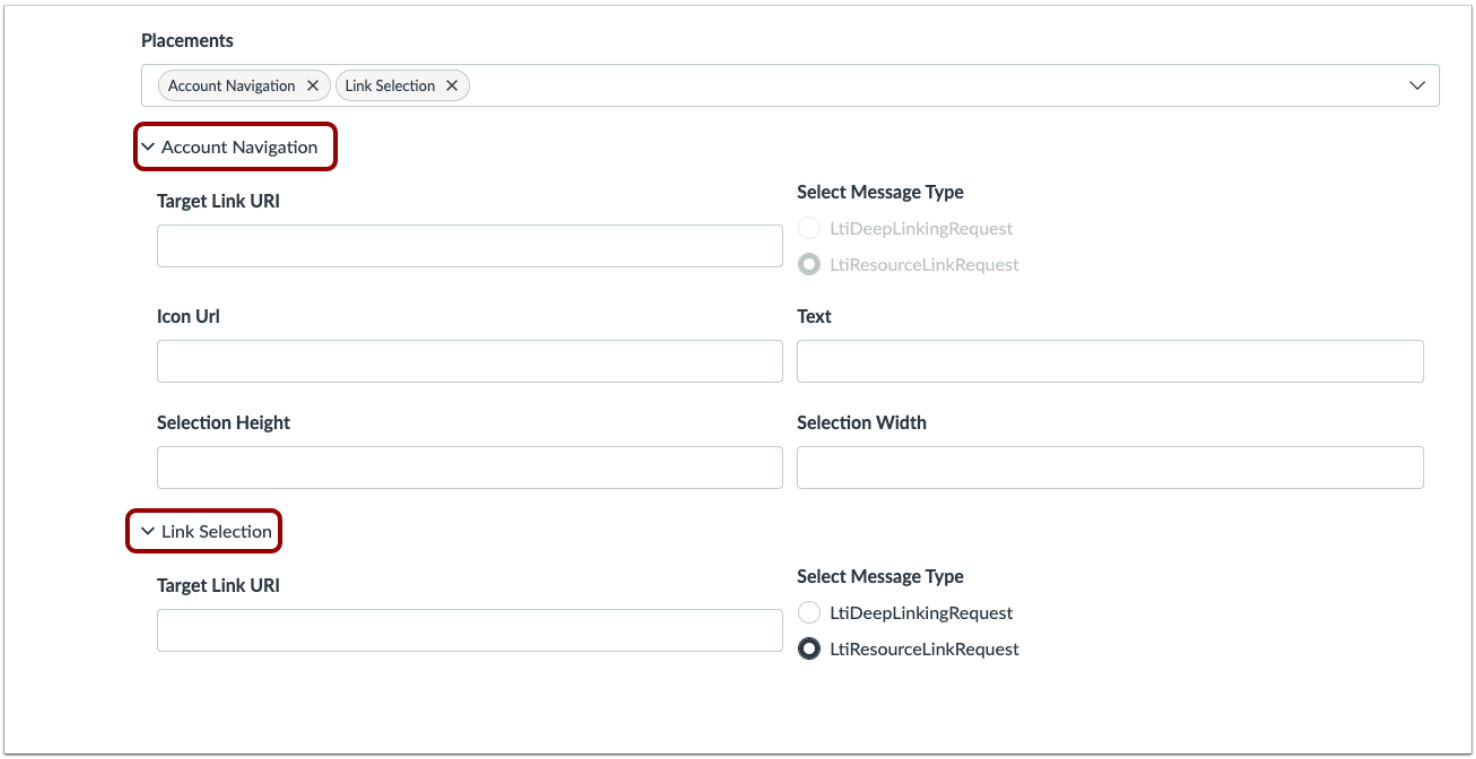
If the tool provider requests that their tool be set up via manual entry, they will need to provide the details to fill the required fields. Required fields are title [2], description [3], target link URL [4], OpenID connect initiation URL [5], and JWK method [6]. JWK method can be set to public JWK or public JWK URL.

You can also enter non-required details for LTI Advantage services [7], additional settings [8], and placements [9]. Any items selected in the Placements field will display as LTI setting items [10].



To enable or disable LTI Advantage services [1], click the toggle buttons on or off.

Note: When the **Can register event notice handlers using the Platform Notification Service** [2] option is enabled, the tool can register for notifications when a course is copied. This notification, defined by the LTI specification, is known as the LtiContextCopyNotice.



Notes:

- If the LTI vendor is unable to provide the information for the required fields, you may want to configure the tool via the Paste JSON or Enter URL option.
- LTI keys created without icons in the Editor Button placement automatically display a default icon with the first initial of the tool's name in the Rich Content Editor.
- To have the LTI as an assignment submission type, select the Submission Type Selection placement type. The Submission Type Selection placement is only available for Instructure approved LTI tools.

Enter JSON Details



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

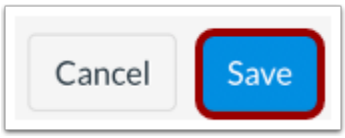
Then enter the JSON formatting in the **LTI 1.3 Configuration** field [2].

Enter JSON URL



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

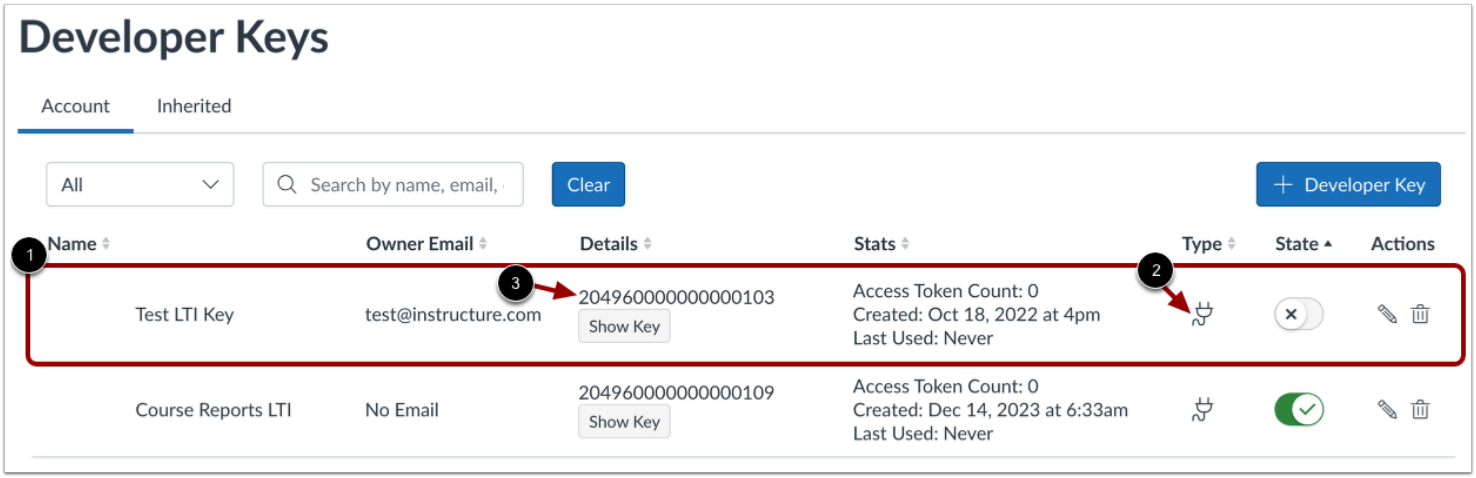
Save LTI Key



To save your LTI key, click the **Save** button.

Note: If you add a LTI tool and the LTI tool includes a Submission Type Selection placement that is not approved by Instructure for the particular LTI tool, a warning will display after saving the LTI Key.

View LTI Key



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

Each LTI key includes a client ID [3]. Copy or write down the client ID to enable the external tool from your Account Settings or to share it with users to enable the tool in a course.

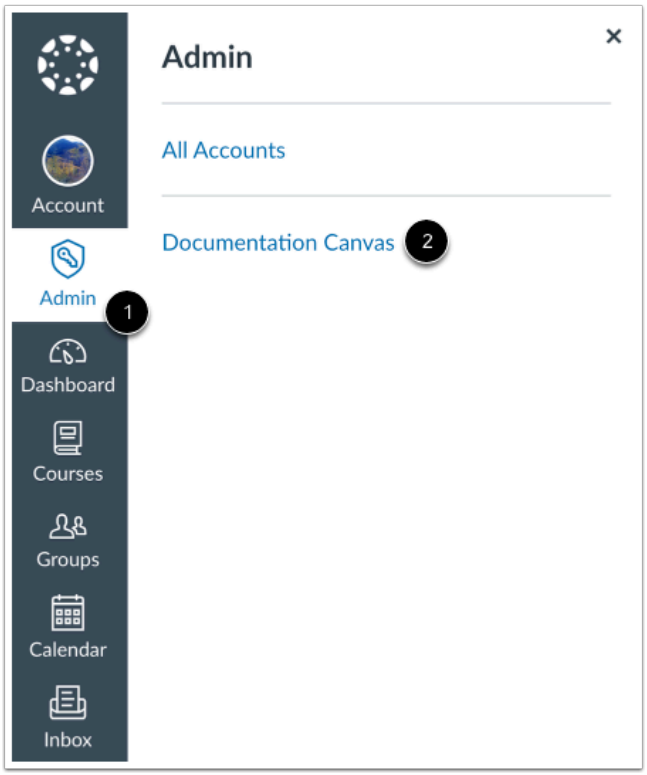
How do I configure an external app for an account using a URL?

Some external apps require a URL configuration. This lesson shows how to add an external tool using the URL provided by the external app provider. To learn more about configuring external apps, visit the Edu App Center.

Notes:

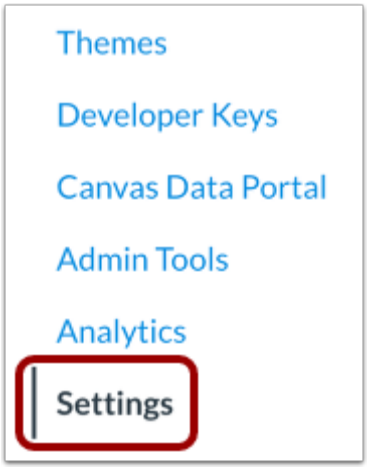
- External apps can also be configured using a URL in sub-accounts.
- Manually configuring an external app is an account permission. If you cannot configure an external app, this permission has not been enabled for your user role.

Open Account



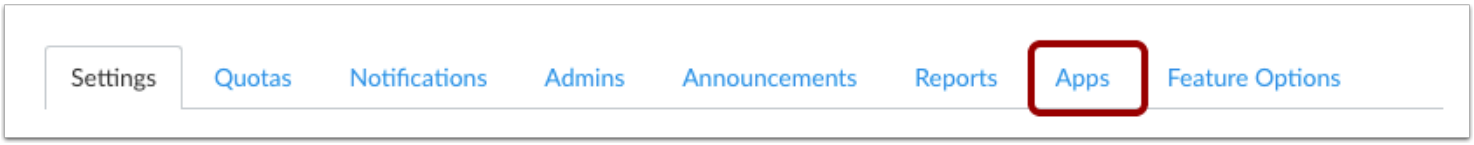
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



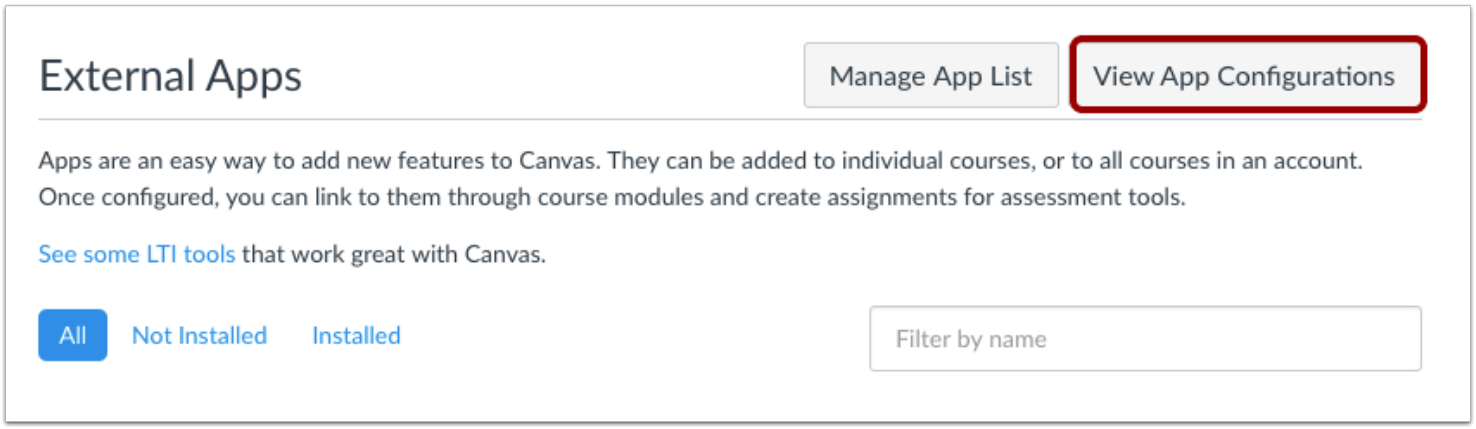
In Account Navigation, click the **Settings** link.

Open Apps



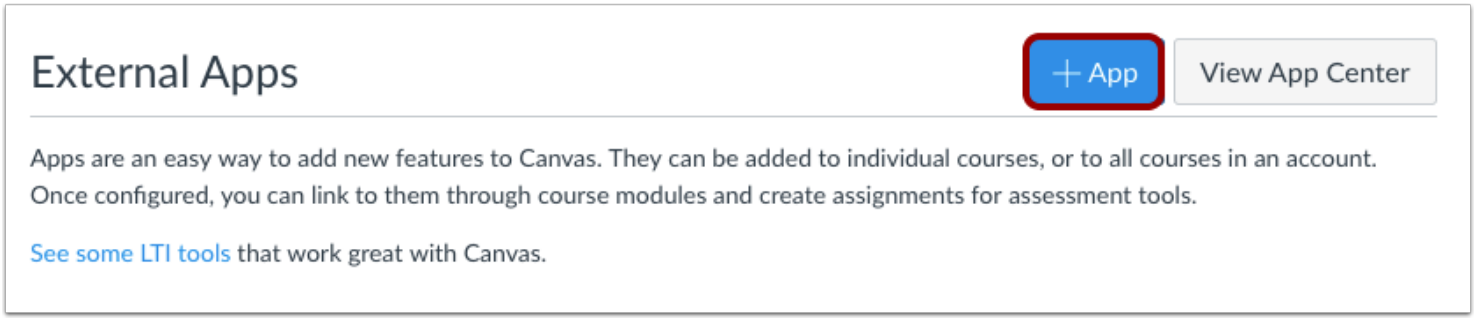
Click the **Apps** tab.

View App Configurations



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

Add New App



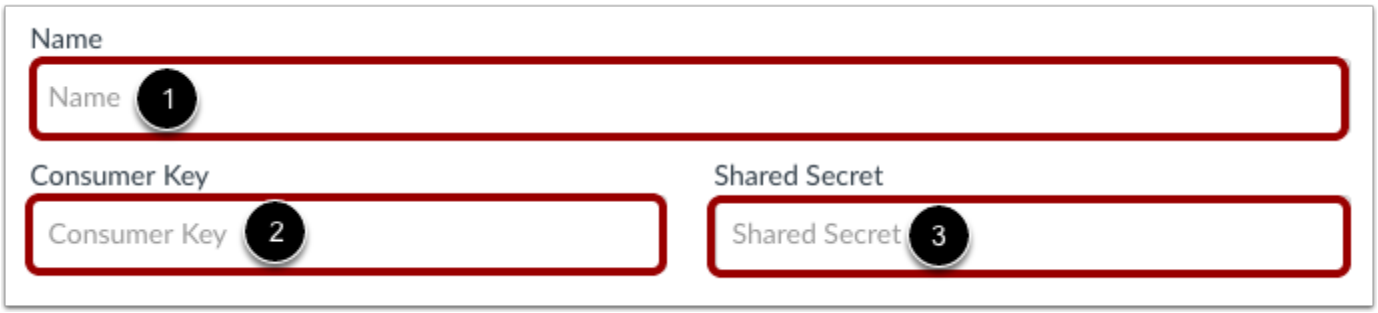
Click the **Add App** button.

Set Configuration Type



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

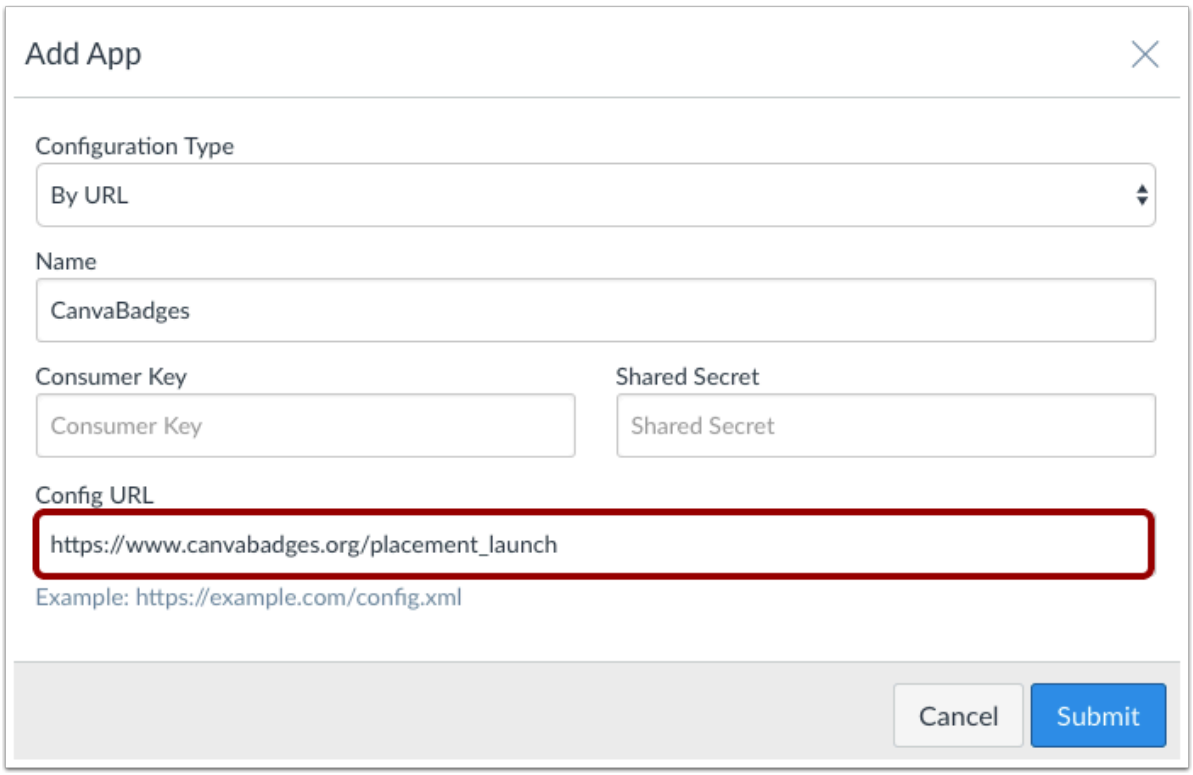
Add App Details



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.

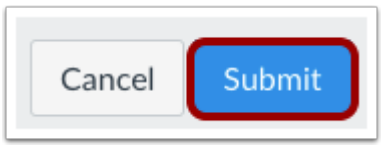
Note: There are some apps that do not require a consumer key or shared secret, so pay attention to the configuration directions.

Add Configuration URL



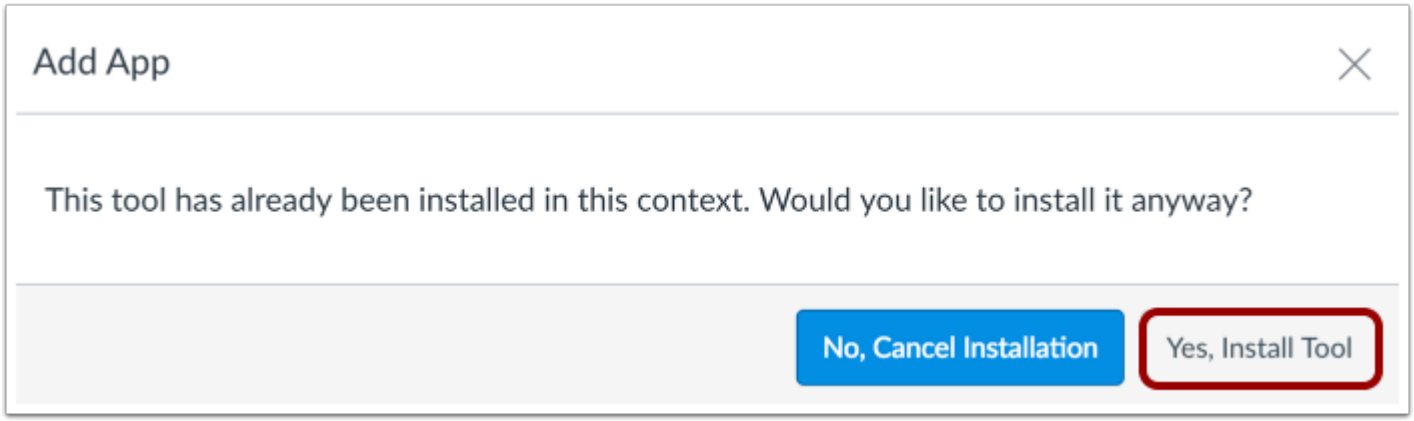
In the **Configuration URL** field, enter the URL for the app. Apps are configured and recommended to be entered as secure links (HTTPS).

Submit App



Click the **Submit** button.

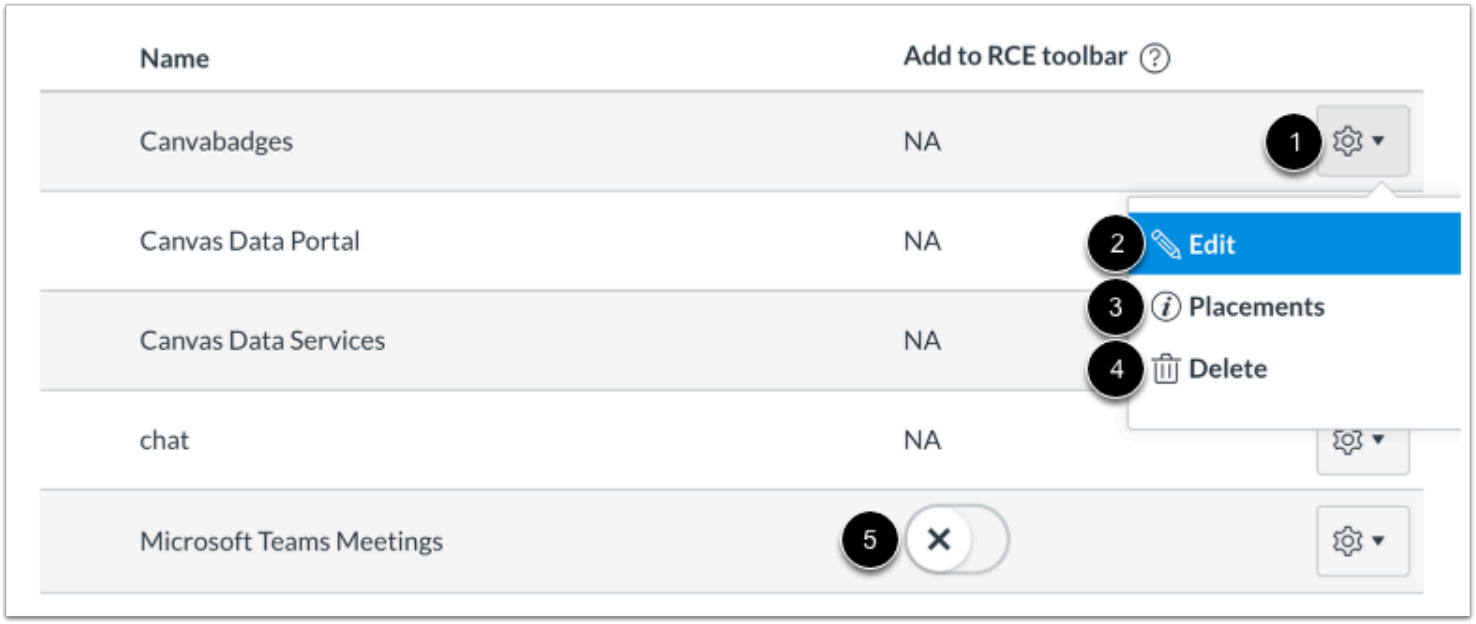
Verify App



If the app has already been added in the account, Canvas verifies that you still want to install the app. To continue, click the **Yes, Install Tool** button.

Note: Verifications only take place in the same context for an existing external app (such as installing the same app multiple times in the root account).

View App



View the external app.

To manage the app, click the **Settings** icon [1]. To edit the app, click the **Edit** link [2]. To manage app placements, click the **Placements** link [3]. To delete the app, click the **Delete** link [4].

To add an external app to the Rich Content Editor toolbar, click the **Add to RCE toolbar** toggle [5]. This option is only available for external tools that support placement in the Rich Content Editor.

Note: When you click the Placements link, you may see a No Placements Enabled message. This message indicates that the app does not have any specified placements within Canvas. However, the app will still work as intended.

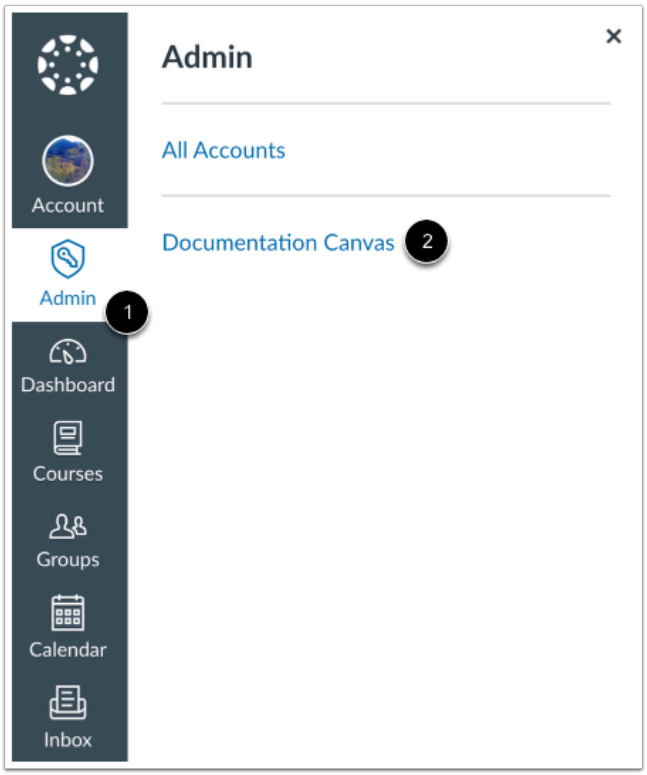
How do I configure an external app for an account using XML?

Some external apps require an XML configuration. This lesson shows how to add an external tool using the XML provided by the external app provider. To learn more about configuring external apps, visit the Edu App Center.

Notes:

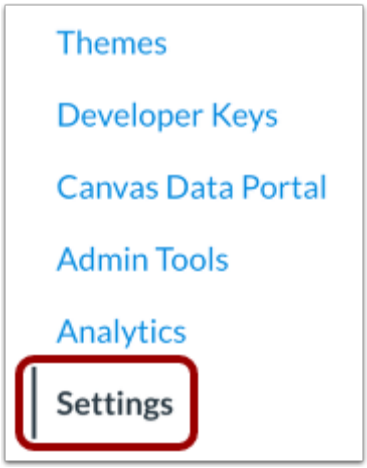
- External apps can also be configured using XML in sub-accounts.
- Manually configuring an external app is an account permission. If you cannot configure an external app, this permission has not been enabled for your user role.

Open Account



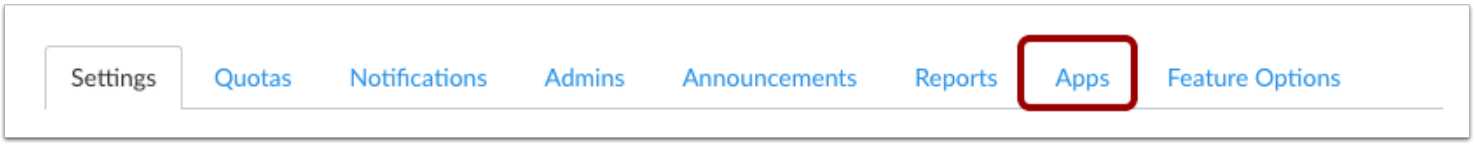
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



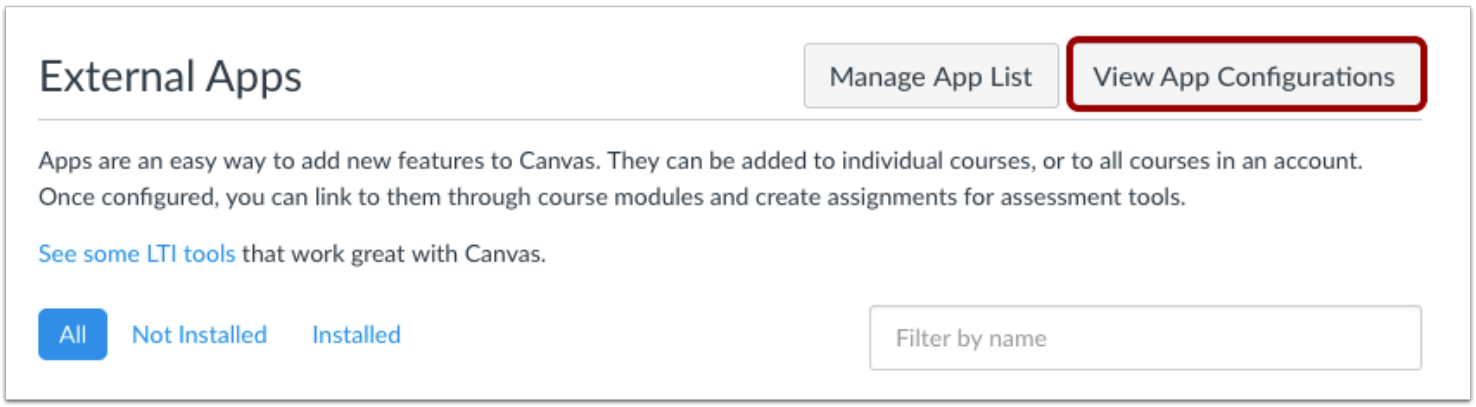
In Account Navigation, click the **Settings** link.

Open Apps



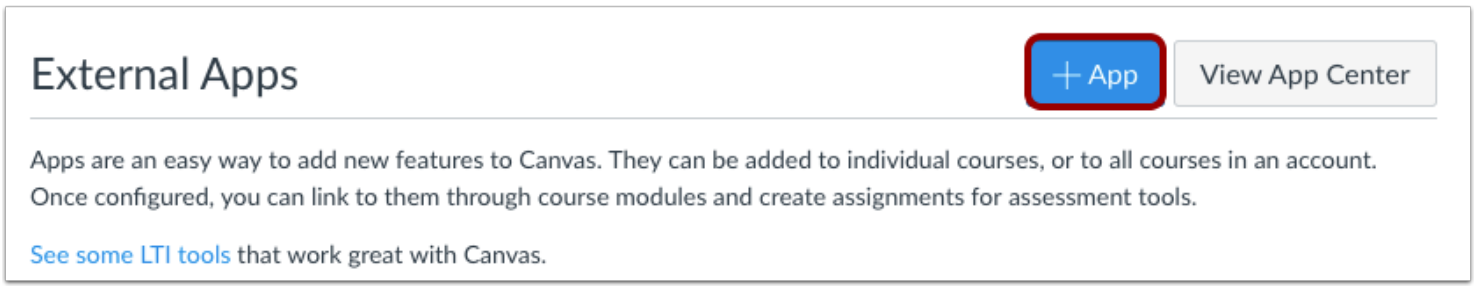
Click the **Apps** tab.

View App Configurations



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

Add New App



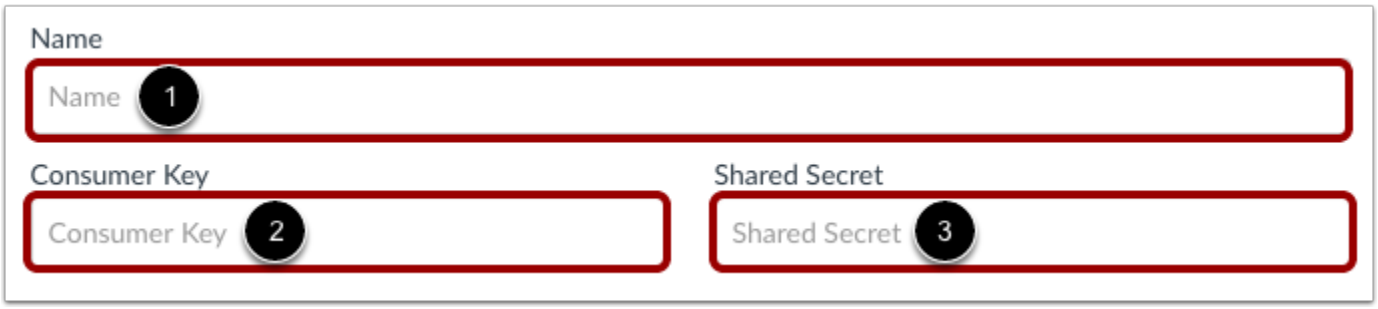
Click the **Add App** button.

Set Configuration Type



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

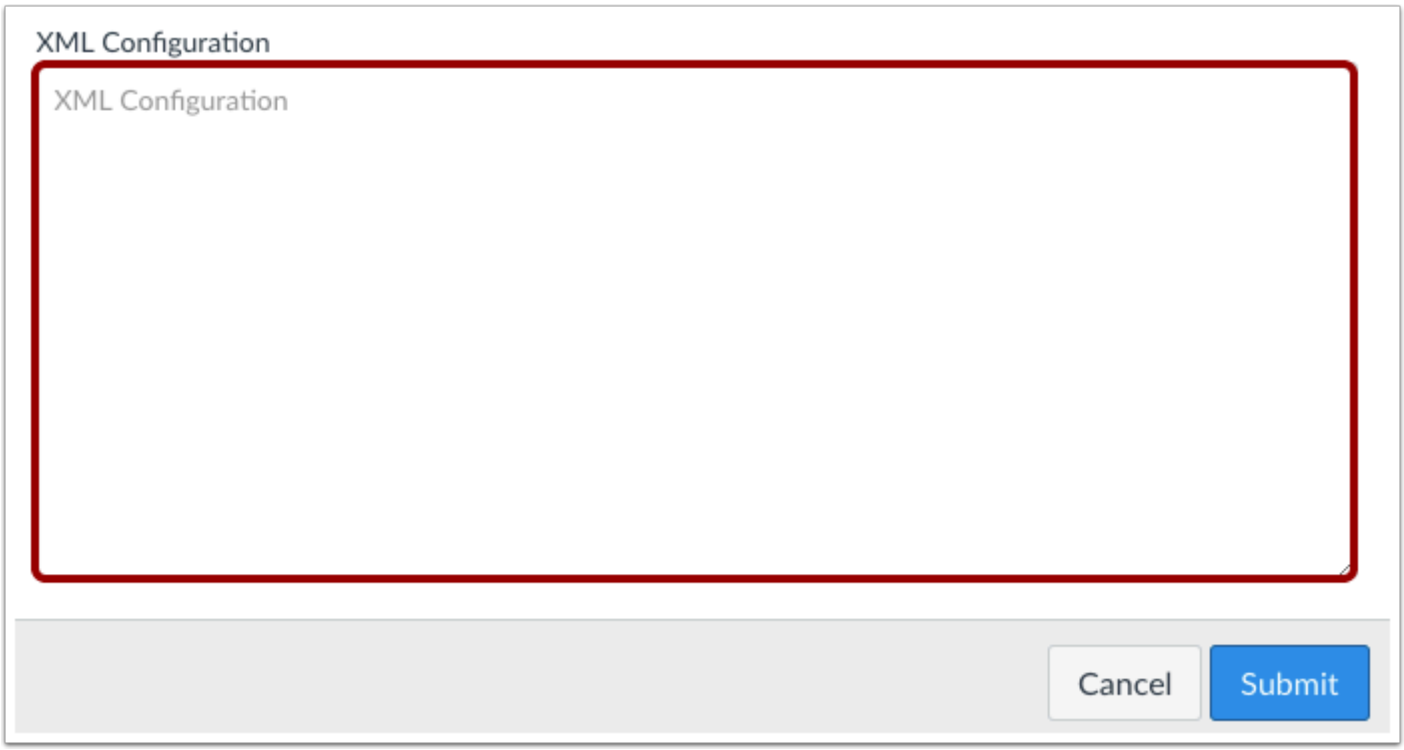
Add App Details



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.

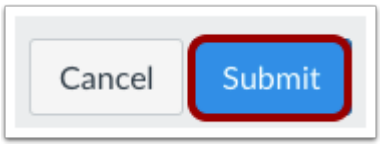
Note: There are some apps that do not require a consumer key or shared secret, so pay attention to the configuration directions.

Enter Configuration XML



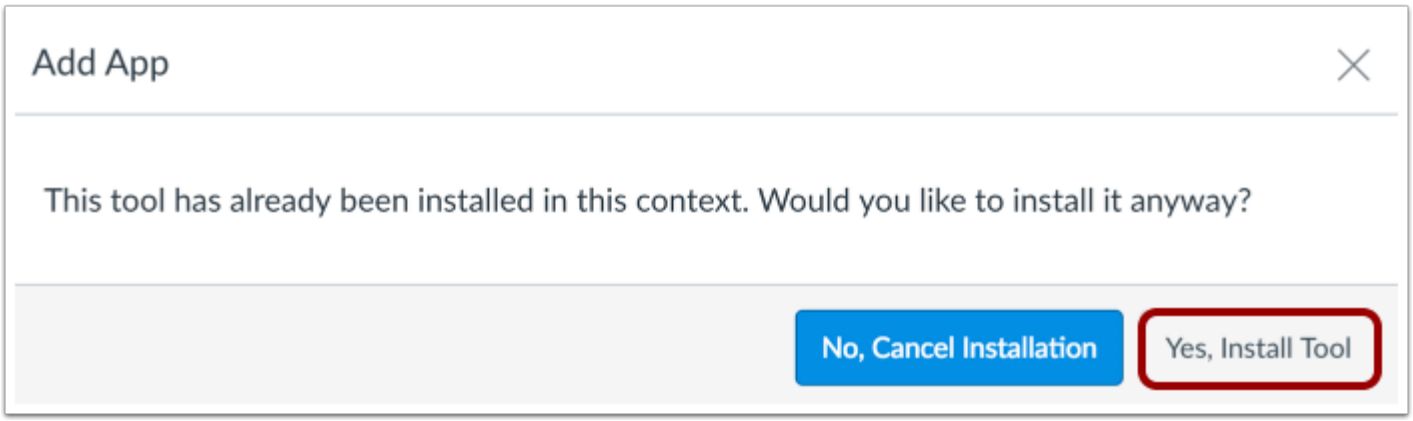
In the **XML Configuration** field, paste the XML code.

Submit App



Click the **Submit** button.

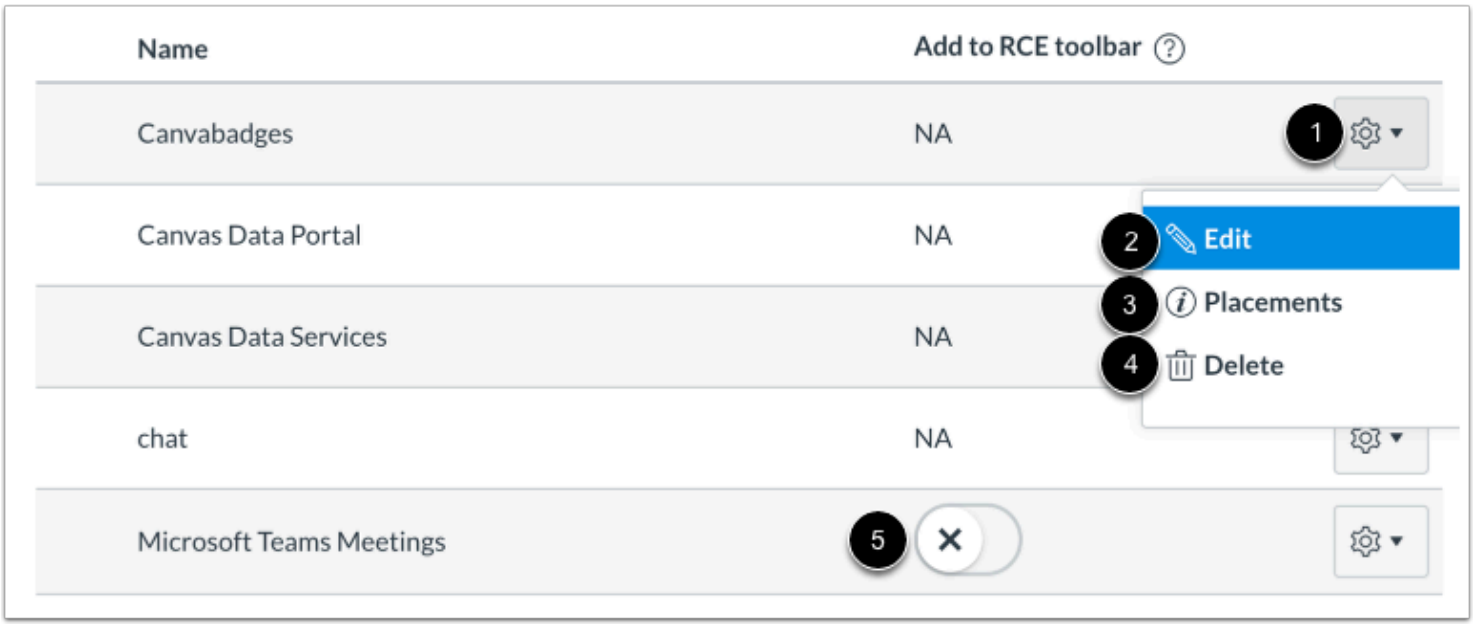
Verify App



If the app has already been added in the account, Canvas verifies that you still want to install the app. To continue, click the **Yes, Install Tool** button.

Note: Verifications only take place in the same context for an existing external app (such as installing the same app multiple times in the root account).

View App



View the external app.

To manage the app, click the **Settings** icon [1]. To edit the app, click the **Edit** link [2]. To manage app placements, click the **Placements** link [3]. To delete the app, click the **Delete** link [4].

To add an external app to the Rich Content Editor toolbar, click the **Add to RCE toolbar** toggle [5]. This option is only available for external tools that support placement in the Rich Content Editor.

Note: When you click the Placements link, you may see a No Placements Enabled message. This message indicates that the app does not have any specified placements within Canvas. However, the app will still work as intended.

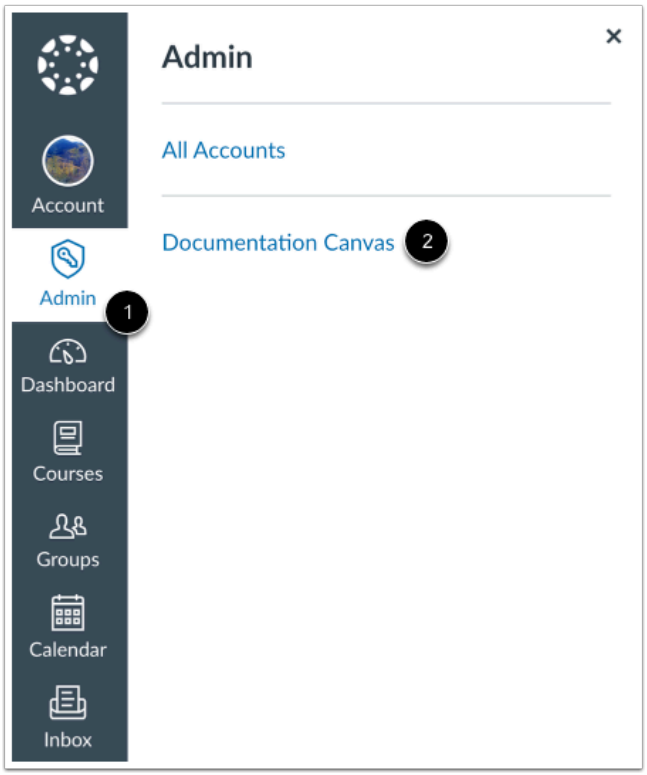
How do I configure an external app for an account using a client ID?

External apps that support LTI 1.3 and LTI Advantage require configuration using a client ID. The client ID can be found by configuring an LTI key from the Developer Keys page.

Notes:

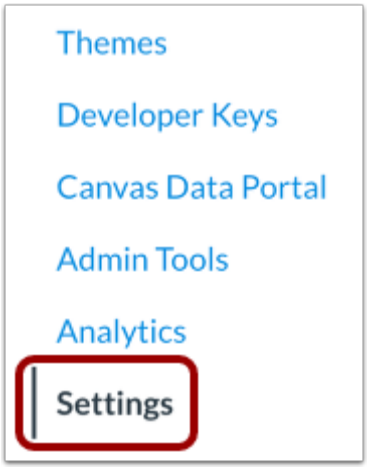
- Manually configuring an external app is an account permission. If you cannot configure an external app, this permission has not been enabled for your user role.
- Disabling or deleting the LTI key removes the application installs.

Open Account



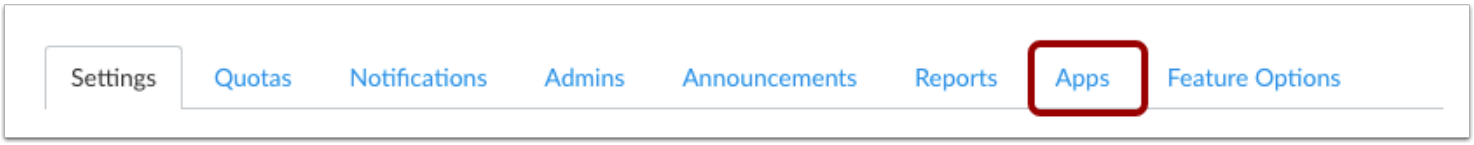
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



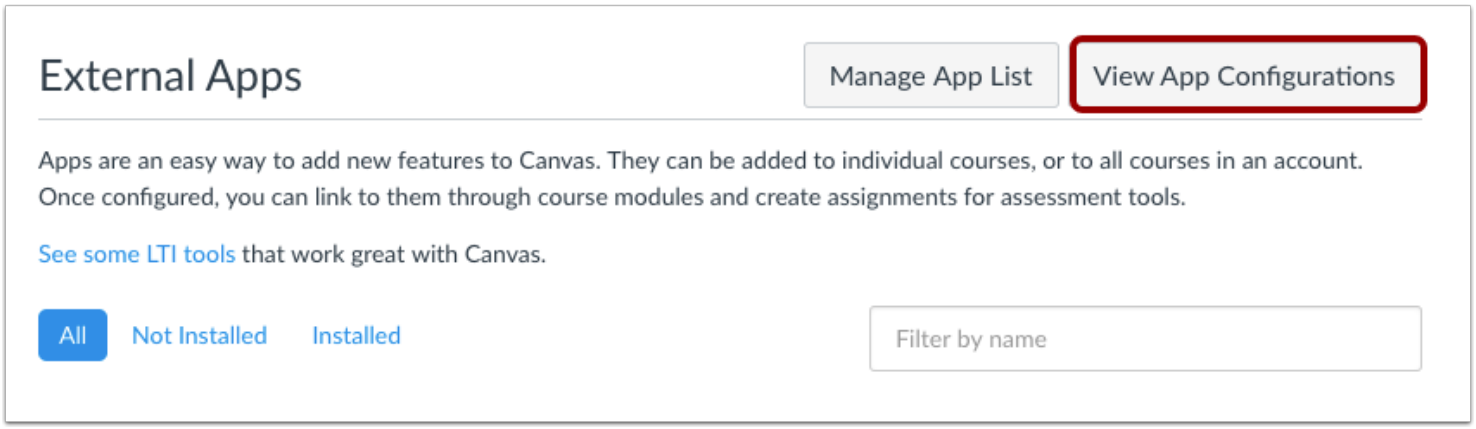
In Account Navigation, click the **Settings** link.

Open Apps



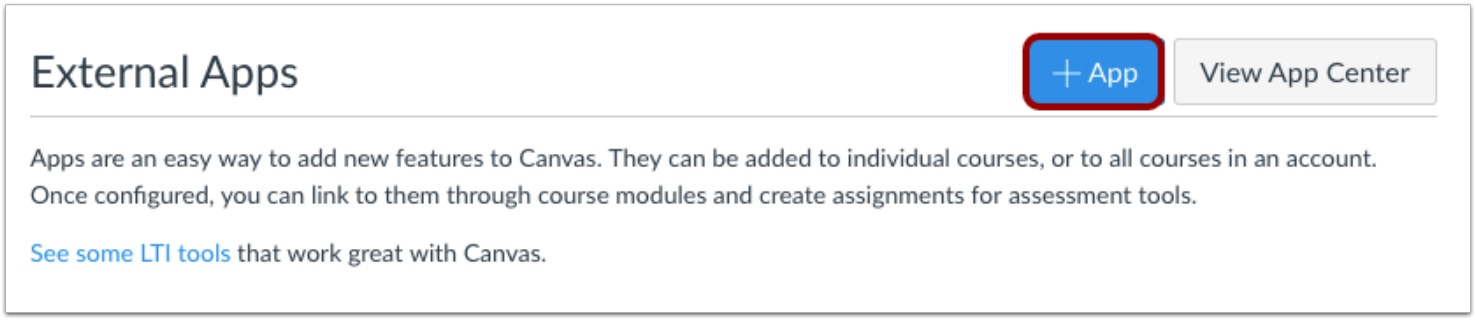
Click the **Apps** tab.

View App Configurations



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 Client ID**.

Enter Client ID



Enter the client ID in the **Client ID** field [1].

Then click the **Submit** button [2].

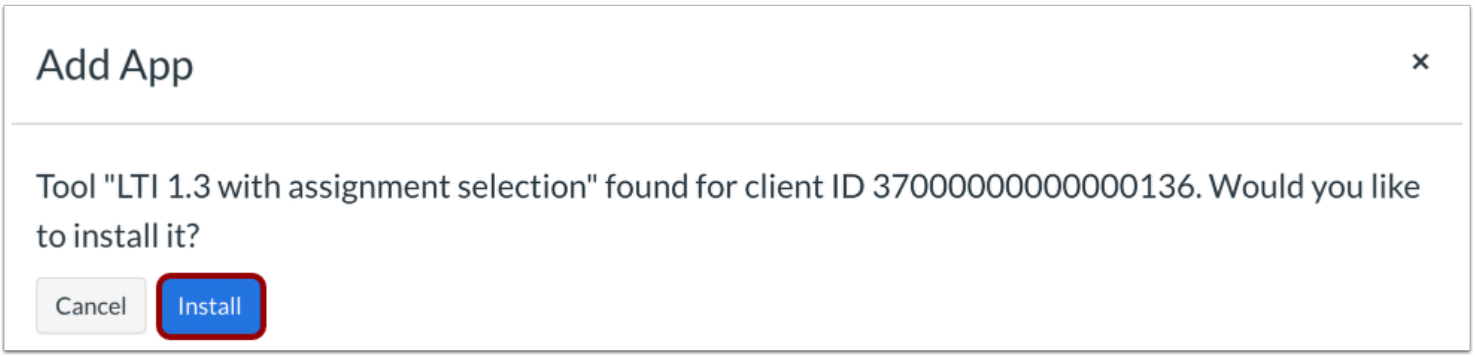
Note: If you do not have a client ID, you must first configure an LTI key.

View Error Message



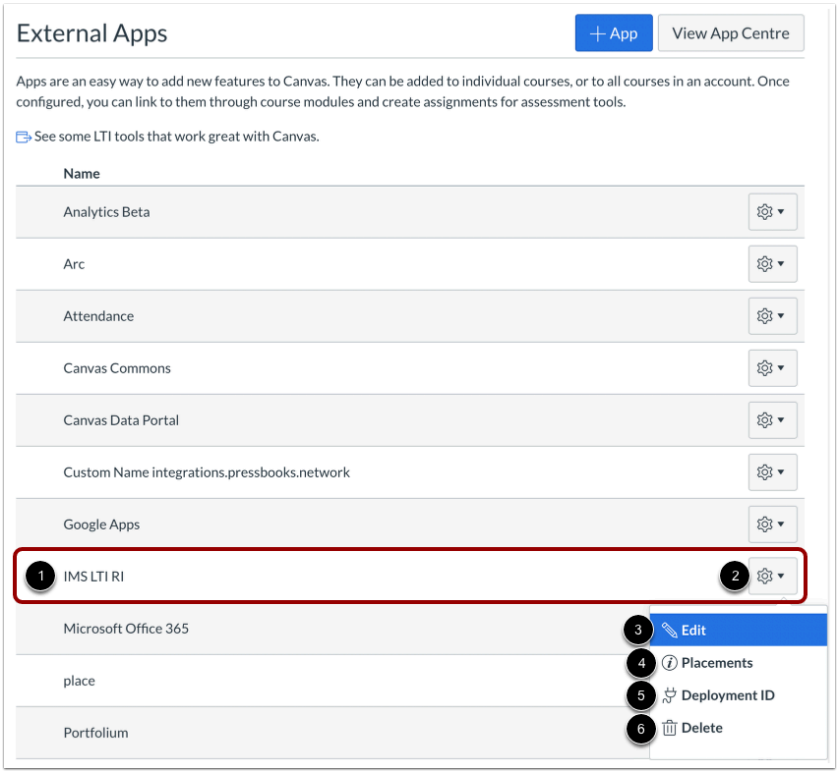
If the submitted client ID is not found in your account's developer keys, Canvas will display an error message.

Install App



To install the app, click the **Install** button.

View App



View your app on the External Apps page [1].

To manage your app, click the **Settings** icon [2].

To edit the app, click the **Edit** link [3]. To manage app placements, click the **Placements** link [4].

If the app supports LTI Advantage, the Settings menu may also display a Deployment ID link.

To view the Deployment ID for the app, click the **Deployment ID** link [5]. App providers who utilize LTI Advantage may require this Deployment ID for app functionality.

To delete the app, click the **Delete** link [6].

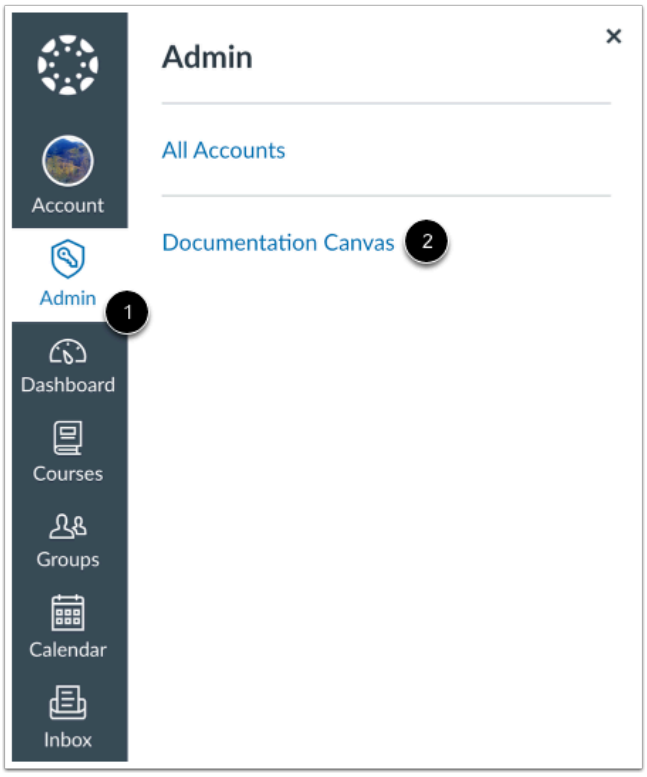
How do I configure an external app for an account using an LTI 2 Registration URL?

Some similarity detection external apps can be configured using an LTI 2 registration URL. This lesson shows how to add an external tool using a URL provided by the external app provider. To learn more about configuring external apps, visit the Edu App Center.

Notes:

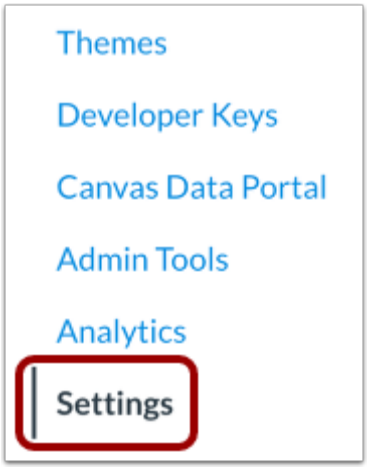
- External apps can also be configured using an LTI 2 registration URL in sub-accounts.
- Configuring an external app is an account permission. If you cannot configure an external app, this permission has not been enabled for your user role.

Open Account



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

Open Settings



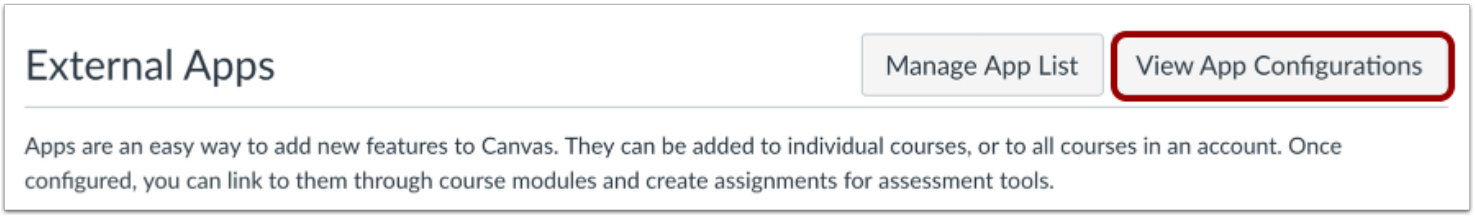
In Account Navigation, click the **Settings** link.

Open Apps



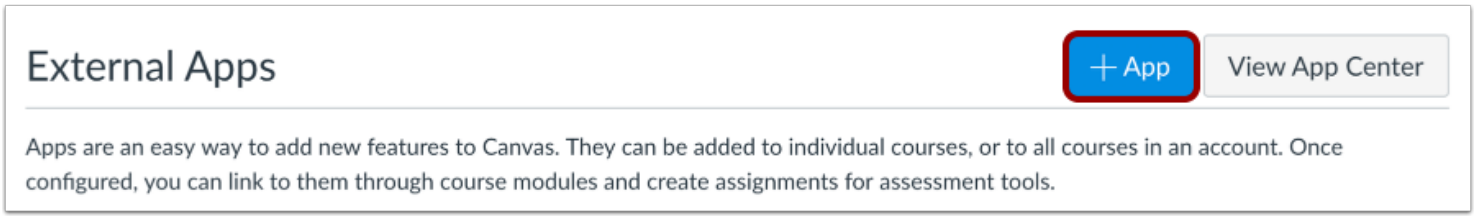
Click the **Apps** tab.

View App Configurations



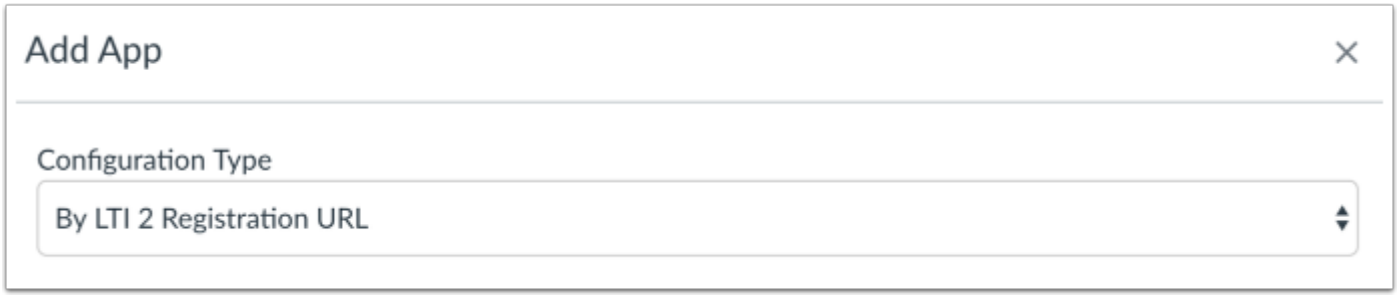
To configure an app, click the **View App Configurations** button.

Add New App



Click the **Add App** button.

Select Configuration Type



Click the **Configuration Type** drop-down menu and select **By LTI 2 Registration URL**.

Add Registration URL



In the **Registration URL** field, enter the URL for the app.

Apps are configured and recommended to be entered as secure links (HTTPS).

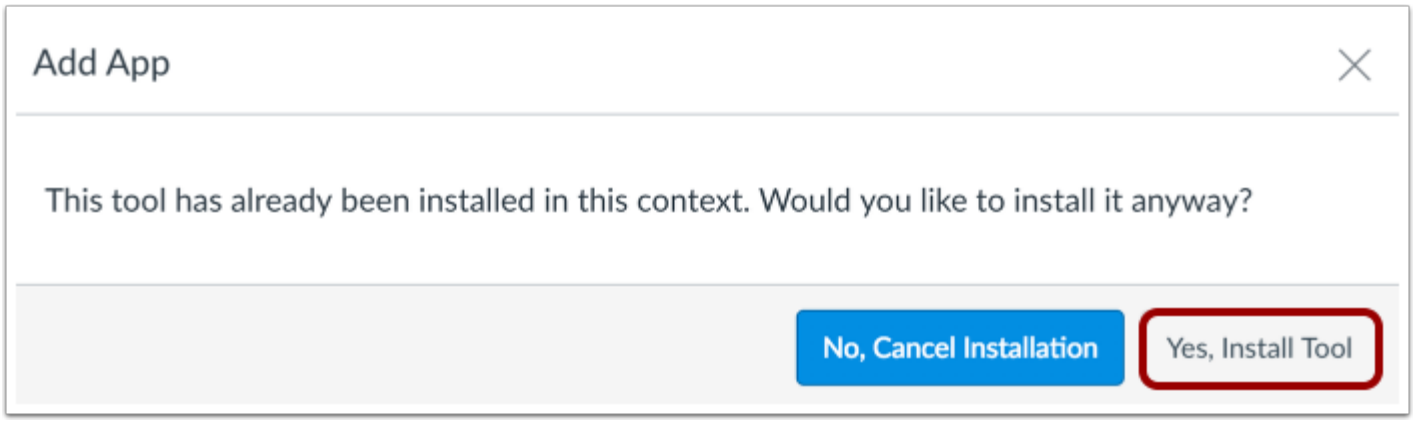
Launch Registration Tool



Click the **Launch Registration Tool** button.

Note: You may have to confirm settings or provide additional information in the Registration Tool.

Verify App



If the app has already been added in the account, Canvas verifies that you still want to install the app.

To continue, click the **Yes, Install Tool** button.

View App



View the external app.

To manage the app, click the **Settings** icon [1]. To edit the app, click the **Edit** link [2]. To manage app placements, click the **Placements** link [3]. To delete the app, click the **Delete** link [4].

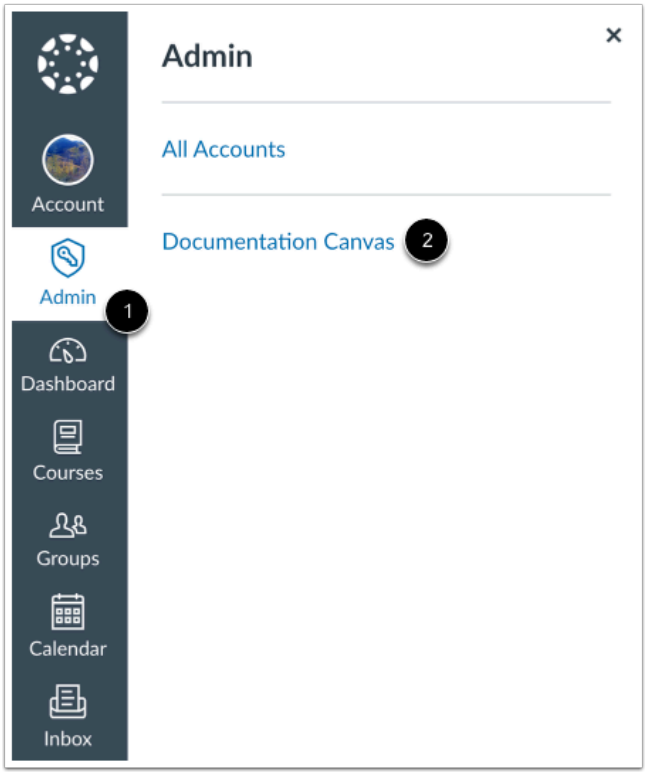
How do I configure a manual entry external app for an account?

You can manually configure an external app in your account settings in Canvas. However, configuring an external app by URL is more common.

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

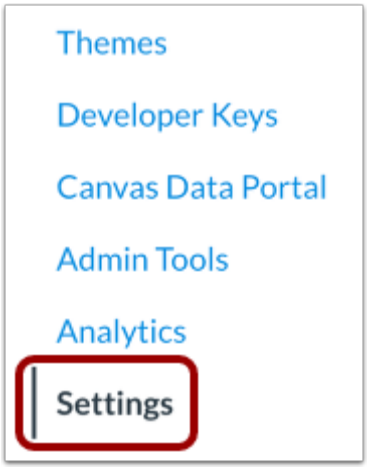
Note: Manually configuring an external app is an account permission. If you cannot configure an external app, this permission has not been enabled for your user role.

Open Account



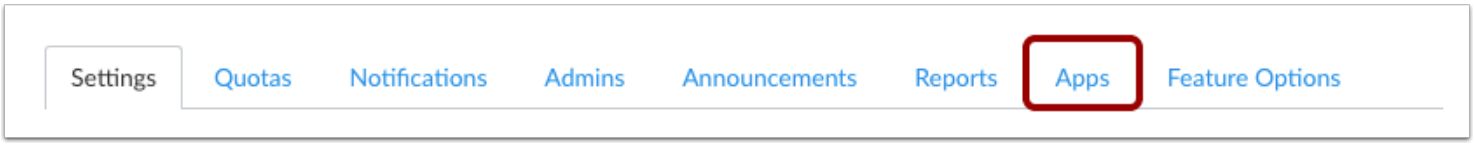
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



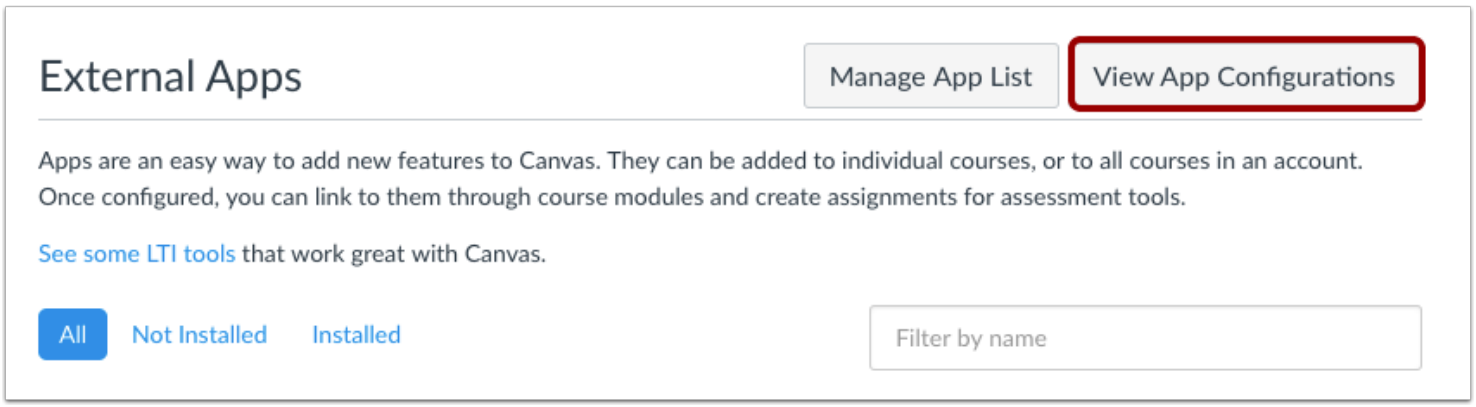
In Account Navigation, click the **Settings** link.

Open Apps



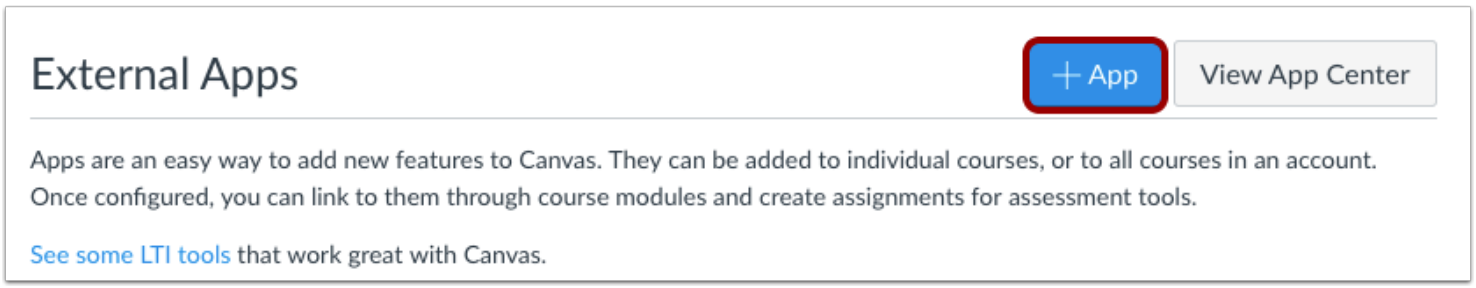
Click the **Apps** tab.

View App Configurations



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

Add App



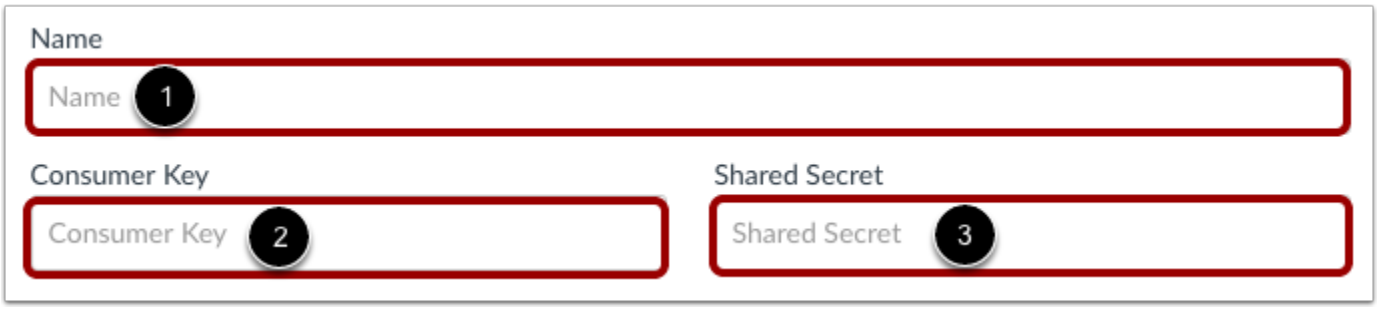
Click the **Add App** button.

Set Configuration Type



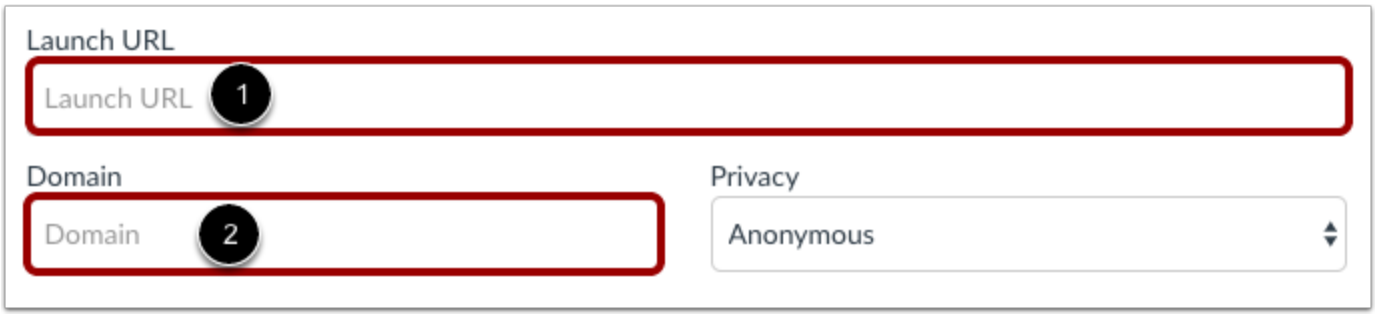
Select the Configuration Type drop-down menu and set the configuration type to **Manual Entry**.

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

Set Privacy



Select the Privacy drop down menu to set the privacy settings:

1. **Anonymous:** No identifying information about the user will be sent to the vendor
2. **Email Only:** The user's email is the only identifying information sent to the vendor.
3. **Name Only:** The user's name is the only identifying information sent to the vendor.
4. **Public**: Various identifying information (name, email, Canvas ID, SIS ID of the course, SIS ID of user, etc.) is sent to the vendor.

Add Custom Fields and Descriptions



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

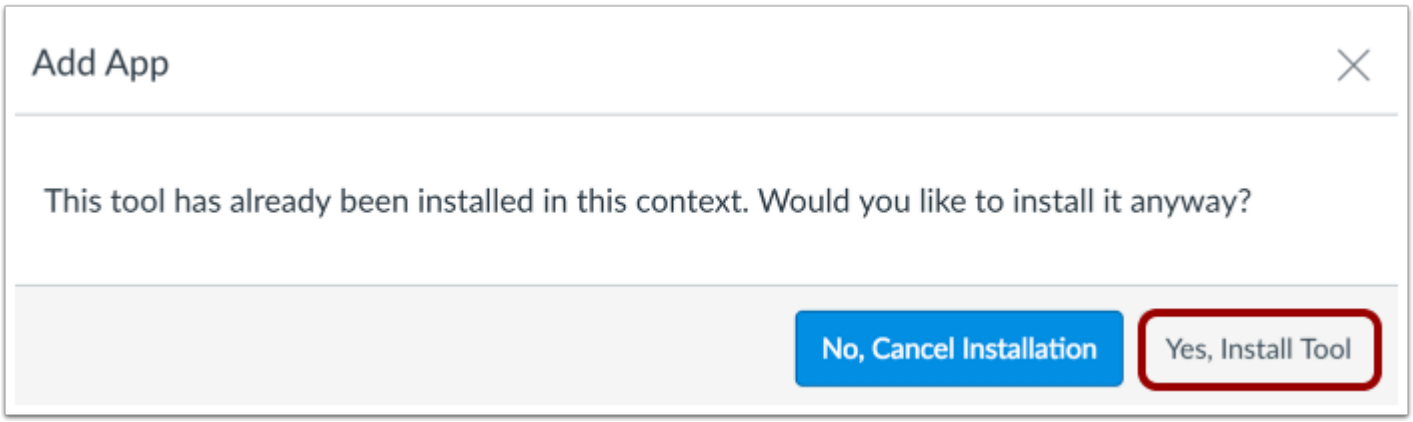
Type a description of the app in the **Description** field [2].

Submit App



Click the **Submit** button.

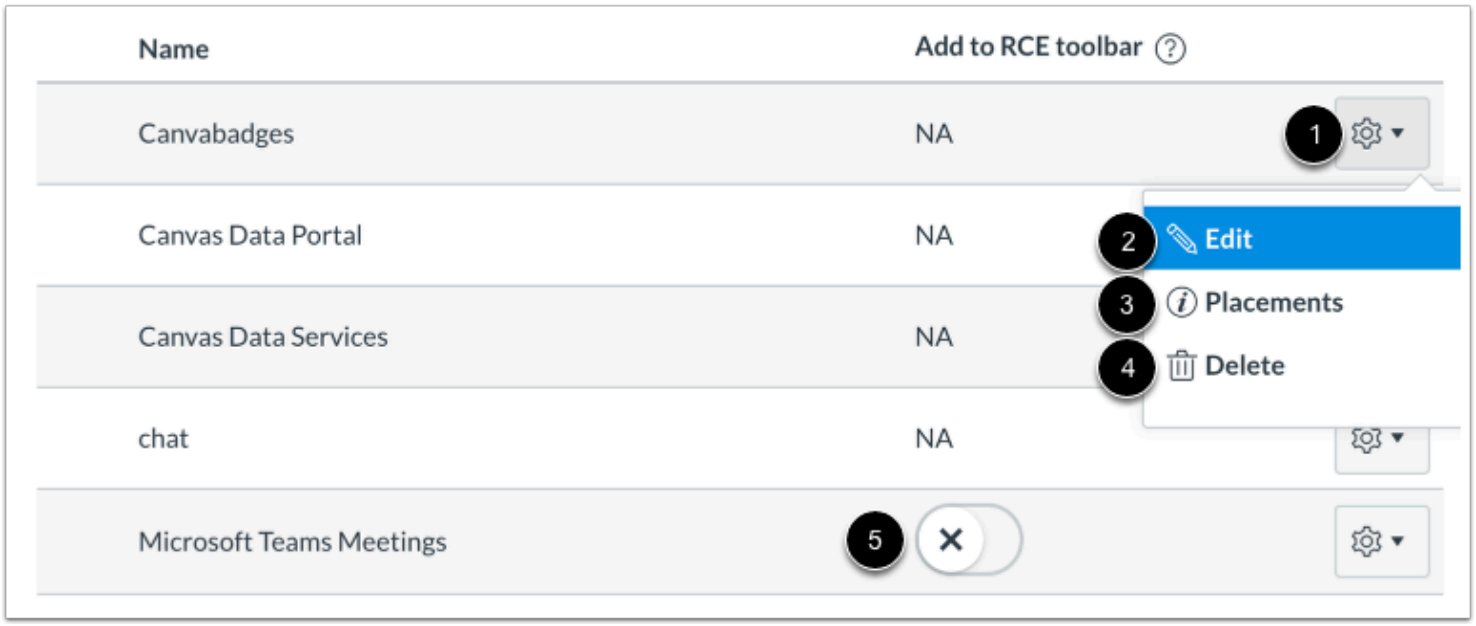
Verify App



If the app has already been added in the account, Canvas verifies that you still want to install the app. To continue, click the **Yes, Install Tool** button.

Note: Verifications only take place in the same context for an existing external app (such as installing the same app multiple times in the root account).

View App



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 manage app placements, click the **Placements** link [3]. To delete the app, click the **Delete** link [4].

To add an external app to the Rich Content Editor toolbar, click the **Add to RCE toolbar** toggle [5]. This option is only available for external tools that support placement in the Rich Content Editor.

Note: When you click the Placements link, you may see a No Placements Enabled message. This message indicates that the app does not have any specified placements within Canvas. However, the app will still work as intended.

How do I manage external app placements for an account?

You can manage placements for an external app in your account. Placements determine where an app can be seen and used in Canvas.

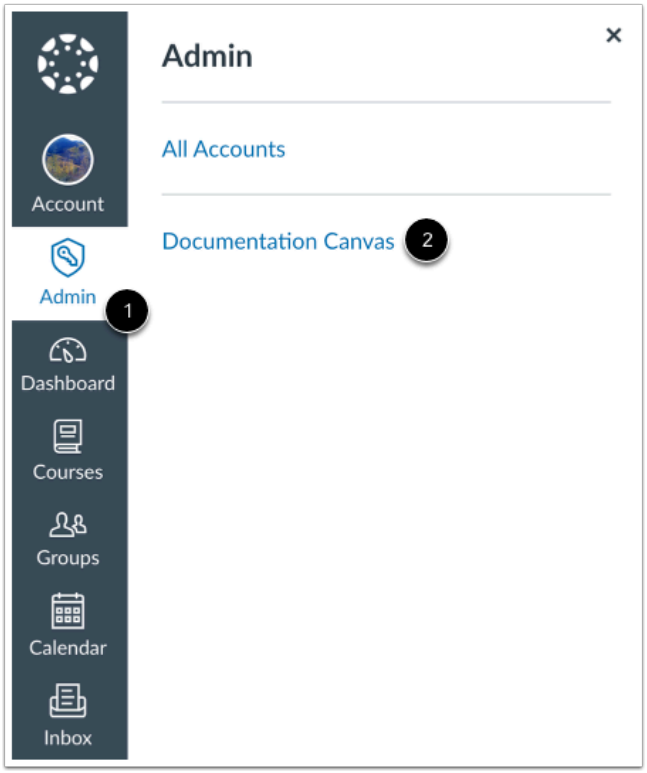
App placement categories include course navigation, account navigation, user navigation, homework submissions, Rich Content Editor button, migration selection, link selection (modules), assignment selection, and Top Navigation.

When managing app placements, placements can be set to active or inactive. Active placements display in the Canvas feature area listed in the App Placements menu. Inactive placements are removed from the Canvas feature area listed in the App Placements menu.

Notes:

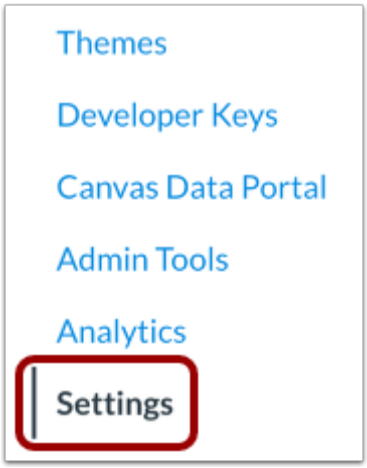
- Managing external app placements in the App Configuration page in account settings only applies to LTI 1.1 tools.
- When enabled, the Allow LTI Placements Toggle feature option allows you to configure the display of an LTI 1.3 tool in various user interface locations.

Open Account



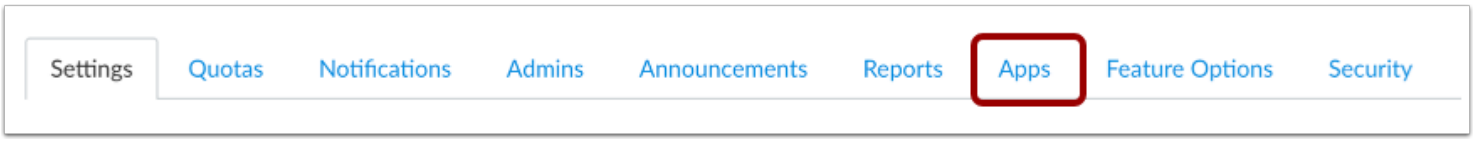
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



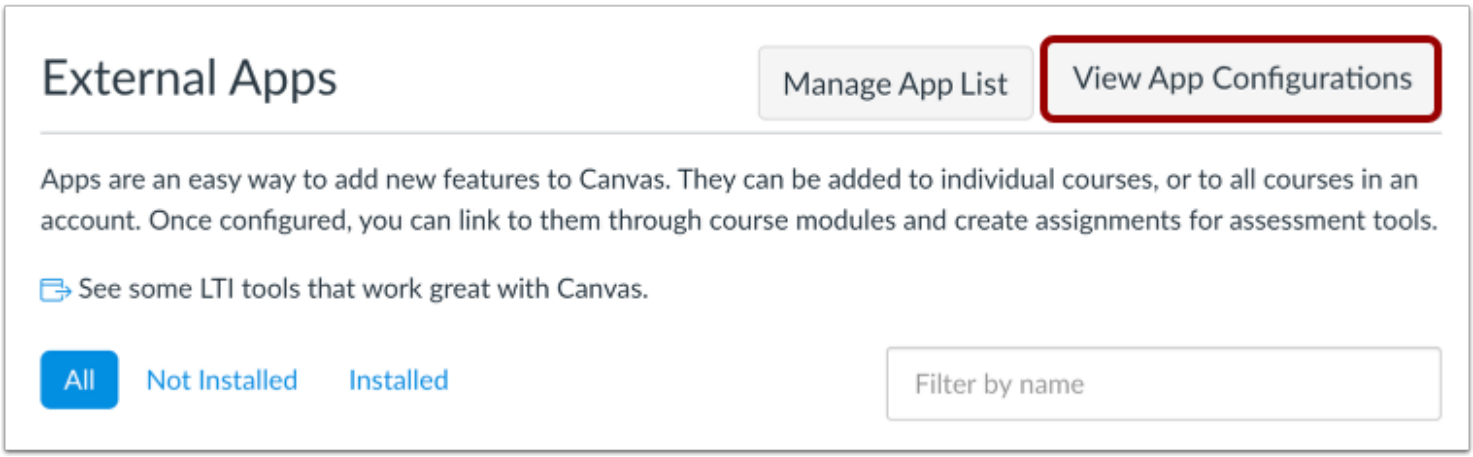
In Account Navigation, click the **Settings** link.

Open Apps



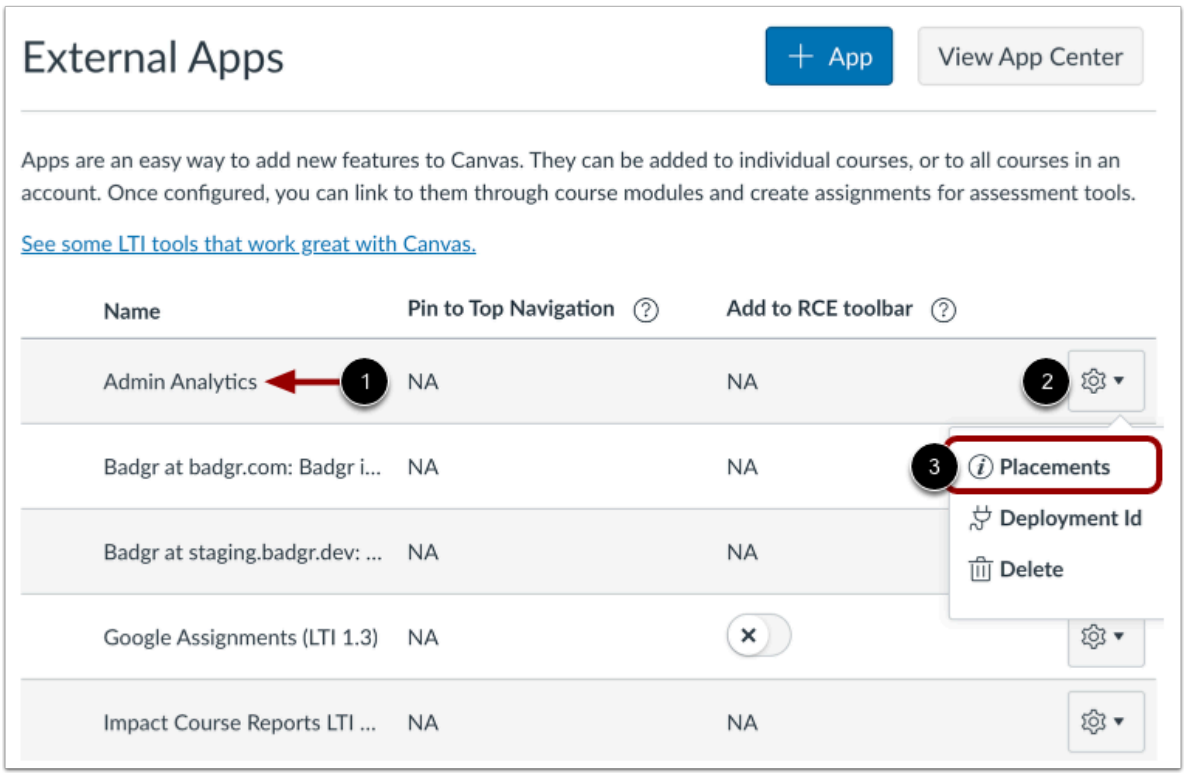
Click the **Apps** tab.

View App Configurations



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

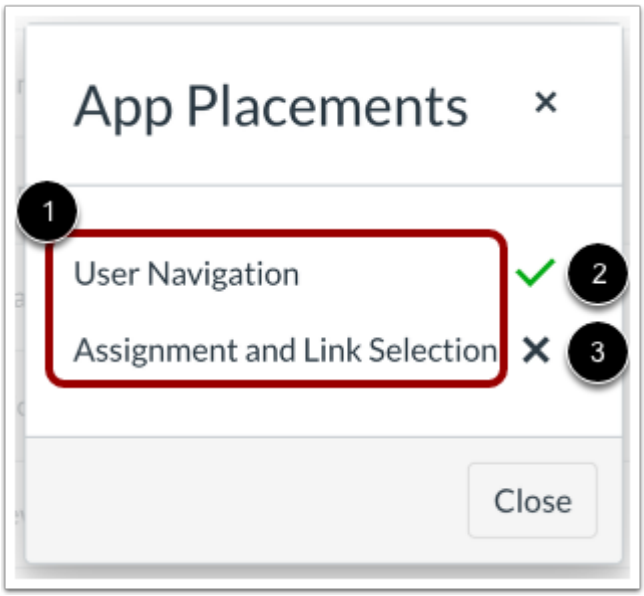
Open Placements



Locate the external app you want to manage [1]. Then click the **Settings** button [2] and select the **Placements** option [3].

Note: When you click the Placements link, you may see a No Placements Enabled message. This message indicates that the app does not have any specified placements within Canvas.

View Placements

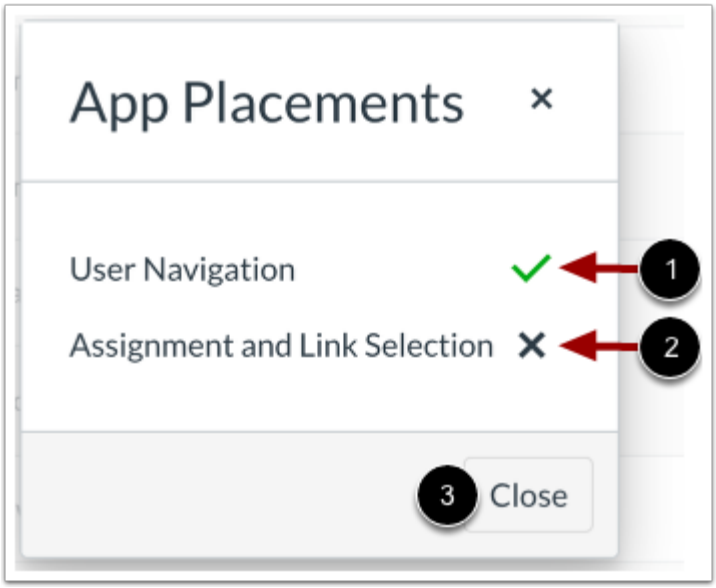


The App Placements menu displays all placements for the external app [1]. An active placement displays the **Checkmark** icon [2]. An inactive placement displays the **X** icon [3].

Depending on the LTI tool, the available app placement categories may vary. The following app placement categories are available for some external apps:

- Assignment Selection: Configure an LTI tool to be selectable as an assignment during assignment creation or editing.
- Editor Button: Configure an LTI tool to display as a button in the Rich Content Editor.
- Homework Submissions: Configure an LTI tool to display when a student is submitting content for an assignment. When a tool is configured, users will see an additional tab during assignment submission for assignments that accept online submissions.
- Link Selection: Configure an LTI tool to select LTI to launch URLs as module items.
- Navigation: Configure an LTI tool to display as a link in the navigation for a course, account, or user.
- Migration Selection: Configure an LTI tool to display in the Course Imports menu of a course.
- Submission Type Selection: Configure an LTI tool to display in the Submission Type drop-down menu during assignment creation.
- Top Navigation: Configure an LTI tool to display in the LTI Tools drop-down menu in Top Navigation.

Manage Placement



To disable an active placement, click the **Checkmark** icon [1]. To enable an inactive placement, click the **X** icon [2].

To close the App Placements menu, click the **Close** button [3].

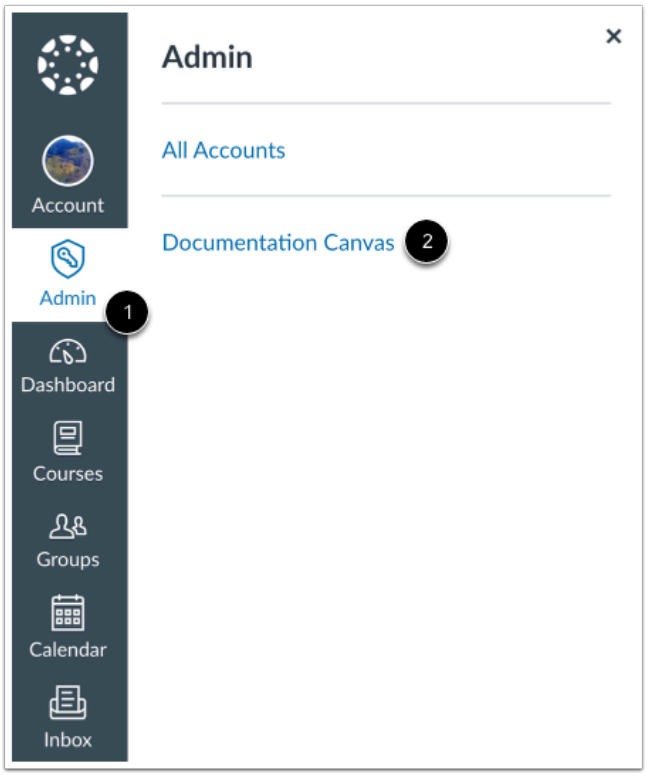
How do I add an external tool to the Top Navigation in an account?

When the Top Navigation LTI Placement feature option is enabled, an LTI Tools button displays on pages with a top navigation bar in Canvas for all users. This placement can be added to LTI 1.3 tools, and admin can pin up to two tools as favorites to display on the top-navigation bar. All other tools with this placement display in the LTI Tools dropdown menu in the top navigation.

Note:

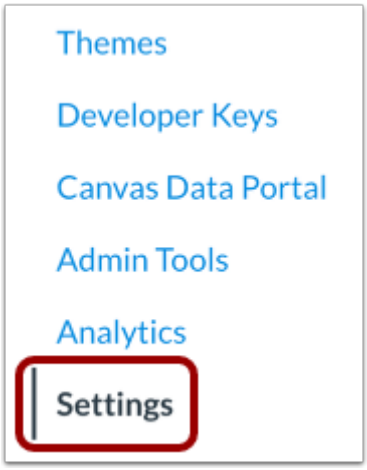
- Adding an external tool to the Top Navigation is an account permission. If you cannot add external tools to the Top Navigation, your institution has restricted this feature.
- The Top Navigation placement is a feature option that must be enabled for the account before the Top Navigation placement can be managed for external tools. More on enabling feature options in Canvas can be found in How do I manage feature options for an account?
- The Top Navigation placement is restricted. For more information institutions should contact their Customer Success Manager.

Open Account



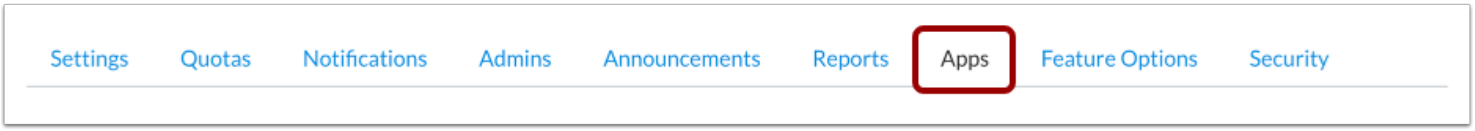
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



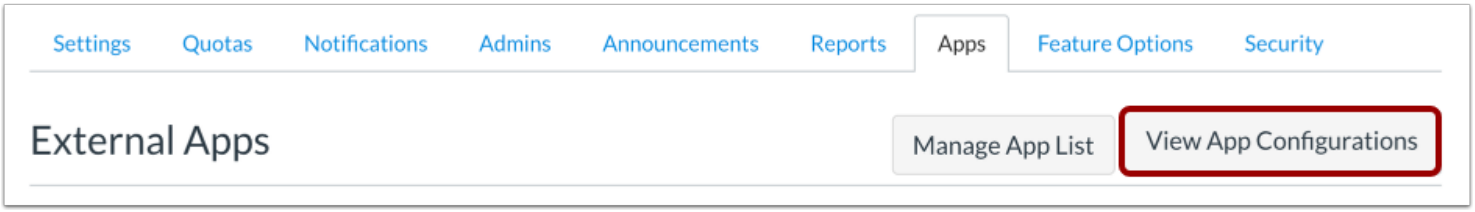
In Account Navigation, click the **Settings** link.

Open Apps



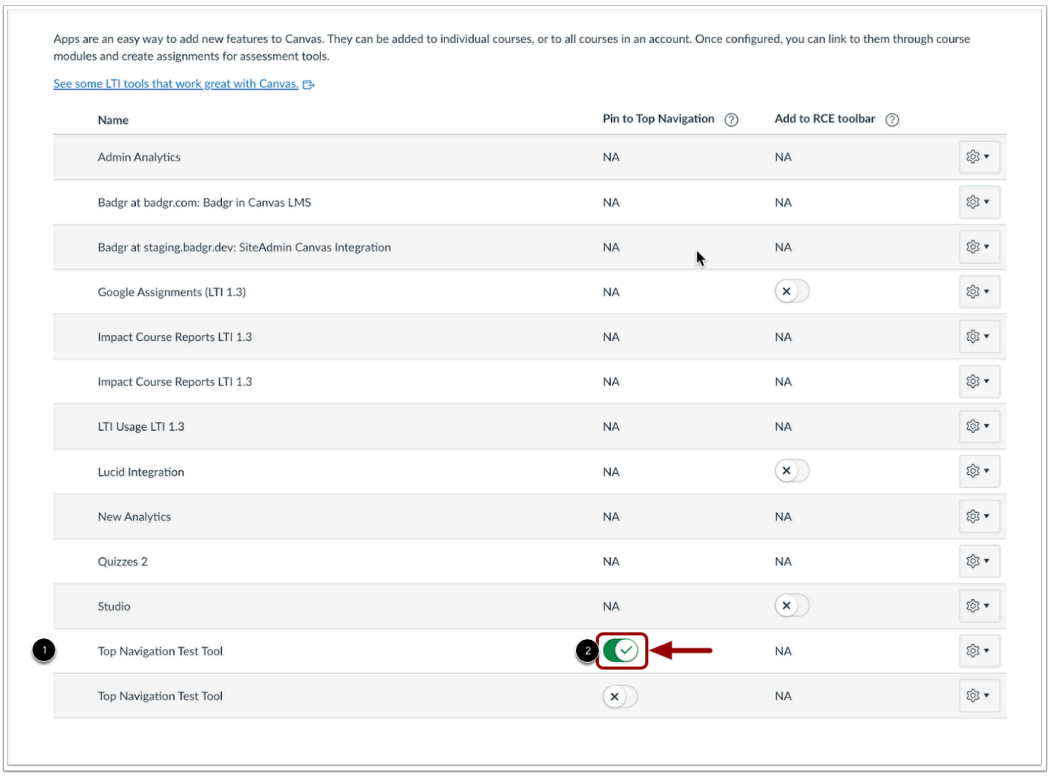
Click the **Apps** tab.

View App Configurations



Click the **View App Configurations** button.

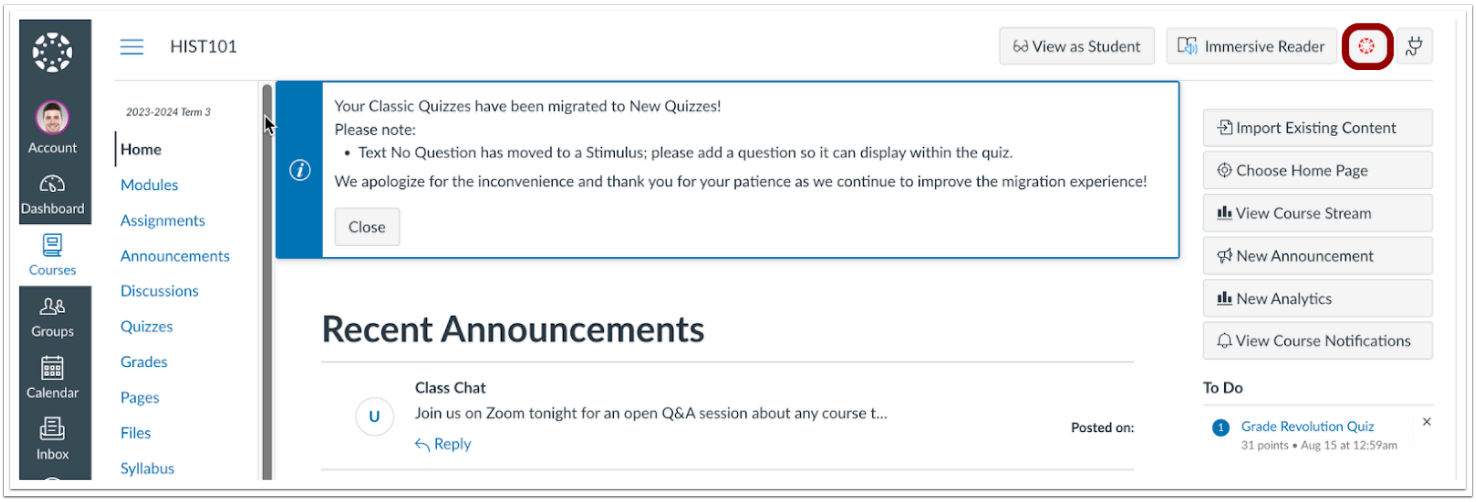
Pin Tool to Top Navigation



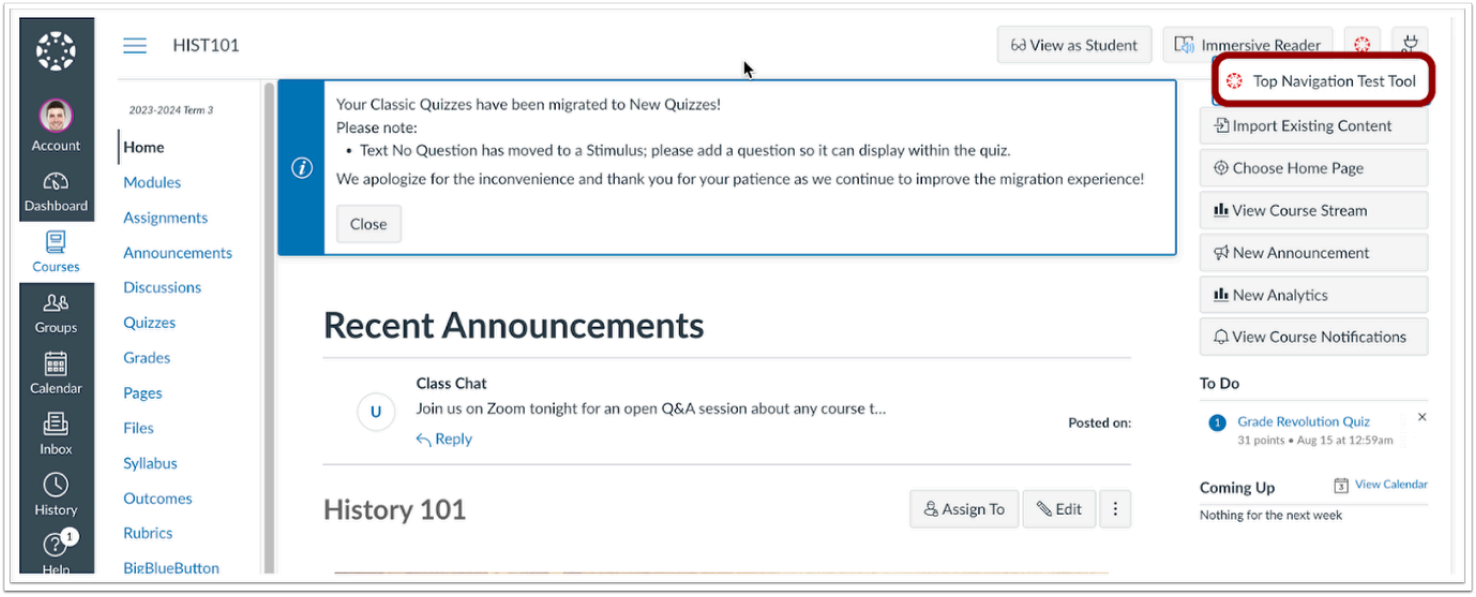
Find the external tool you want to add [1] and click its associated toggle [2]. The toggle will only display for external tools that support placement in the Top Navigation.

The Top Navigation only supports up to pinned two external tools. If two tools have been selected, all other toggles will lock and cannot be enabled.

View Top Navigation



Selected tool icons will display next to the LTI Tools Menu button on pages with a top navigation bar in Canvas for all users.



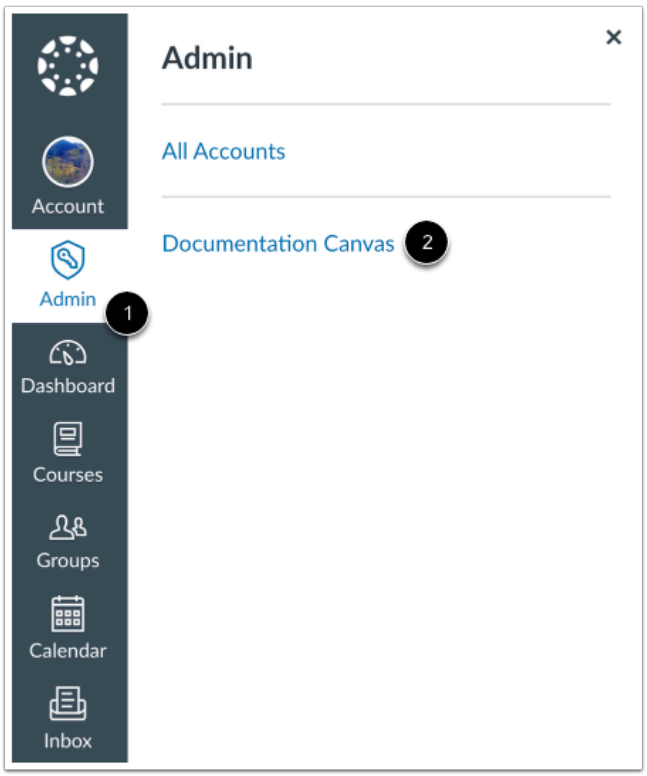
Any tools with a Top Navigation placement that are not pinned display in LTI Tools drop-down menu. The LTI Tools button displays on pages with a top navigation Bar in Canvas for all users.

How do I add an external tool to the Rich Content Editor toolbar in an account?

As an admin, you can select up to two external tools to display in the Rich Content Editor toolbar for all users in your account. You must have the LTI-edit permission to configure this setting. The selected tool icons will appear next to the Apps icon.

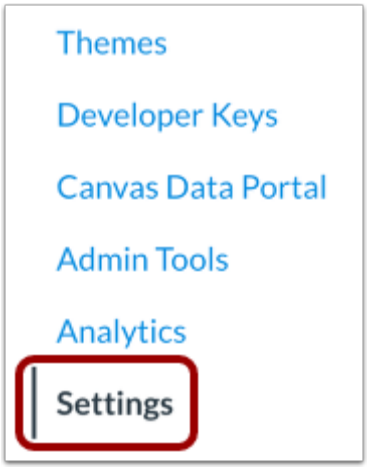
Note: Adding an external tool to the Rich Content Editor toolbar is an account permission. If you cannot add external tools to the Rich Content Editor, your institution has restricted this feature.

Open Account



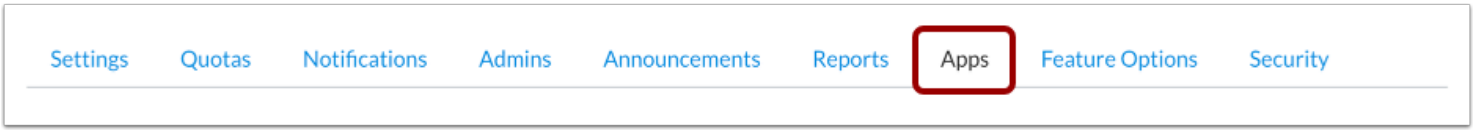
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



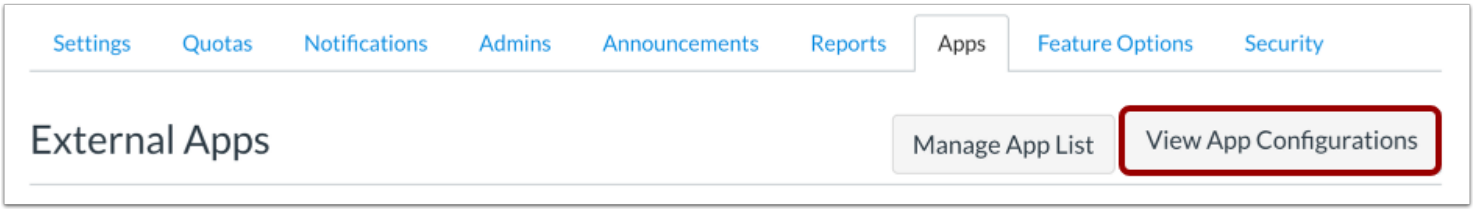
In Account Navigation, click the **Settings** link.

Open Apps



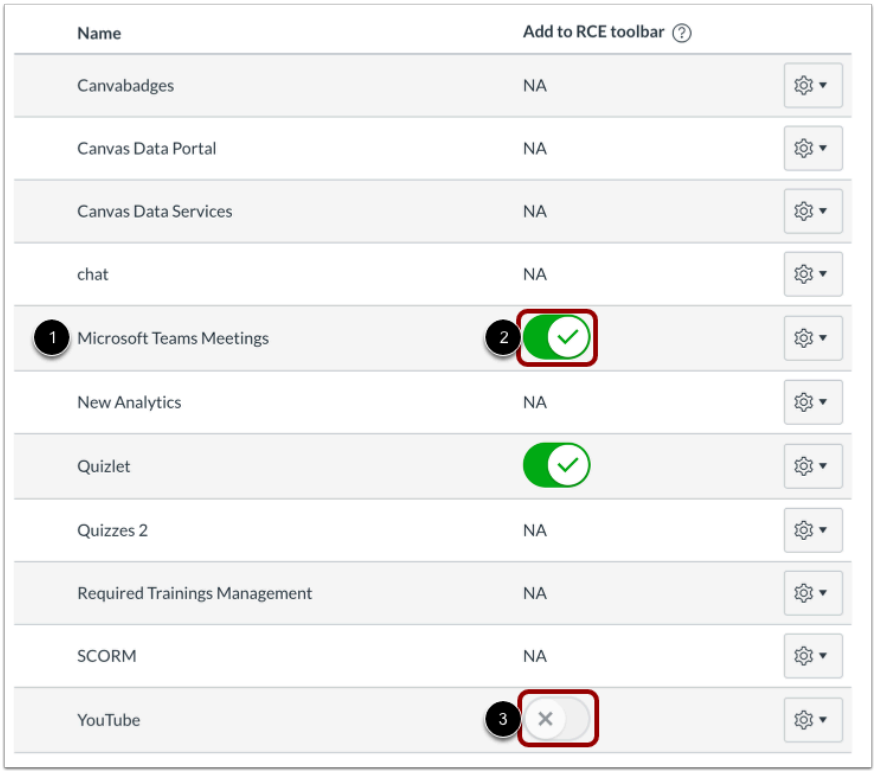
Click the **Apps** tab.

View App Configurations



Click the **View App Configurations** button.

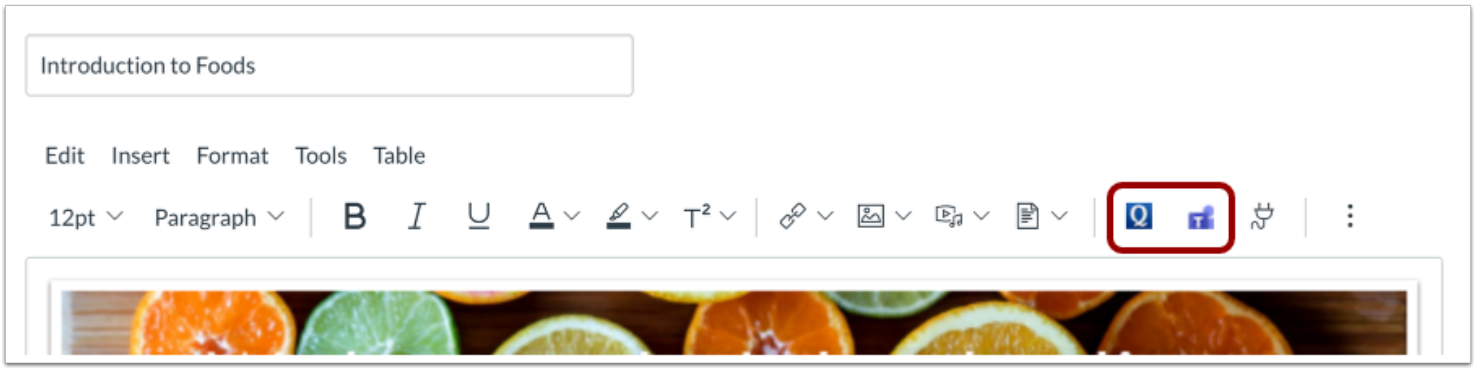
Add Tool to RCE Toolbar



Find the external tool you want to add [1] and click its associated toggle [2]. The toggle will only display for external tools that support placement in the Rich Content Editor.

The Rich Content Editor only supports up to two external tool icons in the toolbar. If two tools have been selected, all other toggles will lock and cannot be enabled [3].

View Rich Content Editor



Selected tool icons will display next to the Apps icon in the Rich Content Editor toolbar for all users in your account.

Note: If an external tool is configured using an LTI key and did not include an icon in the Editor Button placement, the app's icon displays with the first initial of the tool's name in the Rich Content Editor.

How do I enable the Course Analytics Online Attendance report in an account?

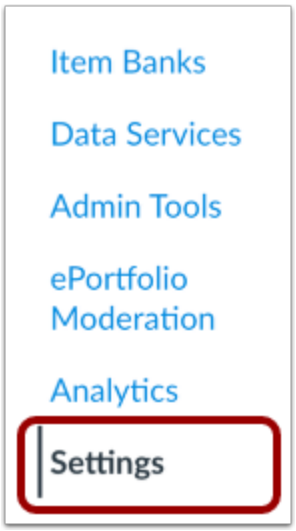
As an admin, you can enable an Online Attendance report for courses that have enabled Course Analytics. Once it is enabled, you can select attendance criteria from the Online Attendance Report settings.

The Online Attendance report displays students as present or absent based on whether they have met any of the selected attendance criteria on a given day.

Notes:

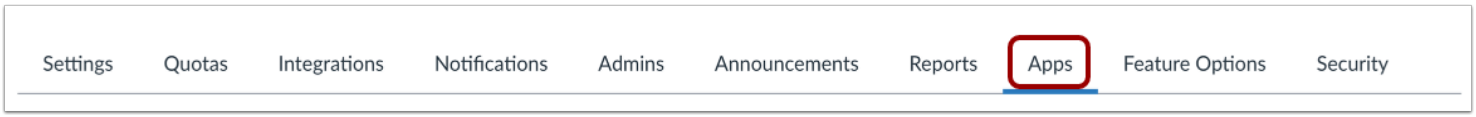
- The Online Attendance report cannot be managed at the sub-account level.
- Data is refreshed in Course Analytics every 24 hours. Please confirm the time data was last updated in the course, as content may be outdated compared to recent course activity and student submissions.
- When you allow instructors to set their own Online Attendance criteria, the Manage LTI permission is no longer required for instructors.

Open Settings



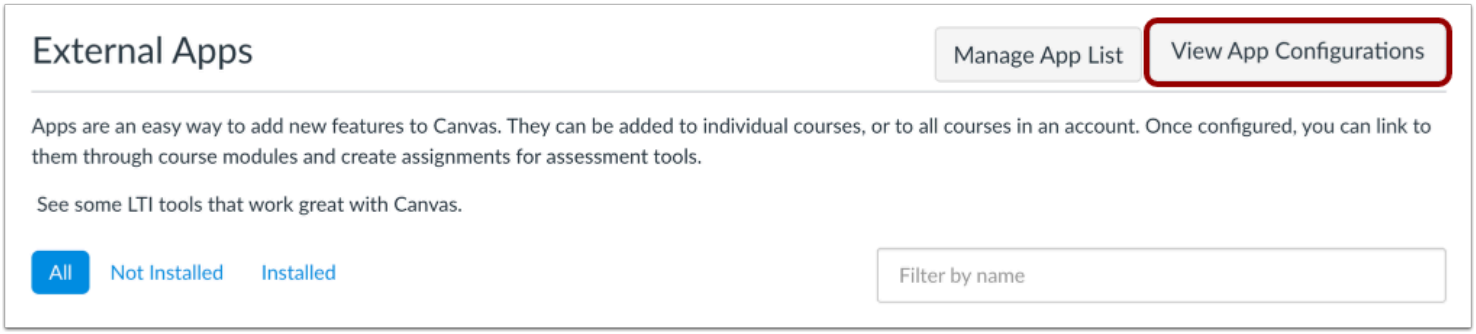
In Account Navigation, click the **Settings** link.

Open Apps



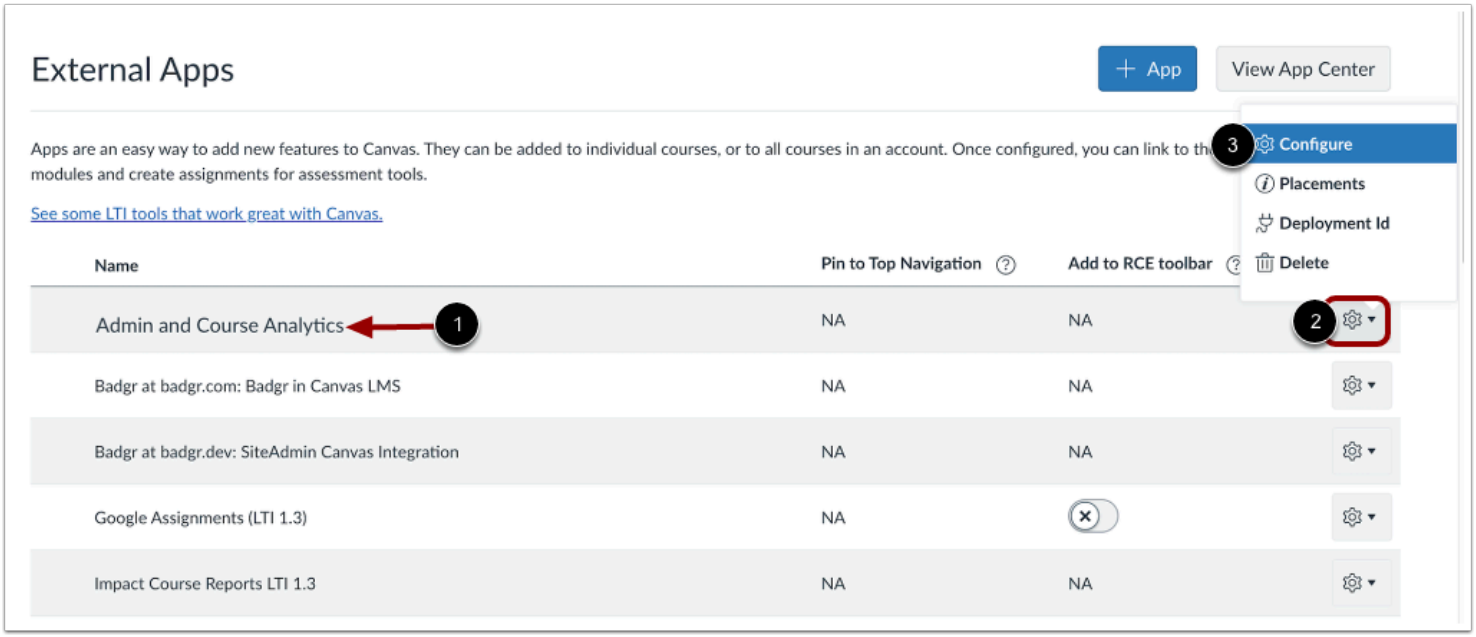
Click the **Apps** tab.

View App Configurations



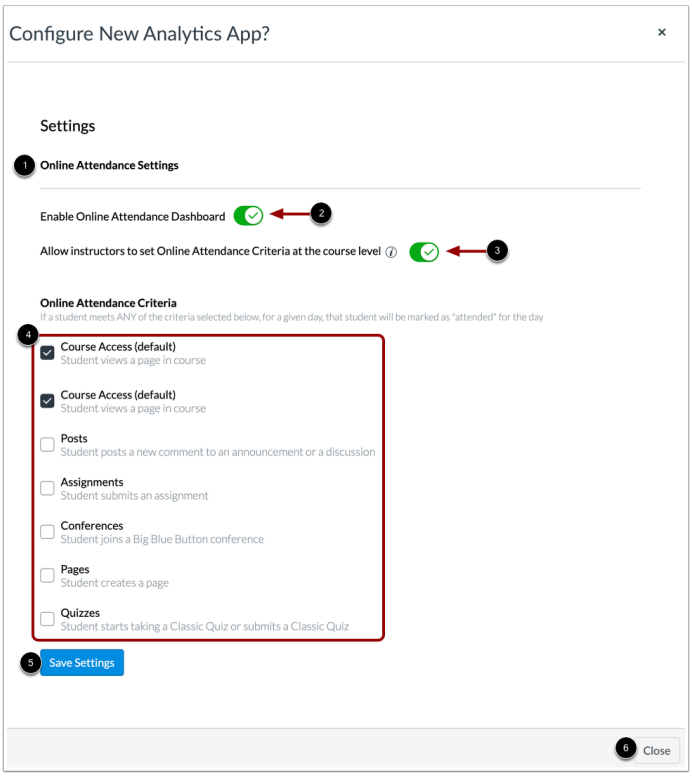
Click the **View App Configurations** button.

Open App Settings



In the External Apps list, locate the **Admin and Course Analytics** app [1]. Click the **Settings** button [2] and select the **Configure** option [3].

Configure Online Attendance Report



The **Online Attendance** settings display in the page [1].

To enable the Online Attendance report, click the **Enable Online Attendance Dashboard** button [2].

To allow instructors to set attendance criteria at the course level, click the **Allow instructors to set Online Attendance Criteria at the course level** button [3]. Additionally, the instructor role must have the Manage LTI permission enabled.

To select the criteria that determine online attendance, click the **Attendance Criteria** checkboxes [4]. You can select the following criteria:

- Course Access: student views a page in a course
- Posts: student posts a new comment to an announcement or a discussion
- Assignments: student submits an assignment
- Collaborations: student loads a collaboration to view/edit document
- Conferences: student joins a web conference
- Pages: student creates a page
- Quizzes: student starts taking a quiz or submits a quiz

If a student meets the requirements of any selected criteria, they will be marked as present for that day in the Online Attendance report.

To save your Online Attendance settings, click the **Save Settings** button [5]. To close the settings window without saving, click the **Close** button [6].

Notes:

- The Conferences criteria only applies to BigBlueButton conferences.
- The Quizzes criteria only applies to Classic Quizzes.

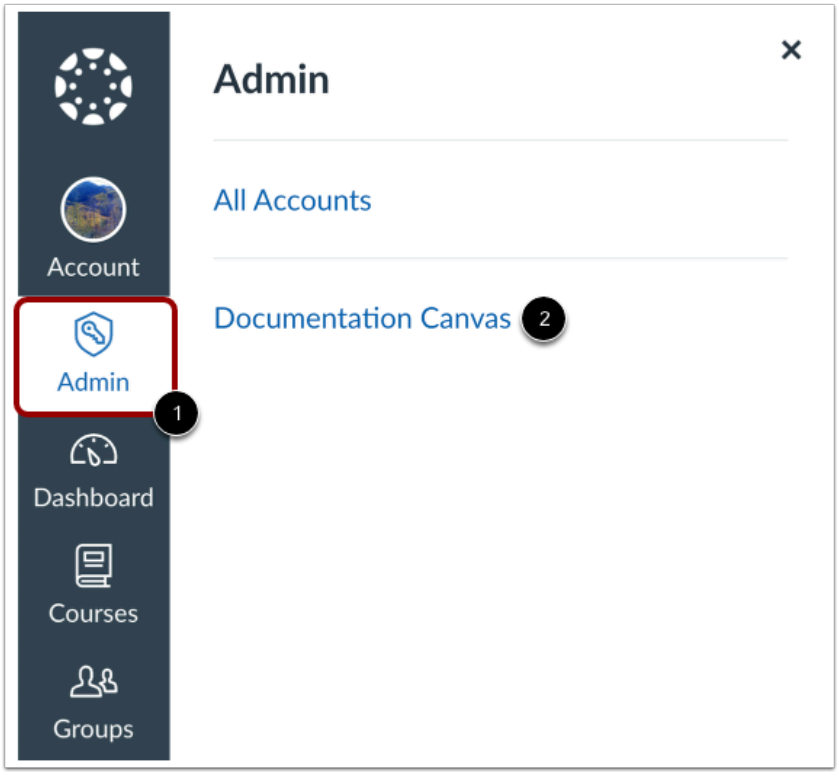
Canvas Apps

How do I view and filter external apps (LTI) data for my institution in Canvas Apps?

As a Canvas root admin, you can view, filter, compare and understand which LTI apps are being used by whom, when, and how often.

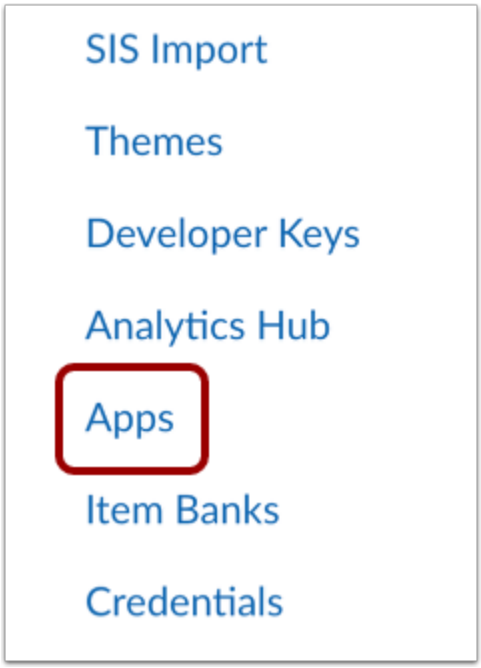
Note: Only data for the most commonly used LTI apps is available for all Canvas Admins as part of this feature.

Open Account



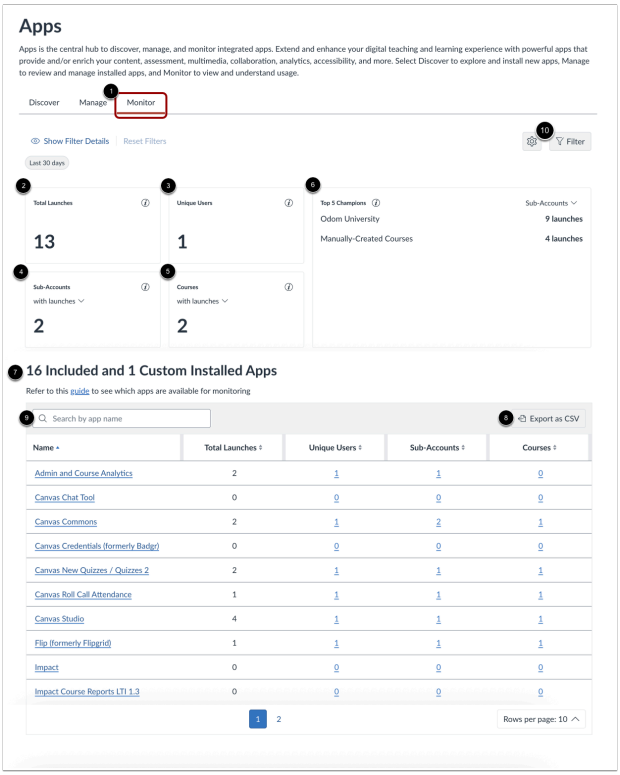
In Global Navigation, click the **Admin** link [1] and then click the name of the account [2].

Open Apps



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

View App Data



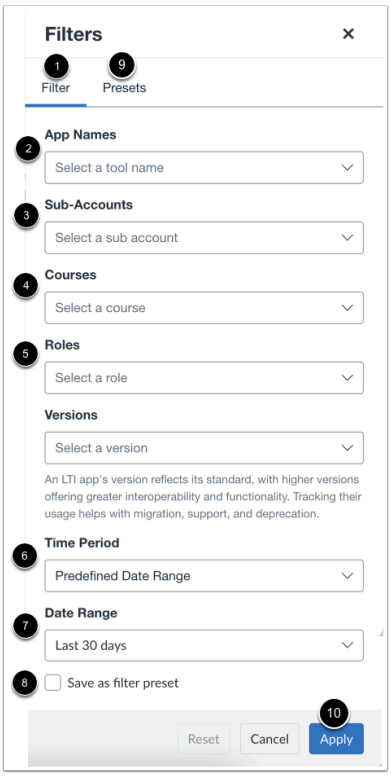
In the Apps page, click the **Monitor** tab [1].

You can view the total launches [2], unique users [3], sub-accounts [4], courses [5], Top 5 Champions [6], and a list of all installed apps [7]. To download a copy of the data, click the **Export as CSV** button [8].

To search for an app, enter the app name in the **Search** field [9].

To filter the data, click the **Filter** button [10].

Apply Filters



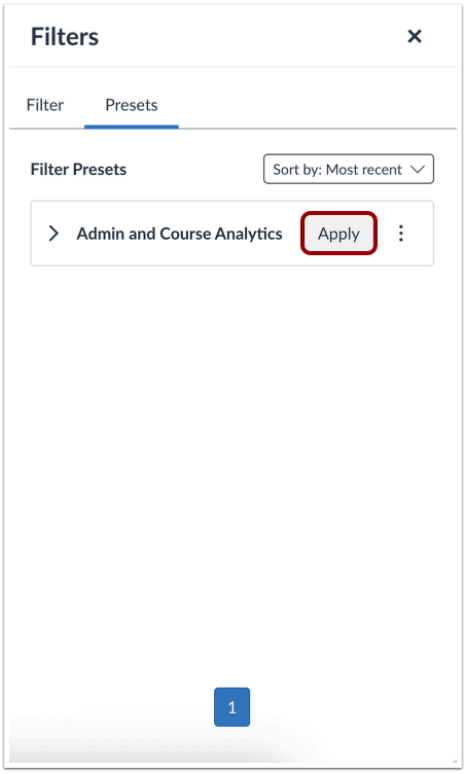
You can filter data by app names [1], sub-accounts [2], courses [3], roles [4], LTI app version [5], time period [6], and date range [7].

To save filter options as a preset, click the **Safe as filter preset** checkbox [8].

To view presets, click the **Presets** tab [9].

Click the **Apply** button [10].

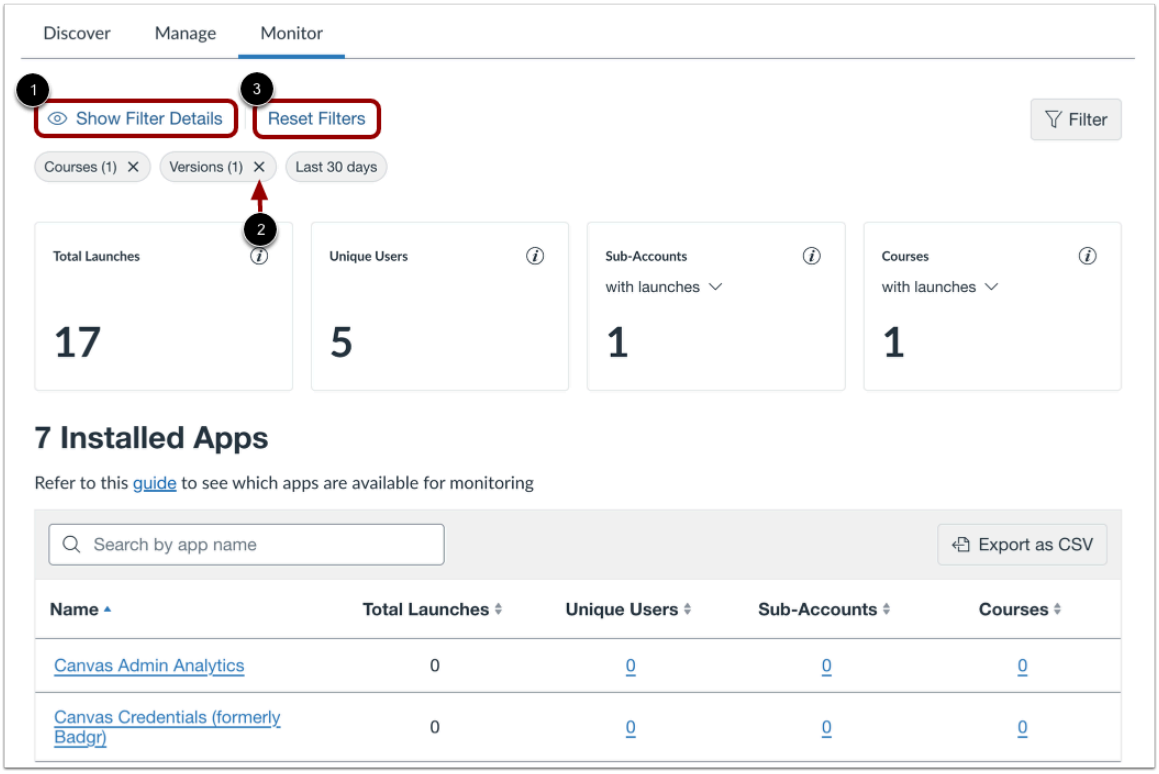
Apply Preset Filter



To apply a preset filter, locate the filter preset and click the **Apply** button.

Note: For more information on preset filters, visit How do I create a preset filter for Monitor LTI Usage?

View, Remove, or Reset Filters



To view the filter details, click the **Show Filter Details** link [1].

To remove a filter, click the **Delete** icon [2].

To remove all filters, click the **Reset Filters** link [3].

How do I add an app on the Discover page in Canvas Apps?

Canvas Apps is the central hub to discover, manage, and monitor integrated apps. This feature aims to extend and enhance digital teaching and learning experience with powerful apps that provide and/or enrich content, assessment, multimedia, collaboration, analytics, accessibility, and more.

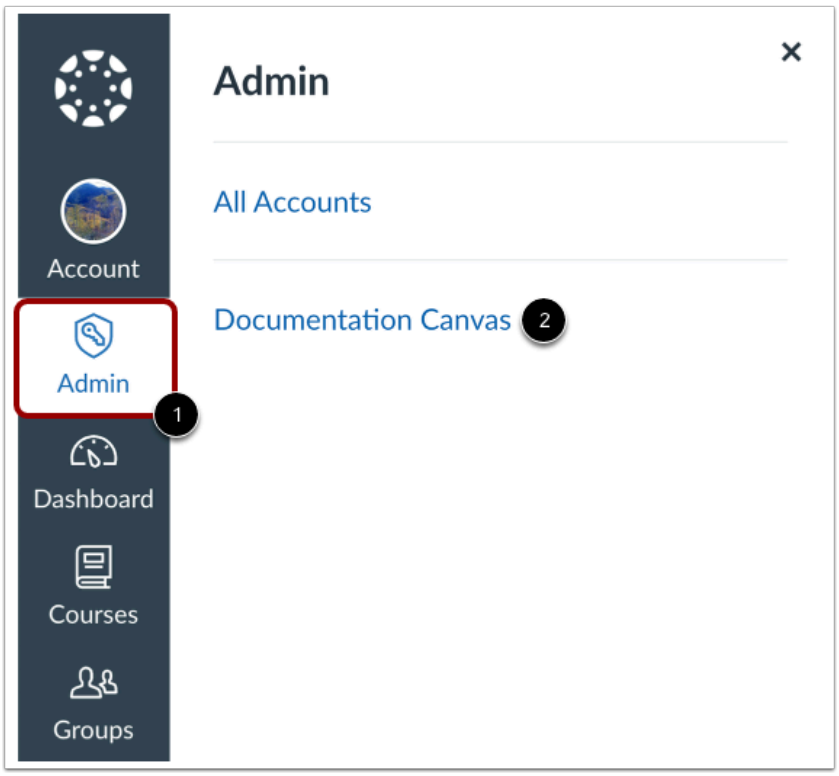
If you are a Canvas root admin with the LTI Registrations - Manage permission, you can add an external app (LTI tool) from the Discover tab in the Canvas App page.

The Discover tab displays Canvas-integrated apps. The front page highlights only LTI 1.3 integrated apps, but you can view all available apps using the Search field or the Filters button. Most tools display a category which gives an indication of the type of tool and how it could be used.

The listings include apps which were previously accessed as inherited developer keys. If you wish to find more information about the tool provided by the vendor, including any accessibility and privacy documentation they have provided, click the app tile.

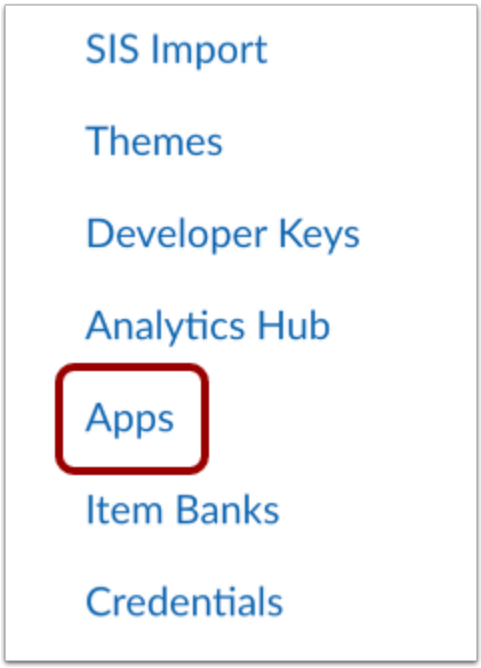
Note: Canvas Apps is available in Account Navigation and enabled for all institutions.

Open Account



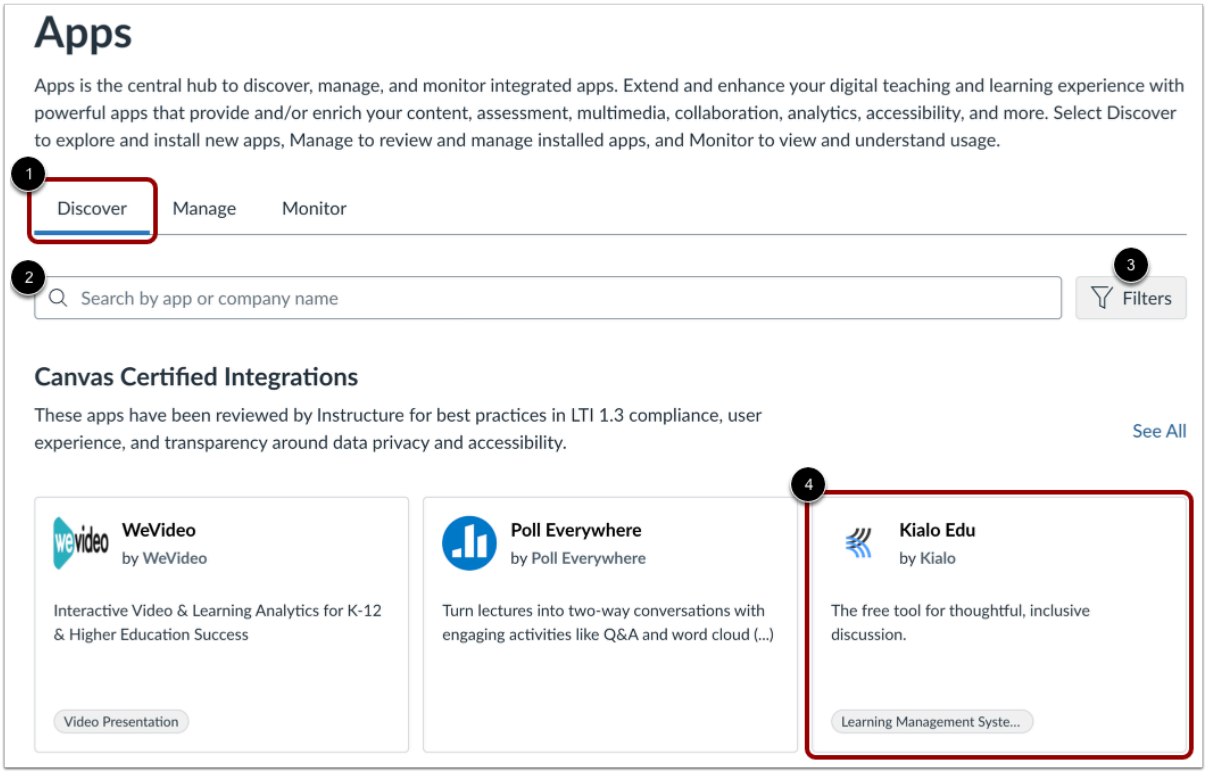
In Global Navigation, click the **Admin** link [1] and then click the name of the account [2].

Open Apps



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

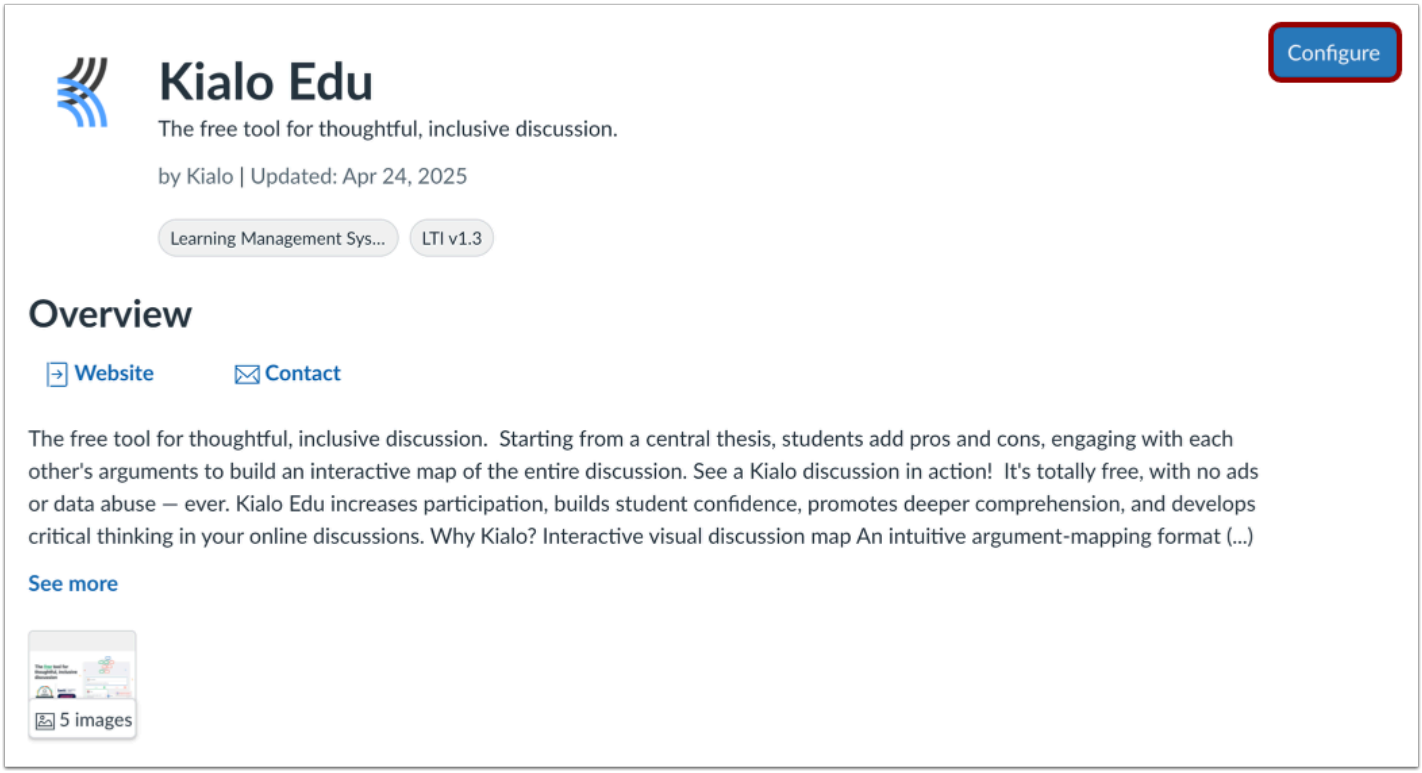
Locate App



By default, the Discover page displays [1]. To locate the app you wish to add, you can enter the app name in the **Search** field [2], apply filters by clicking the **Filter** button [3], or scroll the page.

Click the app tile [4].

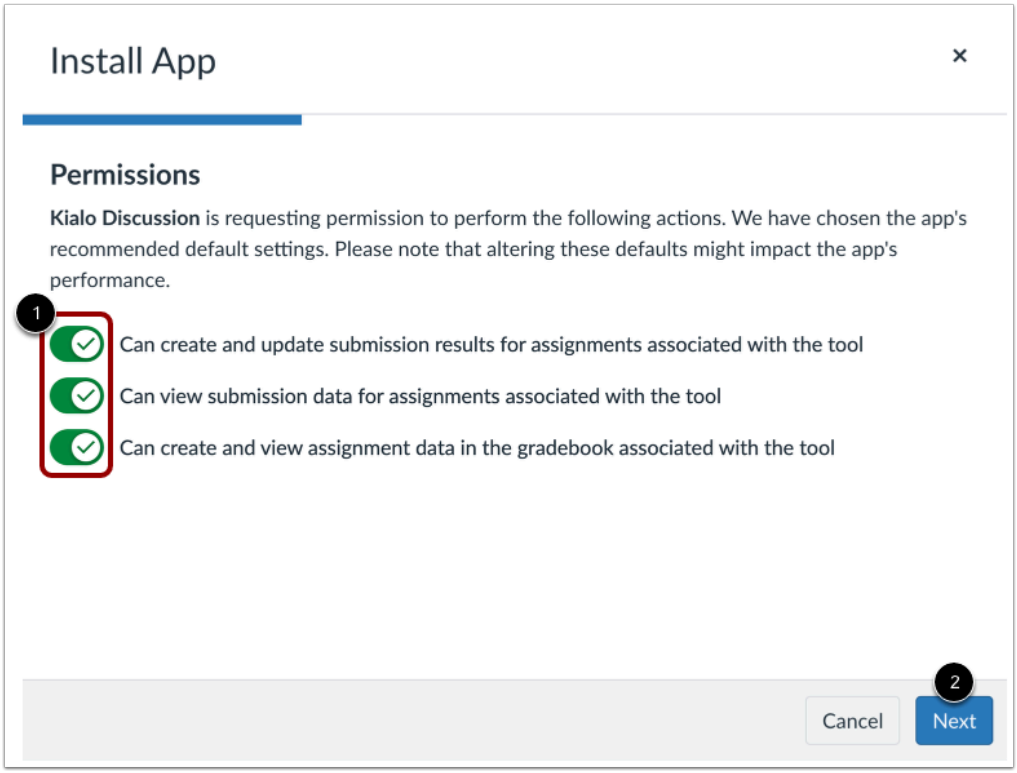
Configure App



Click the **Configure** button.

If no configuration information is available, you may need to add the app manually, or by using JSON, JSON URL, or Dynamic Registration.

Set Permissions

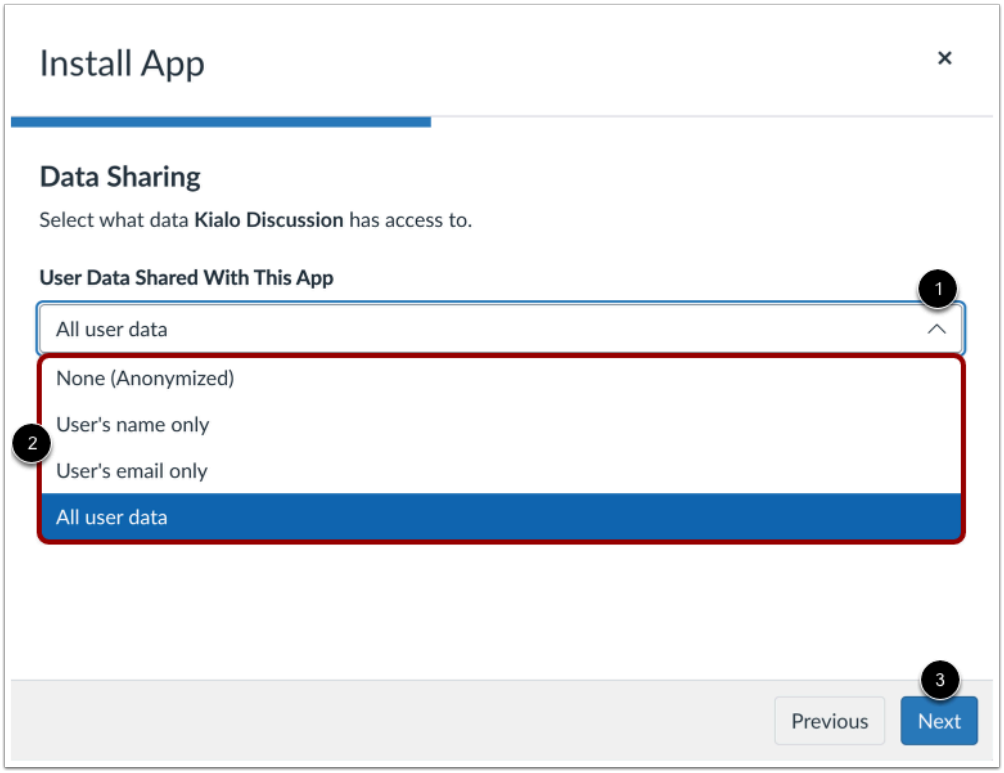


The available permissions for the tool' display. By default, all permissions are enabled.

To disable the permission, click the **Permission** toggle off [1].

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

Set User Data-Sharing

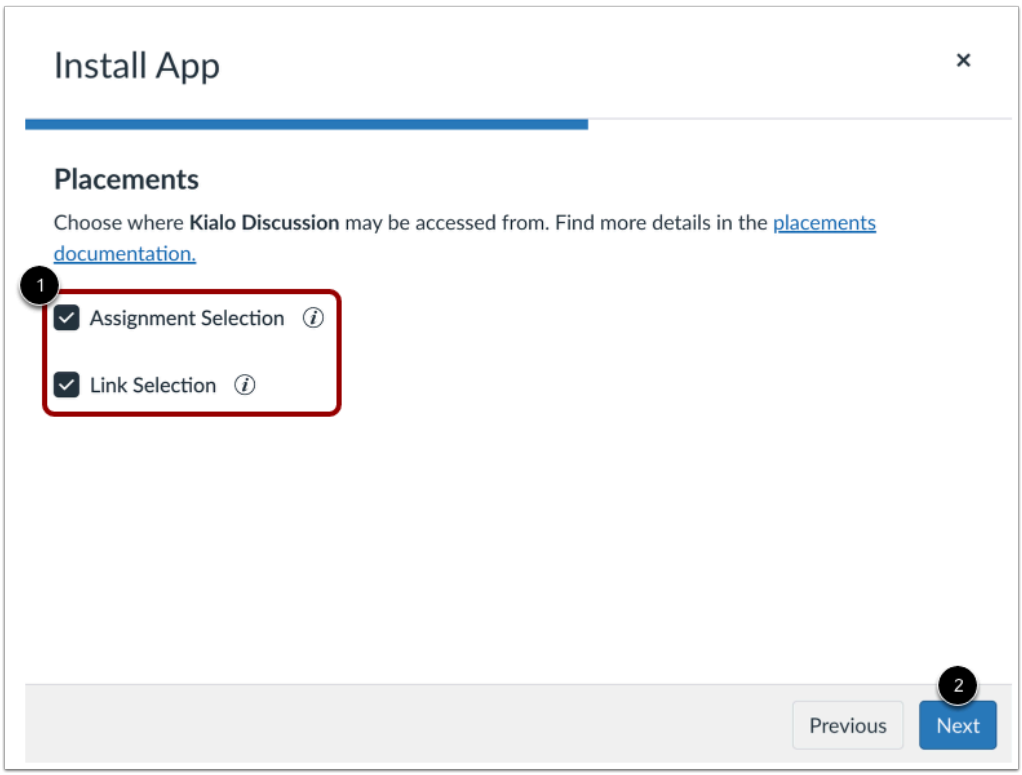


Click the **User Data Shared With This App** drop-down menu [1] and then select what data the tool can access [2]. Options include:

- None (Anonymized)
- User's name only
- User's email only
- All user data

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

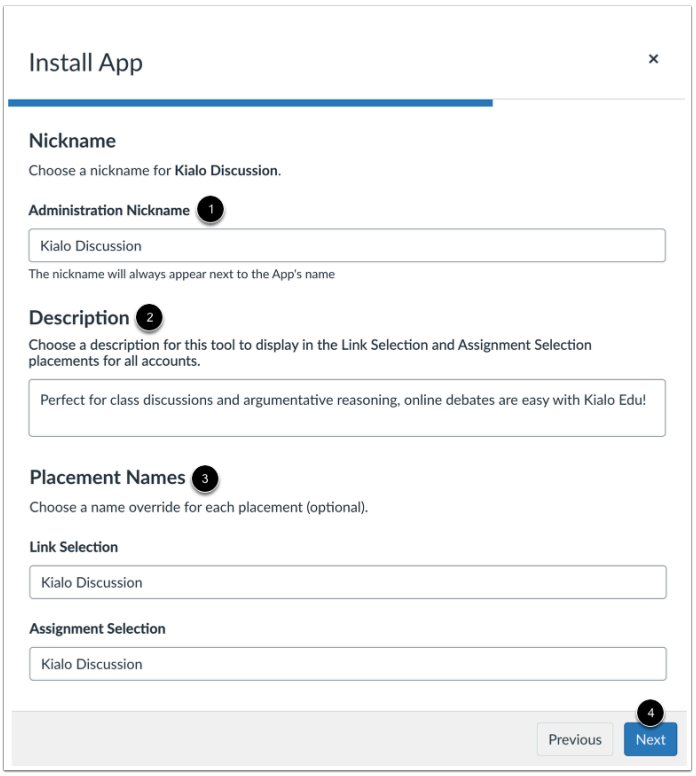
Set Placements



Select where the app can be accessed from [1] and then click the **Next** button [2].

Note: Each placement has an Information icon which shows a screenshot of the location in Canvas as well as a text description of it.

Add Nickname

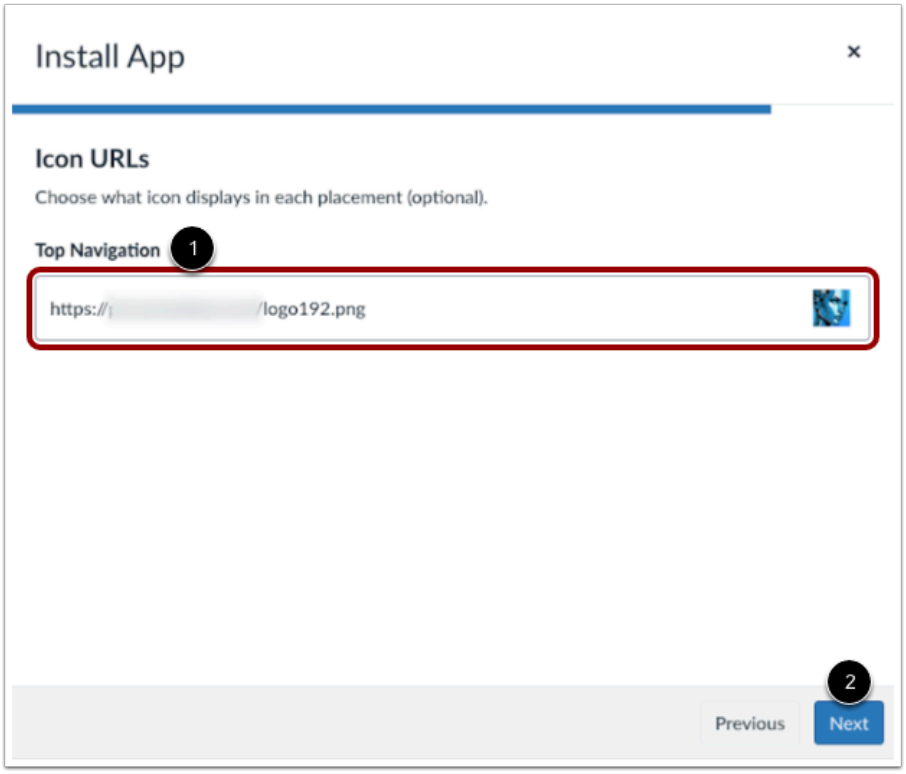


You can add a nickname for the app [1], a short description [2], and a name for each placement [3]. Then, click the **Next** button [4].

Notes:

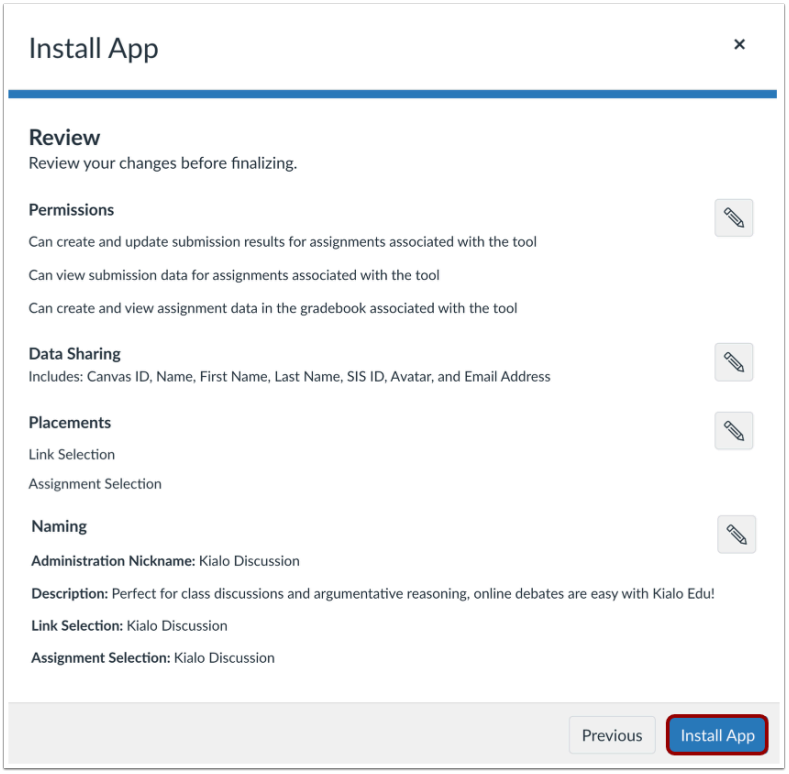
- The Nickname displays in the Manage page. You can use this to indicate any specifics about the tool that helps you identify it such as a campus, sub-account, or other feature.
- The Description field allows you to create a description for users of the tool to see in placements where it is enabled. You may also optionally label the tool differently in certain placements.

Configure Icons



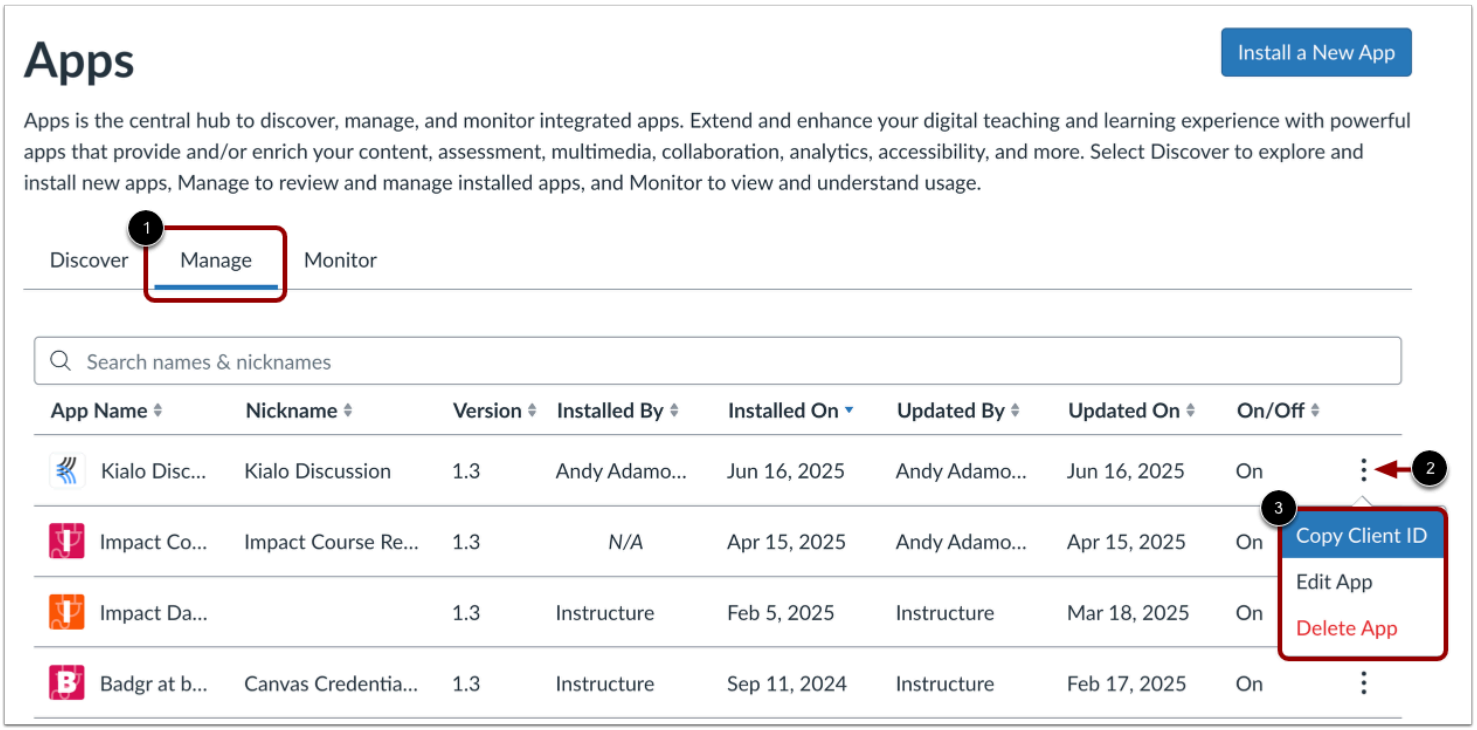
If available, the app's icon URLs display. If the tool has a placement which will display a logo in Canvas, you may add the logo on this screen [1]. Then, click the **Next** button.

Review and Install App



Review all the details and then click the **Install App** button.

Manage App



After installation, the app appears in the Manage tab [1]. To manage the app, click the **Options** icon [2]. You can copy the client ID, edit the app, or delete the app [3].

You can also make the app available in the whole account or in specific courses using a client ID.

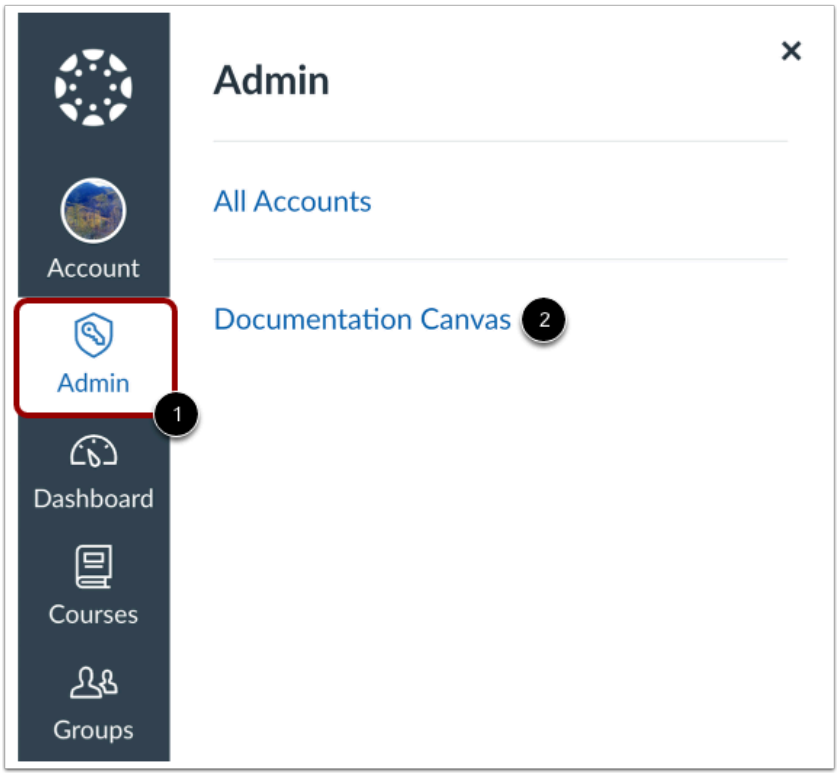
How do I add an app manually in Canvas Apps?

Canvas Apps is the central hub to discover, manage, and monitor integrated apps. This feature aims to extend and enhance digital teaching and learning experience with powerful apps that provide and/or enrich content, assessment, multimedia, collaboration, analytics, accessibility, and more.

If you are a Canvas root admin with the LTI Registrations - Manage permission, you can add an external app (LTI tool) manually in the Canvas App page.

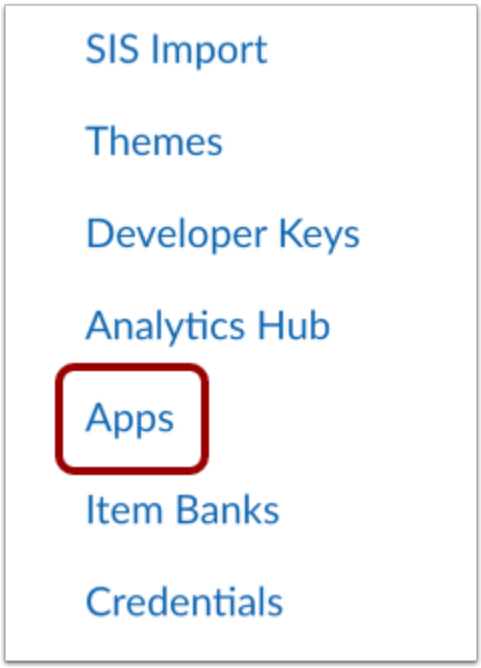
Note: Canvas Apps is available in Account Navigation and enabled for all institutions.

Open Account



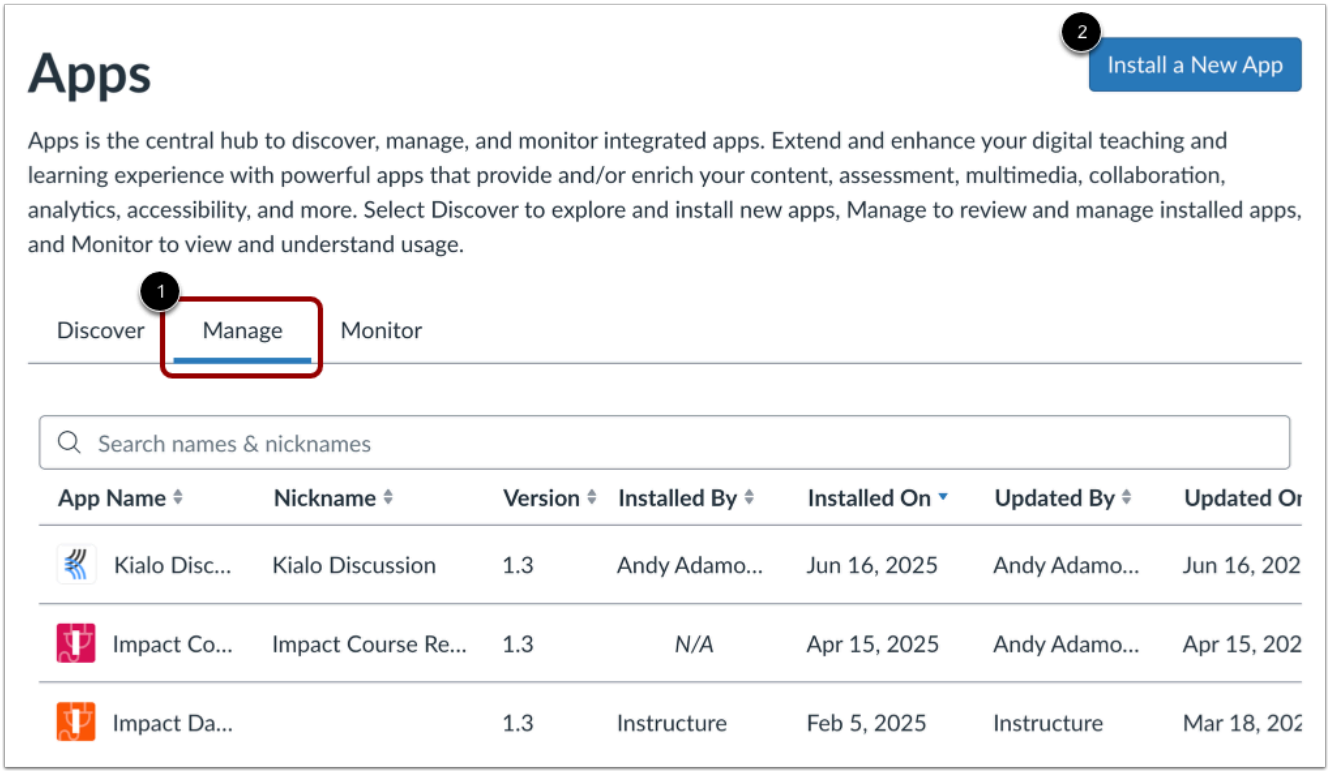
In Global Navigation, click the **Admin** link [1] and then click the name of the account [2].

Open Apps



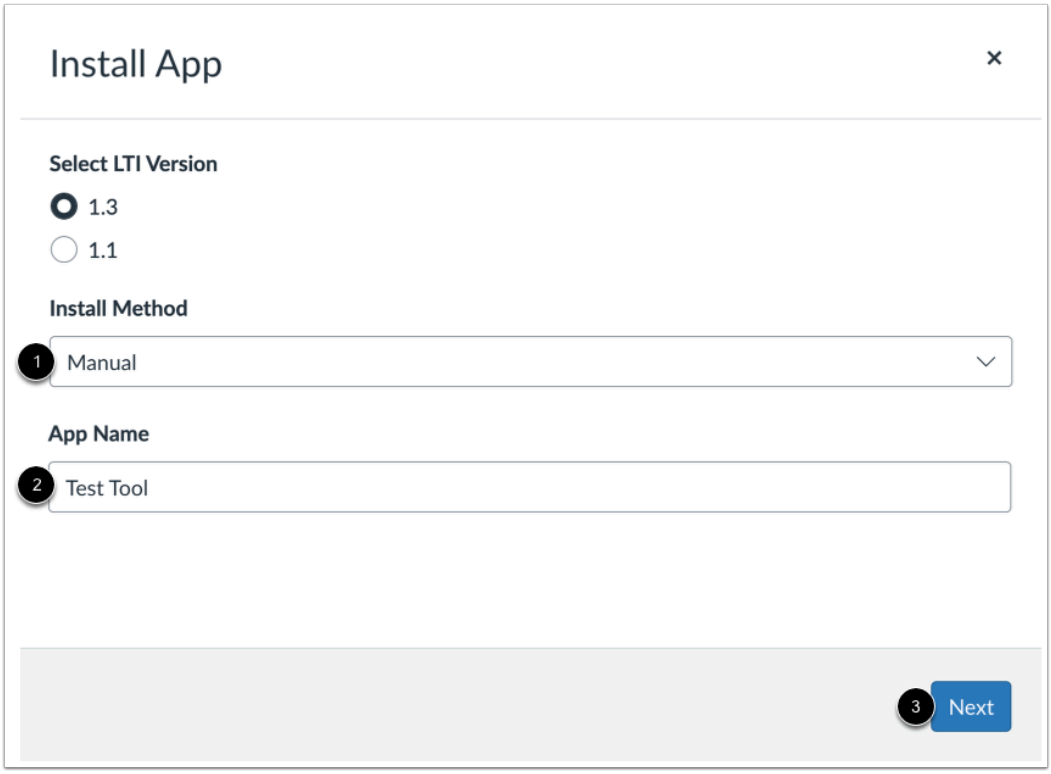
In Account Navigation, click the **Apps** link.

Add New App



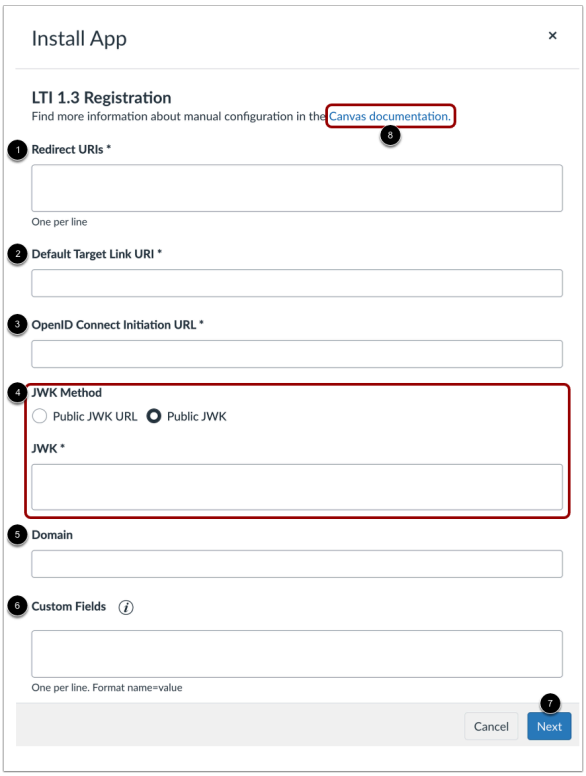
In the **Manage** tab [1], click the **Install a New App** button [2].

Select Install Method and Add App Name



In the Install Method drop-down menu, select the **Manual** option [1]. Add a name for your app [2], and then click the **Next** button [3].

Complete LTI 1.3 Registration



The LTI 1.3 Registration window displays the technical details needed for the configuration including the URIs used to identify resources from the tool, launch the tool, and authenticate the tool.

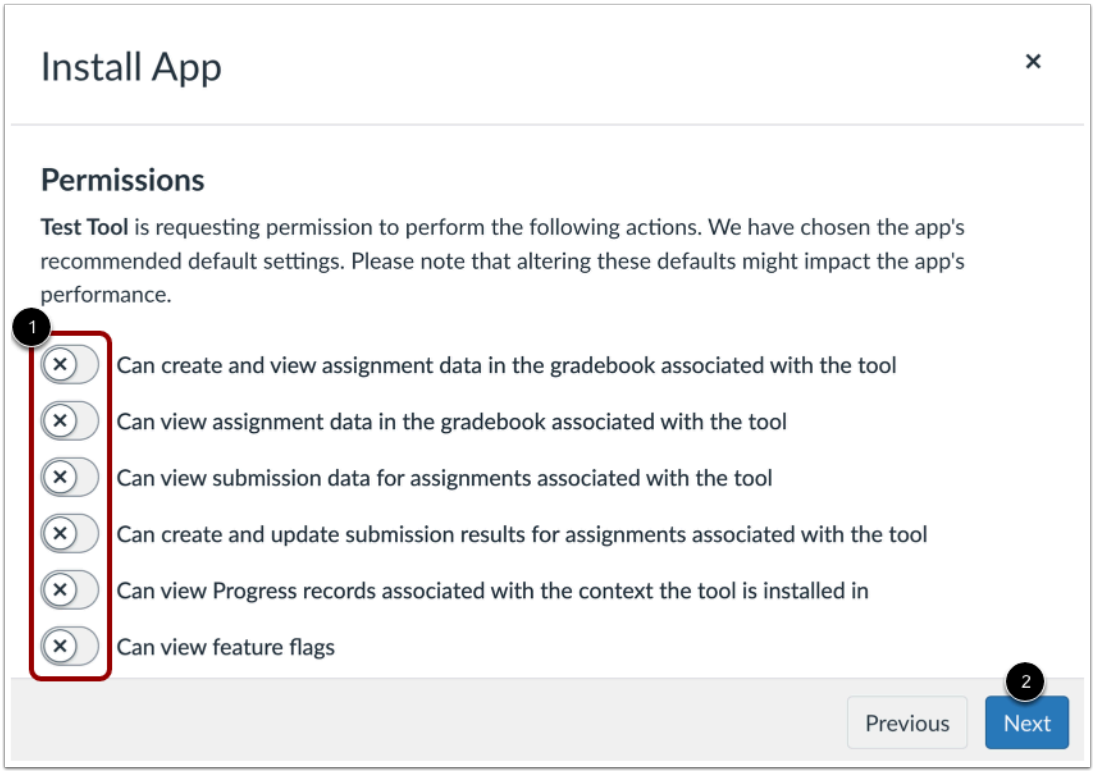
Complete the following fields:

- **Redirect URIs** [1]
- **Default Target Link URI** [2]
- **OpenID Connect Initiation URL** [3]
- Select the **JWK Method** and then enter the JWK in the text field. [4]
- **Domain** [5]
- **Custom Fields** [6]

Click the **Next** button [7].

To learn more about manual configuration, click the **Canvas documentation** link [8].

Set Permissions

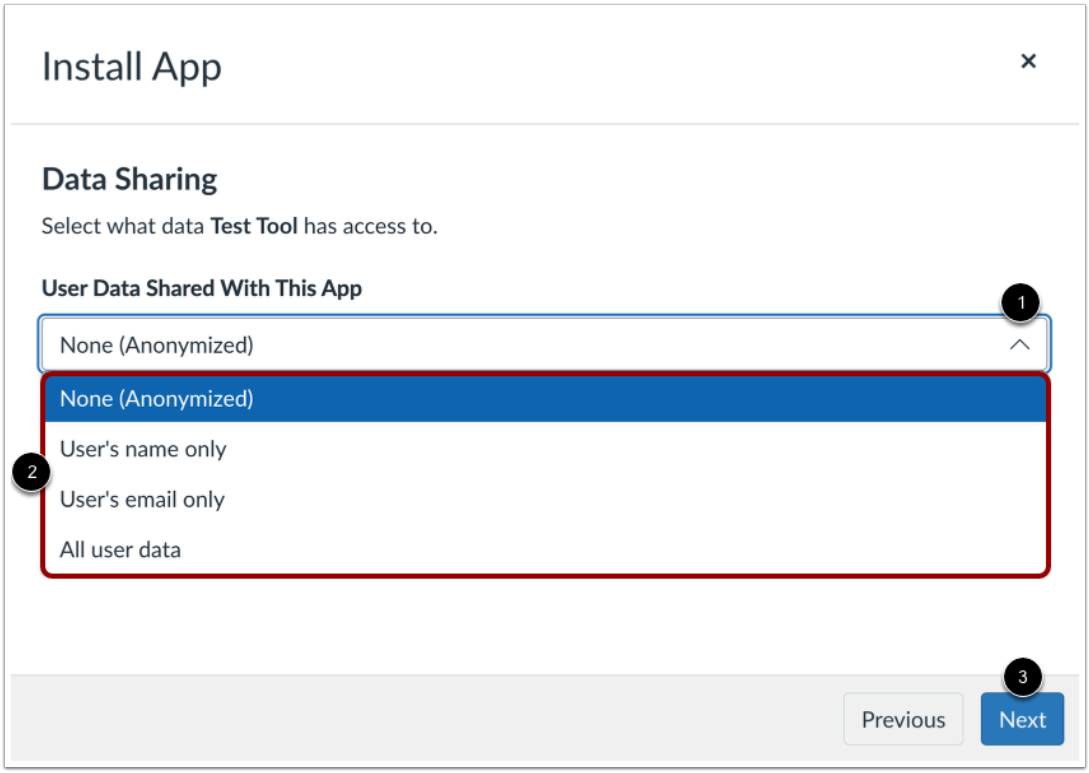


To select which permissions you want to make available to the app, click the **Permission** toggle on [1]. Then, click the **Next** button [2].

Notes:

- For more information about the privacy impacts of these settings, visit the Privacy implications of installing an LTI 1.3 tool in Canvas resource document.
- Changing any of these settings may impact the tool's ability to function in Canvas.

Set User Data-Sharing

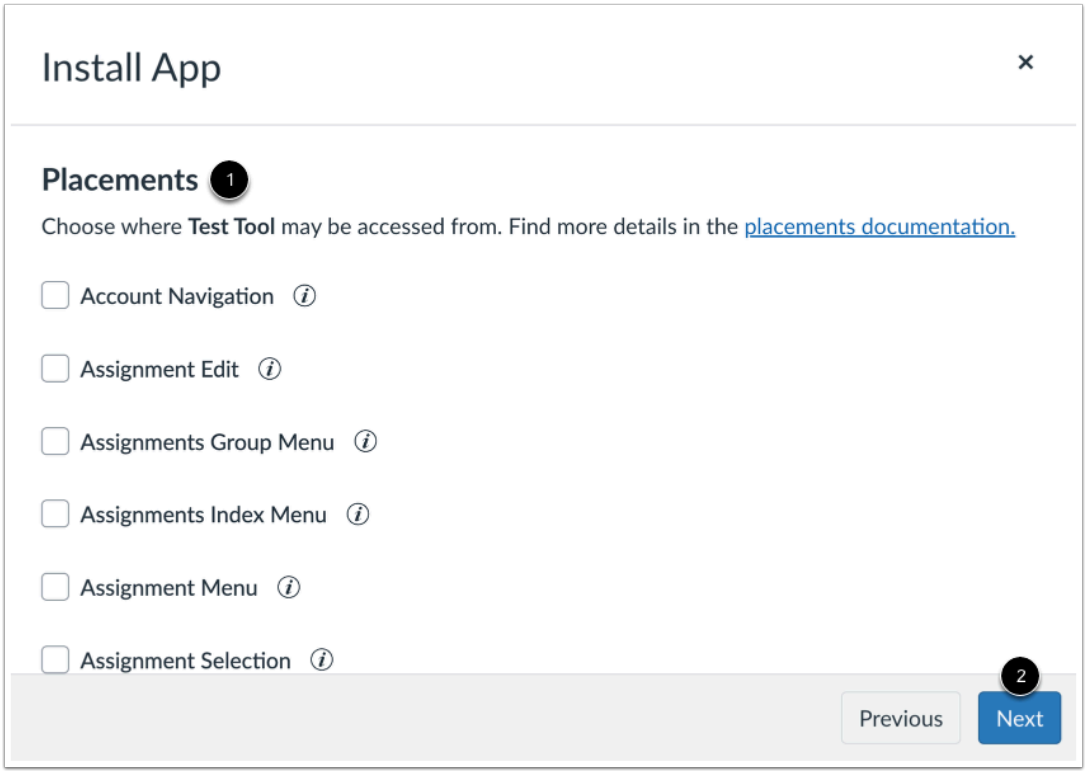


Click the **User Data Shared With This App** drop-down menu [1] and then select what data the tool can access [2]. Options include:

- None (Anonymized)
- User's name only
- User's email only
- All user data

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

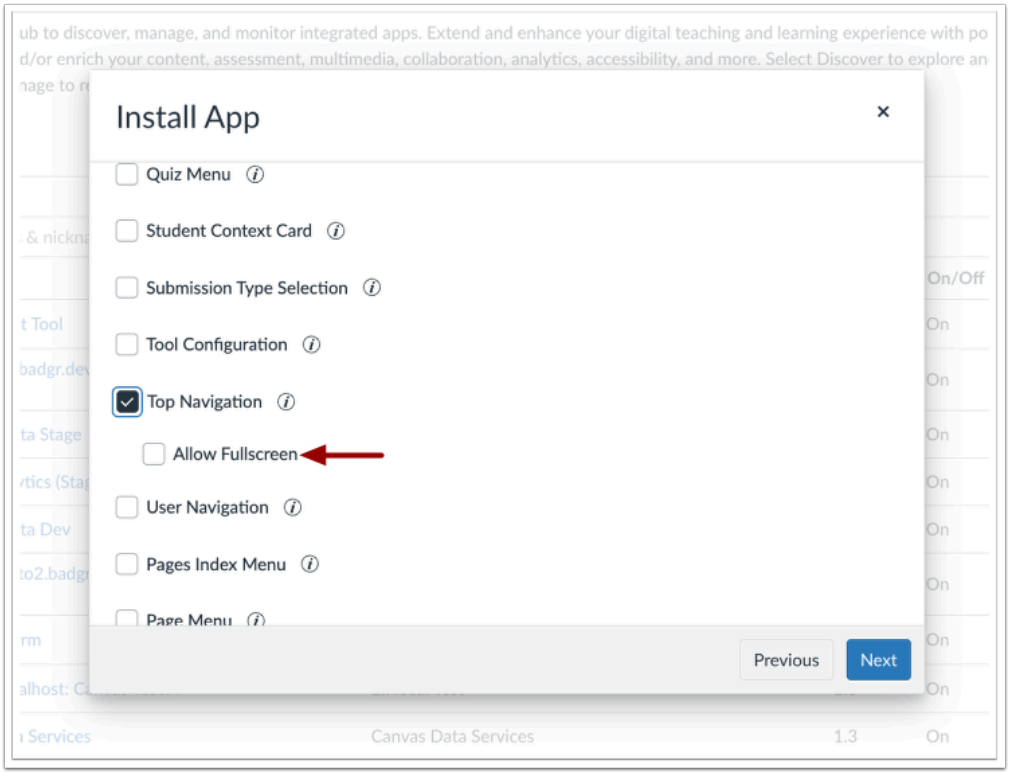
Set Placements



Select where the app can be accessed from [1] and then click the **Next** button [2].

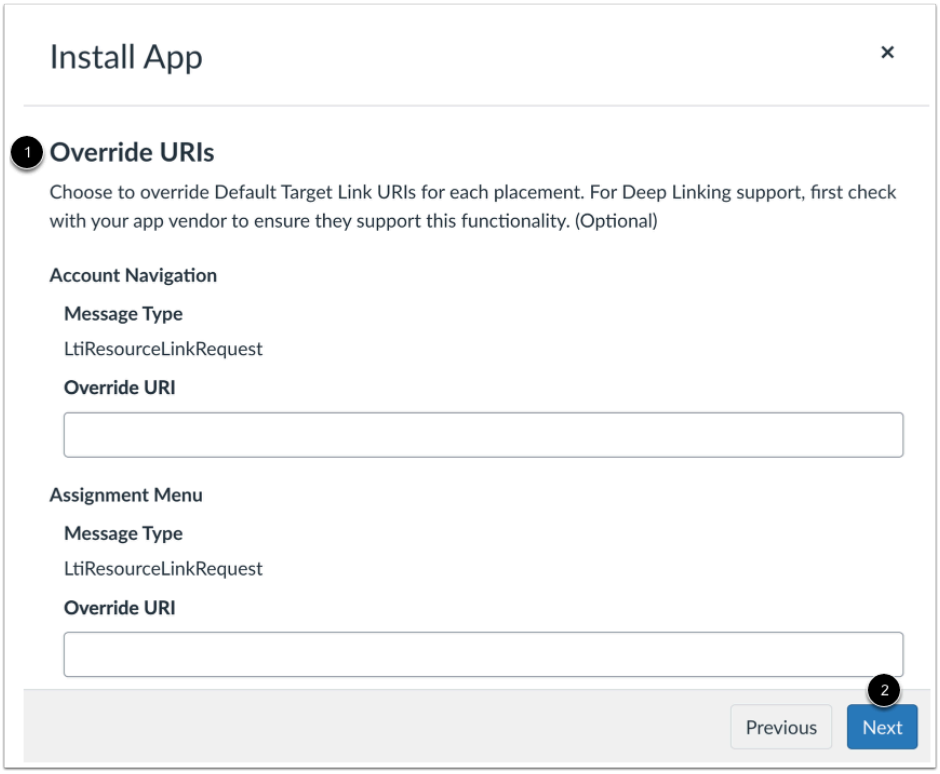
Note: Each placement has an Information icon which shows a screenshot of the location in Canvas as well as a text description of it.

Set Full Screen Option



When adding or editing an LTI tool in Canvas Apps, selecting the Top Navigation checkbox makes the Allow Fullscreen option available.

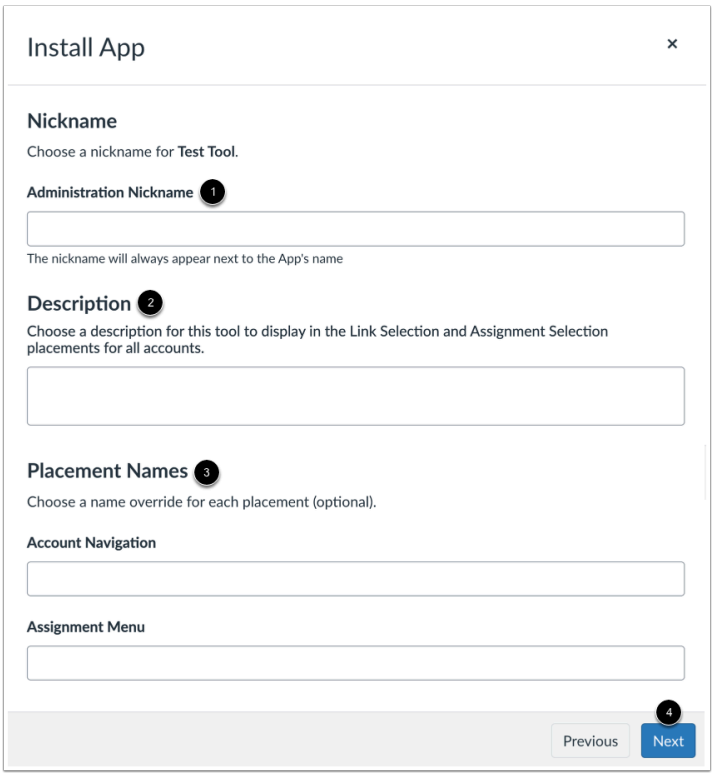
Override URIs



You can choose to override Target Link URIs for the placements you selected [1]. Some tools may be customized to launch to different URIs depending on where in Canvas they are launched from.

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

Add Nickname

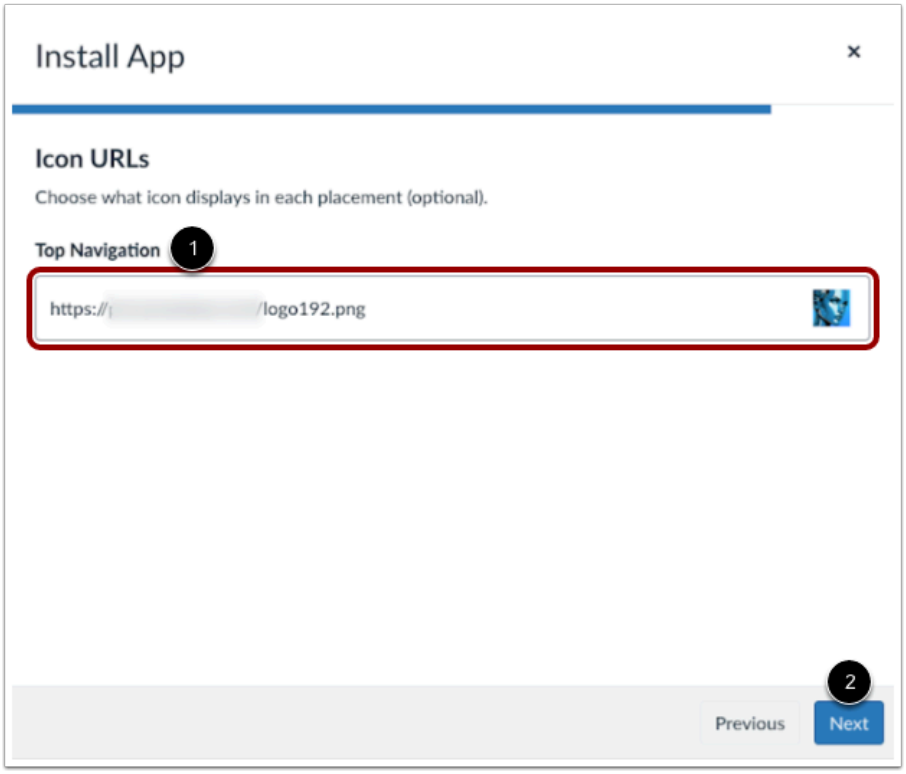


You can add a nickname for the app [1], a short description [2], and a name for each placement [3]. Then, click the **Next** button [4].

Notes:

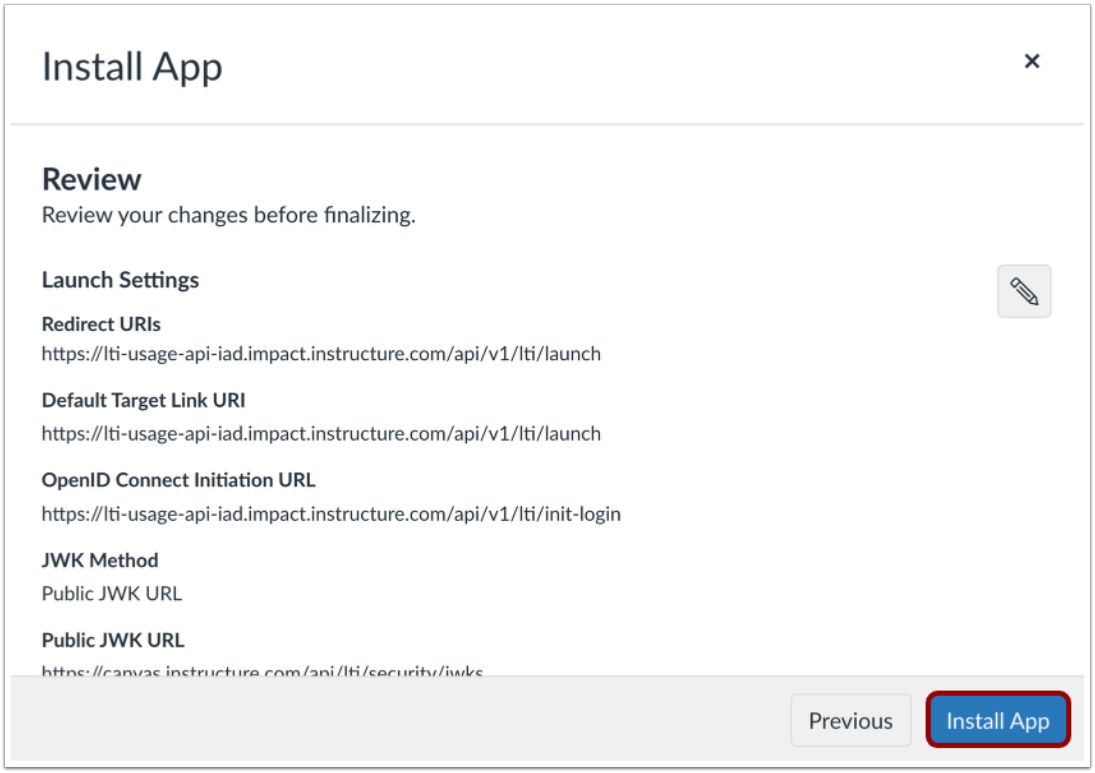
- The Nickname displays in the Manage page. You can use this to indicate any specifics about the tool that helps you identify it such as a campus, sub-account, or other feature.
- The Description field allows you to create a description for users of the tool to see in placements where it is enabled. You may also optionally label the tool differently in certain placements.

Configure Icons



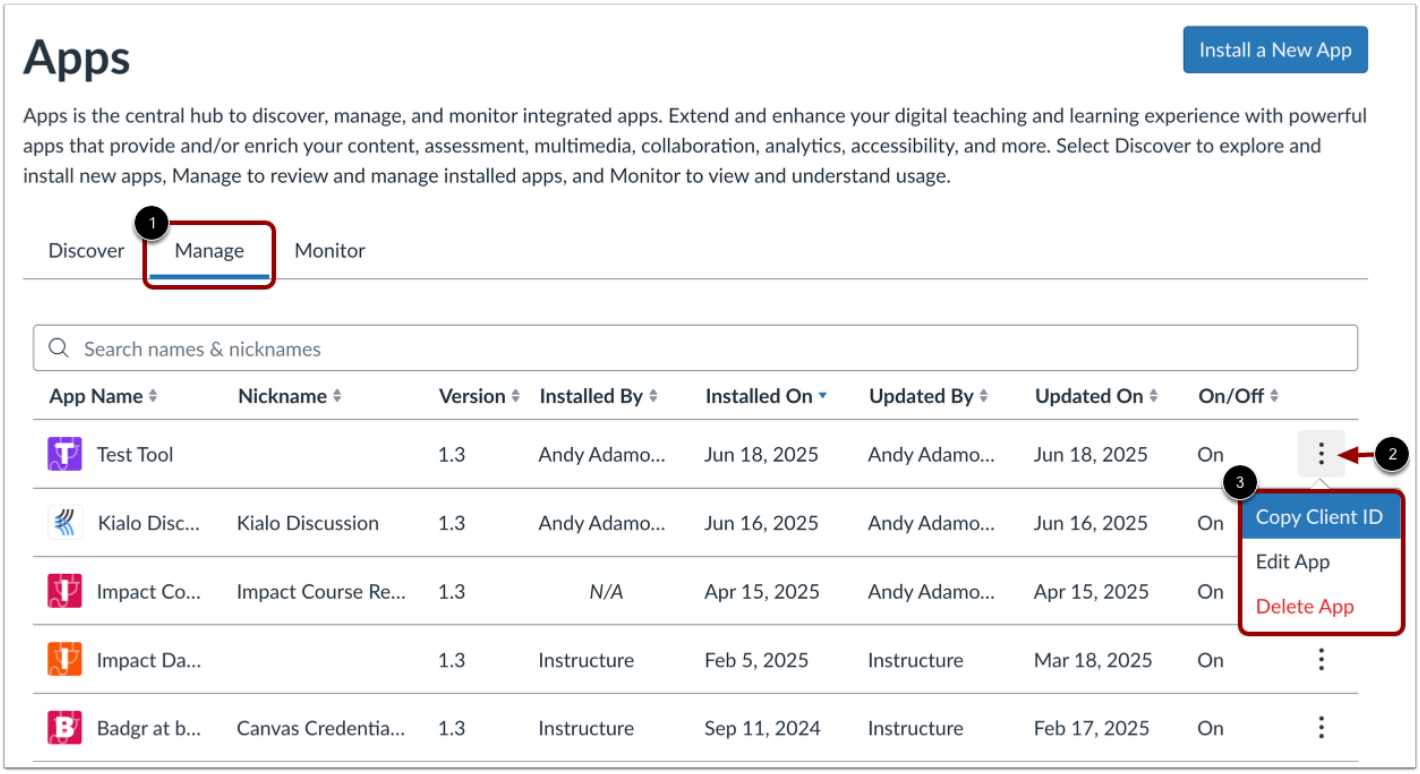
If available, the app's icon URLs display. If the tool has a placement which will display a logo in Canvas, you may add the logo on this screen [1]. Then, click the **Next** button [2].

Review and Install App



Review all the details and then click the **Install App** button.

Manage App



After installation, the app appears in the Manage tab [1]. To manage the app, click the **Options** icon [2]. You can copy the client ID, edit the app, or delete the app [3].

You can also make the app available in the whole account or in specific courses using a client ID.

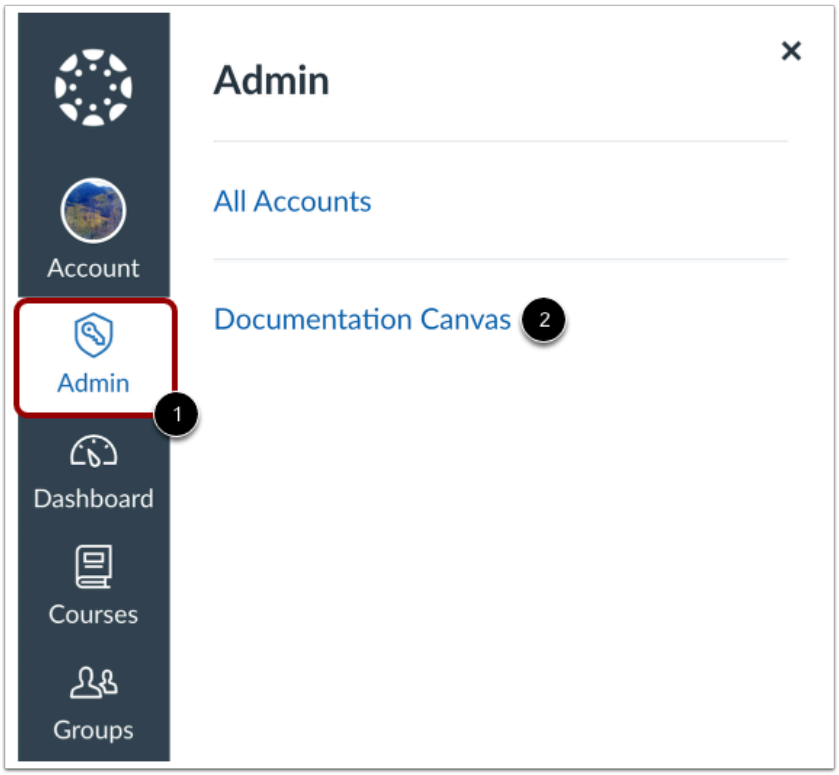
How do I add an app using JSON URL in Canvas Apps?

Canvas Apps is the central hub to discover, manage, and monitor integrated apps. This feature aims to extend and enhance digital teaching and learning experience with powerful apps that provide and/or enrich content, assessment, multimedia, collaboration, analytics, accessibility, and more.

If you are a Canvas root admin with the LTI Registrations - Manage permission, you can add an external app (LTI tool) using JSON URL in the Canvas App page.

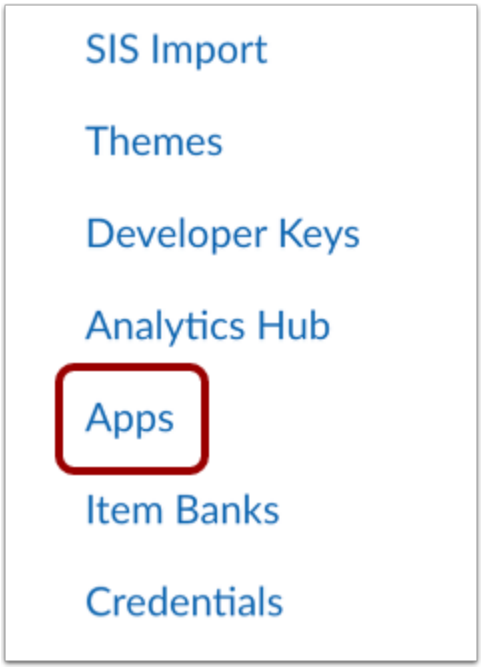
Note: Canvas Apps is available in Account Navigation and enabled for all institutions.

Open Account



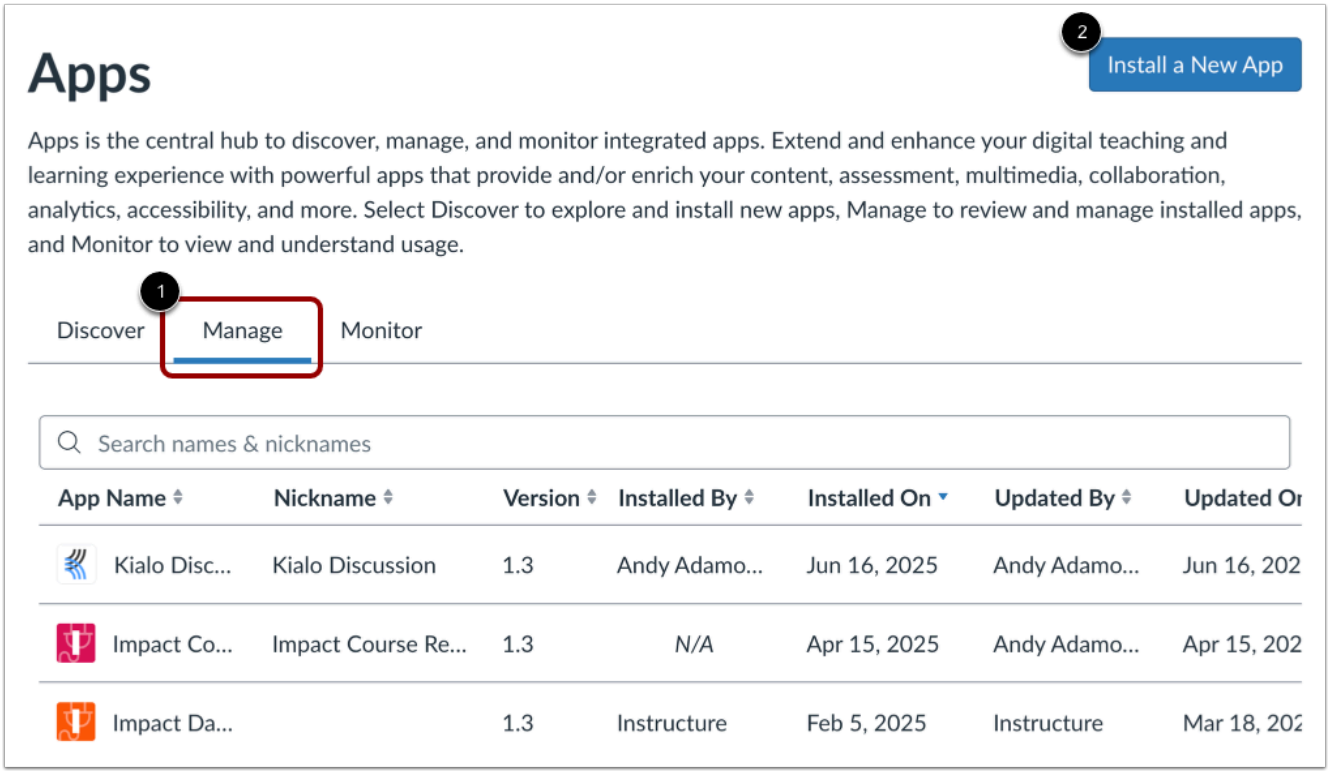
In Global Navigation, click the **Admin** link [1] and then click the name of the account [2].

Open Apps

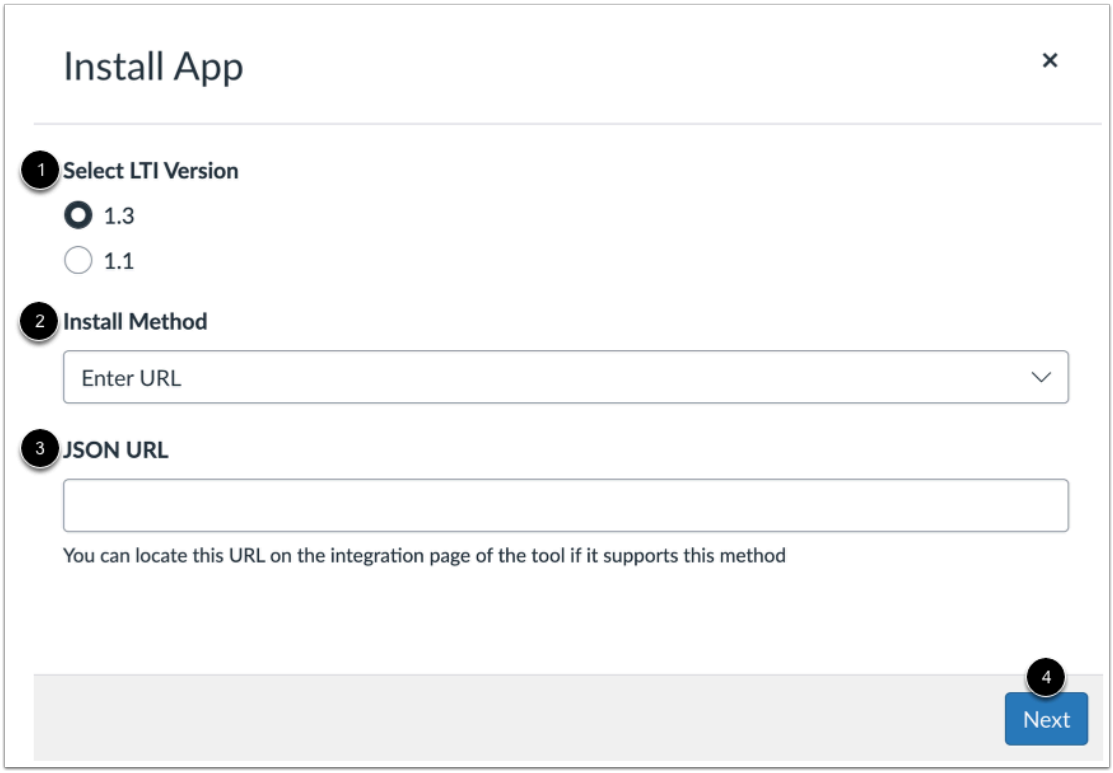


In Account Navigation, click the **Apps** link.

Add New App


Apps
2
Install a New App
Apps is the central hub to discover, manage, and monitor integrated apps. Extend and enhance your digital teaching and learning experience with powerful apps that provide and/or enrich your content, assessment, multimedia, collaboration, analytics, accessibility, and more. Select Discover to explore and install new apps, Manage to review and manage installed apps, and Monitor to view and understand usage.
1
Discover
Manage
Monitor
Search names & nicknames
App Name
Nickname
Version
Installed By
Installed On
Updated By
Updated Or
Kialo Disc...
Kialo Discussion
1.3
Andy Adamo...
Jun 16, 2025
Andy Adamo...
Jun 16, 202
Impact Co...
Impact Course Re...
1.3
N/A
Apr 15, 2025
Andy Adamo...
Apr 15, 202
Impact Da...
1.3
Instructure
Feb 5, 2025
Instructure
Mar 18, 202

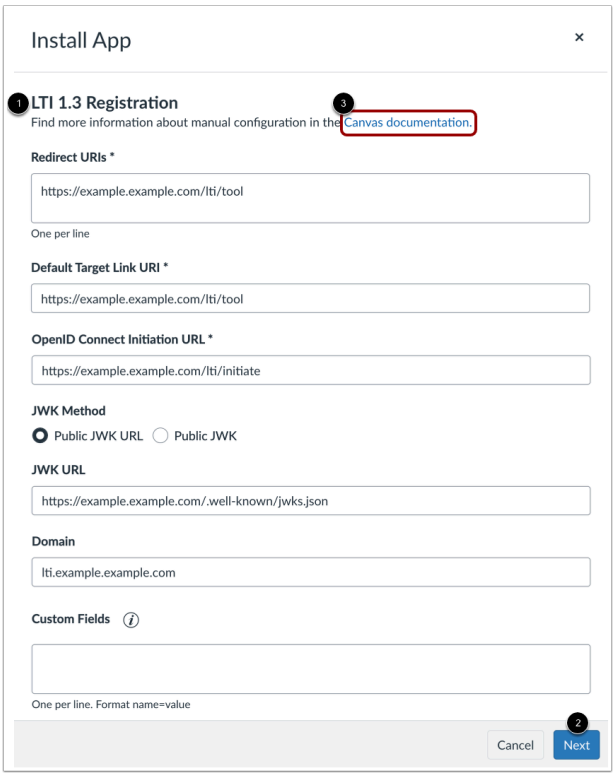
Select Install Method



Select the LTI version number 1.3 [1]. In the **Install Method** drop-down menu, select the **Enter URL** option [2].

In the **JSON URL** field, enter the JSON code given to you by the tool provider [3]. Then, click the **Next** button [4].

Complete LTI 1.3 Registration



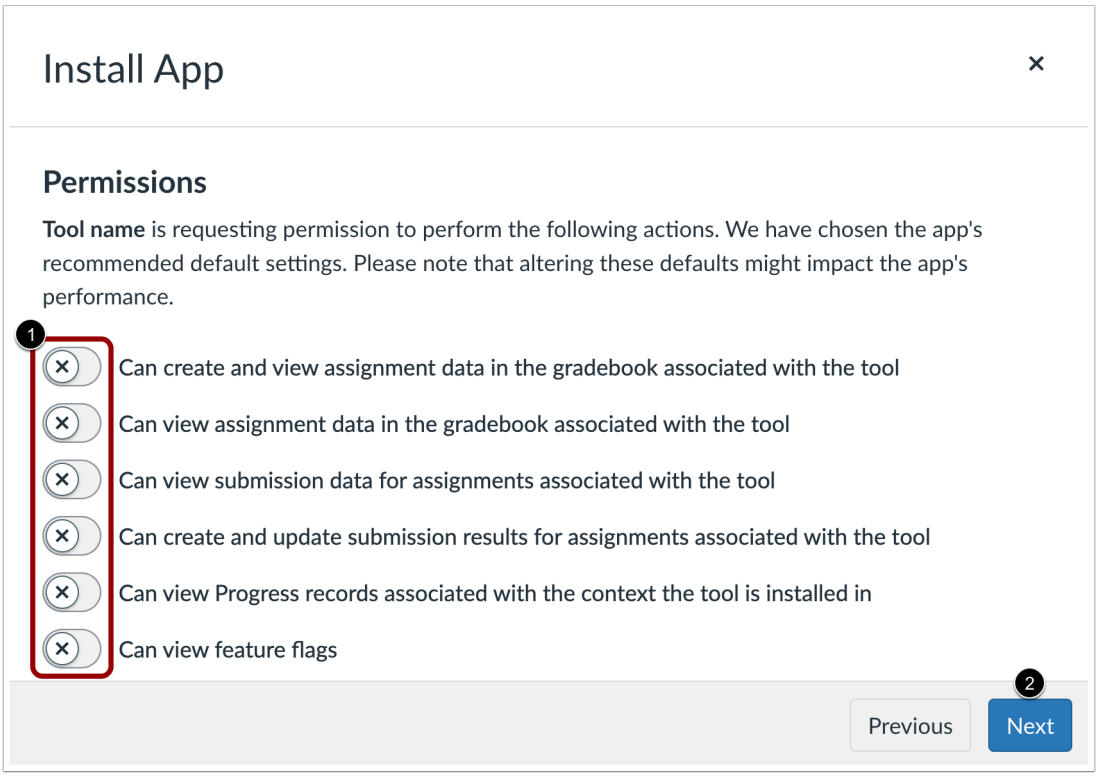
The LTI 1.3 Registration window displays the technical details needed for the configuration including the URIs used to identify resources from the tool, launch the tool, and authenticate the tool [1].

These values automatically populate based on the JSON you pasted on the previous screen. You can make changes if needed, however, this may prevent the tool from working properly.

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

To learn more about manual configuration, click the **Canvas documentation** link [3].

Set Permissions

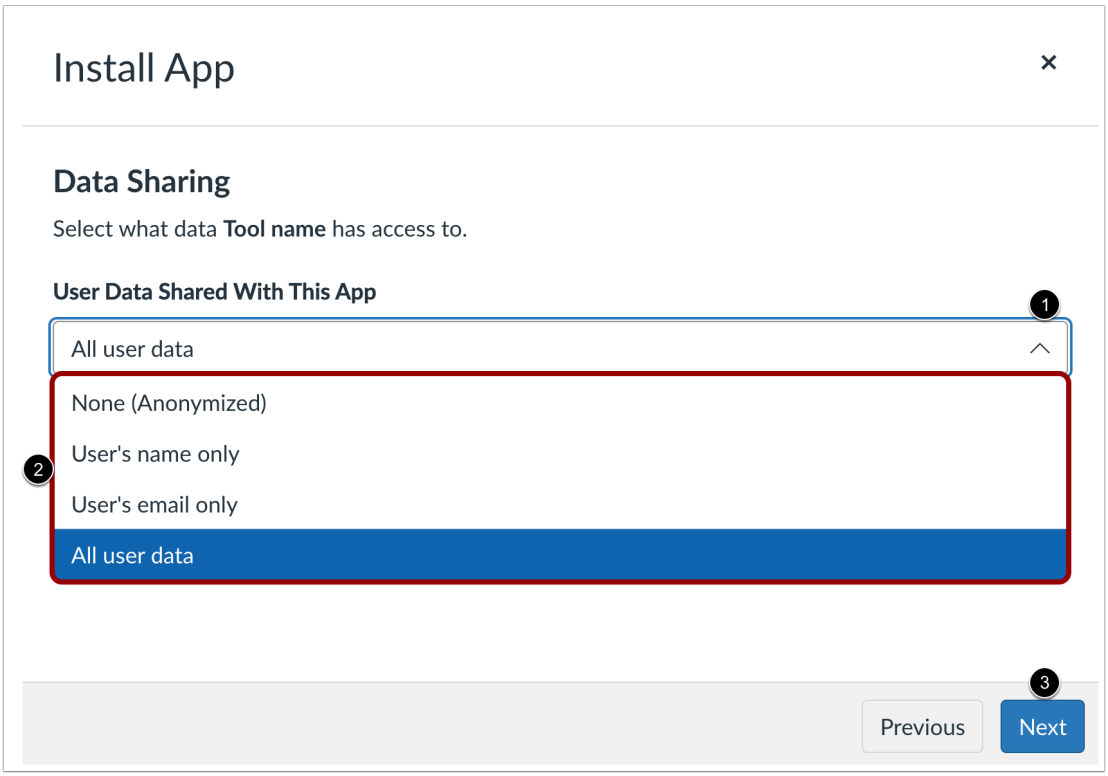


To select which permissions you want to make available to the app, click the **Permission** toggle on [1]. Then, click the **Next** button [2].

Notes:

- For more information about the privacy impacts of these settings, visit the Privacy implications of installing an LTI 1.3 tool in Canvas resource document.
- Changing any of these settings may impact the tool's ability to function in Canvas.

Set User Data-Sharing

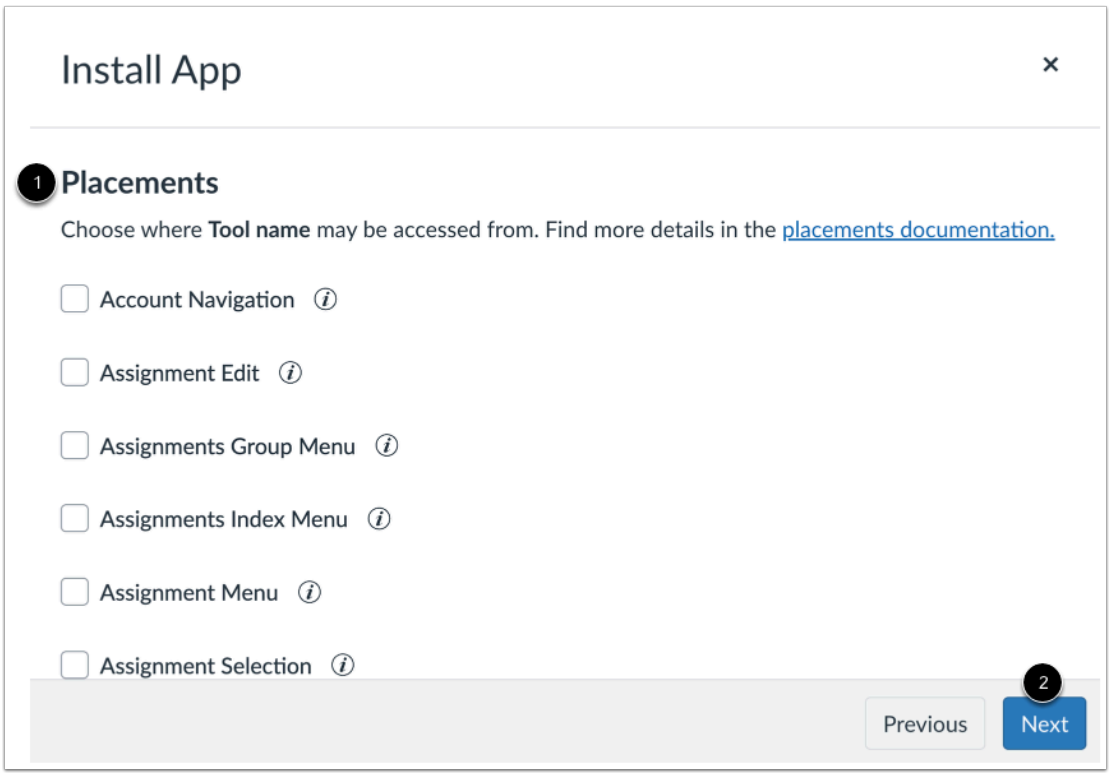


Click the **User Data Shared With This App** drop-down menu [1] and then select what data the tool can access [2]. Options include:

- None (Anonymized)
- User's name only
- User's email only
- All user data

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

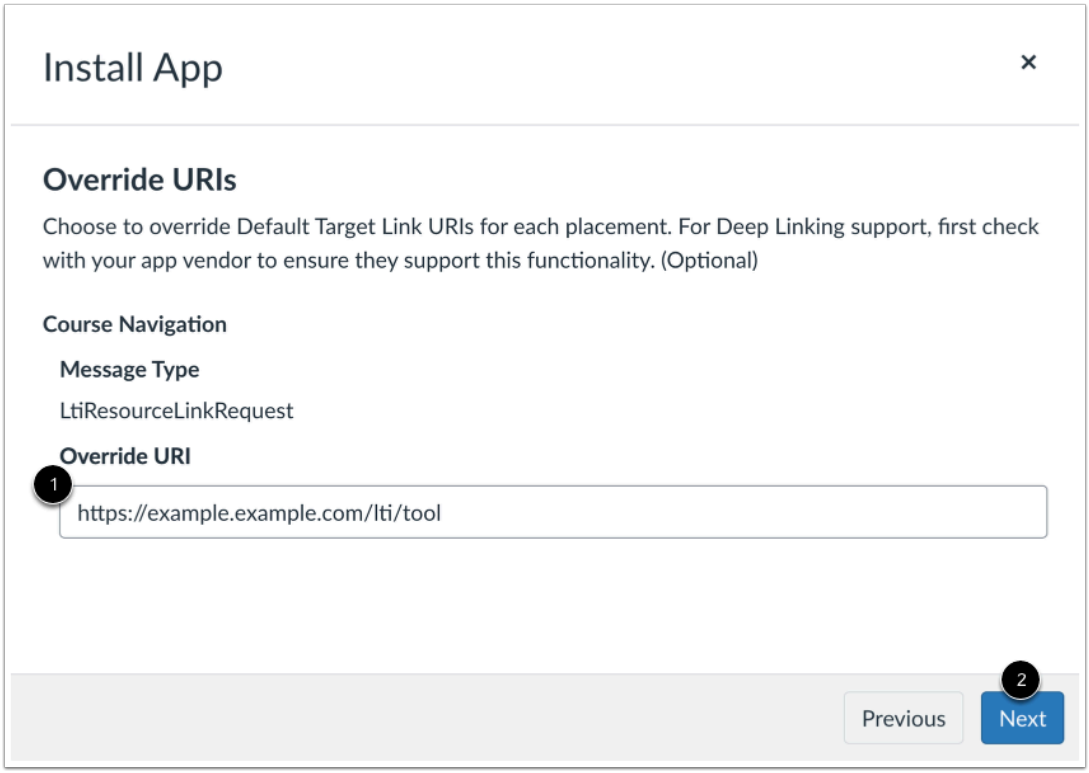
Set Placements



Select where the app can be accessed from [1] and then click the **Next** button [2].

Note: Each placement has an Information icon which shows a screenshot of the location in Canvas as well as a text description of it.

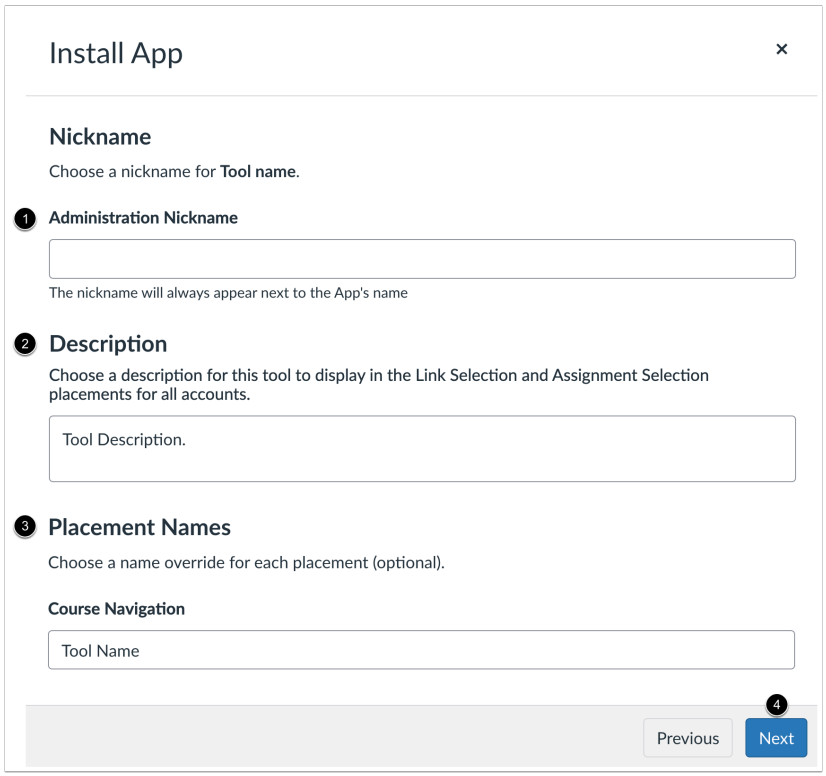
Override URIs



You can choose to override Target Link URIs for the placements you selected [1]. Some tools may be customized to launch to different URIs depending on where in Canvas they are launched from.

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

Add Nickname

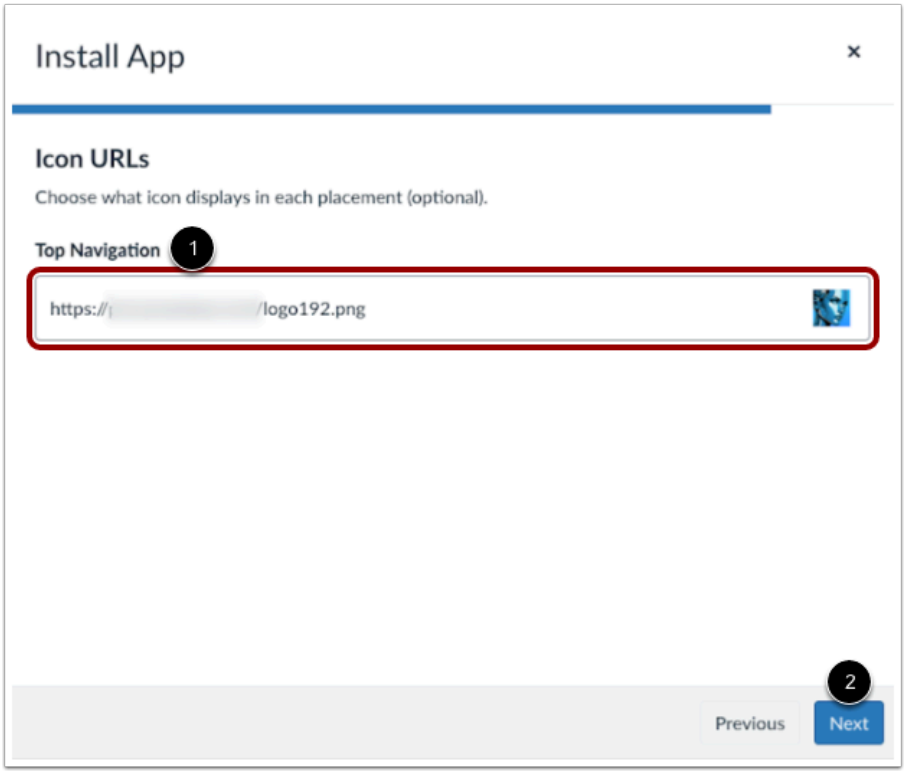


You can add a nickname for the app [1], a short description [2], and a name for each placement [3]. Then, click the **Next** button [4].

Notes:

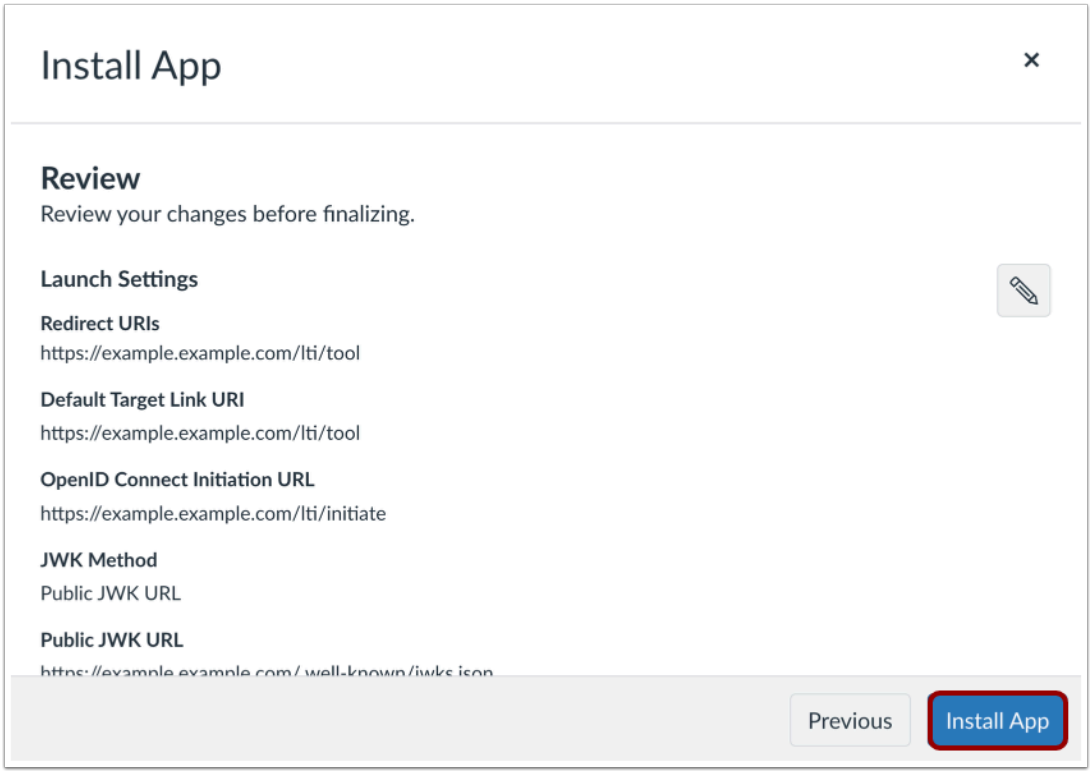
- The Nickname displays in the Manage page. You can use this to indicate any specifics about the tool that helps you identify it such as a campus, sub-account, or other feature.
- The Description field allows you to create a description for users of the tool to see in placements where it is enabled. You may also optionally label the tool differently in certain placements.

Configure Icons



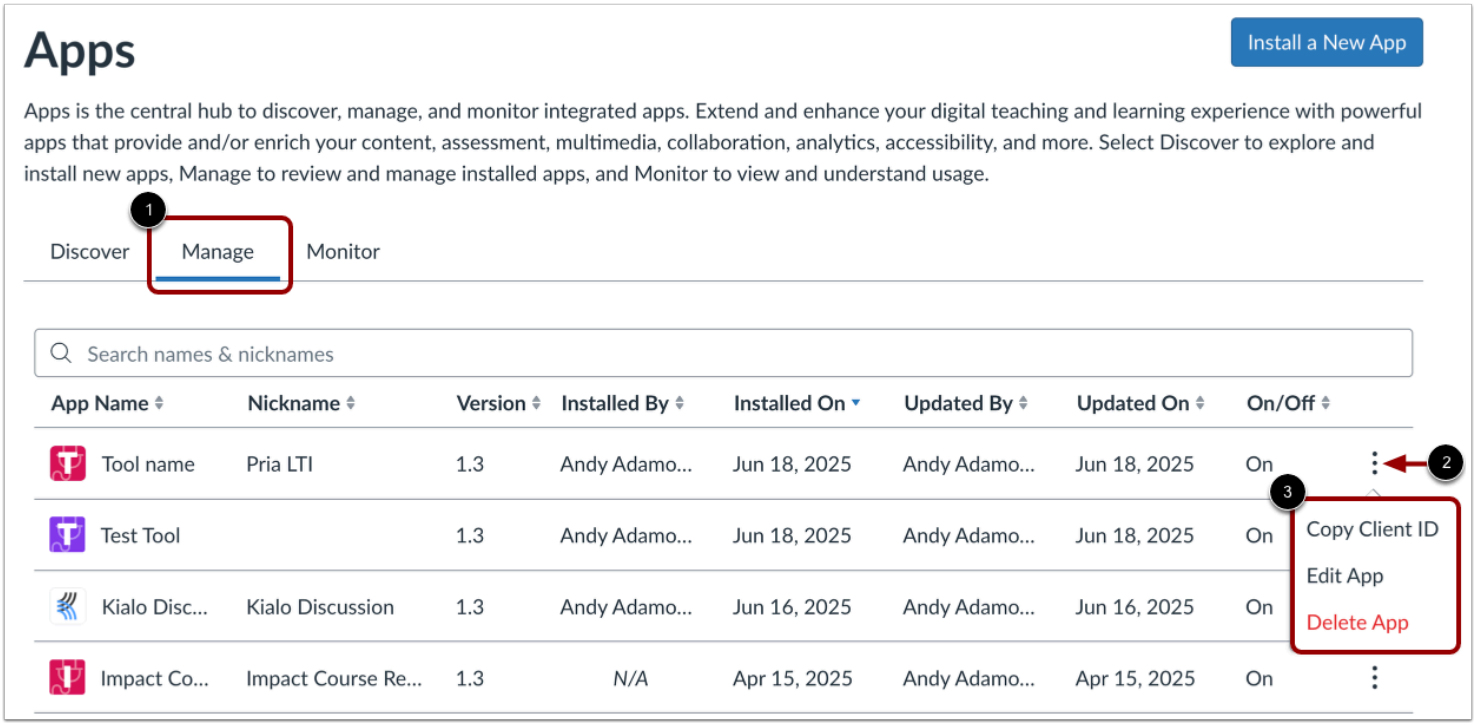
If available, the app's icon URLs display. If the tool has a placement which will display a logo in Canvas, you may add the logo on this screen [1]. Then, click the **Next** button [2].

Review and Install App



Review all the details and then click the **Install App** button.

Manage App



After installation, the app appears in the Manage tab [1]. To manage the app, click the **Options** icon [2]. You can copy the client ID, edit the app, or delete the app [3].

You can also make the app available in the whole account or in specific courses using a client ID.

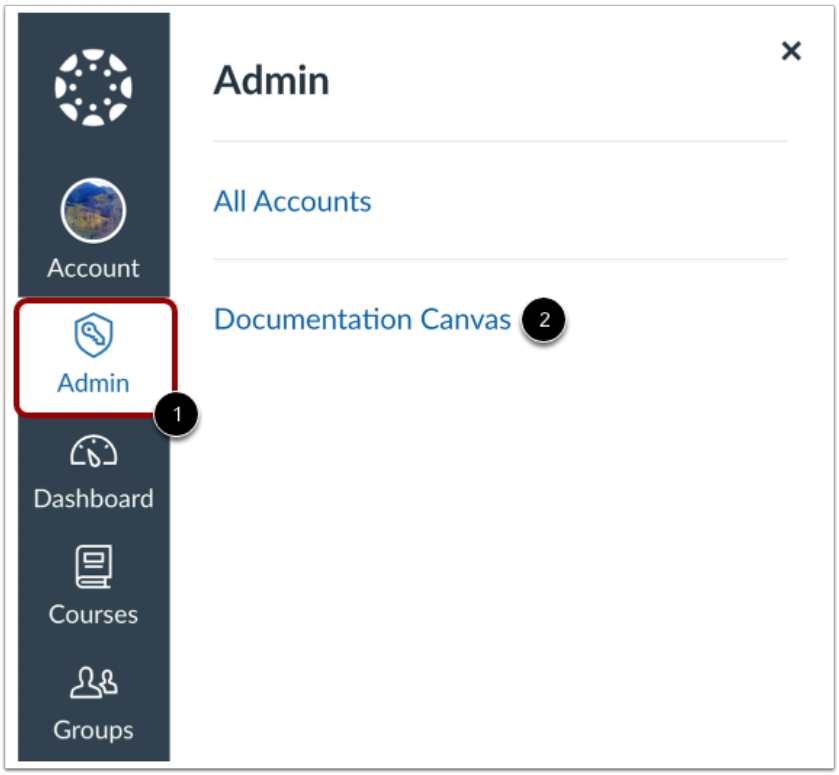
How do I add an app using Dynamic Registration in Canvas Apps?

Canvas Apps is the central hub to discover, manage, and monitor integrated apps. This feature aims to extend and enhance digital teaching and learning experience with powerful apps that provide and/or enrich content, assessment, multimedia, collaboration, analytics, accessibility, and more.

If you are a Canvas root admin with the LTI Registrations - Manage permission, you can add an external app (LTI tool) using Dynamic Registration in the Canvas App page.

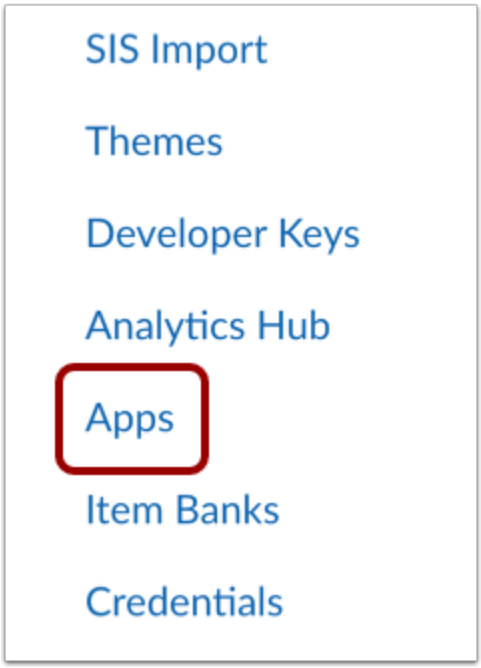
Note: Canvas Apps is available in Account Navigation and enabled for all institutions.

Open Account



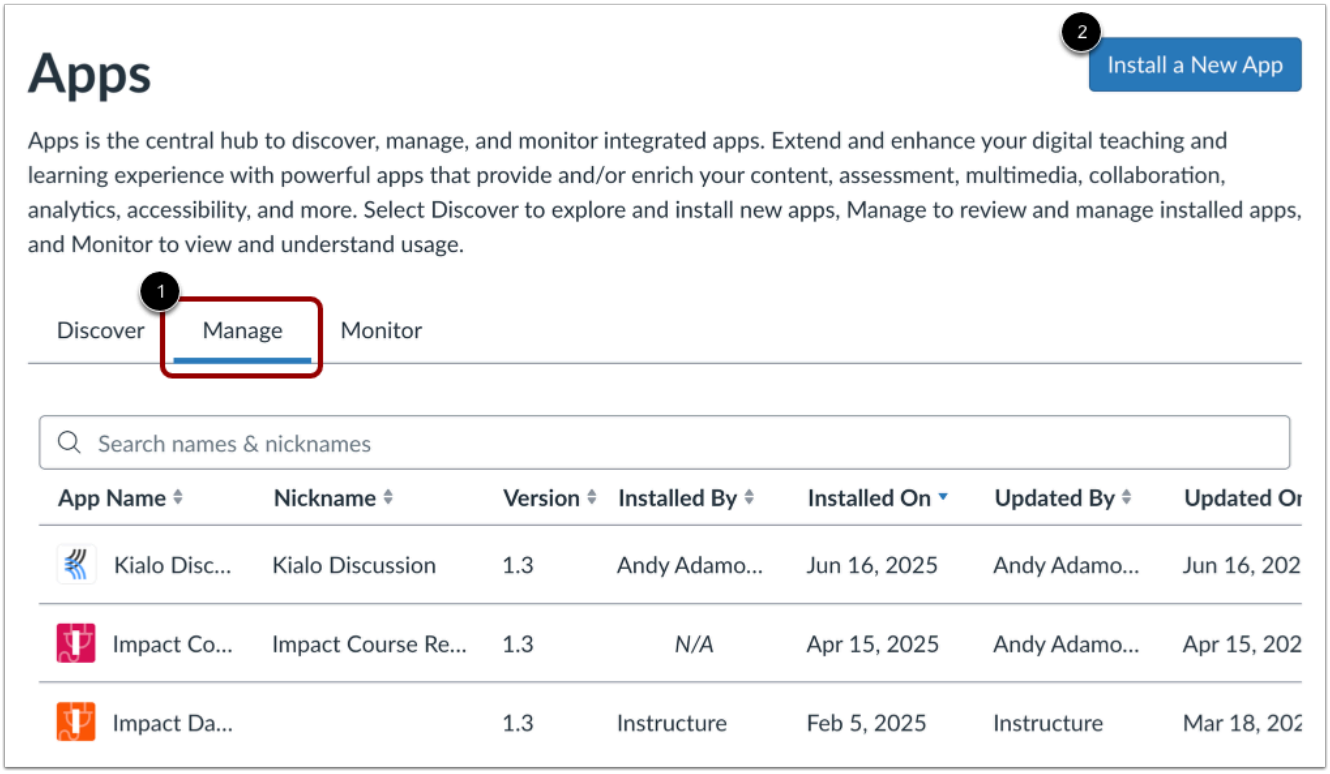
In Global Navigation, click the **Admin** link [1] and then click the name of the account [2].

Open Apps



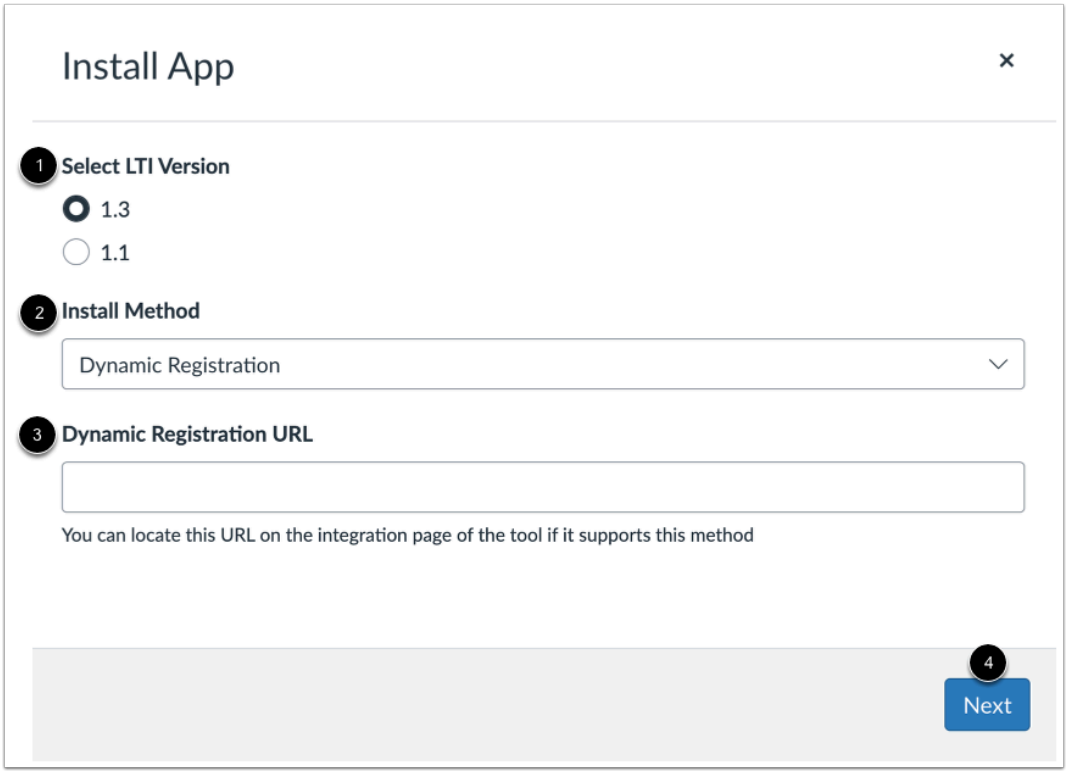
In Account Navigation, click the **Apps** link.

Add New App



In the **Manage** tab [1], click the **Install a New App** button [2].

Select Install Method

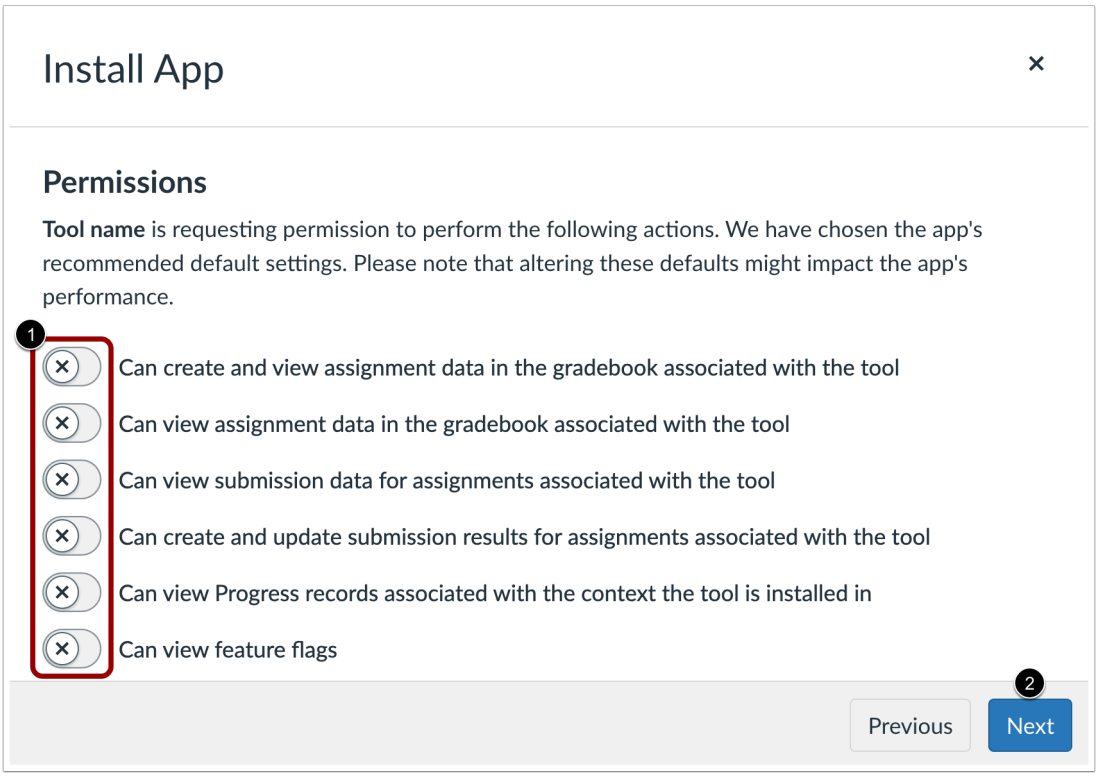


Select the LTI version number 1.3 [1]. In the **Install Method** drop-down menu, select the **Dynamic Registration** option [2].

Enter **Dynamic Registration URL** given to you by the tool provider [3]. Then, click the **Next** button [4].

Note: The Dynamic Registration URL is typically not the URL used to access the tool in a web browser. It should be a distinct URL programmed to give Canvas the configuration information. You can review all settings the tool requests before the configuration is created. These can also be changed at any time in the future.

Set Permissions

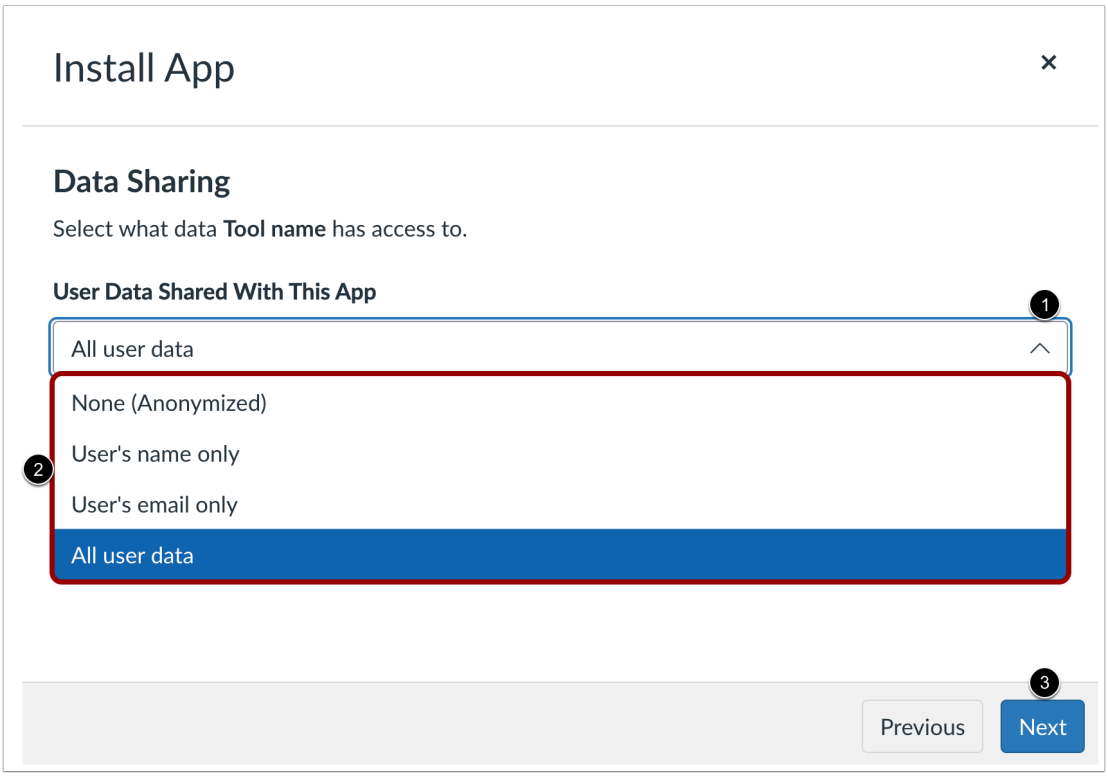


To select which permissions you want to make available to the app, click the **Permission** toggle on [1]. Then, click the **Next** button [2].

Notes:

- For more information about the privacy impacts of these settings, visit the Privacy implications of installing an LTI 1.3 tool in Canvas resource document.
- Changing any of these settings may impact the tools ability to function in Canvas.

Set User Data-Sharing

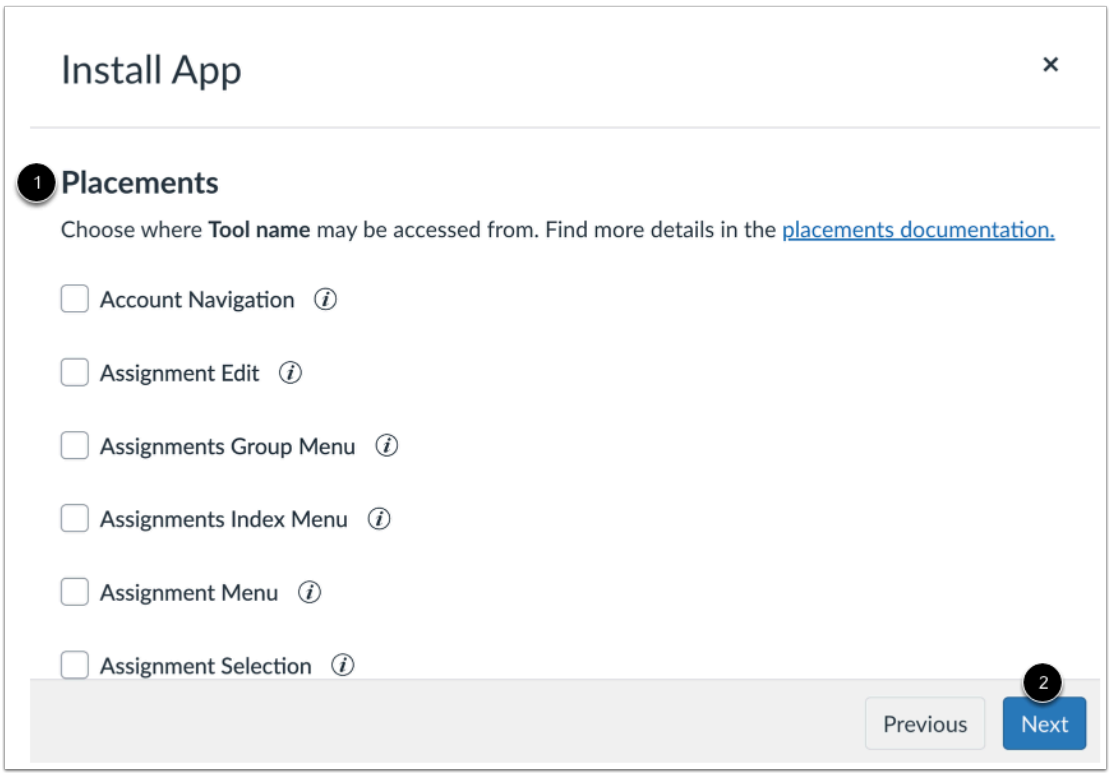


Click the **User Data Shared With This App** drop-down menu [1] and then select what data the tool can access [2]. Options include:

- None (Anonymized)
- User's name only
- User's email only
- All user data

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

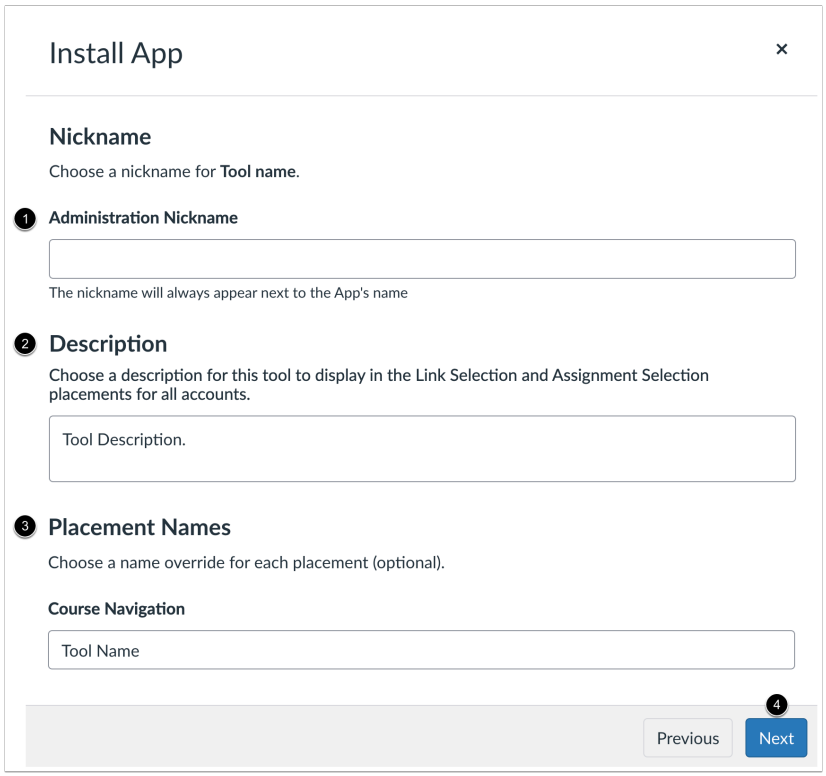
Set Placements



Select where the app can be accessed from [1] and then click the **Next** button [2].

Note: Each placement has an Information icon which shows a screenshot of the location in Canvas as well as a text description of it.

Add Nickname

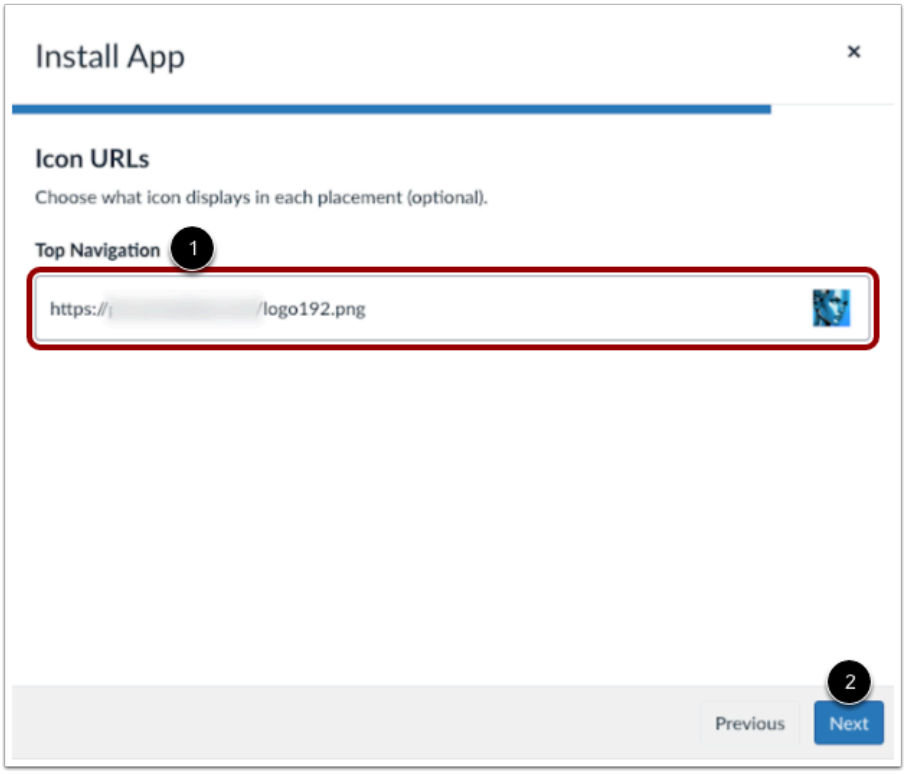


You can add a nickname for the app [1], a short description [2], and a name for each placement [3]. Then, click the **Next** button [4].

Notes:

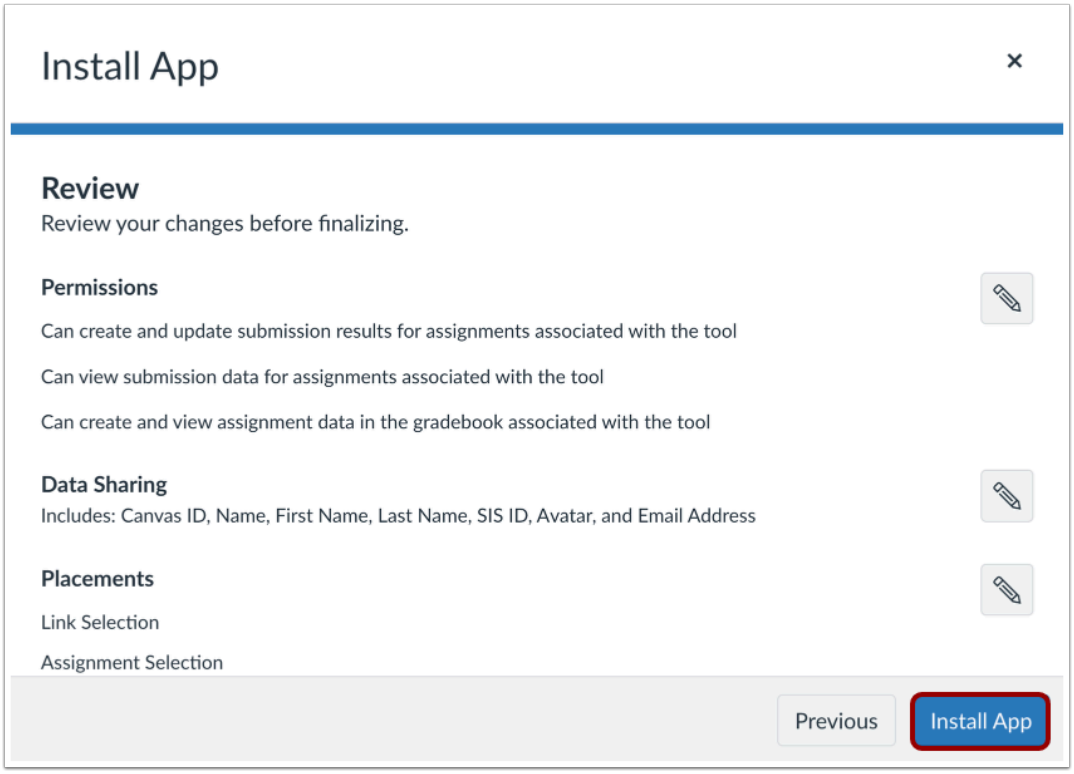
- The Nickname displays in the Manage page. You can use this to indicate any specifics about the tool that helps you identify it such as a campus, sub-account, or other feature.
- The Description field allows you to create a description for users of the tool to see in placements where it is enabled. You may also optionally label the tool differently in certain placements.

Configure Icons



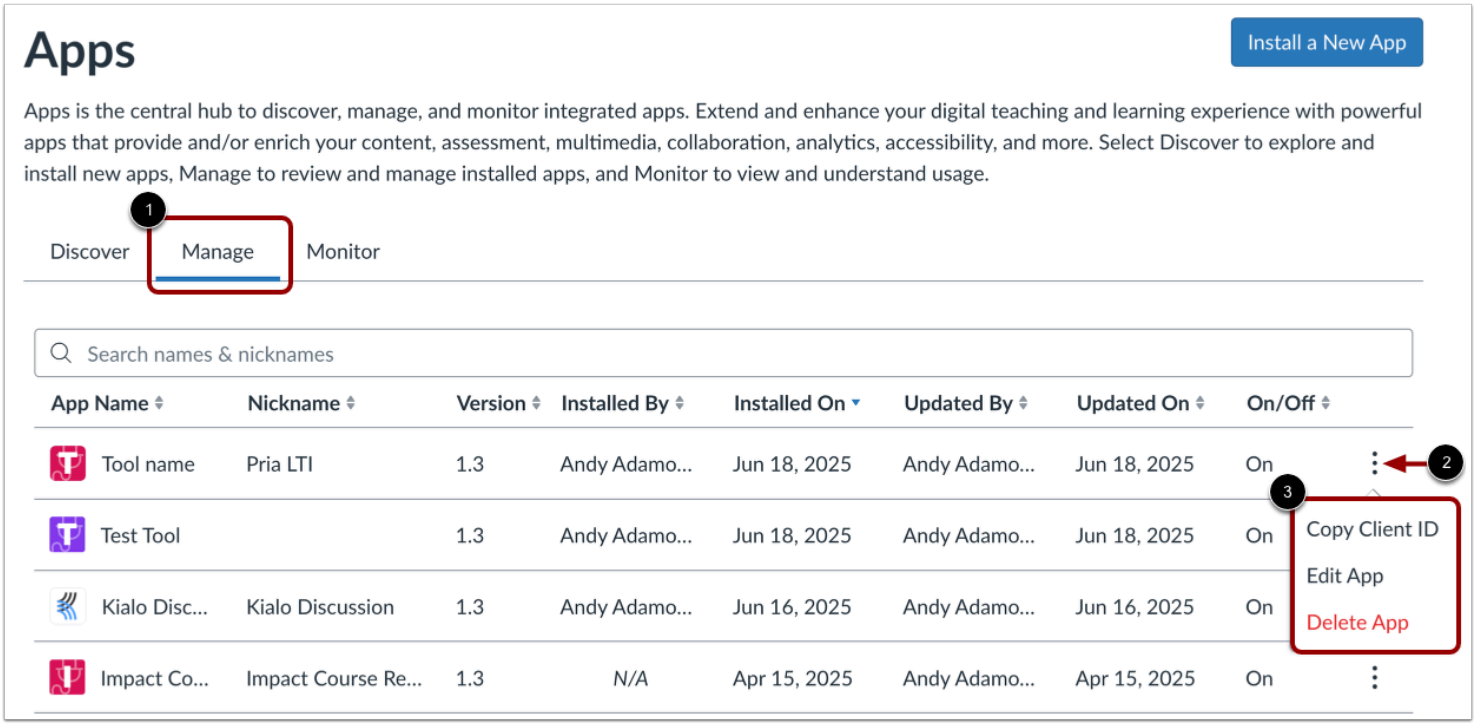
If available, the app's icon URLs display. If the tool has a placement which will display a logo in Canvas, you may add the logo on this screen [1]. Then, click the **Next** button [2].

Review and Install App



Review all the details and then click the **Install App** button.

Manage App



After installation, the app appears in the Manage tab [1]. To manage the app, click the **Options** icon [2]. You can copy the client ID, edit the app, or delete the app [3].

You can also make the app available in the whole account or in specific courses using a client ID.

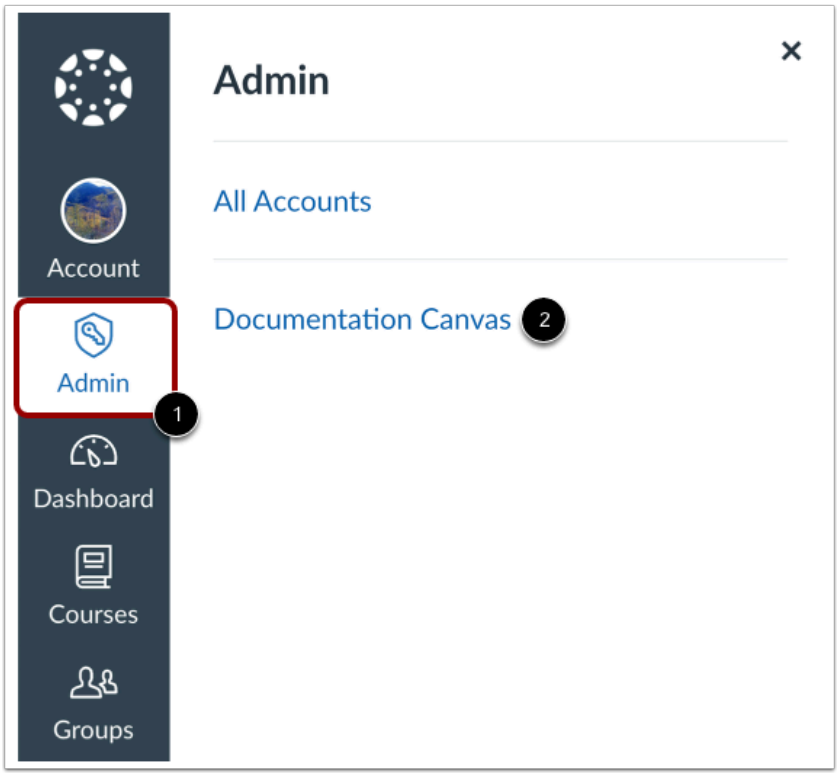
How do I add an app using JSON in Canvas Apps?

Canvas Apps is the central hub to discover, manage, and monitor integrated apps. This feature aims to extend and enhance digital teaching and learning experience with powerful apps that provide and/or enrich content, assessment, multimedia, collaboration, analytics, accessibility, and more.

If you are a Canvas root admin with the LTI Registrations - Manage permission, you can add an external app (LTI tool) using JSON in the Canvas App page.

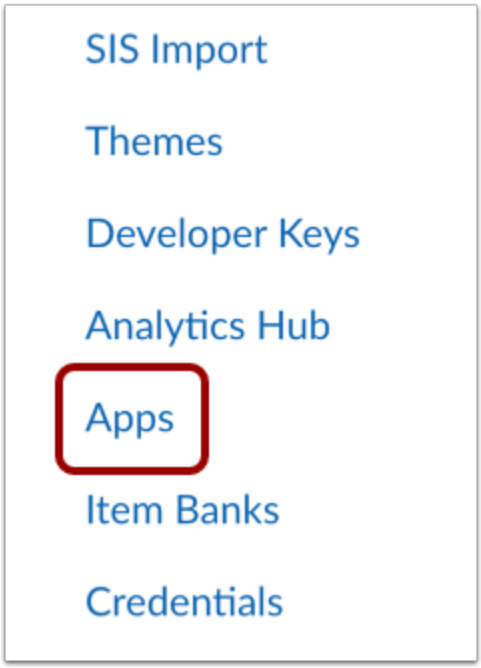
Note: Canvas Apps is available in Account Navigation and enabled for all institutions.

Open Account



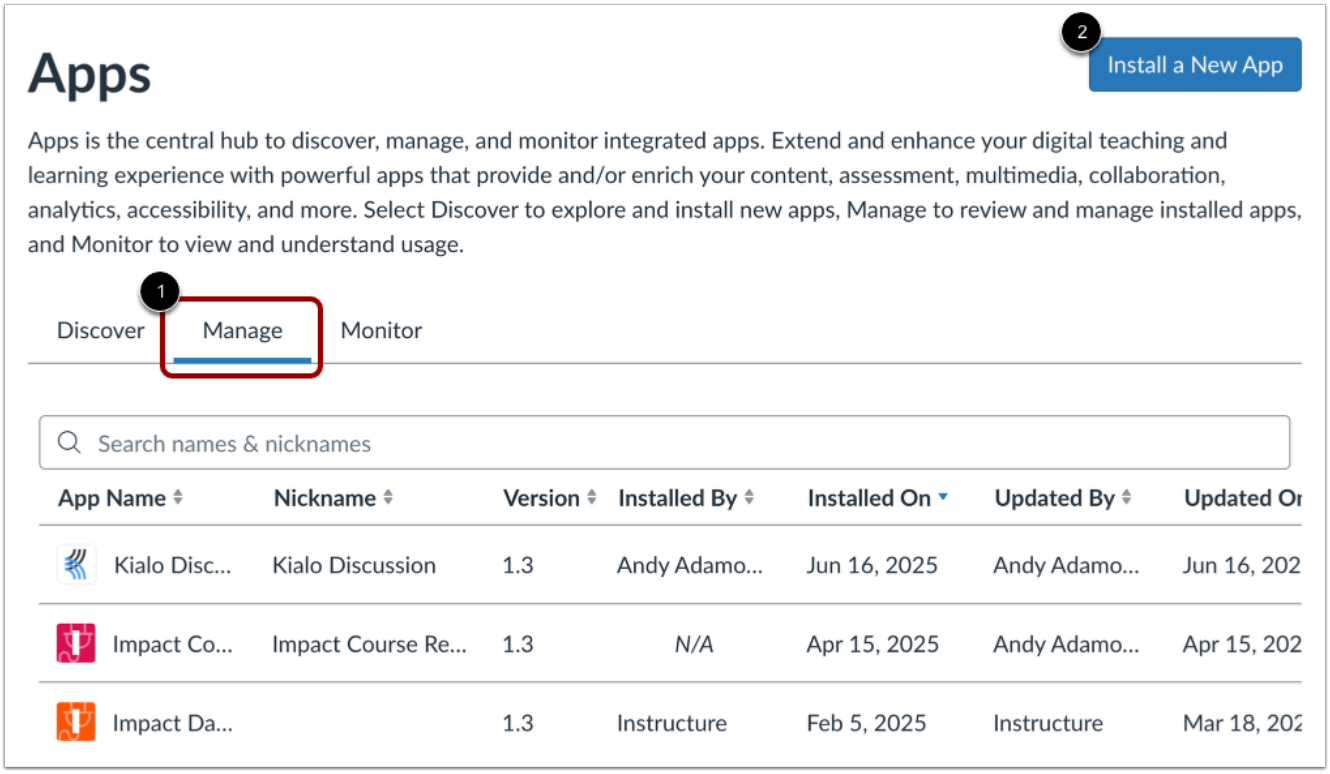
In Global Navigation, click the **Admin** link [1] and then click the name of the account [2].

Open Apps



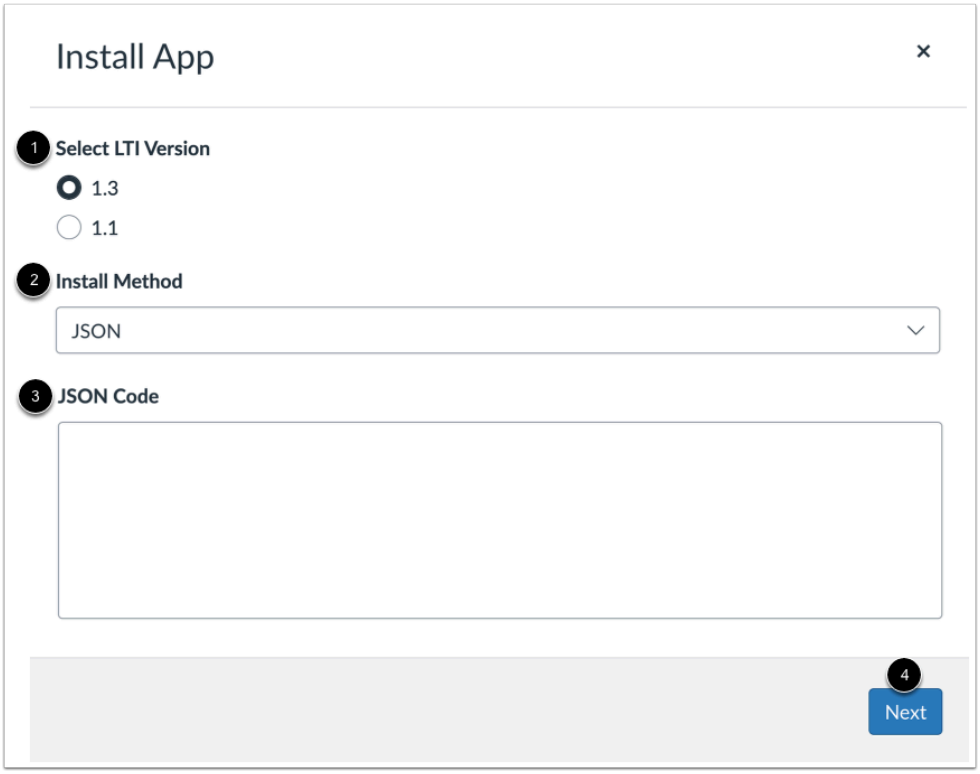
In Account Navigation, click the **Apps** link.

Add New App



In the **Manage** tab [1], click the **Install a New App** button [2].

Select Install Method



Select the LTI version number 1.3 [1]. In the **Install Method** drop-down menu, select the **JSON** option [2].

In the **JSON Code** field, enter the JSON code given to you by the tool provider [3]. Then, click the **Next** button [4].

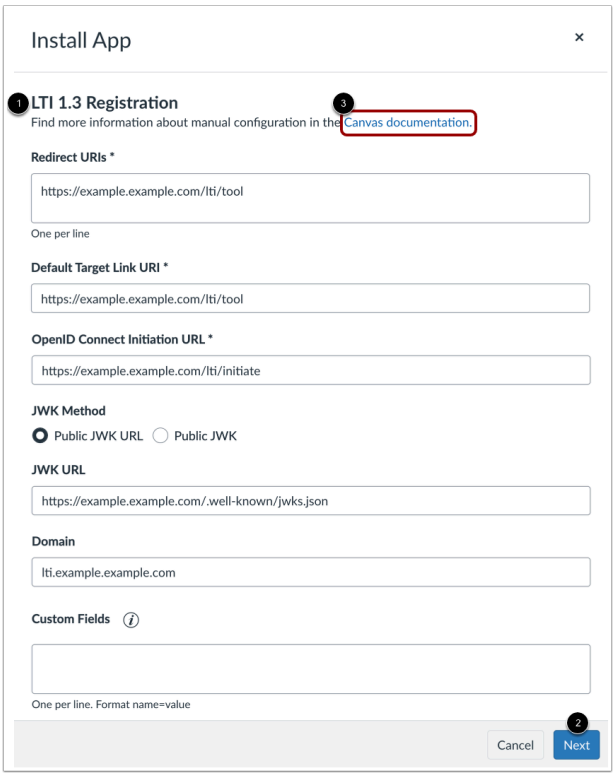
Note: The JSON code is usually in the format as below.

```
{
  "title": "Tool name",
  "description": "Tool Description.",
  "target_link_uri": "https://example.example.com/lti/tool",
  "oidc_initiation_url": "https://example.example.com/lti/initiate",
  "oidc_initiation_urls": {},
  "public_jwk_url": "https://example.example.com/.well-known/jwks.json",
  "public_jwk": {},
```

```
  "custom_fields": {},
  "scopes": [
    "https://purl.imsglobal.org/spec/lti-nrps/scope/contextmembership.readonly"
  ],
  "extensions": [
    {
      "domain": "lti.example.example.com",
      "tool_id": null,
      "privacy_level": "public",
      "platform": "canvas.instructure.com",
      "settings": {
        "icon_url": "https://www.example.com/images/1234.png",
        "platform": "canvas.instructure.com",
        "placements": [
          {
            "text": "Tool Name",
            "icon_url": "https://www.example.com/images/1234.png",
            "placement": "course_navigation",
            "message_type": "LtiResourceLinkRequest",
            "target_link_uri": "https://example.example.com/lti/tool"
          }
        ]
      }
    }
  ]
}
```

Click to copy

Complete LTI 1.3 Registration



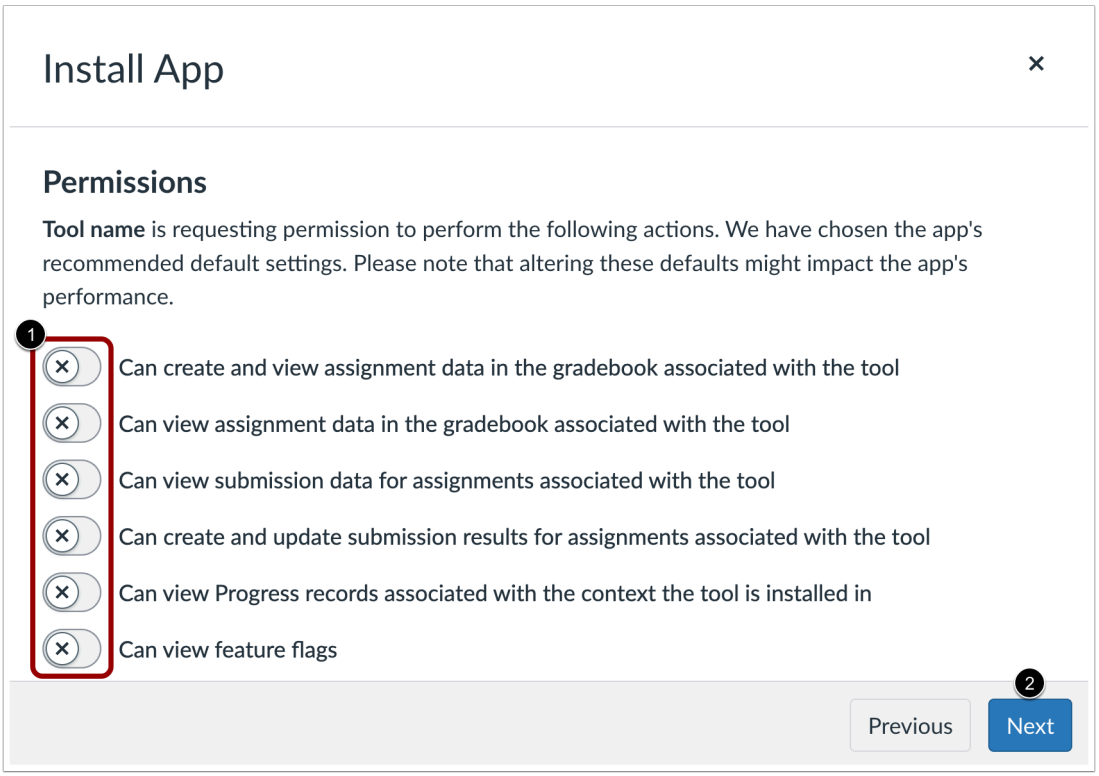
The LTI 1.3 Registration window displays the technical details needed for the configuration including the URIs used to identify resources from the tool, launch the tool, and authenticate the tool [1].

These values automatically populate based on the JSON you pasted on the previous screen. You can make changes if needed, however, this may prevent the tool from working properly.

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

To learn more about manual configuration, click the **Canvas documentation** link [3].

Set Permissions

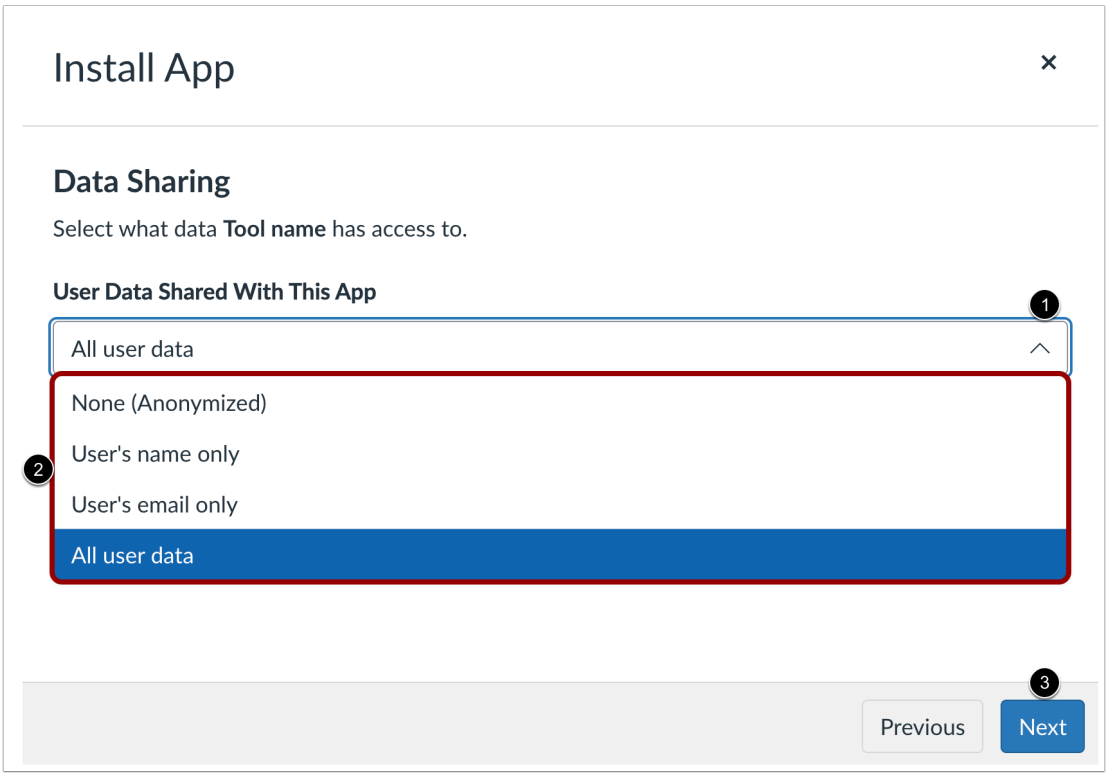


To select which permissions you want to make available to the app, click the **Permission** toggle on [1]. Then, click the **Next** button [2].

Notes:

- For more information about the privacy impacts of these settings, visit the Privacy implications of installing an LTI 1.3 tool in Canvas resource document.
- Changing any of these settings may impact the tool's ability to function in Canvas.

Set User Data-Sharing

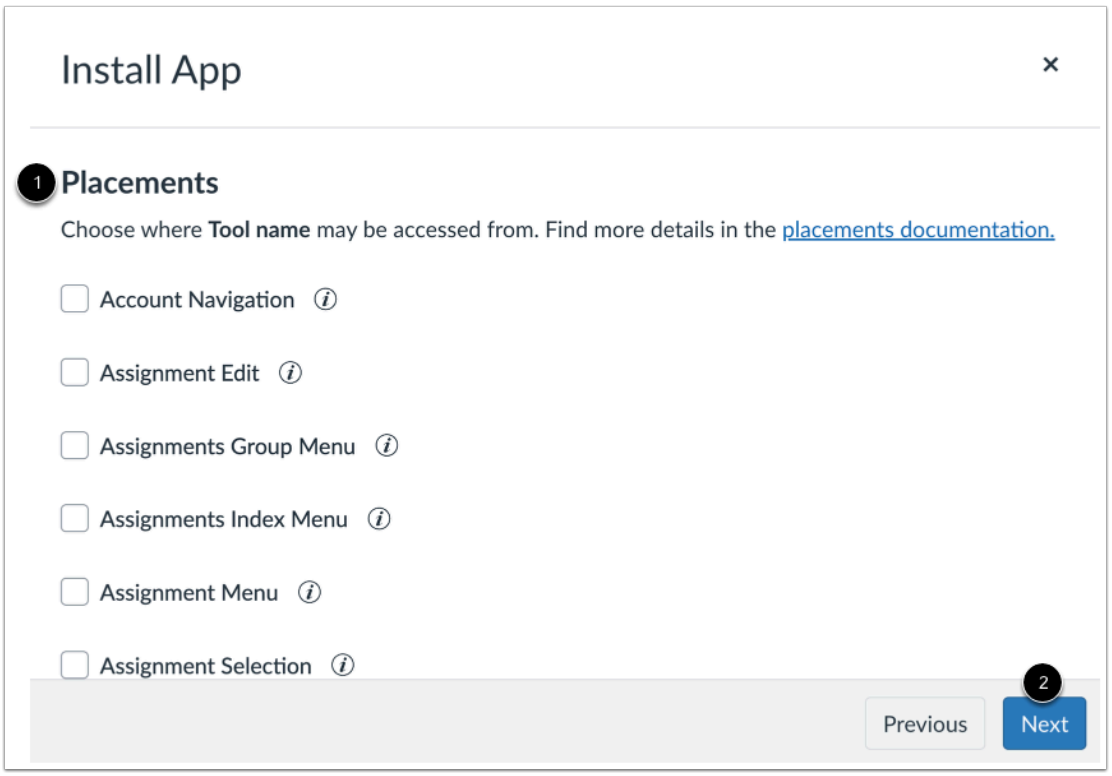


Click the **User Data Shared With This App** drop-down menu [1] and then select what data the tool can access [2]. Options include:

- None (Anonymized)
- User's name only
- User's email only
- All user data

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

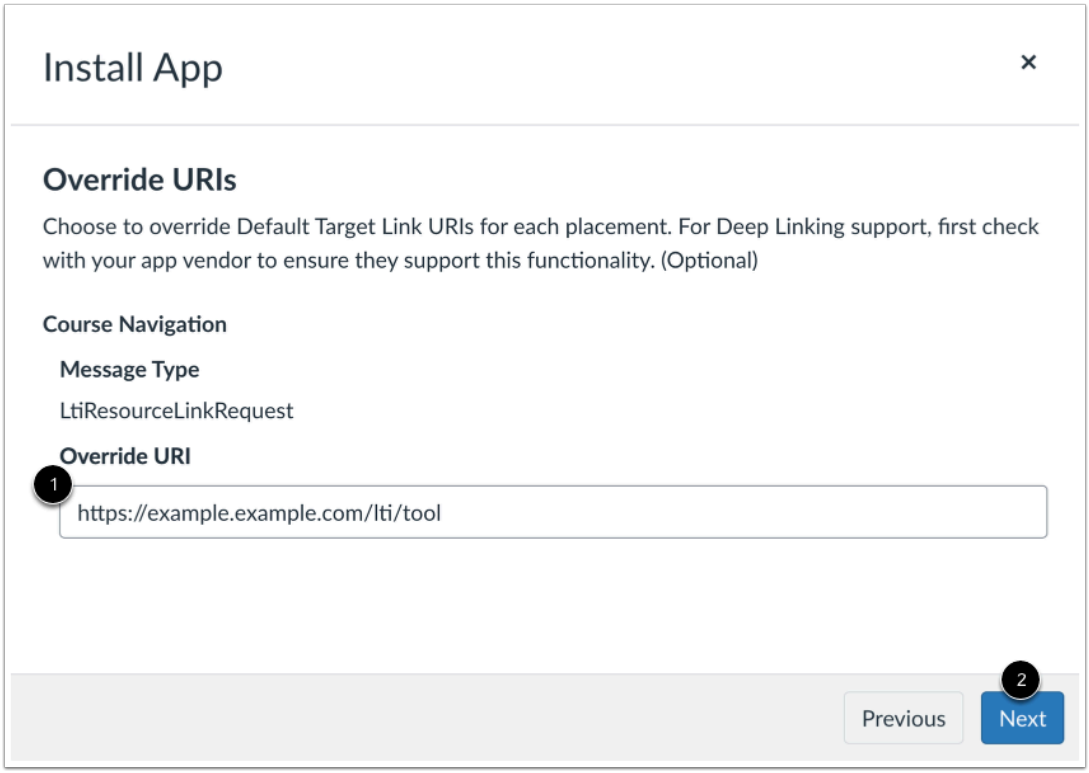
Set Placements



Select where the app can be accessed from [1] and then click the **Next** button [2].

Note: Each placement has an Information icon which shows a screenshot of the location in Canvas as well as a text description of it.

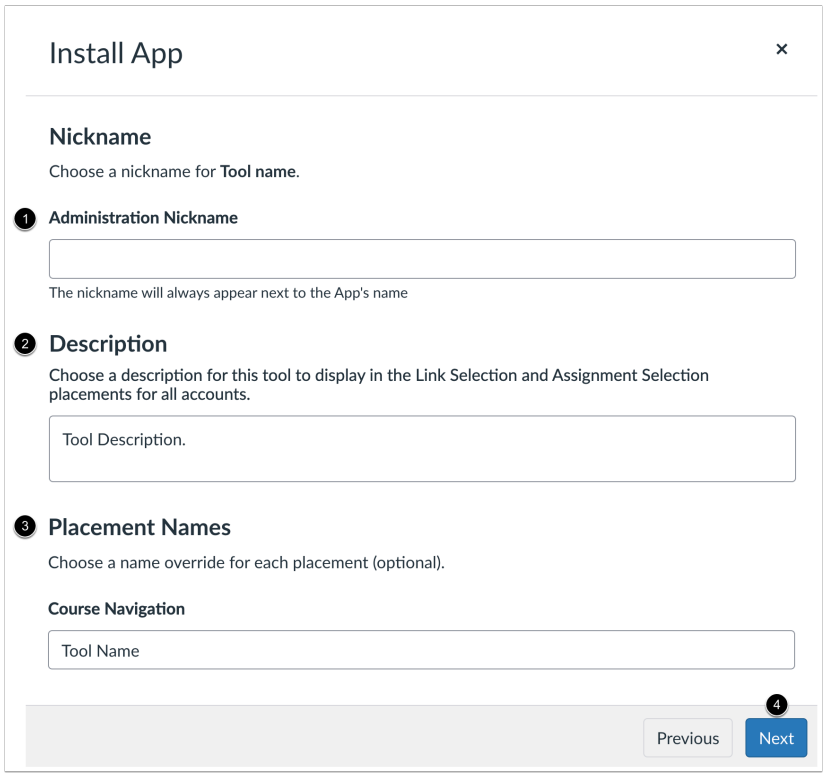
Override URIs



You can choose to override Target Link URIs for the placements you selected [1]. Some tools may be customized to launch to different URIs depending on where in Canvas they are launched from.

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

Add Nickname

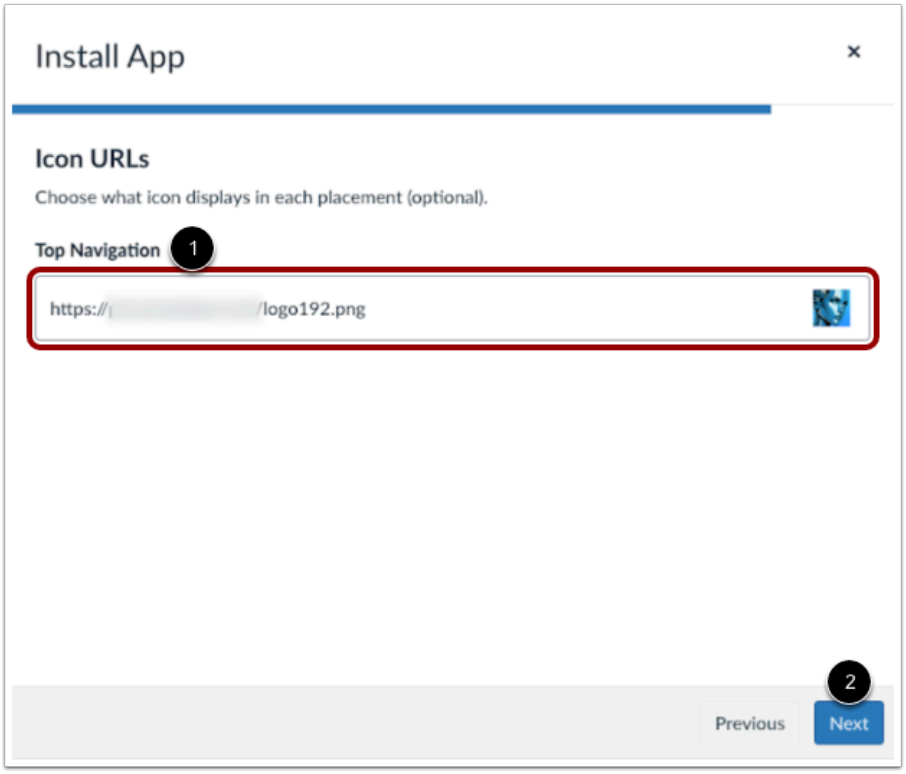


You can add a nickname for the app [1], a short description [2], and a name for each placement [3]. Then, click the **Next** button [4].

Notes:

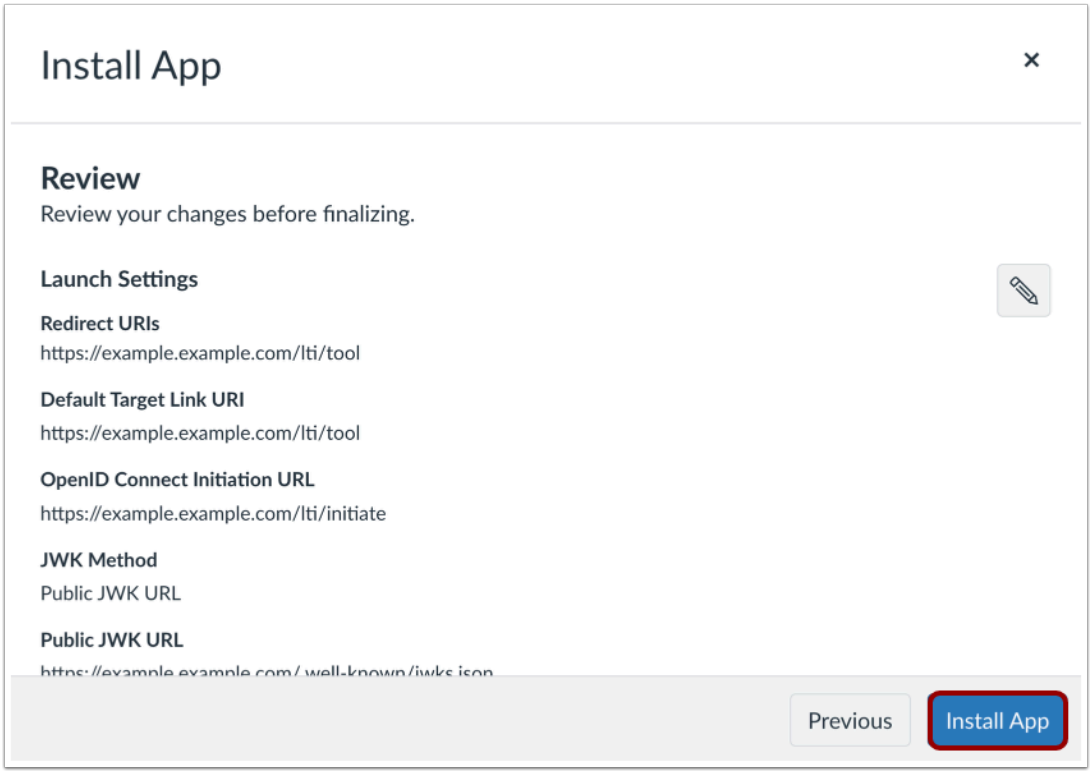
- The Nickname displays in the Manage page. You can use this to indicate any specifics about the tool that helps you identify it such as a campus, sub-account, or other feature.
- The Description field allows you to create a description for users of the tool to see in placements where it is enabled. You may also optionally label the tool differently in certain placements.

Configure Icons



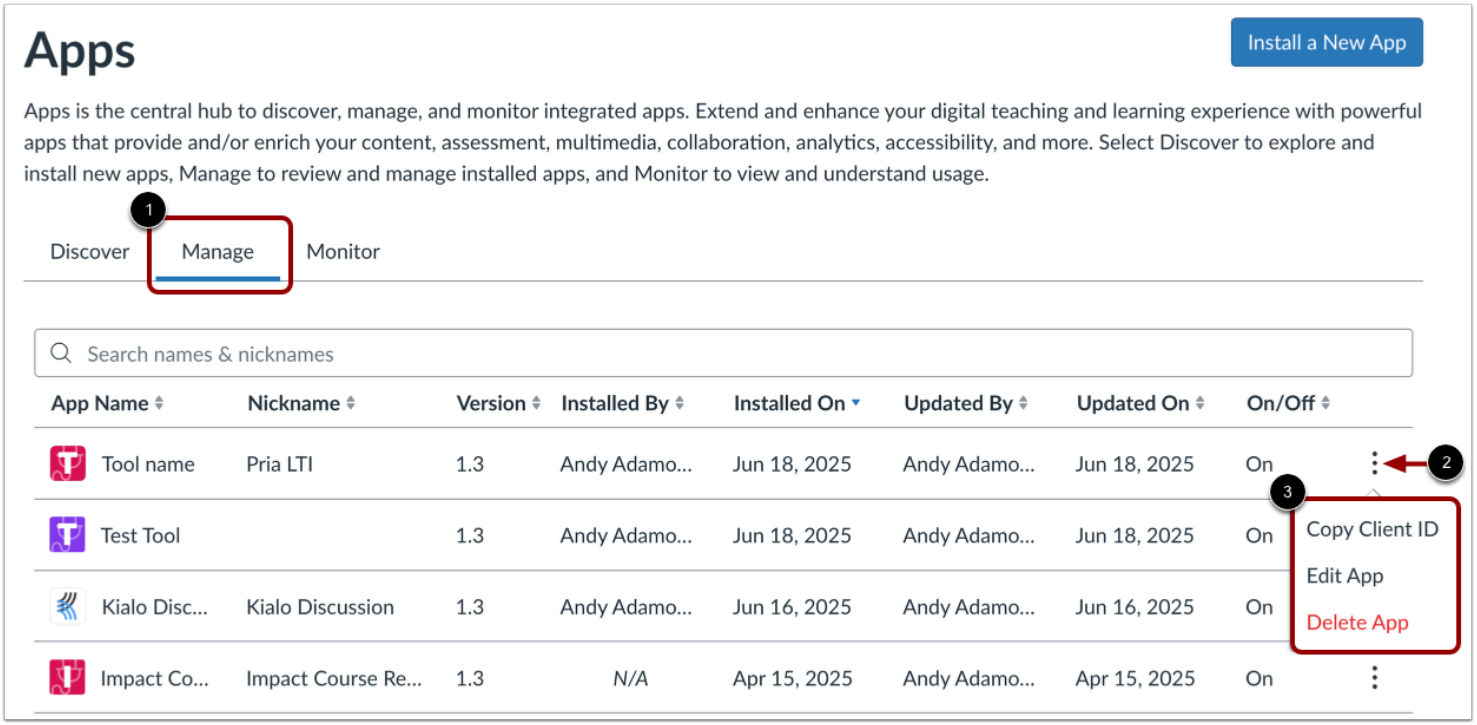
If available, the app's icon URLs display. If the tool has a placement which will display a logo in Canvas, you may add the logo on this screen [1]. Then, click the **Next** button [2].

Review and Install App



Review all the details and then click the **Install App** button.

Manage App



After installation, the app appears in the Manage tab [1]. To manage the app, click the **Options** icon [2]. You can copy the client ID, edit the app, or delete the app [3].

You can also make the app available in the whole account or in specific courses using a client ID.

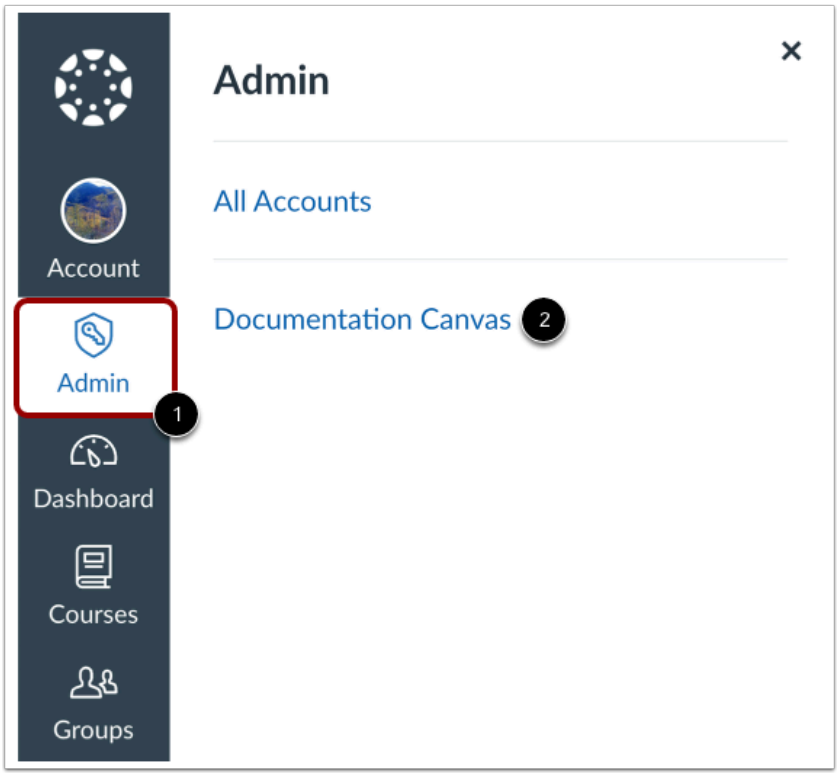
How do I use Canvas Apps?

Canvas Apps is the central hub to discover, manage, and monitor integrated apps. This feature aims to extend and enhance digital teaching and learning experience with powerful apps that provide and/or enrich content, assessment, multimedia, collaboration, analytics, accessibility, and more.

Notes:

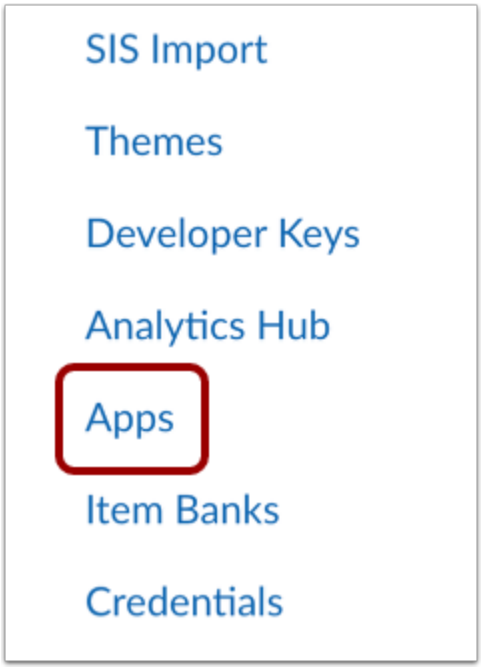
- Canvas Apps is available in the Account Navigation menu and enabled for all institutions.
- Canvas Apps page displays dynamic partner-provided content in the user's selected language.
- Access is limited to root account admins with both the LTI Registrations - manage and Developer Keys - manage permissions.

Open Account



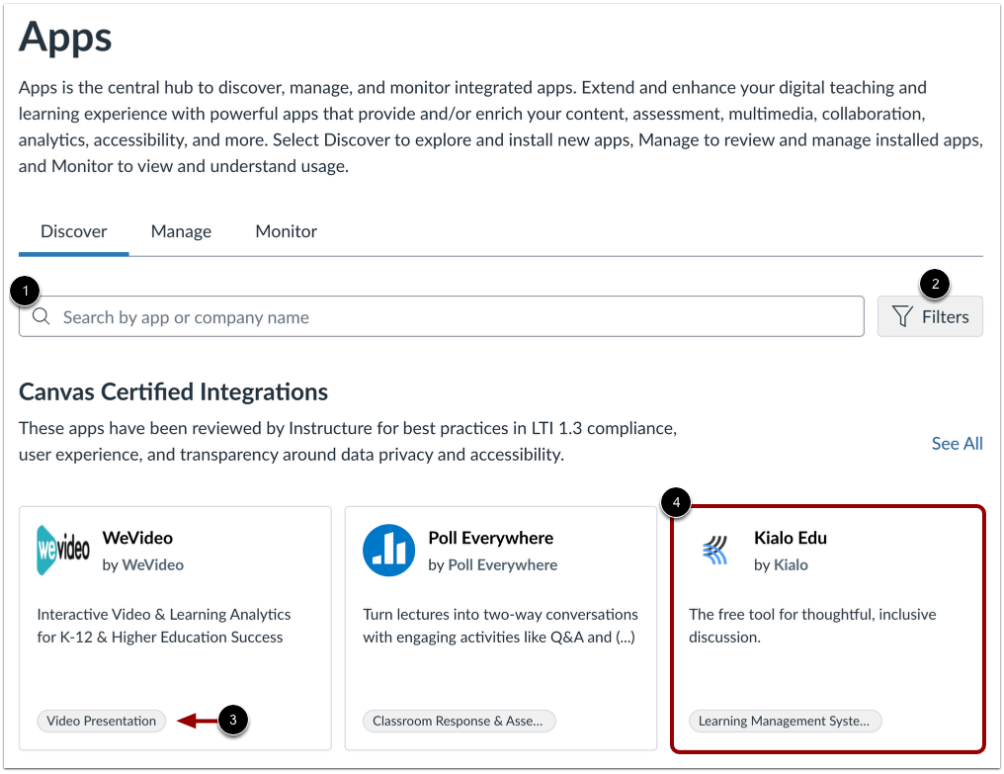
In Global Navigation, click the **Admin** link [1] and then click the name of the account [2].

Open Apps



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

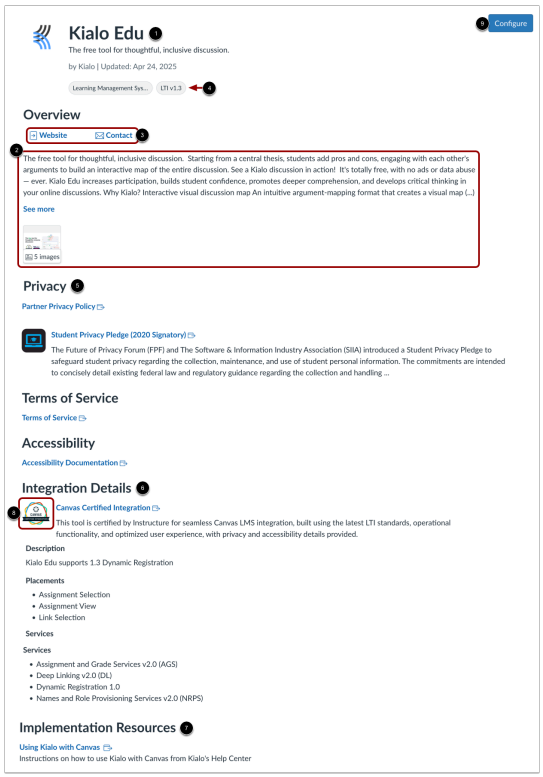
View Discover Tab



The Discover tab displays Canvas-integrated apps. The front page highlights only LTI 1.3 integrated apps, but you can view all available apps using the **Search** field [1] or the **Filters** button [2]. Most tools display a category [3]. This gives an indication of the type of tool and how it could be used.

The listings include apps which were previously accessed as inherited developer keys. If you wish to find more information about the tool provided by the vendor, including any accessibility and privacy documentation they have provided, click the app tile [4].

View Listing Page



Each App or Tool Detail page includes the following information, managed both by Instructure and Partners.

- App name [1]
- Description of the product/tool and images [2]
- Website links and contact information [3]
- LTI 1.1 and/or LTI 1.3 tag [4]

A Partner can also include additional information such as:

- Links for Privacy Policy, Terms of Service and Accessibility documentation [5]
- Integration details, Placements and Services [6]
- Additional resources to support Canvas users in configuring the tool [7]

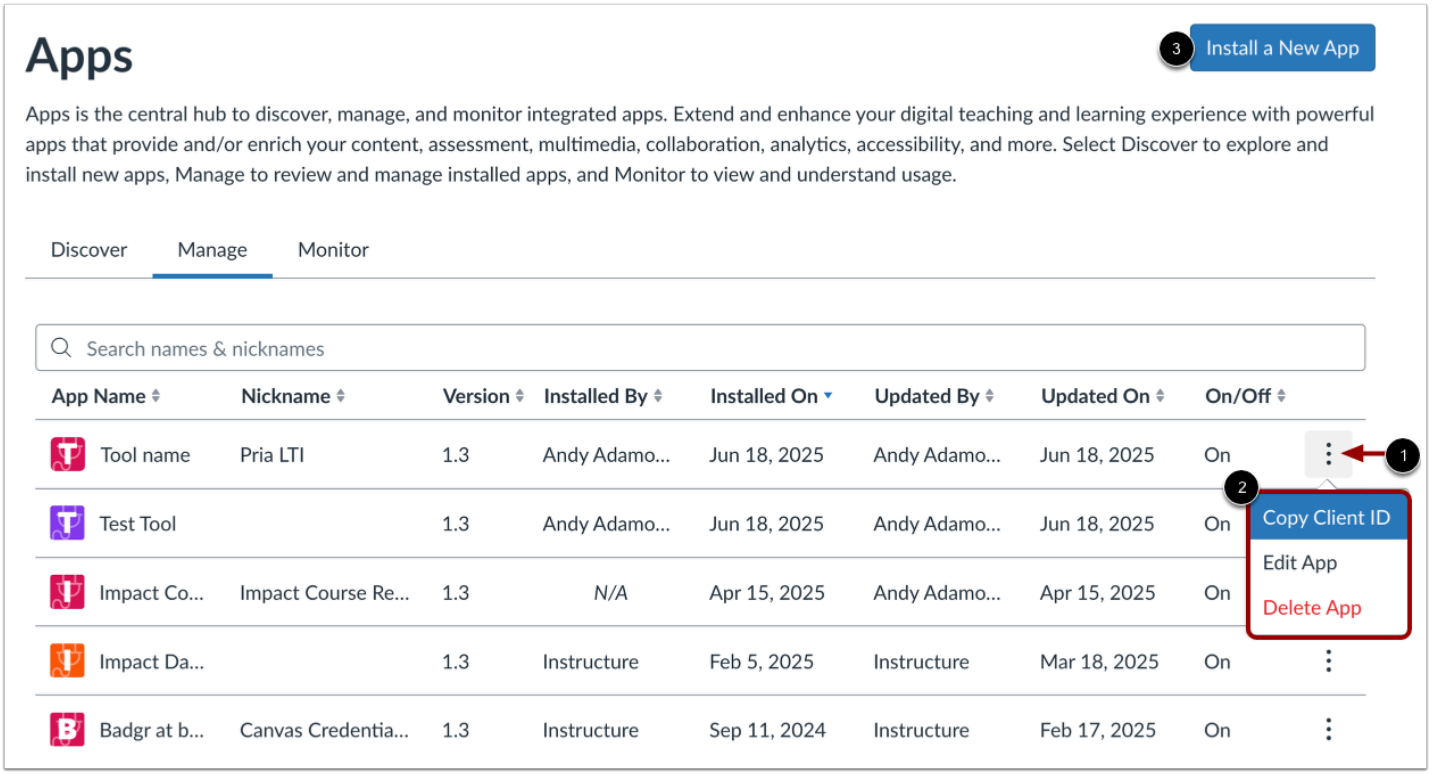
Some apps also include badges from Instructure or third-party groups including [8]:

- Canvas Certified Integration badges
- 1EdTech Trusted Apps badge
- iKeep Safe badges
- Common Sense Privacy Signature badges

- Digital Promise badge
- Project Unicorn Pledge

To install the app, click the **Configure** button [9]. If there's no configuration information available, you may need to add the app manually via the Manage tab.

View Manage Tab

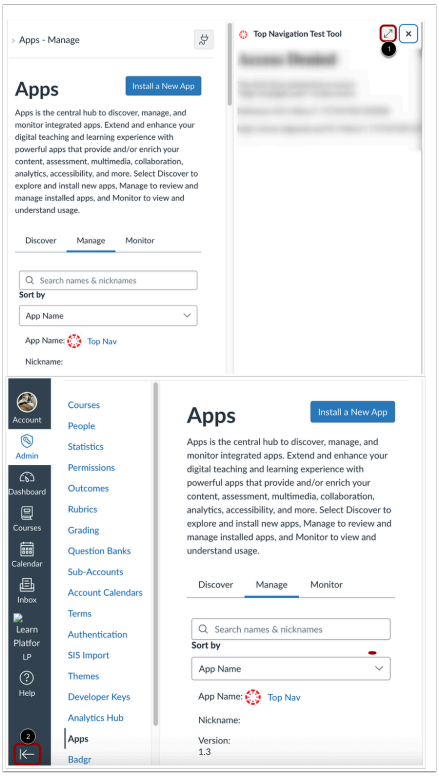


The Manage tab displays a list of all LTI 1.3 configurations that have been set up in your environment.

To manage an existing app, click the **Options** icon [1]. You can copy the client ID, edit the app, or delete the app [2].

To add an app manually or by using Dynamic Registration, JSON, or JSON URL, click the **Install a New App** button [3].

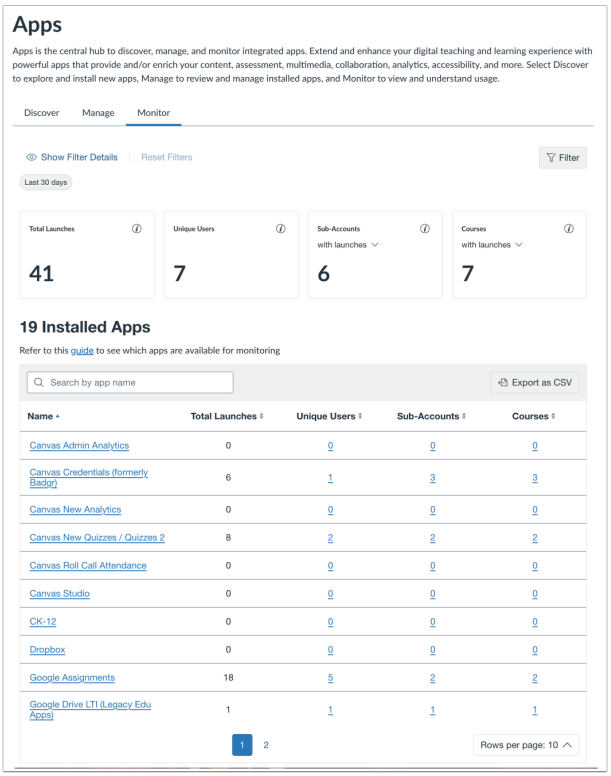
Expand Tool



When the top navigation placement is enabled, you can open the tool in full screen by clicking the **Expand** icon [1].

You can also adjust the window size by minimizing the Global Navigation menu [2].

View Monitor Tab



In the Monitor tab, you can view, filter, compare, and understand which LTI apps are being used by whom, when, and how often. For more information, visit our guide on how to view external apps (LTI) data for an institution.

Note: Only data for the most commonly used LTI apps is available for all Canvas Admins as part of this feature.

What is the current availability of data for LTI apps?

There are thousands of LTI apps available to Canvas LMS users and our goal is to provide you the means to view, analyze, and take action on the data for any/all LTI apps inside of your Canvas instance with the new Monitor LTI Usage feature set and Impact. With the newly created and introduced Global Product ID and Unique Tool ID, we are able to meaningfully aggregate LTI tool data. This also means that LTI Usage data will have a start/effective from date per LTI app. All Root Account Canvas Admins have access to the most commonly used LTI apps in the Monitor tab, whereas Impact by Instructure provides additional, advanced functionality for Impact Admins to view and analyze 100% of their LTI apps through custom grouping.

As such, LTI data, as part of the Monitor LTI Usage feature set, will have staggered availability. The tables below outline LTI app data availability based on configuration inside of the Monitor LTI Usage feature set by LTI App name (as it appears in the Canvas Apps page) and the Availability Start Date. As of now, users will not be able to view historical LTI usage data prior to the dates listed below or for tools not listed below unless they have Impact (for which data starts from the point of Impact installation).

Note(s):

- We will append this table soon to also include the specific configuration details, so that you can use for reference and to help us ensure the utmost accuracy in our Monitor LTI Usage data.
- Customers who were onboarded for InstructureCon had the 2024-08-01 LTI tools available to them 2024-06-21.
- The following LTI tools are currently unsupported: Redirect LTI Tool, Institution-created LTI Tools, and Edlink.

#

LTI Name	Availability Start Date
16Personalities	2024-08-01

A

LTI Name	Availability Start Date
ABCmouse.com	2024-08-01
ABC News	2024-08-01

LTI Name	Availability Start Date
ABCya!	2024-08-01
AcadSource	2024-08-01
Accepi	2024-08-01
Acclaim	2024-08-01
Accommodate HQ	2024-08-01
Accredible	2024-08-01
activeclass	2024-08-01
Actively Learn	2024-08-01
Adobe	2024-08-01
Adobe Connect	2024-08-01
Adobe Creative Cloud	2024-08-01
AES Education	2024-08-01
Agricultural Experience Tracker	2024-08-01
AHIMA Virtual Lab ~ Vlab	2024-08-01
Airtable	2024-08-01
Akindi	2024-08-01
Albert	2024-08-01
ALEKS	2024-08-01
Alexander Street	2024-08-01
AlwaysConnected	2024-08-01
Amazon Web Services - AWS	2024-08-01

LTI Name	Availability Start Date
American College Test (ACT)	2024-08-01
Amplifire	2024-08-01
Amplify	2024-08-01
Animoto	2024-08-01
Annenberg Learner	2024-08-01
Annoto	2024-08-01
Anthology Ally	2024-08-01
Anthology Portfolio	2024-08-01
Apex Learning	2024-08-01
AP Newsroom	2024-08-01
appear.in	2024-08-01
Apporto	2024-08-01
ARC	2024-08-01
Ares automating reserves	2024-08-01
ArtistWorks	2024-08-01
Artsonia - Student Digital Portfolios of Artwork	2024-08-01
ASCD Professional Development Tools	2024-08-01
Ascend Education	2024-08-01
ASSISTments	2024-08-01
Atlas	2024-08-01
Atomic Assessments	2024-08-01

LTI Name	Availability Start Date
Atomic Curriculum Tools	2024-08-01
Atomic Search	2024-08-01
Auralia	2024-08-01
Autodesk	2024-08-01
A Web Whiteboard - AWWapp	2024-08-01
Awesome Stories	2024-08-01
AWS Academy	2024-08-01
AWS Educate	2024-08-01
Aztec Software	2024-08-01
Azure Lab Services	2024-08-01

B

LTI Name	Availability Start Date
BadgeStack	2024-08-01
Barnes & Noble College	2024-08-01
Bartleby	2024-08-01
BibliU	2024-08-01
BigBlueButton	2024-08-01
Blackboard	2024-08-01
Blindside Networks	2024-08-01
Blooket	2024-08-01

LTI Name	Availability Start Date
Blue	2024-08-01
Bongo (formerly YouSeeU)	2024-08-01
Book Creator	2024-08-01
BookWidgets	2024-08-01
Boom Cards	2024-08-01
Boundless	2024-08-01
Box	2024-08-01
Box of Books	2024-08-01
BrainFuse	2024-08-01
BrainPOP	2024-08-01
Bridges Math Learning Center	2024-08-01
Brightspace LeaP	2024-08-01
Britannica Escolar	2024-08-01
Britannica ImageQuest	2024-08-01
Britannica LaunchPacks	2024-08-01
Britannica Moderna	2024-08-01
Britannica School	2024-08-01
Buddycheck	2024-08-01
Build Your Stax	2024-08-01
BurlingtonEnglish	2024-08-01

C

LTI Name	Availability Start Date
Cabri Express Math	2024-08-01
Calendly	2024-08-01
Campus Labs	2024-08-01
Canva	2024-08-01
Canvas Credentials (formerly Badgr)	2024-08-01
Canvas LMS	2024-08-01
Capsim Business Simulations and Assessments Applications	2024-08-01
Carnegie Learning	2024-08-01
Carolina Science Online	2024-08-01
Case Files Teaching Cases	2024-08-01
CDC	2024-08-01
Cengage Learning	2024-08-01
Cerego	2024-08-01
CHARMS	2024-08-01
Chemistry: The Central Science	2024-08-01
Chemvantage	2024-08-01
Chicago Business Press	2024-08-01
Chrome Canvas	2024-08-01
Cidi Labs	2024-08-01

LTI Name	Availability Start Date
CIMA	2024-08-01
CircleIn	2024-08-01
CircuitVerse	2024-08-01
CirQlive MEETS for Cisco Webex	2024-08-01
CirQlive MEETS for Zoom	2024-08-01
Cirrus	2024-08-01
Citation Machine	2024-08-01
Civitas Learning	2024-08-01
CK-12	2024-08-01
Class	2024-08-01
Class Climate	2024-08-01
Class Collaborate (formerly Blackboard Collaborate)	2024-08-01
Classcraft	2024-08-01
ClassDojo	2024-08-01
ClassFlow	2024-08-01
Classkick	2024-08-01
ClassLink	2024-08-01
Classroom Replay	2024-08-01
Classroom Salon	2024-08-01
Classroom Video on Demand	2024-08-01

LTI Name	Availability Start Date
ClassTag	2024-08-01
Clever	2024-08-01
Clutch Prep	2024-08-01
CNN: Breaking US & World News	2024-08-01
CoAssemble	2024-08-01
Codecademy	2024-08-01
CodeCheck	2024-08-01
CodeCombat	2024-08-01
CodeGrade	2024-08-01
CodeHS	2024-08-01
CodeLab	2024-08-01
Code.org	2024-08-01
CodeSnaps	2024-08-01
Codio	2024-08-01
CogBooks	2024-08-01
Cognii	2024-08-01
Collaaj	2024-08-01
College Board	2024-08-01
Collins Dictionary	2024-08-01
CommonLit	2024-08-01
Complete Anatomy	2024-08-01

LTI Name	Availability Start Date
Compuscholar	2024-08-01
ConexED	2024-08-01
Connect	2024-08-01
Connect 4 Education (C4E)	2024-08-01
ConnectED	2024-08-01
CoolMath.com	2024-08-01
CoolMath Games	2024-08-01
Copyleaks	2024-08-01
Cornerstone OnDemand for K-12	2024-08-01
CourseArc	2024-08-01
CourseEval HQ	2024-08-01
Courseload	2024-08-01
Coursera	2024-08-01
CPM Educational Program	2024-08-01
Cranium Cafe	2024-08-01
Credly	2024-08-01
Credo Reference	2024-08-01
CritViz	2024-08-01
Curiosity.com	2024-08-01
Curriki	2024-08-01

D

LTI Name	Availability Start Date
DataCamp	2024-08-01
Data.World	2024-08-01
Delphinium	2024-08-01
DeltaMath	2024-08-01
Derivita	2024-08-01
Desmos	2024-08-01
Deutsche Welle (DW)	2024-08-01
Dictionary.com	2024-08-01
Dictionary Linguee	2024-08-01
Didax	2024-08-01
Digication ePortfolio	2024-08-01
DigiExam Solutions	2024-08-01
Diigo	2024-08-01
Discovery Education	2024-08-01
DocHub	2024-08-01
Docuseek	2024-08-01
Doodle	2024-08-01
DreamBox Learning	2024-08-01
DreamBox Reading Plus	2024-08-01

LTI Name	Availability Start Date
Dreamscape Learn	2024-08-01
Dropbox	2024-08-01
Dropout Detective	2024-08-01
DropThought	2024-08-01
Ducksters	2024-08-01
Duolingo	2024-08-01

E

LTI Name	Availability Start Date
EAB	2024-08-01
Earthquakes for Kids	2024-08-01
EasyBib	2024-08-01
EBSCO Information Services	2024-08-01
Echo360	2024-08-01
Econ Lowdown	2024-08-01
ecree	2024-08-01
EdClub	2024-08-01
Edheads	2024-08-01
Edmentum	2024-08-01
Edpuzzle	2024-08-01
EduBase	2024-08-01

LTI Name	Availability Start Date
Educaplay	2024-08-01
Edugence	2024-08-01
eduplace.com	2024-08-01
EduTyping	2024-08-01
eDynamic Learning	2024-08-01
Electude	2024-08-01
Eli Review	2024-08-01
Elsevier	2024-08-01
EMC School	2024-08-01
EnglishCentral	2024-08-01
Epic!	2024-08-01
Equatio	2024-08-01
Essential Education	2024-08-01
Evan-Moor	2024-08-01
Everfi K-12	2024-08-01
Everspring	2024-08-01
ExamSoft	2024-08-01
Exemplars	2024-08-01
Ex Libris	2024-08-01
Expert TA	2024-08-01
Explain Everything	2024-08-01

LTI Name	Availability Start Date
Explore	2024-08-01
ExploreLearning	2024-08-01

F

LTI Name	Availability Start Date
Facebook	2024-08-01
F.A. Davis Company	2024-08-01
FASB ~ Financial Accounting Standards Board	2024-08-01
Feedback Box	2024-08-01
FeedbackFruits	2024-08-01
FEV Tutor	2024-08-01
Filament Games	2024-08-01
Films on Demand	2024-08-01
First In Math	2024-08-01
Fiveable	2024-08-01
Flash Reference	2024-08-01
Flat	2024-08-01
FlatWorld	2024-08-01
Flinga	2024-08-01
Flinn Scientific	2024-08-01
FLIP	2024-08-01

LTI Name	Availability Start Date
Flocabulary	2024-08-01
Floop	2024-08-01
Florida Virtual School (FLVS)	2024-08-01
Flowlab	2024-08-01
FluentKey	2024-08-01
Foliotek	2024-08-01
Follett Discover	2024-08-01
ForClass	2024-08-01
Formative	2024-08-01
FormStack	2024-08-01
FOSSweb	2024-08-01
FoundationsDigital	2024-08-01
Freckle by Renaissance	2024-08-01
Free Integrated Linux Virtual Machines by Abstultus	2024-08-01
Freeplay Music	2024-08-01
Frontline Education	2024-08-01
Funbrain	2024-08-01
Future Farmers of America Organization	2024-08-01

G

LTI Name	Availability Start Date
Gale in Context: Elementary	2024-08-01
Gale in Context: Global Issues	2024-08-01
Gale in Context: Middle School	2024-08-01
Gale in Context: Opposing Viewpoints	2024-08-01
Gale In Context: Science	2024-08-01
Game Learning	2024-08-01
Generation Genius	2024-08-01
Genially	2024-08-01
GeoGebra	2024-08-01
GetSet	2024-08-01
Getty	2024-08-01
GG4L - The Global Grid for Learning	2024-08-01
Gimkit	2024-08-01
Git	2024-08-01
GitHub	2024-08-01
GivePulse	2024-08-01
Gleim Remote Pilot Kit	2024-08-01
GlowScript	2024-08-01
GMetrix	2024-08-01

LTI Name	Availability Start Date
Go Ask Alice!	2024-08-01
Goboard	2024-08-01
Goodreads	2024-08-01
Google Assignments	2024-08-01
Google Calendar	2024-08-01
Google Classroom	2024-08-01
Google Docs	2024-08-01
Google Drive	2024-08-01
Google Maps	2024-08-01
Google Meet	2024-08-01
Google Sites	2024-08-01
GoReact	2024-08-01
GradeHub	2024-08-01
Gradescope	2024-08-01
GradeSlam	2024-08-01
Grammarly	2024-08-01
Grasple	2024-08-01
G-W Online Textbooks	2024-08-01

H

LTI Name	Availability Start Date
H5P	2024-08-01
Hands-On Labs	2024-08-01
Harvard Business Publishing	2024-08-01
Hawkes Learning	2024-08-01
Health Assessment	2024-08-01
Heroku	2024-08-01
Honorlock	2024-08-01
Houghton Mifflin Harcourt (HMH)	2024-08-01
Hypothes.is	2024-08-01

I

LTI Name	Availability Start Date
IBM	2024-08-01
iCEV	2024-08-01
iCivics	2024-08-01
iClicker	2024-08-01
IllumiDesk	2024-08-01
ilos Videos	2024-08-01
iLrn	2024-08-01
Imagine Edgenuity	2024-08-01

LTI Name	Availability Start Date
Imagine Learning	2024-08-01
IMathAS	2024-08-01
Impact	2024-08-01
Infobase	2024-08-01
Inner Explorer	2024-08-01
InScribe	2024-08-01
Instructor Insight	2024-08-01
Intelitek: Advanced Manufacturing	2024-08-01
Intellus Learning	2024-08-01
Internet Archive	2024-08-01
Internet History Sourcebooks Project	2024-08-01
Interplay Learning	2024-08-01
Interpretive Simulations	2024-08-01
i-Ready	2024-08-01
Issuu	2024-08-01
ISTE - International Society for Technology in Education	2024-08-01
IXL Learning	2024-08-01

J

LTI Name	Availability Start Date
Jamboard	2024-08-01

LTI Name	Availability Start Date
JeopardyLabs	2024-08-01
Jones & Bartlett Learning	2024-08-01
JoVE Science Education	2024-08-01
Junction	2024-08-01
JuniorTube	2024-08-01
Just for Kids Streaming Collection	2024-08-01

K

LTI Name	Availability Start Date
Kahoot!	2024-08-01
Kaltura Video Cloud Platform for Education	2024-08-01
Kami	2024-08-01
Kanopy	2024-08-01
KenKen Puzzle Official Site	2024-08-01
Keyboarding Online	2024-08-01
Khan Academy	2024-08-01
Kiddle	2024-08-01
Kiddom	2024-08-01
Kikora	2024-08-01
Knack	2024-08-01
Knewton Alta	2024-08-01

LTI Name	Availability Start Date
Knowledge Matters	2024-08-01
Kortext	2024-08-01
Kumospace	2024-08-01

L

LTI Name	Availability Start Date
LabArchives	2024-08-01
LabSim	2024-08-01
LabsLand	2024-08-01
Labster Laboratory Simulations	2024-08-01
Labyrinth eLab	2024-08-01
Lalilo	2024-08-01
Late Nite Labs	2024-08-01
Learn360	2024-08-01
Learning A-Z	2024-08-01
Learning A-Z : Kids A-Z	2024-08-01
Learning.com	2024-08-01
Learning Farm	2024-08-01
Learning Objects	2024-08-01
learnmax	2024-08-01
LearnZillion	2024-08-01

LTI Name	Availability Start Date
Legends of Learning	2024-08-01
Leo	2024-08-01
Level Learning (Previously LevelChinese)	2024-08-01
Lexia Core5 Reading	2024-08-01
Lexia : PowerUp Literacy	2024-08-01
LibApps	2024-08-01
LibGuides	2024-08-01
Lingco Classroom	2024-08-01
LinkedIn	2024-08-01
LinkedIn Learning	2024-08-01
Lion's Heart	2024-08-01
LIRN Proxy	2024-08-01
Listenwise	2024-08-01
LiveBinders	2024-08-01
LiveText by Watermark	2024-08-01
liveworksheets	2024-08-01
Lucidchart	2024-08-01
Lumen Learning	2024-08-01
Lumen OHM	2024-08-01
Lumio	2024-08-01
lynda.com	2024-08-01

M

LTI Name	Availability Start Date
MackinVIA	2024-08-01
Macmillan Learning	2024-08-01
MagicBox	2024-08-01
MakeMusic Cloud	2024-08-01
Marine Science 101	2024-08-01
Markdown Editor	2024-08-01
Marketplace Simulations	2024-08-01
Mastery Connect	2024-08-01
Math is Fun	2024-08-01
Math Nation	2024-08-01
Math Open Reference	2024-08-01
Mathspace	2024-08-01
MathXL for School	2024-08-01
MATLAB and Simulink Online Courses	2024-08-01
McGraw Hill	2024-08-01
McGraw Hill Campus	2024-08-01
MediaAMP	2024-08-01
MEDIAL Canvas Video Assignment App	2024-08-01
Mediasite	2024-08-01

LTI Name	Availability Start Date
MERLOT	2024-08-01
Merriam-Webster	2024-08-01
Microsoft MakeCode	2024-08-01
Microsoft Office 365	2024-08-01
Mindomo Mind Mapping	2024-08-01
Mind Tools	2024-08-01
Miro	2024-08-01
MIT App Inventor	2024-08-01
Möbius	2024-08-01
MobLab	2024-08-01
MobyMax	2024-08-01
Mosa Mack: Science	2024-08-01
MusicTheory.net	2024-08-01
Muzzy Lane Author	2024-08-01
MyAttendanceTracker	2024-08-01
myBusinessCourse	2024-08-01
myEducator	2024-08-01
My IB	2024-08-01
My Kinder Moments	2024-08-01
MyLab History	2024-08-01
MyLab Math	2024-08-01

LTI Name	Availability Start Date
MyOpenMath	2024-08-01
MyShowcase	2024-08-01

N

LTI Name	Availability Start Date
NameCoach	2024-08-01
NASA: Solar System Exploration	2024-08-01
National Geographic Kids	2024-08-01
National Science Teaching Association - NSTA	2024-08-01
Naviance	2024-08-01
NBC Learn	2024-08-01
Nearpod	2024-08-01
NeoK12	2024-08-01
NetTutor	2024-08-01
Newsela	2024-08-01
Niche Academy	2024-08-01
NinGenius Music Online	2024-08-01
Nitro Type	2024-08-01
Noodle Factory	2024-08-01
NoRedink (No Red Ink)	2024-08-01
NoteBowl	2024-08-01

LTI Name	Availability Start Date
Noteflight	2024-08-01
NowComment	2024-08-01
NYTimes.com	2024-08-01

O

LTI Name	Availability Start Date
Odigia	2024-08-01
OER Commons	2024-08-01
OER Project	2024-08-01
OneNote	2024-08-01
Open Badge Factory	2024-08-01
OpenEd	2024-08-01
OpenStax	2024-08-01
OpenStax Tutor	2024-08-01
Open Up Resources	2024-08-01
Oracle	2024-08-01
OrbitNote	2024-08-01
Osmosis	2024-08-01
Overleaf	2024-08-01
Oxford Learning Link	2024-08-01

P

LTI Name	Availability Start Date
Packback	2024-08-01
Padlet	2024-08-01
panOpen	2024-08-01
Panopto	2024-08-01
PaperScorer	2024-08-01
Participate	2024-08-01
PayGrade	2024-08-01
PBS	2024-08-01
PBS Kids	2024-08-01
PBS LearningMedia	2024-08-01
Pear Assessment (formerly Edulastic)	2024-08-01
Pear Deck	2024-08-01
Pear Deck Tutor (formerly TutorMe)	2024-08-01
Pearson	2024-08-01
Pearson Access Next	2024-08-01
Pearson MyLab and Mastering	2024-08-01
Pearson US History	2024-08-01
PebblePad	2024-08-01
Peer Assess Pro	2024-08-01

LTI Name	Availability Start Date
Peerceptiv	2024-08-01
peergrade	2024-08-01
Penda Learning	2024-08-01
Penn State World Campus	2024-08-01
Peregrine	2024-08-01
Perusall	2024-08-01
PhET Interactive Simulations	2024-08-01
Piazza	2024-08-01
Picmonic	2024-08-01
Piktochart	2024-08-01
Pisces	2024-08-01
Pivot Interactives	2024-08-01
Pixilart	2024-08-01
Pixton	2024-08-01
PlagScan	2024-08-01
Planbook.com	2024-08-01
Planet eStream	2024-08-01
PlayPosit	2024-08-01
Poll Everywhere	2024-08-01
Polly	2024-08-01
Ponddy Reader	2024-08-01

LTI Name	Availability Start Date
PowerMyLearning	2024-08-01
PowerSchool: Performance Matters	2024-08-01
Powtoon	2024-08-01
Practice	2024-08-01
Practice Labs	2024-08-01
Prezi	2024-08-01
Proctor360	2024-08-01
ProctorFree	2024-08-01
Proctorio	2024-08-01
Proctortrack	2024-08-01
ProctorU	2024-08-01
Prodigy	2024-08-01
ProjectCampus	2024-08-01
Project Lead The Way (PLTW)	2024-08-01
Pronto	2024-08-01
ProQuest	2024-08-01
Prulu	2024-08-01
Ptable	2024-08-01
Purdue Online Writing Lab	2024-08-01
PurposeGames	2024-08-01
Puzzel.org	2024-08-01

LTI Name	Availability Start Date
PY4E (Python for Everybody)	2024-08-01

Q

LTI Name	Availability Start Date
Qualtrics Education XM	2024-08-01
QuaverMusic	2024-08-01
Questionmark OnDemand	2024-08-01
QuestionPress	2024-08-01
Quia Web	2024-08-01
Quill	2024-08-01
Quizizz	2024-08-01
Quizlet	2024-08-01

R

LTI Name	Availability Start Date
Raz-Kids	2024-08-01
Raz-Plus	2024-08-01
ReadSpeaker	2024-08-01
ReadTheory	2024-08-01
ReadWorks	2024-08-01
Realizeit	2024-08-01
Reddit	2024-08-01

LTI Name	Availability Start Date
Redirect Plus	2024-08-01
Redirect Tool	2024-08-01
RedShelf	2024-08-01
Reflex (Reflex Math)	2024-08-01
Remind	2024-08-01
Remote Proctor Now	2024-08-01
Renaissance	2024-08-01
Renaissance : myON Reader	2024-08-01
replit	2024-08-01
Respondus	2024-08-01
Respondus LockDown Browser	2024-08-01
RethinkEd	2024-08-01
Revel	2024-08-01
Review Game Zone	2024-08-01
rewordify.com	2024-08-01
Rezzly	2024-08-01
Riipen	2024-08-01
Roll20	2024-08-01
Rosetta Stone	2024-08-01
Rubin Education	2024-08-01
Ruzuku	2024-08-01

S

LTI Name	Availability Start Date
Safari	2024-08-01
Safari Montage	2024-08-01
Sapling Learning	2024-08-01
SAS Curriculum Pathways	2024-08-01
Savvas Realize	2024-08-01
Saylor Courses	2024-08-01
Scholastic	2024-08-01
Scholastic Classroom Magazines	2024-08-01
SchoolAI	2024-08-01
School Loop	2024-08-01
SchoolPay	2024-08-01
SchoolTube	2024-08-01
School Yourself	2024-08-01
ScootPad	2024-08-01
SCORM.com	2024-08-01
ScreenPal	2024-08-01
Scribblar.com	2024-08-01
Scrible	2024-08-01
SeatGen	2024-08-01

LTI Name	Availability Start Date
Seesaw	2024-08-01
Senor Wooly (Señor Wooly)	2024-08-01
SensusAccess	2024-08-01
Shmoop	2024-08-01
ShowMe	2024-08-01
Sibme	2024-08-01
Sight Reading Factory	2024-08-01
SignSchool	2024-08-01
SignUpGenius	2024-08-01
Simple Syllabus	2024-08-01
SIMTICS	2024-08-01
SIRS Decades	2024-08-01
Skillsoft	2024-08-01
Skyward	2024-08-01
Slack Technologies	2024-08-01
Slader	2024-08-01
SlideShare	2024-08-01
Smarter Measure	2024-08-01
SmarterProctoring	2024-08-01
SmarterServices	2024-08-01
Smarthinking	2024-08-01

LTI Name	Availability Start Date
Smart Sparrow	2024-08-01
Smore	2024-08-01
SNAP	2024-08-01
Snippets	2024-08-01
Socrative	2024-08-01
Sofia	2024-08-01
SoftChalk	2024-08-01
SoftChalk Cloud	2024-08-01
Solid Professor	2024-08-01
Sora by OverDrive	2024-08-01
SoundCloud	2024-08-01
Soundtrap	2024-08-01
SplashLearn	2024-08-01
Springboard	2024-08-01
Starfall	2024-08-01
Starfish	2024-08-01
STEMscopes	2024-08-01
ST Math	2024-08-01
Storify	2024-08-01
Storyboard That	2024-08-01
Storyline Online	2024-08-01

LTI Name	Availability Start Date
Storyworks	2024-08-01
Studies Weekly	2024-08-01
StudioWeb	2024-08-01
Study.com	2024-08-01
StudyForge	2024-08-01
Study Island	2024-08-01
StudyMate	2024-08-01
Study.Net	2024-08-01
StudySync	2024-08-01
Stukent	2024-08-01
SurveyMonkey	2024-08-01
Sutori	2024-08-01

T

LTI Name	Availability Start Date
Talis Aspire	2024-08-01
TCI (Teachers' Curriculum Institute)	2024-08-01
TeacherMade	2024-08-01
TeacherTube	2024-08-01
TeachingBooks	2024-08-01
TeachMe : Math Games	2024-08-01

LTI Name	Availability Start Date
TechSmith Relay	2024-08-01
TED	2024-08-01
TenMarks	2024-08-01
Testing & Education Reference Center	2024-08-01
ThatQuiz	2024-08-01
The Bedford Reader	2024-08-01
The DBQ Project	2024-08-01
The Physics Classroom	2024-08-01
The Rhythm Randomizer	2024-08-01
The Rhythm Trainer	2024-08-01
The Stock Market Game	2024-08-01
The Weather Channel	2024-08-01
ThingLink	2024-08-01
Think Central	2024-08-01
TidyUP: File Cleanup Tool for Canvas	2024-08-01
TIME.com	2024-08-01
TimeMap	2024-08-01
Timestables.com	2024-08-01
Tinkercad	2024-08-01
TinyUrl.com	2024-08-01
Togetherall	2024-08-01

LTI Name	Availability Start Date
Toolwire	2024-08-01
Top Hat	2024-08-01
Townsend Press	2024-08-01
Trello	2024-08-01
True+Way ASL	2024-08-01
TsugiCloud	2024-08-01
Tumblr	2024-08-01
Turning Technologies	2024-08-01
Turnitin	2024-08-01
Tutor.com	2024-08-01
TweenTribune	2024-08-01
TypeIt	2024-08-01
TypeTastic	2024-08-01
Typing.com	2024-08-01
Typsy	2024-08-01

U

LTI Name	Availability Start Date
uCertify LEARN	2024-08-01
Unicheck	2024-08-01
USATestprep	2024-08-01

LTI Name	Availability Start Date
U.S. Cyber Range	2024-08-01
Utah Compose	2024-08-01
Utah Education Network - UEN	2024-08-01

V

LTI Name	Availability Start Date
Vedamo Virtual Classroom	2024-08-01
Vevox	2024-08-01
Vialogues	2024-08-01
Vimeo	2024-08-01
Virtual Enterprise International	2024-08-01
Visible Body	2024-08-01
Vista Higher Learning	2024-08-01
Visual Classrooms	2024-08-01
VitalSource	2024-08-01
Vizia	2024-08-01
Vocabulary.com	2024-08-01
Vocabulary Spelling City	2024-08-01
Vocareum	2024-08-01
VoiceThread	2024-08-01
Voki	2024-08-01

W

LTI Name	Availability Start Date
W3Schools	2024-08-01
Watermark Insights	2024-08-01
Wayside Publishing	2024-08-01
WCONLINE	2024-08-01
WeatherSTEM	2024-08-01
WebAssign	2024-08-01
WebElements Periodic Table of the Elements	2024-08-01
WebEx	2024-08-01
Weebly	2024-08-01
WeVideo Education	2024-08-01
Whiteboard.fi by Kahoot	2024-08-01
Wikimedia Commons	2024-08-01
Wikipedia	2024-08-01
Wiley	2024-08-01
Wiley Efficient Learning	2024-08-01
WileyPLUS	2024-08-01
Willo Labs	2024-08-01
Wix	2024-08-01
WordPress	2024-08-01

LTI Name	Availability Start Date
WordReference.com	2024-08-01
World101 from the Council on Foreign Relations	2024-08-01
World Book Online	2024-08-01
World Religions	2024-08-01
Writable	2024-08-01
W.W. Norton	2024-08-01

X

LTI Name	Availability Start Date
XanEdu	2024-08-01
Xorro-Q	2024-08-01
XtraMath	2024-08-01
XWiki	2024-08-01

Y

LTI Name	Availability Start Date
Yahoo!	2024-08-01
Yellowdig	2024-08-01
YoTeach	2024-08-01
YouScience	2024-08-01
YouTube	2024-08-01
YuJa	2024-08-01

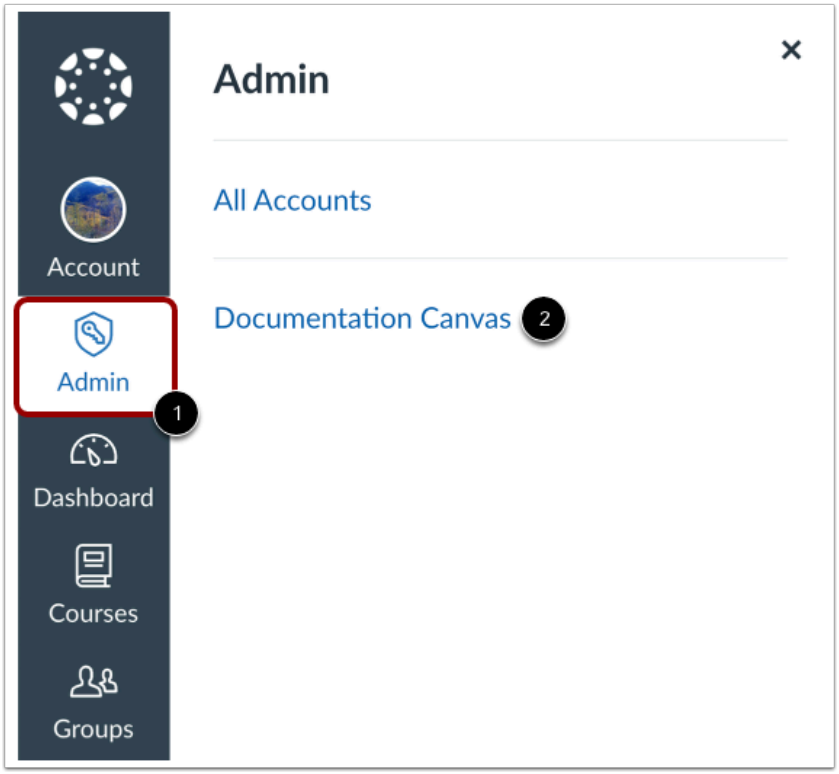
Z

LTI Name	Availability Start Date
Zearn	2024-08-01
Zendesk	2024-08-01
Ziteboard	2024-08-01
Zoom	2024-08-01
zyBooks	2024-08-01

How do I view and filter individual LTI tool data?

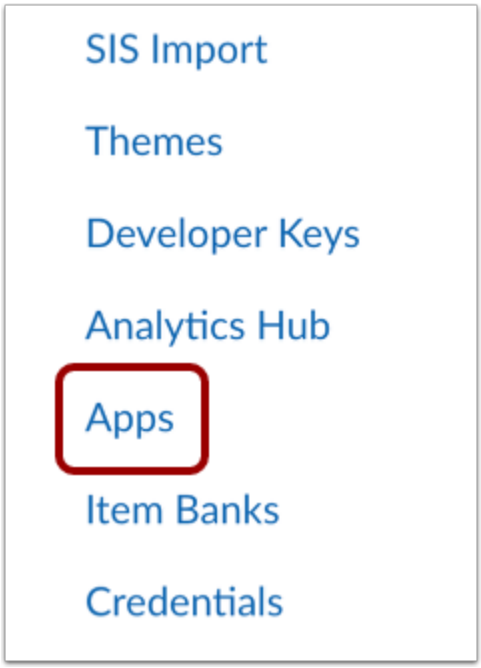
As a Canvas root admin, you can open individual installed LTI tools to see a detailed report on its specific usage. This view summarizes overall activity and engagement, and highlights the users and areas with hemost interaction. The data can also be filtered by various criteria to further customize the report.

Open Account



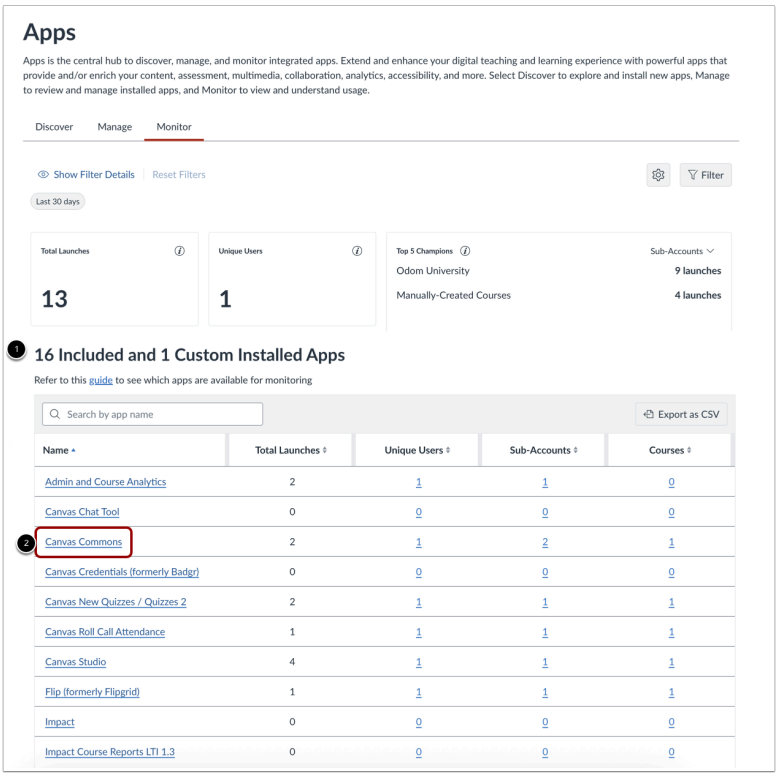
In Global Navigation, click the **Admin** link [1] and then click the name of the account [2].

Open Apps



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

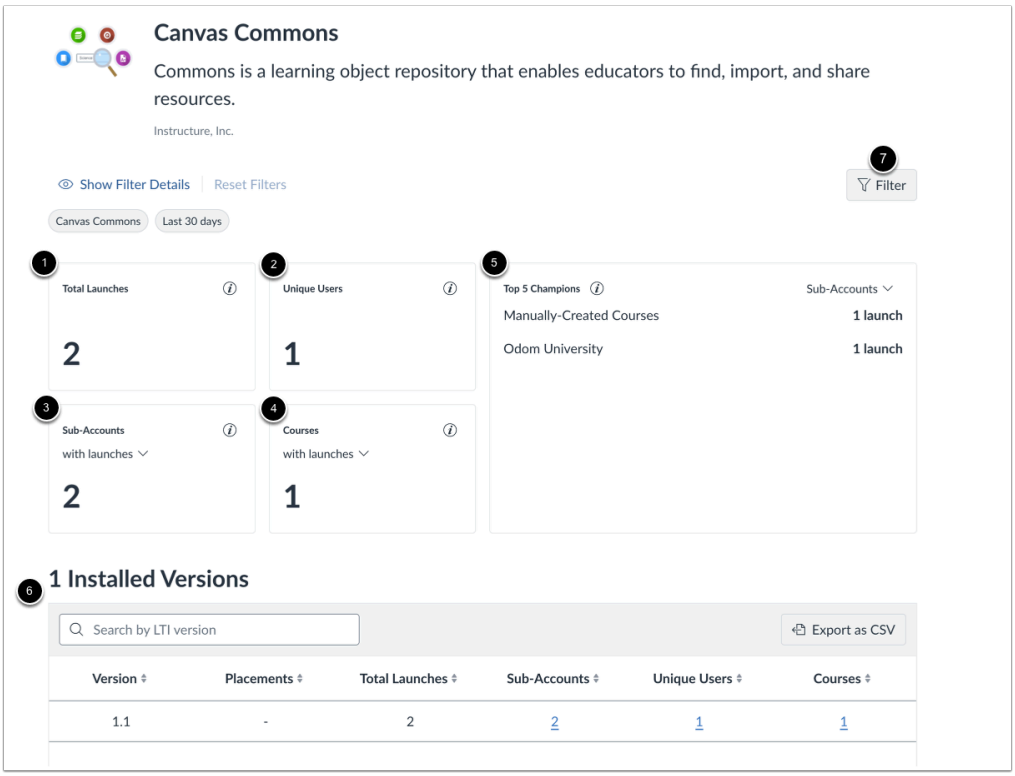
View App Data



In the Apps page, navigate to the Installed Tools list [1].

Then locate and click the **LTI Tool** name [2]

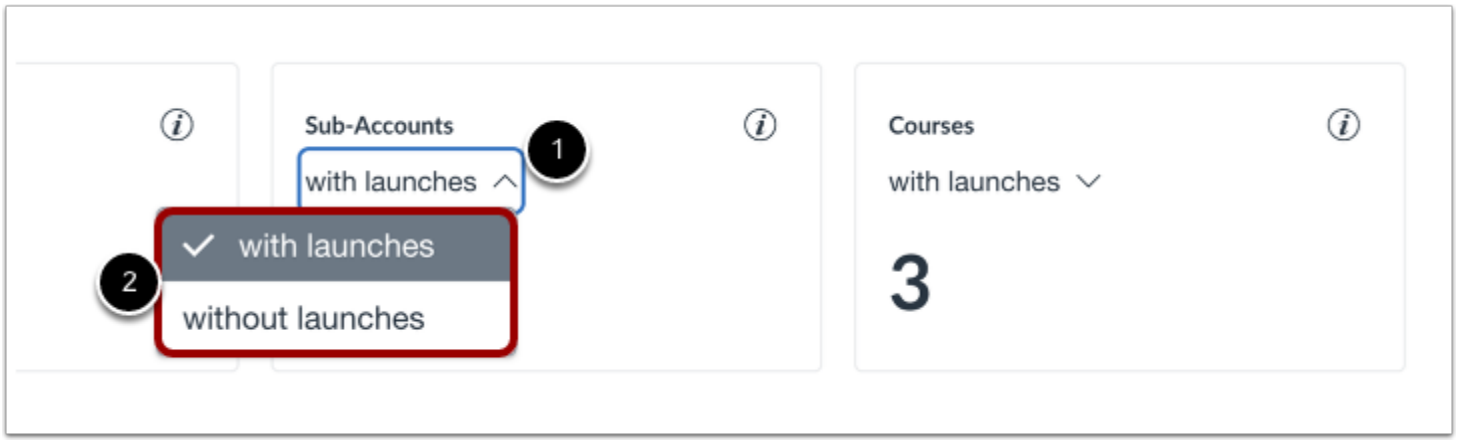
View LTI Tool Data



In the individual LTI Tool page, You can view the total launches [1], unique users [2], sub-accounts [3], courses [4], top 5 champions [5] and installed LTI versions [6].

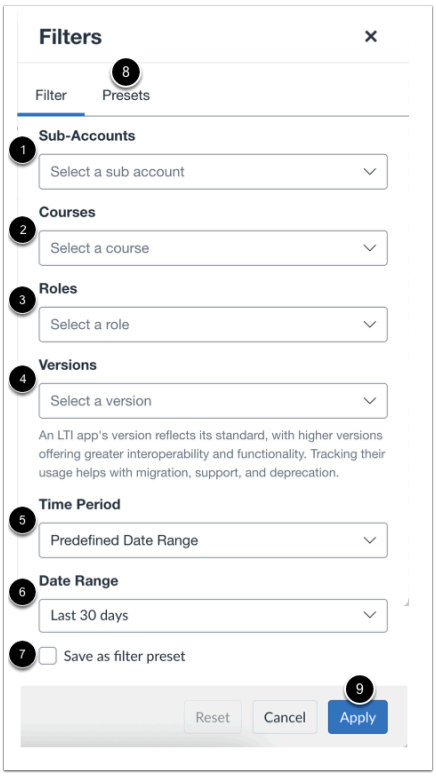
To filter the data, click the **Filter** button [7].

Open Launch Criteria



To change the launch criteria data for sub-accounts and courses, click the **Launch** drop-down menu [1]. Then select the with launches or the without launches option [2].

Apply Filters



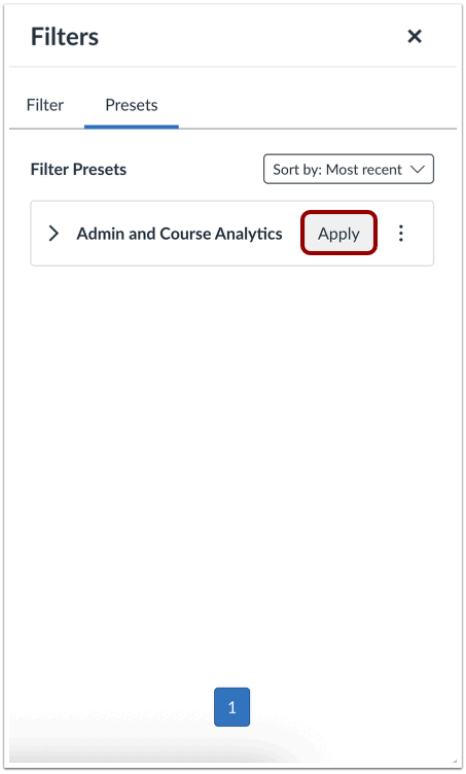
You can filter data by sub-accounts [1], courses [2], roles [3], versions [4], time period [5], and date range [6].

To save filter options as a preset, click the **Safe as filter preset** checkbox [7].

To view presets, click the **Presets** tab [8].

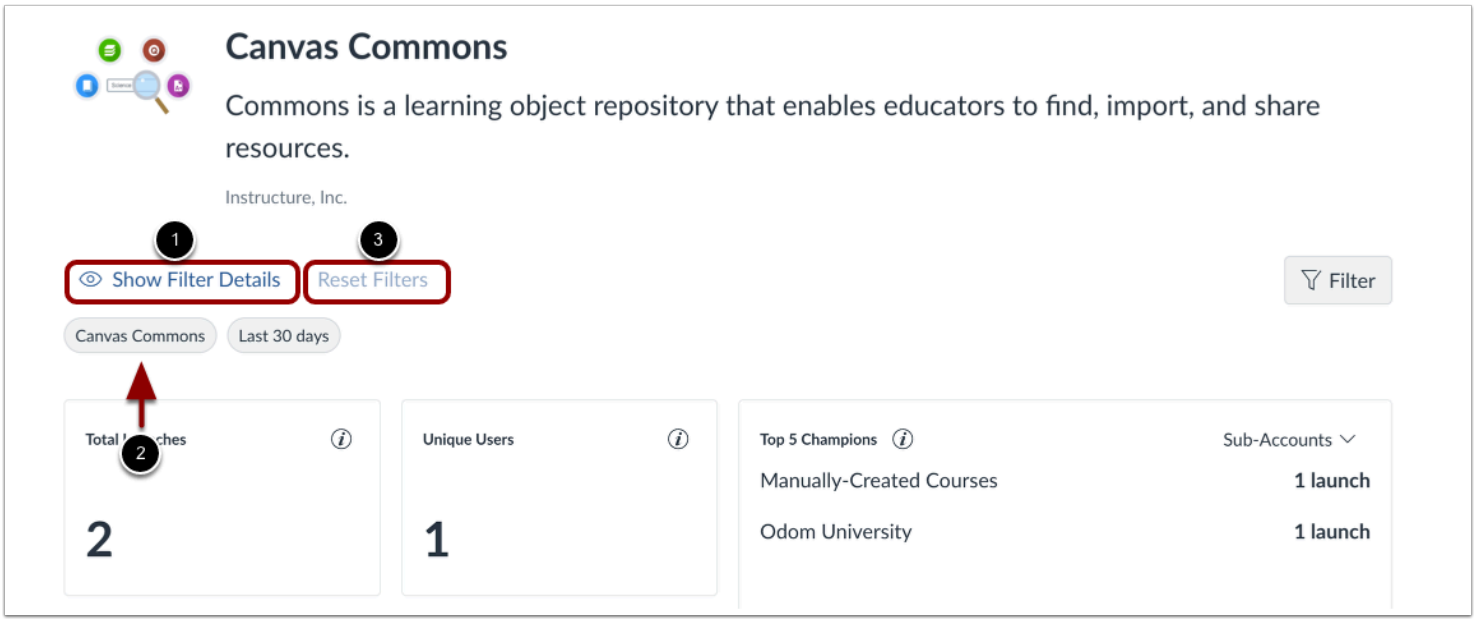
Click the **Apply Filter** button [9].

Apply Preset Filter



To apply a preset filter, locate the preset filter and click the **Apply** button.

View, Remove, or Reset Filters



To view the filter details, click the **Show Filter Details** link [1].

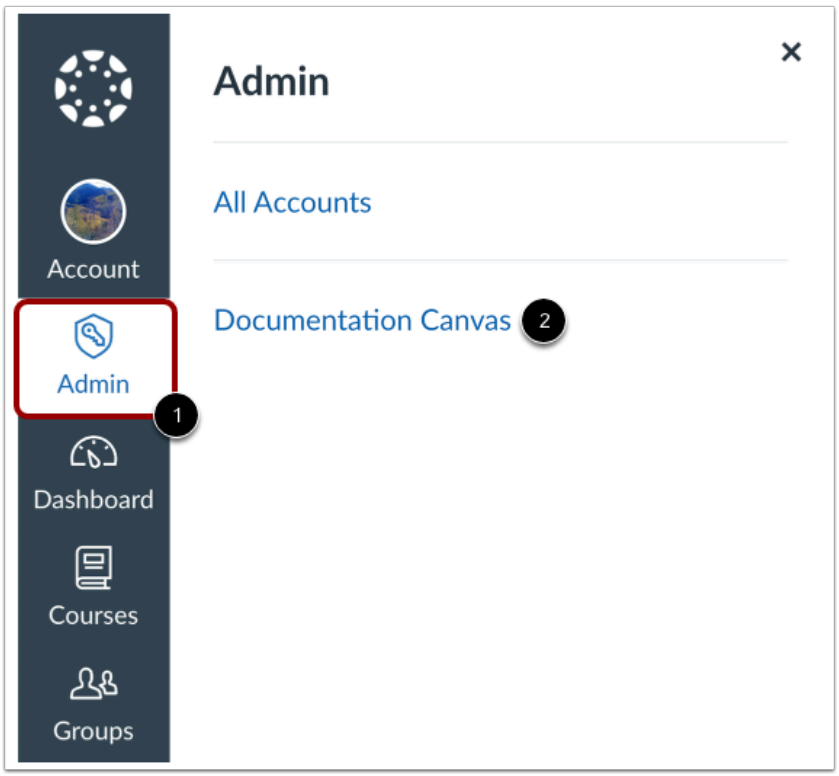
To remove a filter, click the **Delete** icon [2].

To remove all filters, click the **Reset Filters** link [3].

How do I export LTI tool data?

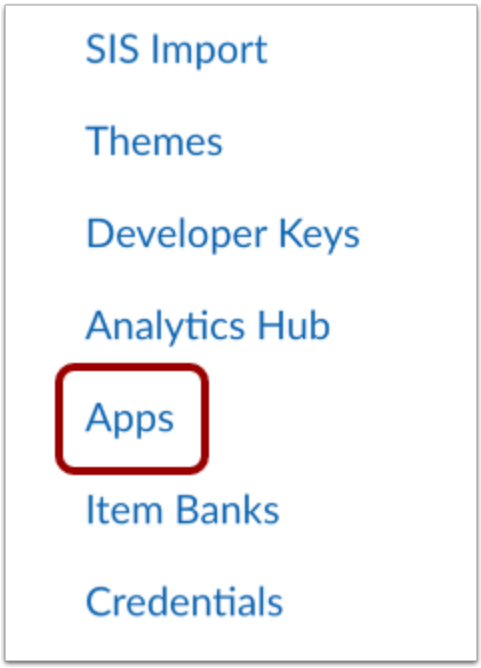
You can export LTI tool data into CSV files. A general export is available to get a complete list of all installed LTI tools. Additionally, for any individual tool listed, you can export specific reports detailing its unique users, the sub-accounts that use it, and the courses in which it has been launched by clicking on the corresponding number for each metric.

Open Account



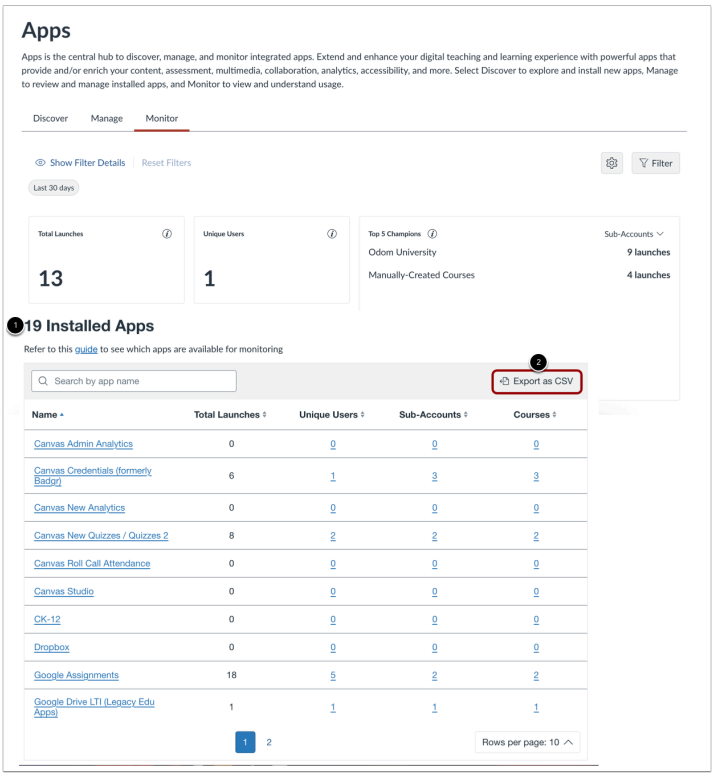
In Global Navigation, click the **Admin** link [1] and then click the name of the account [2].

Open Apps



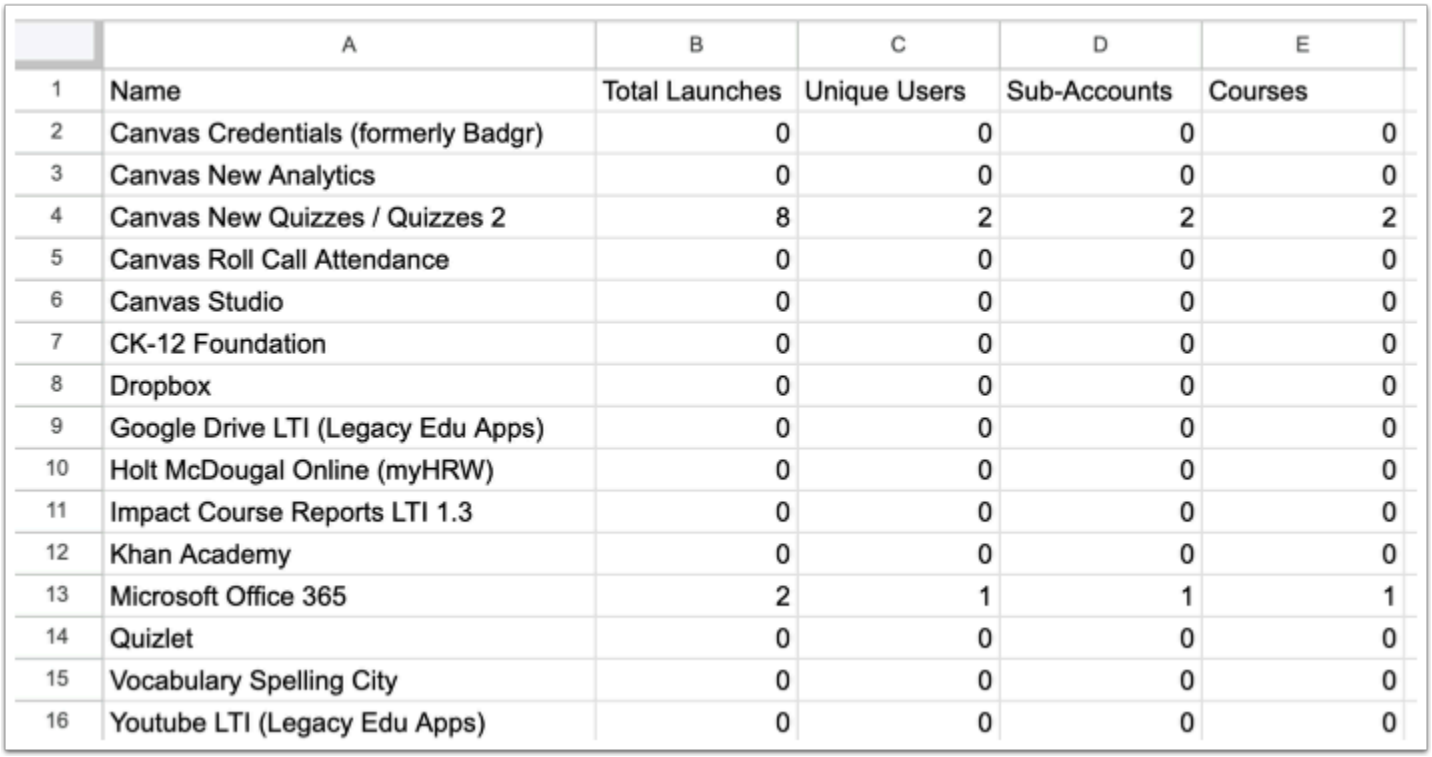
In Account Navigation, click the **Apps** link.

Export Installed App Data



In the Apps page, navigate to the Installed Tools list [1] and then click the **Export as CSV** button [2].

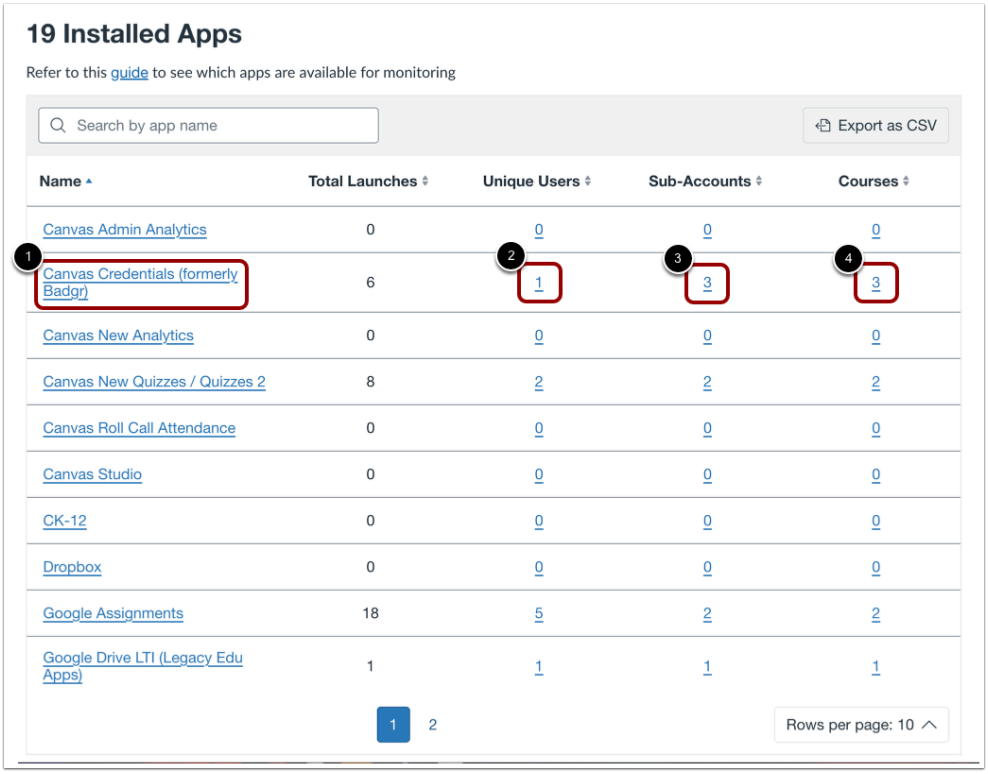
View Exported Installed Apps CSV



	A	B	C	D	E
1	Name	Total Launches	Unique Users	Sub-Accounts	Courses
2	Canvas Credentials (formerly Badgr)	0	0	0	0
3	Canvas New Analytics	0	0	0	0
4	Canvas New Quizzes / Quizzes 2	8	2	2	2
5	Canvas Roll Call Attendance	0	0	0	0
6	Canvas Studio	0	0	0	0
7	CK-12 Foundation	0	0	0	0
8	Dropbox	0	0	0	0
9	Google Drive LTI (Legacy Edu Apps)	0	0	0	0
10	Holt McDougal Online (myHRW)	0	0	0	0
11	Impact Course Reports LTI 1.3	0	0	0	0
12	Khan Academy	0	0	0	0
13	Microsoft Office 365	2	1	1	1
14	Quizlet	0	0	0	0
15	Vocabulary Spelling City	0	0	0	0
16	Youtube LTI (Legacy Edu Apps)	0	0	0	0

The CSV includes the LTI name, total launches, unique users, sub-accounts, and courses.

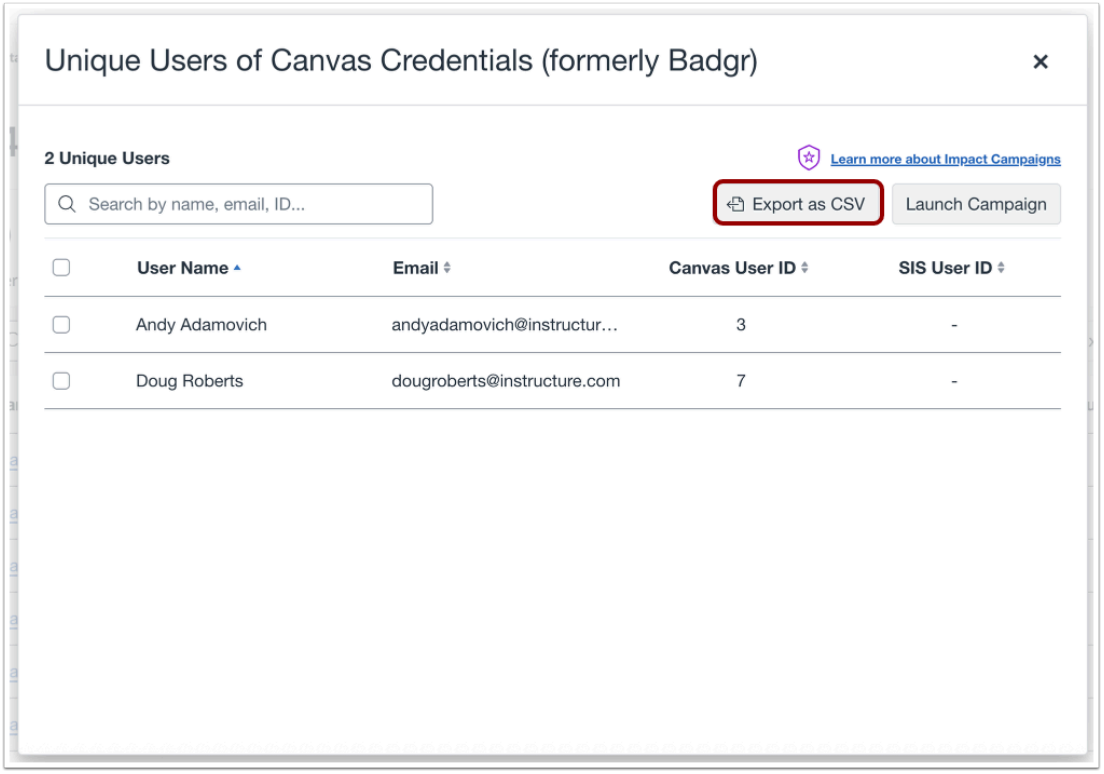
Open Individual LTI Tool Data



To export individual LTI tool data, locate the individual tool title [1].

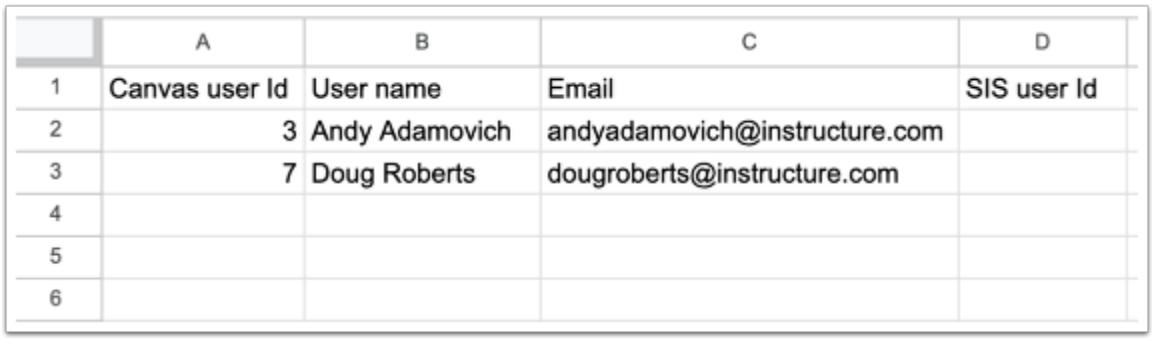
Depending on the data you want to export, click the **Unique Users** link [2], **Sub-Accounts** link [3], or **Courses** link [4].

Export Individual LTI Tool Data



Click the **Export as CSV** button.

View Exported Individual LTI Tool Data



	A	B	C	D
1	Canvas user Id	User name	Email	SIS user Id
2	3	Andy Adamovich	andyadamovich@instructure.com	
3	7	Doug Roberts	dougroberts@instructure.com	
4				
5				
6				

View the exported individual LTI tool data based on the category you exported.

Field Admin Console

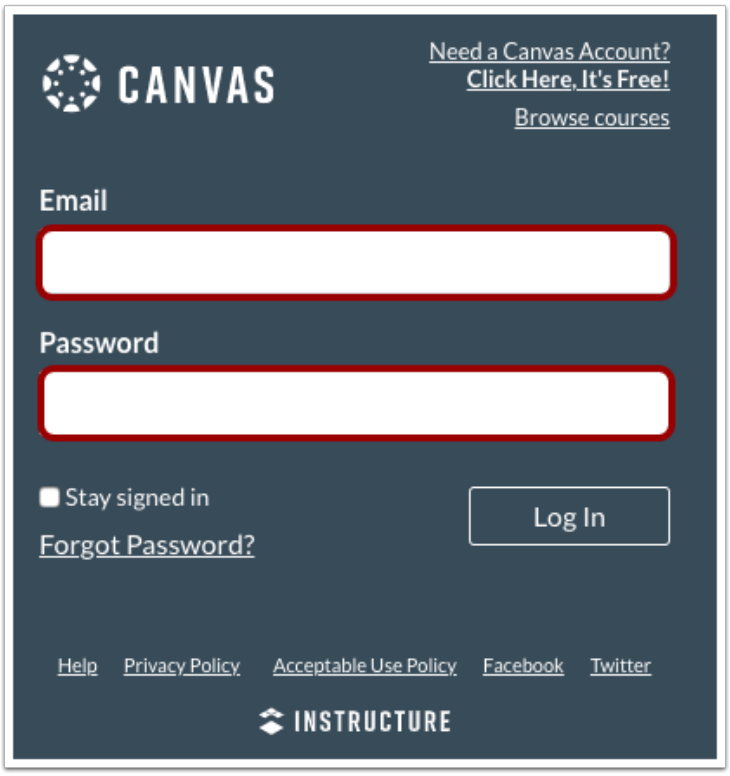
How do I log in to the Field Cloud Admin Console?

If you are an admin with the correct permissions, you can log in to the Field Admin Console and view support tickets for your institution.

If you see login errors, try the following troubleshooting steps:

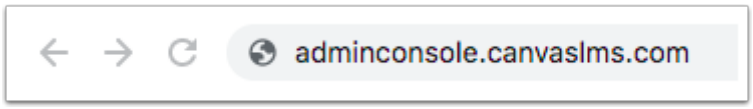
- You may need to open *adminconsole.canvaslms.com* in the same browser window where you are logged into Canvas.
- You may be logged into the wrong Canvas account. Check your URL and try again.
- You may be logged into Canvas as the wrong user. Log out of Canvas and log in as the correct user.
- You may not be setup as a Field Admin. Contact your Customer Success Manager.

Log in to Canvas



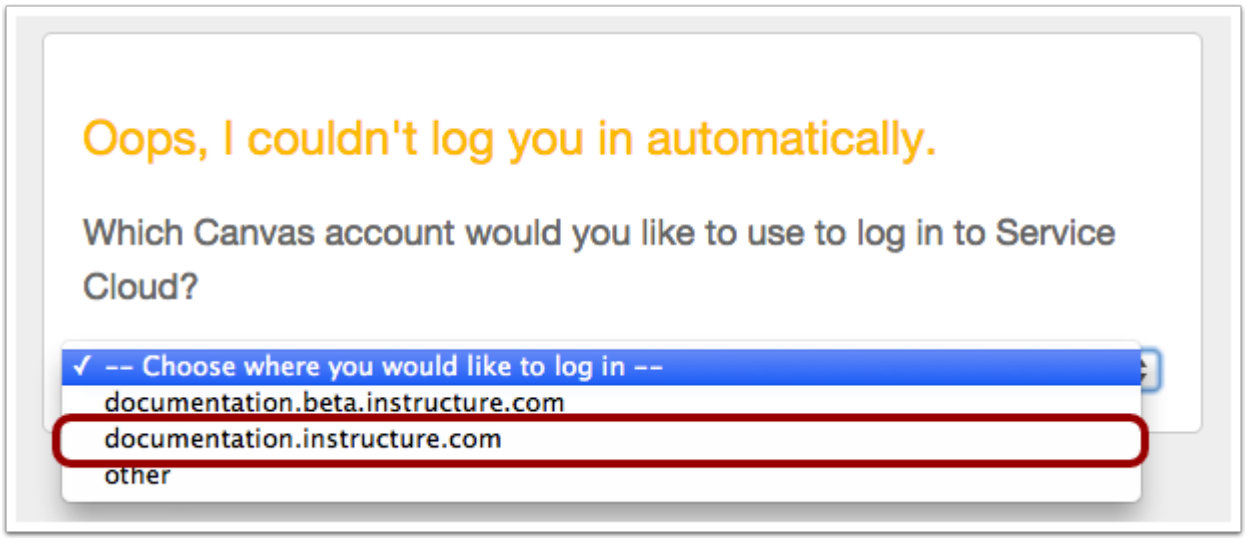
Using your institution's Canvas URL, enter your Canvas credentials and log in to your account.

Open Console



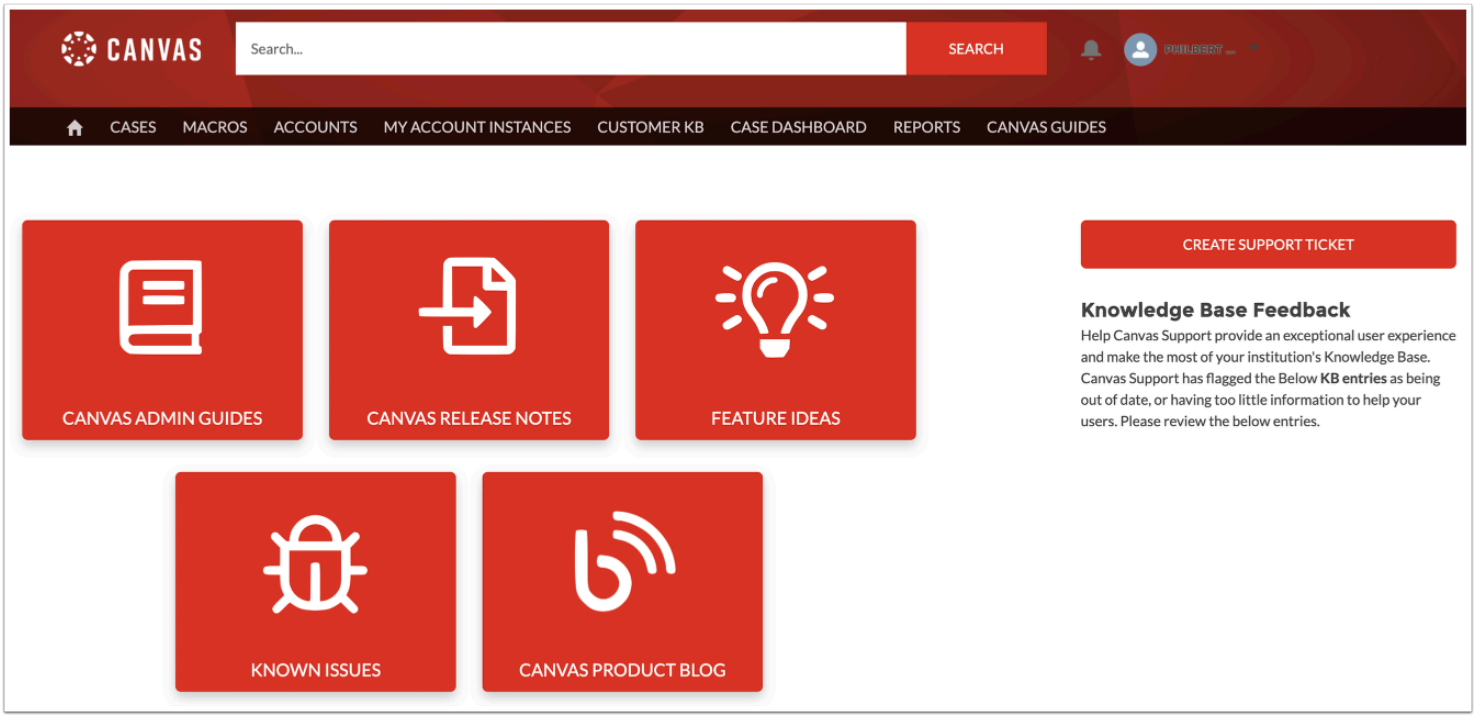
To log in to the Field Admin Console, enter *adminconsole.canvaslms.com* in the URL field in a new browser window or tab.

Select Account



If you have an account with more than one Canvas URL, you may be asked to select the account that you want to use to log in.

View Console

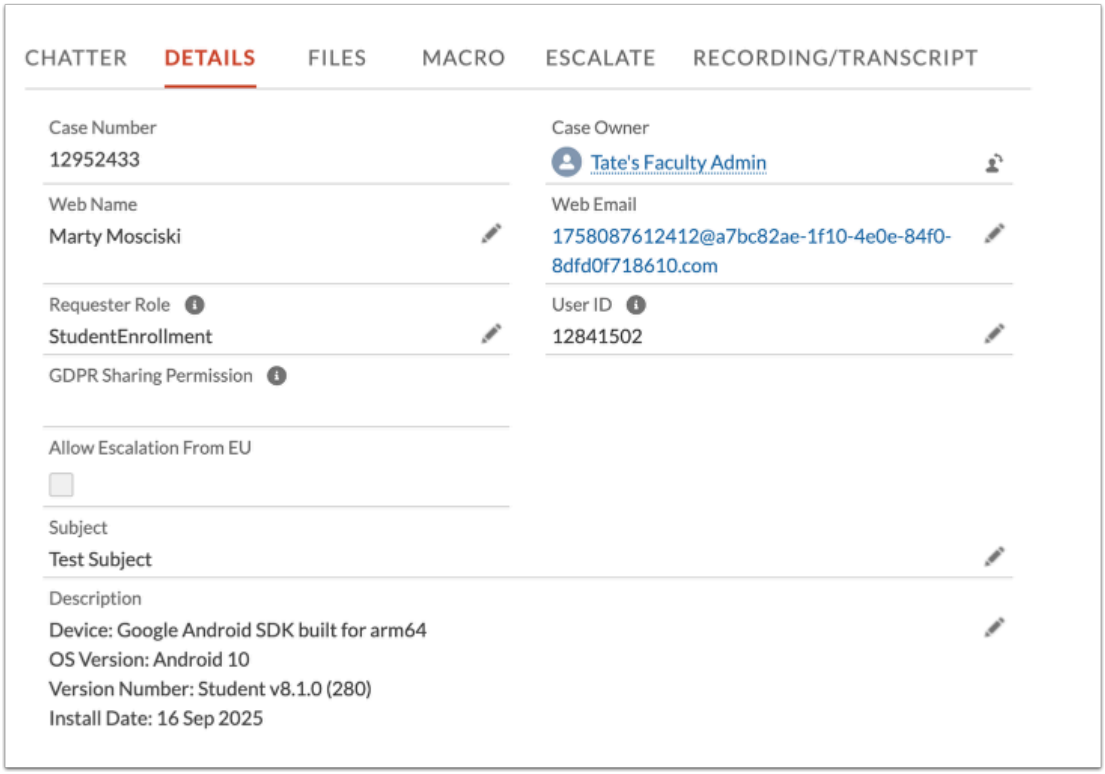


View the Field Admin Console for your account. Learn how to use the Field Admin Console.

What are the different case roles in the Field Admin Console?

The Field Admin Console includes five common case roles: Requester, Owner, Contact, CC, and Case Team. Modifications for Requester and CC roles are detailed in this lesson.

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 and User's Email.

Requesters can be modified by updating the Web Email field of a case.

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



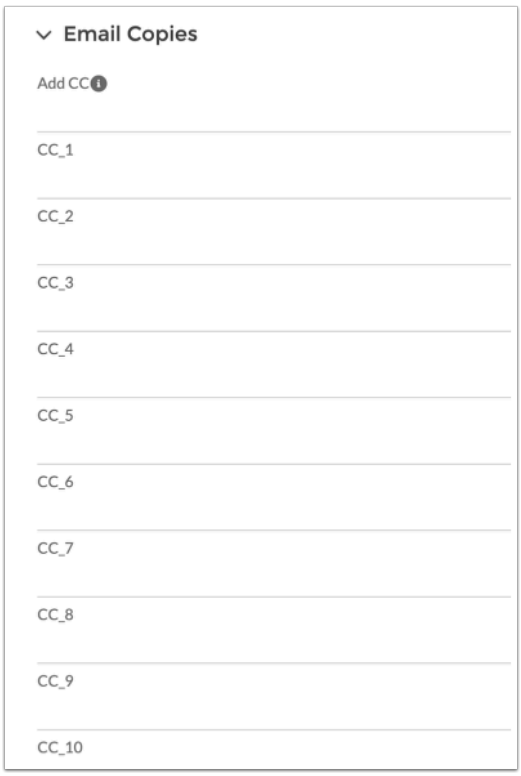
The Owner is the individual who has responsibility for the case. Owners can transfer cases to other Field Admins or escalate them to the Instructure Support Team.

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)

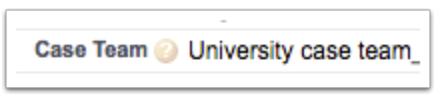


Carbon Copy (CC) is an individual who is added to a case to receive notifications on the progress of a specific case. Multiple individuals can be added as a CC but must be added on a case-by-case basis. CCs can be added to a case using the Add CC field within a case.

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



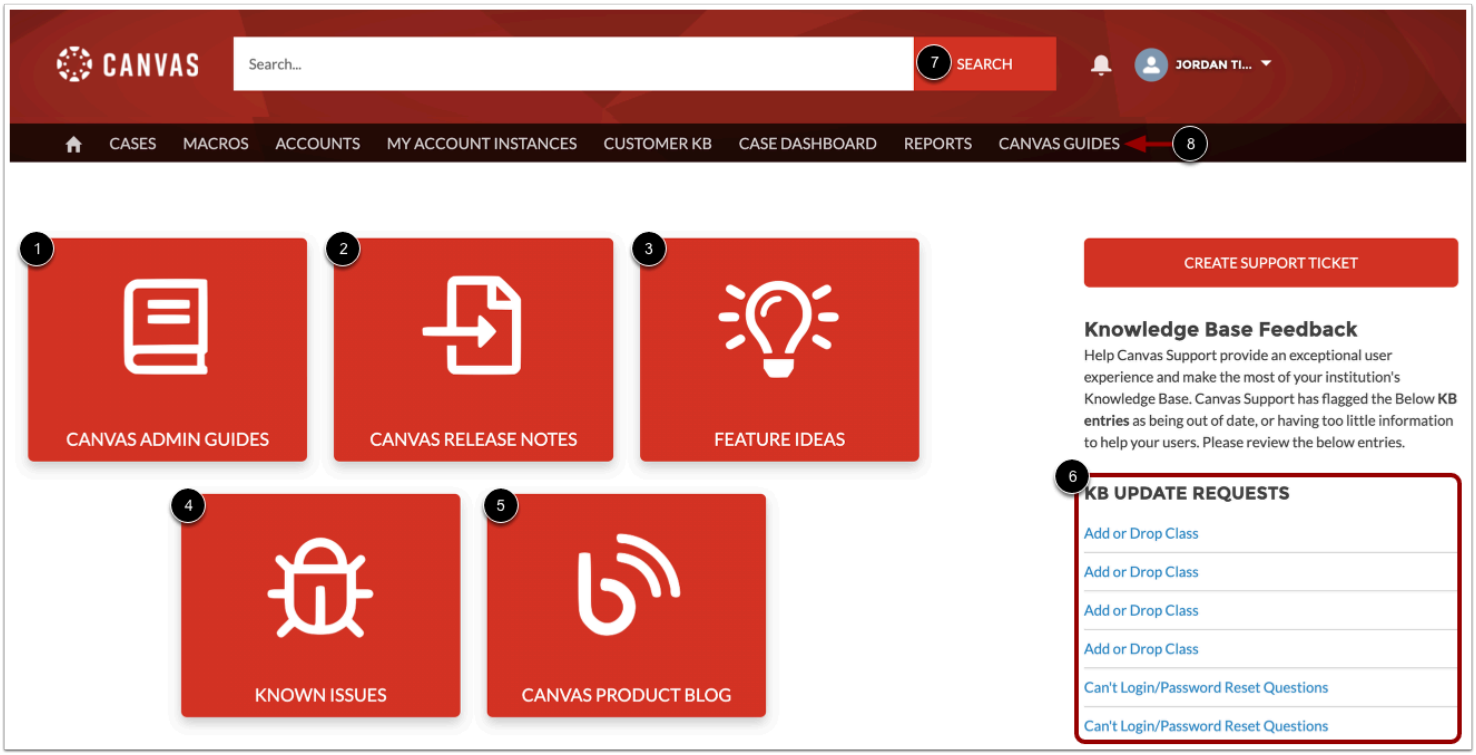
The Case Team includes Account contacts and Field Admins who will receive notifications for all cases within an account.

How do I use the Field Admin Console?

Once you have logged in, you can use the Field Admin Console to effectively manage cases and customer knowledge bases (KBs) for your accounts. You can also edit your profile information.

Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

View Field Admin Console



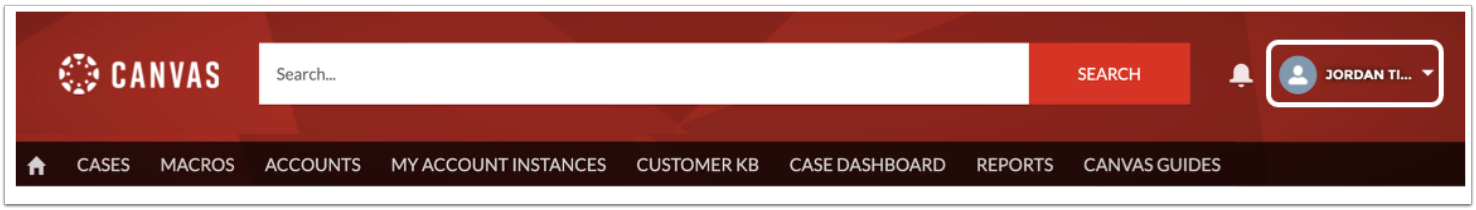
The Field Admin Console opens to the home page. You can use the buttons displayed in the home page to view the Canvas Admin Guide [1], Canvas release notes [2], idea conversations [3], known issues [4], and product blogs [5].

The Home page also displays outstanding knowledge base (KB) update requests in the **KB Update Requests** list [6].

To search the interface, enter your search terms in the field and click the **Search** button [7].

To view the Canvas Guides, click the **Canvas Guides** link [8].

Open User Menu



To open your User Menu, click your username.

View User Menu

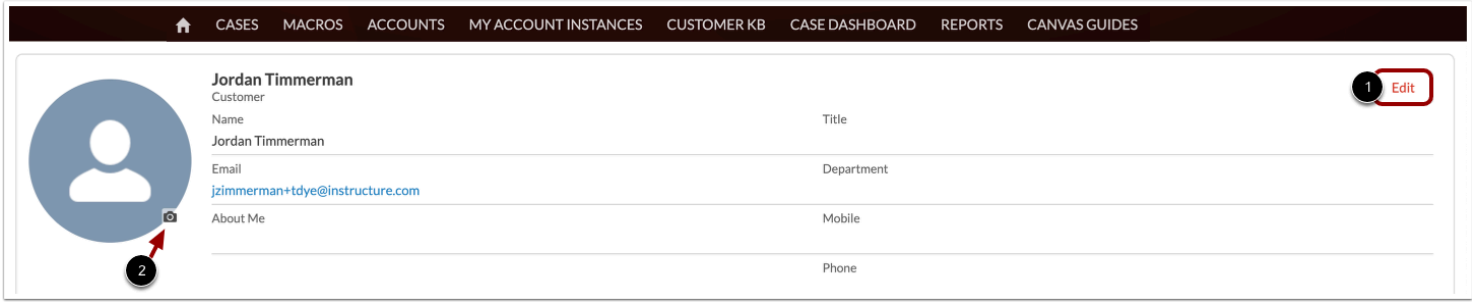


From the User Menu, you can:

- Return to the home page [1]
- View your profile [2]
- Manage settings [3]
- View your account [4]

- Create a new case [5]
- Logout of the console [6]

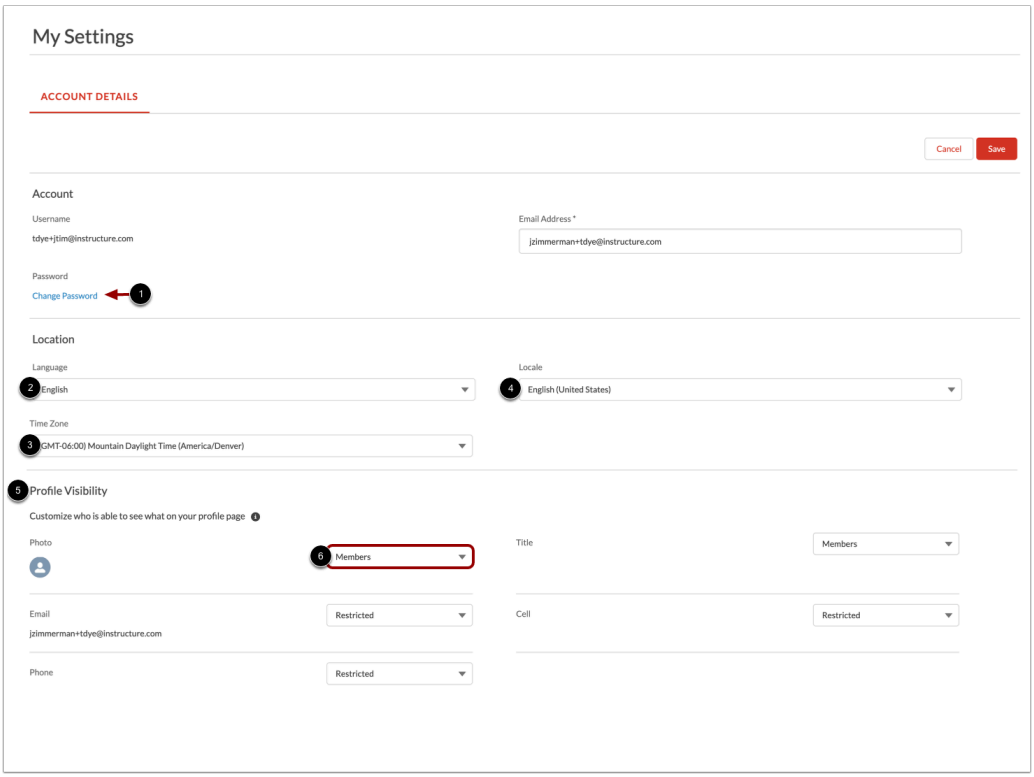
View Profile



From your profile, you can view and edit profile information, including name, email, title, department, and contact information. To edit your profile, click the **Edit** button [1].

To edit your profile picture, click the **Photo** icon [2].

View Settings



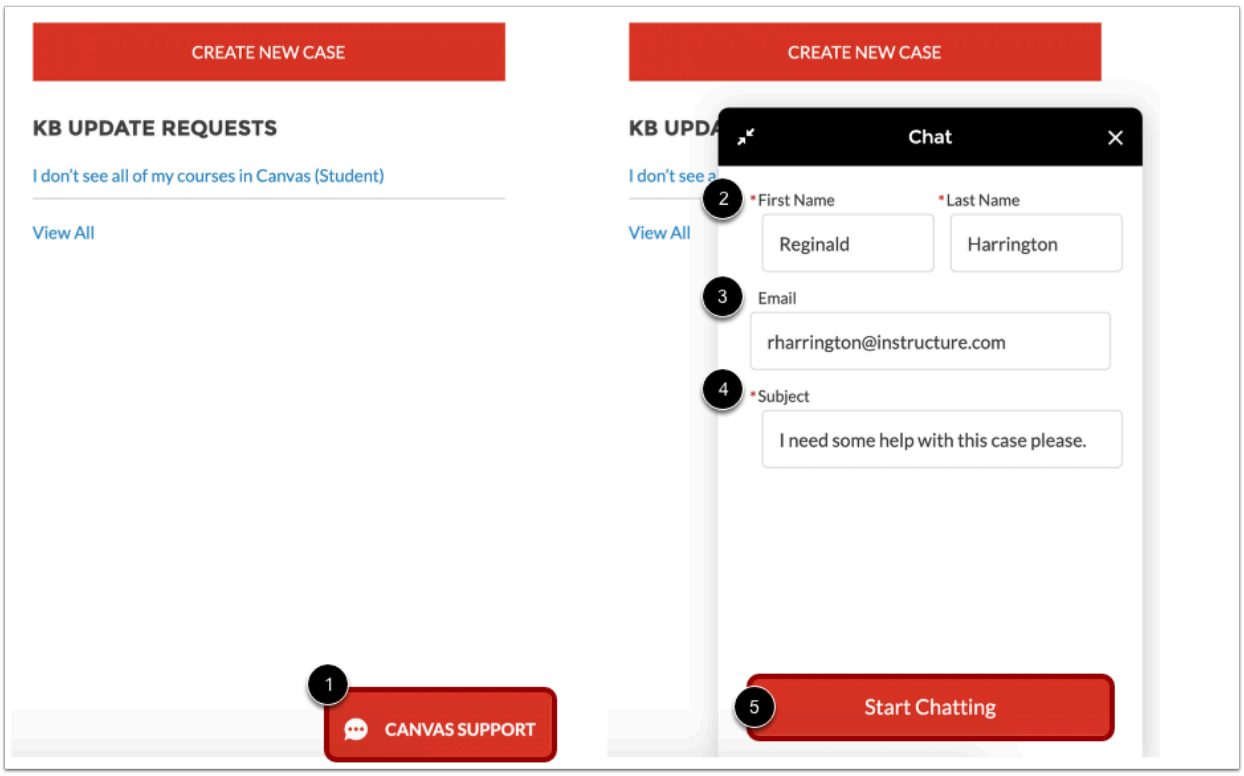
From the Settings page, you can manage your password, language, timezone, locale and profile visibility.

To change your password, click the **Change Password** link [1].

To change your language, click the **Language** field [2]. To change your timezone, click the **Timezone** field [3]. To change your locale, click the **Locale** field [4].

In the **Profile Visibility** settings [5], you can manage who is able to see the information on your profile page. To customize visibility, click the drop-down menu that corresponds to your profile information [6]. Then select if the information is public, restricted to users who are logged in, or limited to members who created an account.

View Chat

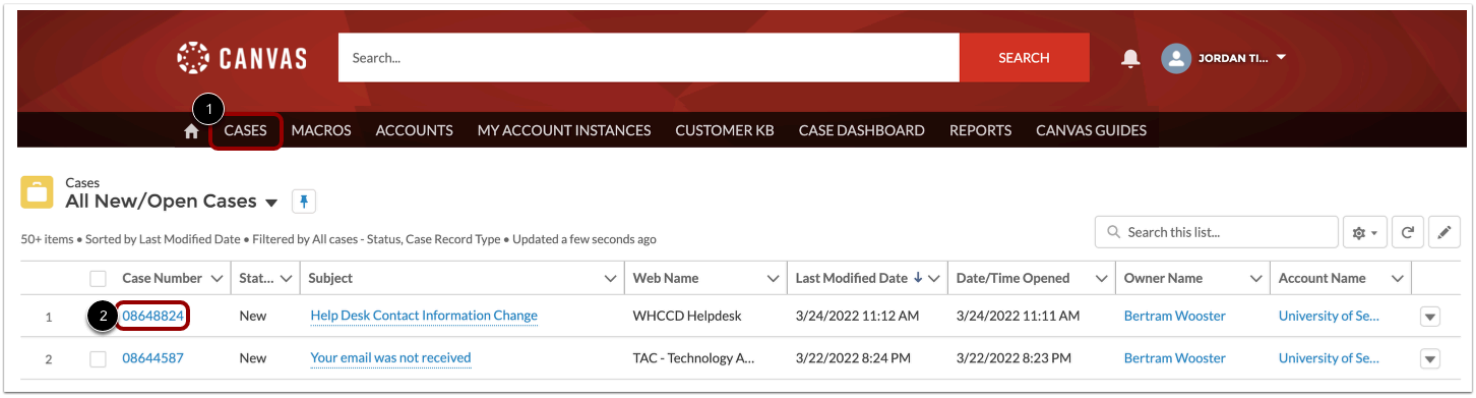


If your institution has Tier 1 or 24x7 support, you may be able to chat with a Canvas Support agent from the home page.

To open the chat window, click the **Canvas Support** button [1].

Then enter your name [2], email [3], and the chat subject [4]. To begin your chat, click the Start Chatting button [5].

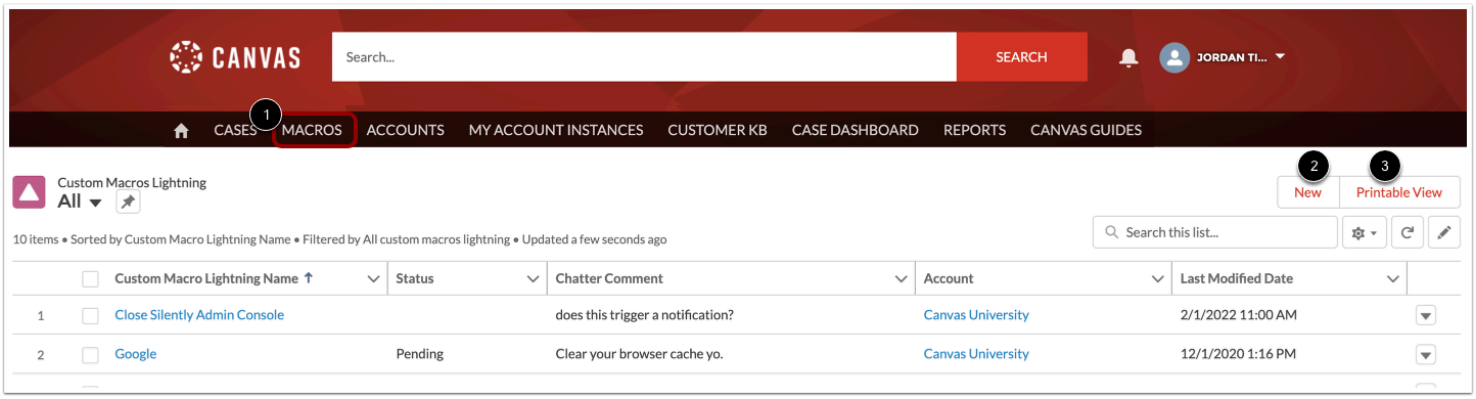
View Cases



To view your cases, click the **Cases** tab [1]. From the Cases page, you can manage cases in your account.

To view an individual case, click the case number [2].

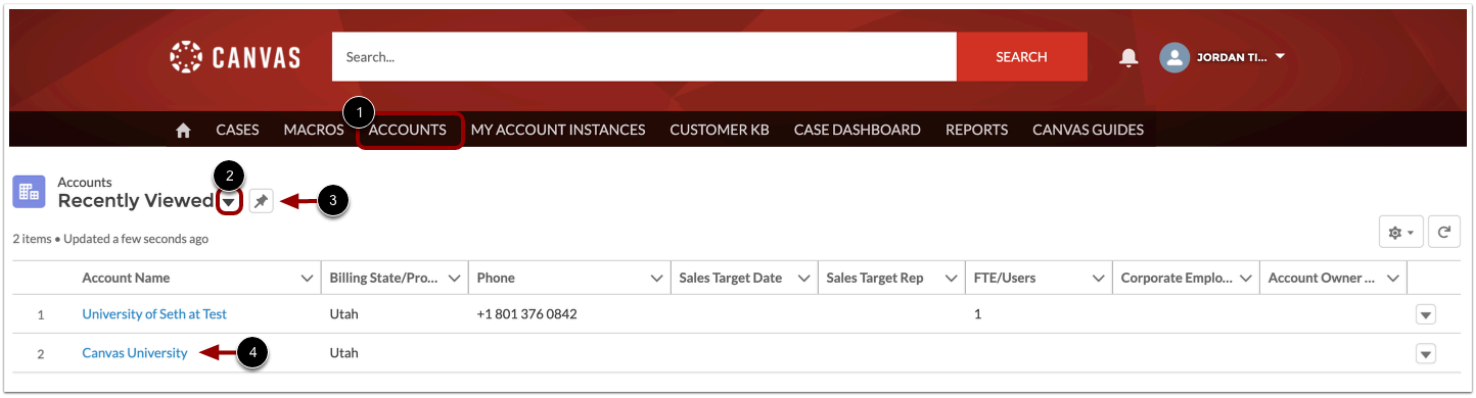
View Macros



To view your account macros, click the **Macros** tab [1]. Macros allow field admins to create a list of changes that can be applied to cases in a single click.

To create a new macro, click the **New** button [2]. To print your macros, click the **Printable View** button [3].

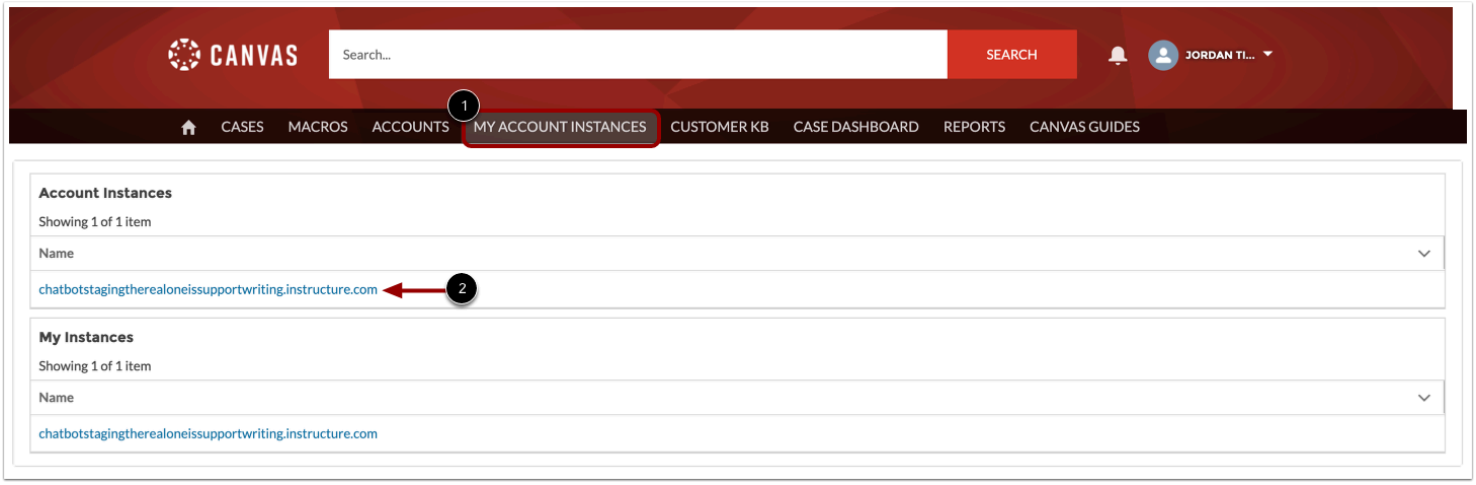
View Accounts



To view your accounts, click the **Accounts** tab [1]. By default, the Accounts page will display all accounts that you are authorized to view. To filter the accounts that display on the page, click the **Filter** icon [2]. To pin an account filter as the default view, click the **Pin** icon [3].

To view information for an account, click the name of the account [4].

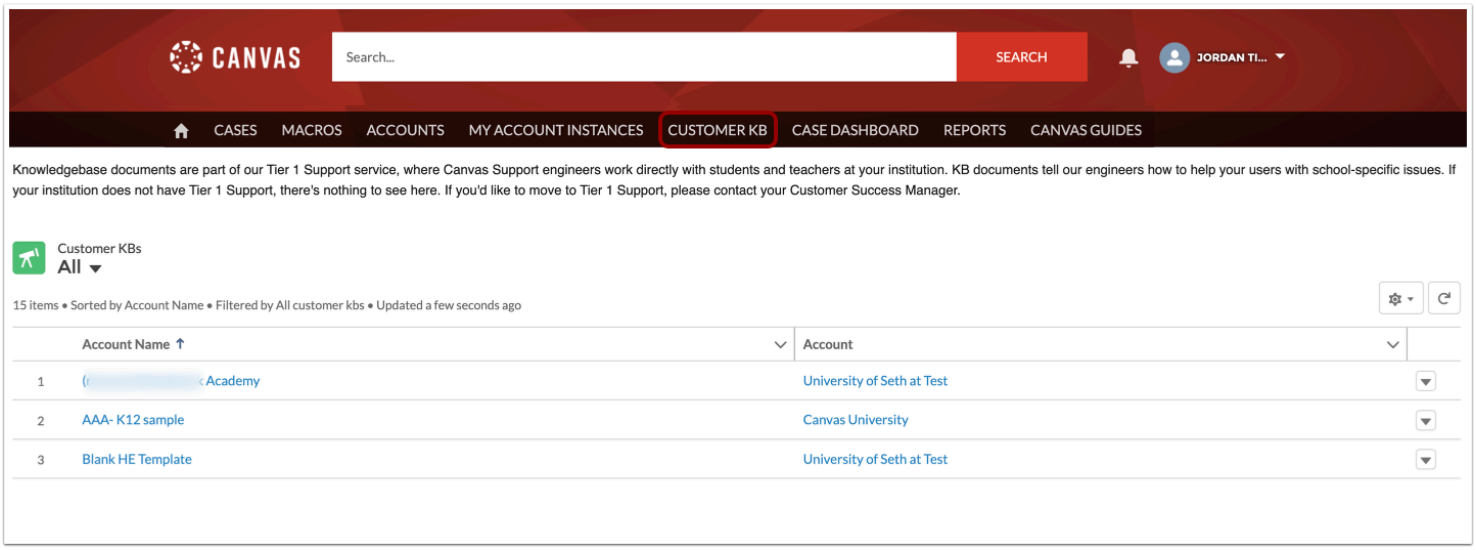
View My Account Instances



To view your account instances, click the **My Account Instances** tab [1]. By default, the My Account Instances page displays all account instances you are authorized to view.

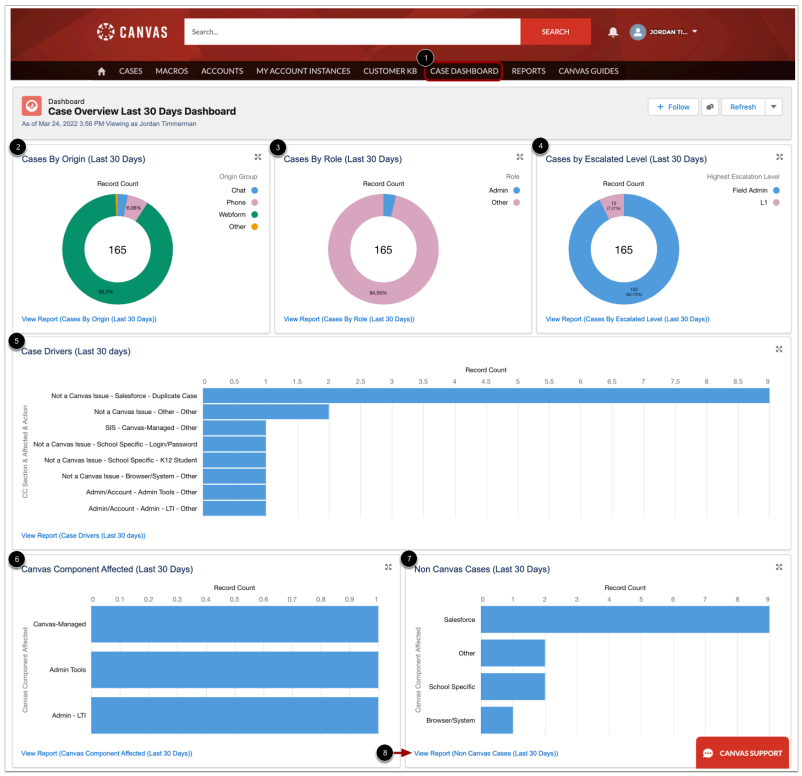
To view information for an instance, click the instance name [2].

View Customer KBs



To view customer KBs for your accounts, click the **Customer KB** tab.

View Case Dashboard



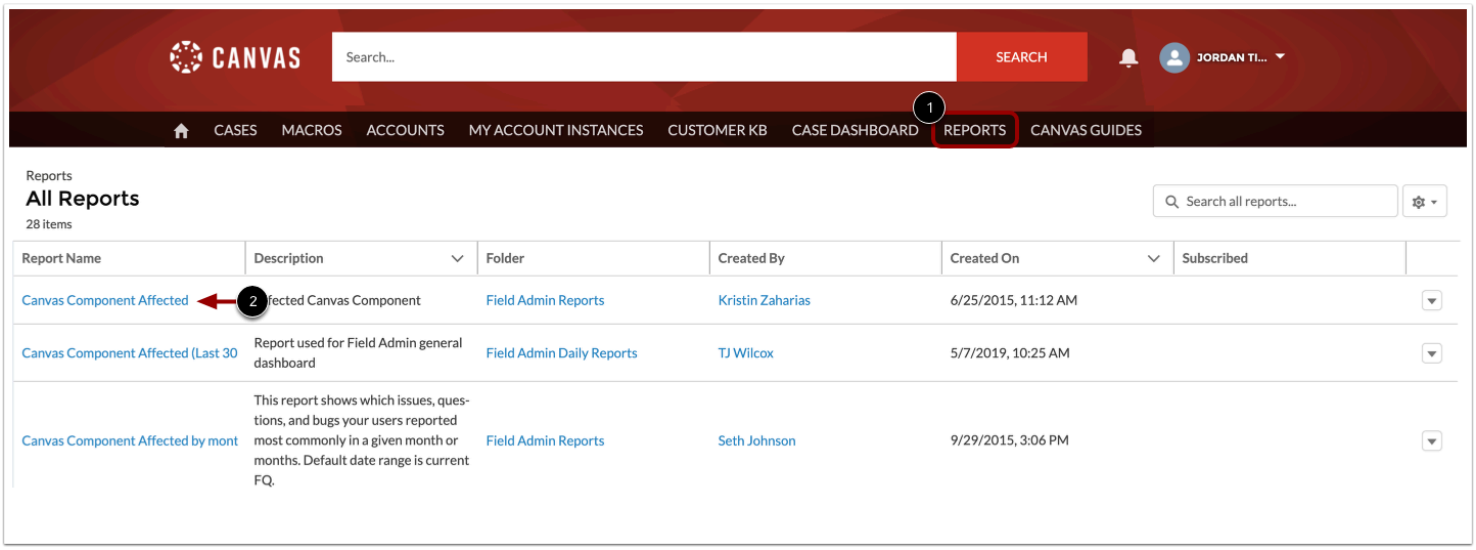
To view your Case Dashboard, click the **Case Dashboard** tab [1].

From the Case Dashboard, you can view donut charts for case origin [2], case role [3], escalated level [4], case drivers [5], Canvas component affected [6], and non Canvas cases [7].

To view detailed reports for a dashboard item, click the **View Report** link [8].

To learn more about options available for the Canvas Components fields, view the Canvas Component resource document.

View Reports



To view case reports in a list view, click the **Reports** tab [1].

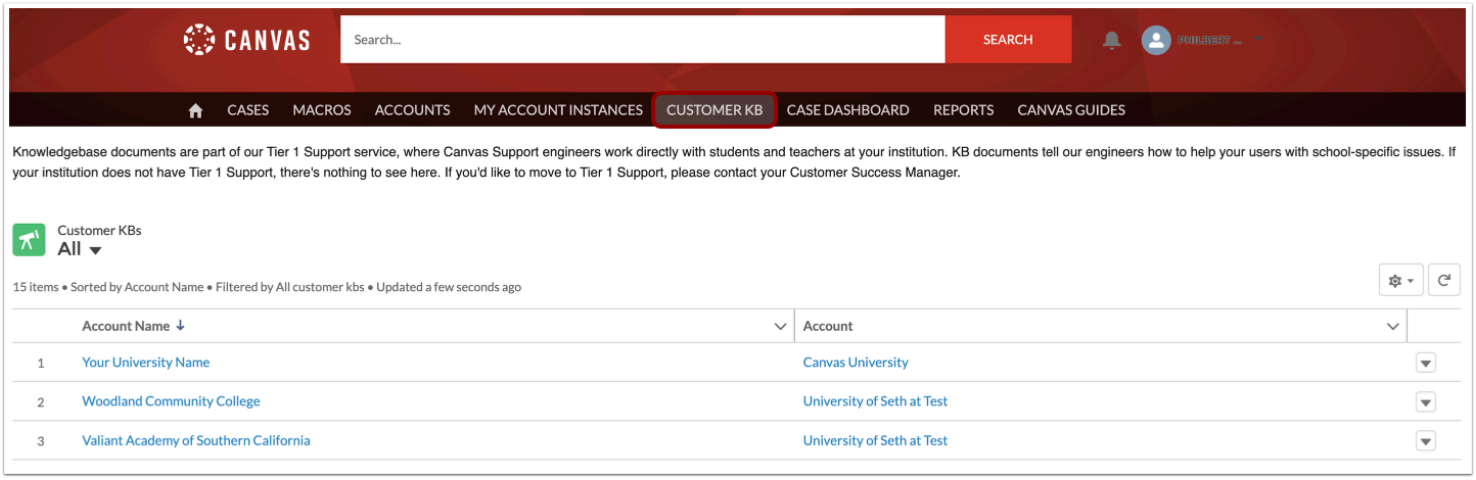
To view a report, click the name of the report [2].

How do I view my customer KB in the Field Admin Console?

As a field admin, you can view and edit your customer knowledge base (KB) from the Field Admin Console. Customer KBs allow you to share institution-specific details that help agents assist users with support cases.

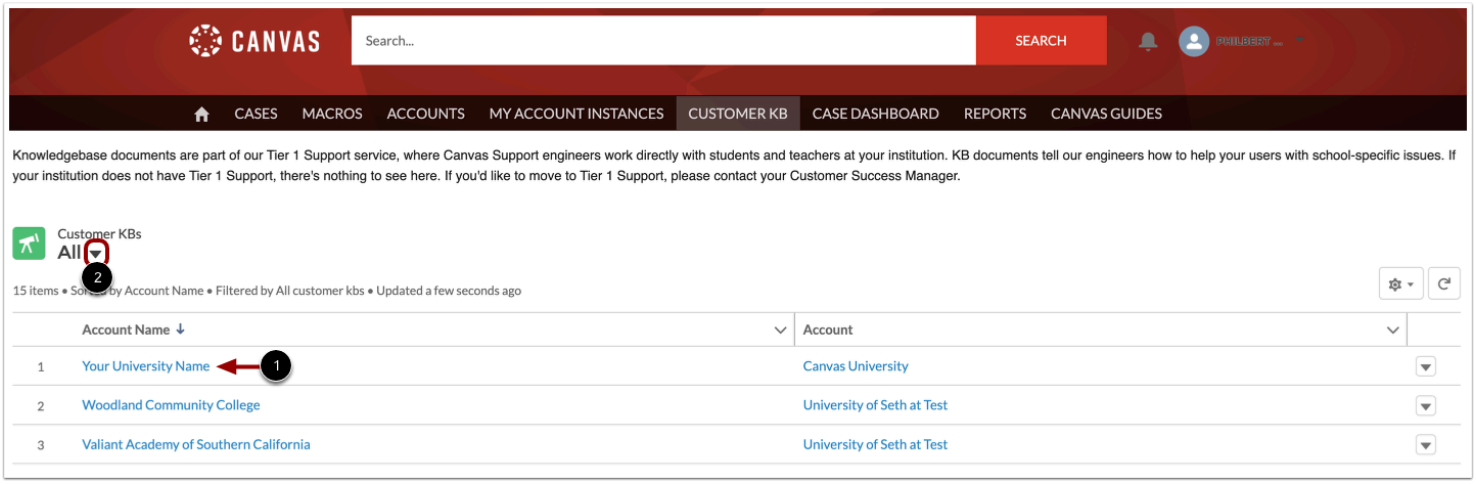
Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Open Customer KBs



From the Field Admin Console home page, click the **Customer KB** tab.

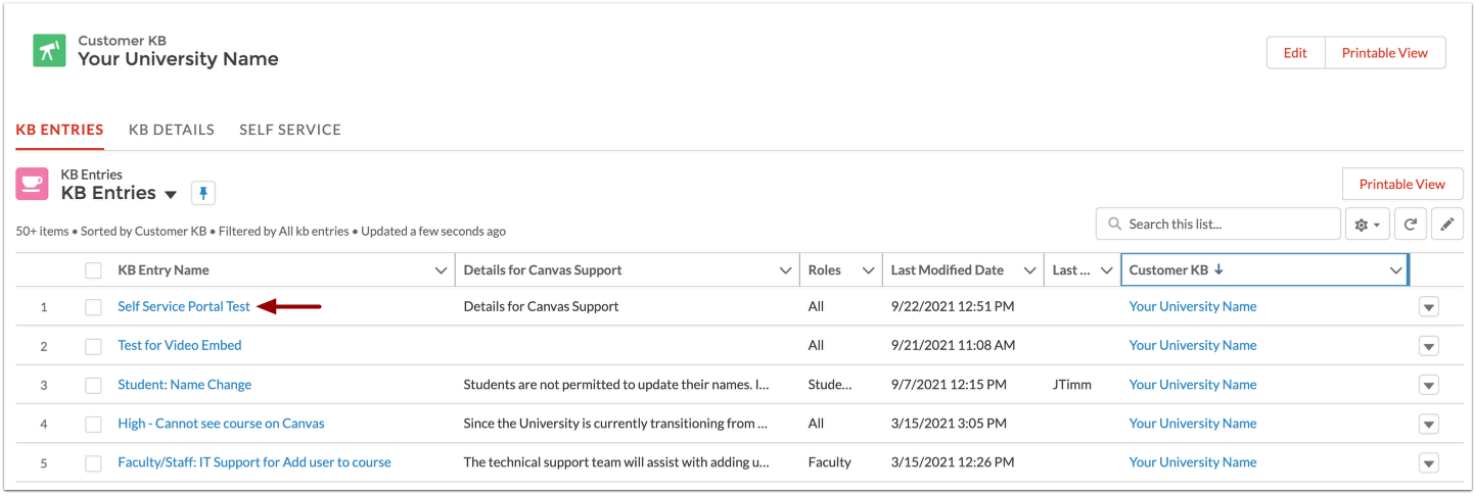
Open Account KB



Click the name of the account that includes the KBs you want to view [1].

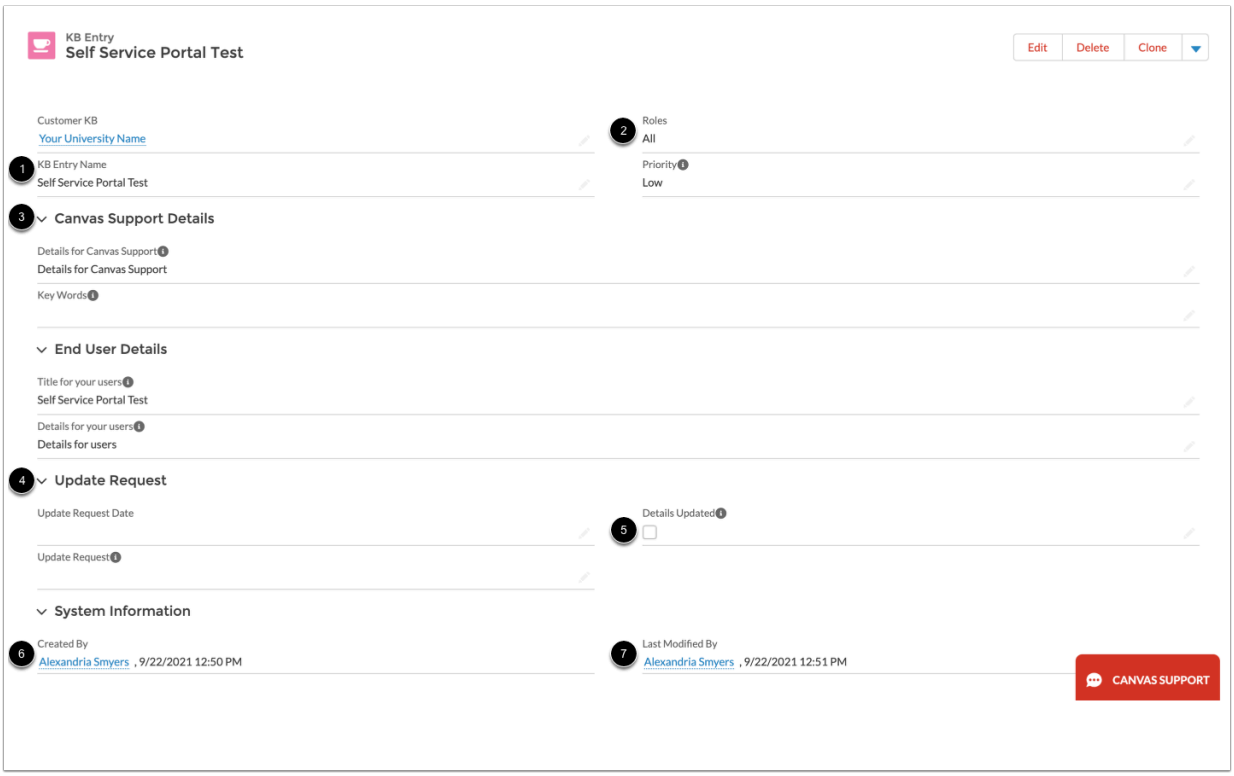
To filter the accounts that display on the page, click the **Filter** icon [2].

View KB Entries



To view details for an entry, click the name of the entry.

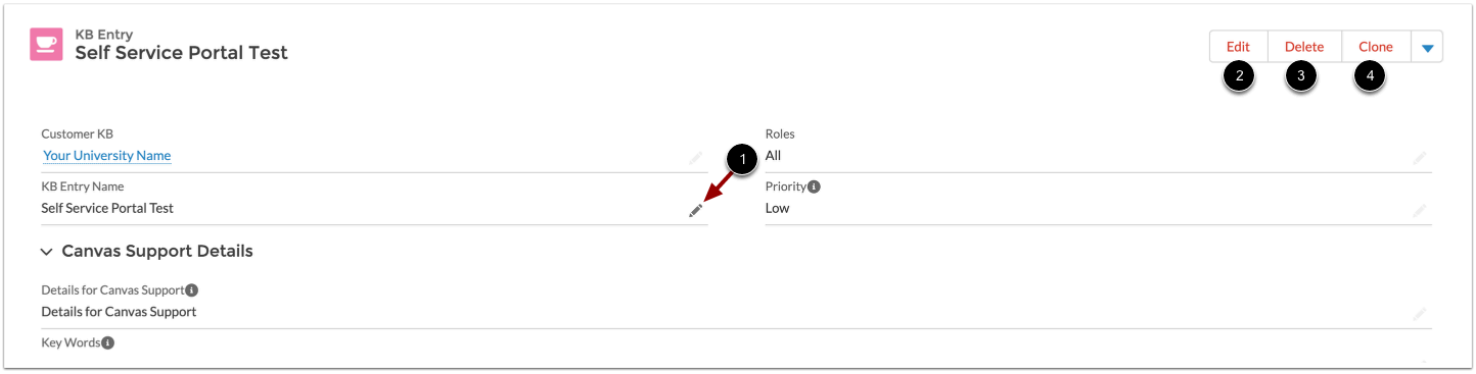
View Entry Details



Each KB entry contains the following details:

- Entry name [1]
- Affected roles [2]
- Default case handling [3]: provides additional details, text, and keywords that support agents can use when handling a case related to the entry
- Update request [4]: includes any details that should be added to the entry. When these updates are addressed, click the **Details Updated** checkbox [5].
- User who created the entry [6]
- User who last modified the entry [7]

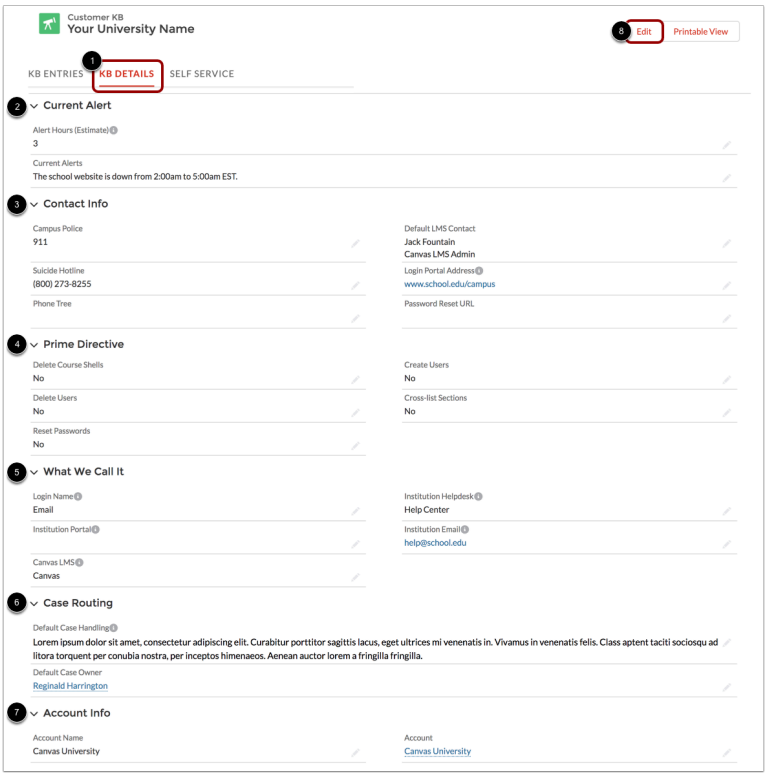
Edit Entry



To edit an entry field, click the **Edit** icon [1].

To edit an entire KB entry, click the **Edit** button [2]. To delete a KB entry, click the **Delete** button [3]. To clone a KB entry, click the **Clone** button [4].

View KB Details



To view the details for your customer KB, click the Details tab [1]. Details include alerts [2], contact information [3], prime directives [4], account terminology [5], case routing [6], and account information [7].

To edit the KB details, click the **Edit** icon [8].

How do I edit a KB entry in the Field Admin Console?

As a field admin, you can edit an entry in your customer knowledge base (KB). Customer KBs allow institutions to share institution-specific information with agents that accept support cases from their users.

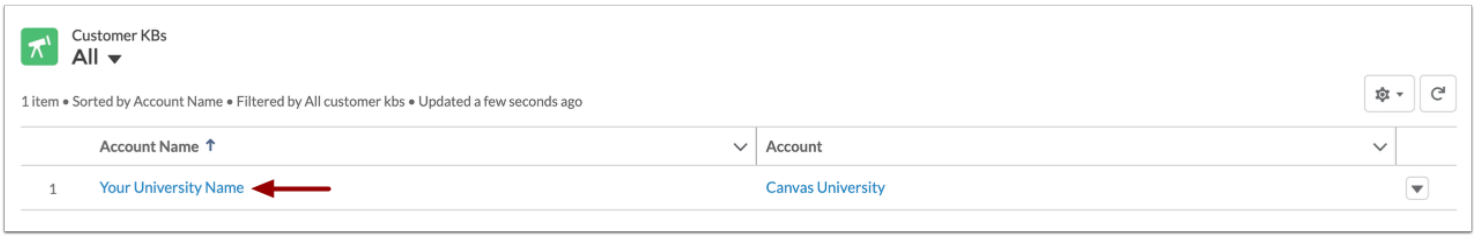
Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Open Customer KB



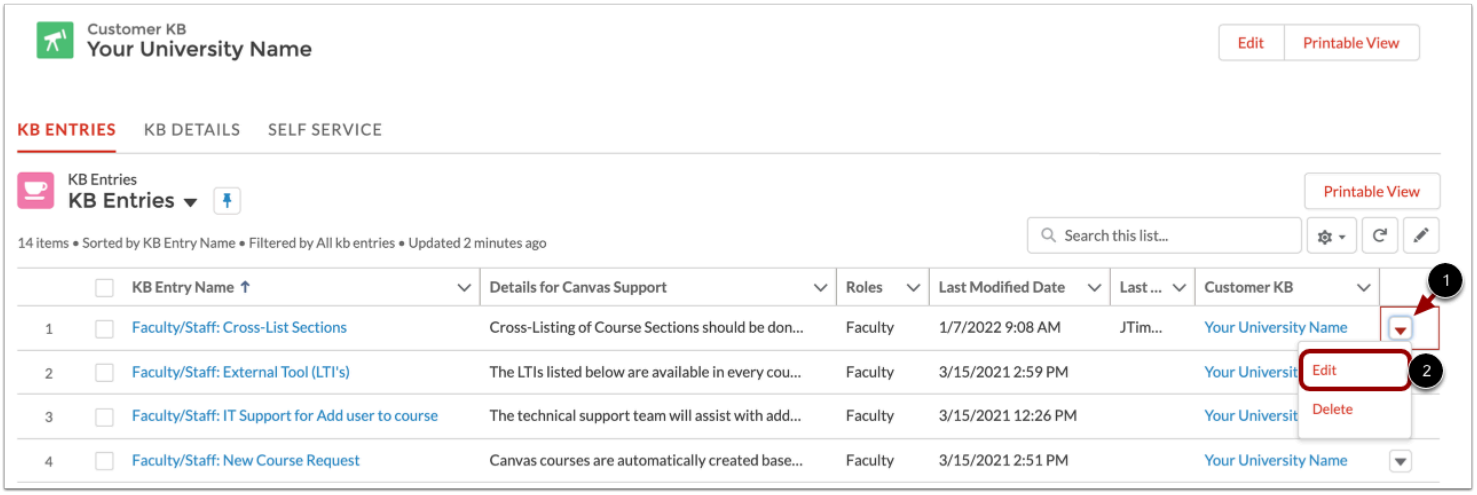
Click the **Customer KB** tab.

Open Account KB



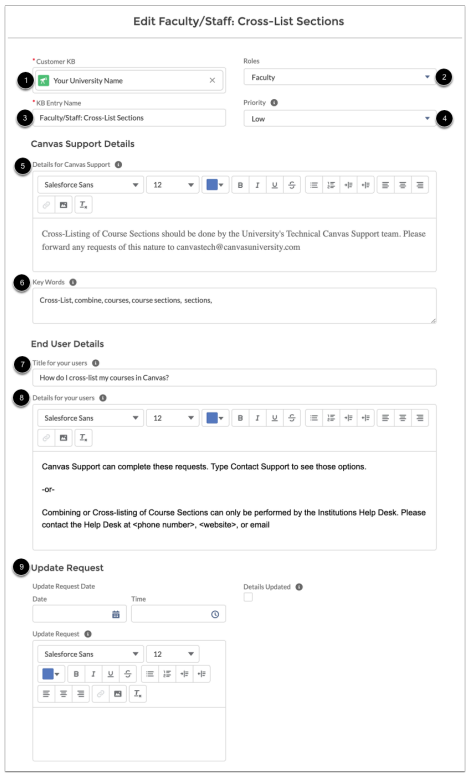
Click the name of the account you want to view.

Open Entry



To edit an existing KB entry, click the entry's **Options** icon [1], then click the **Edit** link [2].

Edit Entry Details



A modal displays in which you can edit the KB entry.

You can edit the Customer KB in which the entry is located [1], roles affected by the entry [2], the entry name [3], and the entry's priority [4].

You can also manage information included in the entry such as details for Canvas Support [5], key words [6], the title for your users [7], and details for your users [8].

Lastly, you can view and manage any update requests added by Canvas Support for the entry [9].

Save Entry



To save your changes to the KB entry, click the **Save** button [1].

To save this KB entry and create a new KB entry, click the **Save & New** button [2].

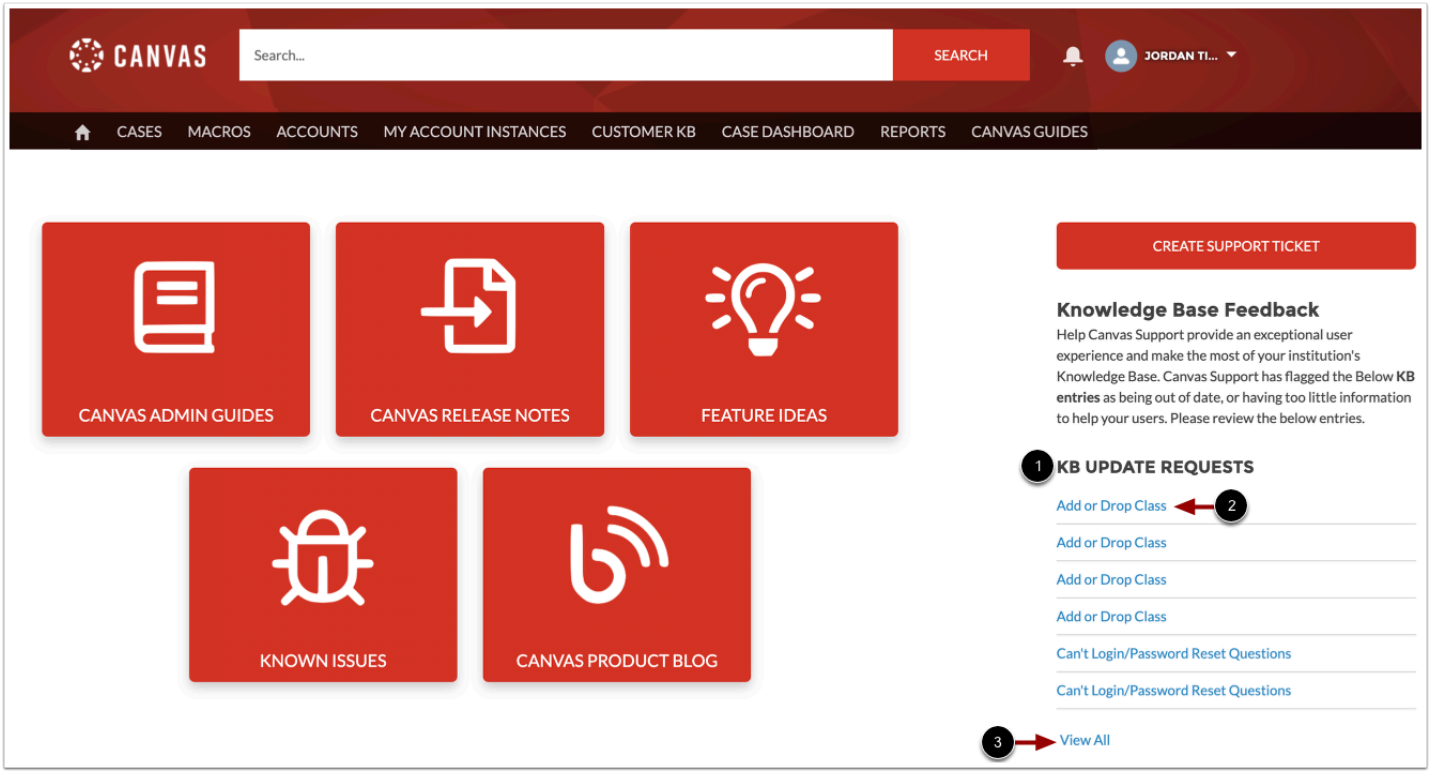
To exit the modal without saving changes, click the **Cancel** button [3].

How do I manage KB update requests in the Field Admin Console?

Canvas support agents can request updates to an entry in your institution's knowledge base (KB) through the Field Admin Console. Update requests display on the Admin Console home page. You can view update requests, make changes, and remove the entry from your list of updates.

Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

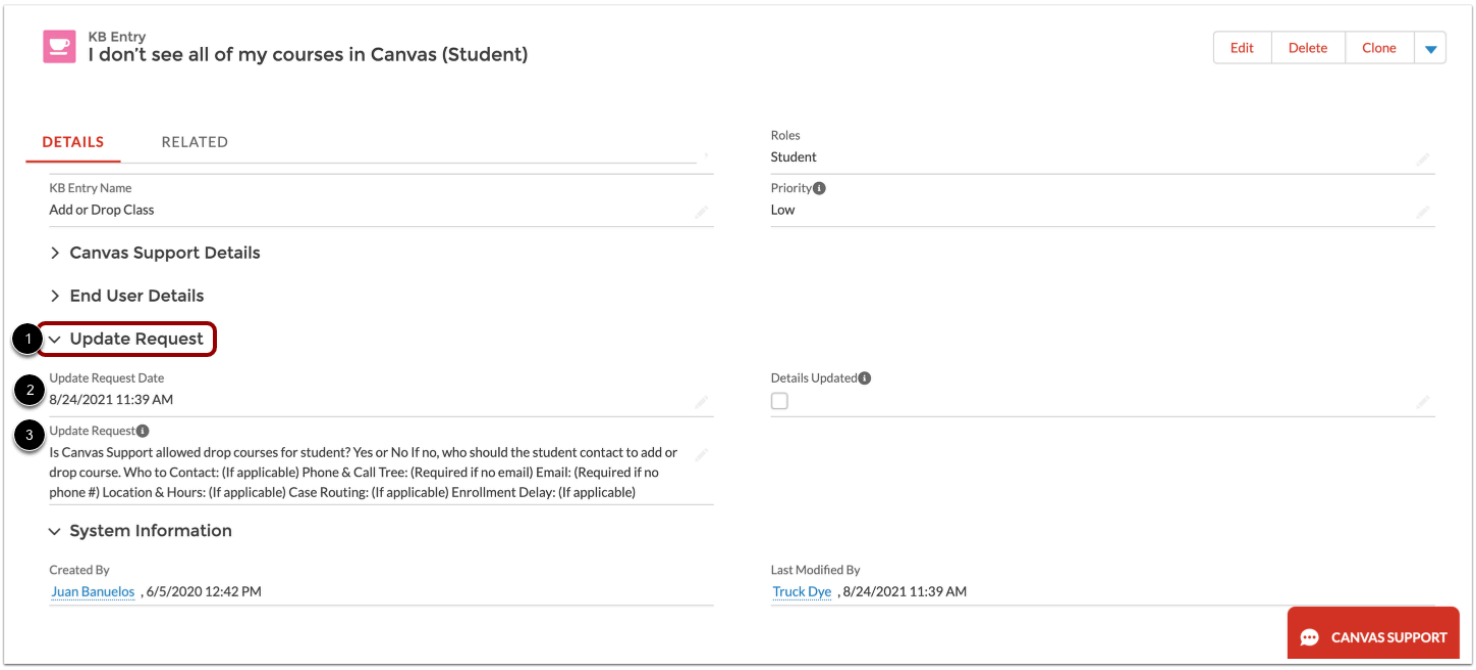
Open Update Request



KB update requests display in the **KB Update Requests** list [1]. To open an update request, click the name of the request [2].

To view all update requests, click the **View All** link [3].

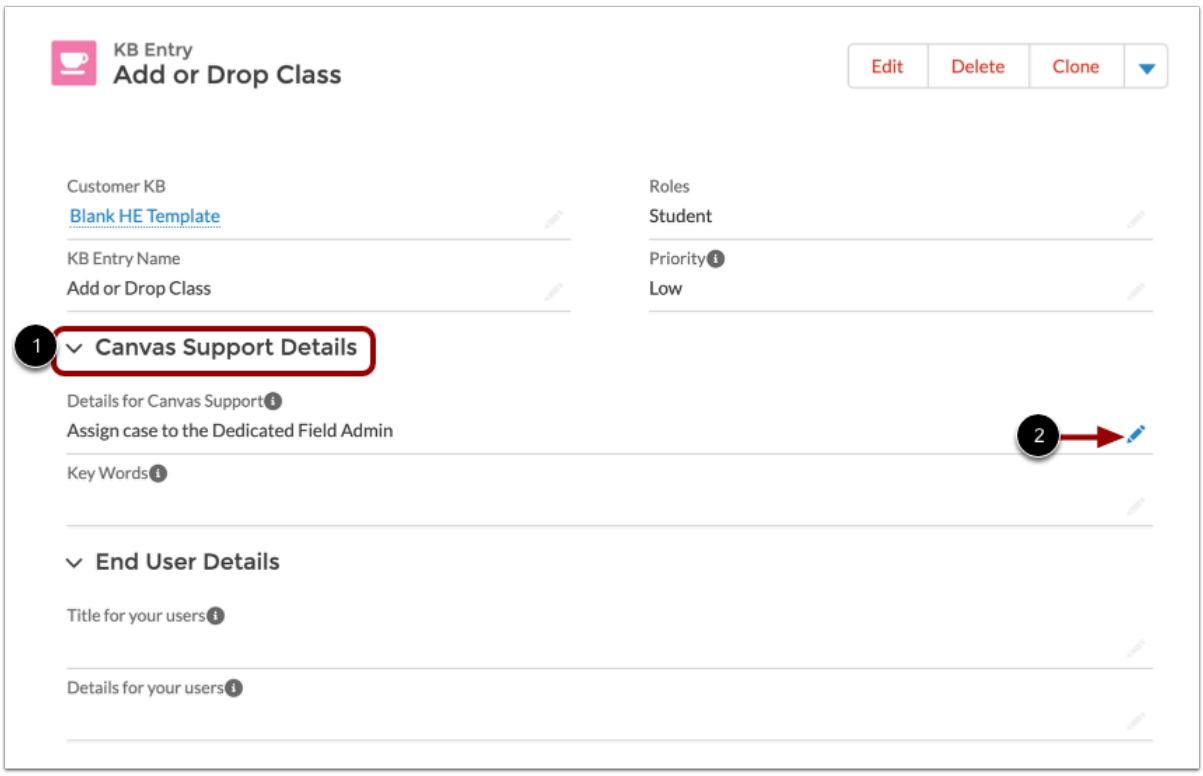
View Update Request



KB update details display in the **Update Request** section [1].

View the request date and time in the **Update Request Date** field [2]. View the KB addition suggestion from Canvas Support in the **Update Request** field [3].

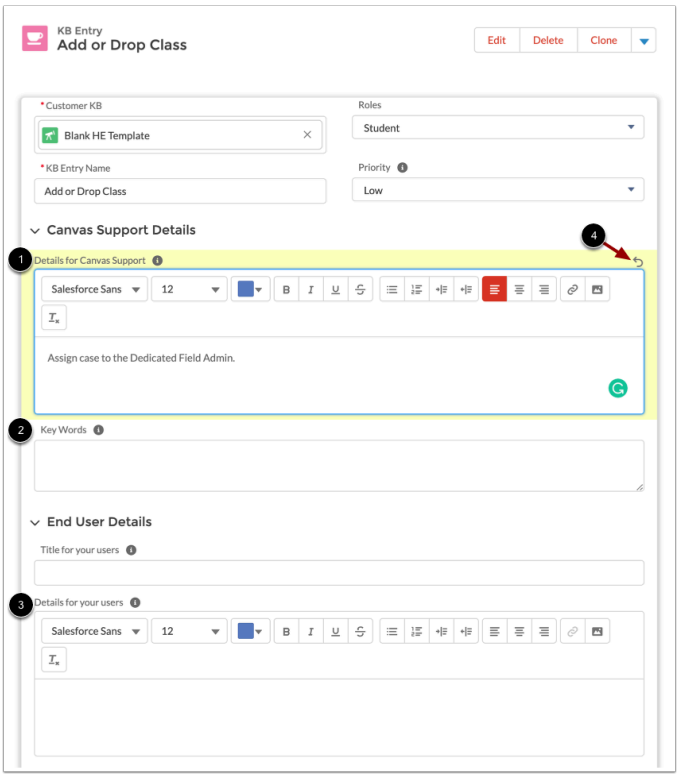
Edit KB Entry



KB updates can be made in the **Canvas Support Details** section [1].

To edit your KB entry, click the **Edit** icon for any field [2].

Enter Case Handling Details

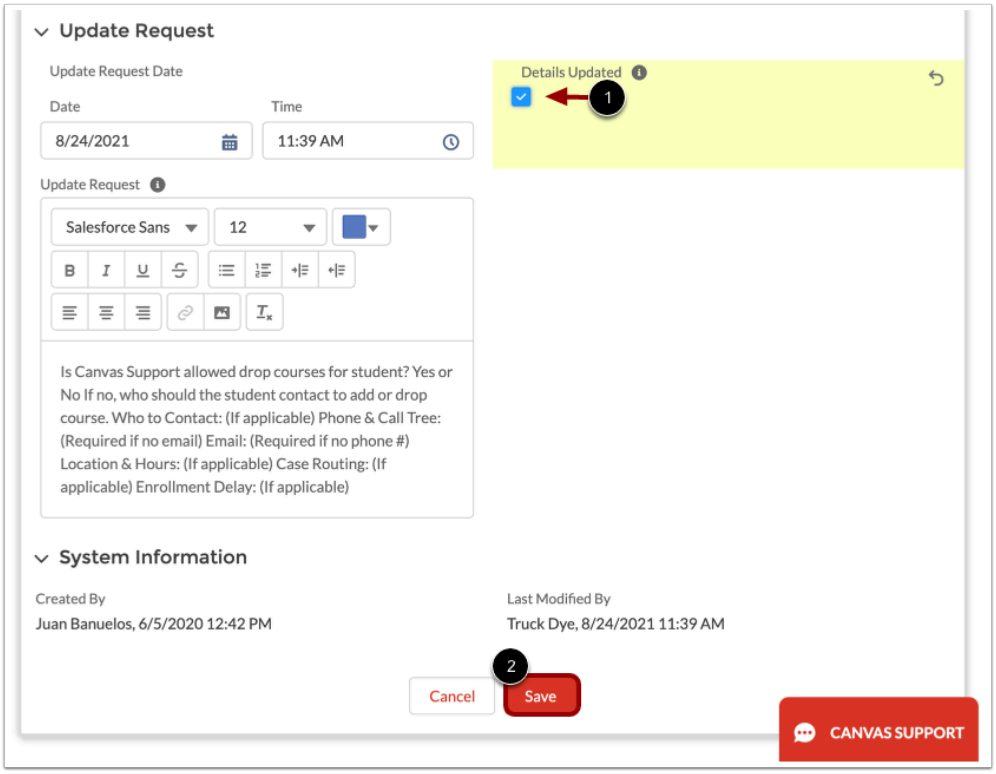


Enter updates to your KB entry in the Default Case Handling fields:

- The **Details for Canvas Support** field displays any relevant information for how Canvas Support should handle related cases [1].
- The **Key Words** field displays any related terms or words that users might use when submitting a case related to the KB entry [2].
- The **Details for your users** field displays a scripted response that support agents can use when responding to related cases [3].
-

KB entry fields will display a highlighted border once any changes have been made. To undo edits, click the **Undo** icon [4].

Save Changes



To remove the KB entry from the KB Update Requests list on the home page, click the **Details Updated** checkbox [1].

To save your changes, click the **Save** button [2].

Notes:

- Checking the Details Updated checkbox and saving your changes will also clear all content from the Update Requests fields.
- When viewing your KB, Canvas support agents will be able to view when the last change was made to the entry.

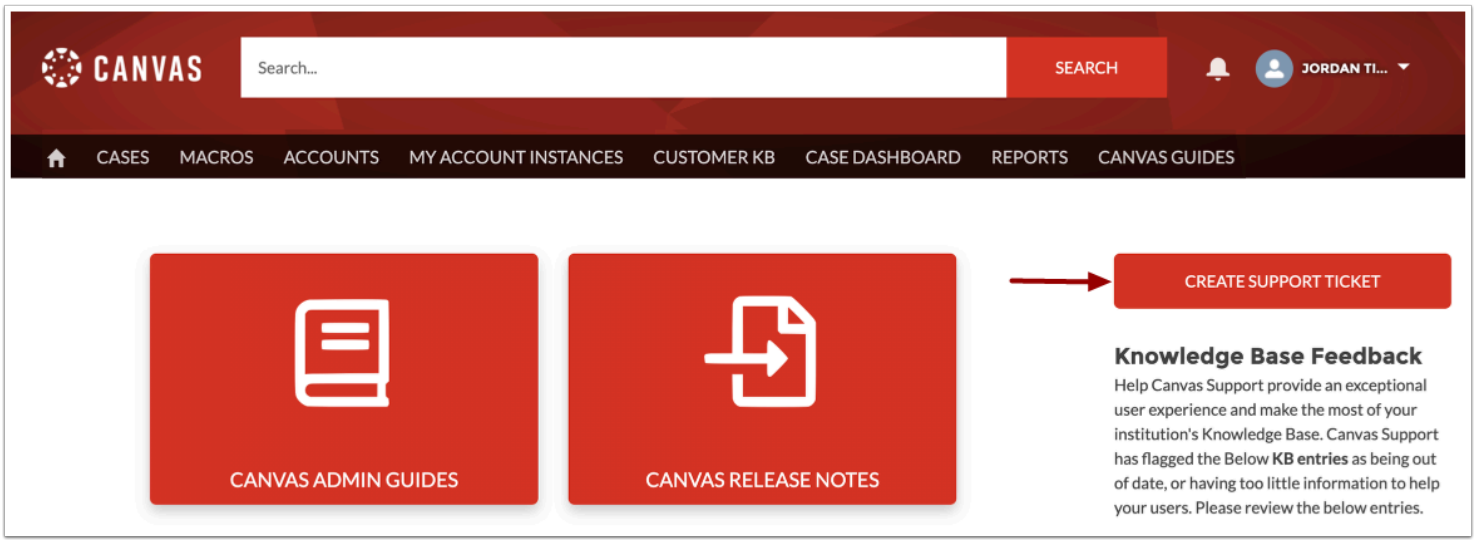
How do I create a case in the Field Admin Console?

After logging in, you can create a case from the Field Admin Console. New cases can be added to your list of open cases or escalated to Canvas Support.

If your institution uses an Instructure-managed SIS, you may be able to create an SIS support ticket or escalate an existing Canvas Support ticket to the SIS support team.

Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Create New Case



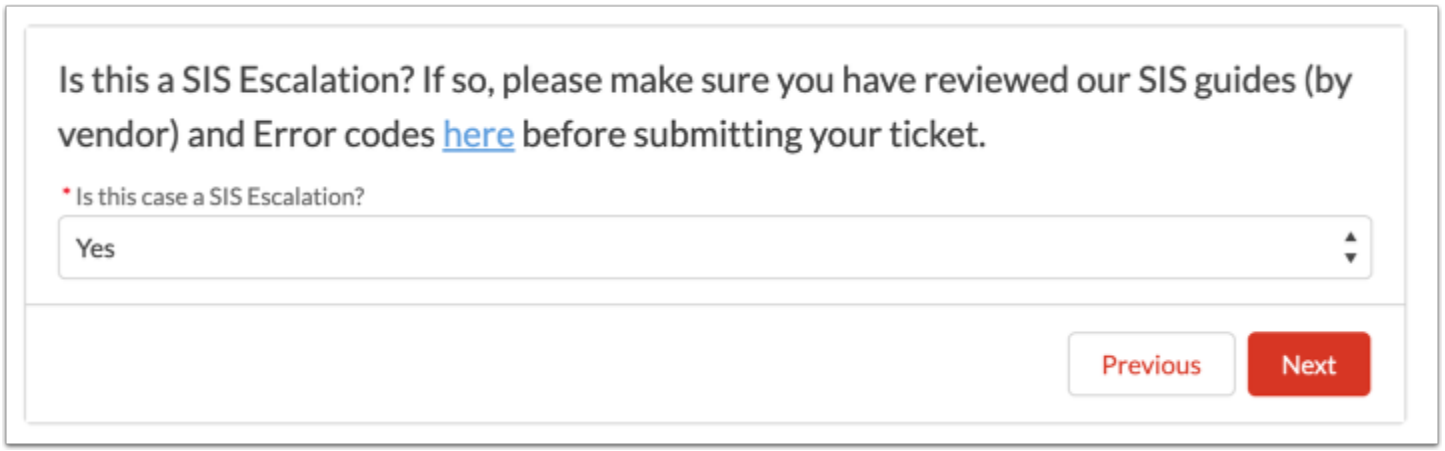
In the Field Admin Console home page, click the **Create Support Ticket** button.

Select Instance



Select the instance in which you are creating the case using the **Which Instance for this Case?** dropdown [1]. Then click the **Next** button [2].

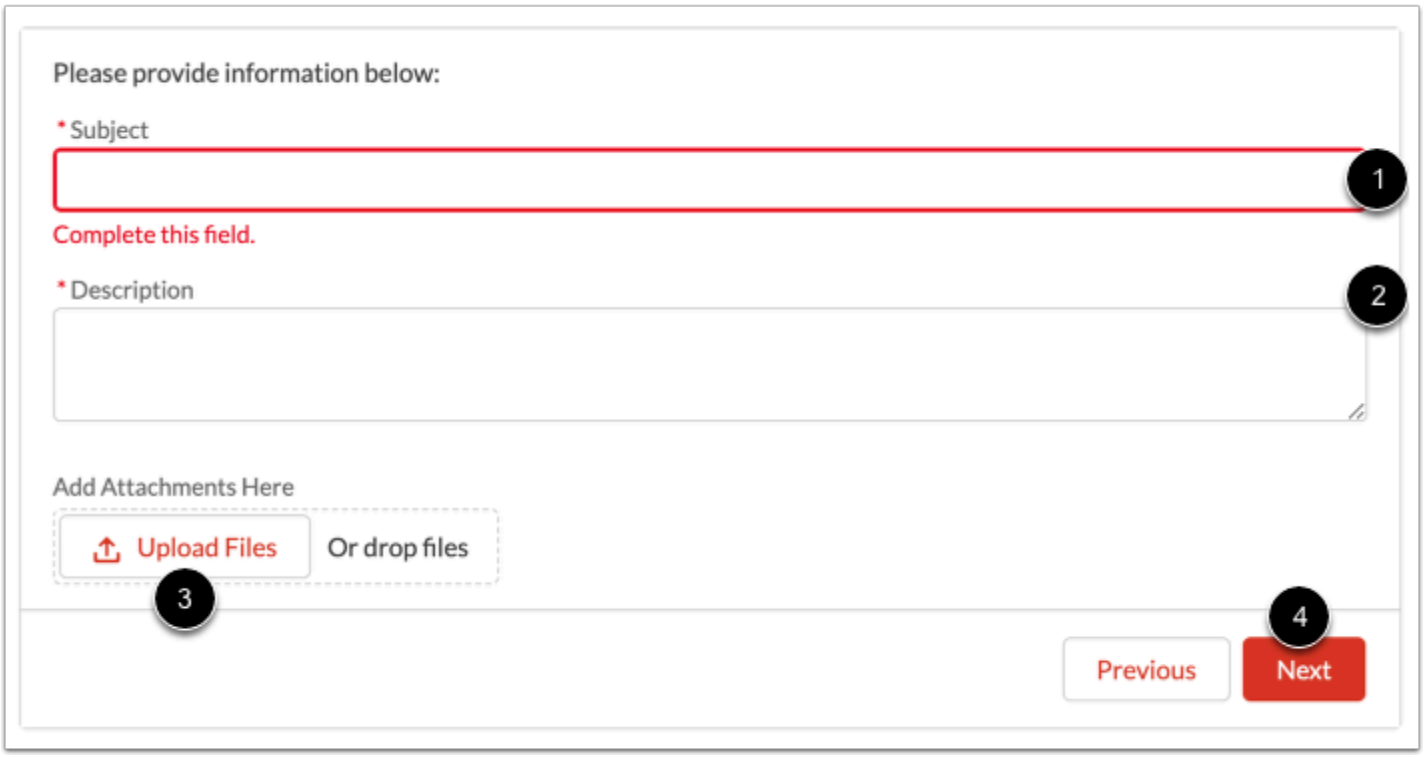
Escalate SIS Case



If your instance is authorized to escalate SIS cases, a SIS escalation prompt displays.

Learn more about creating a SIS escalation case.

Add Case Details



Enter a subject for the case in the **Subject** field [1] and a description in the **Description** field [2].

To add an attachment to the case, drag and drop files or click the **Upload Files** button [3].

To submit your case, click the **Next** button [5].

View Case



When submitted successfully, your case number displays [1].

To view full case details, click the **Next** button [2].

How do I create an SIS support case in the Field Admin Console?

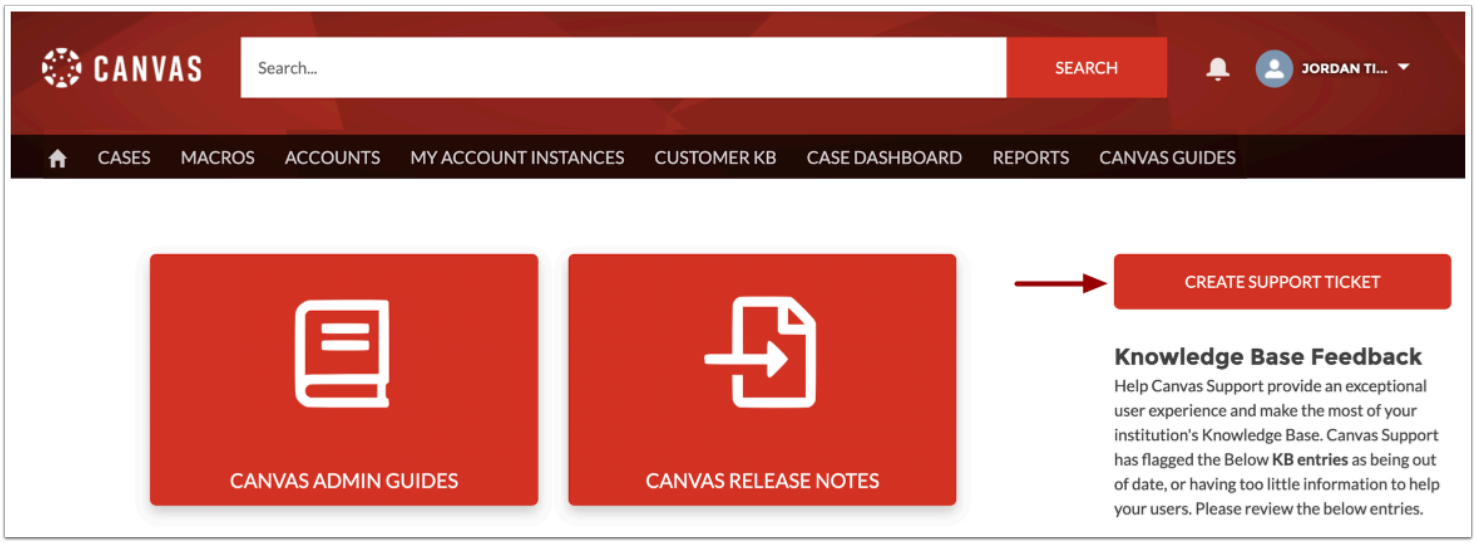
If you use an Instructure-managed SIS integration, you can create an SIS support case from the Field Admin Console. You can select to escalate SIS support cases to the SIS support team while creating a case. You can also escalate an existing support case to the SIS support team.

For non-SIS related issues, please submit a Canvas support case.

Notes:

- Field Admin Console features vary based on account and user settings. Based on the permissions for your role, you may not be able to view or create SIS support cases.
- SIS escalated cases are not subject to Targeted Initial Responses or Service Level Agreements. If further attention is needed on your case, please contact your Customer Success Manager (CSM).

Create New SIS Case



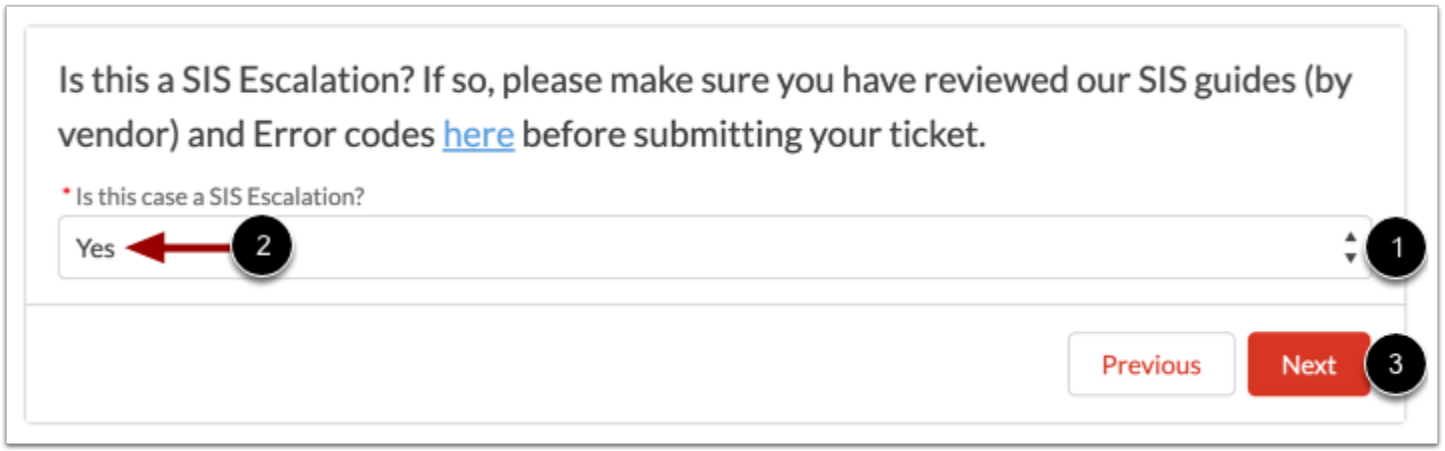
In the Field Admin Console home page, click the **Create Support Ticket** button.

Select Instance



Select the instance in which you are creating the case using the **Which Instance for this Case?** dropdown [1]. Then click the **Next** button [2].

Escalate SIS Case



If your instance is authorized to escalate SIS cases, a SIS escalation prompt displays.

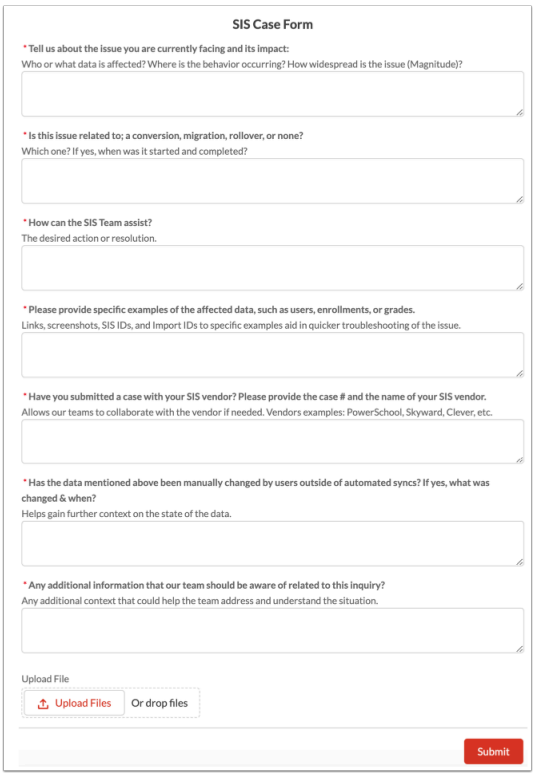
Consider reviewing SIS guides and error codes before escalating your ticket.

To escalate your case to the SIS support team, click the **Is this case a SIS Escalation?** dropdown [1] then click the **Yes** option [2].

To proceed, click the **Next** button [3].

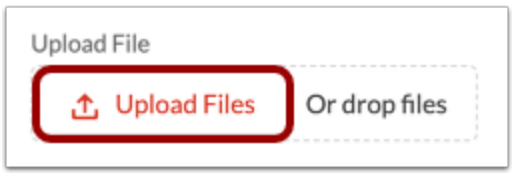
Note: If your case is not SIS-related, submit a Canvas Support case.

Add Case Details



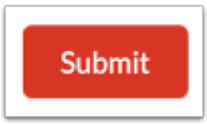
Answer each of the questions in the SIS case form.

Add Attachment



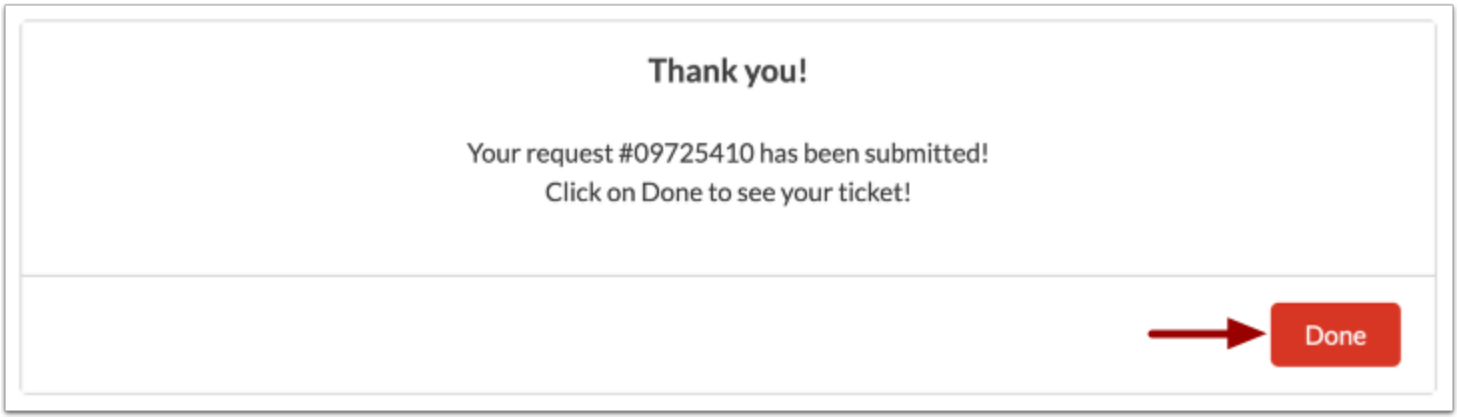
To add an attachment to the case, drag and drop files or click the **Upload Files** button.

Submit Case



To submit the case, click the **Submit** button.

View SIS Case



View your submission confirmation.

To view case details, click the **Done** button.

How do I view my support cases in the Instructure support portal?

As a field admin, you can view and manage cases using the Cases table. The Cases table displays all open cases in your account but can be filtered to display cases that meet specific criteria.

You can log in to the Field Admin Console at adminconsole.canvaslms.com.

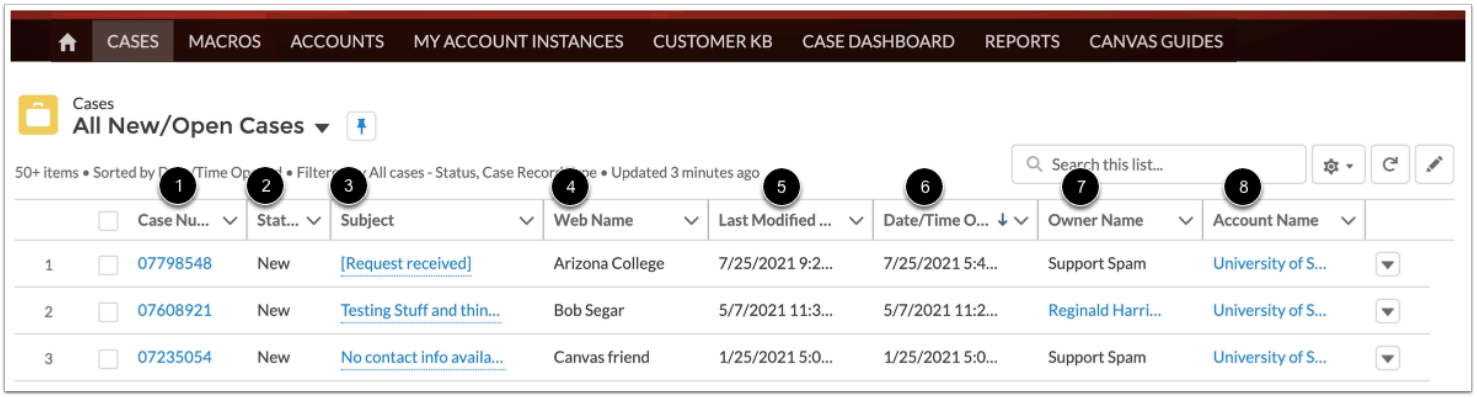
Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Open Cases



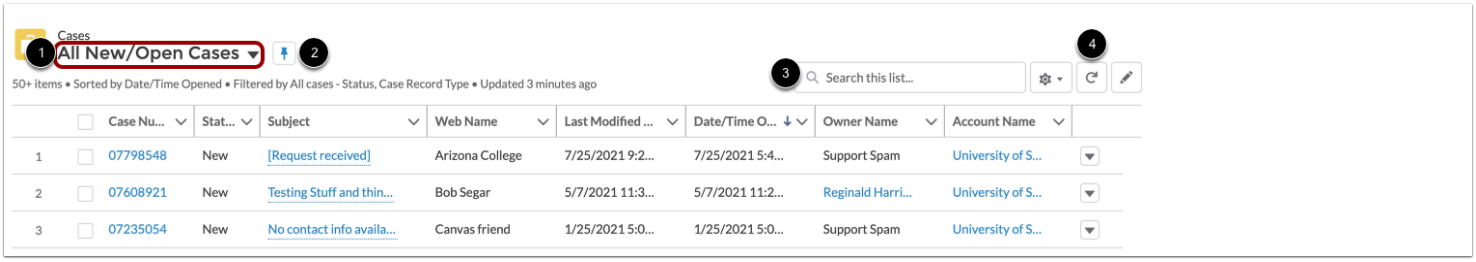
In the Field Admin Console home page, click the **Cases** tab.

View Cases



The Cases page displays the Cases table, which lists open cases from accounts you manage. Each case displays a case number [1], status [2], subject [3], user who created the case [4], date of last modification [5], date and time the case was opened [6], owner name [7], and account name [8].

Filter Cases Table

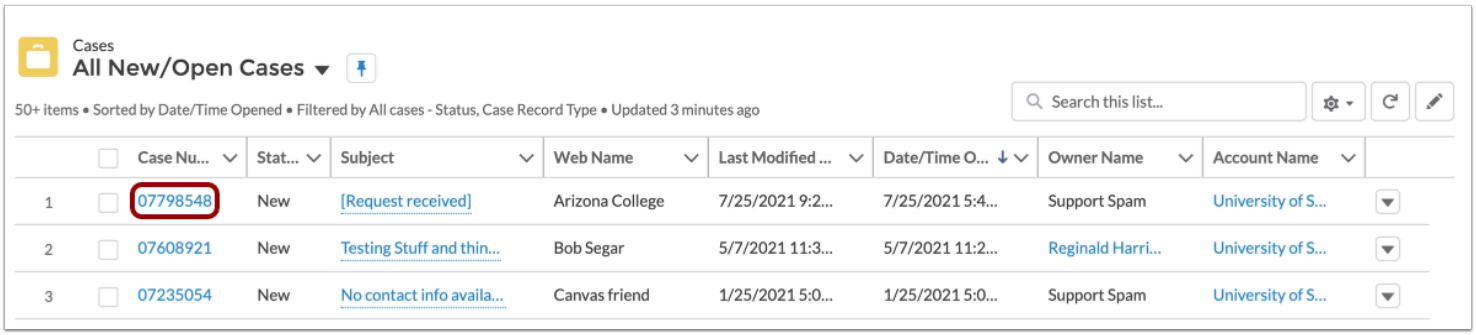


To filter the Cases table, click the **Filter** menu [1]. You can filter cases by Instructure product, status, cases created today, cases assigned to you, recently viewed cases, or triaged cases.

To pin a filter as the default view for the Cases page, click the **Pin** icon [2].

To search the Cases table, click the **Search** field [3]. To refresh the table, click the **Refresh** button [4].

Open Case



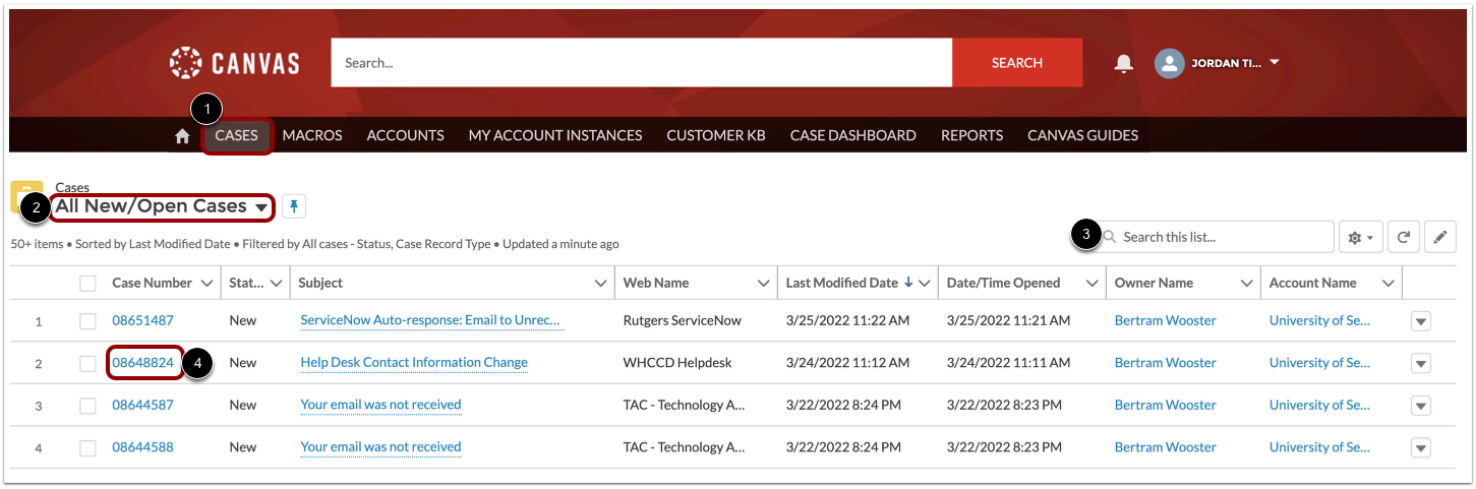
To open a case, click the case number.

How do I manage an individual case in the Field Admin Console?

After you have opened a case from the Cases page, you can manage details for an individual case.

Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Open Case



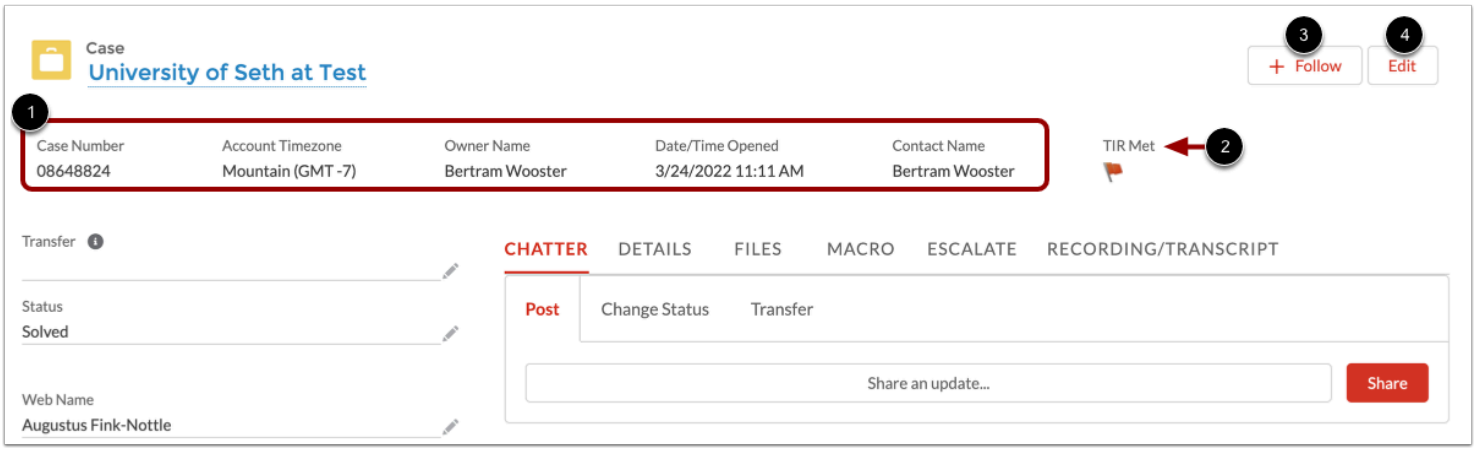
To view all cases, click the **Cases** tab [1].

To filter cases by Instructure product, status, cases created today, cases assigned to you, recently viewed cases, or triaged cases, click the **Filter** menu [2].

To search for a case, enter the case number or details in the **Search** field [3].

The click the case number link for the case you want to view [4].

View Case

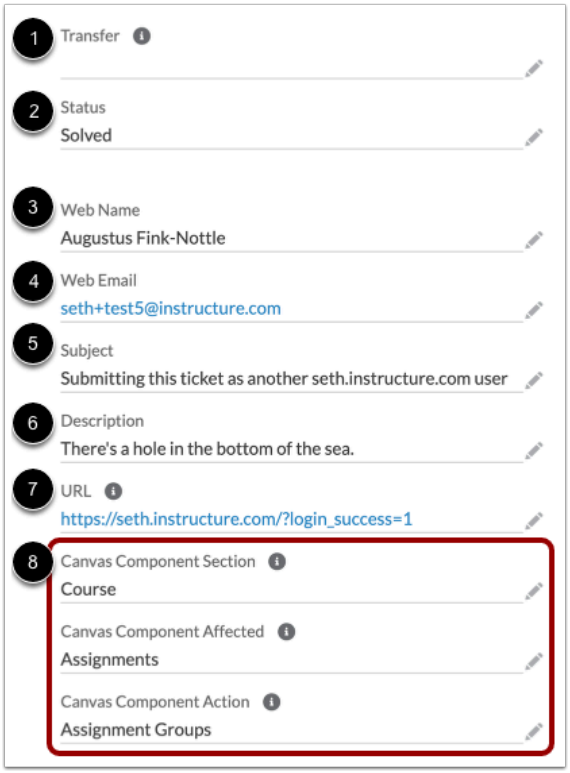


Each case displays important details at a glance [1], including case number, owner name, date/time opened, highest escalation level, and contact name.

You can also view the TIR status in the **TIR Met** field [2]. If the TIR was met, the field will display a Green flag icon. If the TIR was missed, the field will display a Red flag icon.

To follow a case, click the **Follow** button [3]. To edit case details, click the **Edit** button [4].

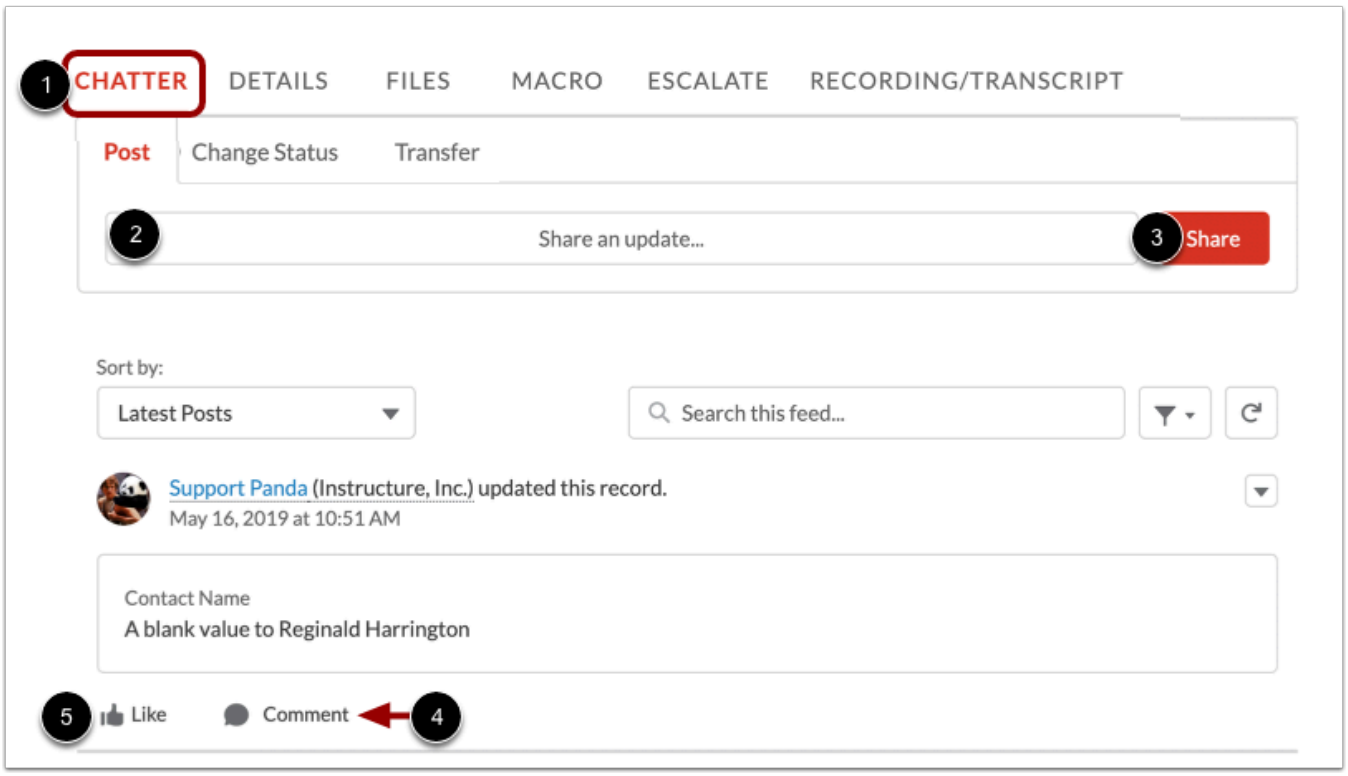
View Case Details



The Case Details fields allow you to view and edit information about the case, including:

- user to whom the case will be transferred [1]
- case status [2]
- name of the person who submitted the case[3]
- email address of the person who submitted the case [4]
- case subject [5]
- case description [6]
- Canvas URL where the case was submitted [7]
- Canvas components [8]

View Chatter Tab



To view the case activity feed and comments, click the **Chatter** tab [1].

To add a comment to the case, enter your comment in the **Share an update** field [2] and click the **Share** button [3]. Comments entered through the Post option sends an email to the address listed in the Web email field for the case.

To attach a comment to feed item, click the **Comment** link for the item [4]. To like a feed item, click the **Like** link [5].

Change Case Status



To change the case status, click the **Change Status** tab [1]. Then select the new status from the **Status** drop-down menu [2]. To save the status, click the **Save** button [3].

Note: When sending a message to Canvas Support, change the case status to Open. Otherwise, the support team may not receive your update.

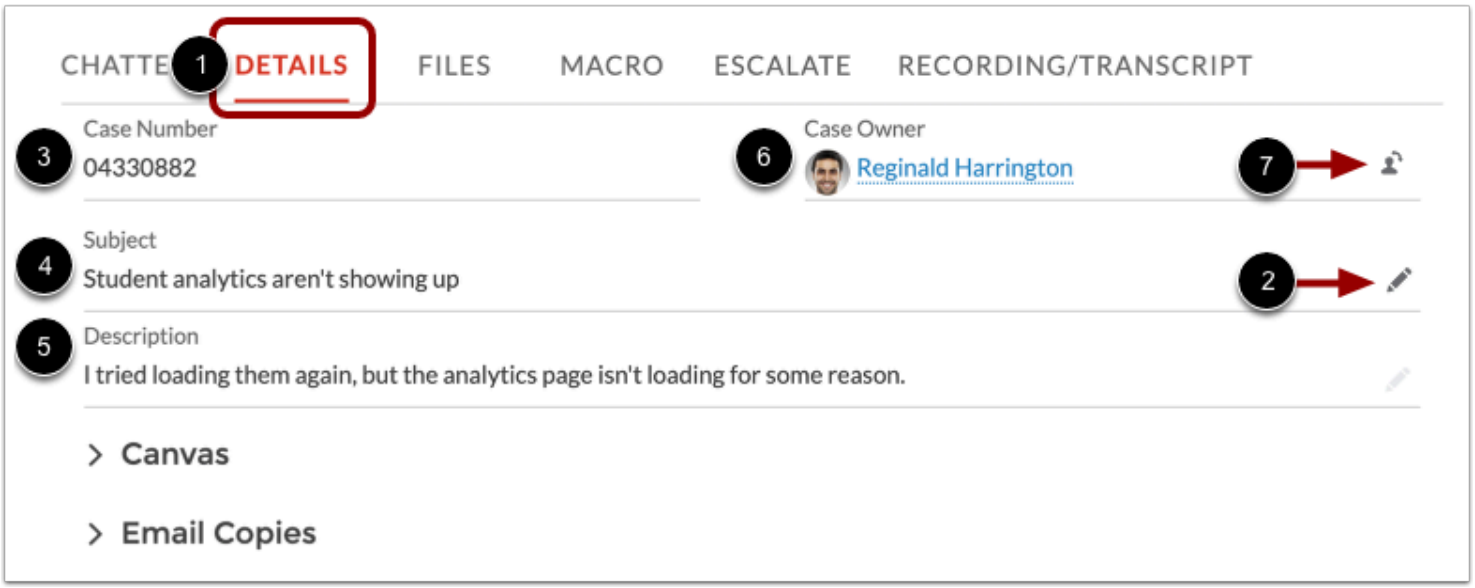
Transfer Case



To transfer the case, click the **Transfer** tab [1]. Then click the search field to located the field admin who will receive the case [2].

To save, click the **Save** button [3].

View Details Tab



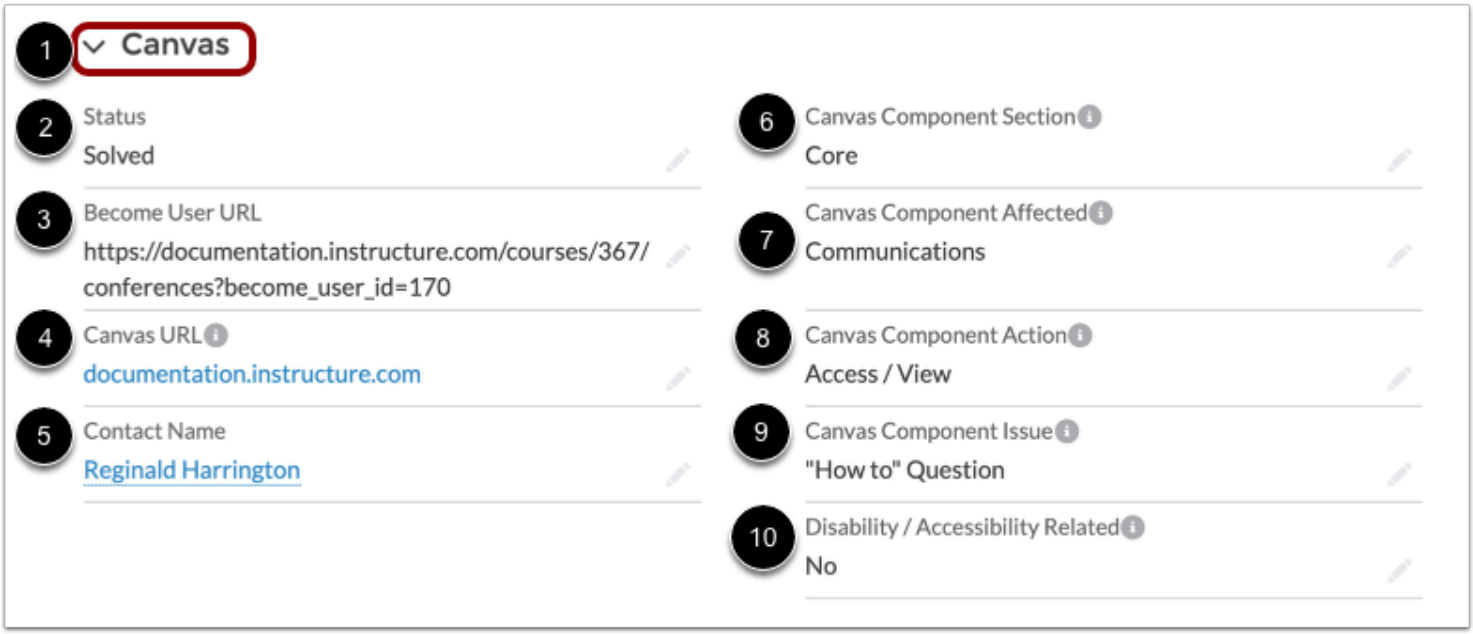
To view case details, click the **Details** tab [1]. From the Details tab, you can view and edit information about a case.

To edit a field in the Case Details tab, click the **Edit** icon [2].

The **Case Number** field displays the case number [3]. The **Subject** field displays what the end-user typed in the subject line [4]. The **Description** field displays what the end-user typed in the case [5].

The **Case Owner** field displays the user currently assigned to the case [6]. To change the case owner, click the **Case Owner** icon [7].

View Canvas Details



The **Canvas Details** section displays Canvas-specific information about the case [1]:

- **Status** [2]: displays the case status. Status can be set to open, new, pending, on hold, solved, or closed as duplicate.
- **Become User URL** [3]: displays the page where the user submitted the ticket. This URL also allows you to see what the end user sees in Canvas.
- **Canvas URL** [4]: displays Canvas instance from which case was submitted.
- **Contact Name** [5]: displays the name of the individual who facilitates communication with the Requester.
- **Canvas Component Section** [6]: describes whether the case relates to an entire account, a specific course, a Canvas user, an LTI or integration, or a non-Canvas issue.
- **Canvas Component Affected** [7]: describes the feature in Canvas where the bug or issue comes from.
- **Canvas Component Action** [8]: describes the action that led to the case creation.
- **Canvas Component Issue** [9]: describes the purpose behind the case creation.
- **Disability/Accessibility Related** [10]: designates if the case relates to disability or accessibility concerns.

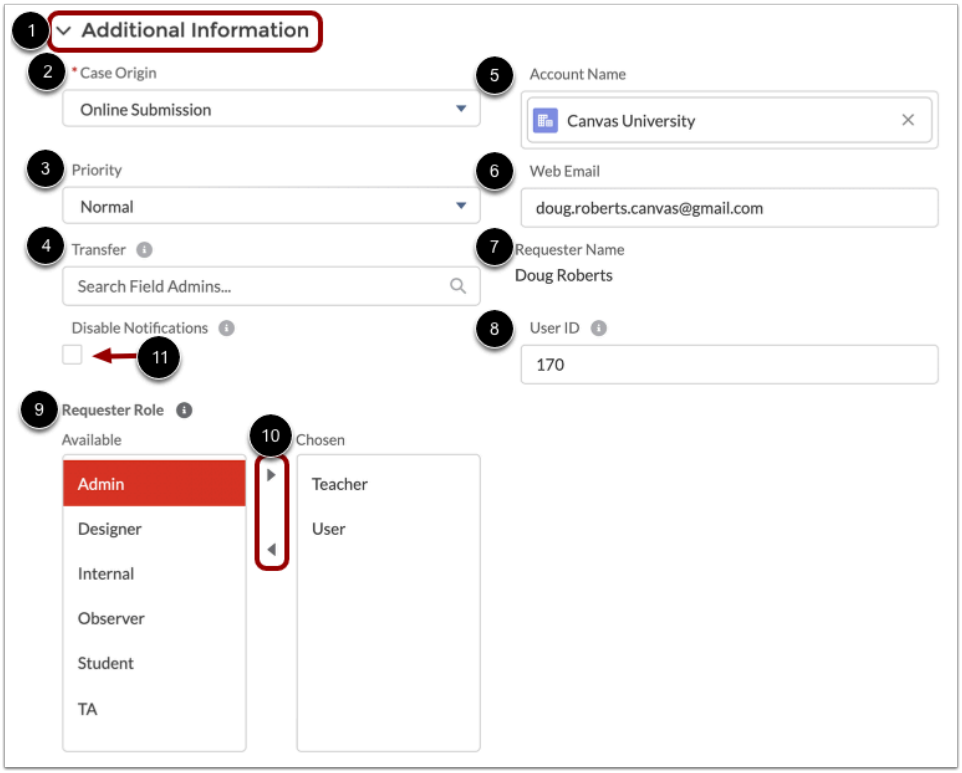
To learn more about options available for the Canvas Components fields, view the Canvas Component resource document.

Add Email Copies



The **Add CC** field contains any email address that will receive notifications for case updates.

View Additional Information



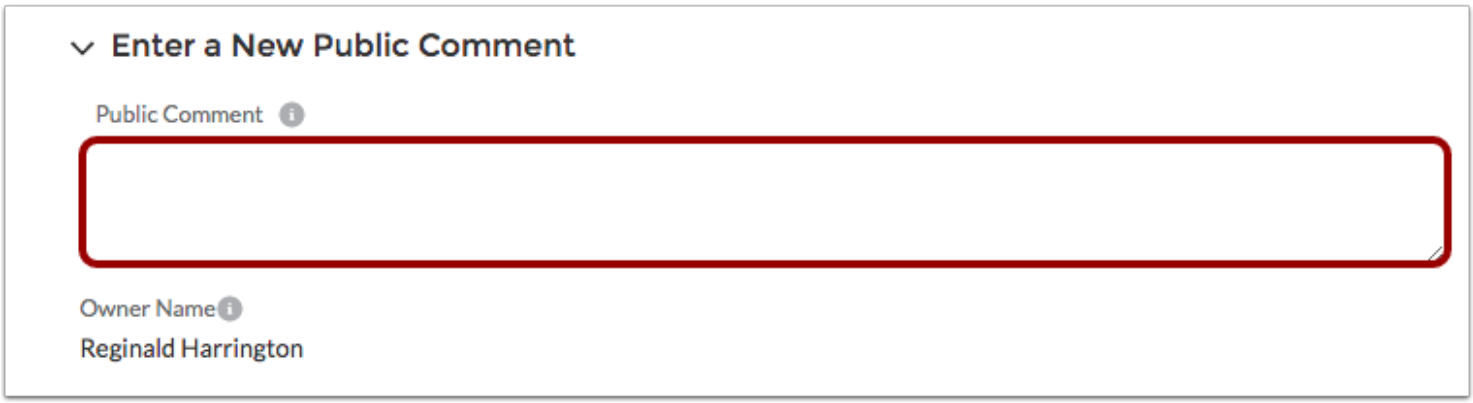
The **Additional Information** section displays additional information that relates to the case [1]:

- **Case Origin** [2]: displays where the case originated, such as email, phone, or online submission.
- **Priority** [3]: describes the urgency with which the case should be addressed.
- **Transfer** [4]: allows users to transfer case to another field admin.

- **Account Name** [5]: displays the name of the account
- **Web Email** [6]: displays the requester's email address.
- **Requester Name** [7]: displays the name of the user who created the case.
- **User ID** [8]: displays the requester's user ID.
- **Requester Role** [9]: displays the requester's role(s). To add or remove a role, click the role title and click the Arrow keys [10].

To disable notifications on the case, click the **Disable Notifications** checkbox [11].

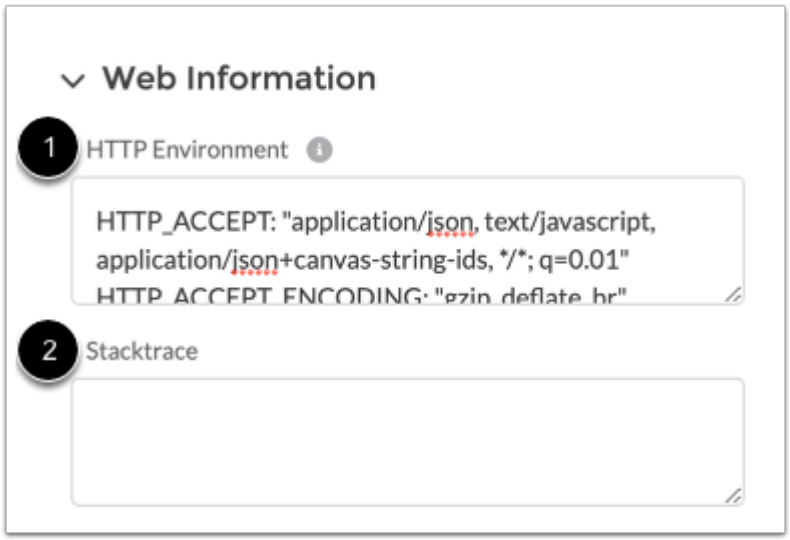
Add Comment



To add a comment to the case, enter the comment in the **Public Comment** field.

The **Owner Name** field displays the name of the case owner.

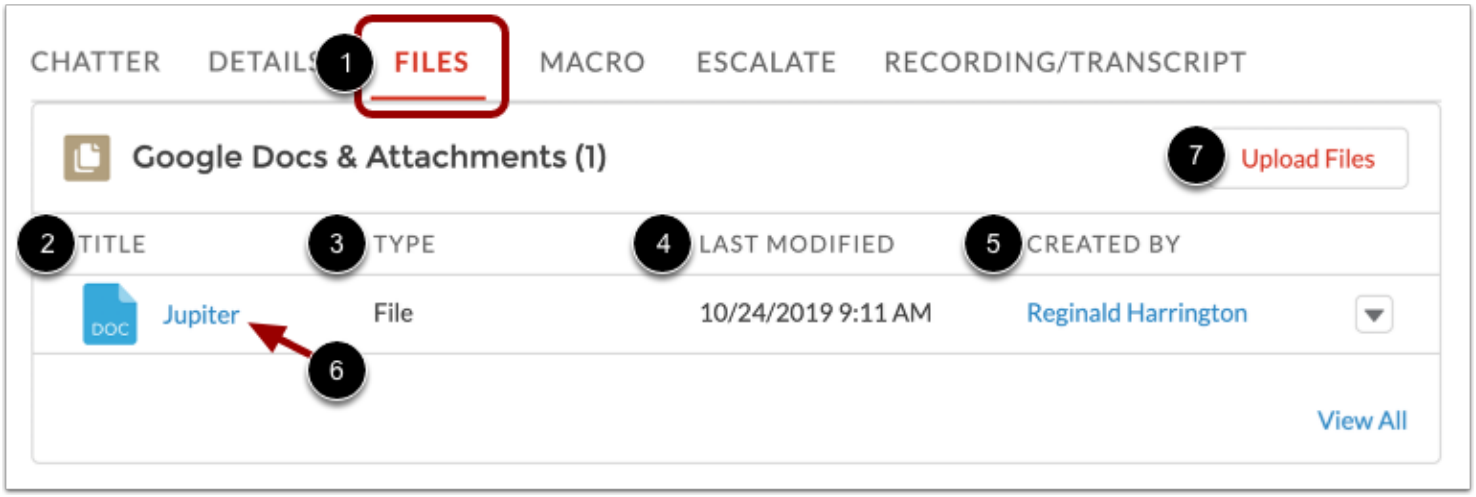
View Web Information



The **HTTP Environment** field indicates the end user's operating system, browser version, and IP address [1]. To interpret this string, visit the user agent string website and paste the text in the window for analysis.

The **Stacktrace** field contains the engineering error message [2]. 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.

View Files Tab

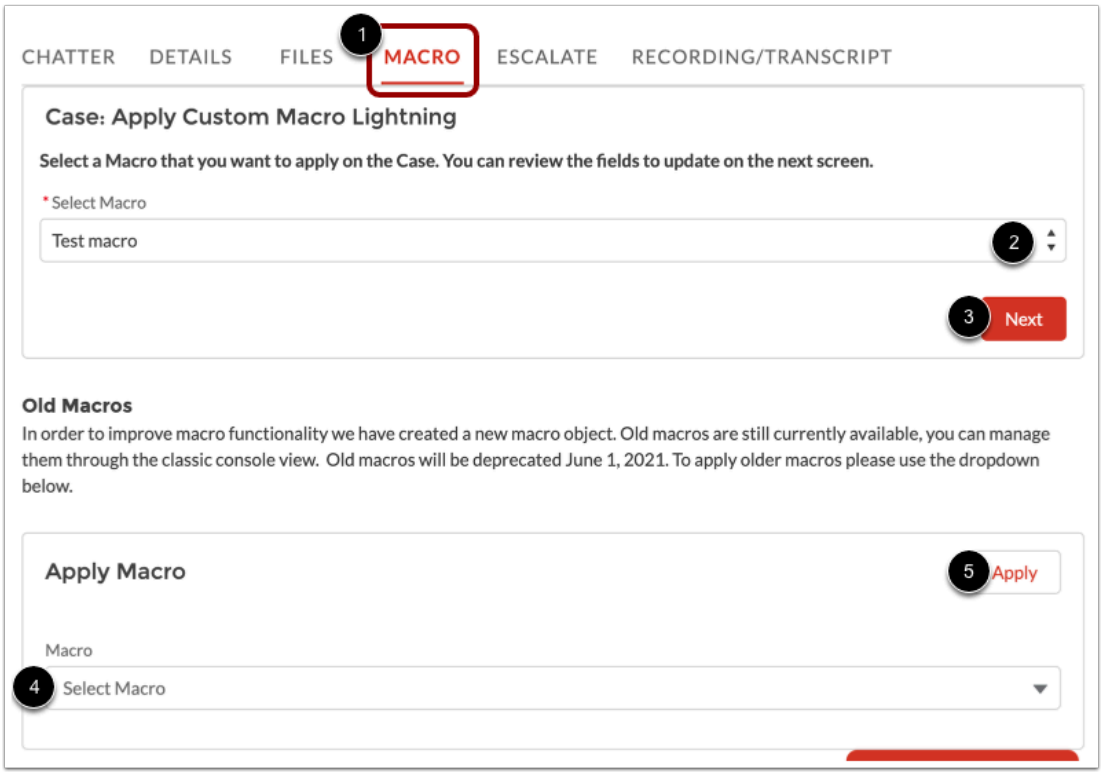


To view files, click the **Files** tab [1].

Each attached file displays the title [2], type [3], date of last modification [4], and user who attached the file [5].

To view a preview of the file, click the file title [6]. To attach a new file, click the **Upload Files** button [7].

View Macro Tab



To apply a macro to the case, click the **Macro** tab [1]. You can apply a classic macro object or new object.

To apply a new macro, click the **Select Macro** drop-down menu in the Apply Custom Macro Lighting menu [2]. Then click the **Next** button [3].

To apply a classic macro, click the **Macro** drop-down menu [4] and click the **Apply** button [5].

Note: Old macros were deprecated on June 1, 2021.

View Escalate Tab



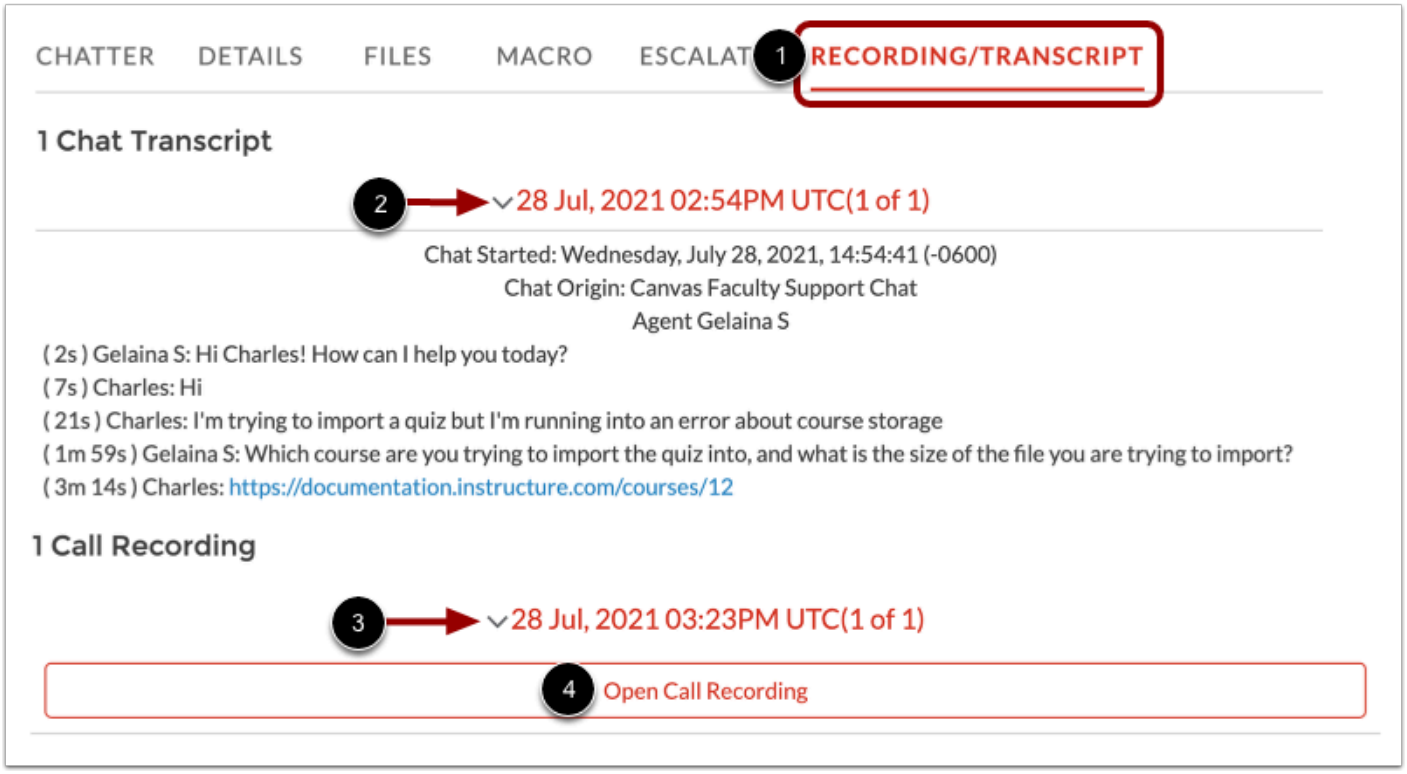
To escalate the case to Canvas Support, click the **Escalate** tab [1] and click the **Escalate** button [2].

View SIS Escalation Tab



To escalate the case to the SIS support team, click the **SIS Escalation** tab [1] and submit the SIS Case Form [2].

View Recording/Transcript Tab



To view phone recordings or chat transcripts from the case, click the **Recording/Transcript** tab [1].

To view the full transcript for a chat, click the chat transcript date link [2].

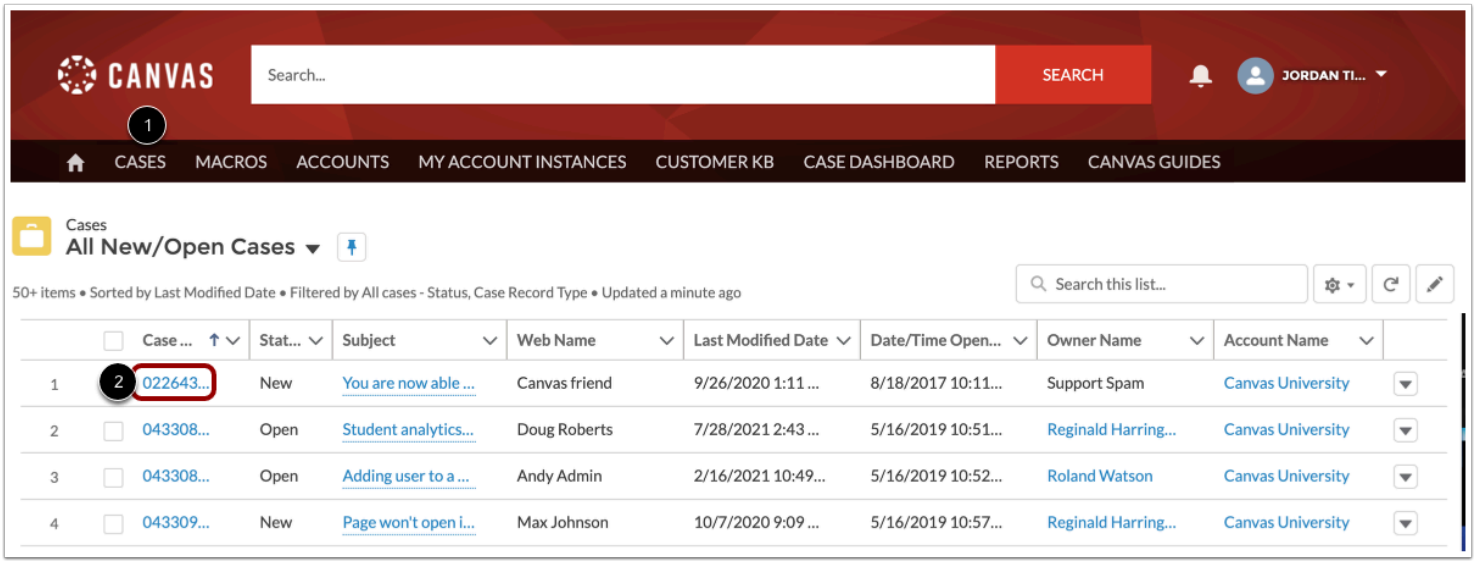
To listen to a call recording, click the call recording date link [3] and click the **Open Call Recording** button [4].

How do I escalate a case to Canvas Support in the Field Admin Console?

If necessary, you may be able to escalate a case to the Canvas support team in the Field Admin Console. Cases related to Instructure-managed SIS issues can be escalated to the SIS support team.

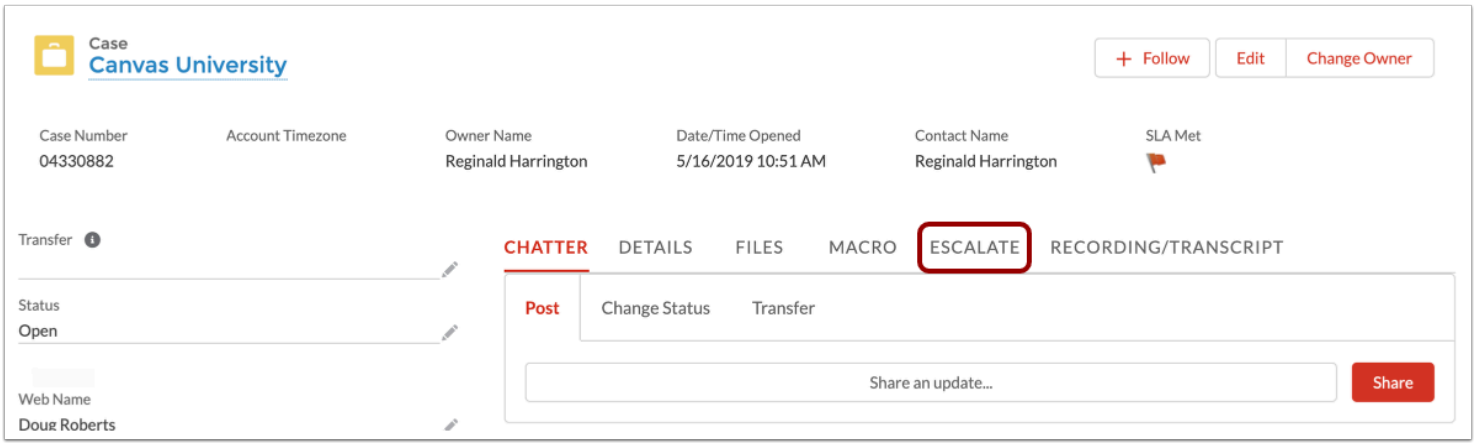
Note: Before escalating a case, try troubleshooting the issue or searching for the answer yourself. Try using the community forums or Canvas Guides.

Open Case



Click the **Cases** tab [1]. Then click the case number link for the case you want to escalate [2].

Open Escalate Tab



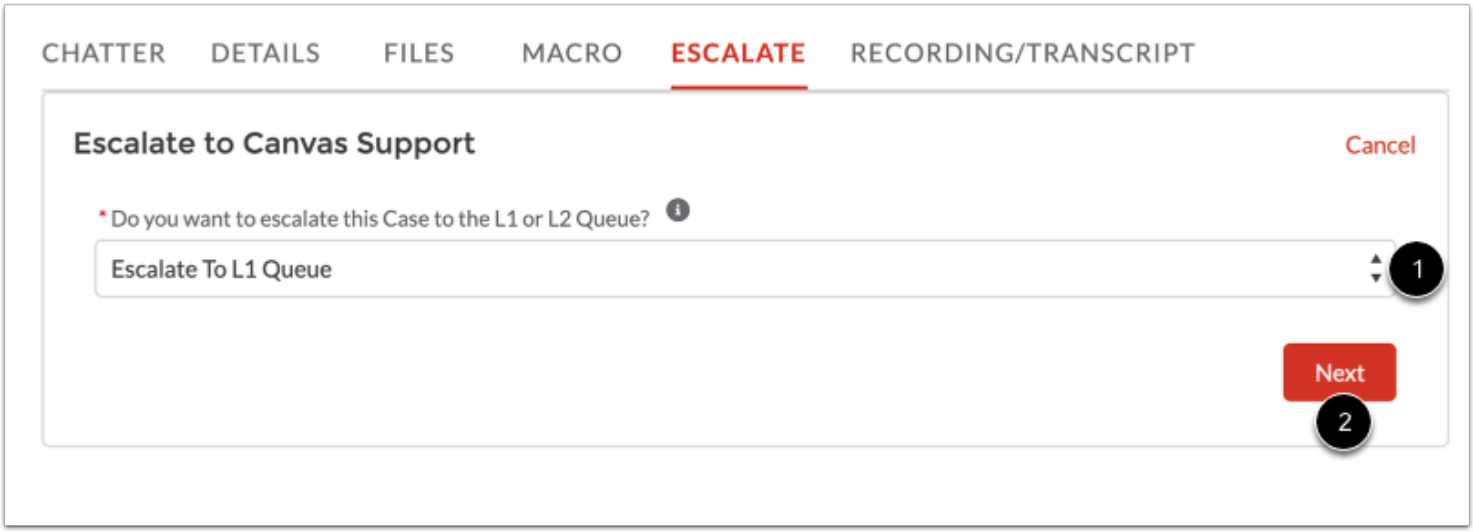
Click the **Escalate** tab.

Escalate Case



Click the **Escalate** button.

Select Queue



In the **Do you want to escalate this case to the L1 or L2 Queue** drop-down menu [1], select the L1 or L2 queue.

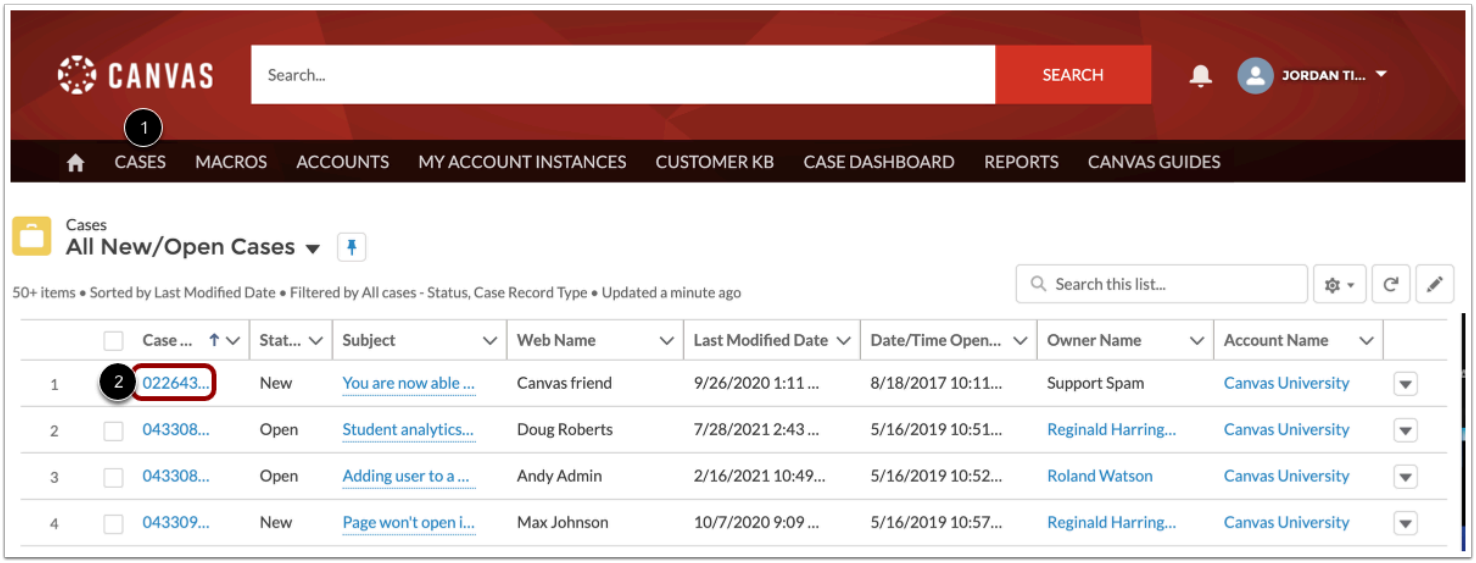
Then click the **Next** button [2].

How do I escalate an SIS case to SIS Support in the Field Admin Console?

If necessary, you may be able to escalate an SIS case to the SIS support team in the Field Admin Console. Cases unrelated to SIS issues must be escalated to the Canvas support team.

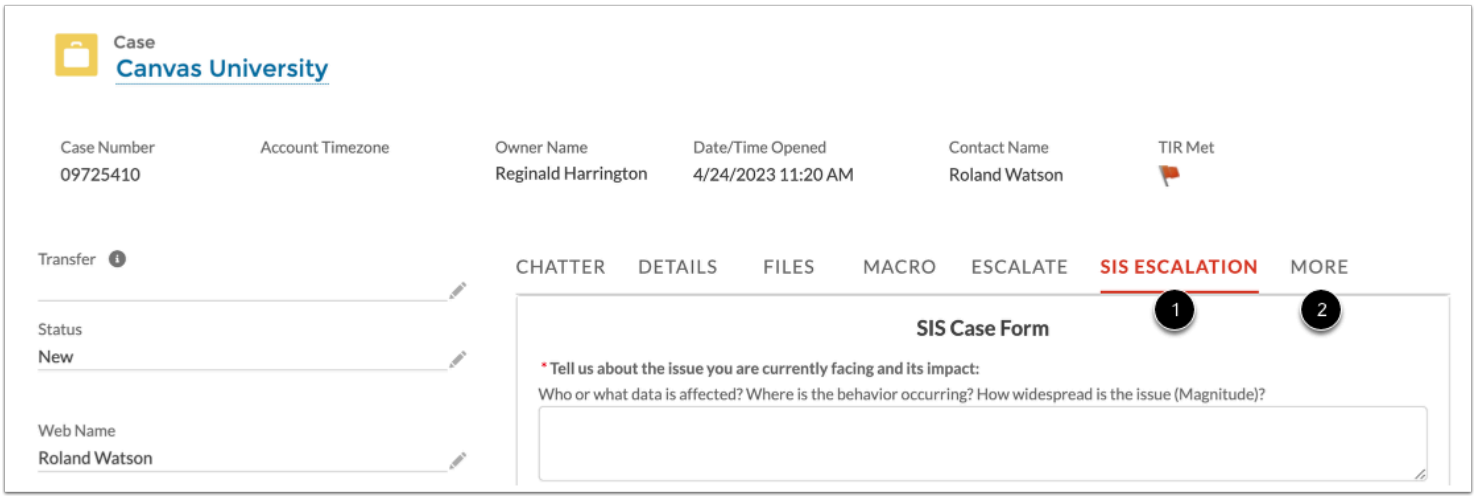
Note: Before escalating a case, please review the SIS guides and error codes.

Open Case



In the Field Admin Console, click the **Cases** tab [1]. Then click the case number link of the case you need to escalate [2].

Escalate to SIS Support Team

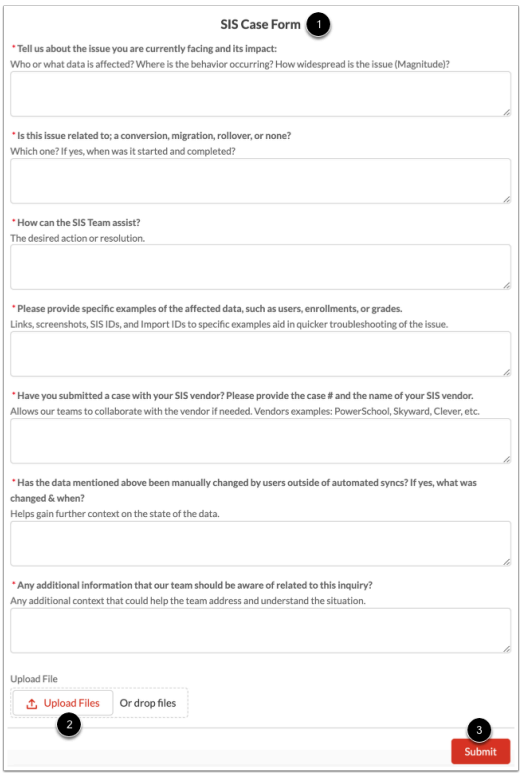


To escalate a case to the SIS support team, click the **SIS Escalation** tab [1].

Notes:

- Cases unrelated to SIS issues must be escalated to the Canvas support team.
- If the SIS Escalation tab does not display, you may need to click the **More** tab [2]. If the option still does not display, please contact your Customer Success Manager (CSM).

Submit Case Escalation



Answer each of the questions in the SIS case form [1].

To add an attachment to the case, drag and drop files or click the **Upload Files** button [2].

To escalate the case to the SIS support team, click the **Submit** button [3].

How do I create a macro in the Field Admin Console?

You can create a macro in the Field Admin Console. Macros allow you to apply set changes to any case in a few clicks. You can apply a macro when you view an individual case.

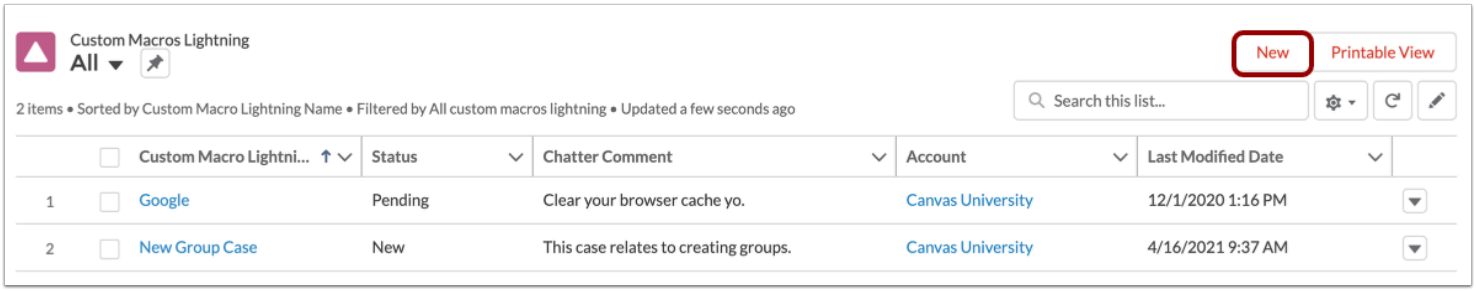
Note: Field Admin Console features may vary based on account and user settings. Based on the permissions for your role, you may not be able to view or use the features described in this lesson.

Open Macros



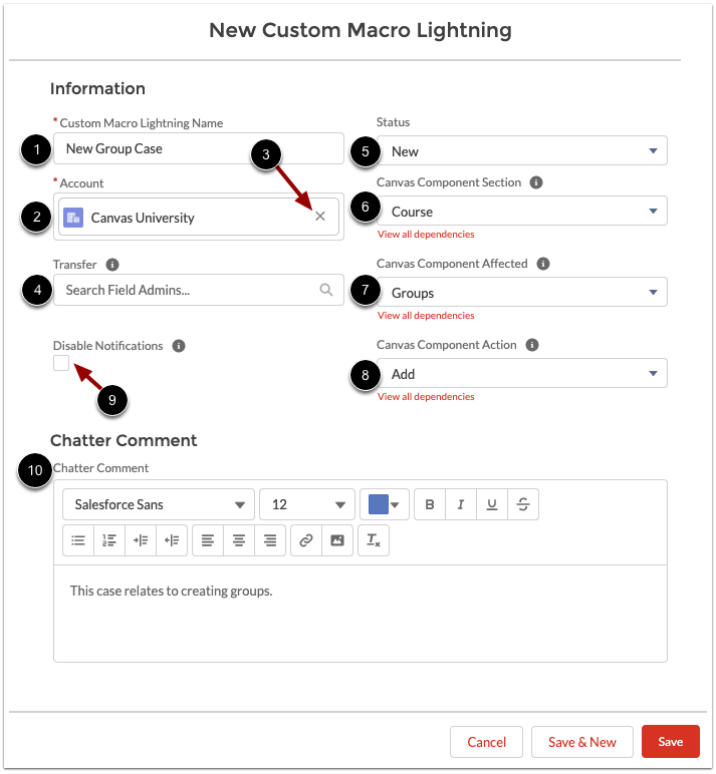
To open the Macros page, click the **Macros** tab.

Create New Macro



To create a new macro, click the **New** button.

Add Macro Details



Enter the details for the macro. Macro details include:

- **Name** [1]
- **Account** [2]: displays the account where macro can be used. To remove an account, click the Remove icon [3].
- **Transfer** [4]: transfers cases to designated field admin
- **Status** [5]: designates case status, which can be set to open, new, pending, on hold, solved, or closed as duplicate.
- **Canvas Component Section** [6]: describes whether the case relates to an entire account, a specific course, a Canvas user, an LTI or integration, or a non-Canvas issue.
- **Canvas Component Affected** [7]: describes the feature in Canvas where the bug or issue comes from.
- **Canvas Component Action** [8]: describes the action that led to the case creation.
- **Disable Notifications** [9]: prevents notification emails from sending to Case Owner, Case Contact, and Case CC.
- **Chatter Comment** [10]: adds comment to every case

To learn more about options available for the Canvas Components fields, view the Canvas Component resource document.

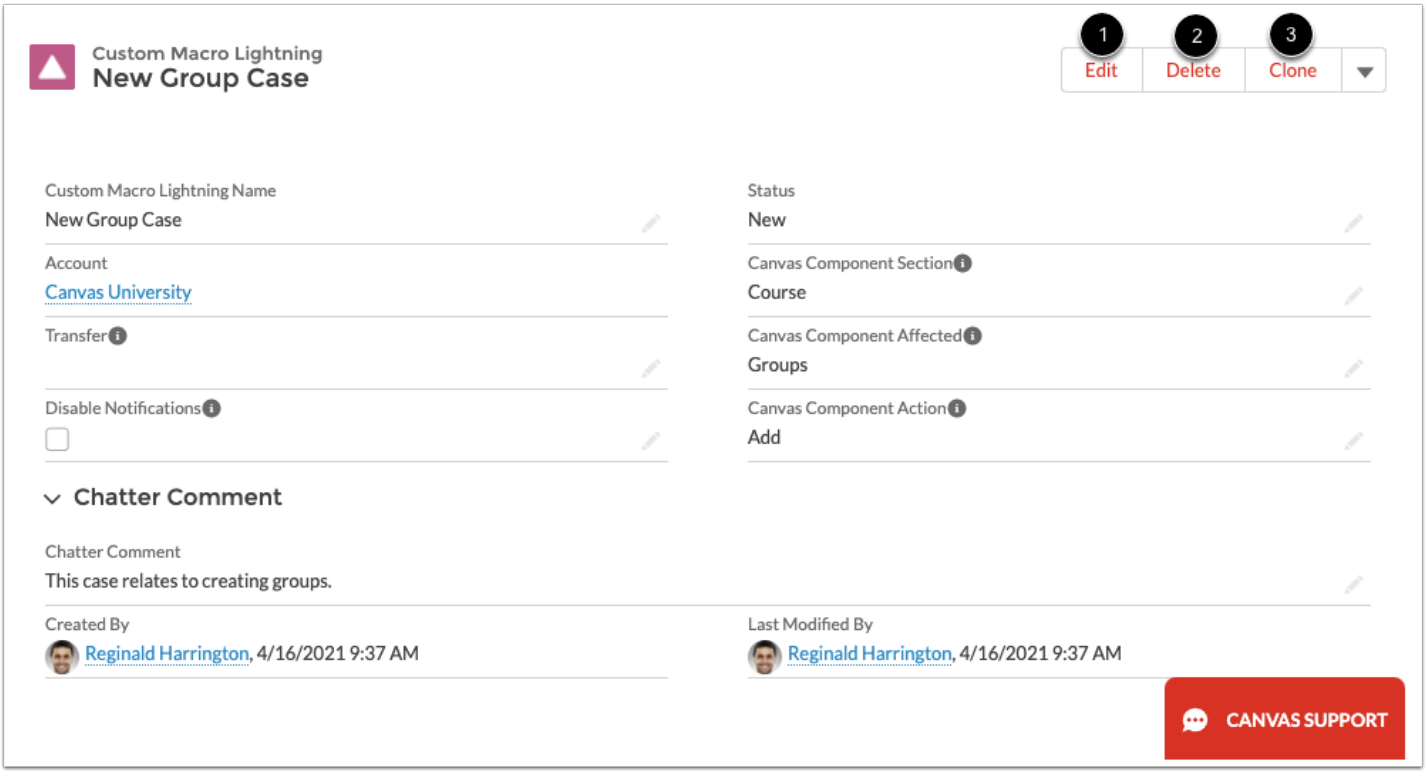
Save Macro



To save your macro, click the **Save** button [1]. To save your macro and begin creating a new macro, click the **Save & New** button [2].

To delete your macro, click the **Cancel** button [3].

View Macro



View the macro.

To edit the macro, click the **Edit** button [1]. To delete your macro, click the **Delete** button [2]. To duplicate your macro, click the **Clone** button [3].

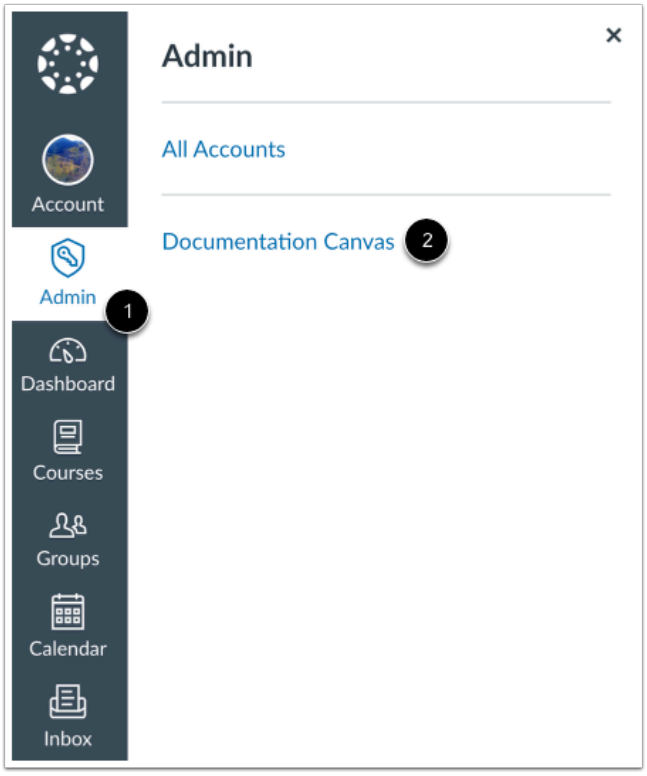
Grading

How do I view and manage grading schemes in an account?

You can view and manage your account's grading schemes, including grading schemes you have created for your account. You can also edit, duplicate, archive, unarchive, and delete grading schemes if necessary.

Any grading schemes created in your account display in sub-accounts.

Open Account



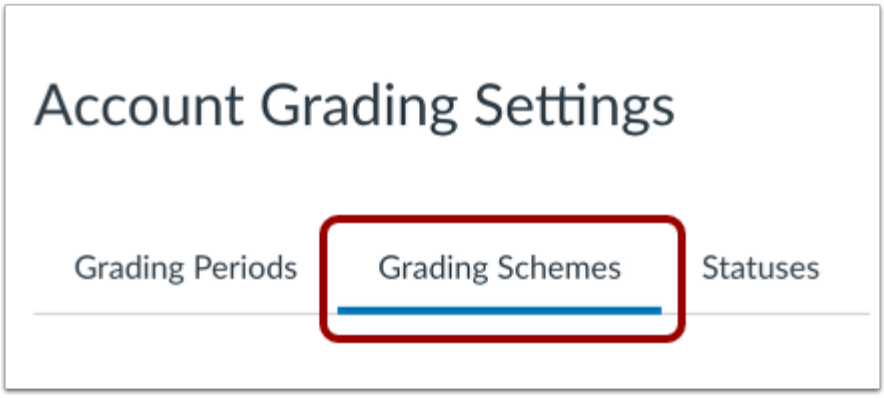
Click the **Admin** link [1], then click the name of the account [2].

Open Grading



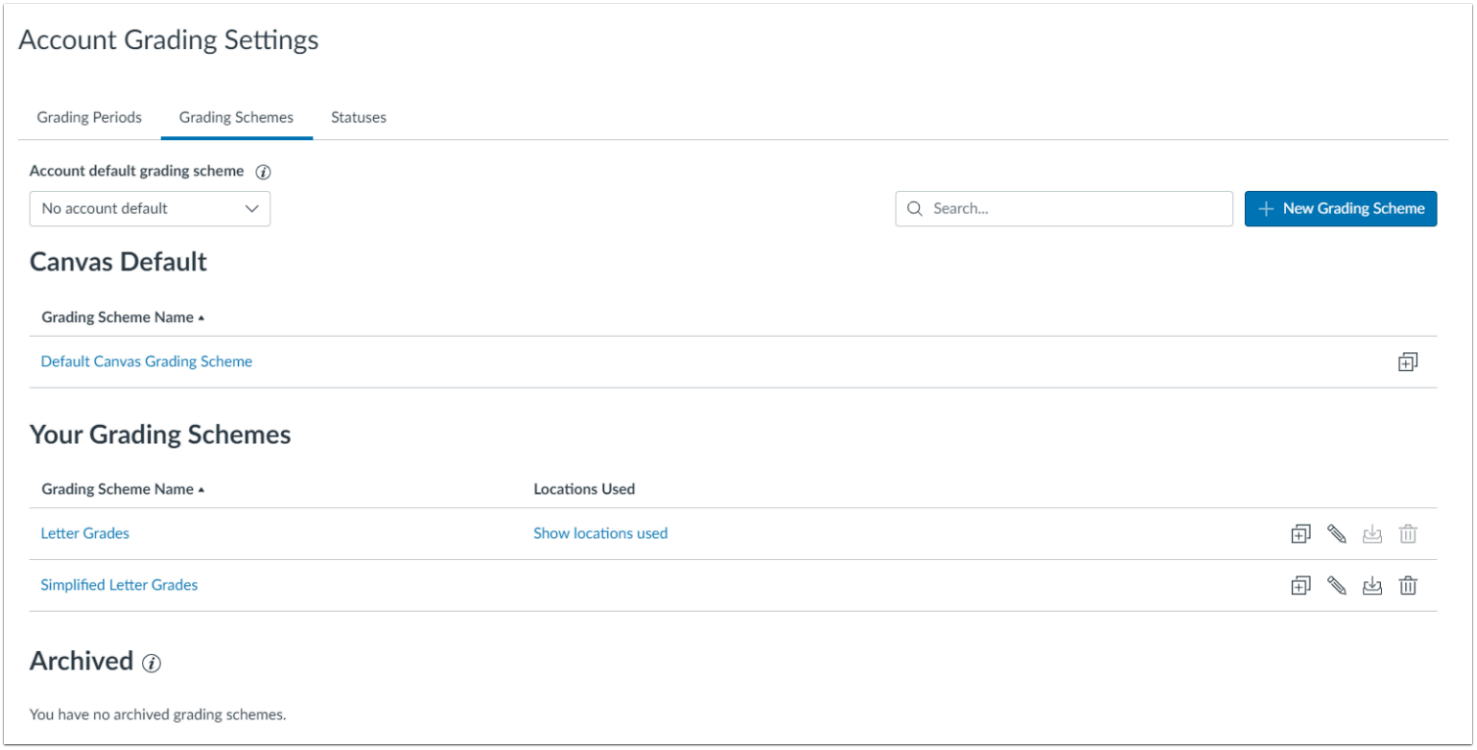
In Account Navigation, click the **Grading** link.

Open Grading Schemes



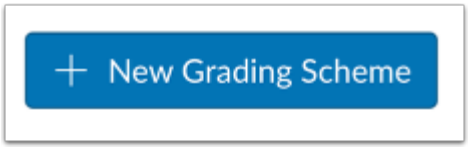
Click the **Grading Schemes** tab.

View Grading Schemes



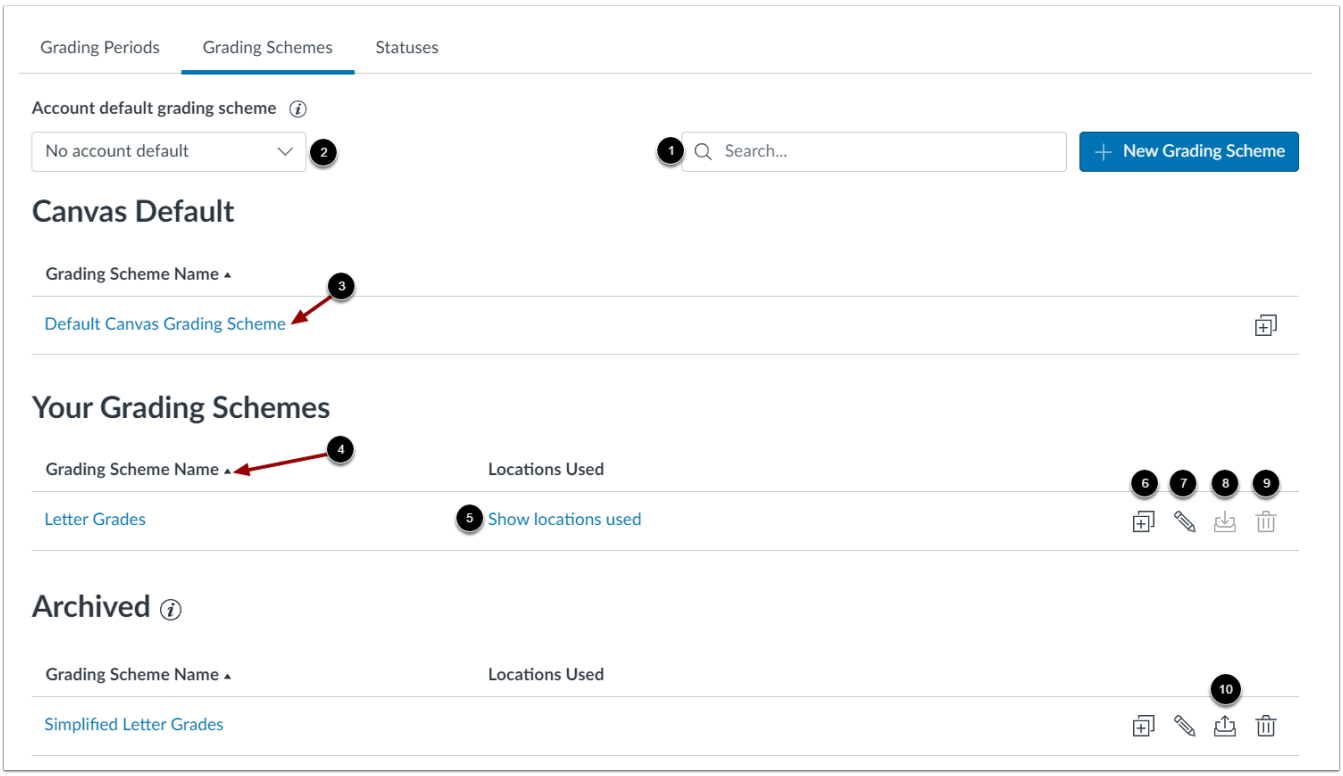
The Grading Schemes page shows all grading schemes for your account.

Add New Grading Scheme



To add an account grading scheme, click the **Add New Grading Scheme** button.

Manage Grading Schemes



To search for a grading scheme, enter the name in the **Search...** field [1].

By default, the Default Canvas Grading Scheme is used for all courses in the account. To change the default grading scheme to a different scheme, click the **Account default grading scheme** drop-down menu [2].

To open a grading scheme, click the grading scheme's name [3].

To sort grading schemes alphabetically (ascending or descending), click the **Arrow** icon [4].

To view courses where the grading scheme is used, click the **Show locations used** link [5].

To duplicate the grading scheme, click the **Duplicate** icon [6].

To edit a grading scheme, click the **Edit** icon [7].

To archive a grading scheme, click the **Archive** icon [8].

To delete a grading scheme, click the **Delete** icon [9].

To unarchive and restore a grading scheme, click the **Unarchive** icon [10].

Notes:

- Editing the name and description of grading schemes currently in use does not allow edits to percentages or points in the grading scheme.
- The account default grading scheme will be the default for all courses in the account. Individual courses and sub accounts can override it with their own defaults.
- A grading scheme established at the course level cannot be deleted, archived, or edited at the account level.
- A grading scheme created at the account level cannot be deleted, archived, or edited at the course level.
- You can only edit grading schemes that have not been used for grading.
- If a grading scheme is used to grade a student in a course, you cannot delete the scheme from the account.
- A grading scheme in use can be archived and then restored to an active state.
- An archived grading scheme cannot be leveraged in the future by a course or assignment unless the scheme is restored.
- The default Canvas grading scheme cannot be archived.
- When copying or exporting a course, archived default grading schemes are not copied or exported.

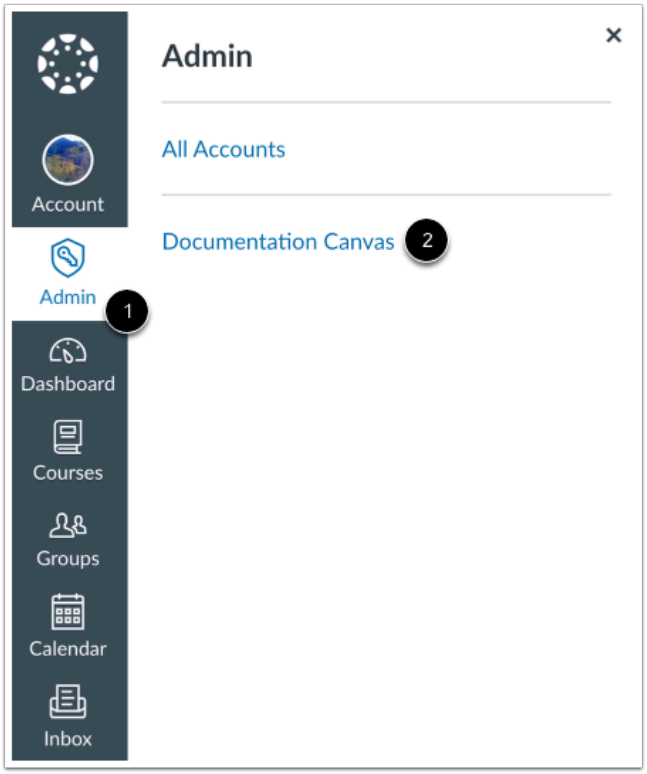
How do I add a grading scheme in an account?

As an admin, you can create grading schemes for all accounts associated with your account.

Once a grading scheme is created for your account, instructors can link the grading scheme to their courses. However, once a grading scheme has been used to assess a student, you cannot edit the grading scheme.

Note: Any grading schemes you create in an account are available to use within sub-accounts.

Open Account



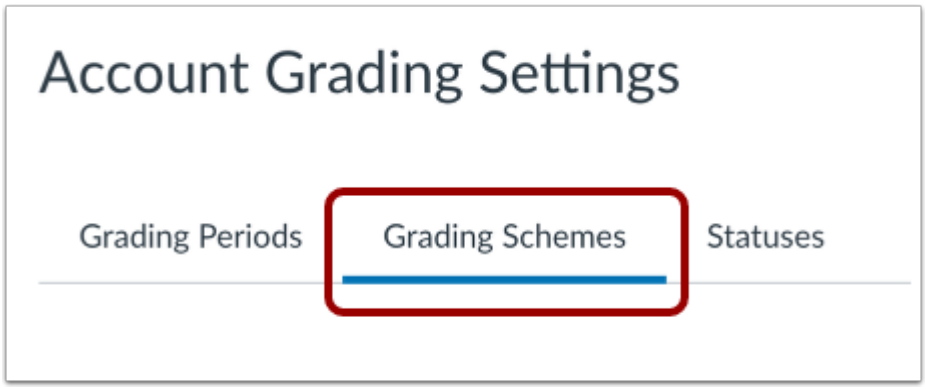
Click the **Admin** link [1], then click the name of the account [2].

Open Grading



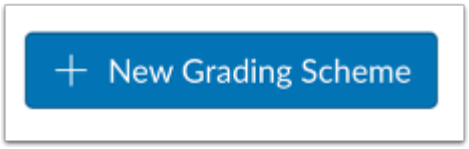
In Account Navigation, click the **Grading** link.

Open Grading Schemes



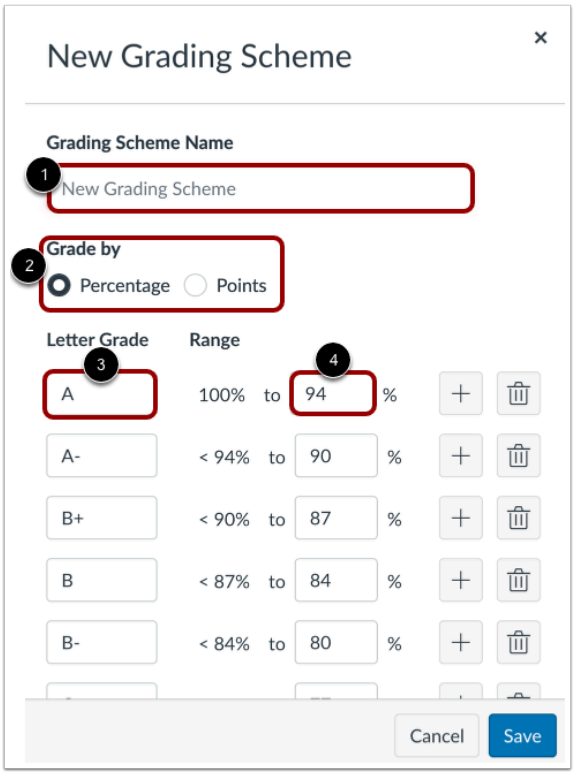
Click the **Grading Schemes** tab.

Add New Grading Scheme



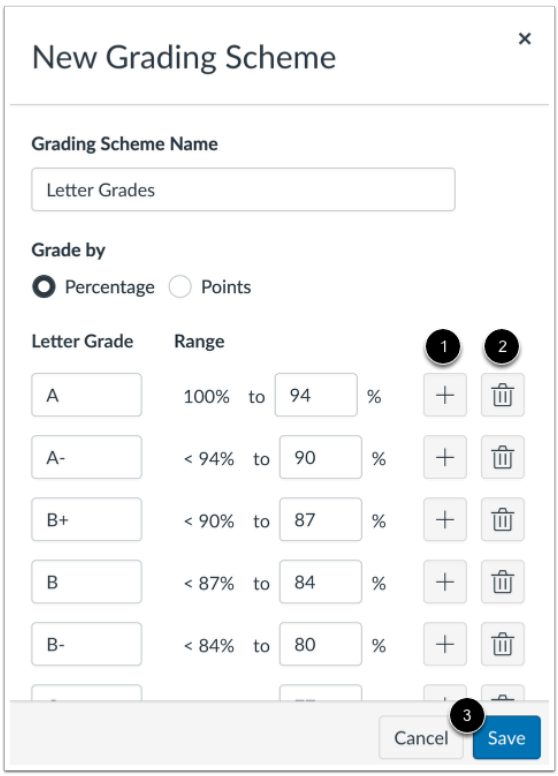
Click the **Add New Grading Scheme** button.

Edit Grading Scheme



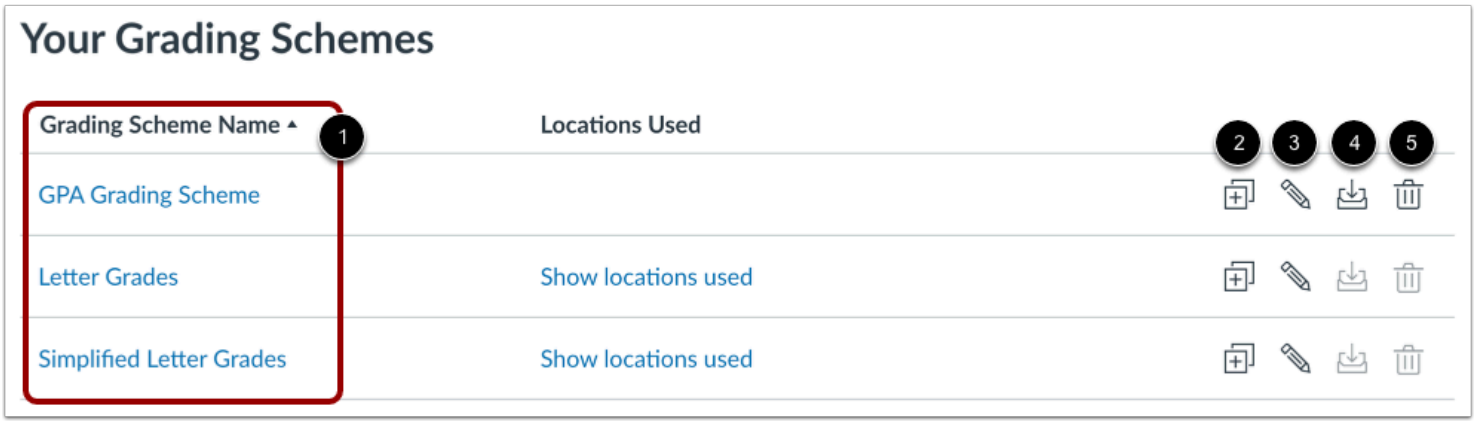
Create a title in the **Grading Scheme Name** field [1]. You can choose to have the grading scheme by percentage or points [2]. For each line item, edit the grading scheme name in the **Letter Grade** field [3]. Edit the minimum end of each individual range in the **to [Number] %** field [4].

Add Range



If you need to add ranges, click the **Add** button [1]. You can remove individual ranges by clicking the **Delete** button [2]. When you are finished editing your grading scheme, click the **Save** button [3].

Modify Grading Scheme



Your new grading scheme displays alphabetically in the Grading Scheme Name column [1].

To duplicate the grading scheme, click the **Duplicate** icon [2].

To edit the grading scheme, click the **Edit** icon [3].

To archive the grading scheme, click the **Archive** icon [4].

To delete a grading scheme, click the **Delete** icon [5].

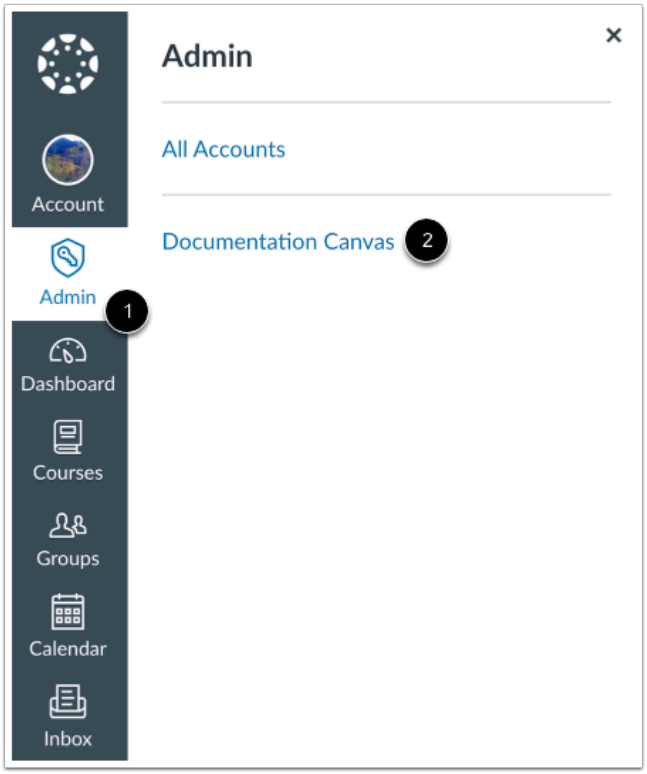
Notes:

- You can only edit and delete grading schemes that have not been used for grading.
- If grading schemes are used to grade a student in a course, the scheme can no longer be deleted from the account.

How do I duplicate a grading scheme in an account?

As an admin, you can duplicate grading schemes for all accounts associated with your account.

Open Account



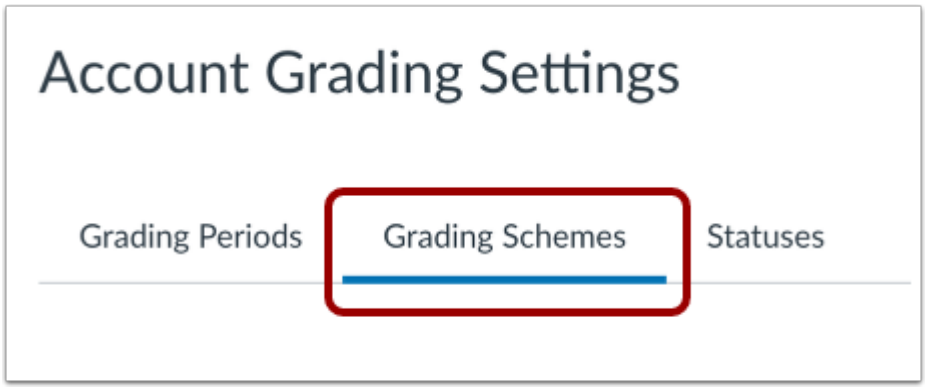
Click the **Admin** link [1], then click the name of the account [2].

Open Grading



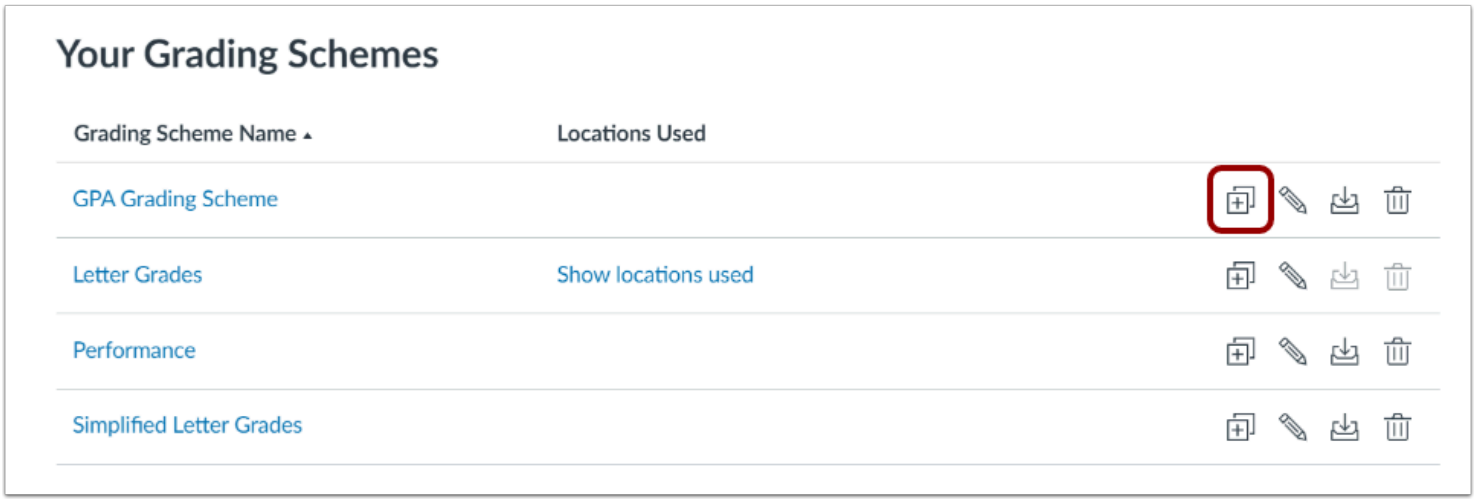
In Account Navigation, click the **Grading** link.

Open Grading Schemes



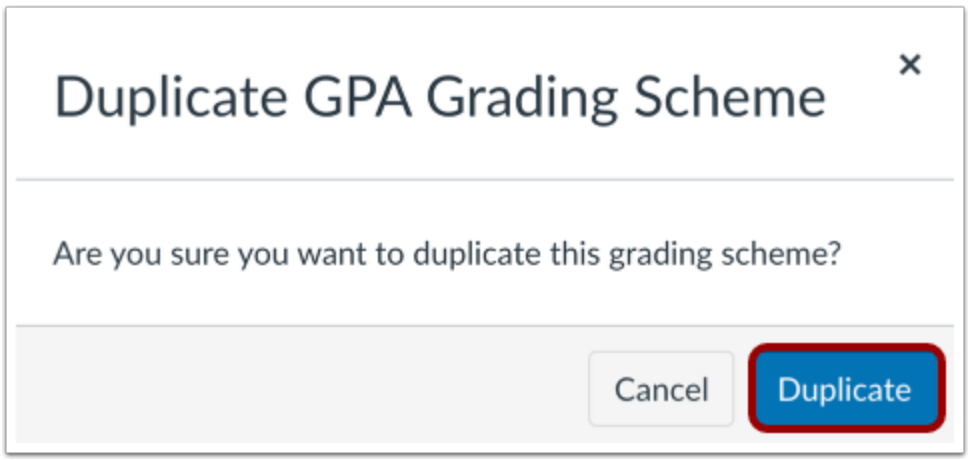
Click the **Grading Schemes** tab.

Duplicate Grading Scheme



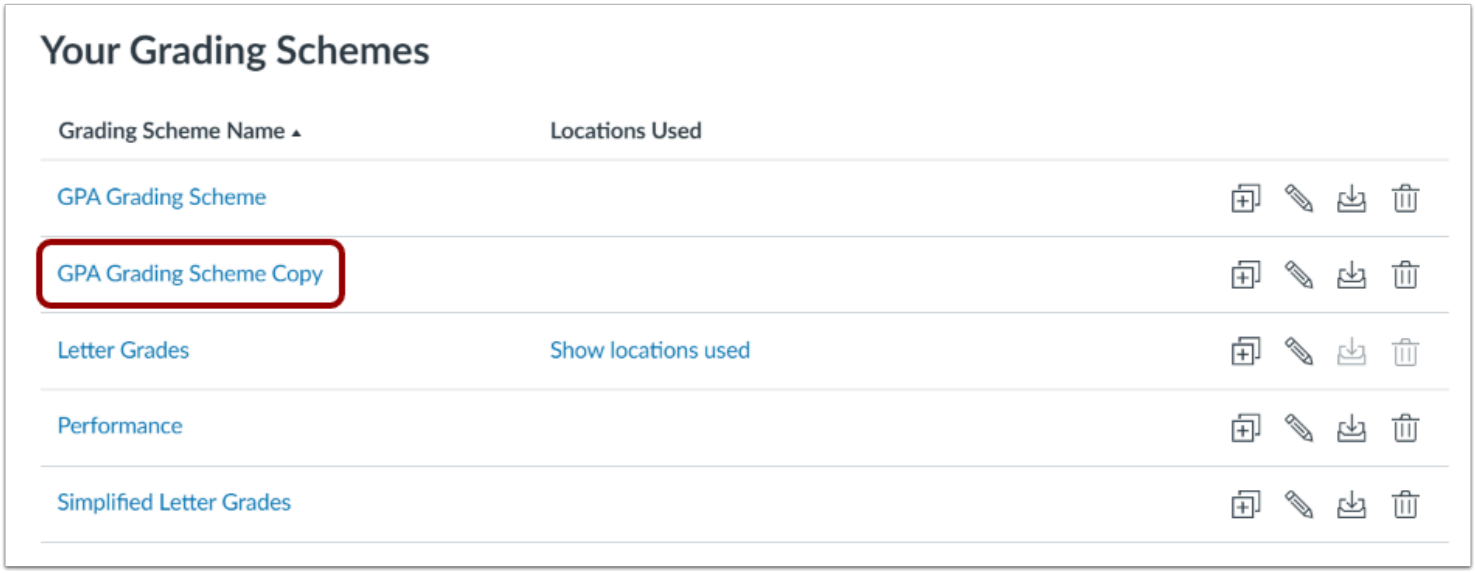
Clicking the **Duplicate** icon.

Confirm Duplication



To confirm the duplication of the grading scheme, click the **Duplicate** button.

View Grading Scheme Copy



View the grading scheme copy. You can edit and modify the grading scheme.

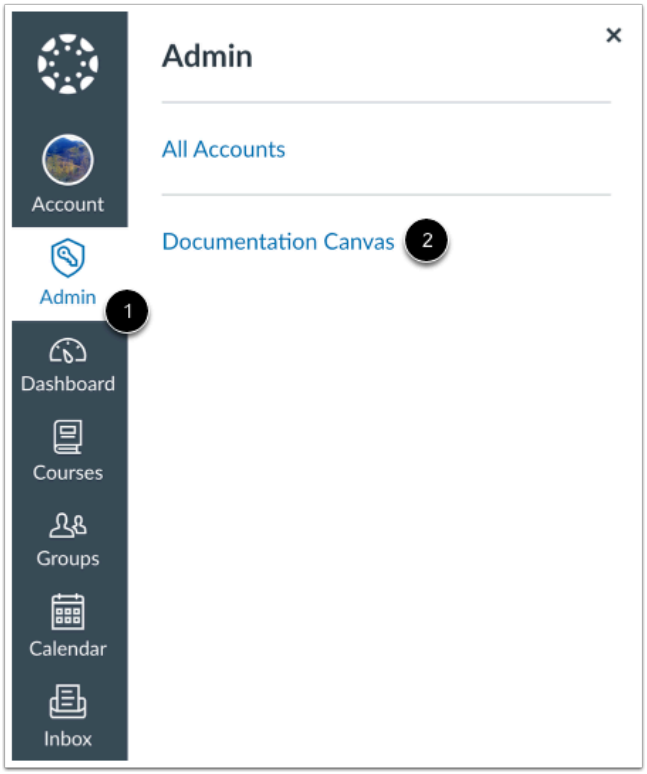
How do I edit a grading scheme in an account?

As an admin, you can edit grading schemes for all accounts associated with your account.

Notes:

- Editing the name and description of grading schemes currently in use does not allow edits to percentages or points in the grading scheme.
- If a grading scheme is in use, you can only edit its name and description, not percentages or points.

Open Account



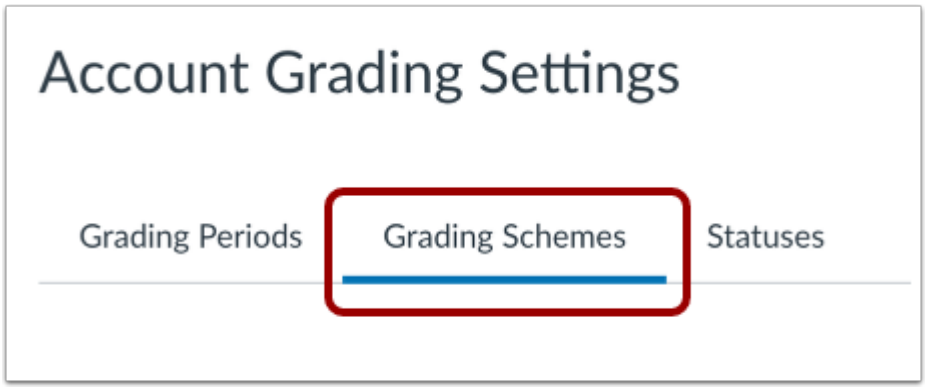
Click the **Admin** link [1], then click the name of the account [2].

Open Grading



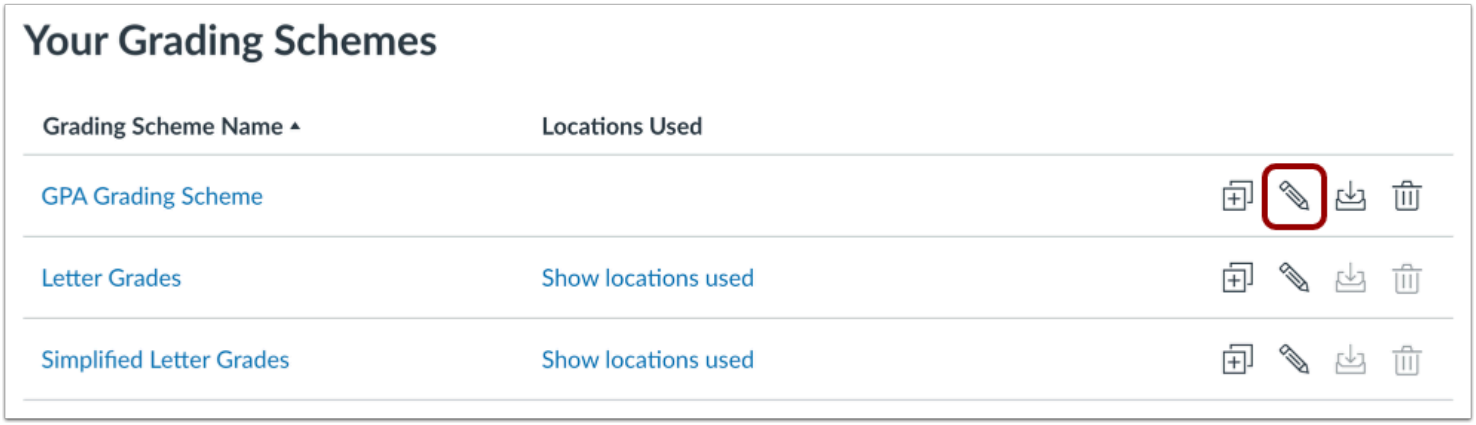
In Account Navigation, click the **Grading** link.

Open Grading Schemes



Click the **Grading Schemes** tab.

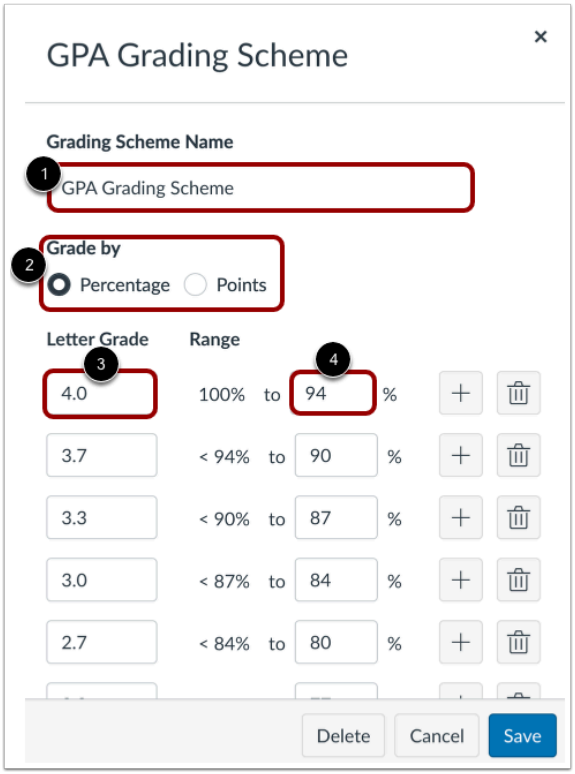
Edit Grading Scheme



To edit a grading scheme, click the **Edit** icon.

Note: If a grading scheme has been used for grading, you can only edit its name and description.

Edit Grading Scheme Details



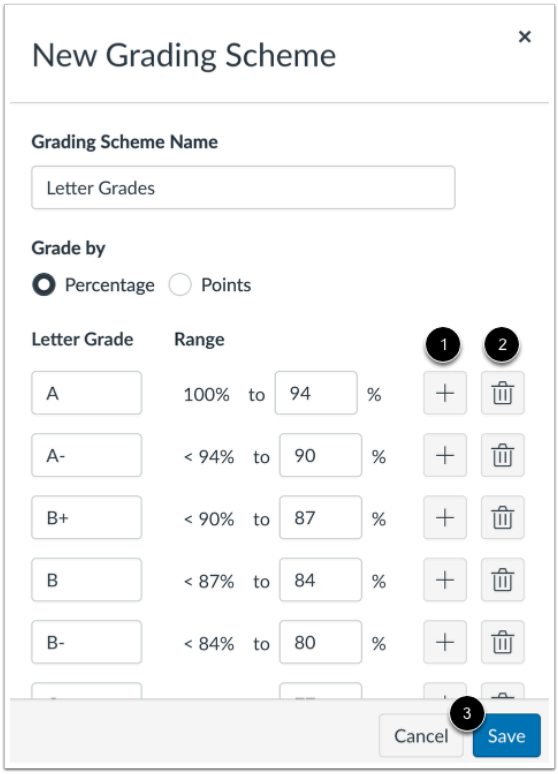
Edit the title in the **Grading Scheme Name** field [1].

You can choose to have the grading scheme by percentage or points [2].

For each line item, edit the grading scheme name in the **Letter Grade** field [3].

Edit the minimum end of each individual range in the **to [Number] %** field [4].

Add Range

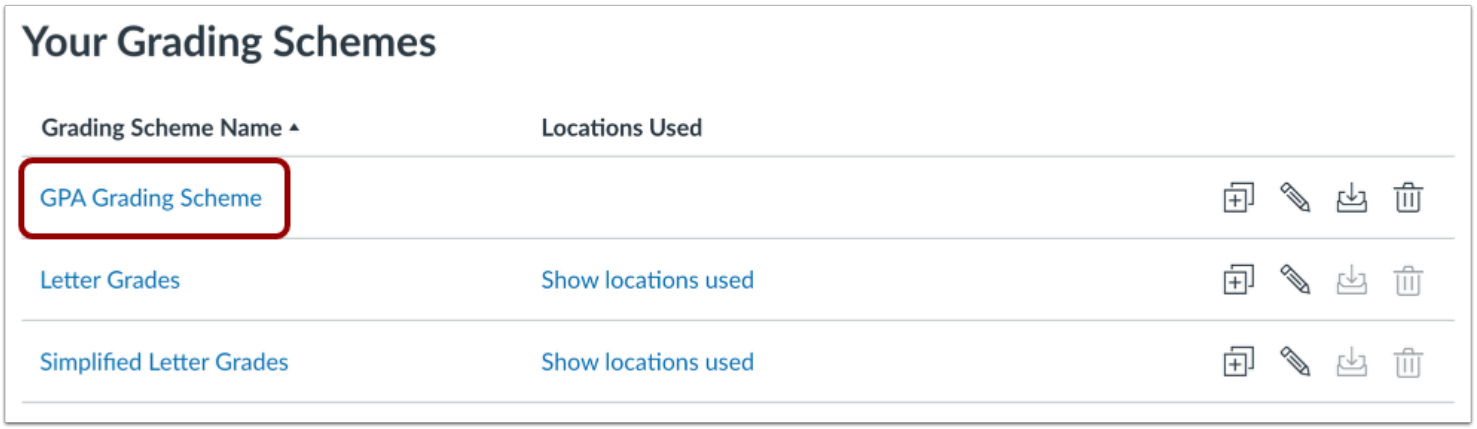


If you need to add ranges, click the **Add** button [1].

You can remove individual ranges by clicking the **Delete** button [2].

When you are finished editing your grading scheme, click the **Save** button [3].

View Grading Scheme



View the edited grading scheme.

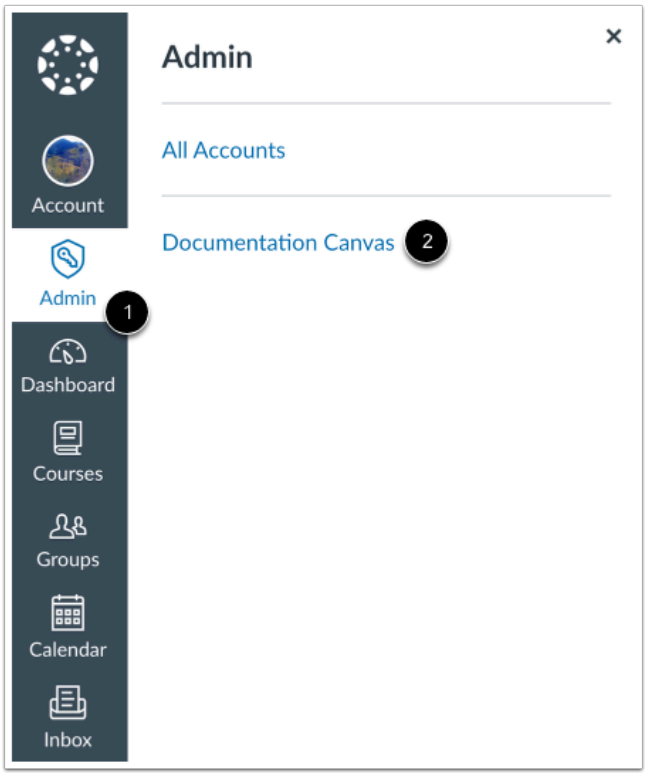
How do I archive a grading scheme in an account?

As an admin, you can archive grading schemes for all accounts associated with your account.

Notes:

- A grading scheme in use can be archived and then unarchived and restored to an active state.
- Archived grading schemes can still be used wherever they are currently in use, but they cannot be selected for new courses or assignments.
- You cannot archive the Default Canvas Grading Scheme.
- When copying or exporting a course, archived default grading schemes are not copied or exported.

Open Account



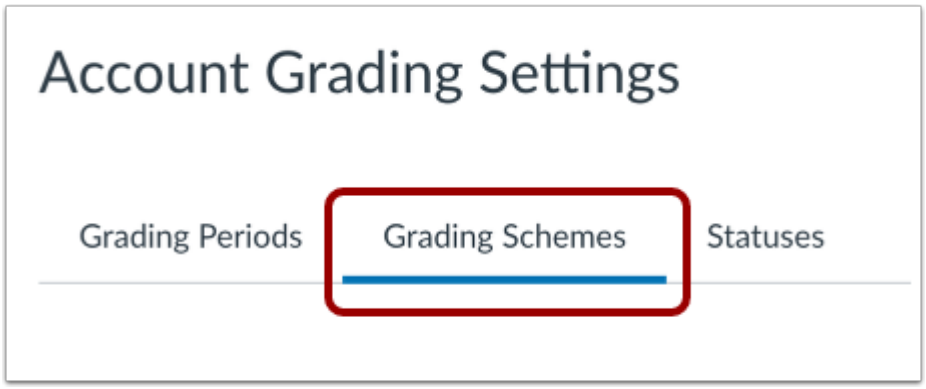
Click the **Admin** link [1], then click the name of the account [2].

Open Grading



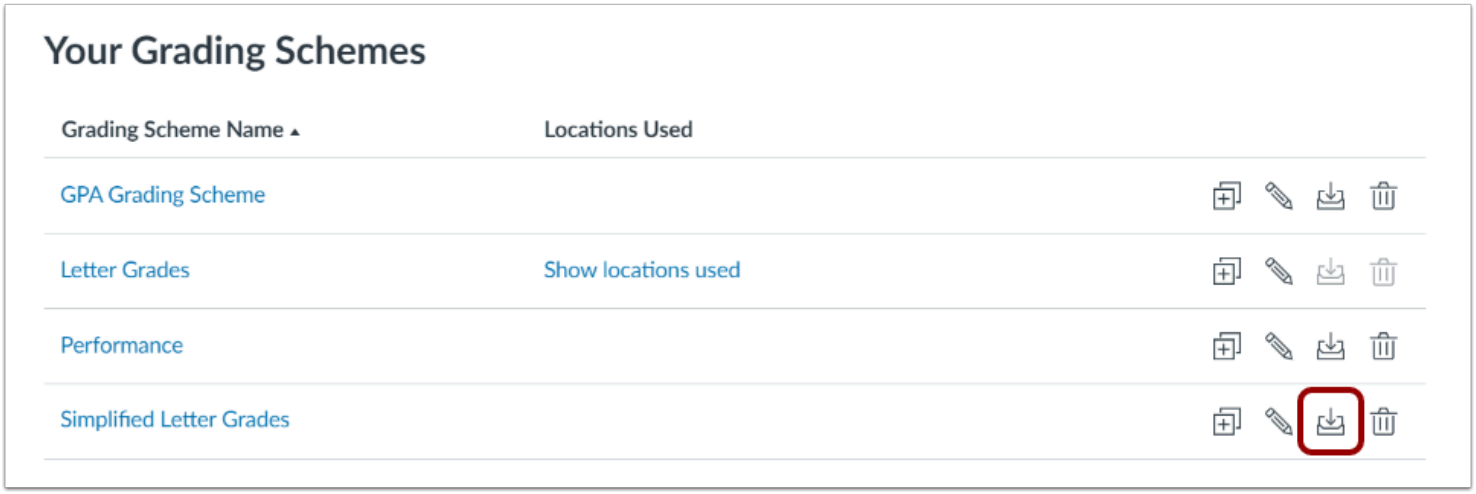
In Account Navigation, click the **Grading** link.

Open Grading Schemes



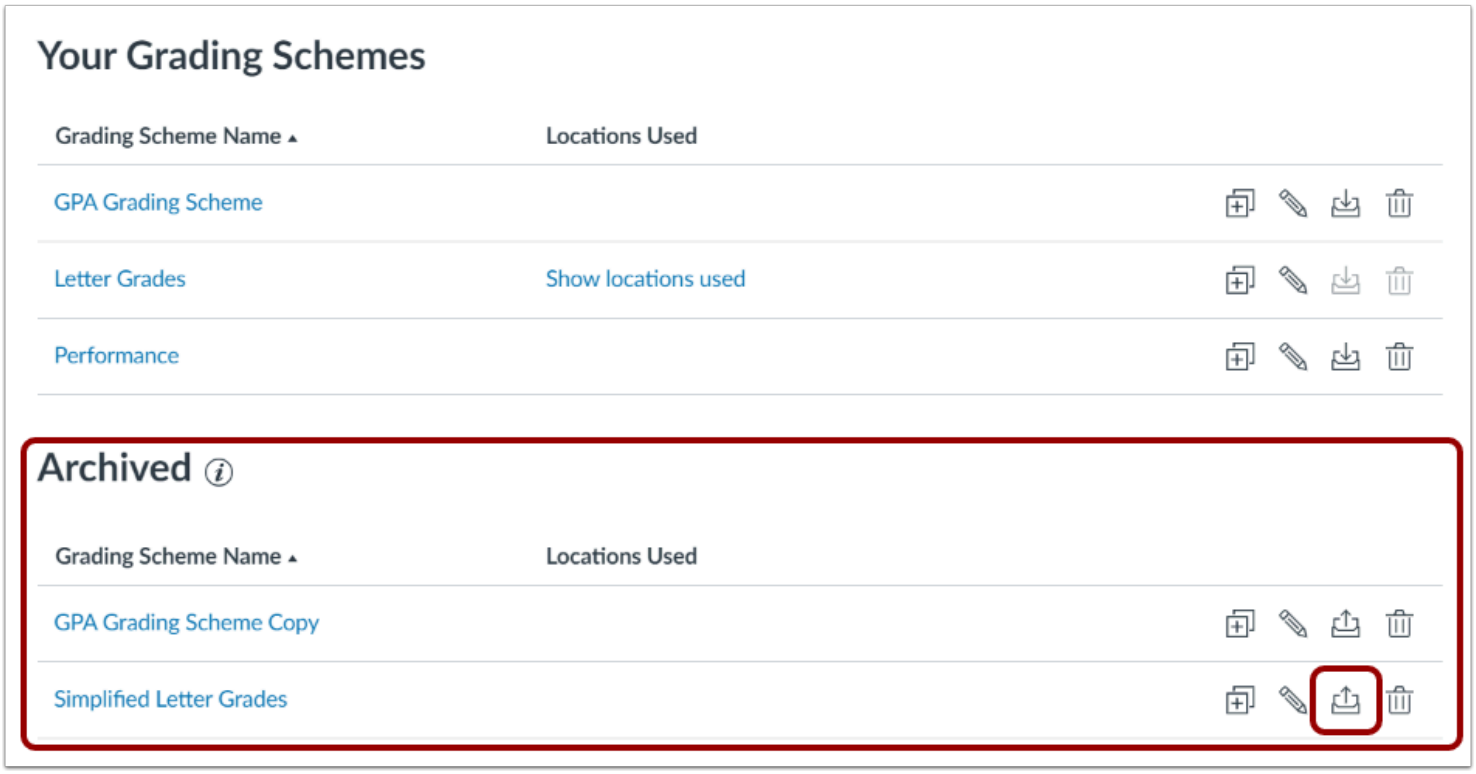
Click the **Grading Schemes** tab.

Archive Grading Scheme



To archive a grading scheme, click the **Archive** button.

View Archived Grading Scheme



View the archived grading scheme. To unarchive and restore the grading scheme, click the **Unarchive** icon.

Notes:

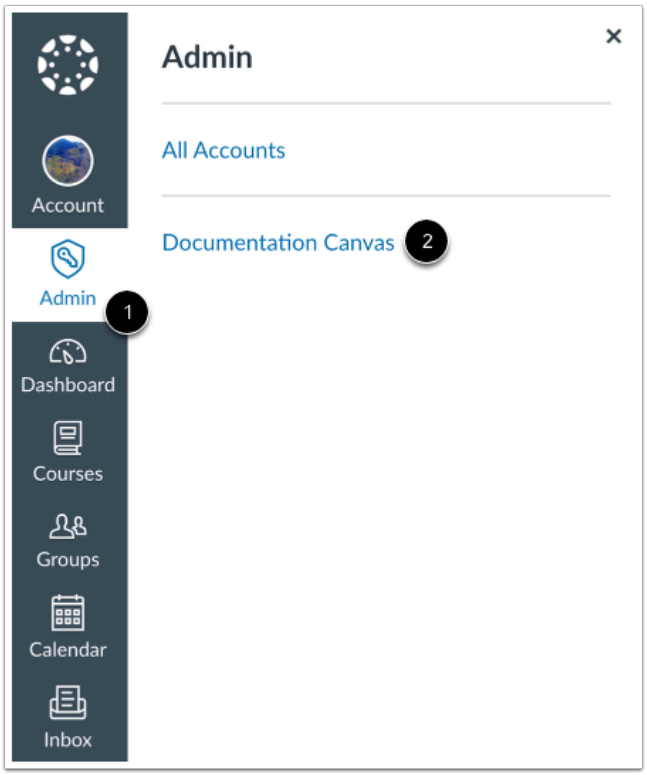
- A grading scheme in use can be archived and then unarchived and restored to an active state.
- Archived grading schemes can still be used wherever they are currently in use, but they cannot be selected for new courses or assignments.
- You cannot archive the Default Canvas Grading Scheme.
- When copying or exporting a course, archived default grading schemes are not copied or exported.

How do I view grading periods in an account?

As an admin, you can manage grading periods for your institution. Each grading period set applies to the entire institution, including subaccounts. All courses associated with a term in a grading period automatically inherit the term's grading periods.

As grading periods do not directly affect any course assignments, grading periods can be deleted or their start and end dates can be changed. However, changes should generally be made before a term begins. Changing grading period dates during a term will affect grade totals.

Open Account



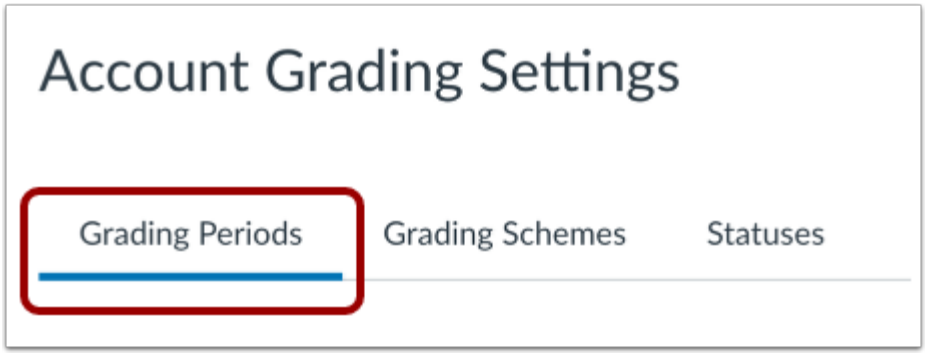
Click the **Admin** link [1], then click the name of the account [2].

Open Grading



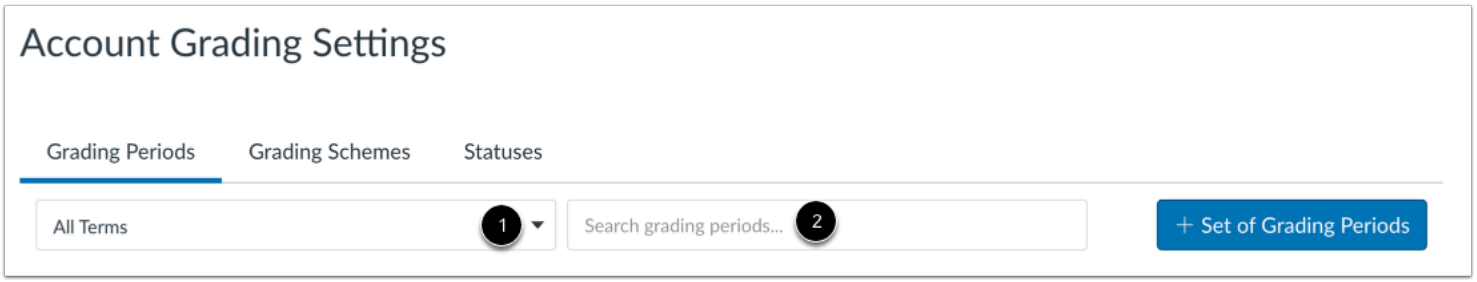
In Account Navigation, click the **Grading** link.

Open Grading Periods



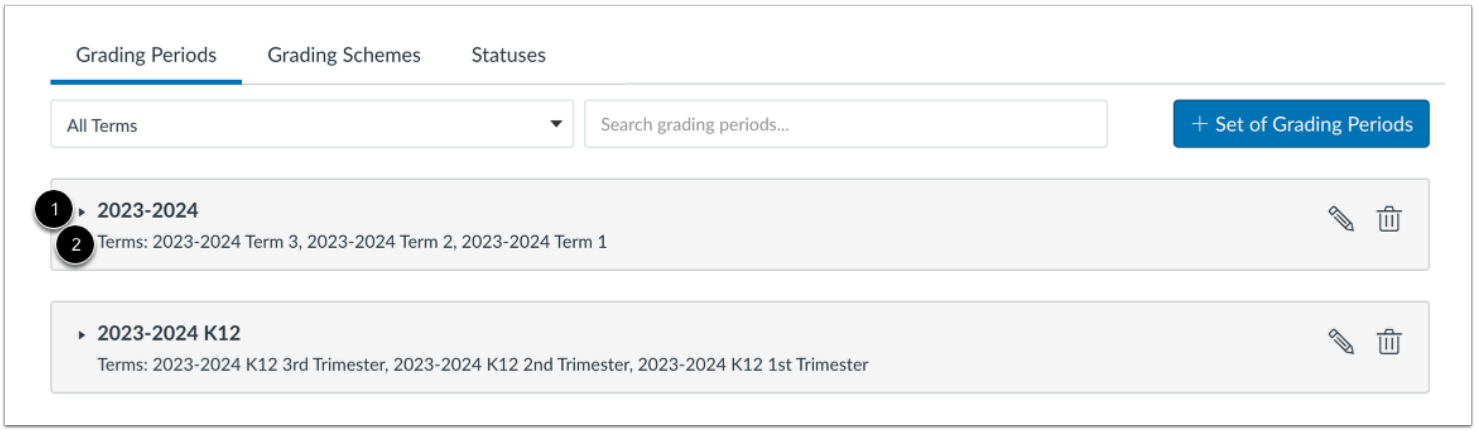
Click the **Grading Periods** tab.

Filter Grading Period Sets



Grading periods can be filtered by viewing a term in the **Terms** drop-down menu [1], or by searching for the name of a term or grading period in the search field [2].

View Grading Period Sets



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

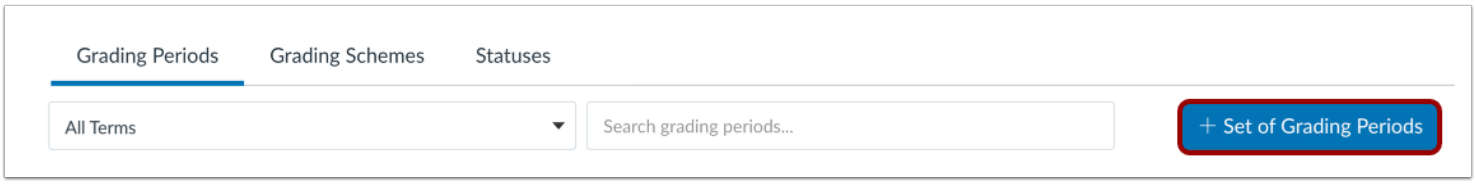
Each grading period set shows the name of the grading period set [1] and the associated terms [2].

Manage Grading Period Sets



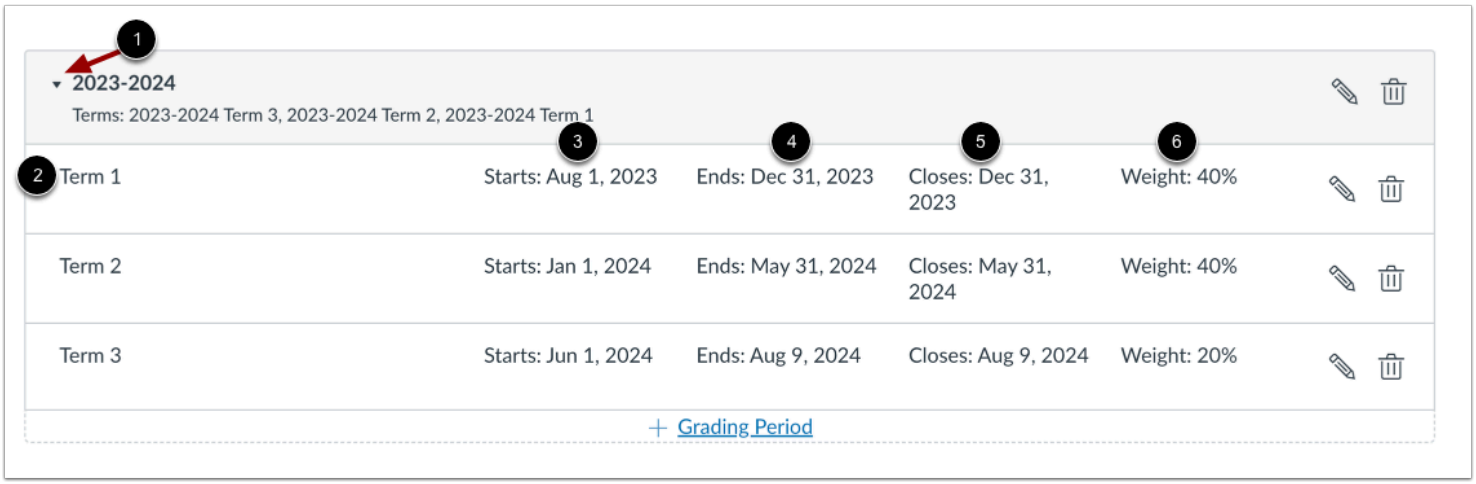
To edit the name or term(s) for a grading period set, click the **Edit** icon [1]. To delete the grading period set, click the **Delete** icon [2].

Add Grading Period Set



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

View Grading Periods



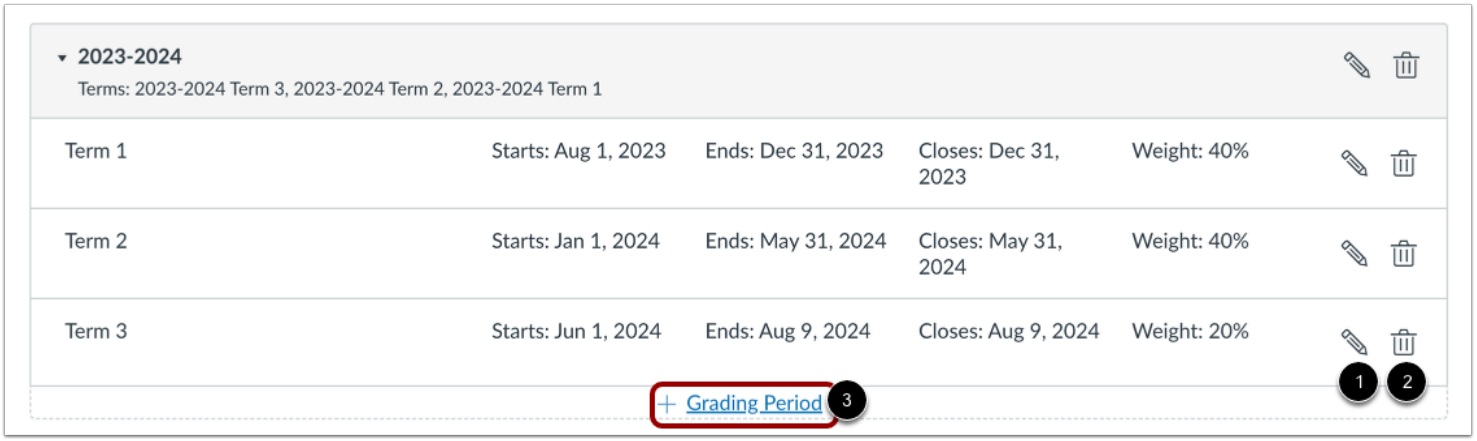
To view a grading period, expand the grading period set by clicking the arrow next to the set name [1].

Each grading period shows the name of the grading period [2], the start date [3], the end date [4], and the close date [5].

If your grading periods are weighted, you can view each grading period's weighted percentage [6]. The percentages for the entire grading period set can total any number and does not have to add up to 100%.

Note: Beneath the date fields, Canvas displays the time zone date and time according to context. If you manage an account in a time zone other than your local time zone, the account and local times are displayed for reference.

Manage Grading Periods



To edit dates for a grading period, click the **Edit** icon [1]. To delete a grading period, click the **Delete** icon [2].

To add another grading period, click the **Add Grading Period** link [3].

View Concluded Grading Periods



Once a grading period has concluded, existing grading period sets should never be edited and reused for future terms. Future terms should be added to a new grading period set, with dates defined specifically for the future term. As term dates most commonly last an entire year, new grading period sets should only have to be created annually.

Retaining concluded terms and their associated grading periods ensures accuracy in grading reports.

How do I add grading periods in an account?

You can create new grading periods for all courses within your institution. Grading periods can only be created at the account level.

Concluded grading periods should never be edited and reused for future terms. Future terms should be added to a new grading period set, with dates defined specifically for the future term. Retaining concluded terms and their associated grading periods ensures accuracy in grading reports.

Grading Periods

Grading periods are created within a grading period set and associated with a term. All courses associated with the term automatically inherit the grading periods created for the term. Each term can only be associated with one grading period set, but multiple terms can be in the same grading period set. Multiple terms can be added to a grading set if the courses in the terms use the same grading periods. Grading periods can be added to the grading period set in any order and are organized by start date. Start and end dates cannot overlap in a grading period.

Grading periods can also be weighted. When this option is enabled, the overall grade for each term is calculated by taking the final grades for each grading period and applying each grading period's weight.

In the course grading scheme, instructors can view the grading periods associated with the course term.

Close Dates

You can also add a close date to grading periods, which allows you to extend the time that instructors can edit grades after the grading period has ended. By default, the close date is the same as the end date. However, the close date can be edited to any date after the end date.

At the course level, Canvas validates assignments against closed grading periods in Canvas. Canvas validates assignments against closed grading periods in the Gradebook and SpeedGrader and various settings and options in the Assignments, Discussions, and Quizzes feature areas. For each grading period, the close date is the same as the end date, unless the close date is changed by an admin. Instructors cannot edit any assignments with due dates in a closed grading period.

Multiple Terms and Grading Periods

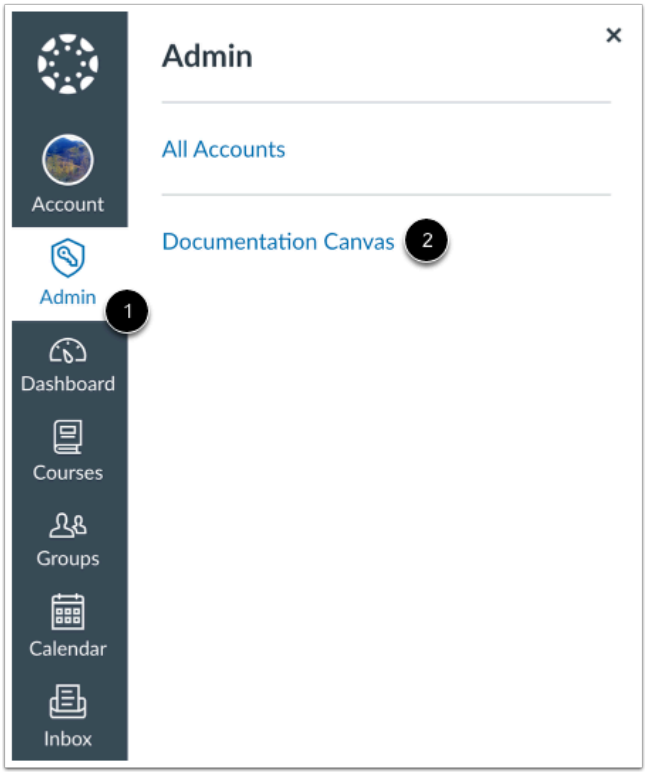
If your institution requires different grading periods to be active at the same time, you can create additional terms and add them to a new or current grading period set. For instance, if your district needs grading periods for both semesters and quarters, you can create a new term for each institution and place the terms within different grading period sets—one created for semesters and one created for quarters. In the Terms page, each term will display its associated grading period.

All courses in a term are associated with the grading period. If your institution requires some courses in a term to not be associated with a grading period, you must create a separate term for those courses that is not associated with a grading period.

Notes:

- Once a term is associated with a grading period, the name of the grading period displays with the term in the Terms page.
- Sub-accounts and courses display grading periods in a read-only state; changes can only be made at the account level.

Open Account



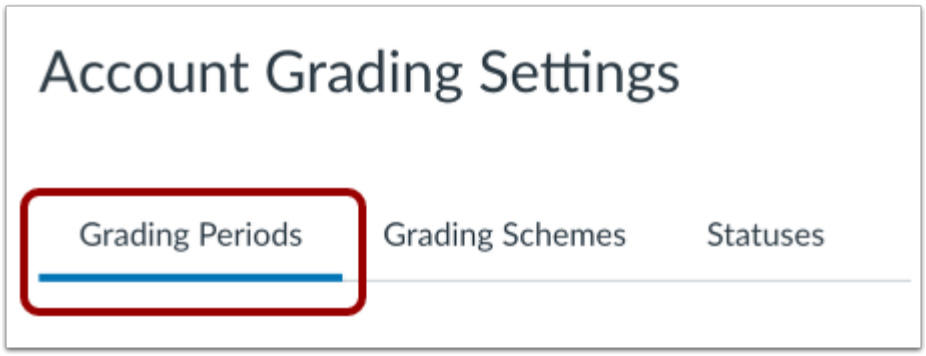
Click the **Admin** link [1], then click the name of the account [2].

Open Grading



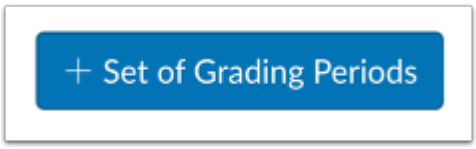
In Account Navigation, click the **Grading** link.

Open Grading Periods



Click the **Grading Periods** tab.

Add Set of Grading Periods



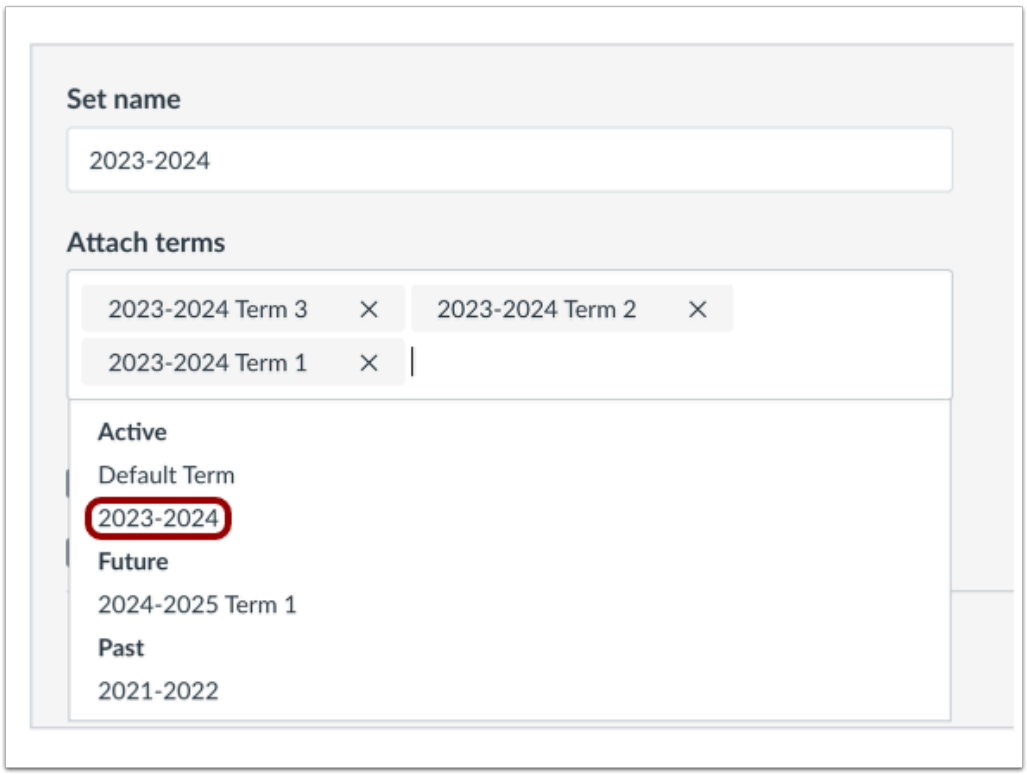
Click the **Add Set of Grading Periods** button.

Create Set Name



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

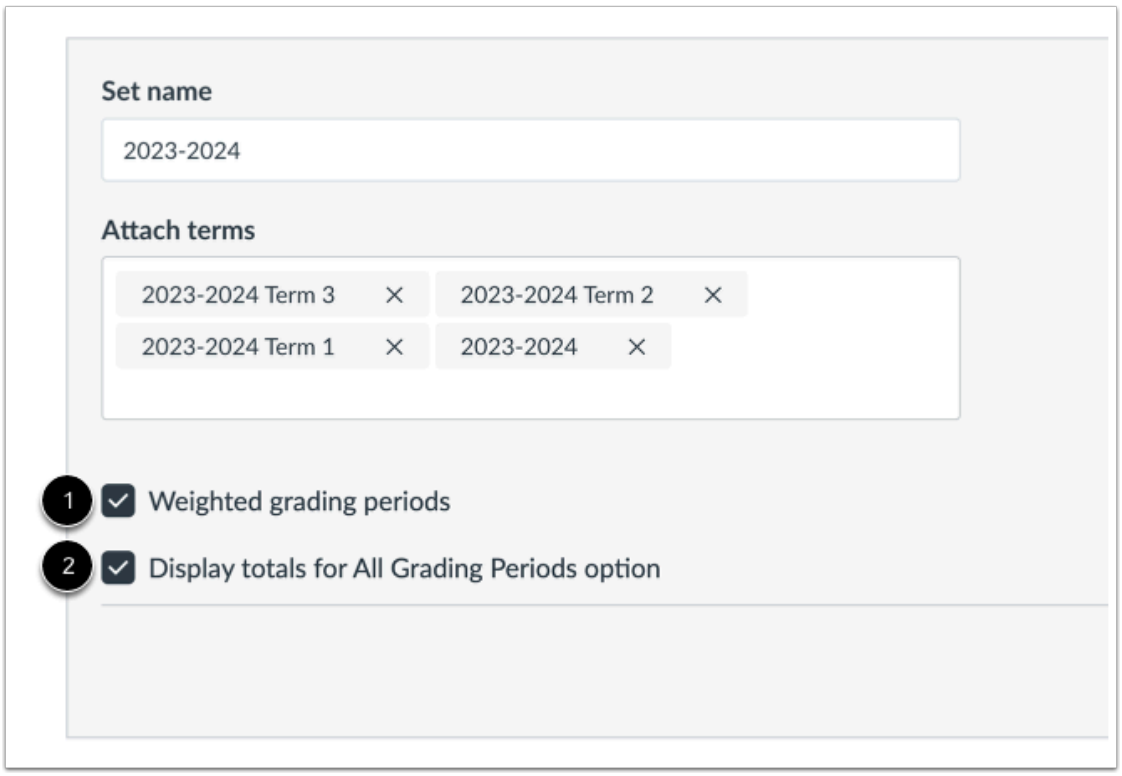
Attach Terms



If you want to attach an existing term to the grading period set, click the **Attach Terms** field. In the drop-down list, select the term(s) you want to associate with the grading period set. Terms are sorted by date; once a term is selected, the term is removed from the drop-down list. Terms can only be associated with one grading period set.

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

Set Grading Period Options

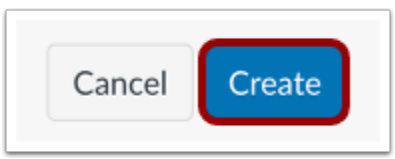


You can also choose to set two options for the grading period.

If you want to create each grading period with an individual weight, click the **Weighted grading periods** check box [1].

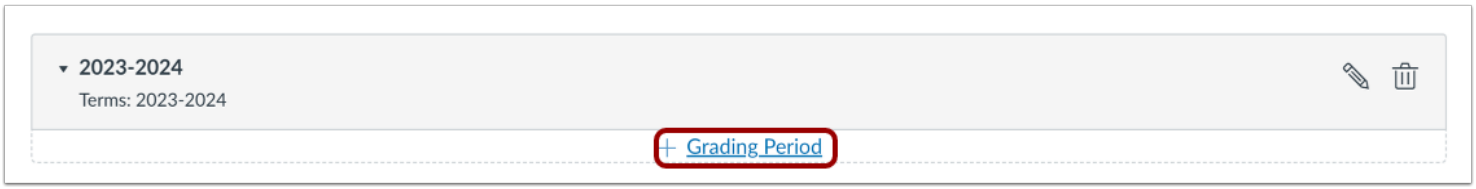
When users view the All Grading Periods option in the grading periods drop-down menu, you can allow them to view total grades and any assignment group totals in the course by clicking the **Display totals for All Grading Periods option** check box [2]. If this check box is not selected, users can still view the total grade within an individual grading period.

Create Grading Period Set



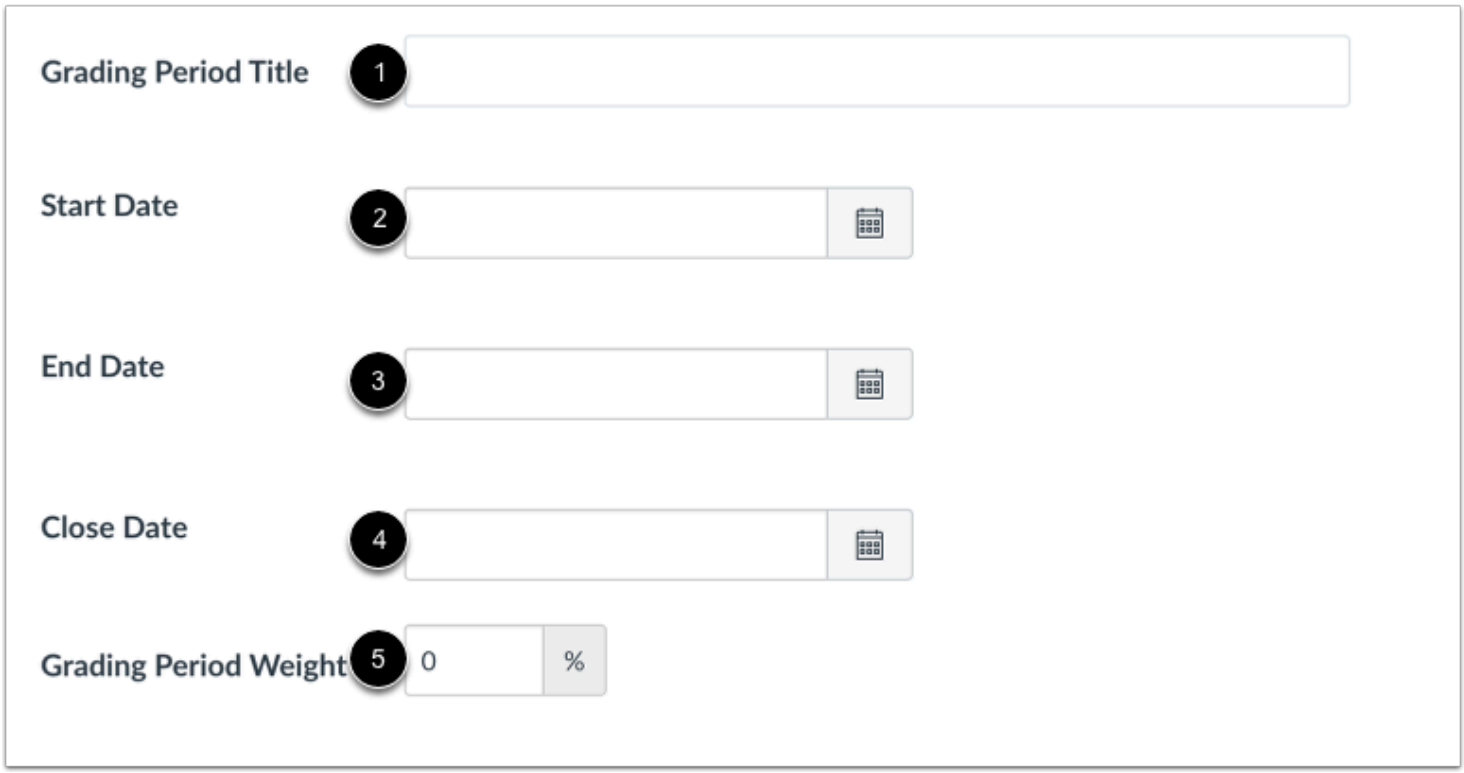
Click the **Create** button.

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.

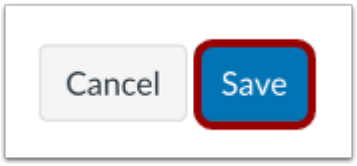
In the **Start Date** field [2], enter a start date for the grading period. Start dates default to 12:00 a.m. You can also use the calendar icon to select a date.

In the **End Date** field [3], enter or select an end date for the grading period. End dates default to 11:59 p.m.

The **Close Date** [4] defaults to the end date. To change the close date, enter or select a new close date.

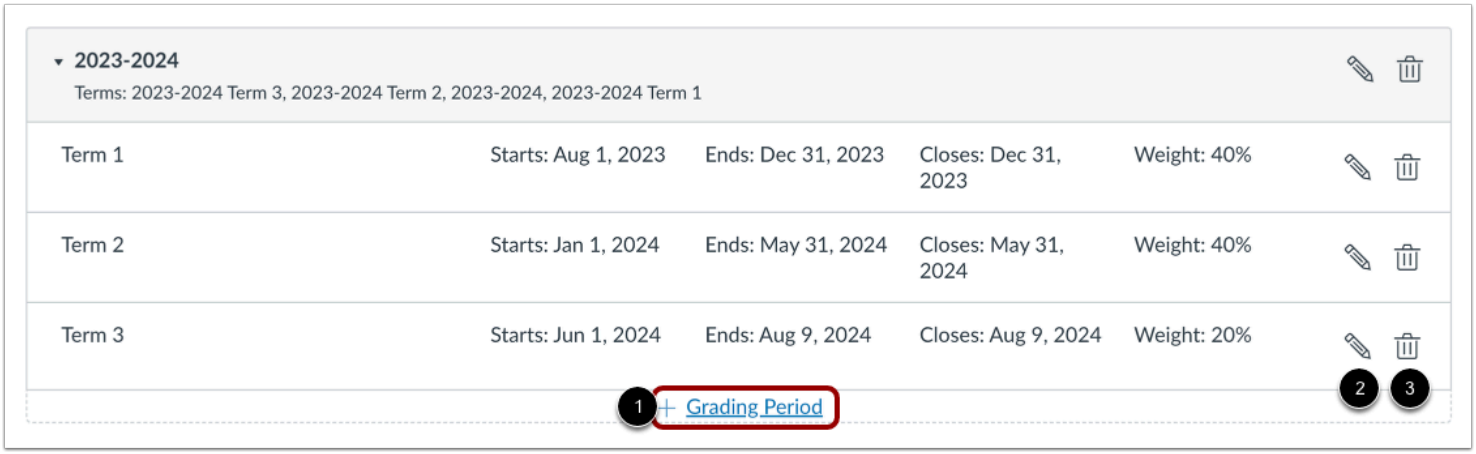
If you enabled weighted grading [5], enter the preferred weighted percentage for the grading period. Grading periods can include any percentage greater than zero, and the total sum of all grading periods does not have to equal 100%.

Save Grading Period



Click the **Save** button.

Manage Grading Periods



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].

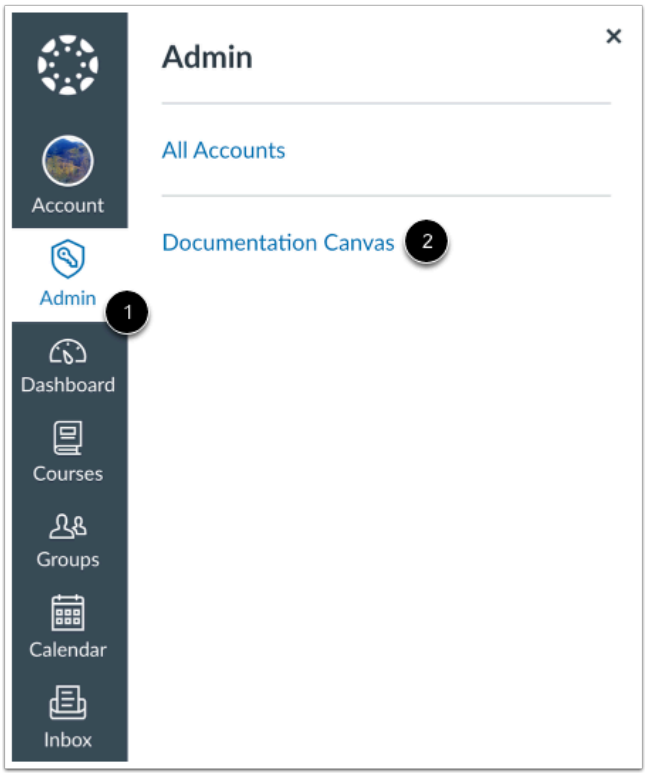
How do I manage gradebook statuses in an account?

As an admin, you can manage the colors of the standard gradebook statuses and create custom gradebook statuses for all accounts associated with your account.

Custom statuses are supported in Gradebook imports and SIS exports. Custom Final Grade Override statuses are supported in Gradebook exports.

When a missing label is manually applied, the missing label is removed by a new submission or manual removal. Entering a score does not remove a manually-applied missing label.

Open Account



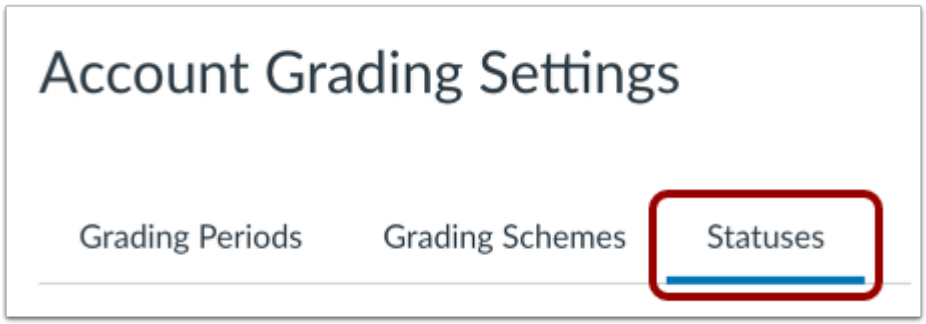
Click the **Admin** link [1], then click the name of the account [2].

Open Grading



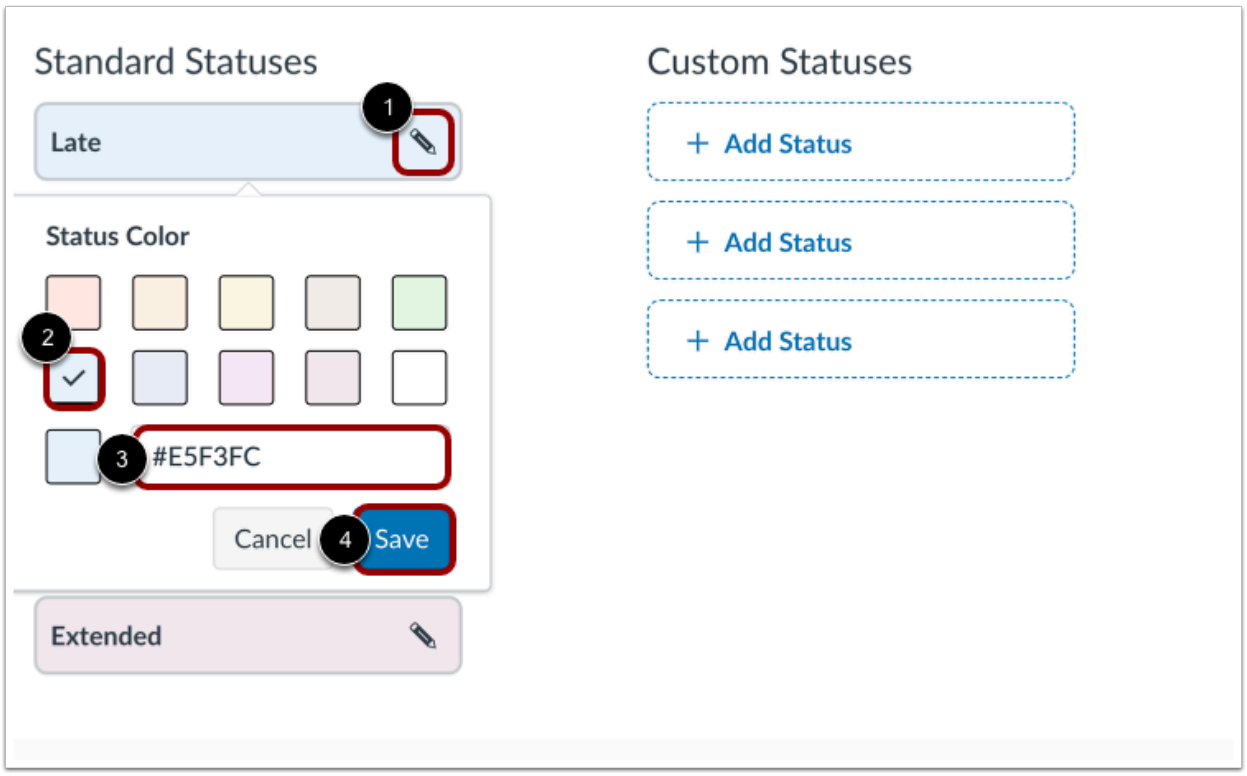
In Account Navigation, click the **Grading** link.

Open Grading Statuses



Click the **Statuses** tab.

Modify Standard Grading Statuses



To change the standard status colors, click the **Edit** icon [1].

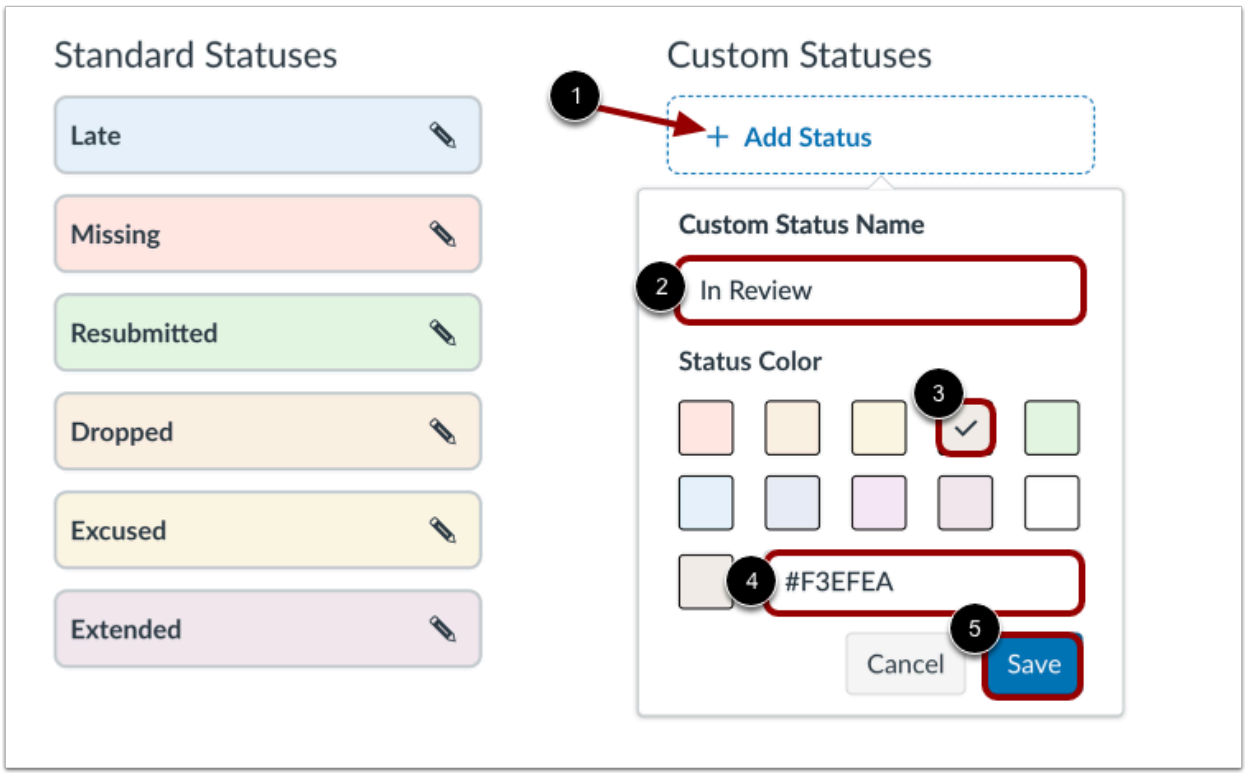
Select the new color for the status. The check mark indicates the selected color [2], and the hex color code displays in the text field [3].

If you want to use a color not shown in the window, you can enter the color's hex code directly in in the text field. The hex field will display a warning icon if the hex code is not valid.

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

Note: The Extended status is not a default standard status and must be enabled by your Customer Support Manager.

Create Custom Status



To create a custom status, click the **Add Status** link [1].

In the **Custom Status Name** field, enter a name for the status [2].

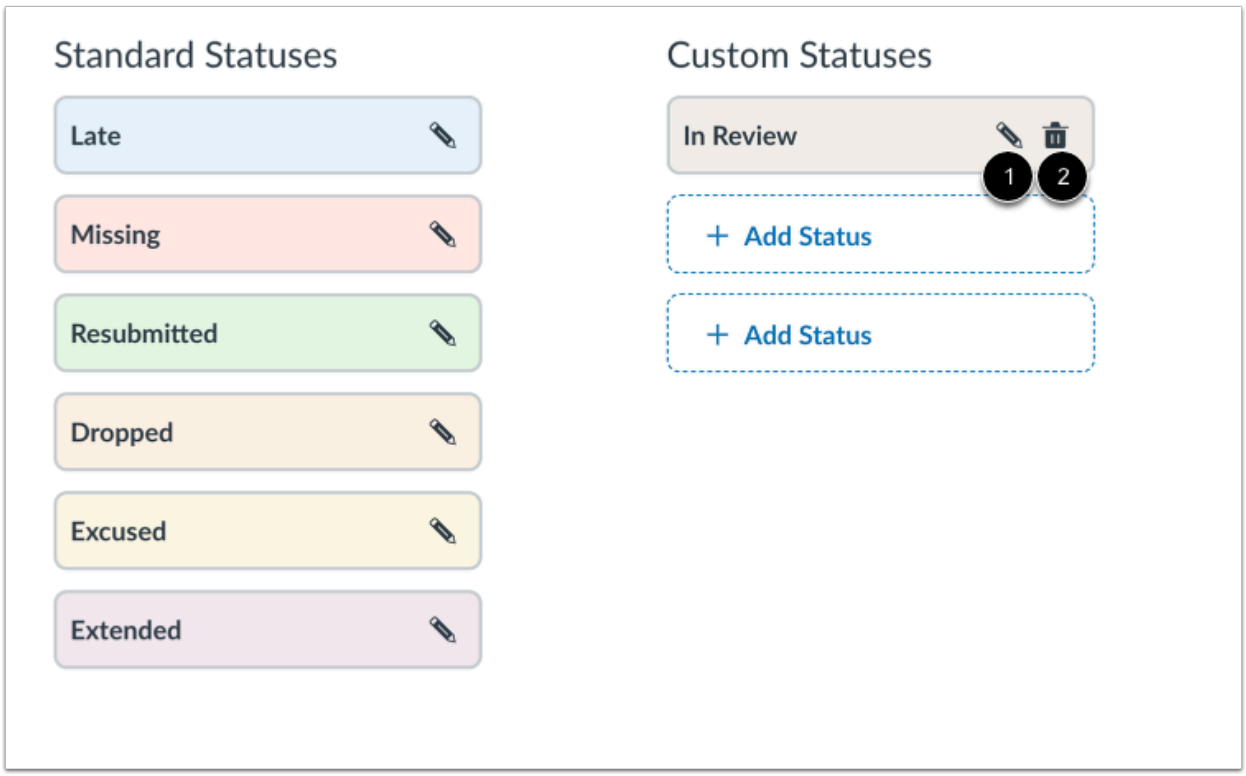
Select the new color for the status. The check mark indicates the selected color [3], and the hex color code displays in the text field [4].

If you want to use a color not shown in the window, you can enter the color's hex code directly in in the text field. The hex field will display a warning icon if the hex code is not valid.

Click the **Save** button [5].

Note: Once a custom status is created, it is automatically added to the Gradebook.

Modify Custom Status



To edit the custom status, click the **Edit** icon [1]. To remove the custom status, click the **Delete** icon [2].

Integrations

How do I enable Equella for an account?

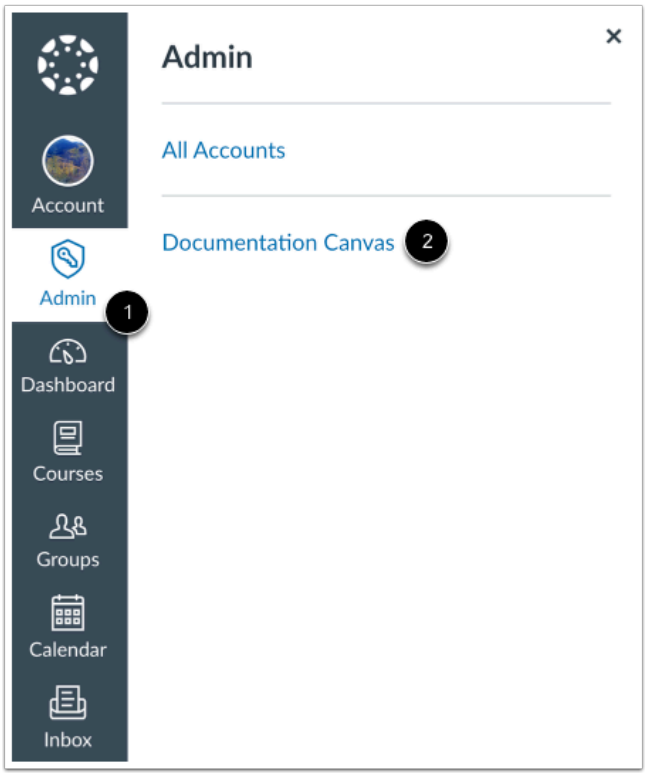
Equella is a digital repository that provides a platform for teaching and learning.

To integrate Equella with your Canvas account, you will need to know your Equella endpoint URL.

Notes:

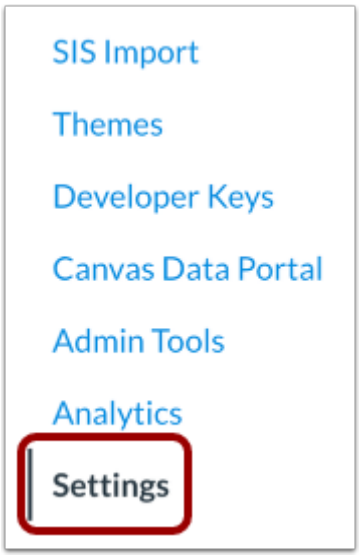
- You must have an Equella account before you can enable Equella in Canvas.
- Child consortium accounts cannot manage Equella settings.

Open Account



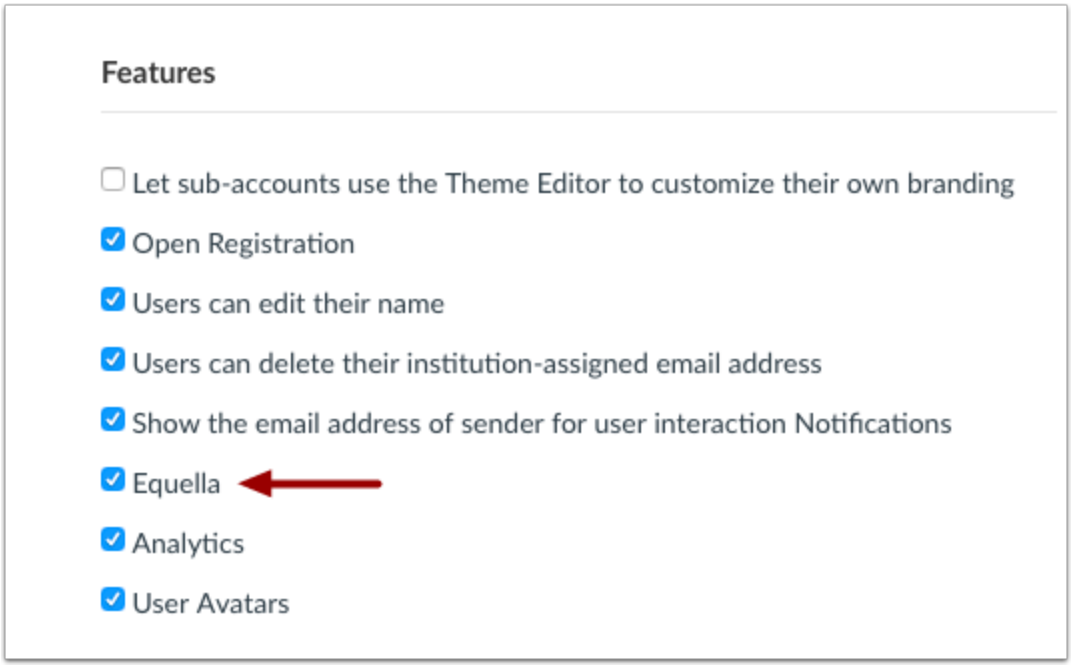
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



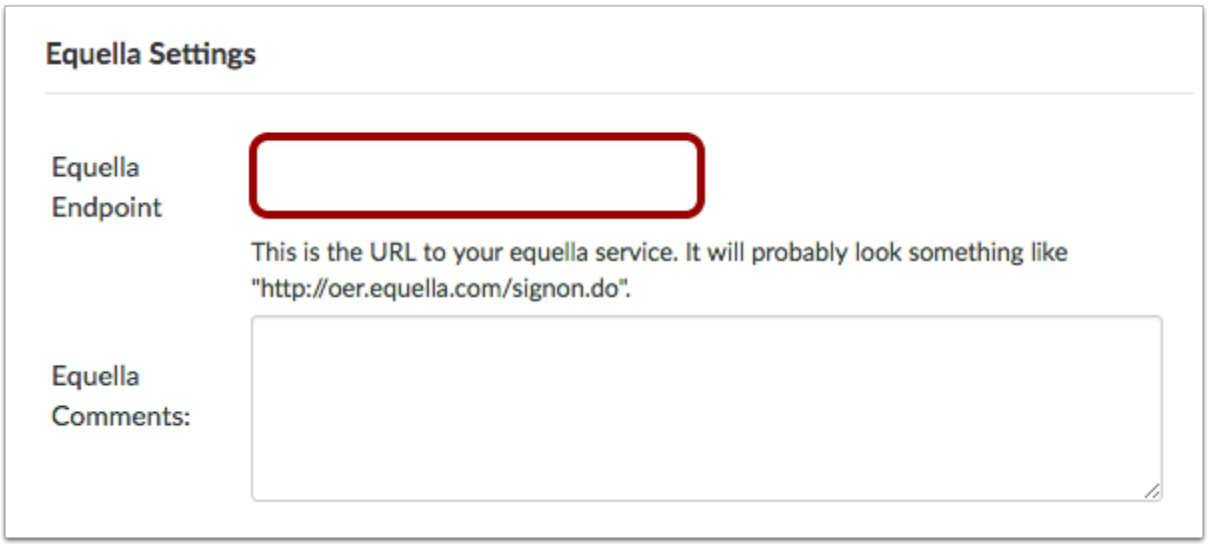
In Account Navigation, click the **Settings** link.

Enable Equella



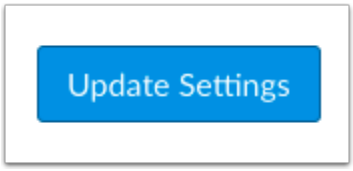
On the account settings page, under the features section, select the **Equella** checkbox.

Enter Equella Settings



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

Update Settings



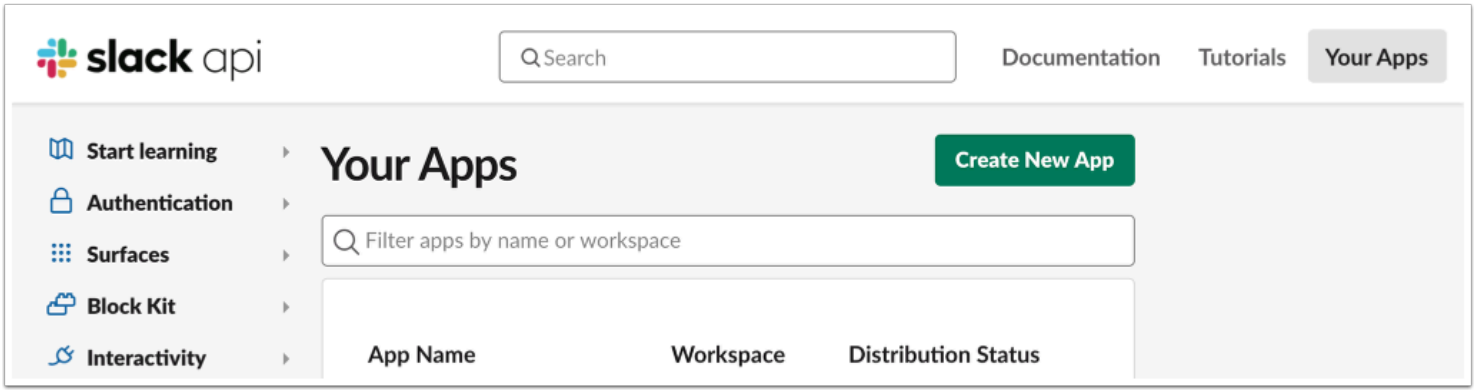
Click the **Update Settings** button.

How do I enable Slack for an account?

To enable Canvas notifications for all users within a Slack workspace, a user with Slack admin rights must create and install the Slack app to create a Bot Access Token. After the bot is created and verified, individual Canvas users can enable Slack as a Canvas contact method to receive notifications.

Note: Child consortium accounts cannot manage Slack settings.

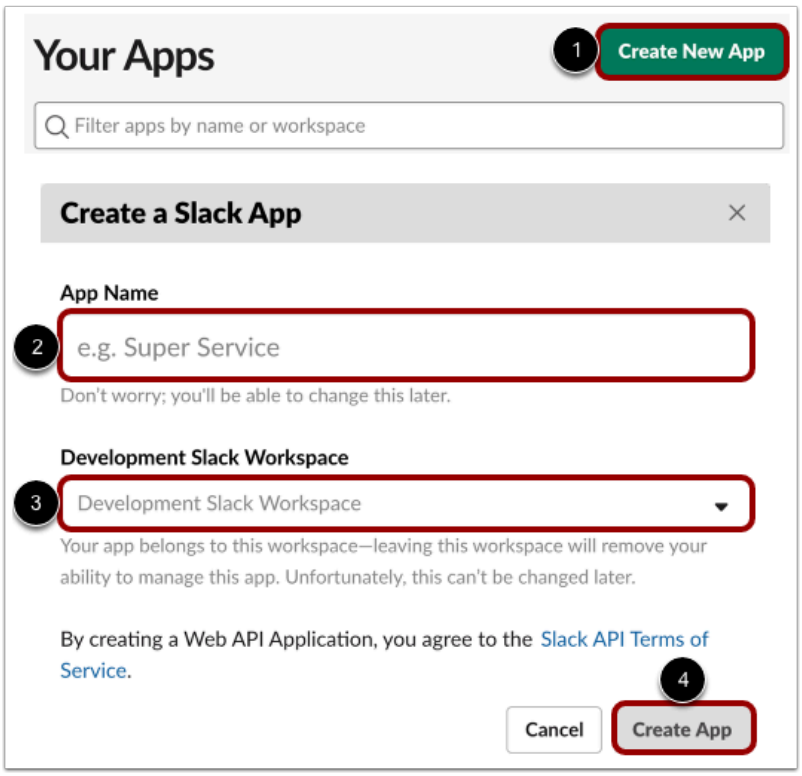
Open Slack Apps



Open api.slack.com/apps in your internet browser.

If necessary, log in to your Slack account.

Create New Slack App



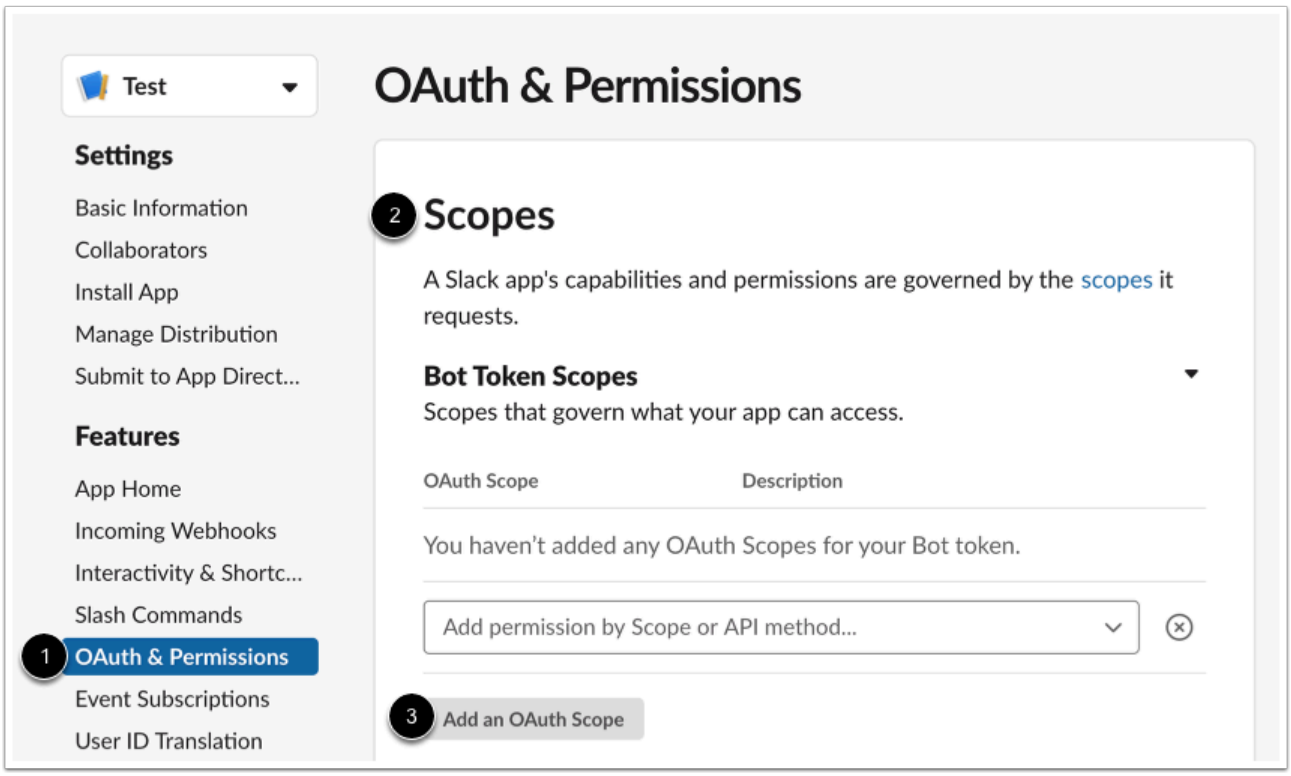
Click the **Create New App** button [1].

Give the app a name in the **App Name** field [2]. The app name will display to users in the Slack workspace.

Select your institution's workspace or the workspace the app should belong to in the **Development Slack Workspace** drop-down [3].

To create the app, click the **Create App** button [4].

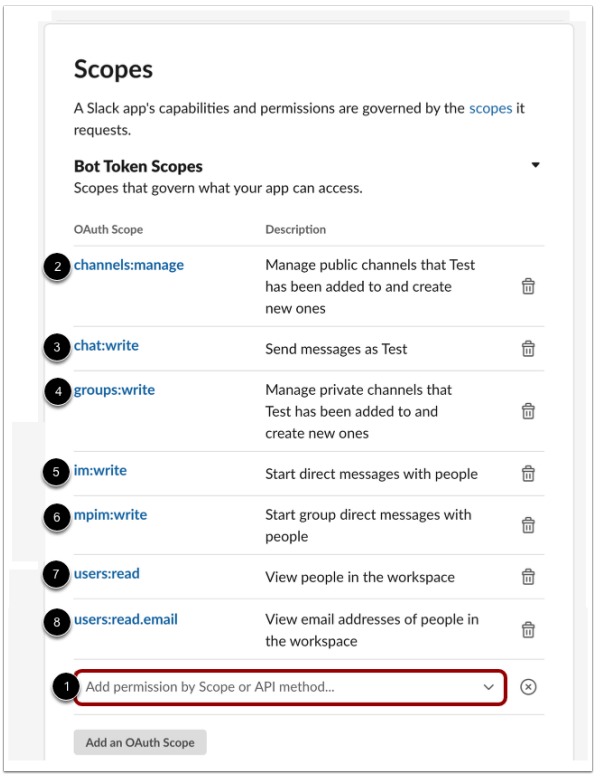
Add OAuth Scope



Open the **OAuth & Permissions** page [1].

In the **Scopes** section [2], click the **Add an OAuth Scope** button [3].

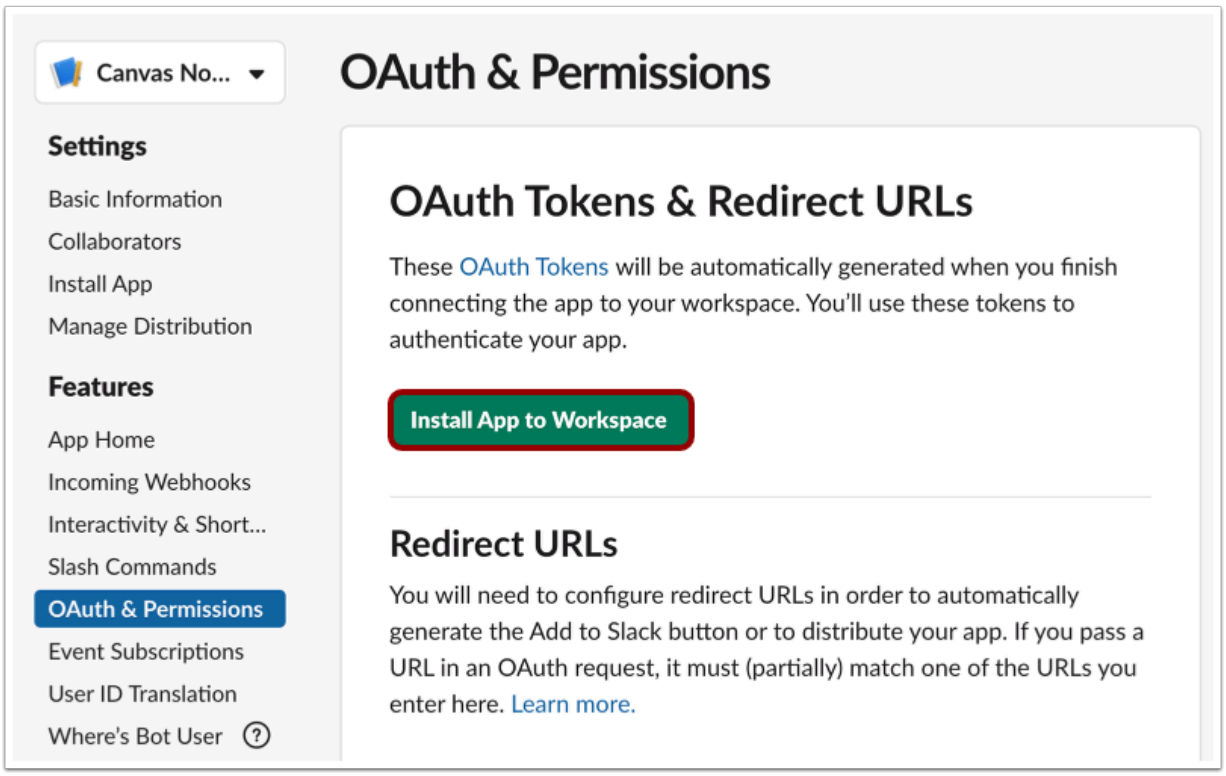
Select Scopes



Click the **Add permission by Scope or API method** drop-down menu [1] and select the following OAuth scope options:

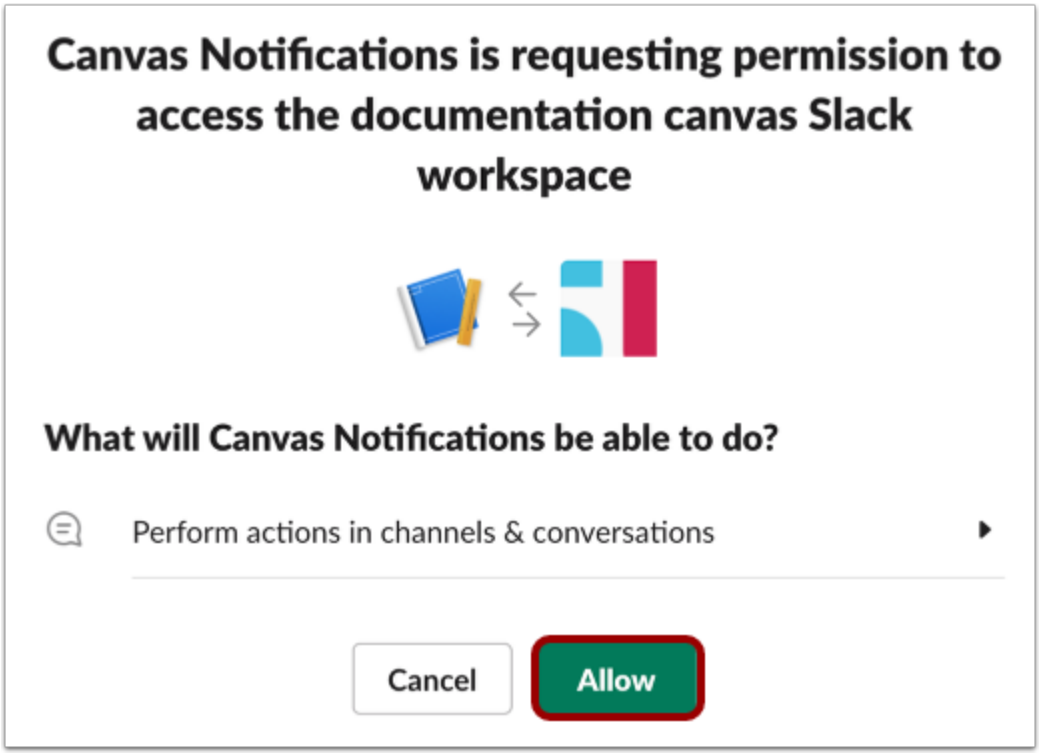
- **channels:manage** [2]: Manage public channels that your Slack app has been added to and create new ones
- **chat:write** [3]: Send messages as your Slack app
- **groups:write** [4]: Manage private channels that your Slack app has been added to and create new ones
- **im:write** [5]: Start direct messages with people
- **mpim:write** [6]: Start group direct messages with people
- **users:read** [7]: View people in the workspace
- **users:read.email** [8]: View email addresses of people in the workspace

Install App



To save and install the app, click the **Install App to Workspace** button.

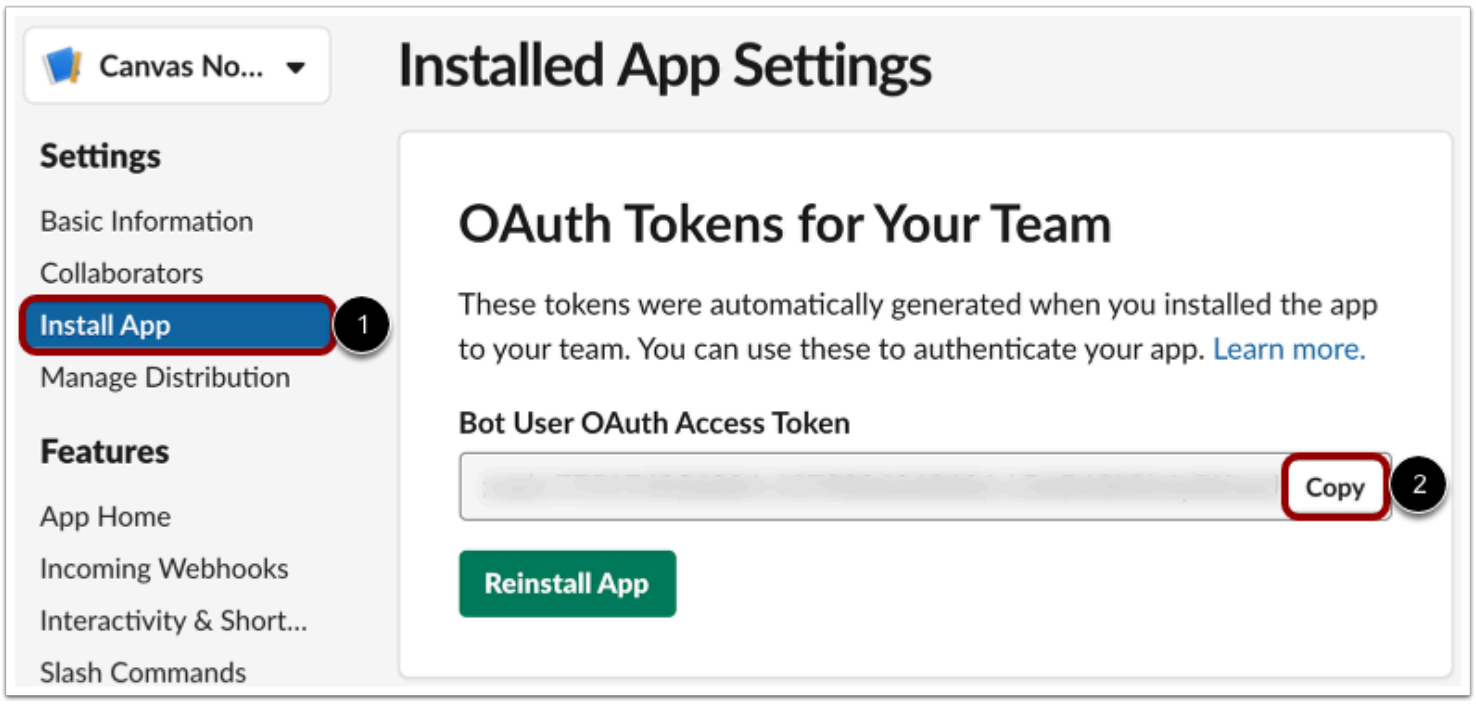
Allow App Workspace Access



A message displays requesting permission for the app to access the Slack workspace.

Click the **Allow** button.

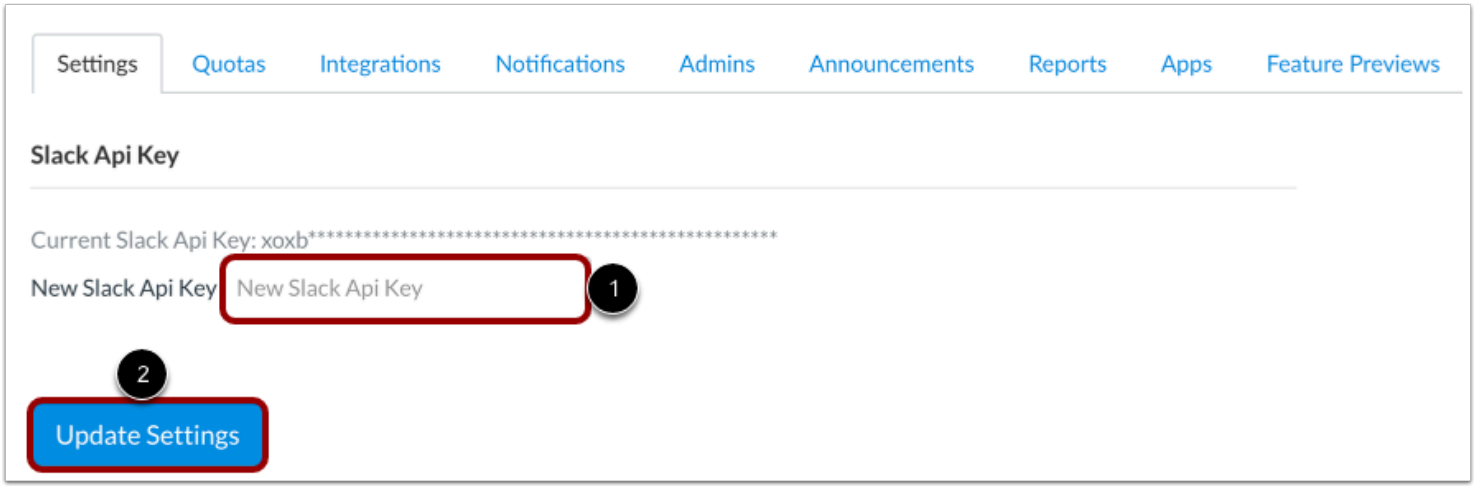
Copy Slack Bot Access Token



Once the app is created in Slack, click the **Install App** link [1].

Locate the Bot User OAuth Access Token and click the **Copy** button [2].

Add Slack API Token

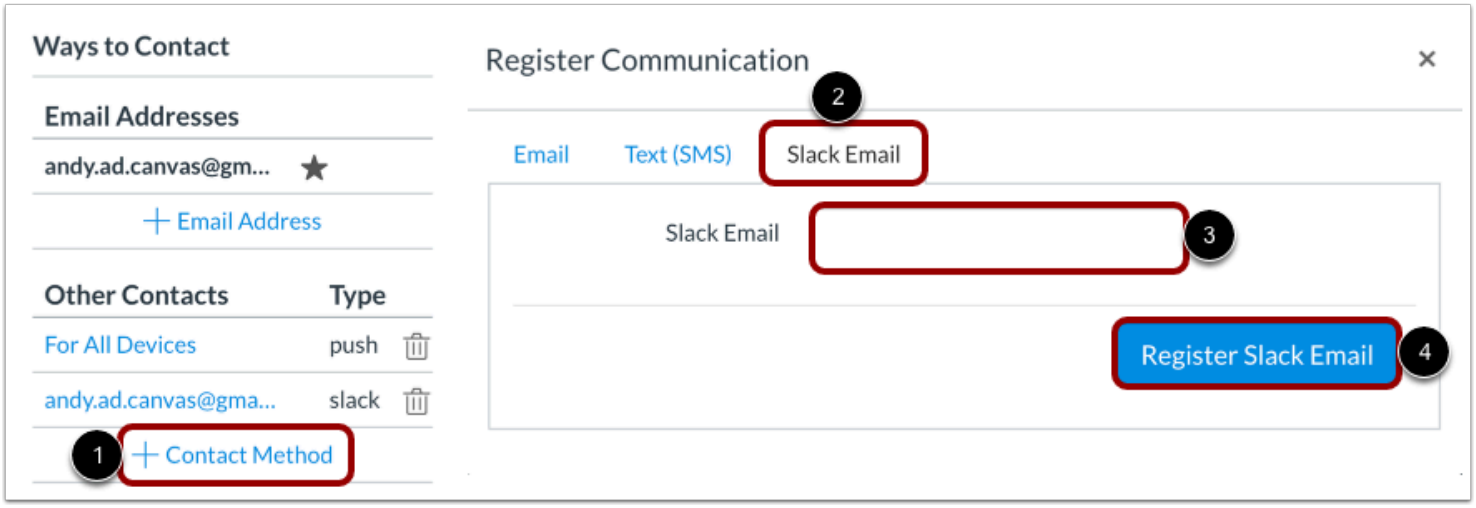


In the Account Settings page in Canvas, locate the Slack API Token section and paste the copied token in the **New Slack API Key** field [1].

To save, click the **Update Settings** button [2].

Note: If the Slack API Key heading does not display, refresh your browser window.

Create Contact Method

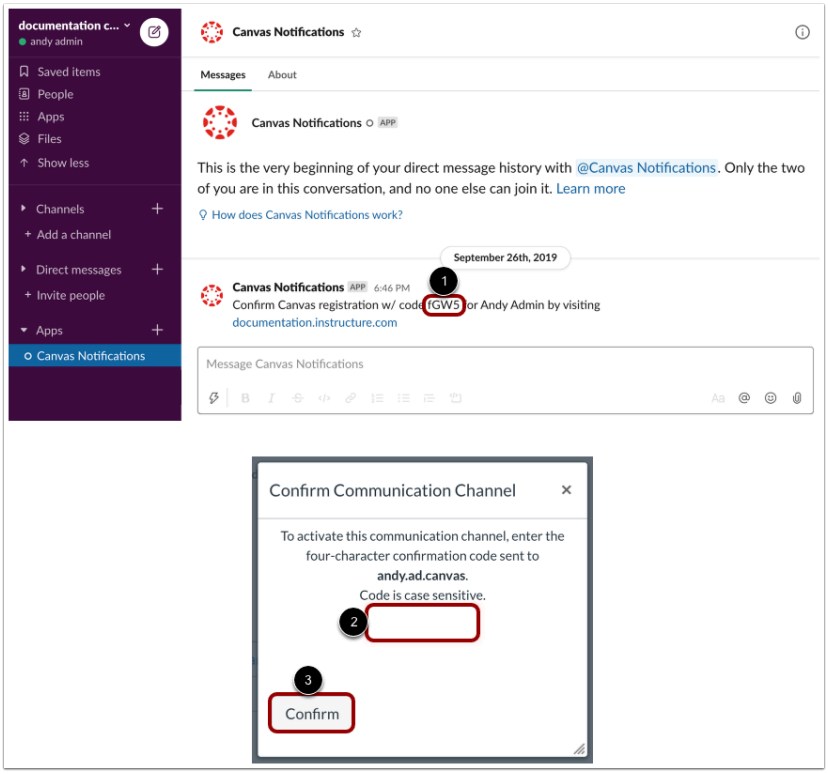


In your user settings page, click the **Add Contact Method** link [1].

Click the **Slack Email** tab [2], and enter the email address of your Slack account in the **Slack Email** field [3].

Then click the **Register Slack Email** button [4].

Confirm Communication Channel



In Slack, look for a notification sent to the newly-created Slack App with a four-digit Canvas registration code [1].

In Canvas, enter the four-digit code in the **Confirm Communication Channel** field [2]. Then click the **Confirm** button [3].

Once confirmed, all users in your Slack account can add the Slack Email contact method and manage their Slack notification settings in the User Settings page.

How do I manage developer keys for an account?

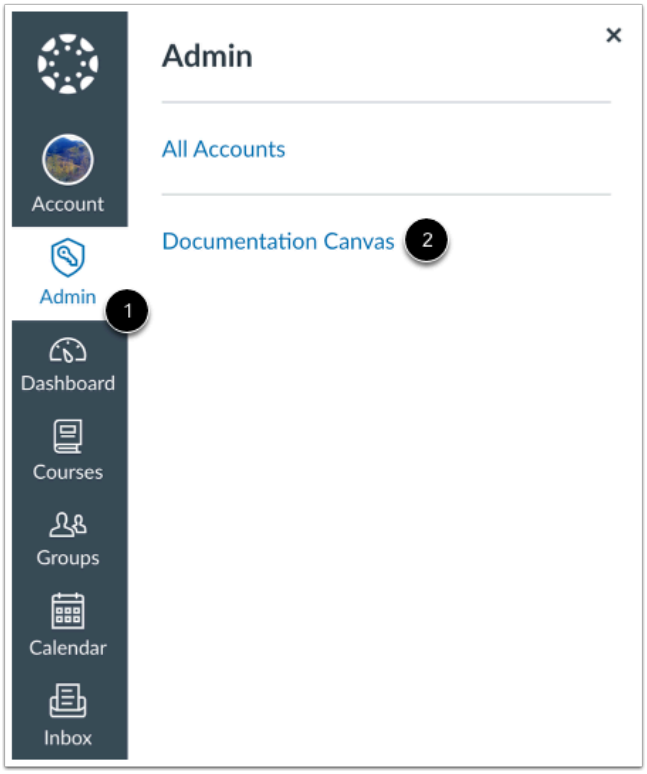
As an admin, you can manage developer keys for root accounts. You can manage the status for individual developer keys and control direct access to specific API endpoints for third-party tools.

Newly-created developer keys default to off in an account.

Notes:

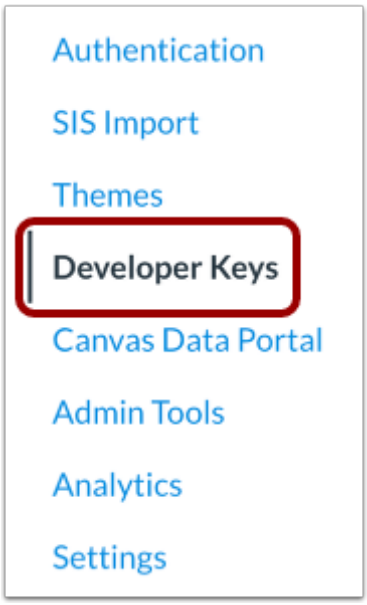
- Developer Keys is an account permission. If you cannot view the Developer Keys link in Account Navigation, this permission has not been enabled for your user account.
- Although new keys are disabled when created, keys created prior to July 14, 2018, have been turned on by default to ensure uninterrupted access.
- If an external tool is inactive, Canvas LMS prioritizes connecting to it using a unique client ID rather than relying on factors like domain structure or ID order.
- Instructure does not review vendors prior to issuance of global developer keys, though specific vendor information is required. You should review your list of inherited keys to ensure that only institution-approved keys are active. To determine which developer keys are being used in your account, run the Developer Keys Report.
- Developer key states and tokens from a consortium parent account are not inherited in subaccounts of a standard consortium child account. Additionally, enabling or disabling developer keys in the parent account of a non-centrally managed consortium does not affect the tool installations in child accounts.
- You can use Canvas Apps to manage LTI apps. For more information, refer to our Canvas Apps guides.

Open Account



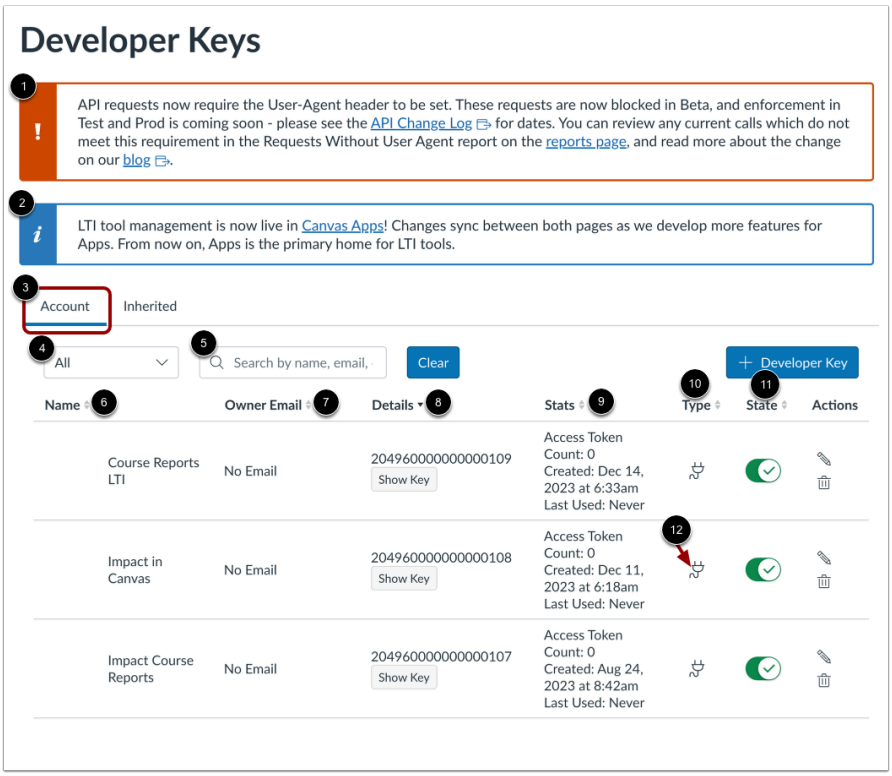
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Developer Keys



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

View Developer Keys



A banner displays helpful resources informing admins of upcoming enforcement of user-agent headers [1].

A message displays to notify users that LTI tool management is now live in Canvas Apps, including a link to the page [2].

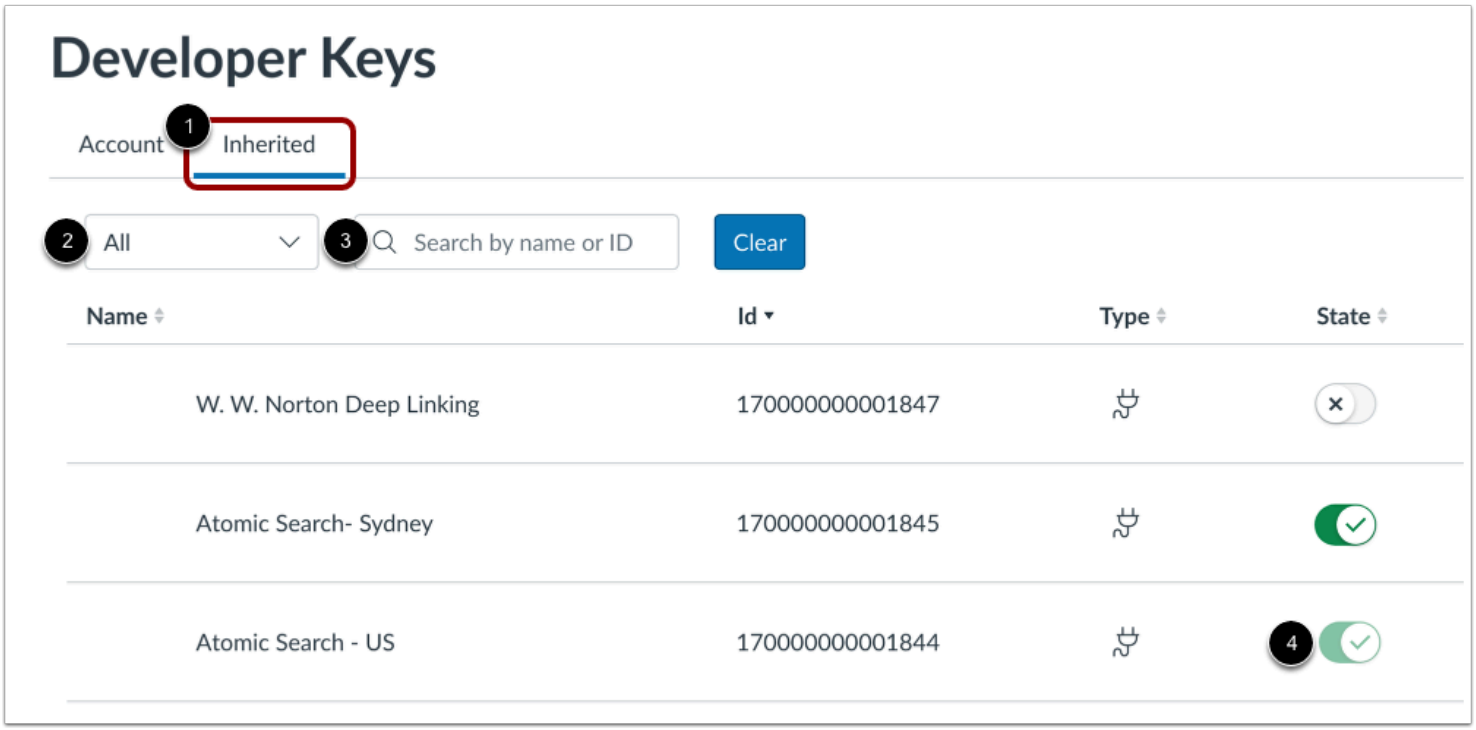
The Developer Keys page defaults to the Account tab [3], where you can view the developer keys for your account. The account page displays the All filter [4], which displays all account developer keys. You can also select between viewing All, LTI keys, and API keys.

To search for an account key, enter a name, email, or ID in the **Search by name, email, or ID** field [5].

Each key shows the **Name** [6], **Owner Email** [7], **Details** [8], **Stats** [9], **Type** [10], and **State** [11].

If a key has been configured as an LTI key, the Type column will display the **External Tool** icon [12].

View Inherited Keys



To view inherited keys associated with your account, click the **Inherited** tab [1].

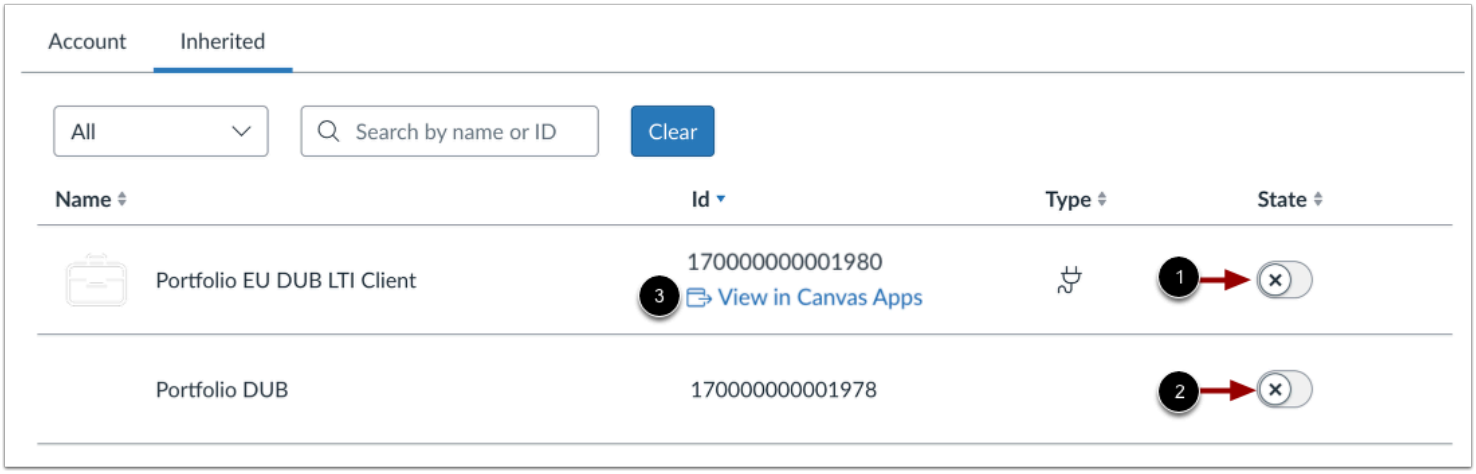
By default, the inherited page displays the **All** filter [2], which displays all inherited developer keys. You can also select between viewing All, LTI keys, and API keys.

To search for an inherited key, enter name or ID in the **Search by name or ID** field [3].

Inherited keys are keys created and managed at a global level by Canvas. You can manage the state of inherited keys for your account. However, if a key is grayed out [4], it has been enabled globally and cannot be modified on a specific account level.

Note: For search results to display, you must enter at least three characters in the search field.

Portfolio Inherited Developer Keys

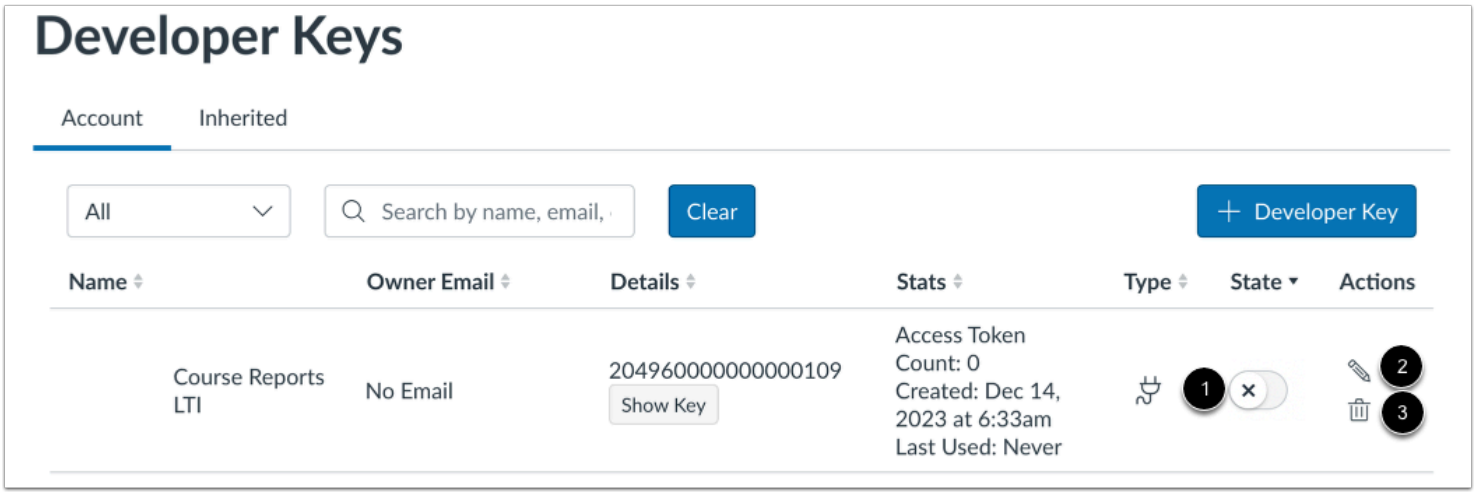


Canvas Portfolio is enabled by default in the User Navigation. In Developer Keys, you can disable the LTI Client [1] and API key [2] for the institutions region. To change the placement, click the **View in Canvas Apps** link [3].

Notes:

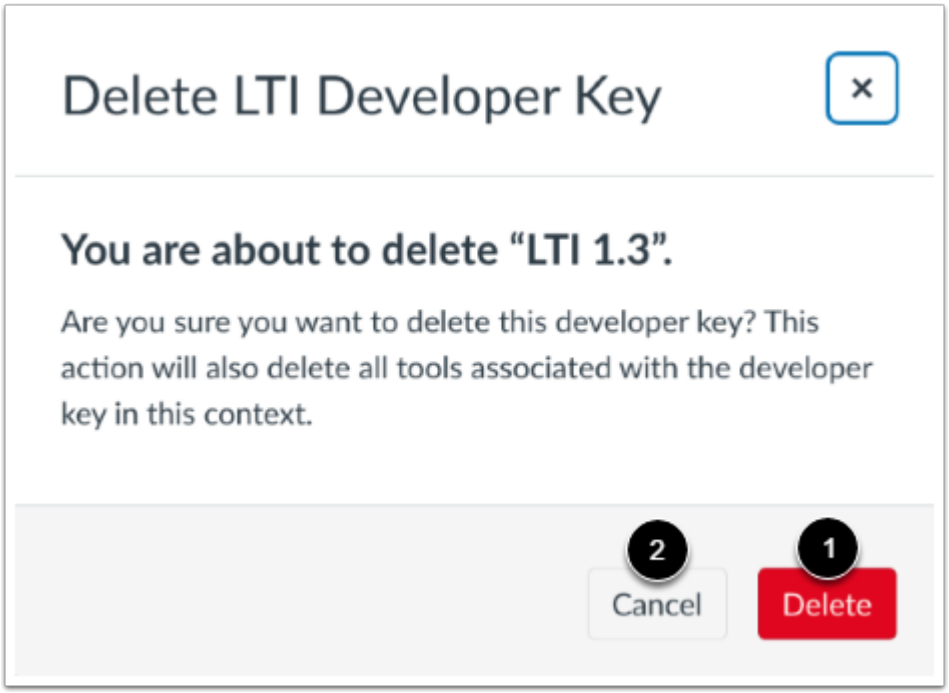
- Canvas Portfolio offers a more intuitive design and flexible tools. Instructors can assign structured, competency-based portfolios, while learners can showcase academic and co-curricular work with reflections, tagging, and shareable links supporting meaningful assessment and real-world readiness.
- Canvas Portfolio also includes app placement features.

Manage Developer Keys



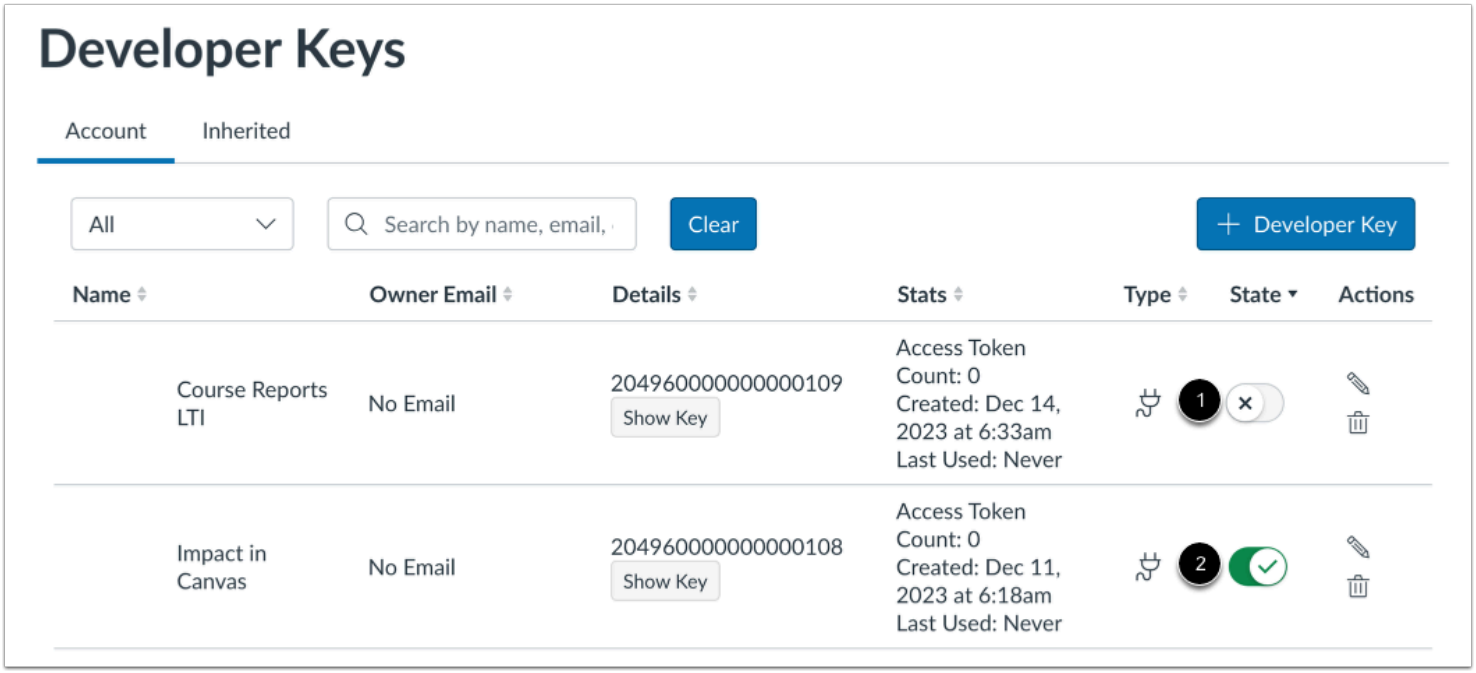
To deactivate a key, click the **State** toggle off [1]. To edit a key, click the **Edit** icon [2]. To delete the key, click the **Delete** icon [3].

View Confirmation Message



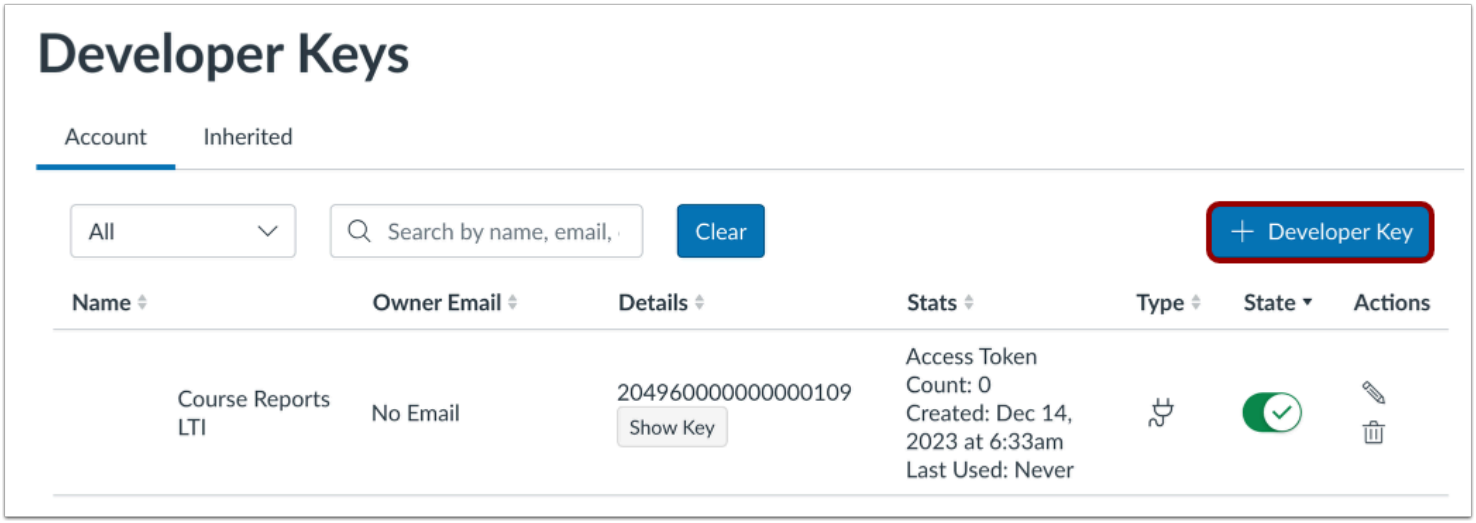
When changes are made to a developer key, a confirmation message displays. To confirm the changes, click the **Delete** button [1]. To cancel the changes, click the **Cancel** button [2].

View Deactivated Keys



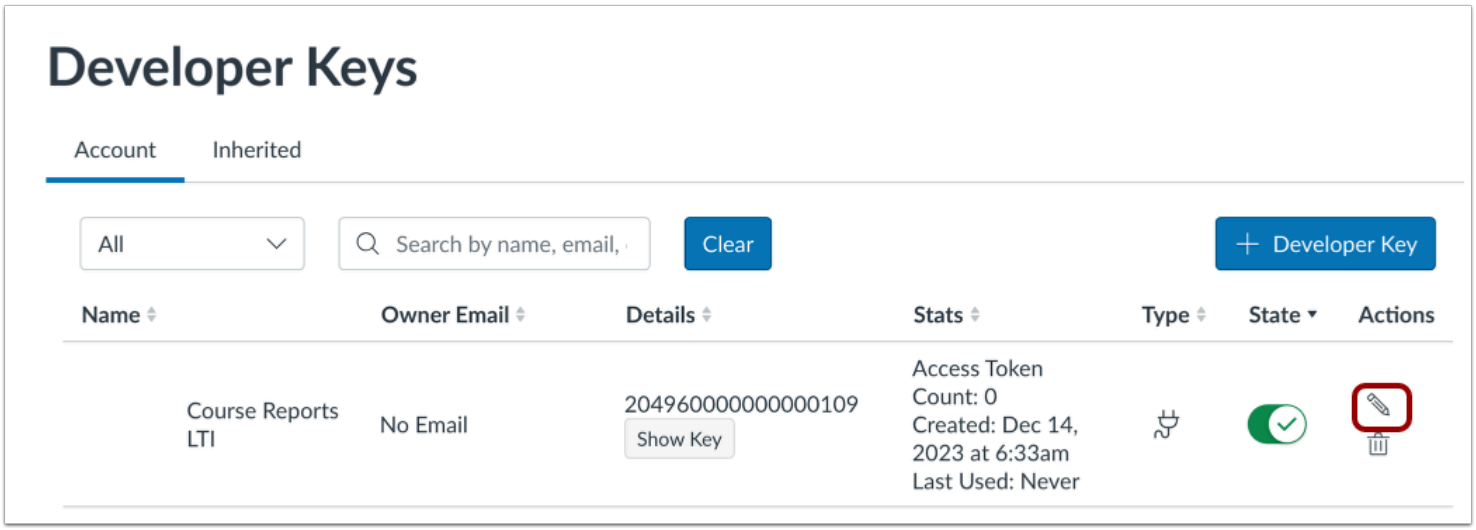
When a key is deactivated, the key is inactive. Deactivated keys are indicated by the off toggle in the State column [1]. To reactivate an inactive key, click the **State** toggle on [2].

Add Developer Key



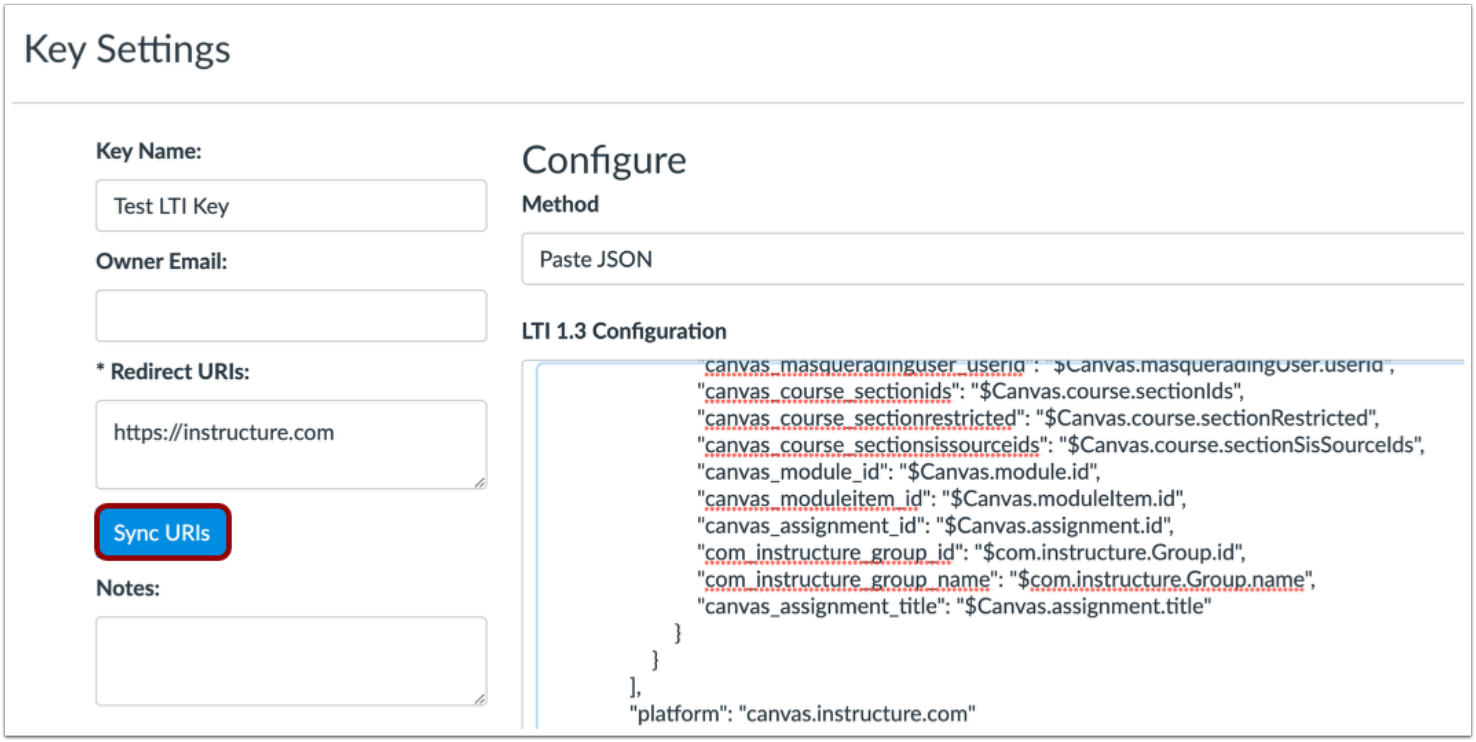
To add a developer key, click the **Add Developer Key** button.

Edit Developer Key



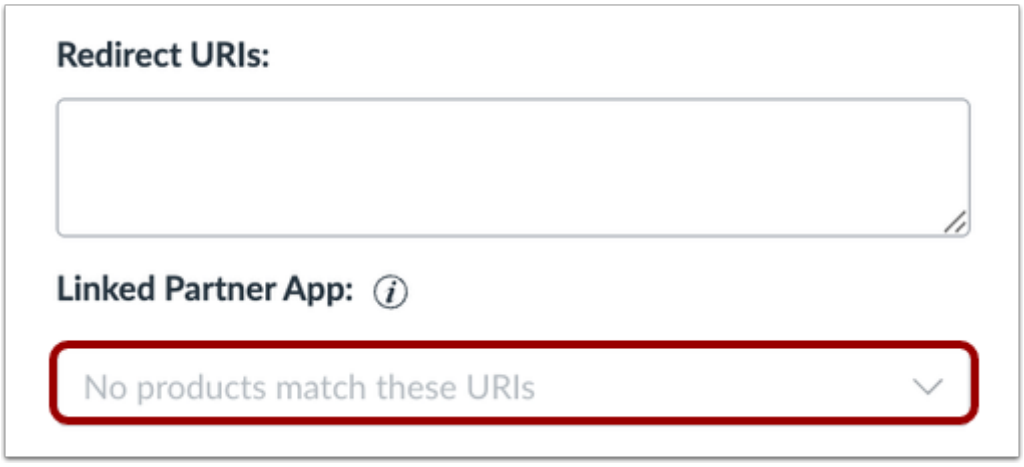
To edit a developer key, click the **Edit** icon.

Update Redirect URI for LTI Key



To update the **Redirect URIs** field after changing the JSON for an LTI key, click the **Sync URIs** button. If the **Redirect URIs** field is empty, it auto-populates from the pasted JSON.

Update Linked Partner App for API Key



When you add or update a redirect URI for an API key, Canvas checks for matching partner apps.

If no matches are found, the UTID field stays blank. If one match is found, the UTID is automatically filled in. If multiple matches are found, you can choose the correct partner app from the dropdown; nothing is selected automatically.

How do I add a developer API key for an account?

As an admin, you can create developer API keys for root accounts. A developer API key is a code given to a third-party application developer that allows access to certain information and permissions within Canvas. Developer API keys can be used to create custom integrations with Canvas and allow third-party apps to use Canvas authentication. The developer API key uses OAuth2 to enable the application to use Canvas for authentication. For more information about OAuth2, see the Instructure API OAuth documentation.

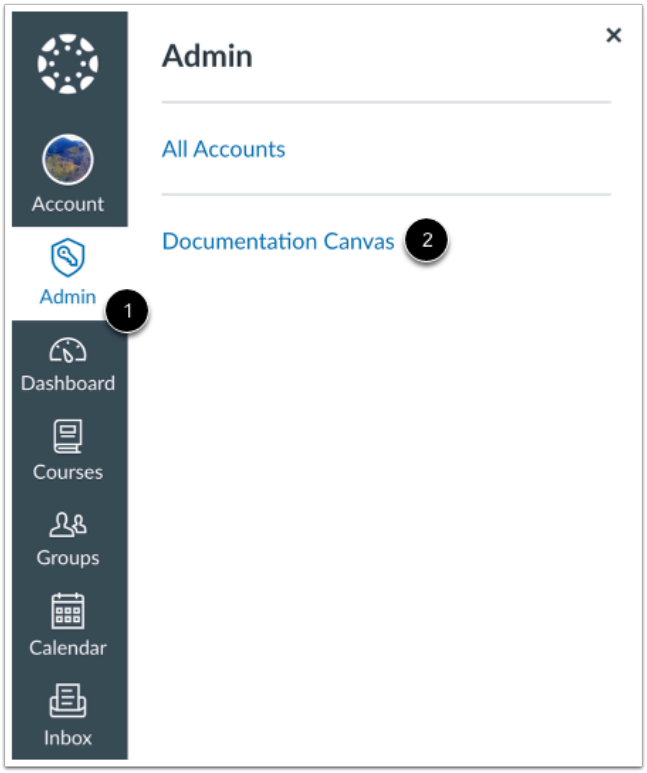
The developer API key is sent from the application to Canvas when a user requests access. The application asks the user for permission to programmatically create an API access token. When the user authorizes the application, the third-party application will have the same access to information and account permissions as the user who granted access. For more information about developer documentation, see the Instructure Github page.

Key Scoping

Developer API Keys include functionality for key scoping as part of adding a developer API key. Key scoping allows you to control direct access to specific API endpoints for third-party tools.

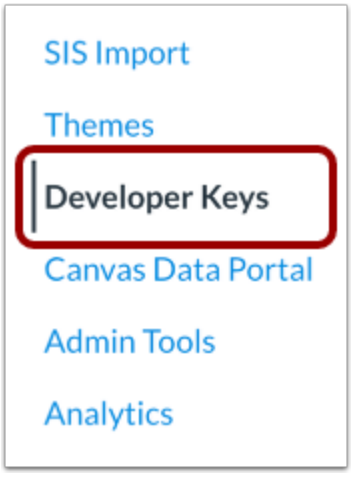
Note: Developer Keys is an account permission. If you cannot view the Developer Keys link in Account Navigation, this permission has not been enabled for your user account.

Open Account



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

Open Developer Keys



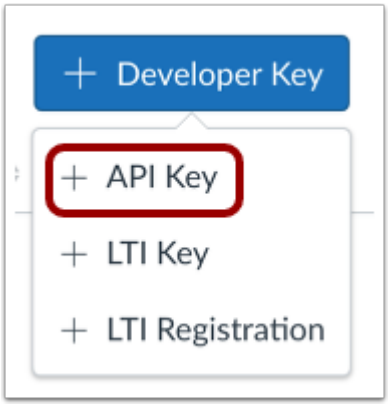
In Account Navigation, click the **Developer Keys** link.

Add Developer Key



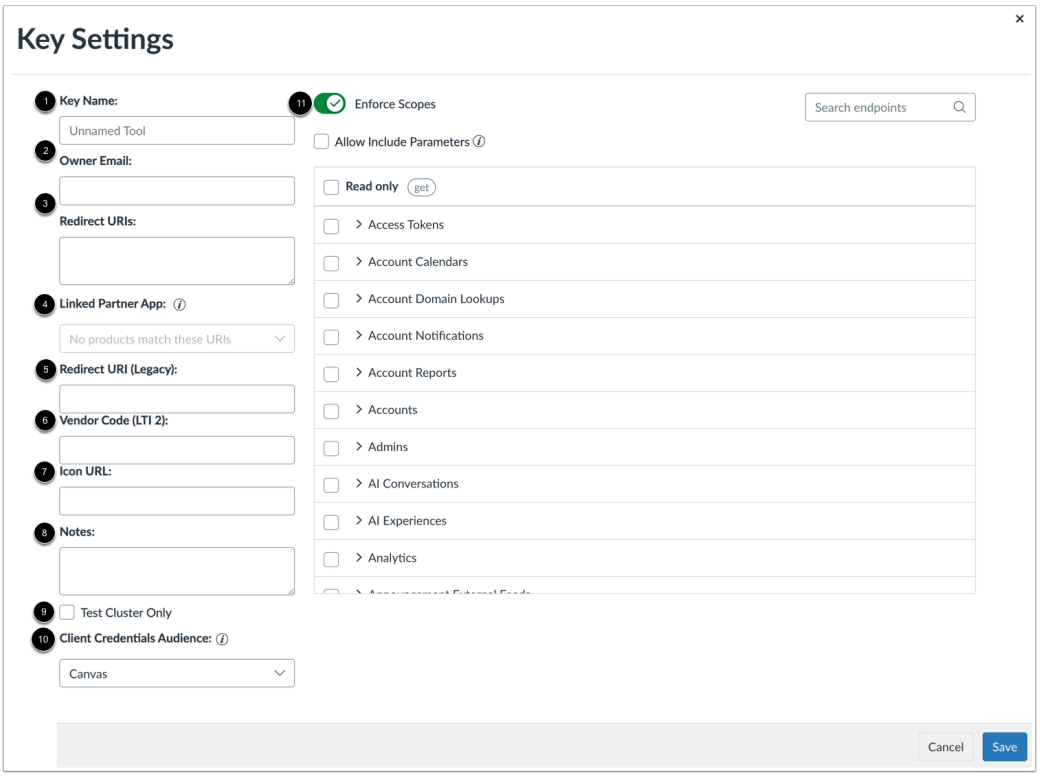
Click the **Add Developer Key** button.

Add API Key



Click the **Add API Key** option.

Enter Key Settings

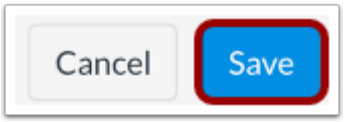


Enter the settings for the developer API key:

- **Key Name** [1]: Usually your app or company name. This field will be shown when users are asked to approve access to their Canvas account on your behalf.
- **Owner Email** [2]: The email of the person who owns the developer tool.
- **Redirect URIs** [3]: The domains where tokens are requested. These URIs are not your Canvas URL. To avoid mixed content browser concerns, use https.
- **Linked Partner App** [4]: When you add a redirect URI, Canvas checks for matching partner apps.
  - If no matches are found, the UTID field stays blank.
  - If one match is found, the UTID is automatically filled in.
  - If multiple matches are found, you can choose the correct partner app from the dropdown; nothing is selected automatically.
- **Redirect URI (Legacy)** [5]: The URI for the key redirect. This field allows you to set the previous URI for a tool. Eventually this field will be removed.
- **Vendor Code (LTI 2)** [6]: A unique registered code which identifies the vendor or developer of the third-party tool. This is specifically for LTI 2 tools and apps.

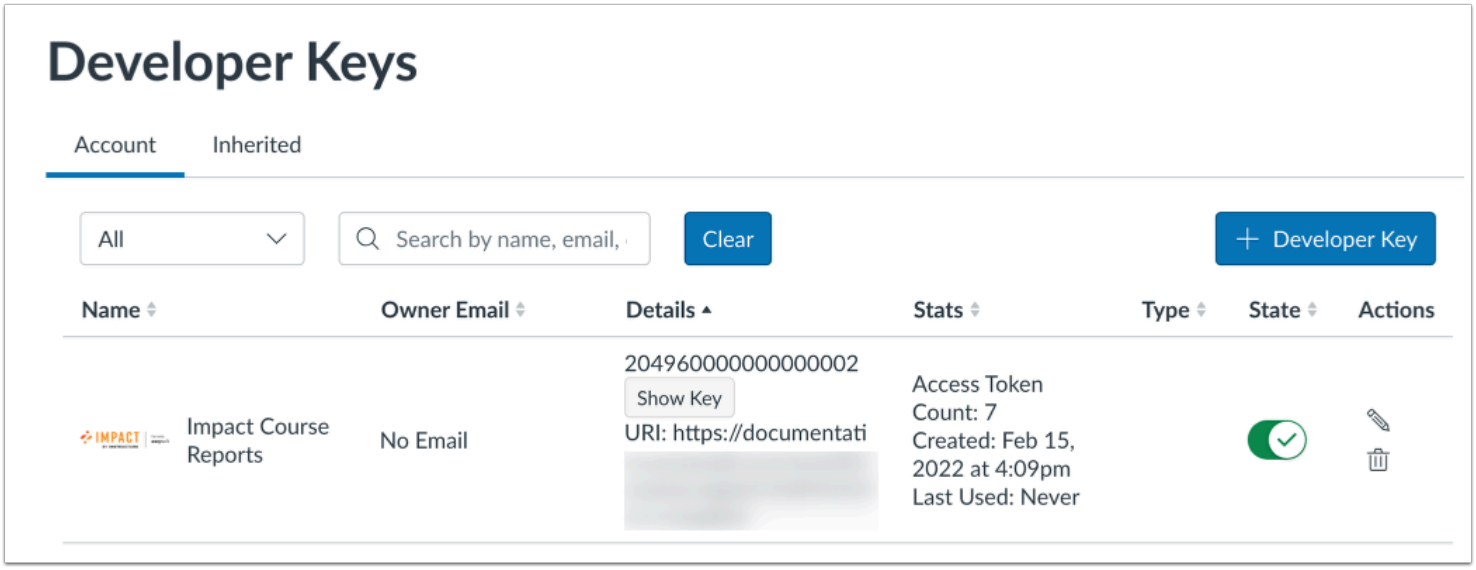
- **Icon URL** [7]: The URL of the icon for your developer tool. This URL is presented to the user to approve authorization for your tool. To avoid mixed content browser concerns, use https.
- **Notes** [8]: Any notes about the developer key, such as the reason it was created.
- **Test Cluster Only** [9]: Creates a developer key that can only be used in the Canvas test environment.
- **Client Credentials Audience** [10]: Choose whether the credentials issued by the key will be presented to Canvas or to a peer service.
- **Enforce Scopes** [11]: Allows you to customize access for the key. Otherwise, the key will have access to all endpoints available to the authorizing user.

Save Key



Click the **Save** button.

View Key



View the Developer Key for your account. You can also manage existing developer keys.

How do I enable scoping for a developer API key in an account?

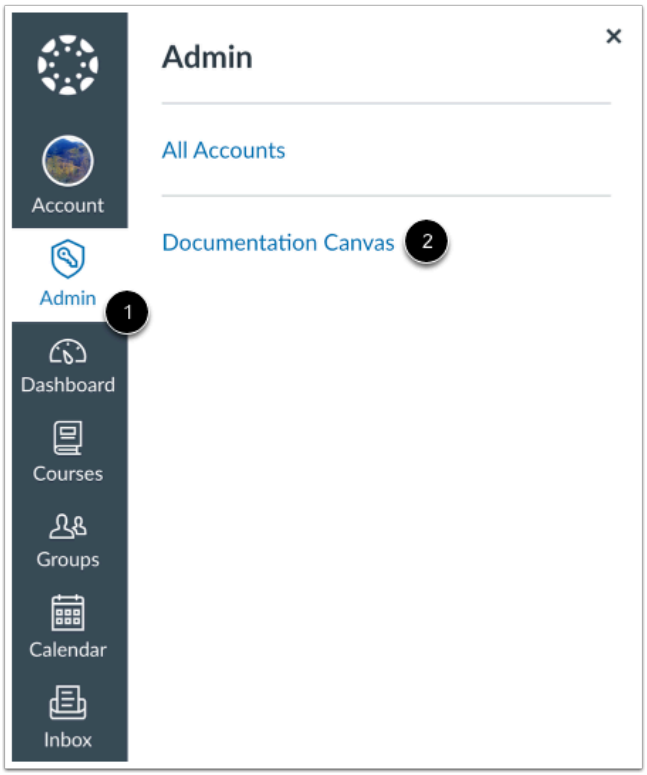
As part of creating new developer API keys or editing existing developer API keys in your account, you can customize the access the API key receives. Enforcing scopes allows you to control direct access and specific API endpoints for third-party tools associated with your institution.

By default, scope enforcement is enabled when creating a new developer API key. If it is disabled, tokens have access to all endpoints available to the authorizing user.

Notes:

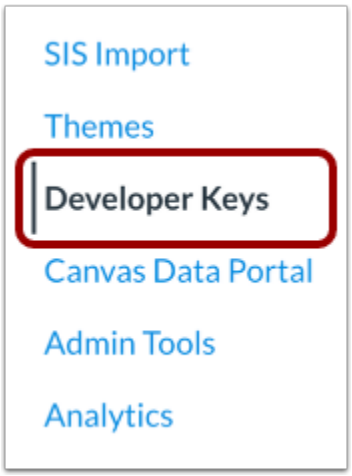
- Managing Developer Keys is an account permission. If you cannot manage developer keys, this permission has not been enabled for your user role.
- Developer Keys are not available in subaccounts.

Open Account



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

Open Developer Keys



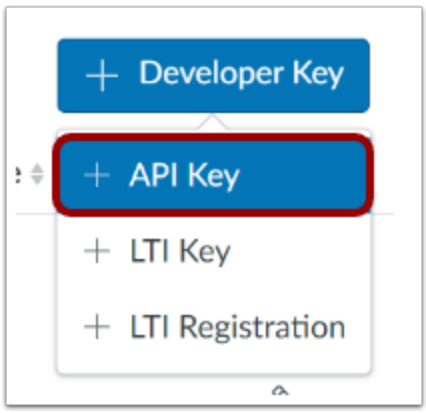
In Account Navigation, click the **Developer Keys** link.

Add Developer Key



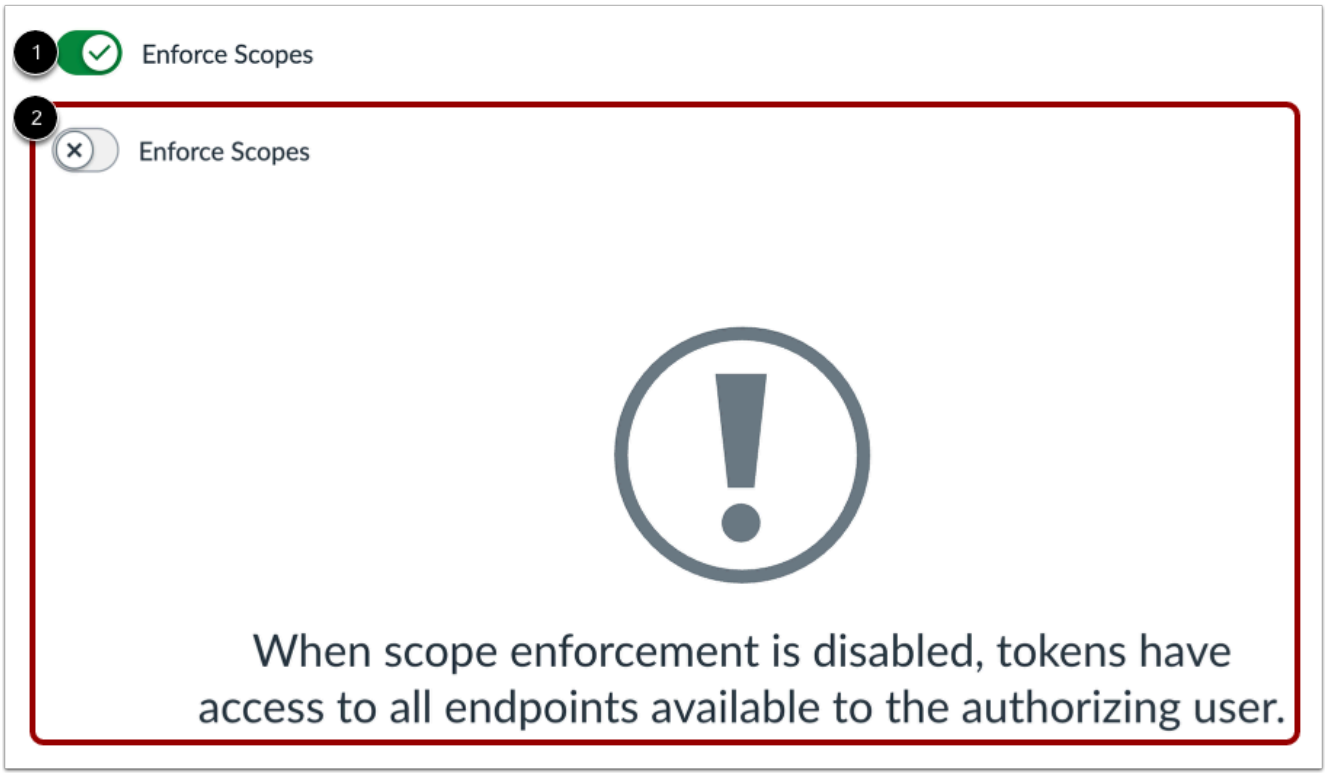
Click the **Add Developer Key** button.

Add API Key



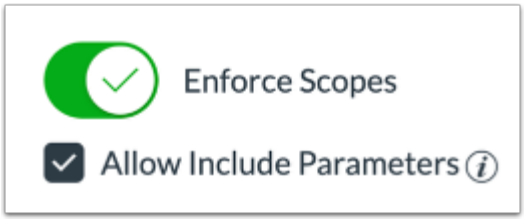
Click the **Add API Key** option.

Enforce Scopes



By default, the Enforce Scopes toggle is turned on [1]. If it is disabled, a warning message appears [2].

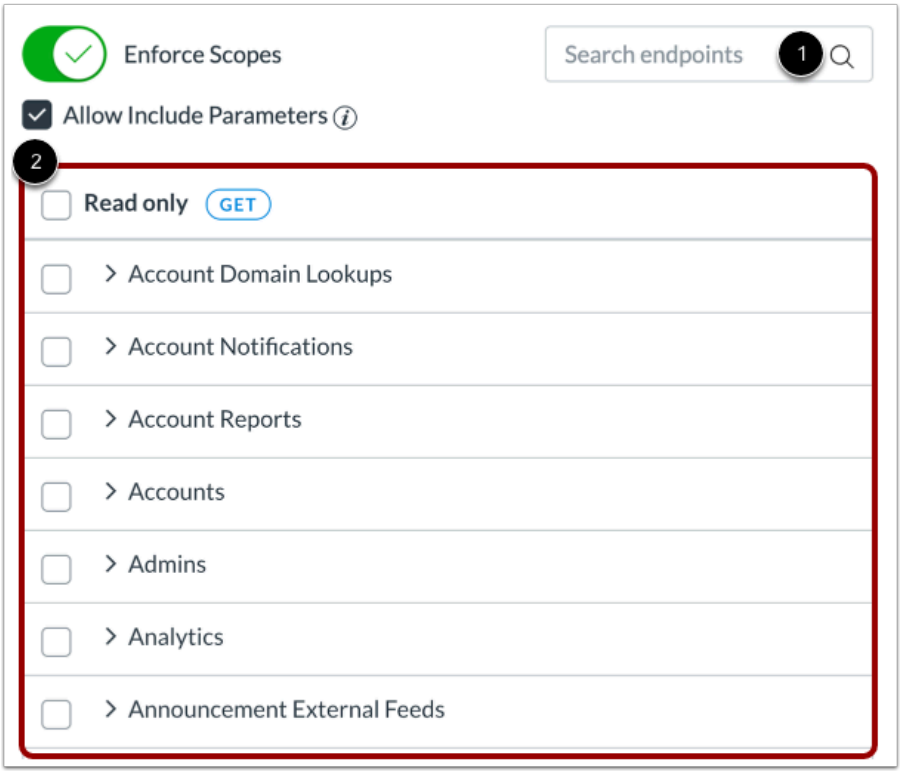
Allow Include Parameters



To permit usage of all *includes* parameters for this key, click the **Allow Include Parameters** checkbox.

Includes parameters may grant access to additional data that is not included in the Endpoints table.

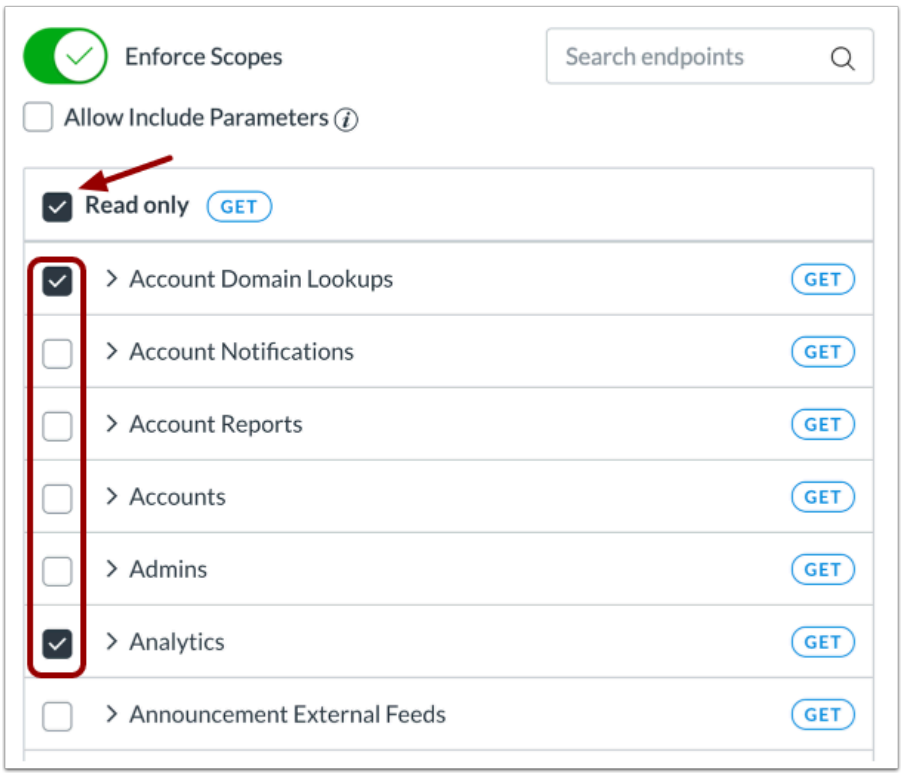
Search Endpoints



To search for a specific endpoint or section header, type the name of the endpoint in the **Search Endpoints** field [1].

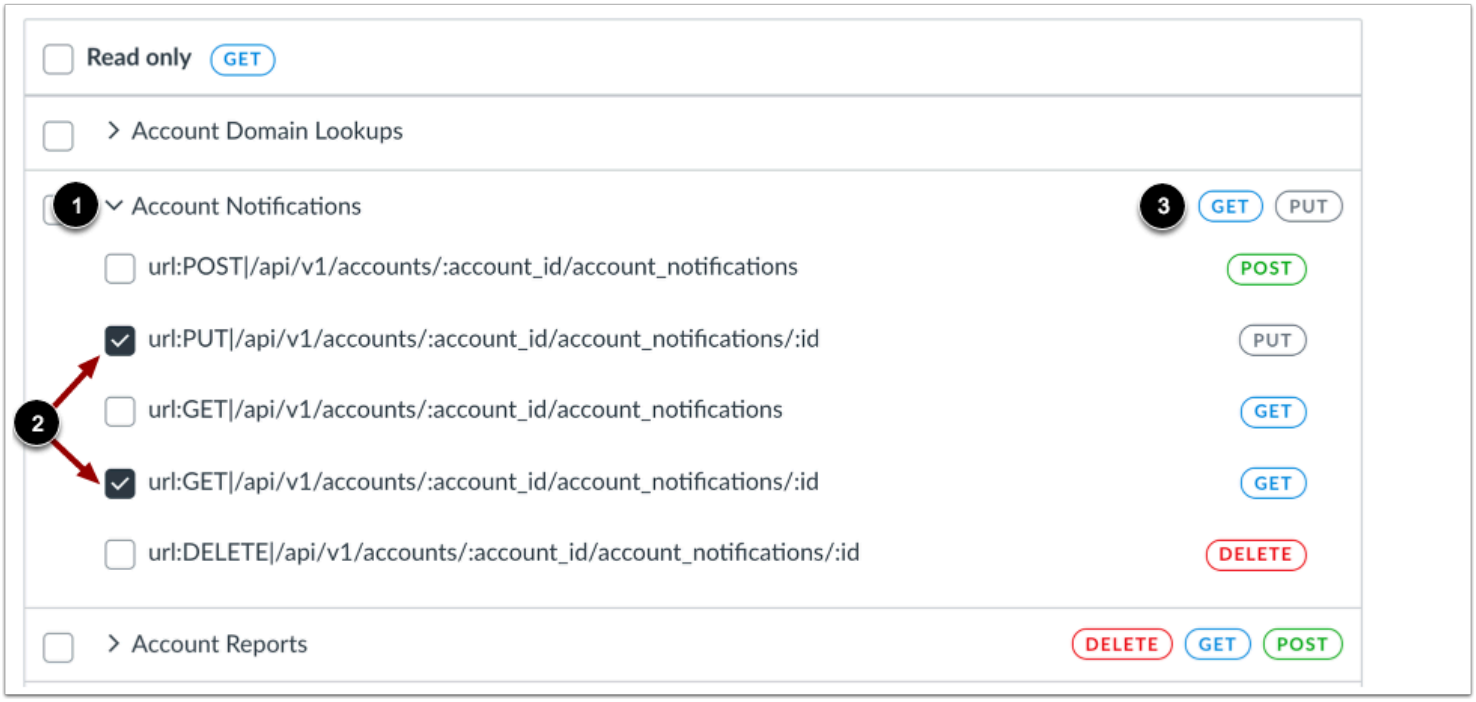
To see all available endpoints, scroll through the Endpoints table [2].

Select Read Only Endpoints



To grant read-only (GET) access to the developer key, click the **Read only** checkbox. The table will automatically update and select all scopes that contain read-only endpoints.

Select Individual Endpoints



You can grant customized access to the developer API key. Click any scope name to view available endpoints [1]. Select the desired endpoints by clicking the checkbox next to the endpoint name [2]. The scope name line will update to show the summary of the collective selected endpoint access [3].

Save Key



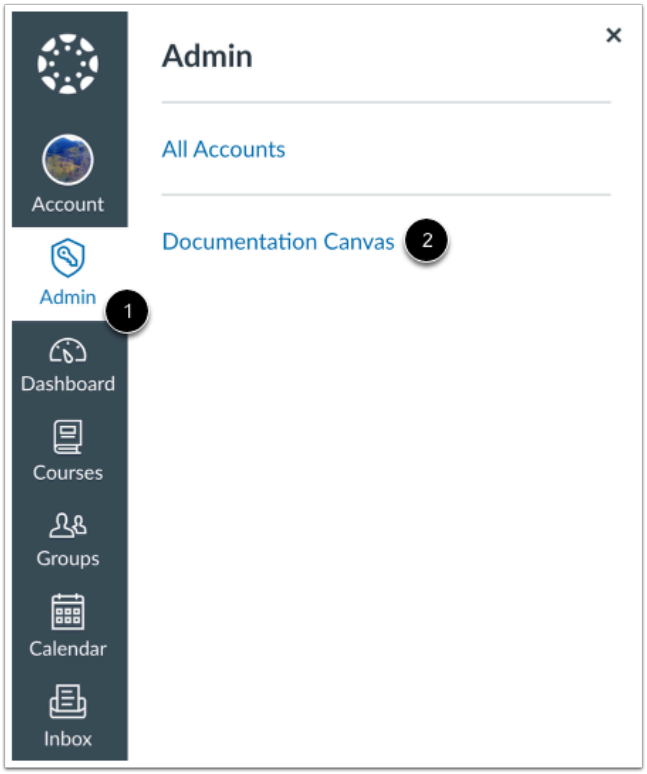
Click the **Save** button.

How do I add a developer LTI Registration key for an account?

As an admin, you can create developer LTI Registration keys for an account.

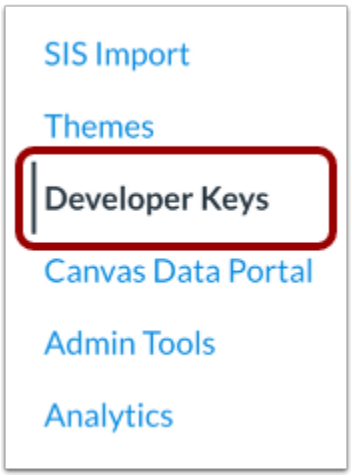
Note: Developer Keys is an account permission. If you cannot view the Developer Keys link in Account Navigation, this permission has not been enabled for your user account.

Open Account



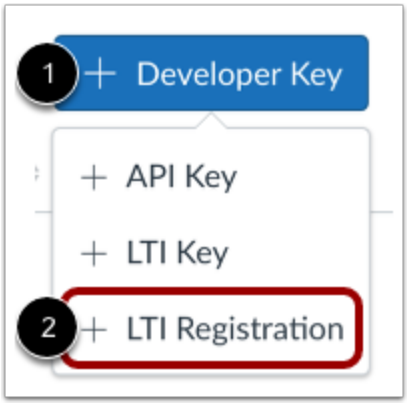
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Developer Keys



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

Add Registration Key



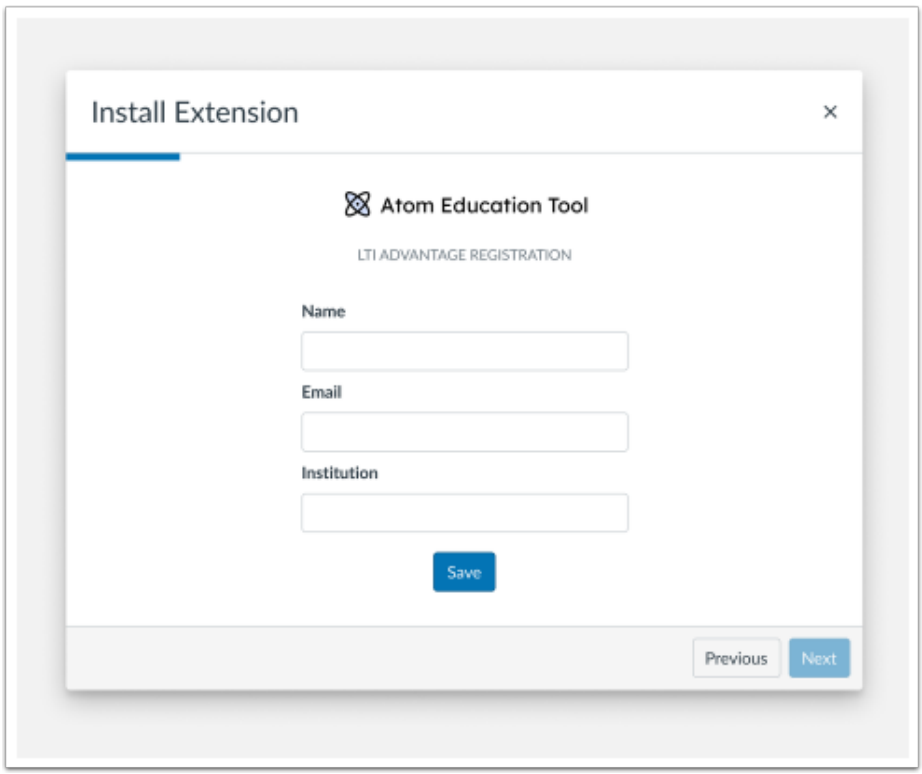
Click the **Add Developer Key** button [1]. Then click the **LTI Registration** option [2].

Enter Registration URL



Enter the URL in the **Dynamic Registration URL** field [1], and then click the **Continue** button [2].

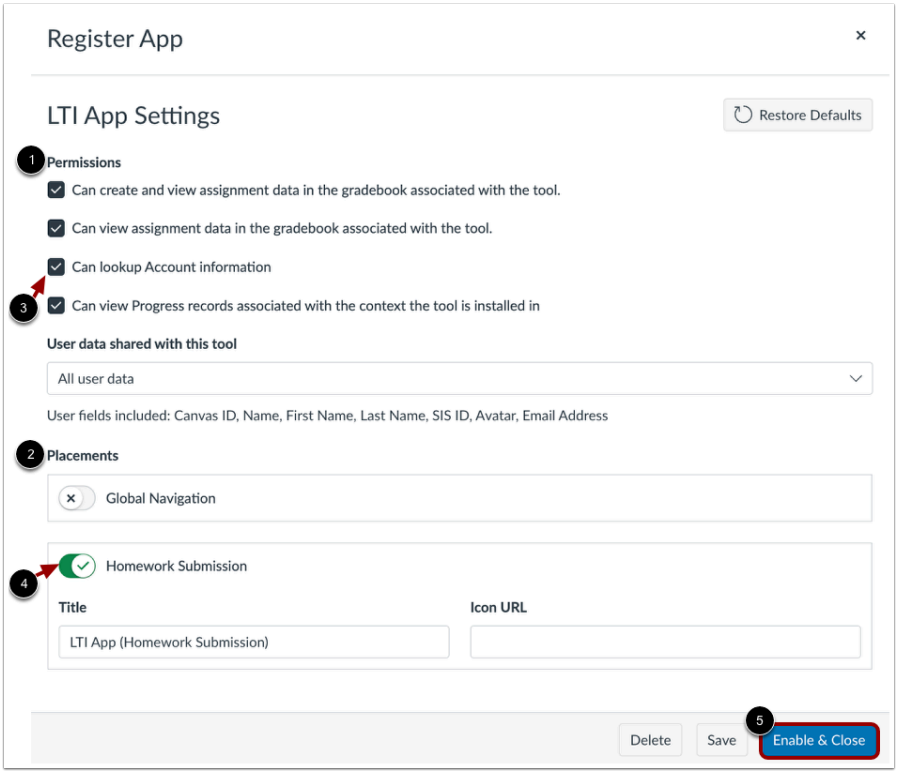
Sign in to Registration URL



Sign into the tool and install the external tool.

Note: This page may differ depending on the external tool being used.

Register App



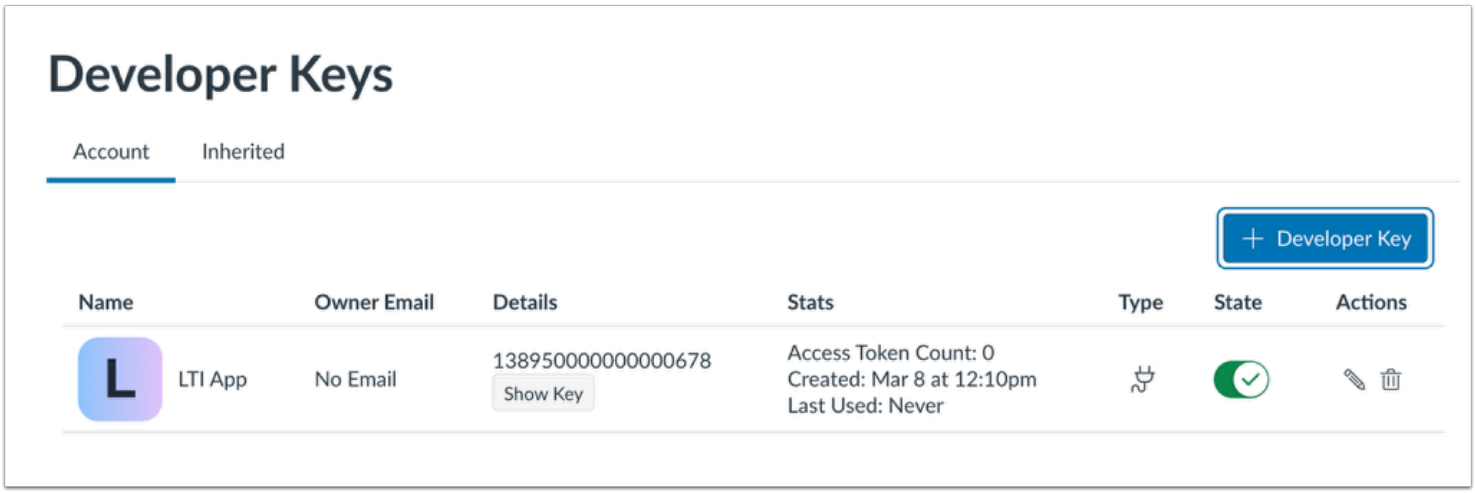
In the LTI App Settings, admins have the ability to manage the external tool's permissions [1] and placements [2]. By default, all permissions and placements are activated.

To change permissions, click the checkbox next to the permission [3].

To hide a placement, click the toggle off [4].

To add your account, click the **Enable & Close** button [5].

View App



View the LTI Registration key for your account.

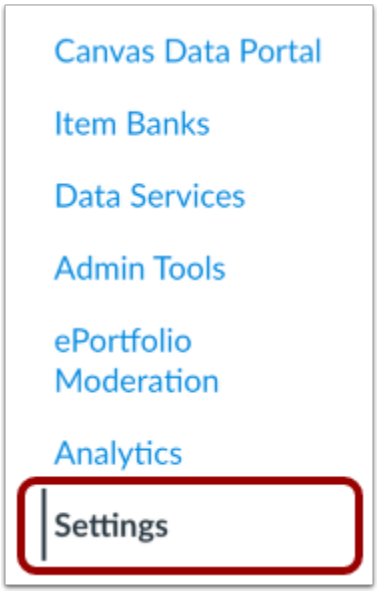
How do I use Microsoft Teams course sync in an account?

As an admin, you can allow instructors to sync data from the People page in a Canvas course to Microsoft Teams. Once course sync has been enabled at the account level, instructors can enable automatic sync and complete a manual sync from their Course Settings page.

Notes:

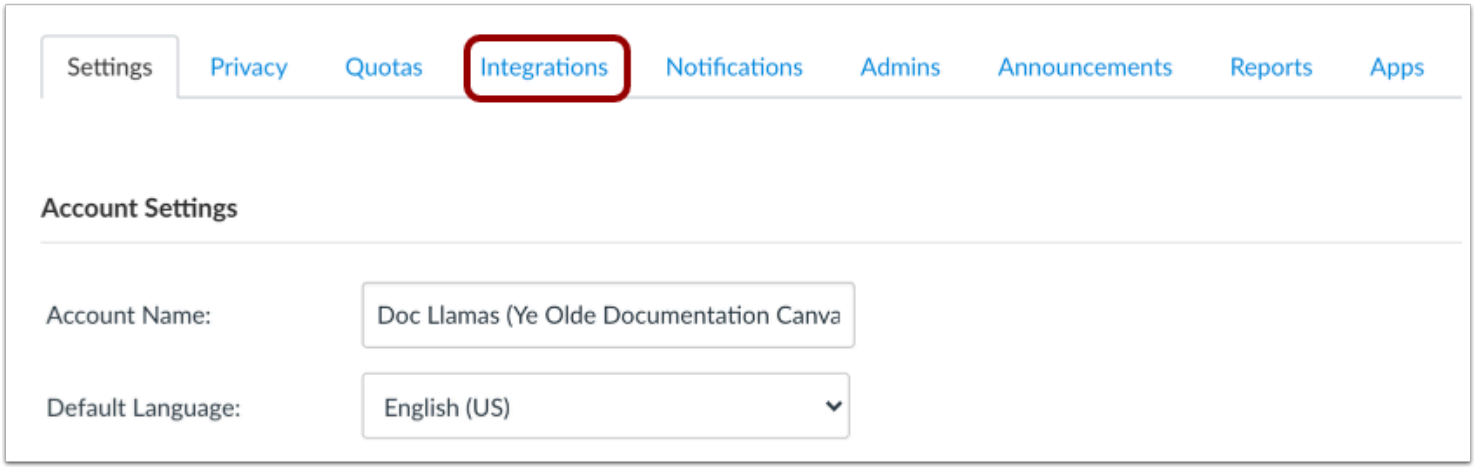
- Granting access to your Microsoft tenant should be completed by the Microsoft 365 admin at your institution.
- Microsoft Teams course sync only supports one Microsoft tenant per Canvas account. Multi-tenant sync is not supported.
- Microsoft Teams course sync does not support syncing course sections and groups.
- Microsoft Teams course sync does not support syncing for courses that have more than 20,000 enrollments or more than 100 users with any role in Canvas other than student.
- Child consortium accounts cannot access the Course Settings Notifications tab.
- For the Microsoft Teams sync to work properly, there must be a user with the Teacher, TA, and/or Designer role in Canvas matching an Owner in Teams.
- Microsoft Teams course sync is currently a defaulted on feature. To manage this feature, learn how to manage feature options in the account features lesson.

Open Settings



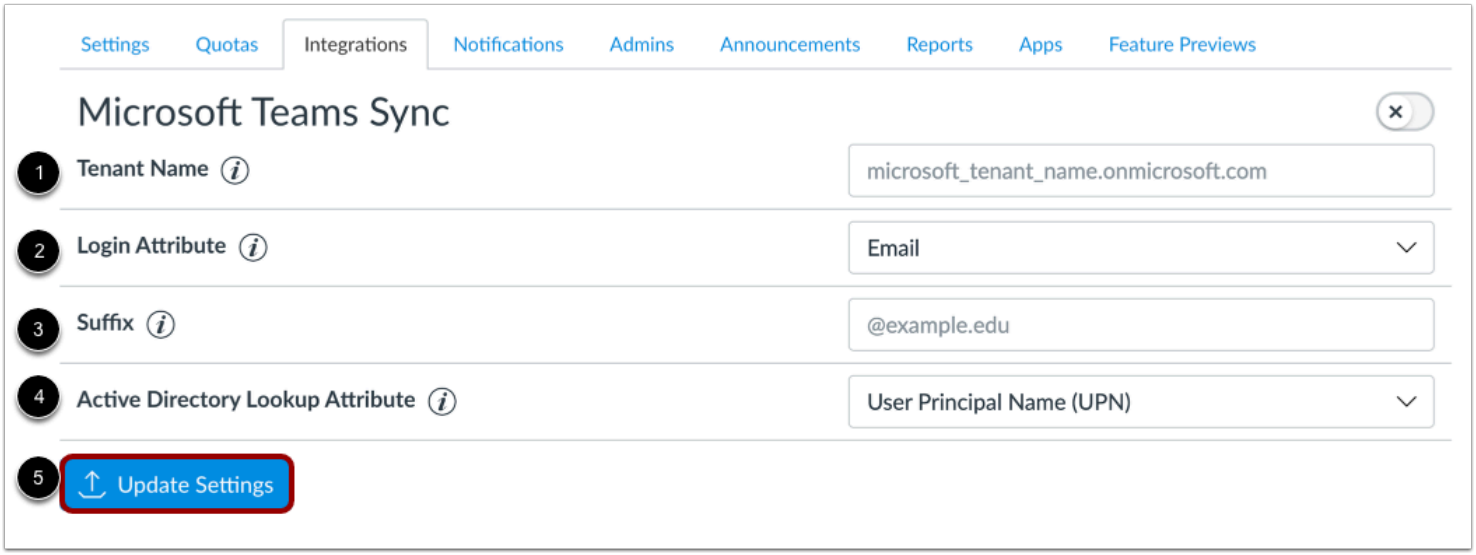
In Account Navigation, click the **Settings** link.

Open Integrations



From the Account Settings page, click the **Integrations** tab.

Enter Microsoft Teams Details



Enter your Azure Active Directory tenant name in the **Tenant Name** field [1].

Select the attribute to use when associating a Canvas user with a Microsoft user in the **Login Attribute** drop-down menu [2]. You can select the user's default Canvas email, unique user ID (such as the user's login_id or Canvas API's pseudonymunique_id), SIS user ID, and integration ID.

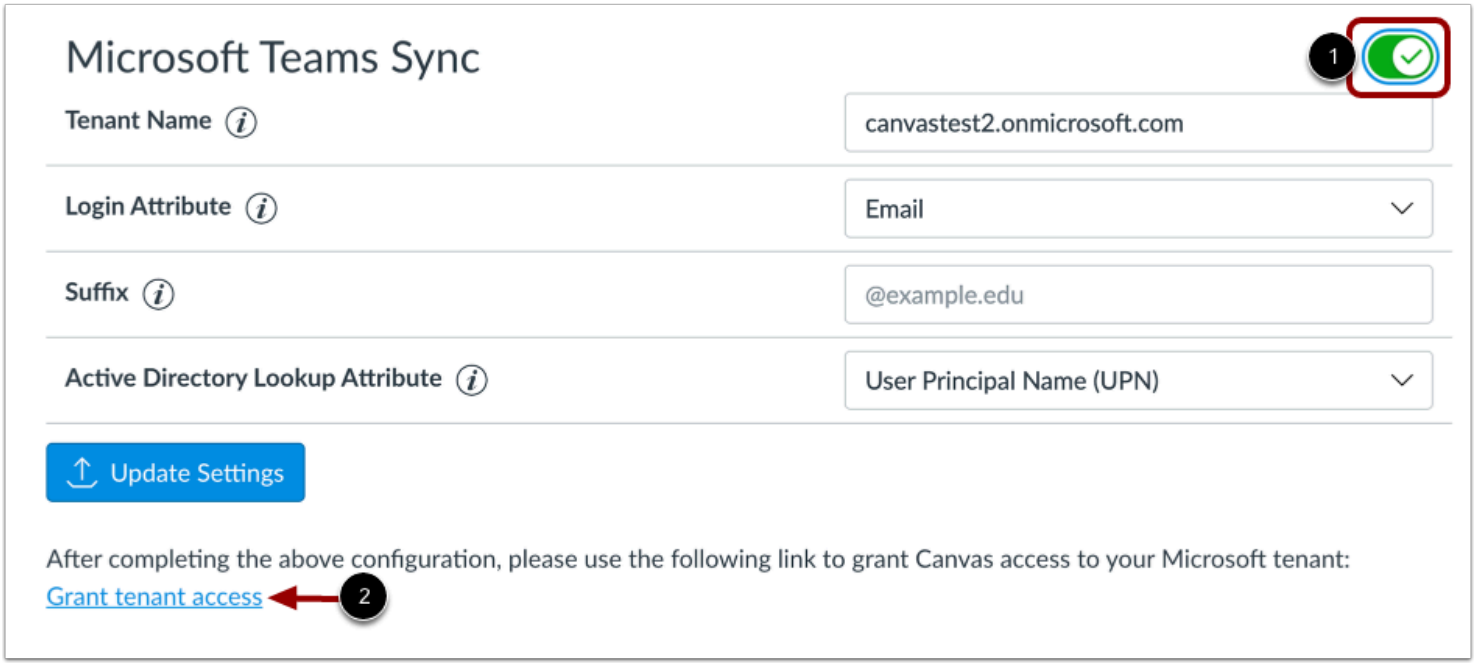
If the **Suffix** field is populated [3], the entered text attaches to the Login Attribute.

Select the attribute to use to match a Canvas user to a Microsoft user in the **Active Directory Lookup Attribute** drop-down menu [4]. You can select user principal name (UPN), primary email address (mail), and email alias (mailNickname).

To update the details, click the **Update Settings** button [5].

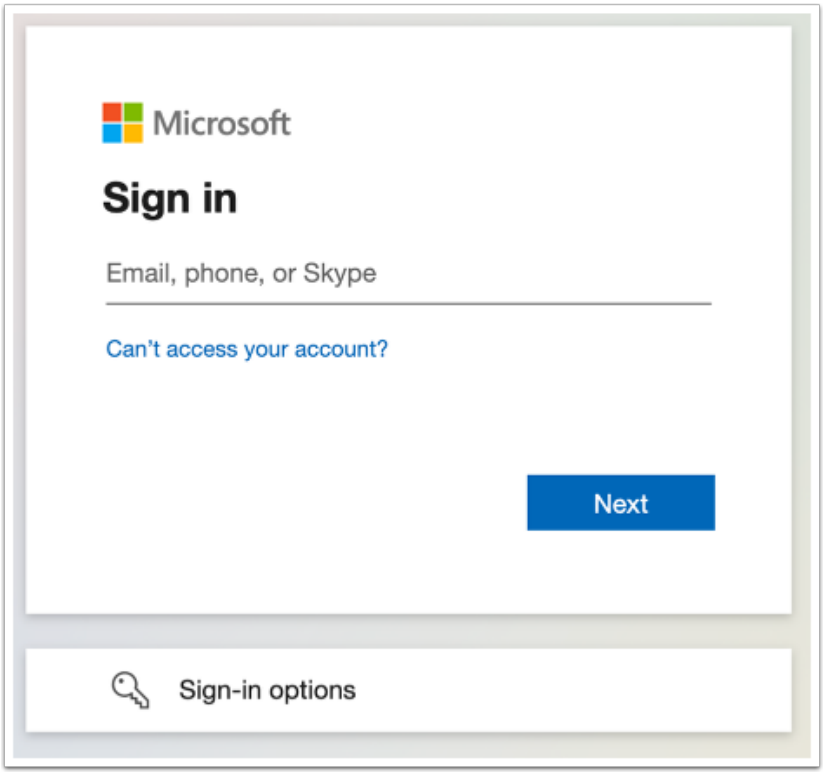
Note: When the Email login attribute is selected, only the user's primary Canvas email address is used in the course sync.

Enable Sync



To enable Microsoft Teams sync in your Canvas account, click the **Sync** button [1]. Then click the **Grant tenant access** link [2].

Log In to Microsoft



Use your Microsoft credentials to log in to your Microsoft Teams account. Logging in to your account grants Canvas access to your Microsoft tenant.

Note: Granting access to your Microsoft tenant should be completed by the Microsoft 365 admin at your institution.

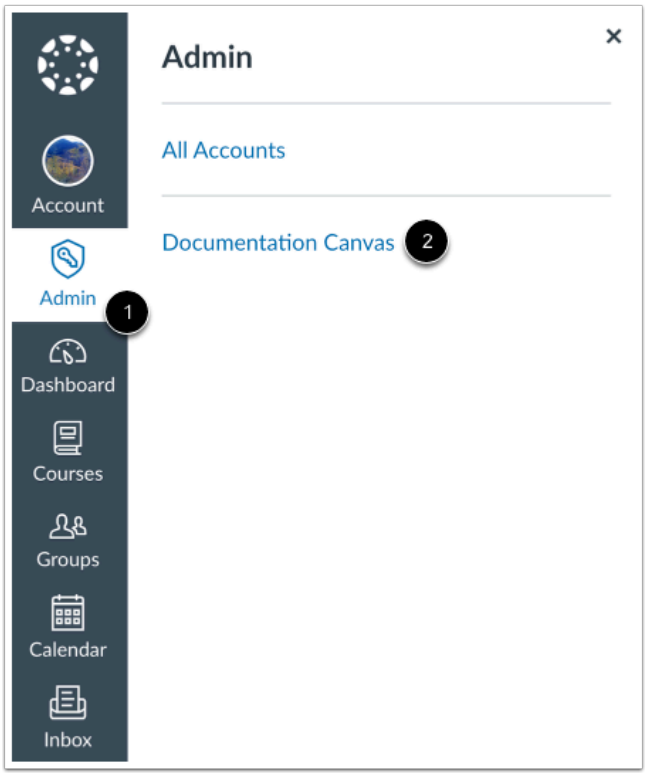
How do I manage developer keys for Canvas Portfolio?

Canvas Portfolios is an LTI 1.3 tool that gives learners a structured space to collect, reflect on, and showcase evidence of their learning. It also provides educators with tools to track progress, offer feedback, and support skill and competency development, helping students demonstrate growth and present a cohesive view of their academic achievements.

Notes:

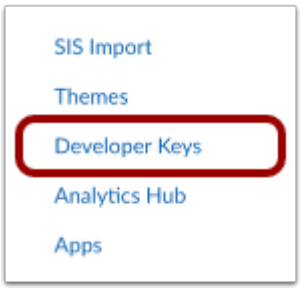
- This tool is enabled by default for all institutions.
- Admins can also update the placement of Canvas Portfolio.

Open Account



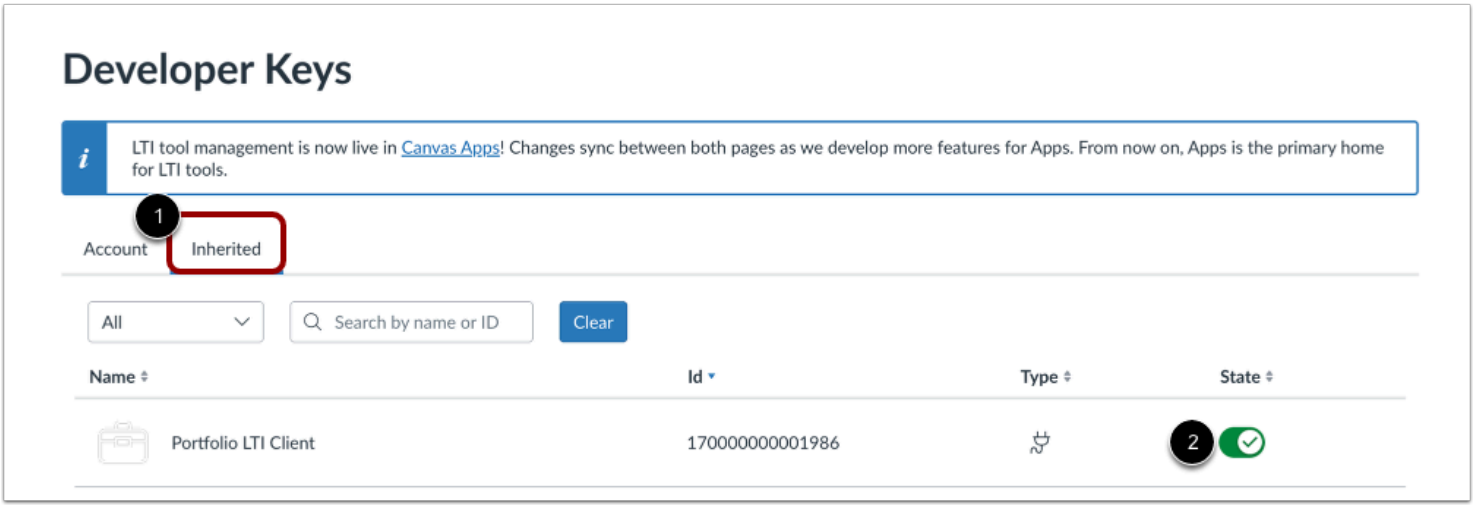
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Developer Keys



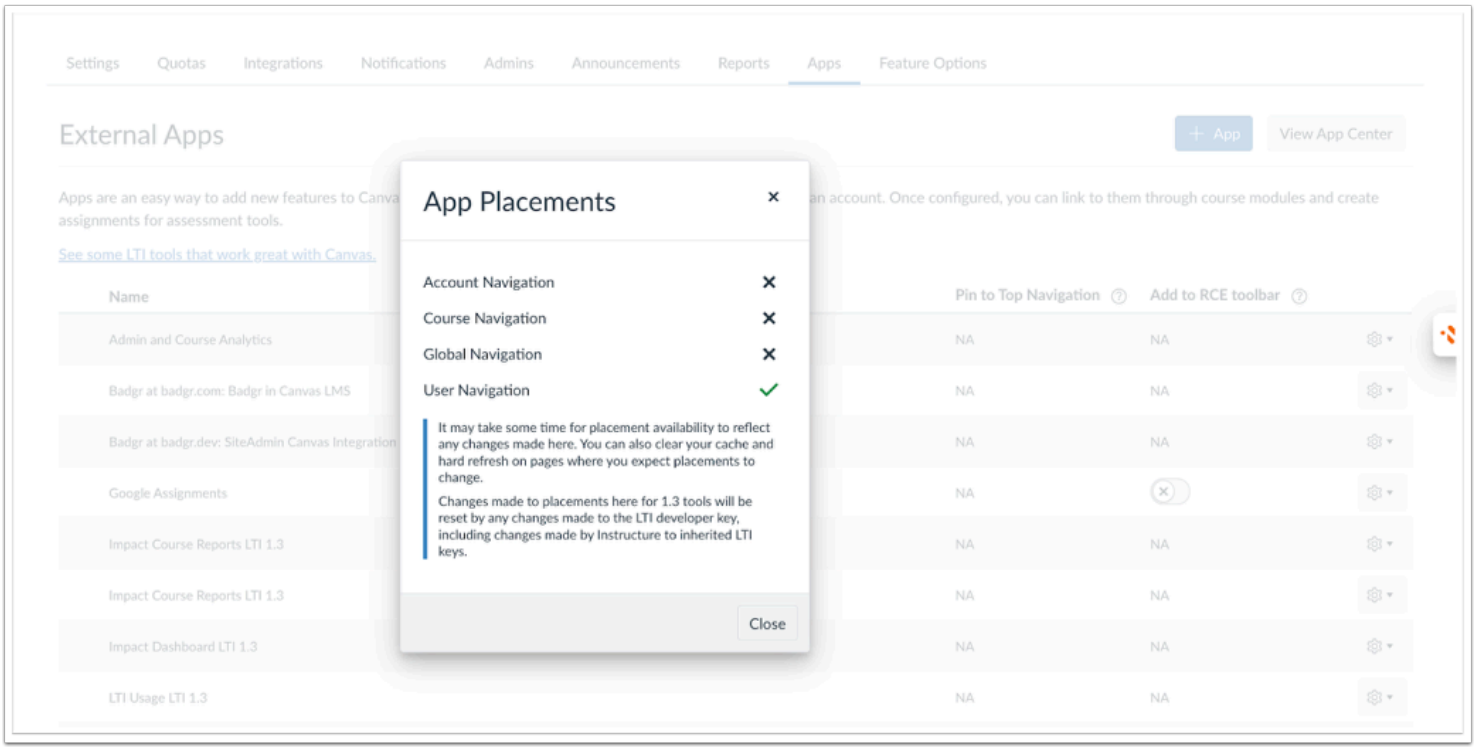
In Account Navigation, click the **Developer Keys** link.

Disable Canvas Portfolio



Click the **Inherited** tab [1], then locate the **Portfolio LTI Client** toggle. Click the toggle [2] to disable Canvas Portfolios.

View App Placement Modal

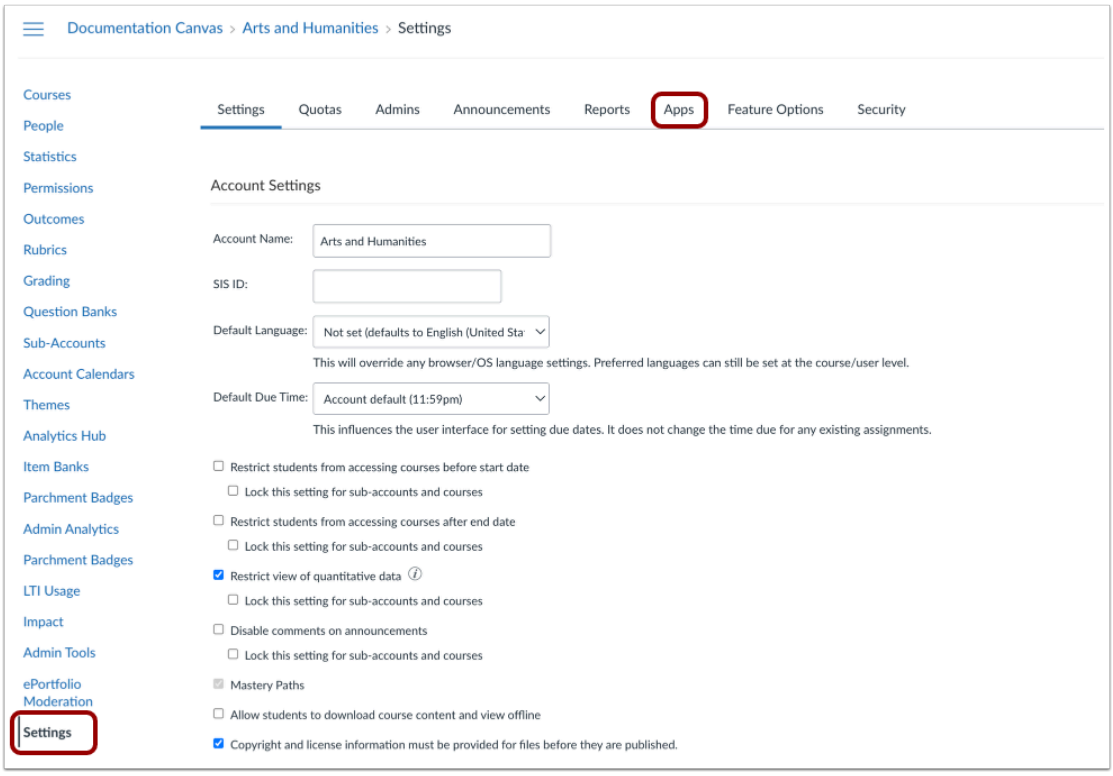


In the Account Settings Apps tab, you can change the placement of the feature.

For more information, visit our guide on How do I manage external app placements for an account?

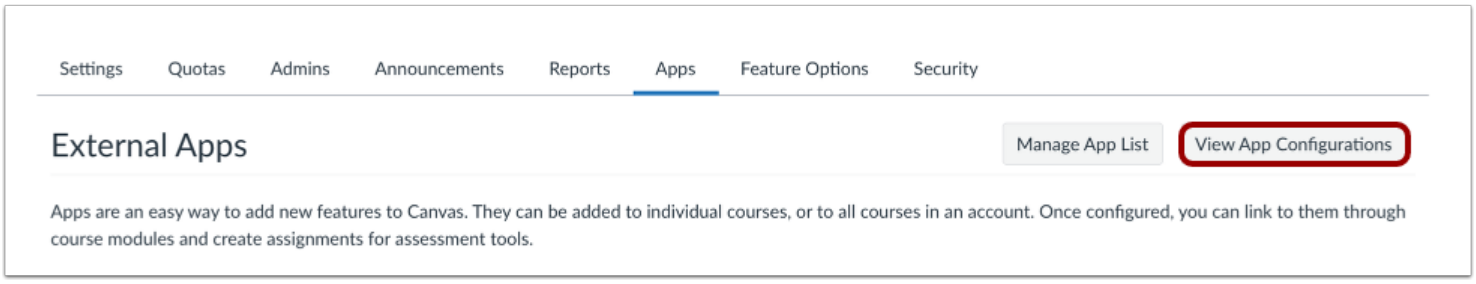
Add to Sub-Account

Open Settings



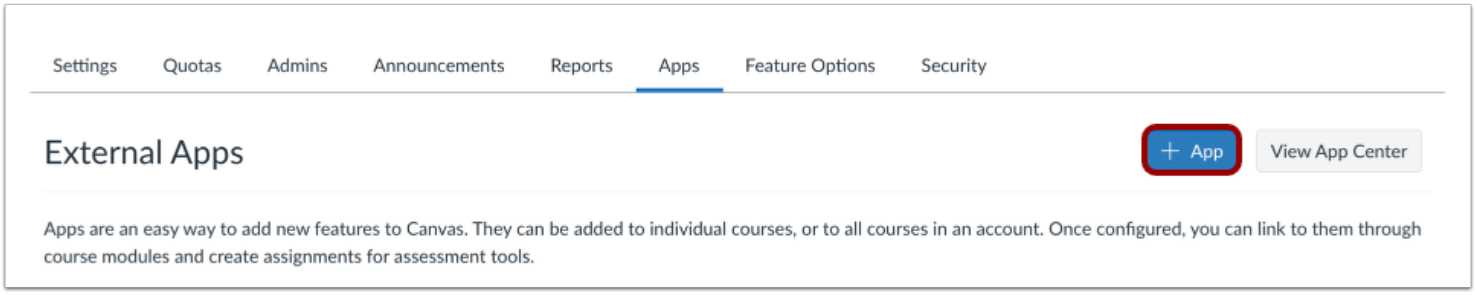
In a Sub-Account, click the **Settings** link [1]. Then, click the **Apps** tab [2]

App Configuration



Click the **View App Configuration** button.

Add App



Click the **Add App** button.

Client ID



Click the **Configuration Type** drop-down menu and select **By Client ID** [1]. Enter **170000000001986** to the Client ID field and click the **Submit** button [3].

Item Banks

How do I create a New Quizzes item bank for an account?

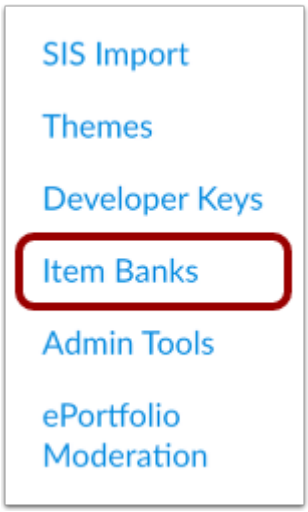
As an admin, you can create an account-level item bank. You can add content to an item bank by importing a QTI file or manually creating questions.

Once an item bank is created, it can be shared with an entire institution, sub-accounts, or with individual users. Learn more about managing New Quizzes item banks in your account.

Notes:

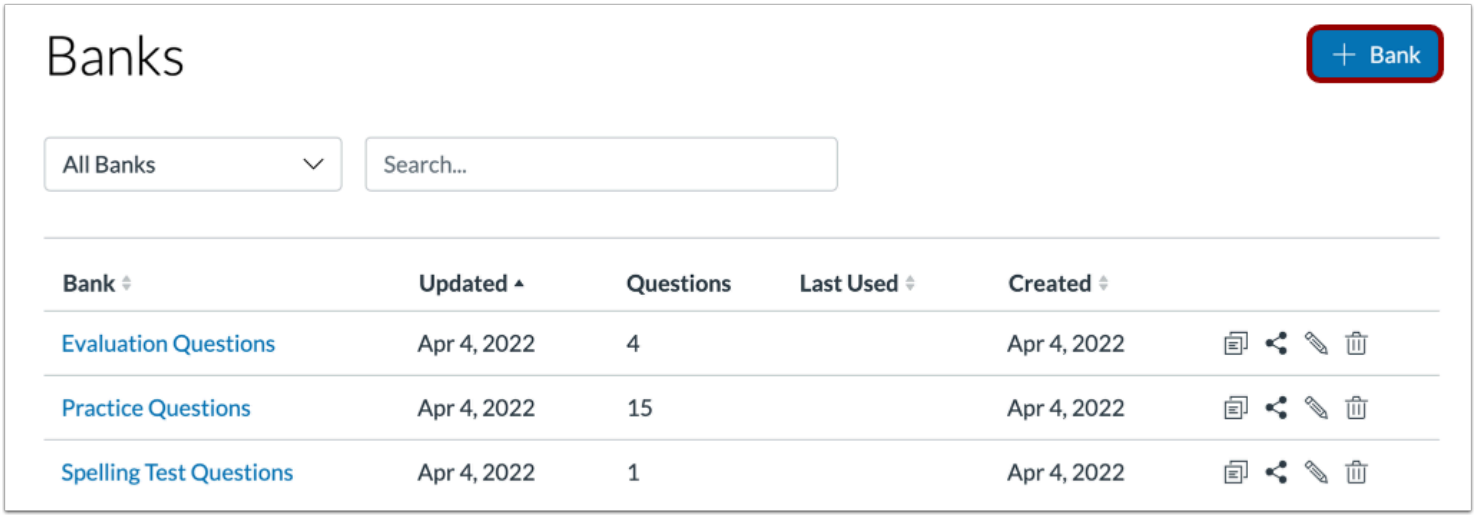
- In order to view all account item banks, users must have the Item Banks - account manage permission.
- To share item banks with sub-accounts, users must have the Item Banks - share with sub-account permission.

Open Item Banks



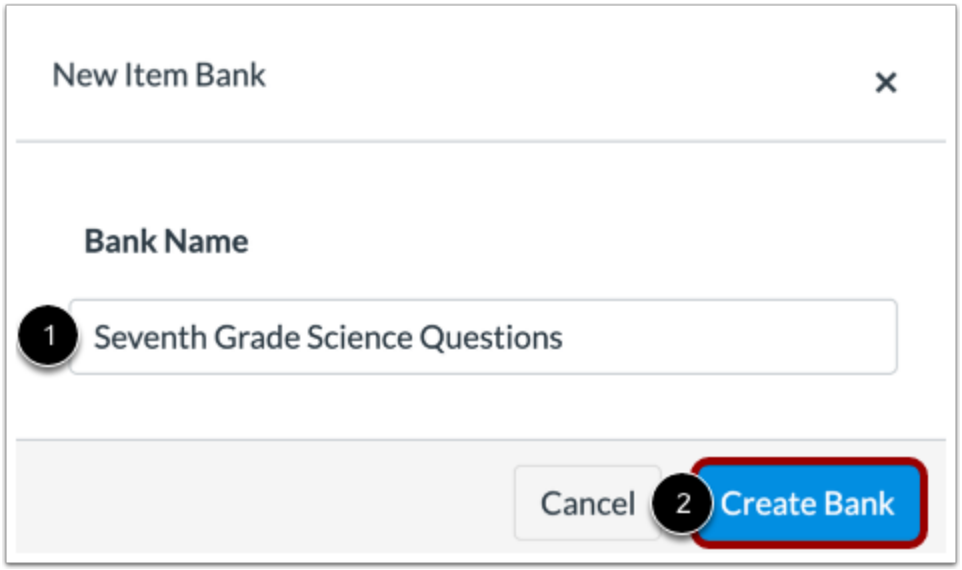
In Account Navigation, click the **Item Banks** link.

Add Item Bank



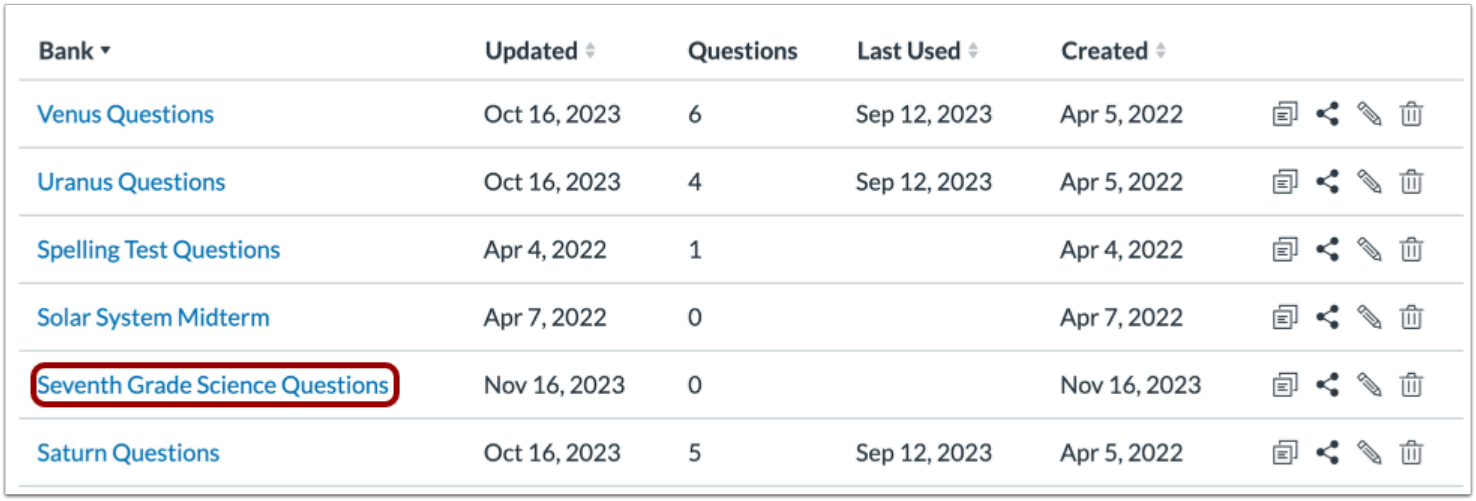
Click the **Add Bank** button.

Enter Bank Name



In the **Bank Name** field, enter a name for your item bank [1]. Then click the **Create Bank** button [2].

View Item Bank



Bank	Updated	Questions	Last Used	Created
Venus Questions	Oct 16, 2023	6	Sep 12, 2023	Apr 5, 2022
Uranus Questions	Oct 16, 2023	4	Sep 12, 2023	Apr 5, 2022
Spelling Test Questions	Apr 4, 2022	1		Apr 4, 2022
Solar System Midterm	Apr 7, 2022	0		Apr 7, 2022
Seventh Grade Science Questions	Nov 16, 2023	0		Nov 16, 2023
Saturn Questions	Oct 16, 2023	5	Sep 12, 2023	Apr 5, 2022

View your item bank. To open your item bank, click the name of the bank.

Learn how to manage item banks from the Item Banks page.

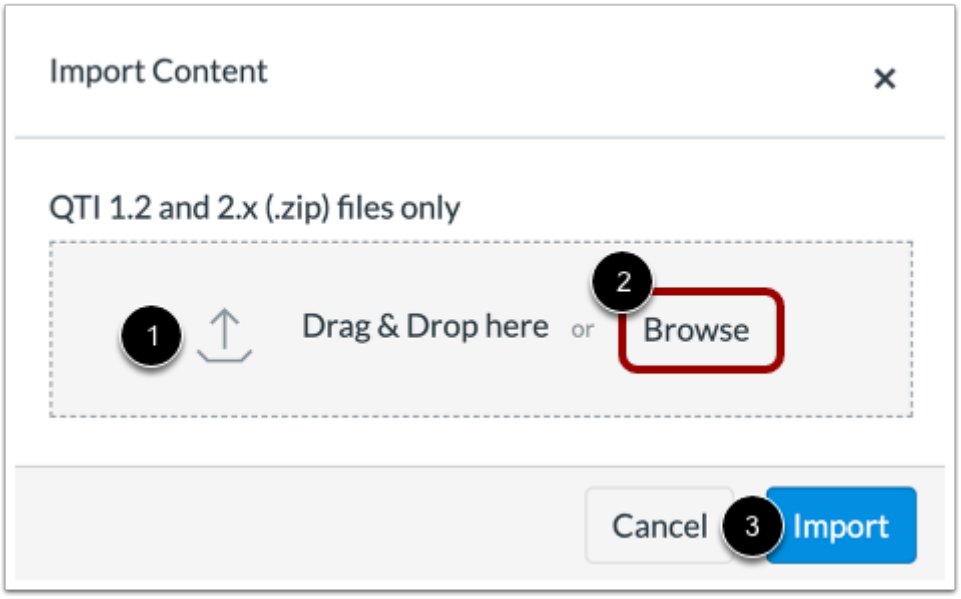
Import Content



If you have not added any content to your item bank, you can import content to your item bank from a QTI file.

To import a QTI file, click the **Options** icon [1] and click the **Import Content** option [2].

Select QTI File

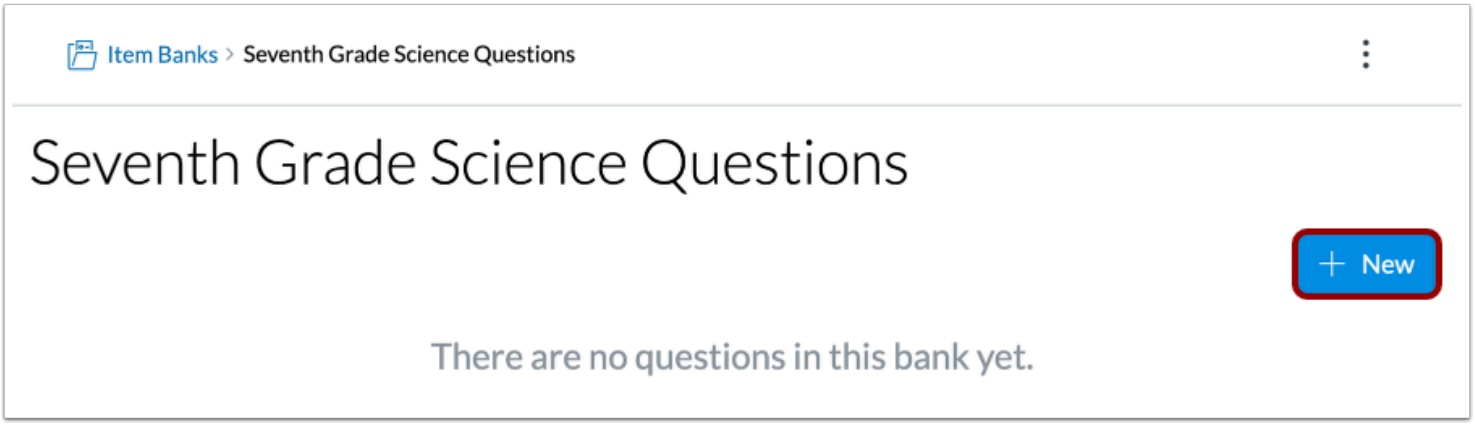


To add a QTI file, drag and drop the file into the **Drag & Drop here** field [1] or click the **Browse** button to select a file from your computer [2].

To import the file, click the **Import** button [3].

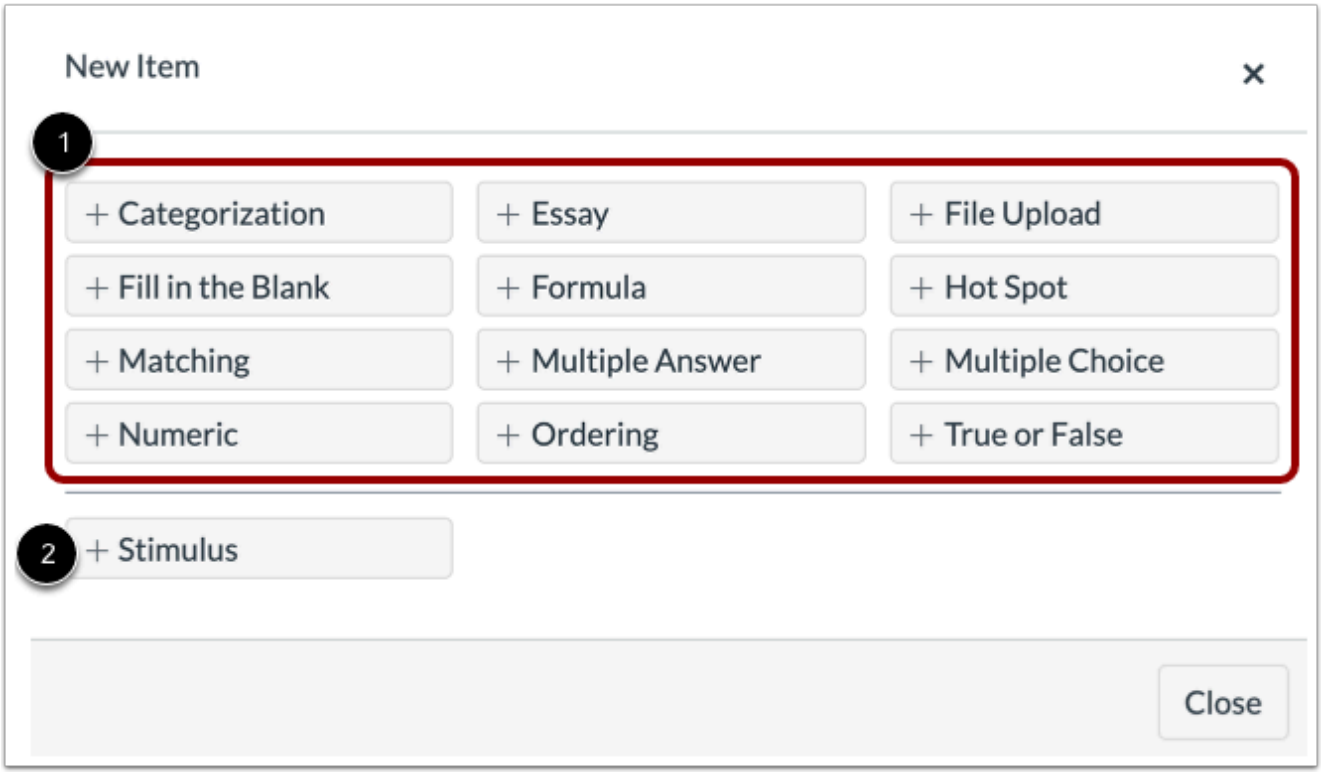
Note: New Quizzes only supports imports from QTI 1.2 and 2.x versions. However, some QTI 1.2 and 2.x 3rd party packages include software-specific item types which may not be supported.

Add New Question



To create a new question in your item bank, click the **Add New** button.

Select Question Type

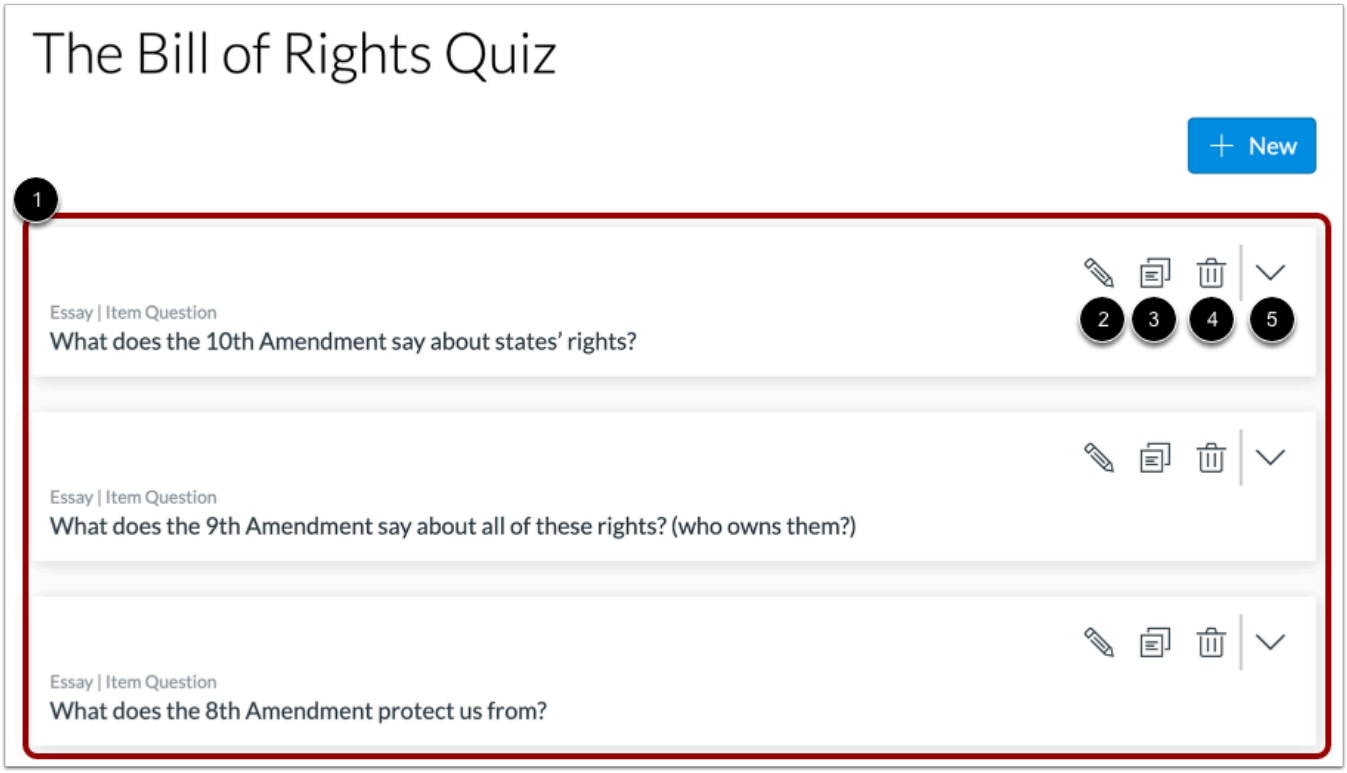


To create a new question, click the button for the question type [1] or add stimulus content [2].

The following question types are available in New Quizzes:

- Categorization
- Essay
- File Upload
- Fill in the Blank
- Formula
- Hot Spot
- Matching
- Multiple Answer
- Multiple Choice
- Numeric
- Ordering
- True or False

View Item Bank Questions



View your item bank questions [1]. To edit a question, click the **Edit** icon [2].

To copy or move a question to another item bank, click the **Copy** icon [3].

To delete a question, click the **Delete** icon [4].

To view more details about a question, click the **Details** icon [5].

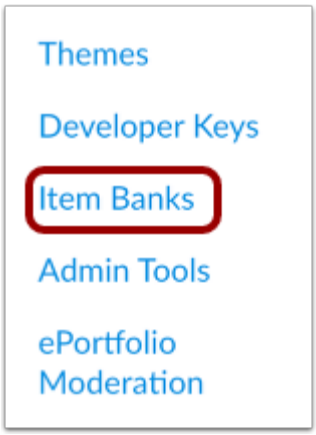
How do I manage New Quizzes item banks shared with an account?

You can manage New Quizzes item banks that have been shared with your institution. You can stop sharing item banks with your institution, edit item banks, or delete item banks. You can also create a new item bank as an admin.

Notes:

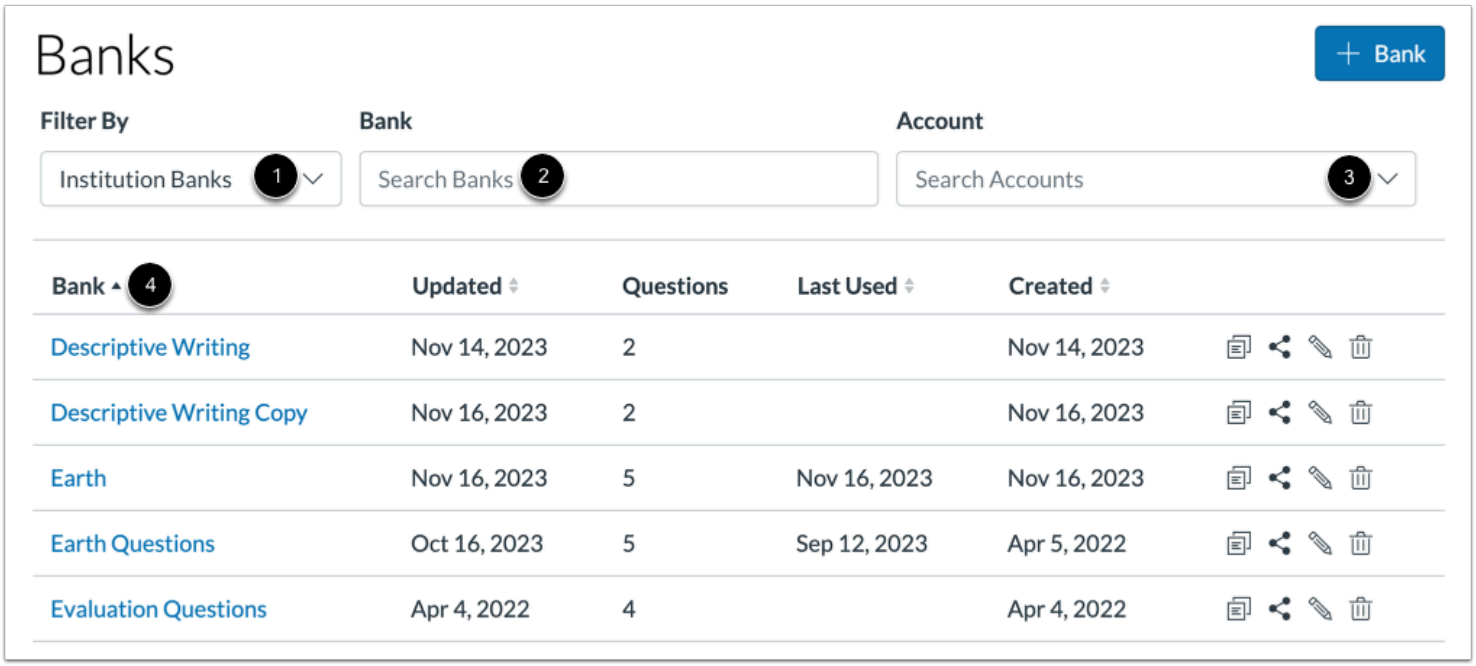
- In order to view all account item banks, users must have the Item Banks - account manage permission.
- To share item banks with sub-accounts, users must have the Item Banks - Share with Sub-Accounts permission.
- Item Banks management is unavailable at the account level if the New Quizzes feature option is disabled at the account level.

Open Item Banks



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

View Item Banks



To filter by institution bank, shared with me banks or banks shared with the course, click the Filter by drop-down menu [1].

To search for a specific item bank, enter a search term in the **Search** field [2].

To search for a specific account, click the Account drop-down menu [3]

To change the item bank sort order from ascending to descending, click the **Sort** button [4].

Note: When the Item Banks - Share with Sub-Accounts permission is enabled, you can filter by that sub-account.

Add Item Bank



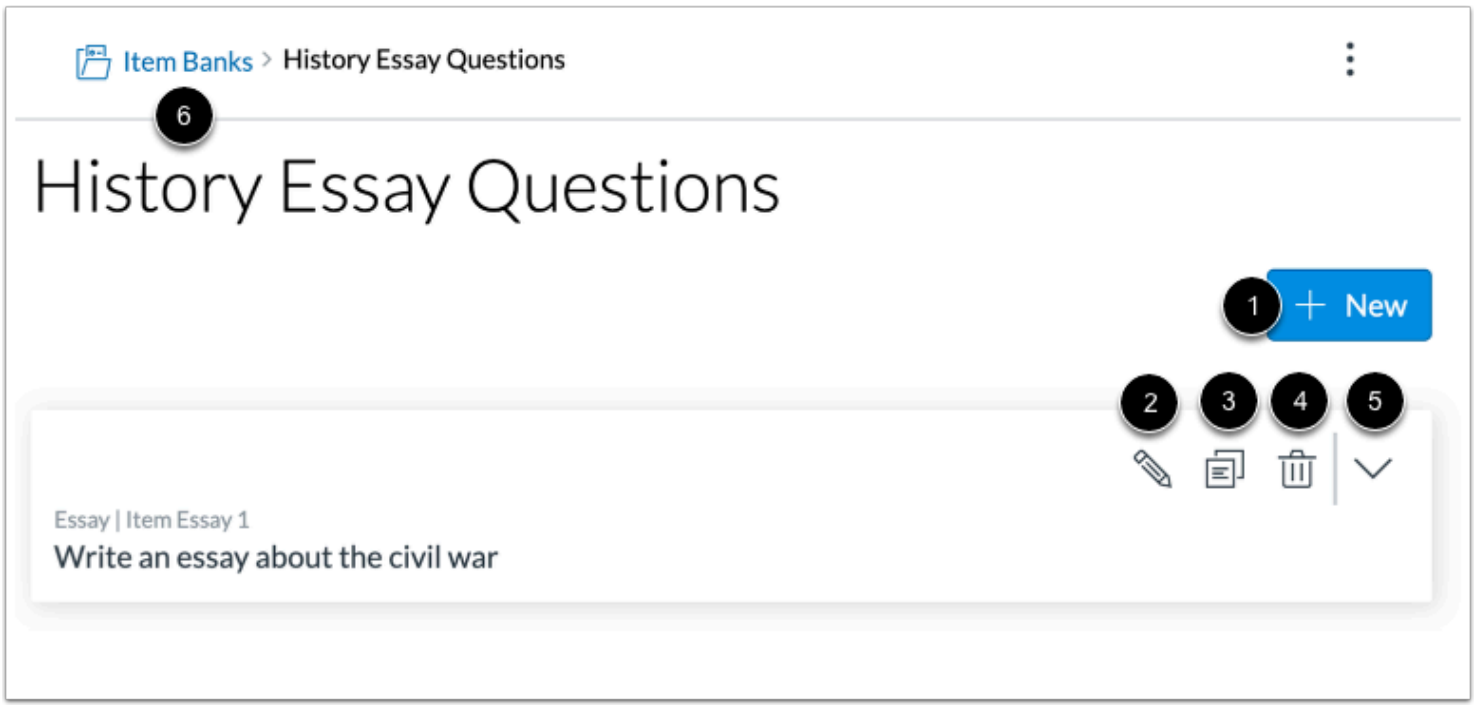
To create a new item bank, click the **Add Bank** button. Learn more about creating an item bank as an admin.

Edit Item Bank Items



To manage item bank items, click the name of an item bank.

Manage Item Bank Items



To add a new item to the item bank, click the **Add New** button [1]. Learn more about adding a new item to an item bank.

To edit an item bank item, click the **Edit** icon [2]. Learn more about editing item bank items.

To move or copy an item bank item, click the **Copy** icon [3]. Learn more about moving and copying item bank items.

To delete an item bank item, click the **Delete** icon [4].

To view item details, click the **Expand item details** icon [5].

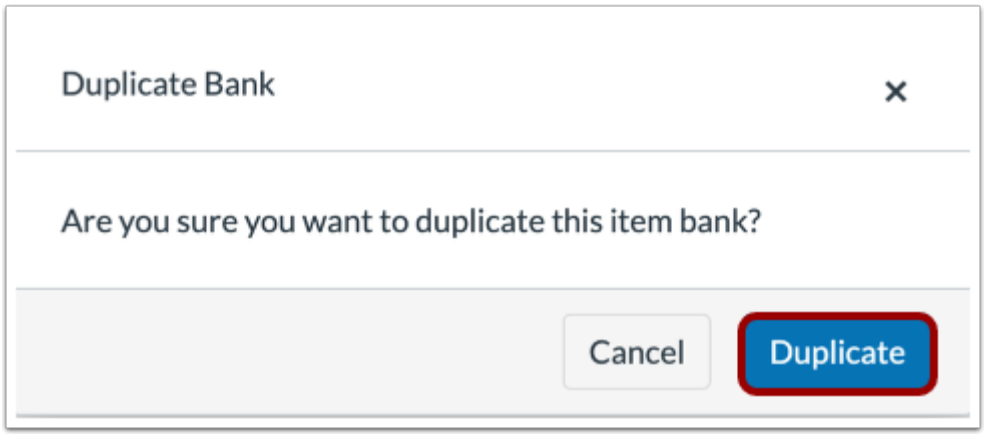
To return to all item banks, click the **Item Banks** link [6].

Duplicate Item Bank



To duplicate an item bank, click the **Duplicate** icon.

Confirm Duplication



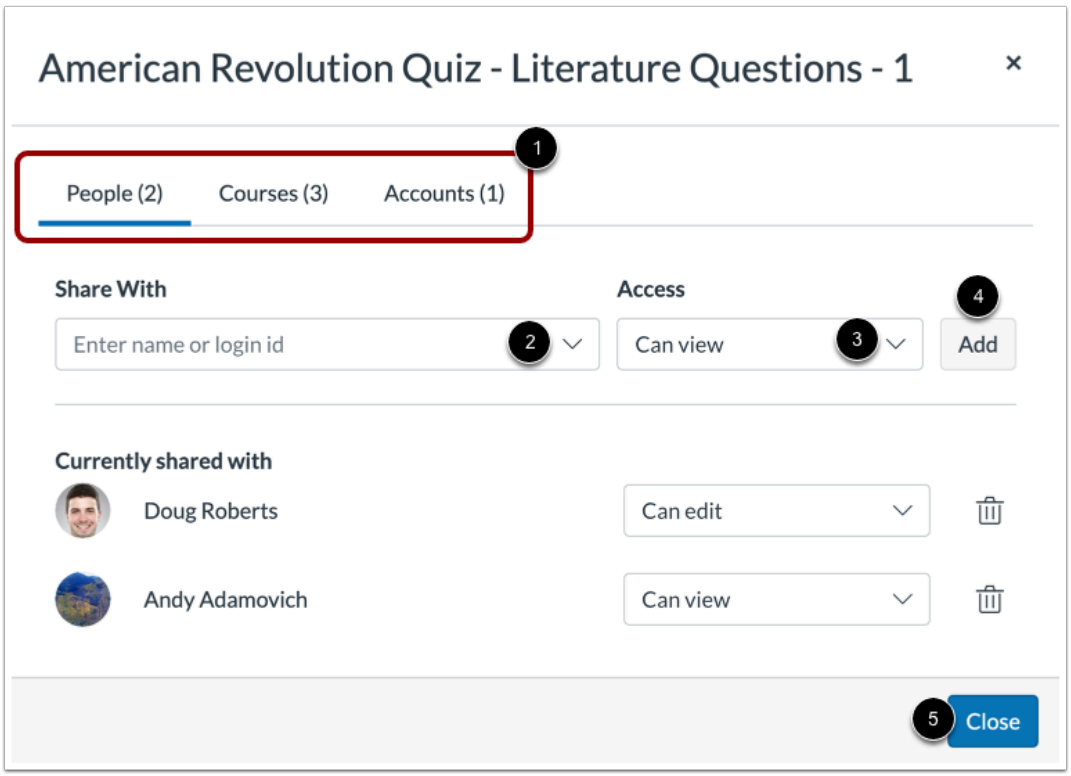
To confirm duplication, click the **Duplicate** button. Note: Duplicated item banks include "Copy" at the end of the bank name.

Share Item Bank



To manage sharing settings for an item bank, click the **Share** icon.

Set Sharing Settings



You can share an item bank with users, courses, and sub-accounts [1].

To share the item bank with specific users, courses, or sub-accounts type a user, course, or sub-account name in the **Share With** field [2].

You can set access to Can view, which allows users to view item banks in a read-only state, or Can edit, which allows users to view and edit the item bank [3].

To set access settings you're sharing with, click the **Access** drop-down menu [4]. You can set access to view or edit.

To share the item bank with the specified user(s) or course(s), click the **Add** button [5].

To save your sharing settings, click the **Close** button [6].

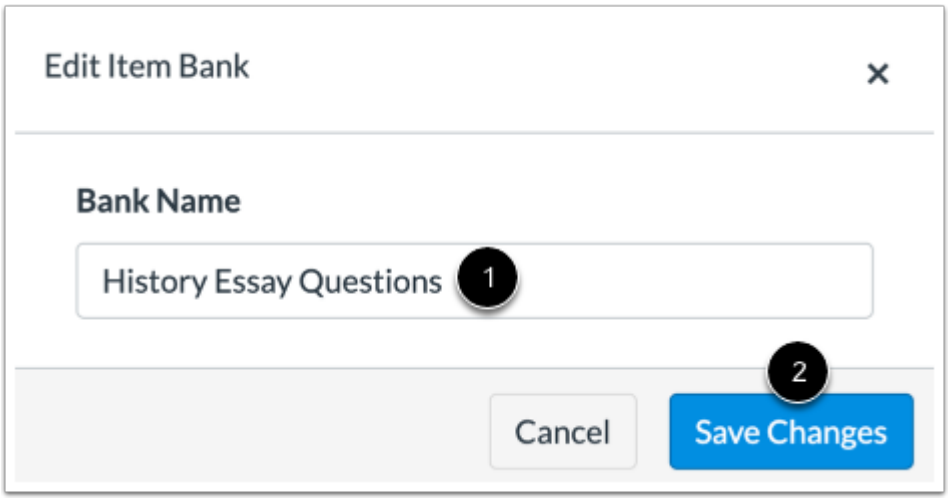
Note: When the Item Banks - Share with Sub-Accounts permission is enabled, you can share to sub-accounts.

Edit Item Bank



To edit the name of an item bank, click the **Edit** icon.

Edit Item Bank Name



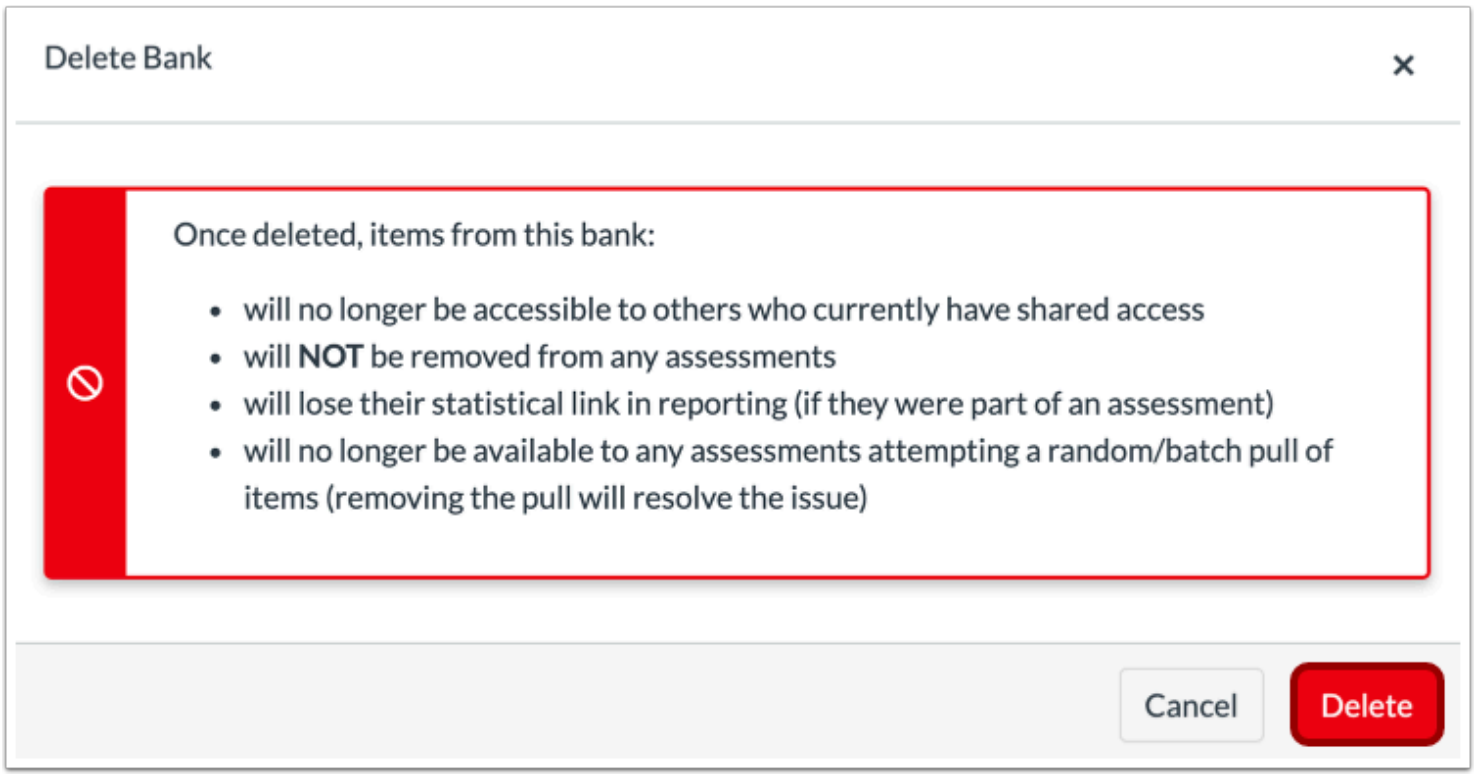
To change the name of the item bank, type a new name in the **Bank Name** field [1], then click the **Save Changes** button to save the new name [2].

Delete Item Bank



To delete an item bank, click the **Delete** icon.

Confirm Deletion



To confirm item bank deletion, click the **Delete** button.

Deleting an item bank will cause the following to apply to items in the item bank:

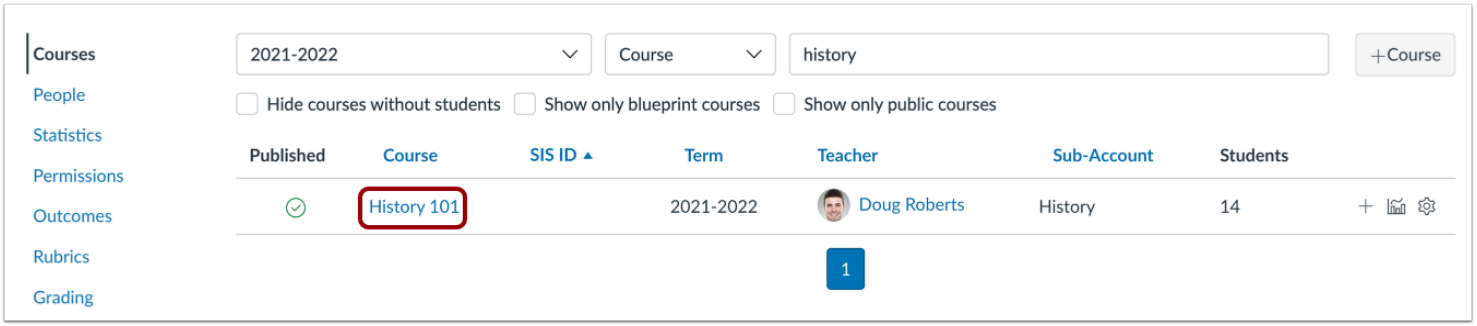
- Items will no longer be accessible to others who currently have shared access.
- Items will not be removed from any assessments
- Items will lose their statistical link in reporting (if they were part of an assessment)
- Items will no longer be available to any assessments attempting a random/batch pull of items (removing the pull will resolve the issue)

How do I share a New Quizzes item bank from a course with an account?

As a Canvas admin, you can share a New Quizzes item bank from a course with your entire account if the Item Banks - manage accounts permission is enabled. If the Item Banks - share with sub-accounts permission is enabled, you can share a New Quizzes item bank with sub-accounts that you are associated with.

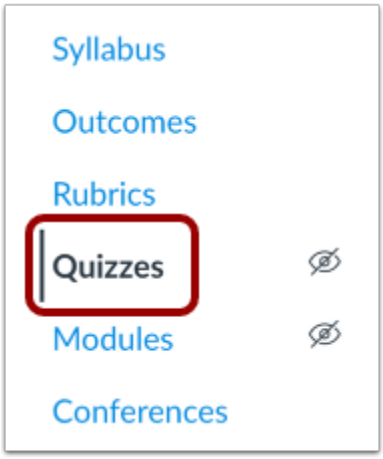
Note: In order to view all account item banks, users must have the Item Banks - account manage permission.

Open Course



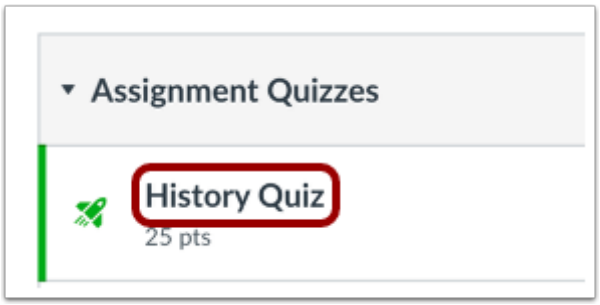
Click the name of the course where the item bank is located.

Open Quizzes



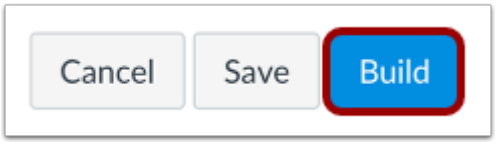
In Course Navigation, click the **Quizzes** link.

Open Quiz



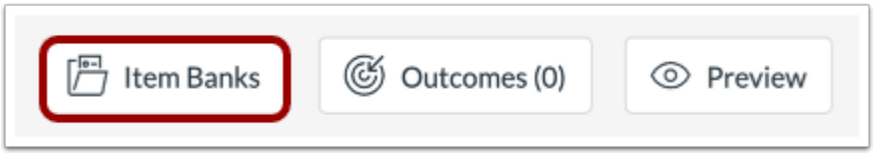
Click the title of any New Quizzes assessment in the course.

Open New Quizzes



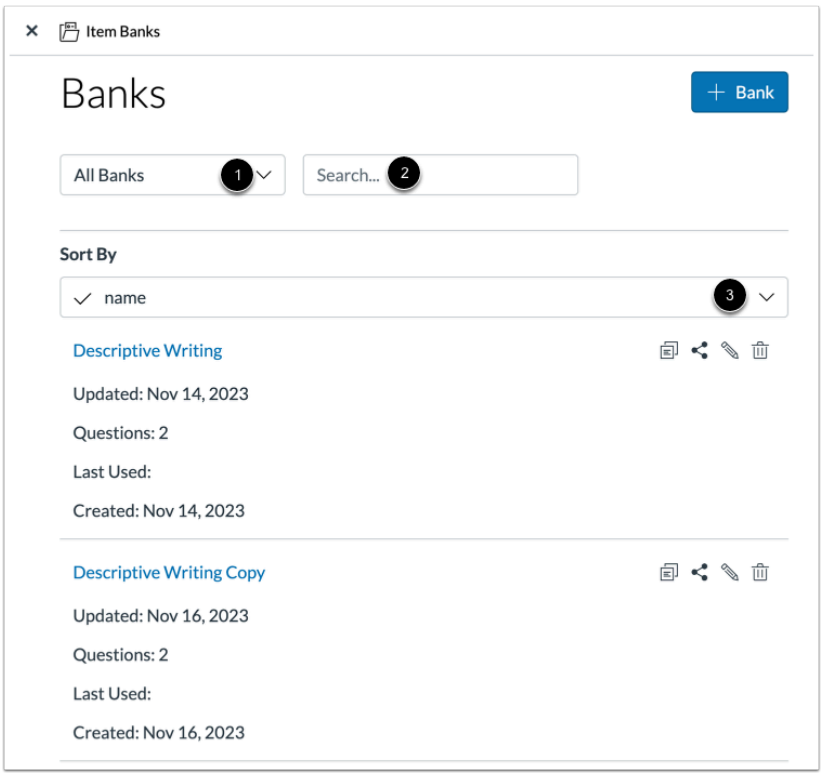
To open the New Quizzes build tool, click the **Build** button.

Open Item Banks



To open the Item Banks sidebar, click the **Item Banks** button.

View Item Banks

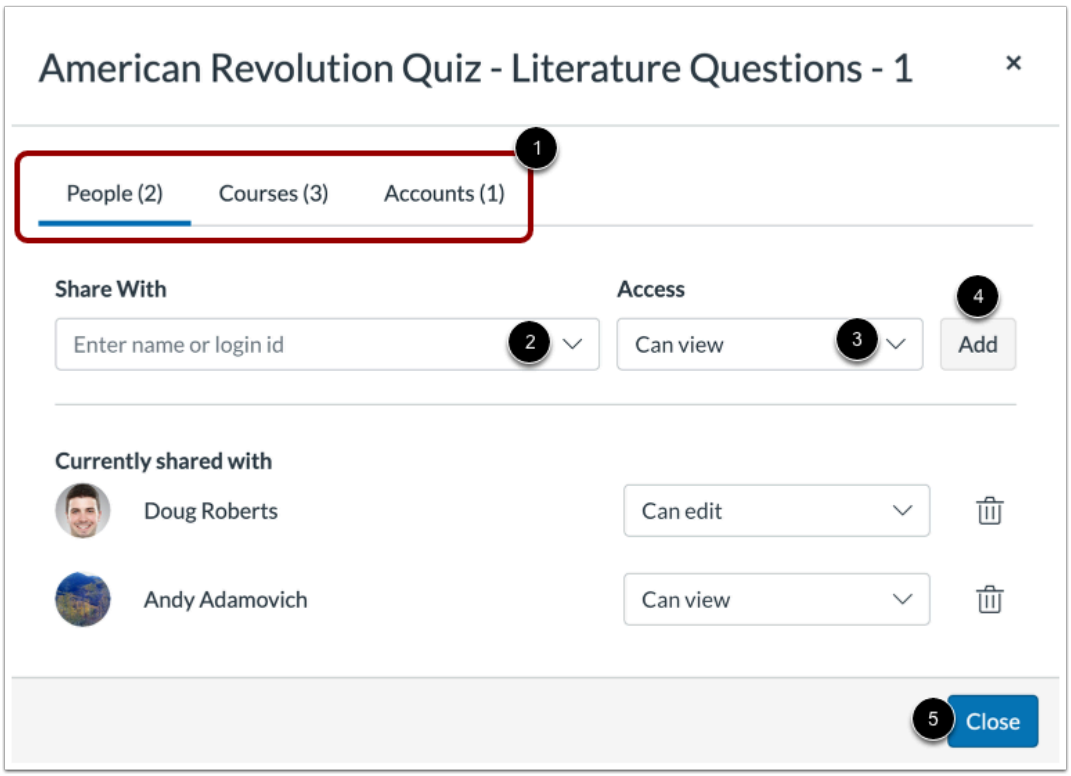


To filter by all banks, account item banks or banks shared with the course, click the Item Banks drop-down menu [1].

To search for a specific item bank, type a keyword in the **Search** field [2].

To sort item banks by item bank name, date last used, or date last updated, click the **Sort by** drop-down menu [3].

Share Item Bank



You can share an item bank with users, courses, and sub-accounts [1].

You can set access to Can view, which allows users to view item banks in a read-only state, or Can edit, which allows users to view and edit the item bank.

To share the item bank with specific users, courses, or sub-accounts type a user, course, or sub-account name in the **Share With** field [3].

To set access settings you're sharing with, click the **Access** drop-down menu [4]. You can set access to view or edit.

To share the item bank with the specified user(s) or course(s), click the **Add** button [5].

Note: When the Item Banks - Share with Sub-Accounts permission is enabled, you can share to sub-accounts.

Save Item Bank Share



To save the sharing settings, click the **Close** button.

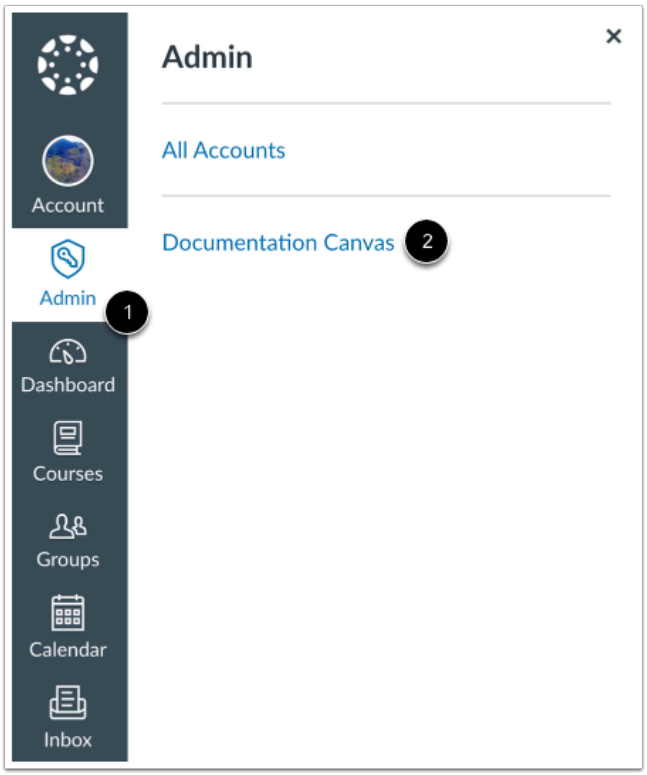
Outcomes

How do I use the outcomes page in an account?

Outcomes are used to track mastery in an account or course. From the account outcomes page, you can create and manage outcomes, create outcome groups, import outcomes, and manage rubrics for an account.

This lesson displays how to use the Outcomes page in the classic Outcomes page view. If the Outcomes page in your account displays differently than the images in this lesson, learn how to use the account outcomes page in an account that has enabled the Improved Outcomes Management feature option.

Open Account



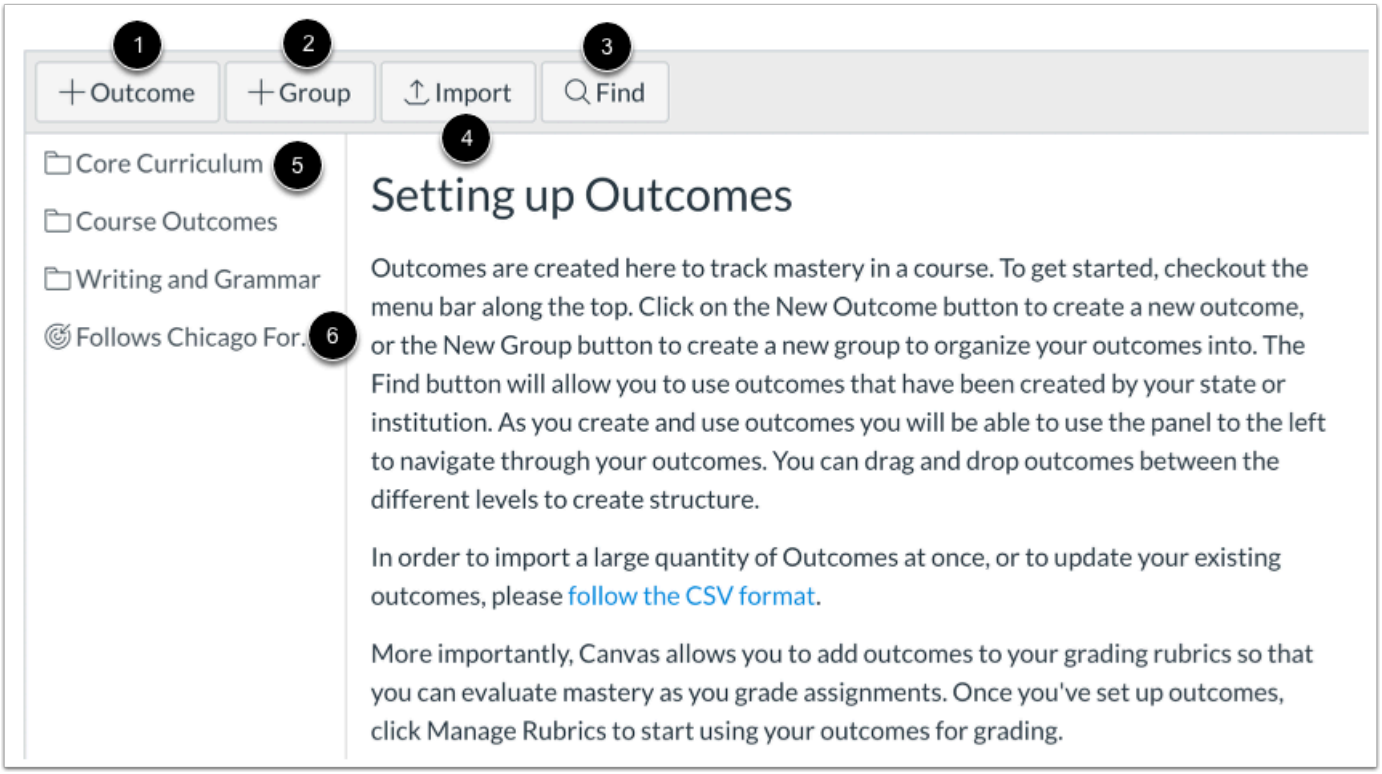
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



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

View Outcomes



On the outcomes page, you can create a new outcome [1], create a new outcome group [2], and find an outcome [3].

If you have permission, you can import an outcome [4].

To view details about an outcome group, click the name of the outcome group [5].

To view an outcome, click the name of the outcome [6].

View Outcome



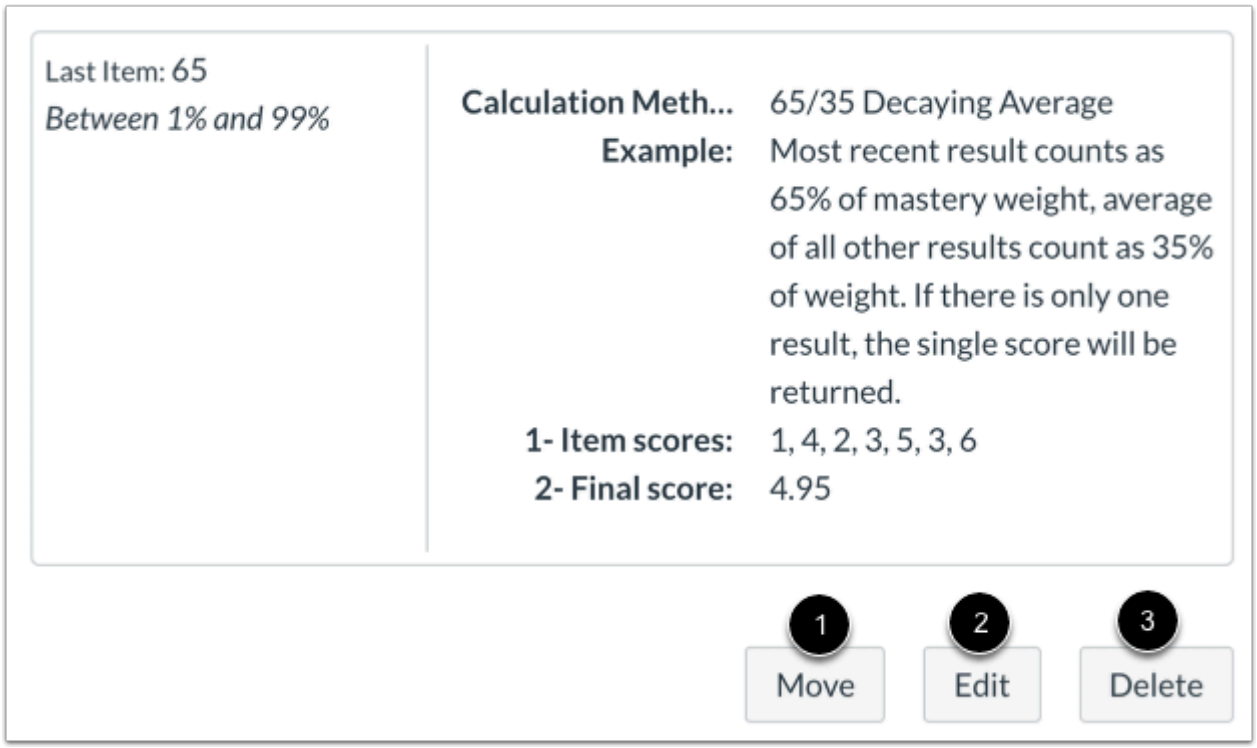
To view an outcome, click the name of the outcome [1].

You can view the outcome description [2], criterion ratings [3], points needed for mastery [4], the calculation method [5], and the calculation method explanation [6].

To view items aligned with the outcome and outcome artifacts, click the outcome title [7].

Note: If mastery scales and calculation methods do not display for your outcome, your institution has enabled account-wide and/or course-wide mastery scales and calculation methods.

Manage Outcome and Outcome Group



You can move [1], edit [2], or delete [3] an outcome or outcome group.

Notes:

- You cannot delete an outcome that has been used to assess students.
- If a rubric includes an outcome that has been used to assess a submission, edits made to the outcome are not reflected in previous rubric assessments.

How do I create an outcome for an account?

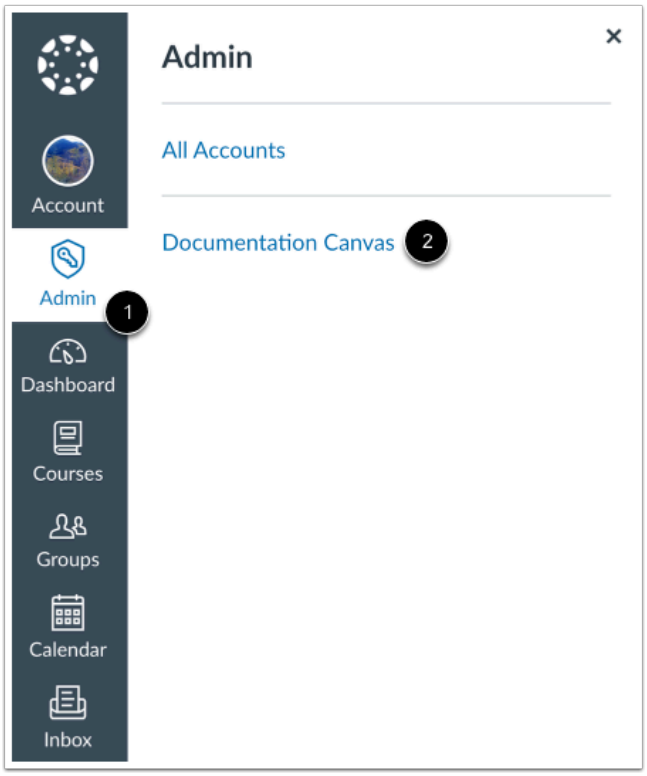
If you cannot find an outcome to use in your account, you can create a new outcome for the account. Outcomes can be created from the account, sub-account, or course level.

Outcomes can be included in assignment rubrics as an easy way to assess mastery of outcomes aligned to specific assignments. When you define a learning outcome, you should also define a criterion that can be used when building assignment rubrics. Define as many rubric columns as you need, and specify a point threshold that will be used to define mastery of this outcome.

View a video about Outcomes.

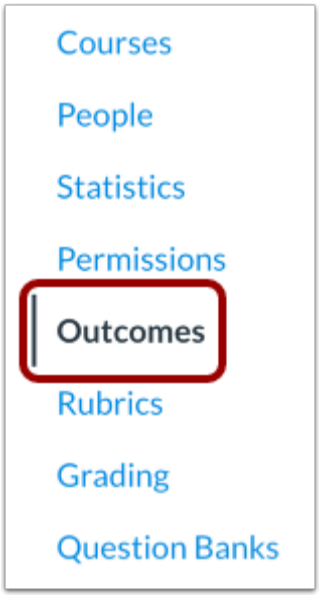
This article displays how to create outcomes in the classic Outcomes page view. If the Outcomes page in your account displays differently than the images in this article, learn how to create outcomes in an account that has enabled the Improved Outcomes Management feature option.

Open Account



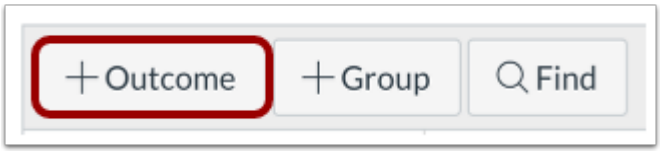
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



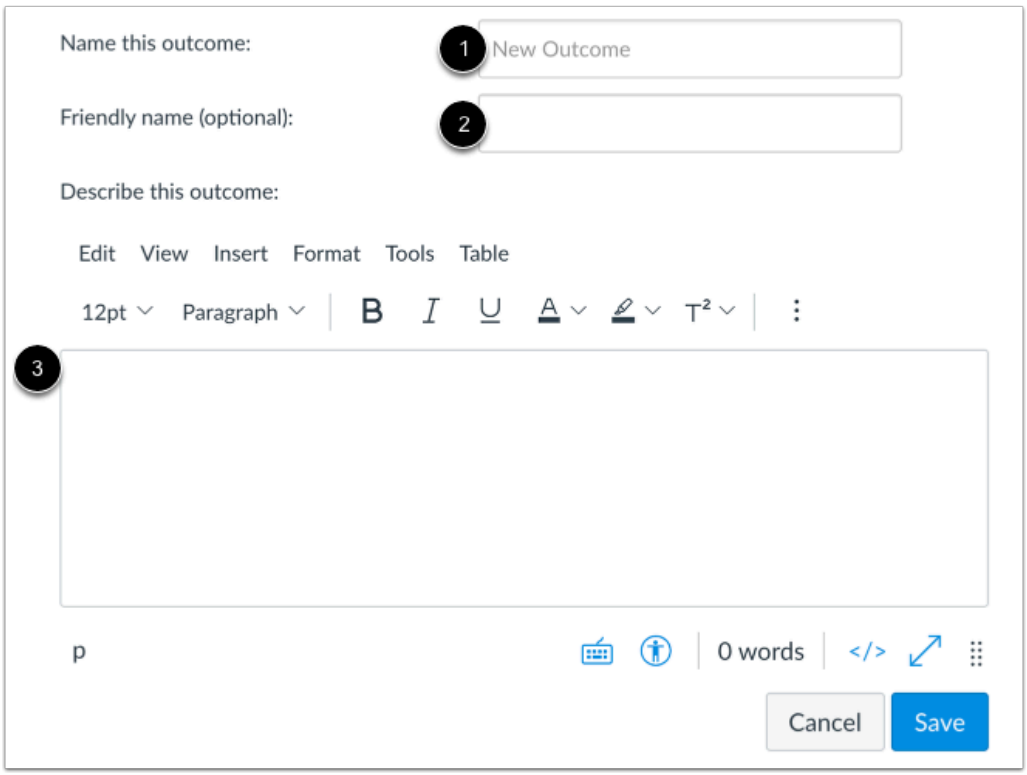
In Account Navigation, click the **Outcomes** link.

Add Outcome



Click the **New Outcome** button.

Create Outcome

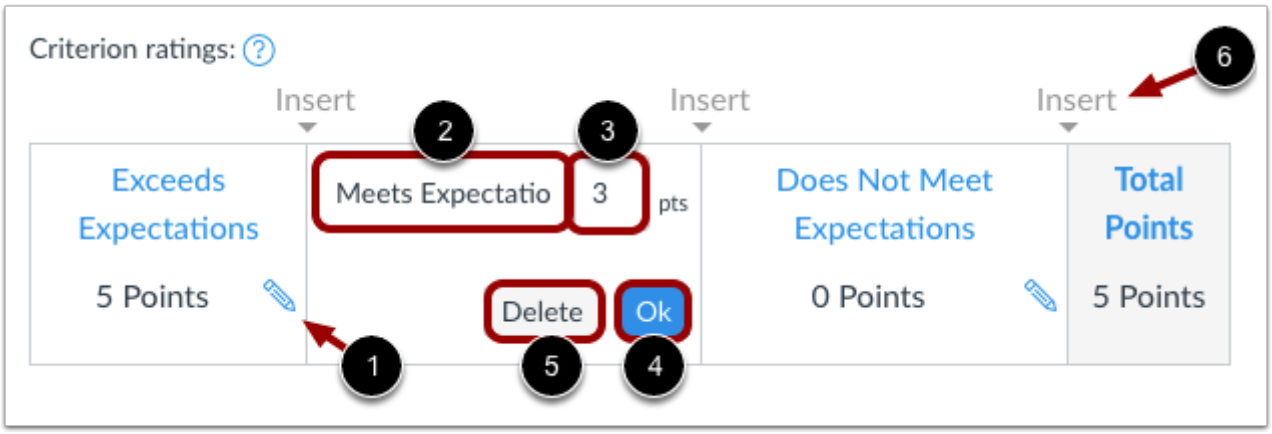


Enter a name for the outcome in the **Name this outcome** field [1].

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, 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



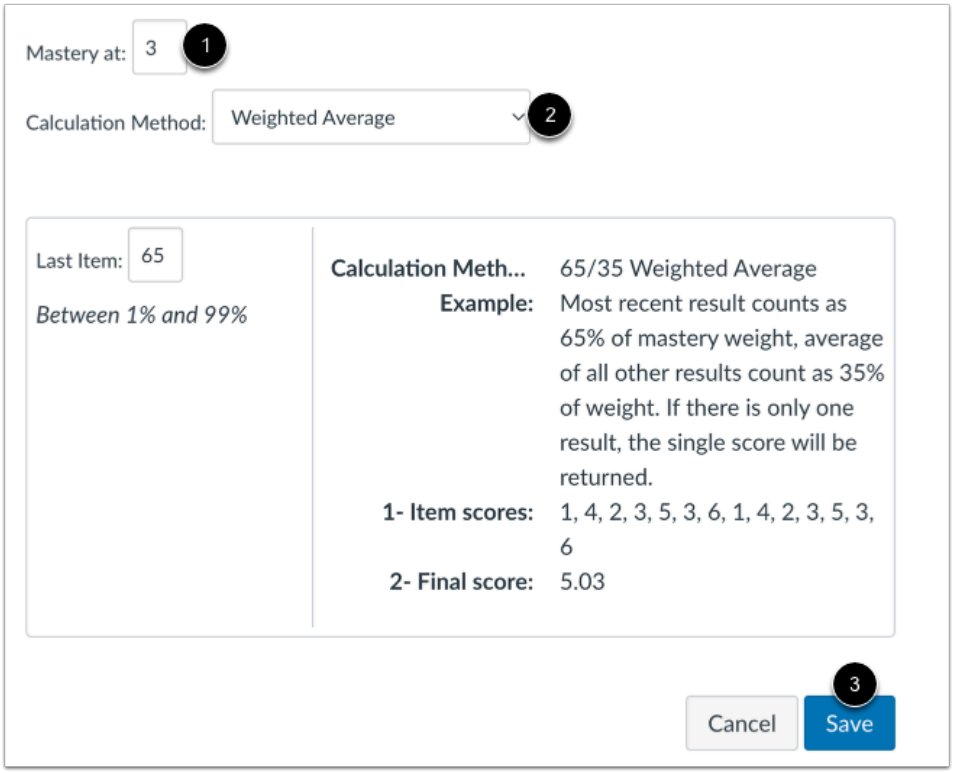
Click the **Edit** icon [1] to edit the criterion rating. You can change the existing name (if desired) for the criterion in the **Criterion Name** field [2]. Set the criterion point value by typing in the **Points** field [3].

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].

Note: If you cannot edit criteria for your outcome, your institution has enabled account-wide mastery scales.

Set Mastery and Calculation Method



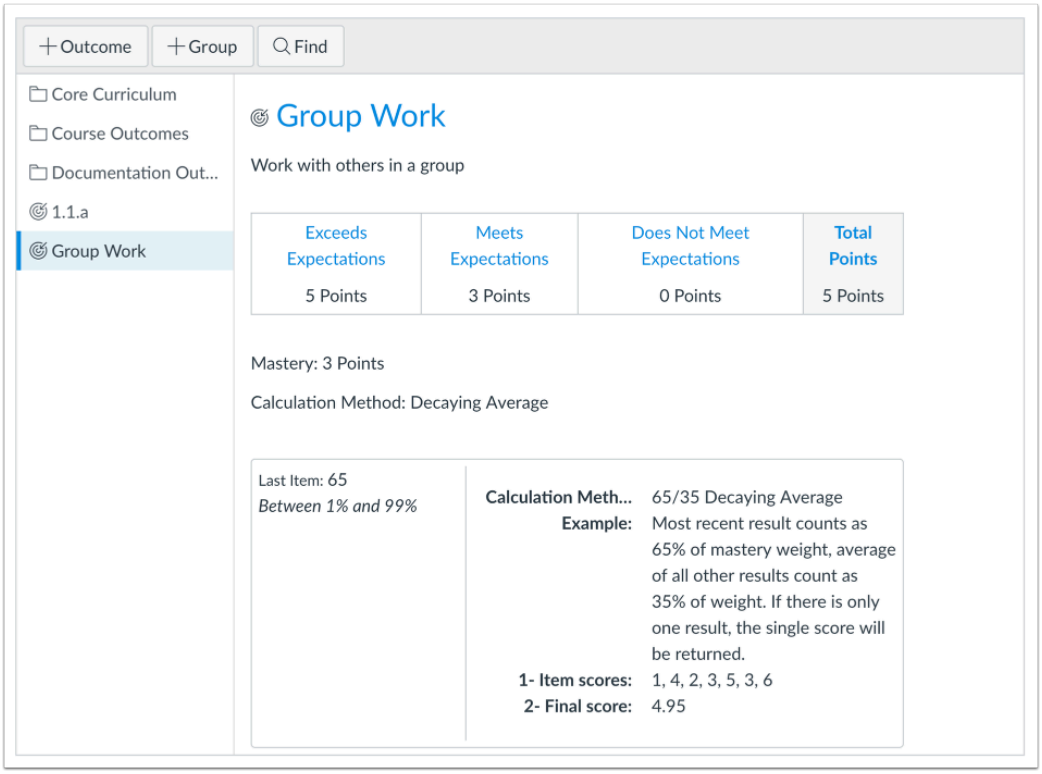
Set the mastery point value in the **Mastery at** field [1]. This field indicates the number of points that must be achieved for mastery according to the criterion ratings.

In the **Calculation Method** drop-down menu [2], select the calculation method for the outcome. By default, new outcomes are set to the Weighted Average calculation method in the Canvas interface.

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

Note: If you cannot edit calculation methods for your outcome, your institution has enabled account-wide outcome calculation methods.

View Outcome



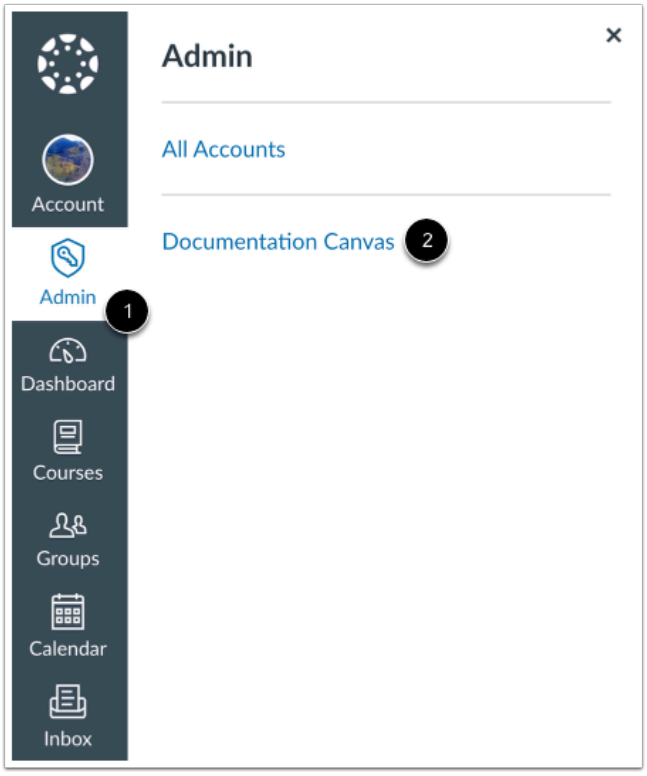
View the created outcome.

How do I create outcome groups for an account?

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

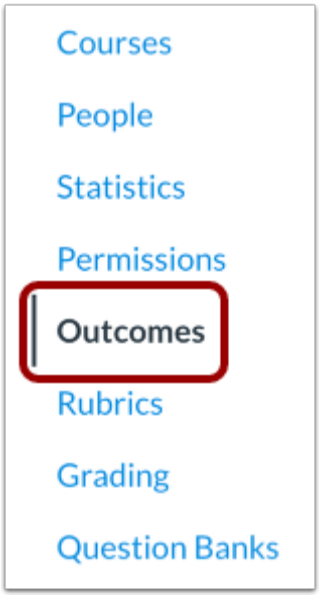
This lesson displays how to create outcome groups in the classic Outcomes page view. If the Outcomes page in your account displays differently than the images in this lesson, learn how to create outcome groups in an account that has enabled the Improved Outcomes Management feature option.

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.

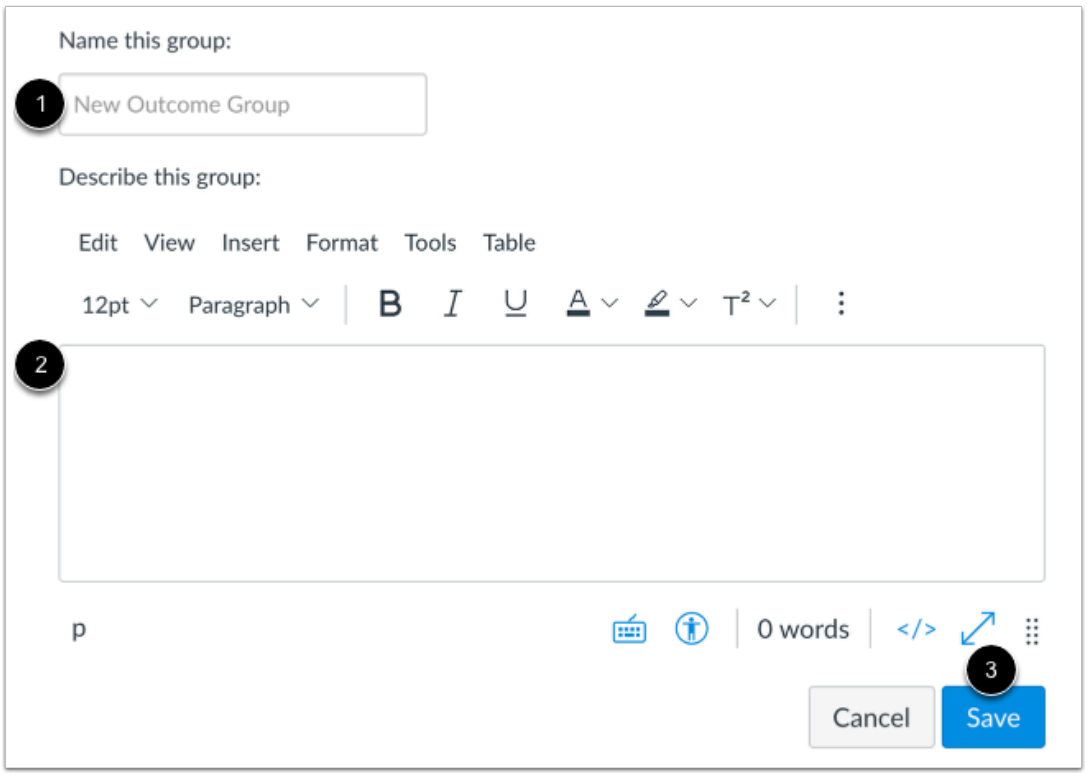
Add Outcome Group



Click the **New Group** button.

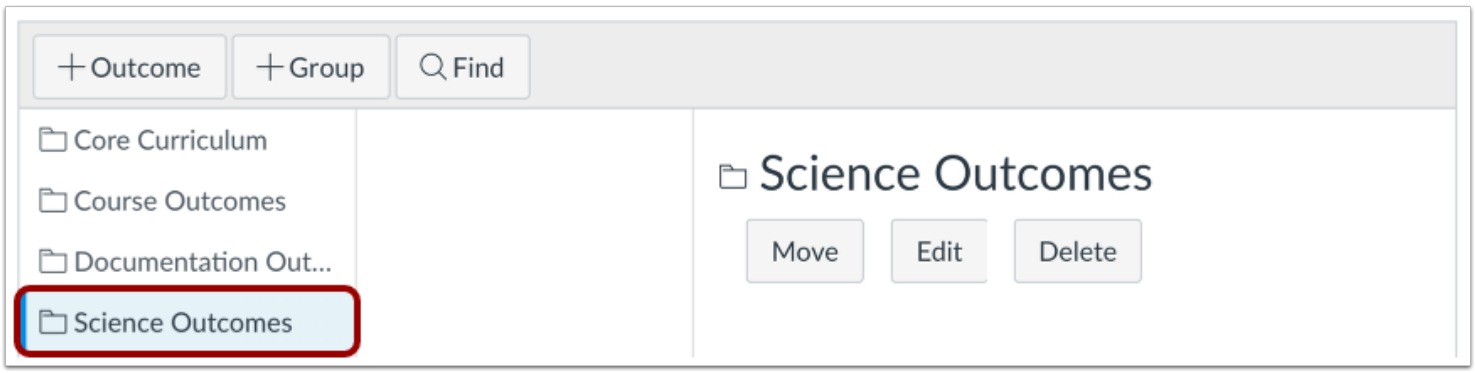
Note: If the New Outcome button does not display, your institution may be using Improved Outcomes Management.

Create Outcome Group



Type a Learning Outcome group name in the **Name this group** field [1]. Type a description in the Rich Content Editor [2]. Click the **Save** button [3].

View Outcome Group



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

How do I import outcomes for an account?

You can bulk import outcomes for your account using a CSV file. A bulk import allows you to add new outcomes to your account or update the details of multiple outcomes at one time.

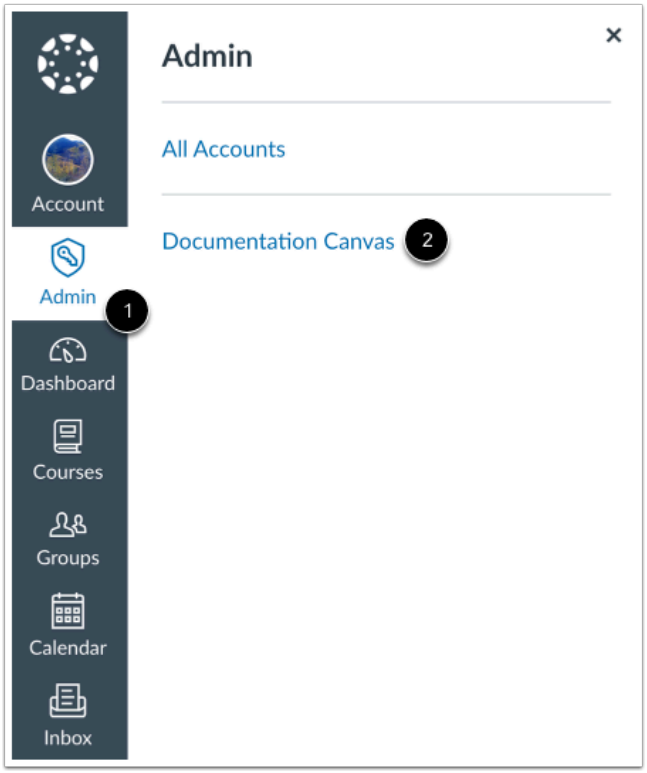
The CSV file must be formatted correctly according to the Outcomes Import Format Documentation. If you don't want to create a new CSV file, you can download the Outcomes Export report from Canvas, change it, and re-upload the same file.

After your CSV file has been processed, you will receive an email notification confirming a successful import or displaying errors with your file. If there were errors, the email will contain details about the first 100 errors including the row of the error and a short description.

Notes:

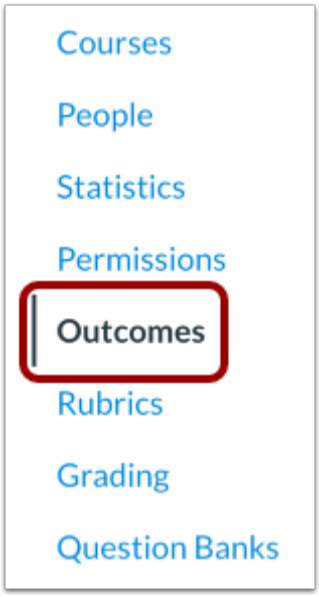
- Outcomes import supports CSV or JSON files.
- Importing outcomes is an account permission. If you do not have permission to import outcomes, your institution has restricted this feature.
- In new outcomes, the vendor_guid field must not contain a colon.
- Depending on your institution's preference, your Outcomes page may not match the images shown in this lesson. However, functionality of the page remains the same.

Open Account



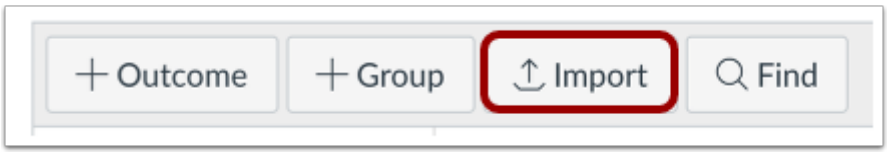
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



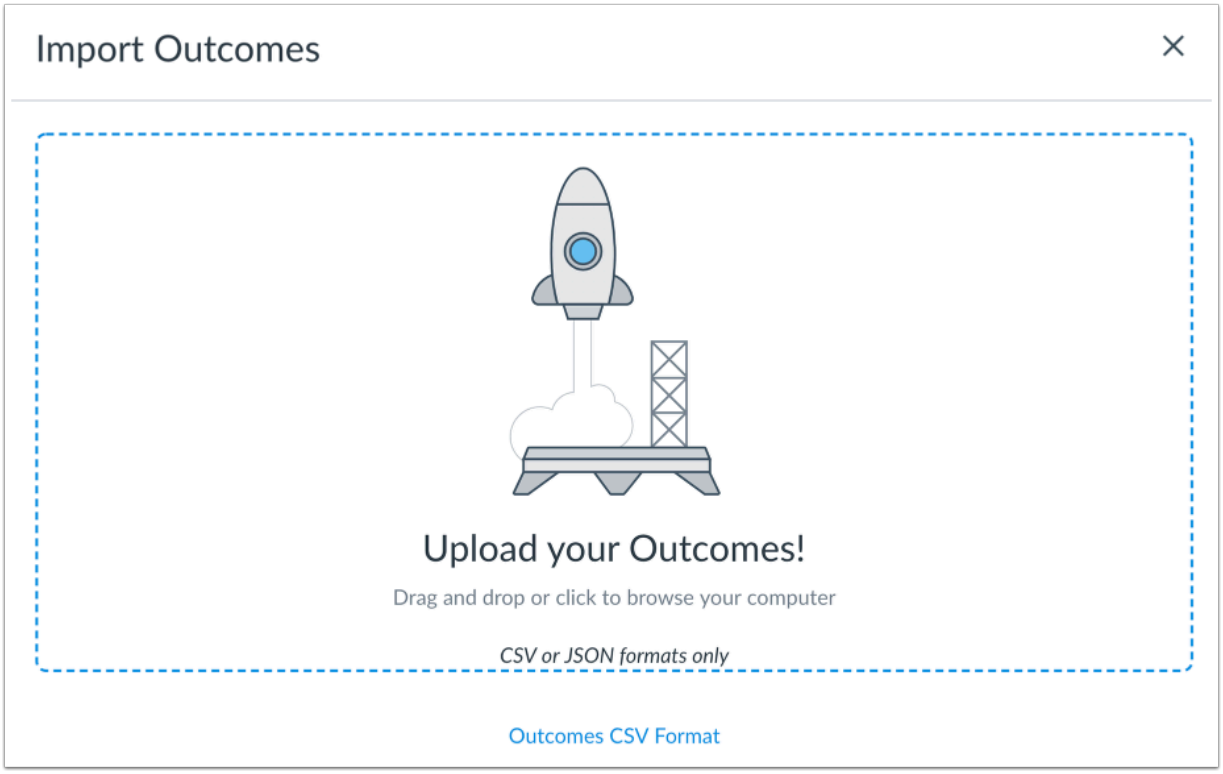
In Account Navigation, click the **Outcomes** link.

Import Outcomes



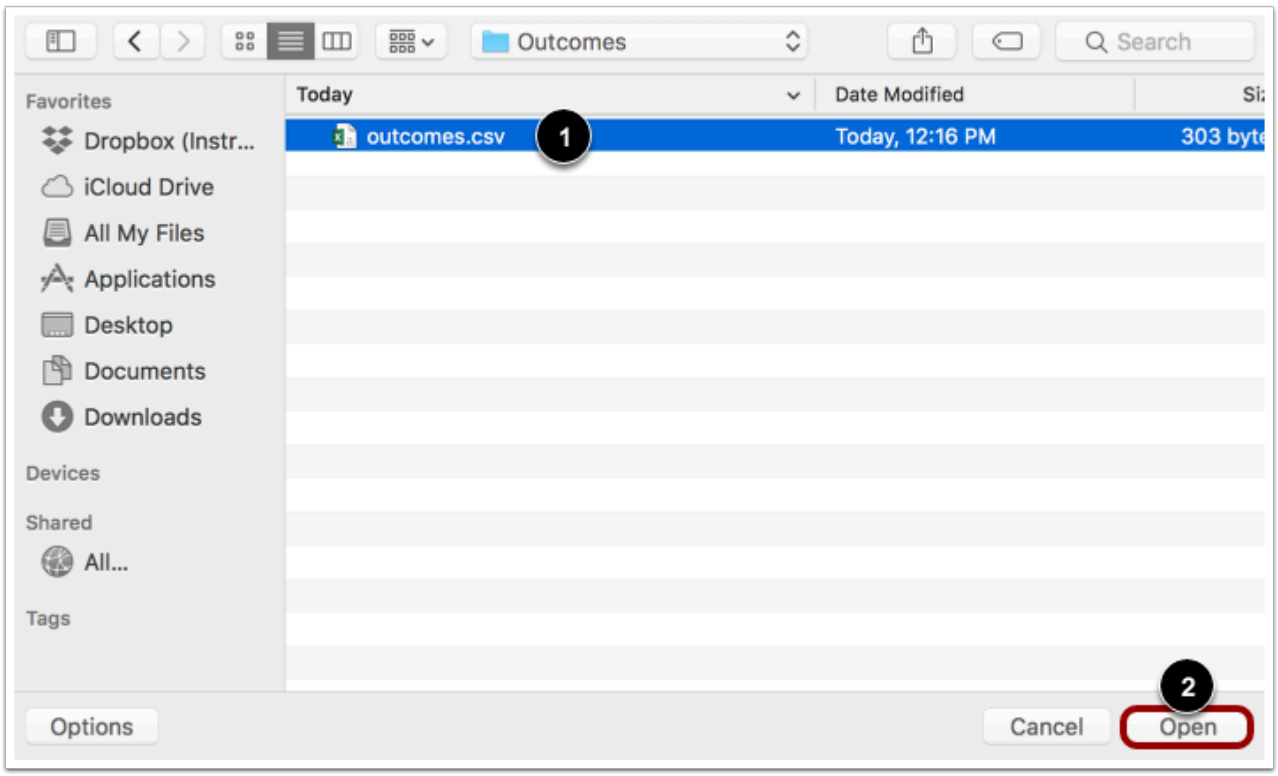
Click the **Import** button.

Upload File



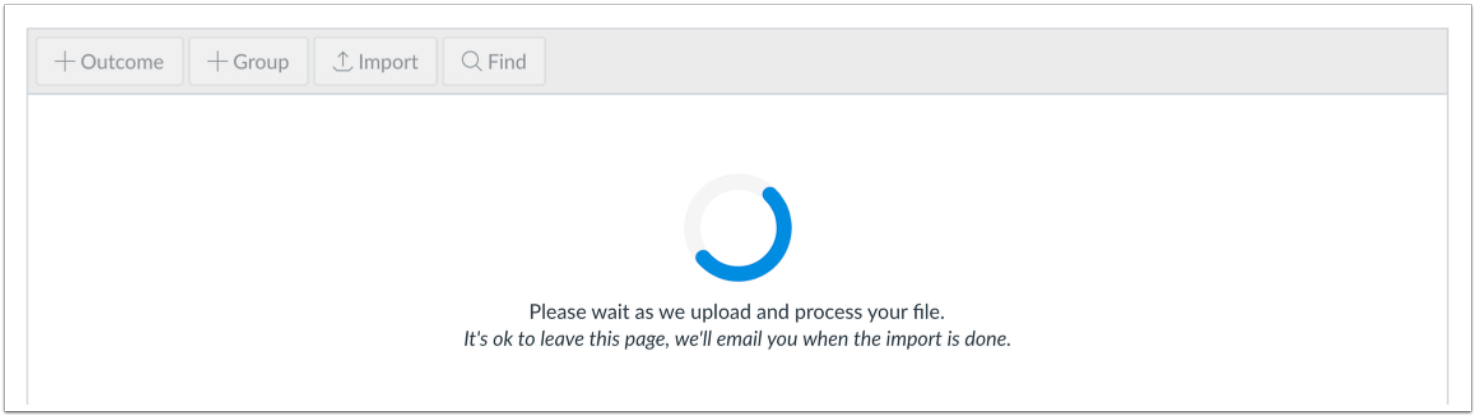
Drag and drop your CSV file to the upload area, or click in the upload area to choose a file from your computer.

Open File



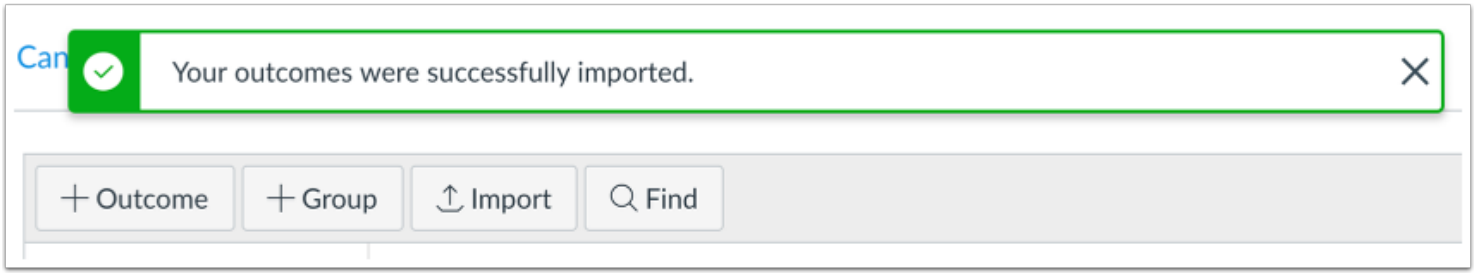
Locate the CSV file [1] and then click the **Open** button [2].

View Import Status



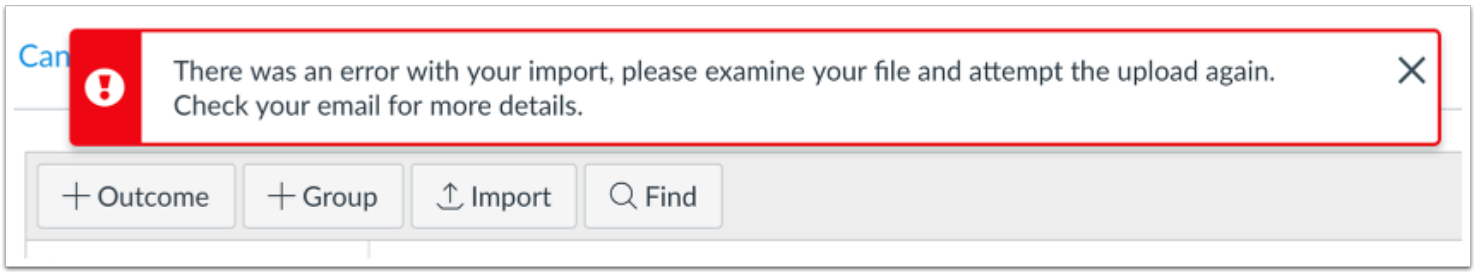
Canvas displays a loading page while the file uploads. Large CSV files may take time to import. You can leave the Outcomes page at any time without disrupting the import process.

View Import Success



When the file has been successfully imported, Canvas displays a confirmation message. You will also receive an email that the import was successful.

View Import Errors and Warnings



If the import was not successful, or if the import altered existing outcomes, Canvas displays an error message.

The error message displays for outcome import errors and for outcome import warnings.

You will receive an email with details about the first 100 errors and warnings. Each error or warning will include the CSV row number and a description of the error or warning.

Import errors stop the import process entirely and need to be fixed before outcomes can be imported successfully. The following types of errors may occur in CSV files:

- Required headings are missing
- Other headings are placed after the ratings header
- Invalid headers are present
- Required fields are missing
- Import file contains no data

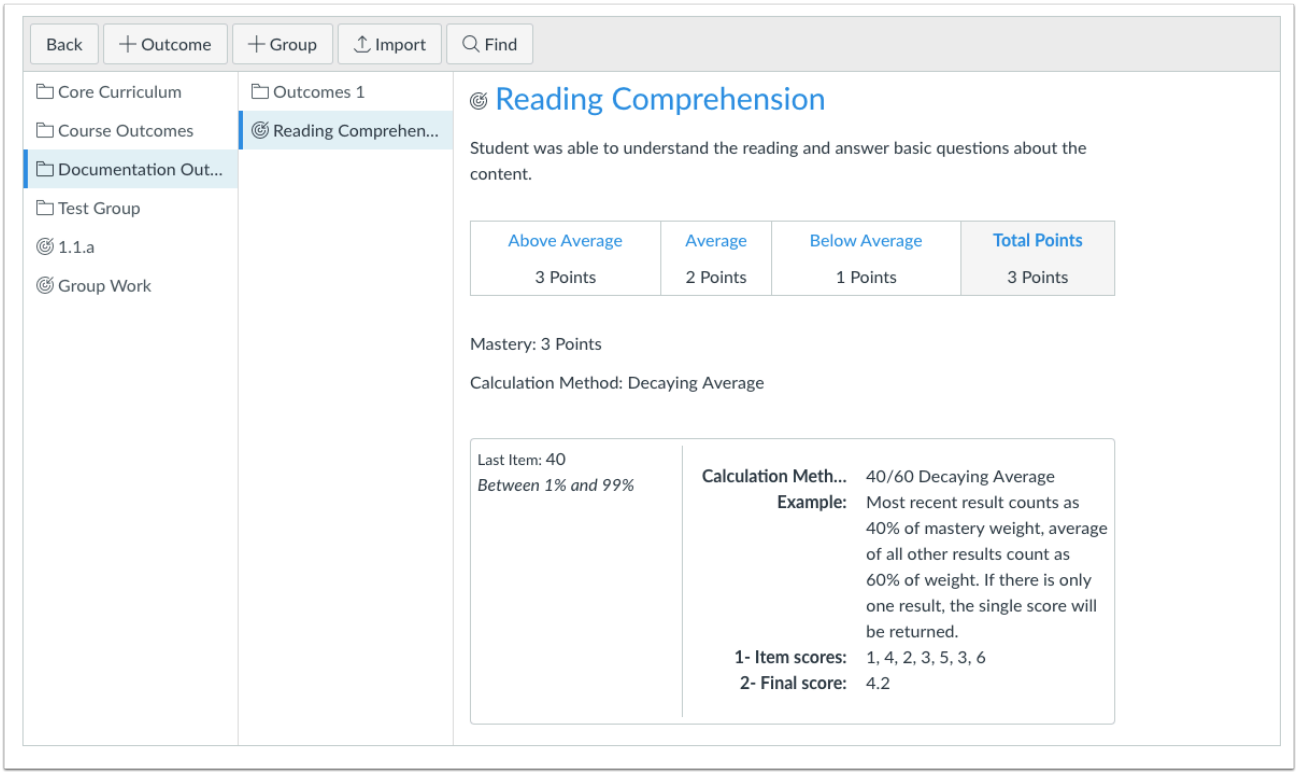
- Invalid UTF-8 string

When an import warning occurs, Canvas skips the affected row and the import moves on. The following types of warnings may occur in CSV files:

- Rating tiers have missing points
- Rating tiers have invalid point values
- Rating tiers have points in wrong order
- Object type is incorrect
- Parent group refers to missing outcomes
- Parent groups are invalid
- Workflow state is invalid
- Calculation validation method not specified
- Group receives invalid fields
- Outcome edits are not within the same context

Correct the errors in the CSV file according to the Outcomes Import Format Documentation and re-import the file.

View Outcomes



View the outcomes imported into your account.

How do I edit or delete an outcome in an account?

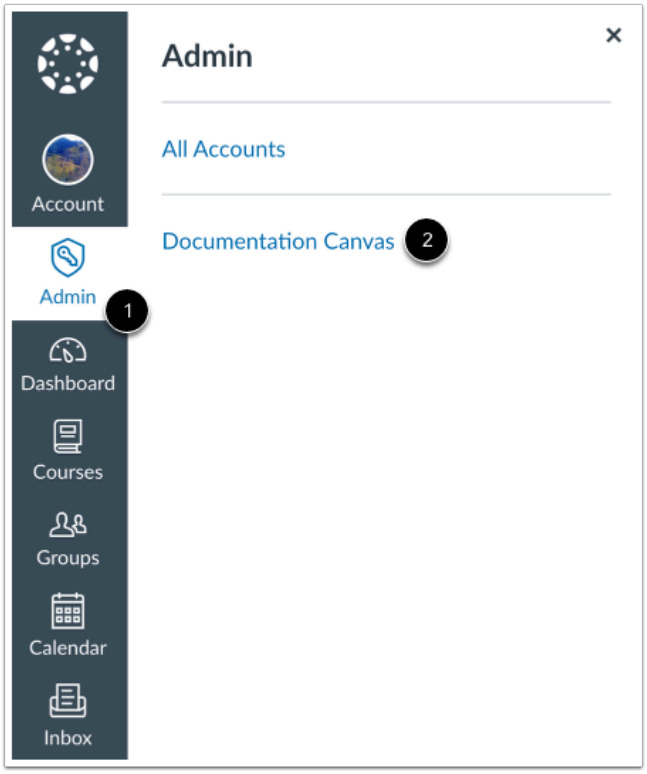
You can edit or delete outcomes in your account. Outcomes can be modified if they have been used to assess students, but any changes may affect student results.

This article displays how to edit or delete an outcome in the classic Outcomes page view. If the Outcomes page in your account displays differently than the images in this article, learn how to edit or remove an outcome in an account that has enabled the Improved Outcomes Management feature option.

Notes:

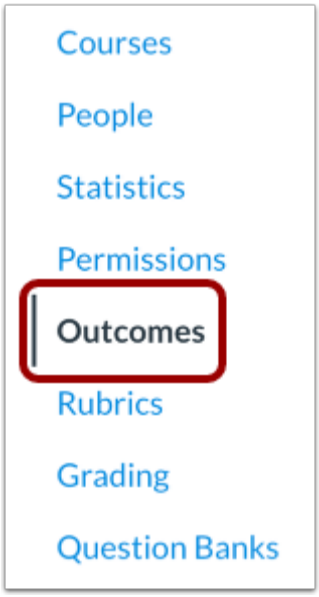
- You can modify any outcomes where you have permission.
- Outcomes that have been aligned with an assignment or question bank cannot be deleted unless they are removed from the assignment or question bank. Outcomes that have been used to assess a student cannot be deleted.
- If you cannot edit mastery scales and calculation methods for an outcome, your institution has enabled account-wide mastery scales and calculation methods.

Open Account



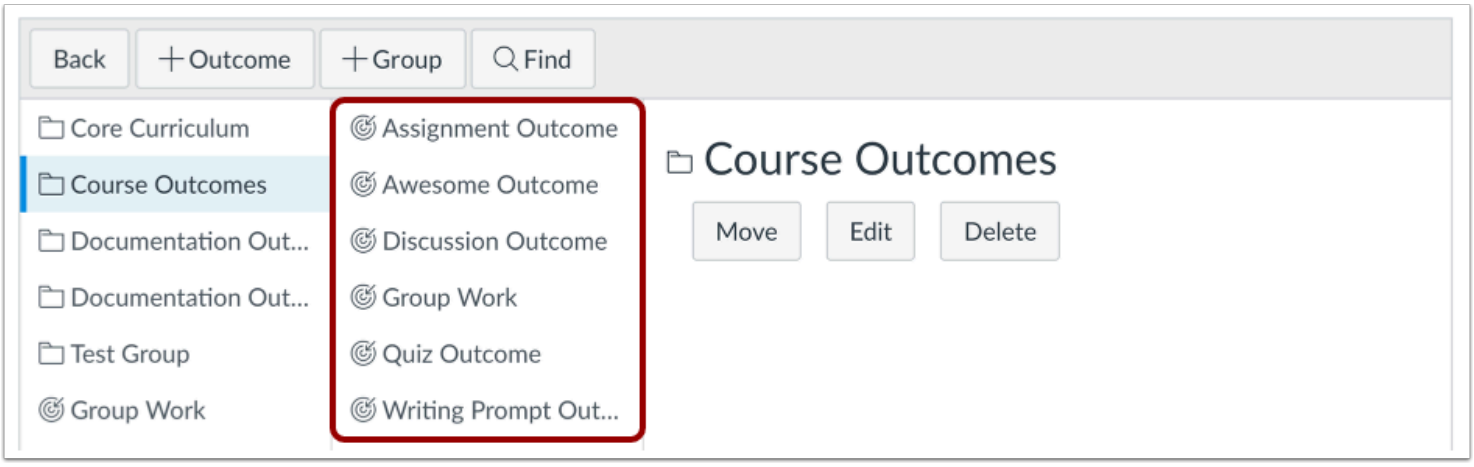
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



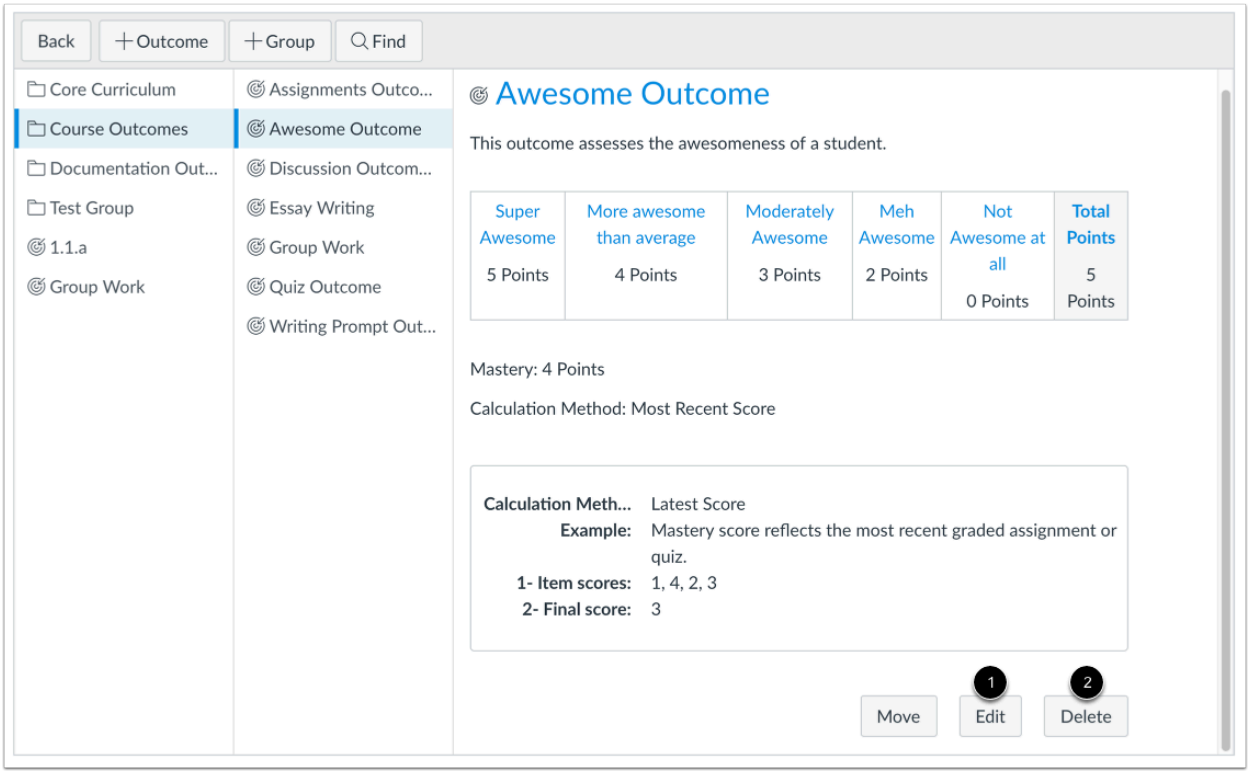
In Account or Sub-Account Navigation, click the **Outcomes** link.

Select Outcome



Locate the outcome you want to modify.

Modify Outcome

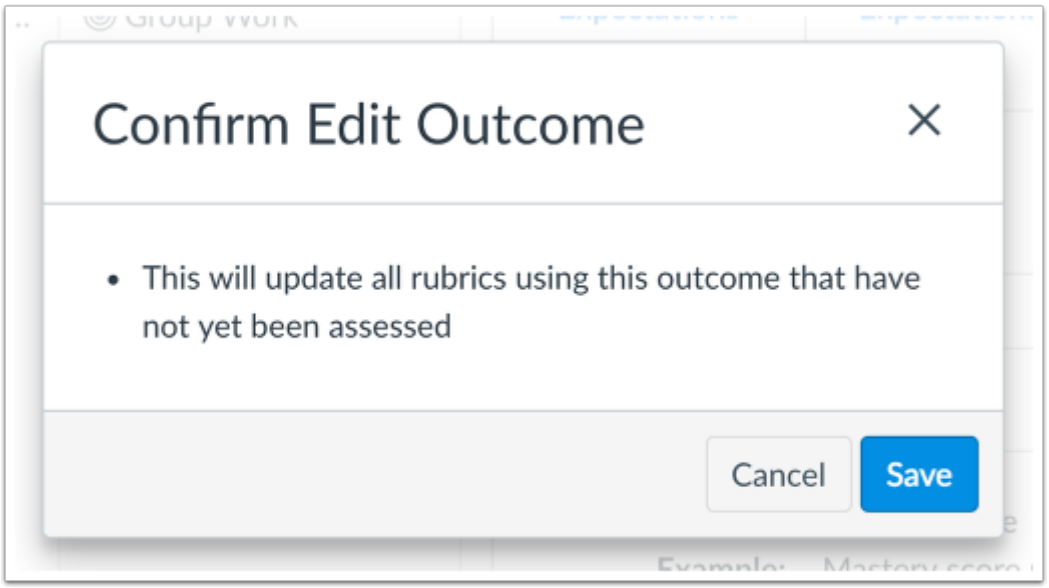


To edit an outcome, click the **Edit** button [1]. Editing an outcome lets you change the outcome name, description, calculation method, and other elements as set when creating an account outcome.

When you are finished with your edits, click the **Save** button.

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

View Outcome Edit Confirmation

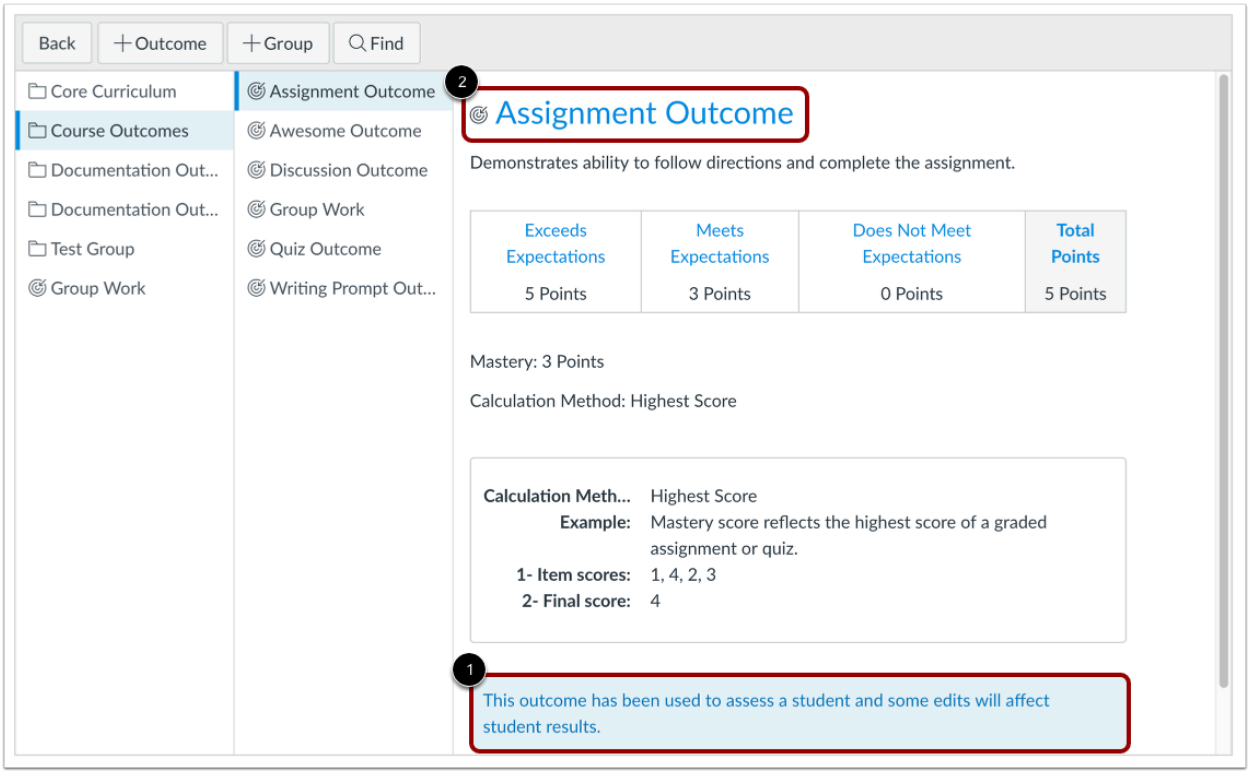


If you edit an outcome that has been used to assess a student, Canvas displays a message notifying you that your edits will update all outcomes associated with a rubric that has not been assessed.

Click the **Save** button.

Note: This message only displays for outcomes you modify that have not been used to assess a student. If this confirmation message does not display, the outcome is associated with more than one rubric and edits cannot be updated.

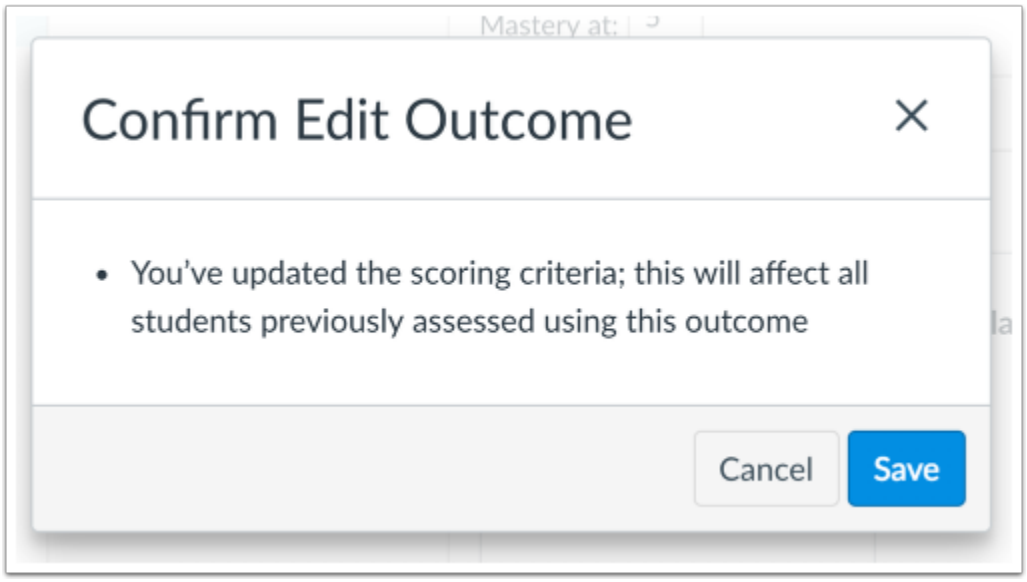
View Assessed Outcome



If an outcome has already been used to assess a student, some modifications may affect student results [1].

To view any aligned items and student assessments for a particular outcome, click the name of the outcome [2]. These assignments and rubrics may be affected when you edit the outcome.

View Scoring Edits Confirmation



If you are editing scoring details on an outcome that has been used to assess students, Canvas displays a message notifying you that your edits will affect all students previously assessed using the outcome. Scoring changes only affect a student's learning mastery score in the Learning Mastery Gradebook for the edited outcome. When scoring criteria is edited, the learning mastery values scale for assessed rubrics according to the original points possible.

Click the **Save** button.

How do I edit or delete an outcome group in an account?

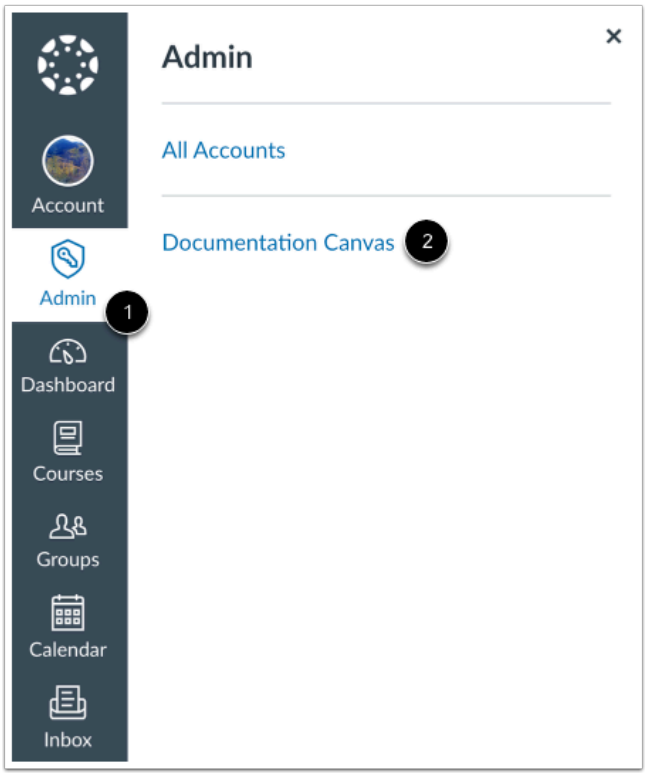
If you created an outcome group in your account that you need to edit or delete, you can do so as long as the outcomes in the group have not yet been used to assess a student. Once an outcome in the group has been used for scoring, you cannot delete the outcome group. You can still modify the details of the outcome group.

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

This article displays how to edit or delete an outcome group in the classic Outcomes page view. If the Outcomes page in your account displays differently than the images in this article, learn how to edit or remove an outcome group in an account that has enabled the Improved Outcomes Management feature option.

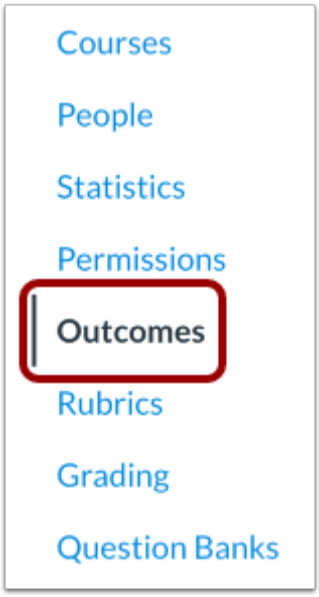
Note: You can modify any outcomes or outcome groups where you have permission.

Open Account



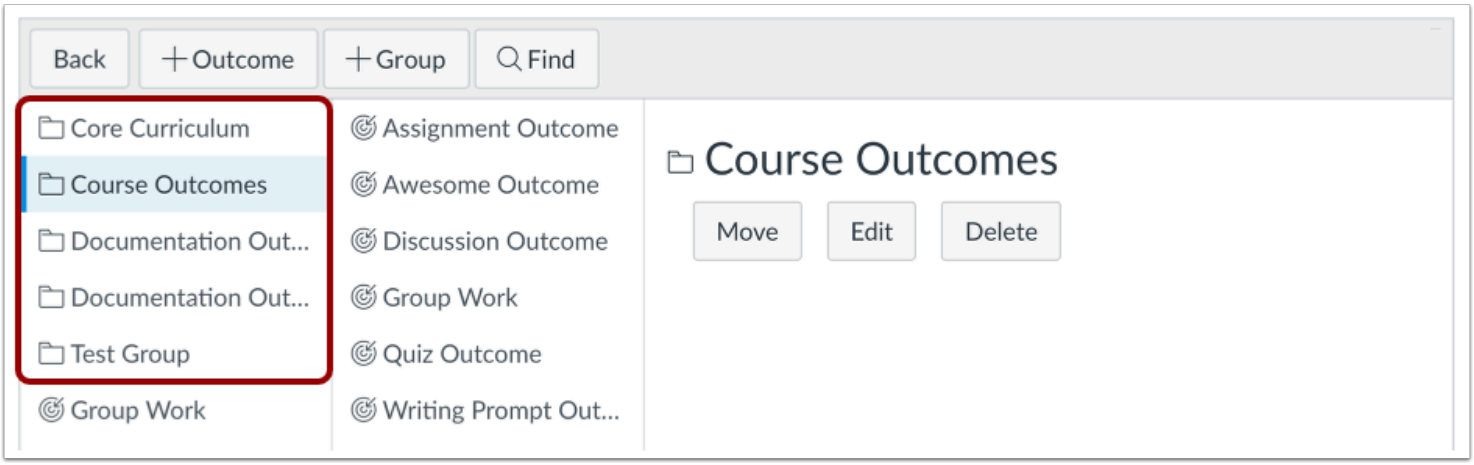
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



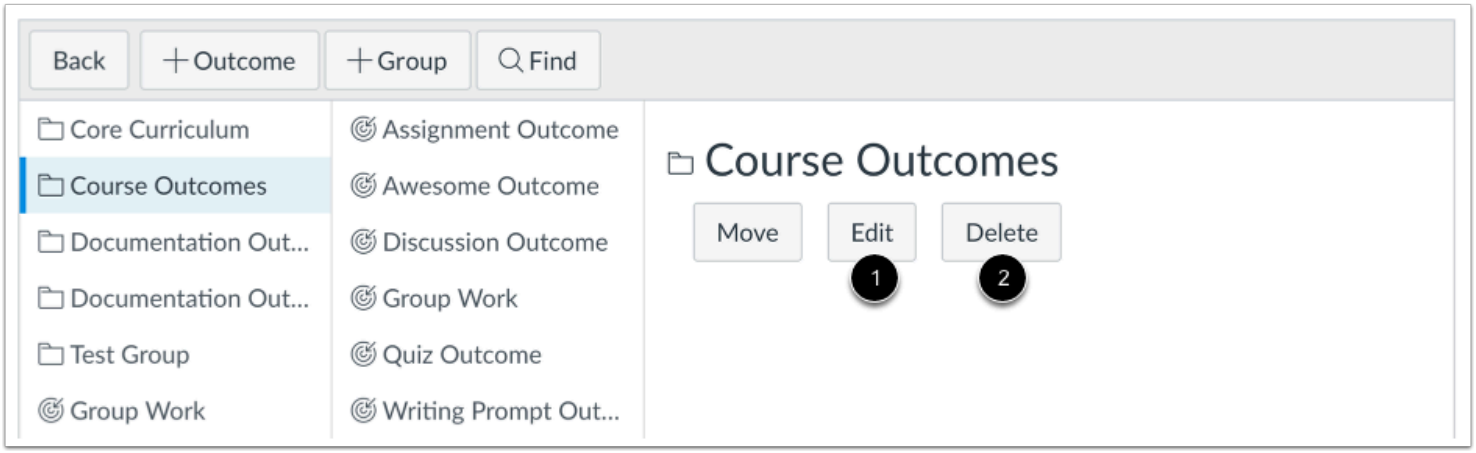
In Account or Sub-Account Navigation, click the **Outcomes** link.

Select Outcome Group



Locate the outcome group you want to modify.

Modify Outcome Group



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

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

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

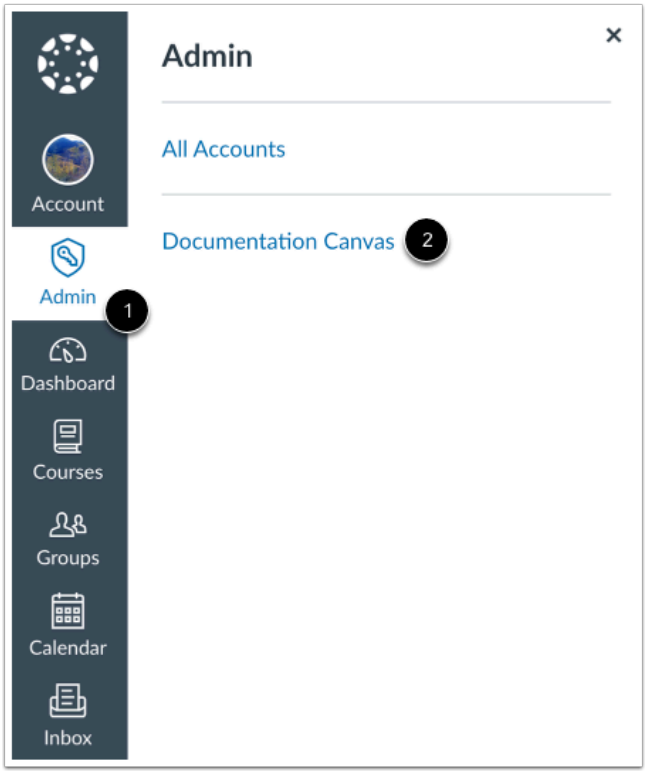
How do I create custom account outcome names for students?

As an admin, you can choose to allow the Student Learning Mastery Gradebook feature option for instructors to enable in their courses, which lets students see Learning Mastery scores on their Grades page. All Outcomes in the course appear in the student view. However, some official outcome names may be difficult for students to understand, so when creating outcomes at the account level, you have the option to create a custom, or more friendly name, to appear for students. This separate name field allows you to keep both the official name of the outcome as well as create a friendlier version that is more helpful for students.

This article displays how to create custom account outcome names in the classic Outcomes page view. If the Outcomes page in your account displays differently than the images in this article, learn how to create outcomes in an account that has enabled the Improved Outcomes Management feature option.

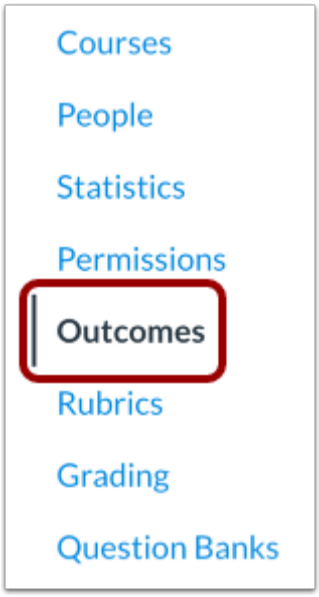
Note: For instructors, creating a custom name is a course permission. If they have access, instructors can create friendly names for outcomes they create at the course level. However, they cannot create custom names for outcomes created at the account level.

Open Account



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

Open Outcomes



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

Create New Outcome



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

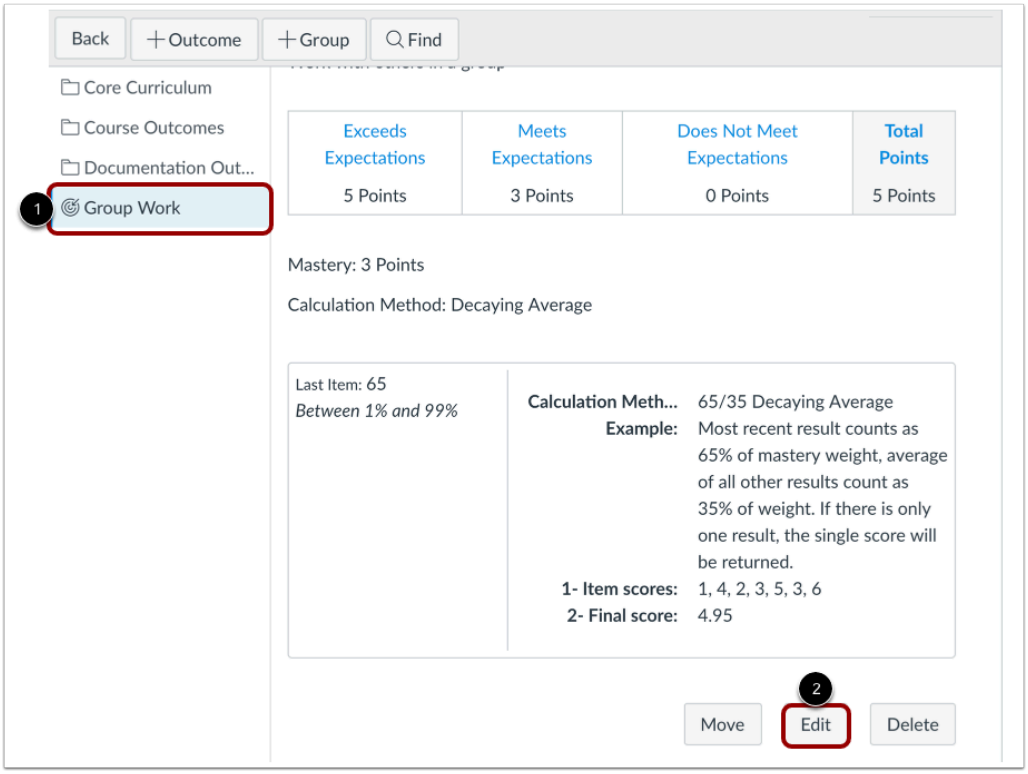
Create Friendly Name



Enter a name for the outcome in the **Name this outcome** field [1]. This is the name of the outcome that will also appear for instructors in their Learning Mastery Gradebook.

To create a custom outcome name for students, enter a name in the **Friendly name (optional)** field [2].

Edit Outcome



If you want to edit an existing outcome and add a friendly name, locate and click the name of the outcome [1]. Click the **Edit Outcome** button [2].

You can only edit outcomes that have not yet been used to assess a student. If the Edit Outcome button is grayed out, you cannot edit the outcome.

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

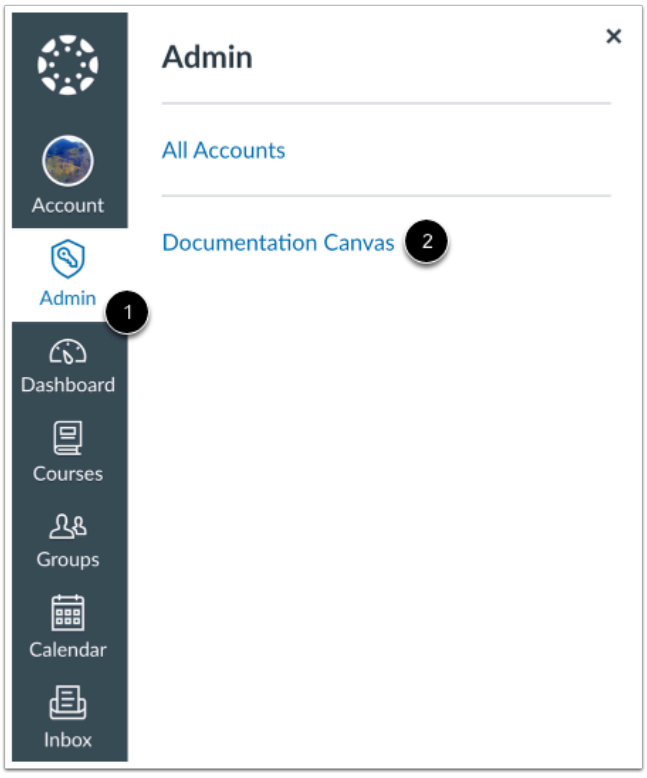
How do I move outcomes and outcome groups in an account?

You can move outcomes and outcome groups after you have added them to your account or sub-account. You can use the Move Outcome or Move Outcome Group button, or you can manually drag and drop the outcome or outcome group.

This article displays how to move outcomes and outcome groups in the classic Outcomes page view. If the Outcomes page in your account displays differently than the images in this lesson, learn how to move outcomes and outcome groups in an account that has enabled the Improved Outcomes Management feature option.

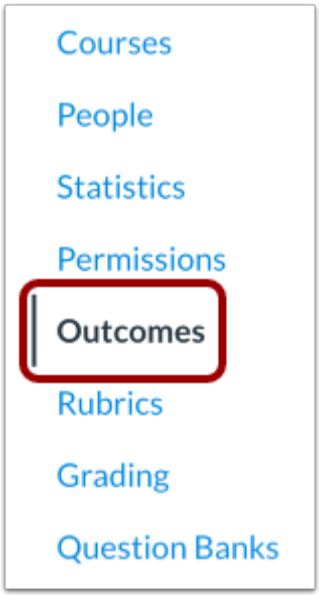
Note: To move an outcome to an outcome group, you will need to create an outcome group.

Open Account



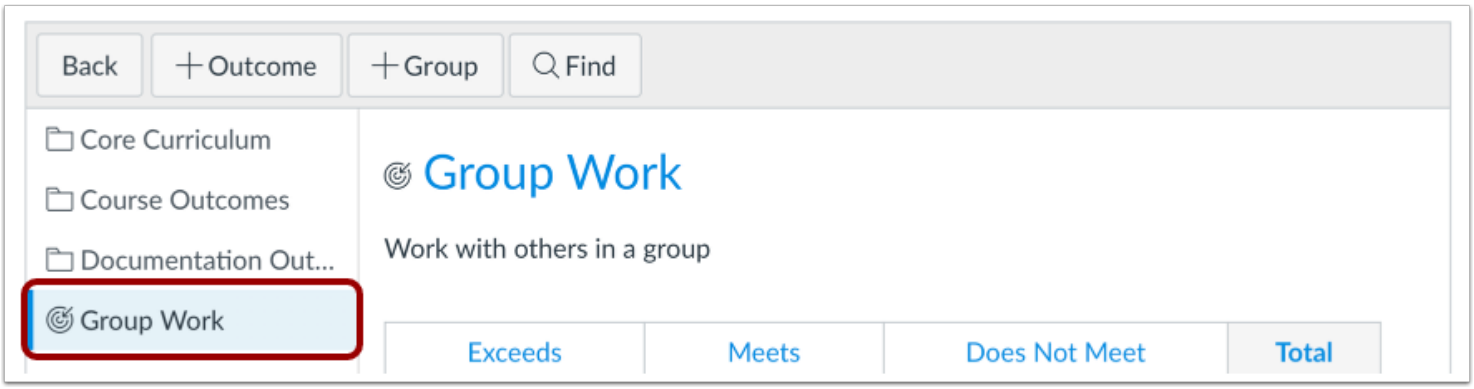
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



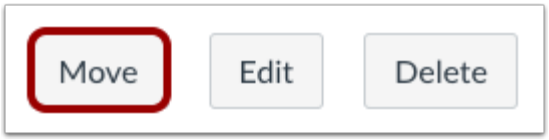
In Account or Sub-Account Navigation, click the **Outcomes** link.

Select Outcome

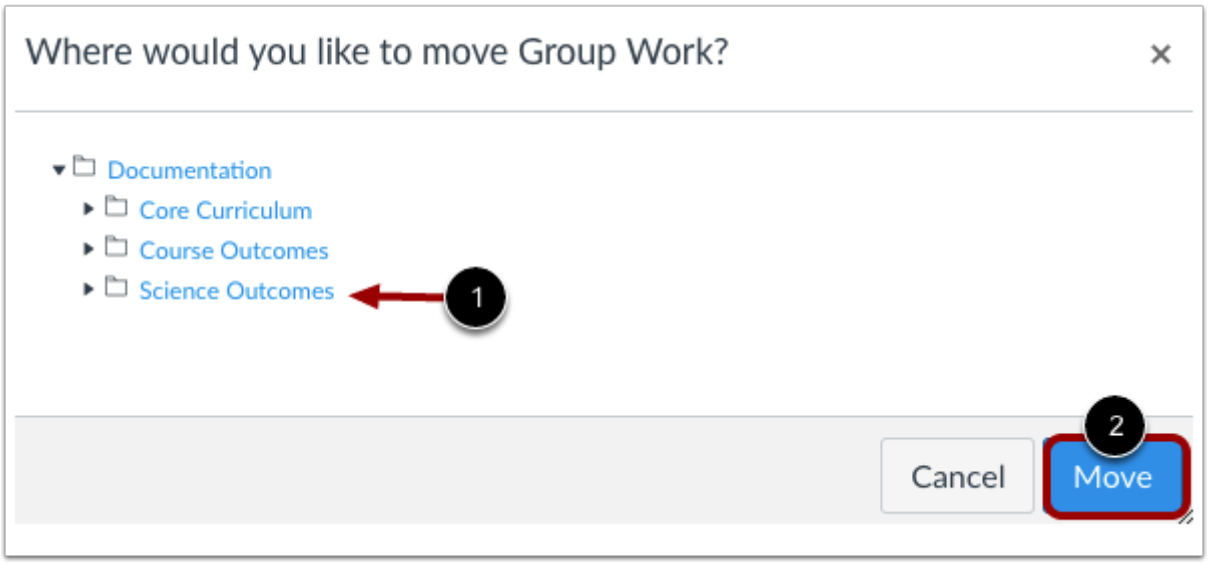


Locate the outcome or outcome group you wish to move.

Move Outcome or Outcome Group



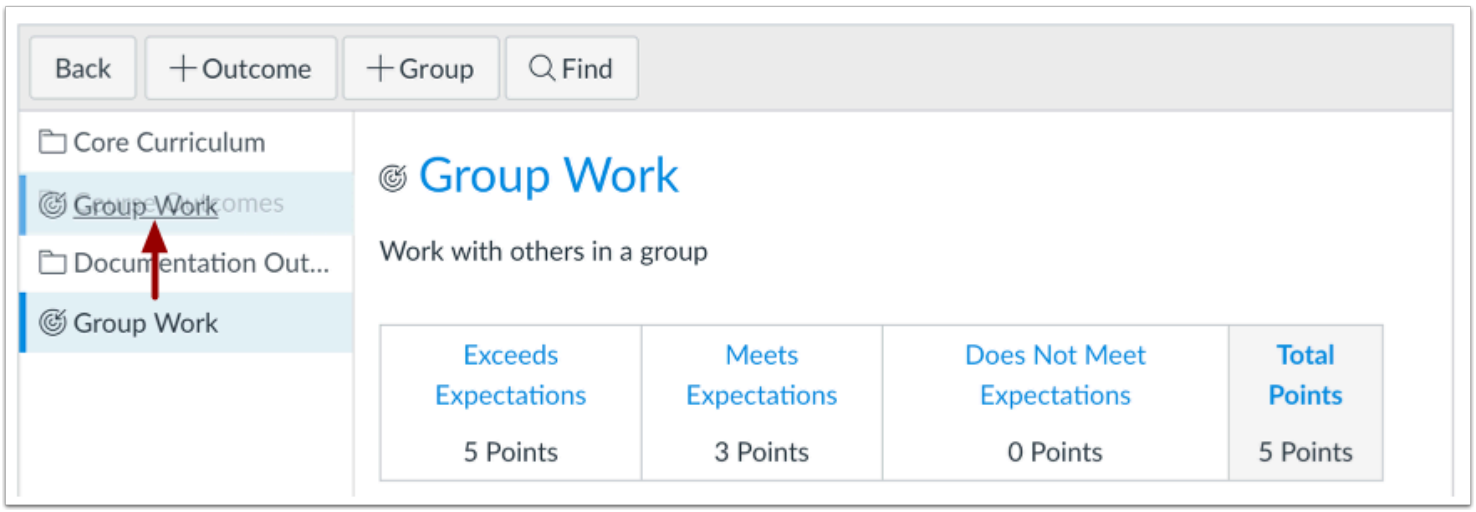
To move an individual outcome or outcome group, click the **Move** button.



Select the outcomes group where you want to move the outcome or outcome group [1].

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

Drag and Drop Outcome or Outcome Group



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

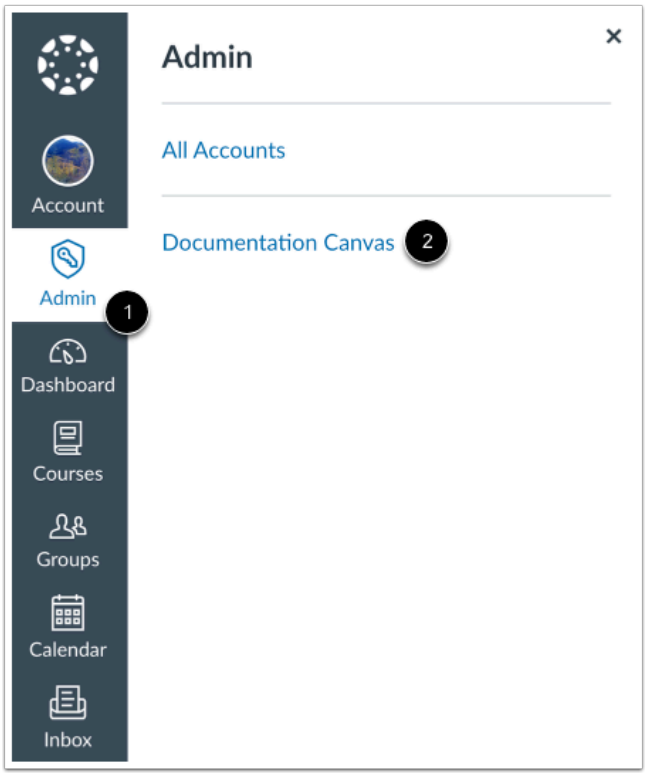
How do I find an existing outcome to add to an account?

All outcomes added at the account or sub-account level will be available to courses within the account. You can find and import Account Standards, which are outcomes that have been created by you or other users with admin permissions for the entire institution. You can also find State and Common Core Standards.

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

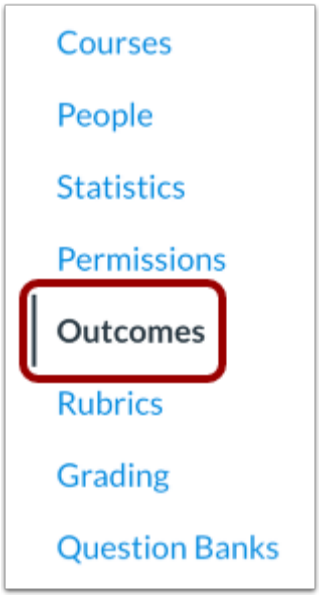
This article displays how to find an existing outcome in the classic Outcomes page view. If the Outcomes page in your account displays differently than the images in this article, learn how to find an existing outcome in an account that has enabled the Improved Outcomes Management feature option.

Open Account



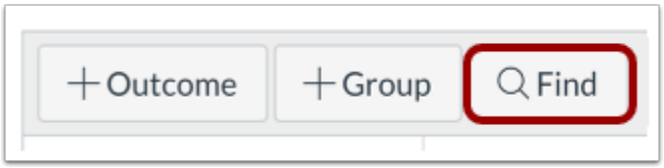
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



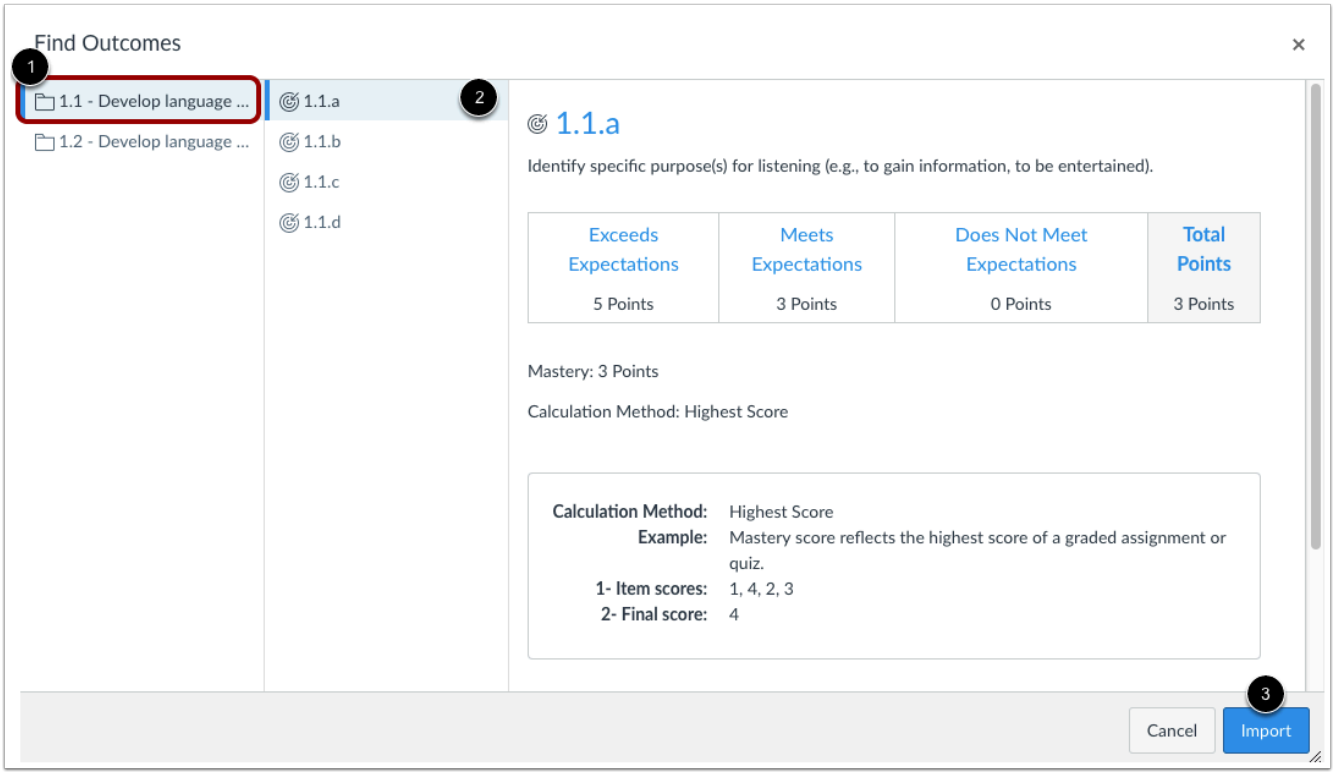
In Account or Sub-Account Navigation, click the **Outcomes** link.

Find Outcome



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

Import Outcome

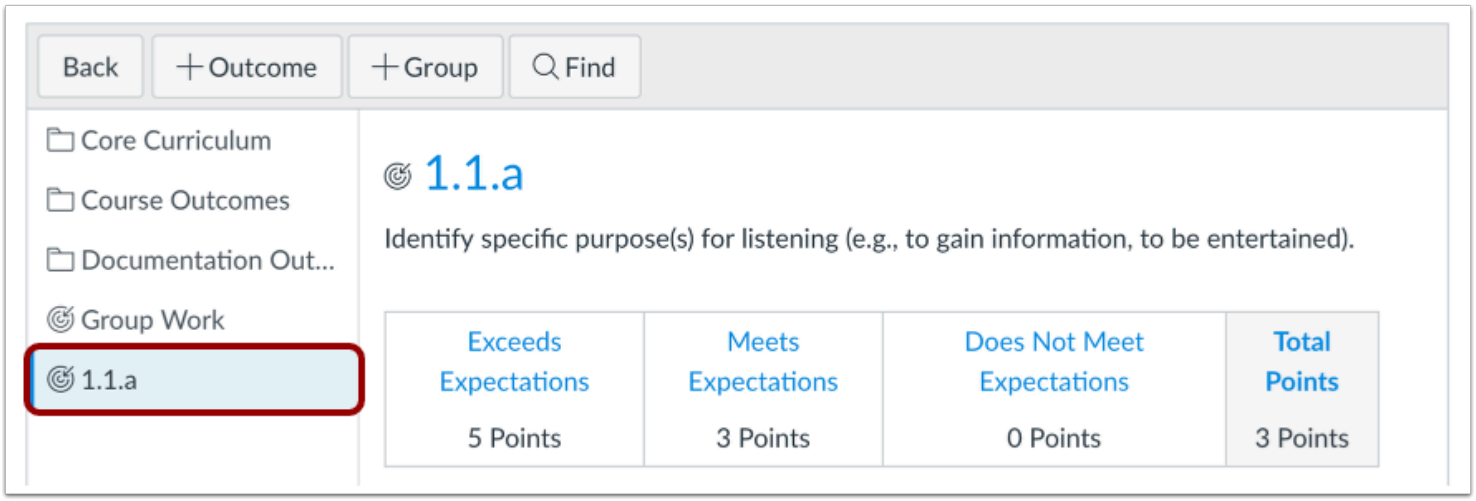


Select the name of an outcome group to view available outcomes [1]. You can also view outcome groups within other outcome groups.

When you have located an outcome, click the name of the outcome you want to import [2]. Click the **Import** button [3].

Note: You can also import an entire outcome group.

View Outcome



View the imported Outcomes.

Outcomes and outcome groups are imported to the main outcome level; learn how to move outcomes or outcome groups.

How do I find Learning Standards to add to an account-level outcome?

Learning Standards are goals and objectives for student assessment in the United States. These standards have been created by the nation's governors and educational leaders to assess specific student learning.

Canvas will import the following standards for free:

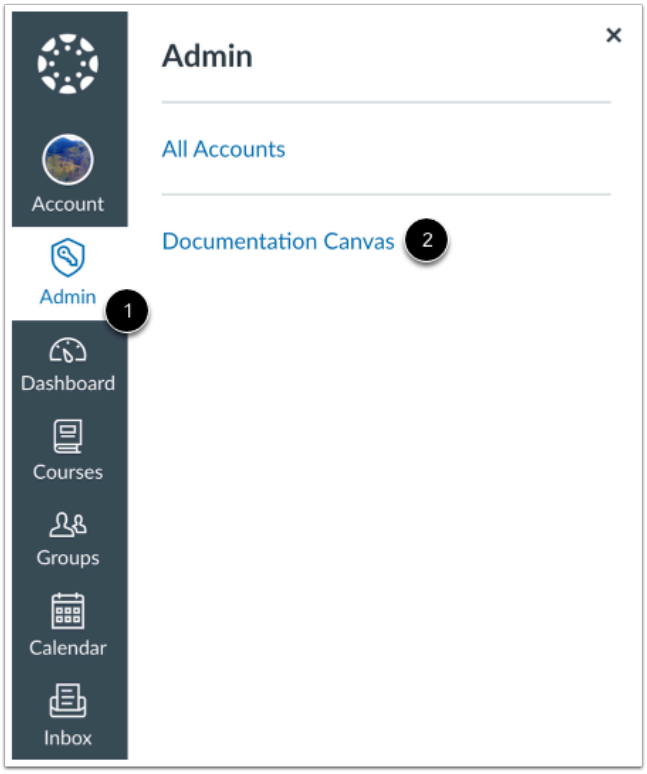
- All Common Core Standards for Language Arts, Math, and Science (NGSS)
- All state specific standards for Core 4 subjects (Language Arts, Math, Science, and Social Studies) for states with current Canvas customers
- All ISTE Standards for Coaches, Computer Science Educators, Students, Teachers, and Administrators

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

If your state does not appear in Outcomes or if your institution does not have access to learning standards, please contact your Customer Success Manager.

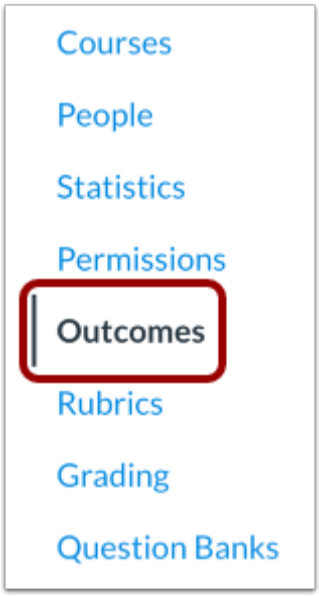
This article displays how to find Learning Standards in the classic Outcomes page view. If the Outcomes page in your account displays differently than the images in this article, learn how to find outcomes in an account that has enabled the Improved Outcomes Management feature option.

Open Account



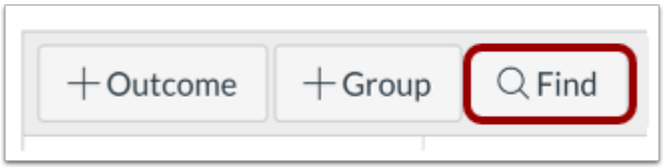
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



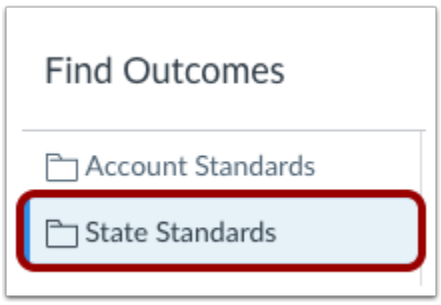
In Account or Sub-Account Navigation, click the **Outcomes** link.

Find Outcome



Click the **Find** button.

Select Outcome Type

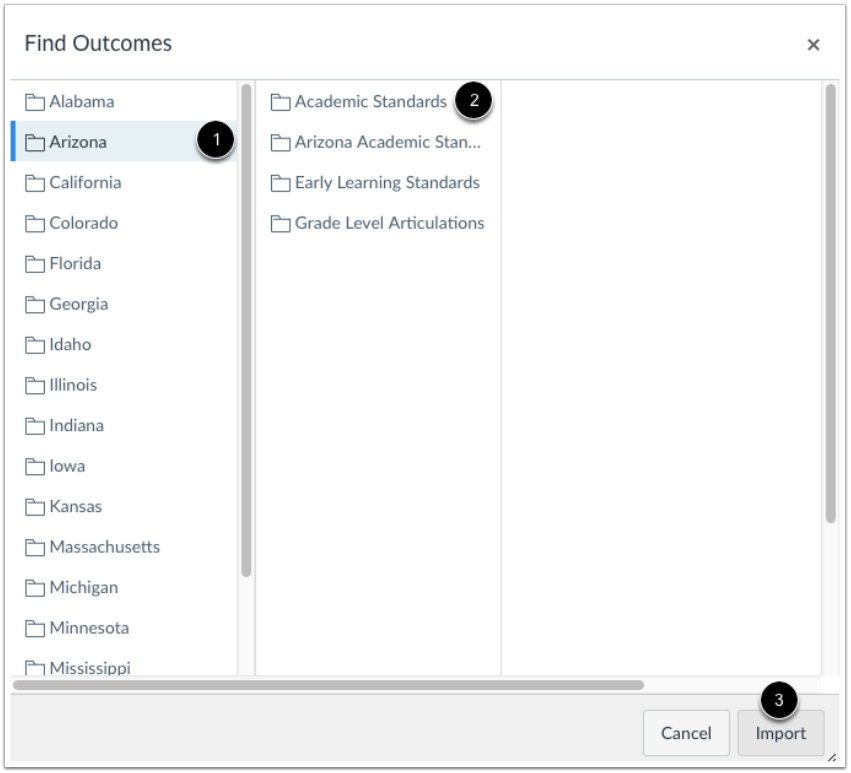


To view state standards, click the State Standards outcome group.

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.

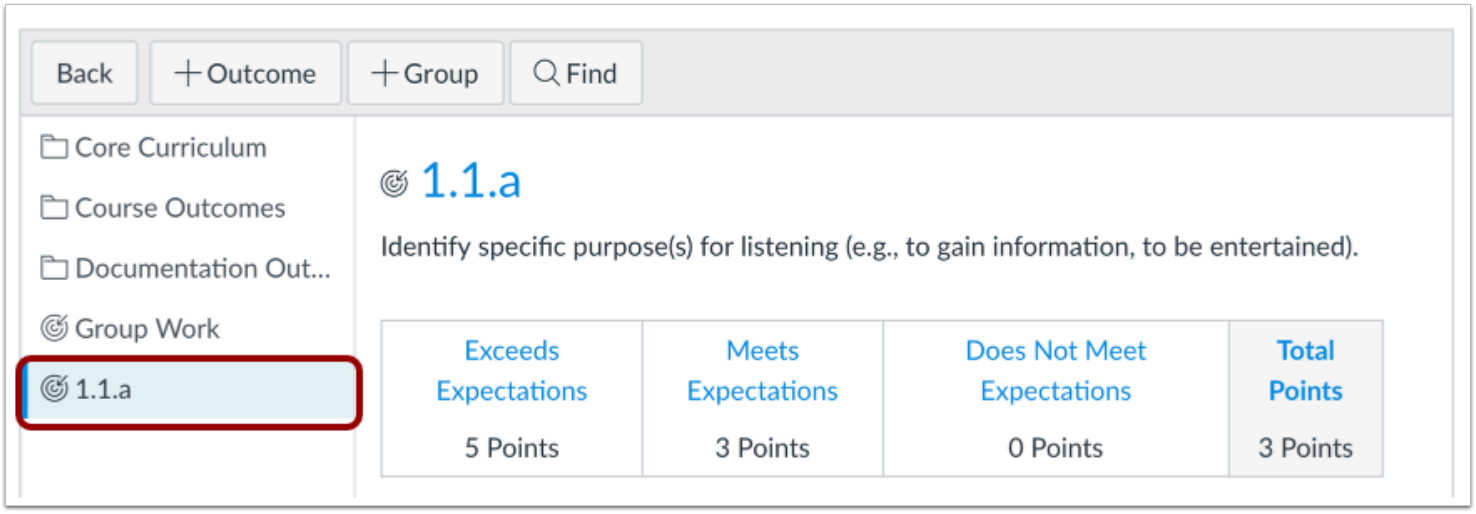
Choose Outcomes



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



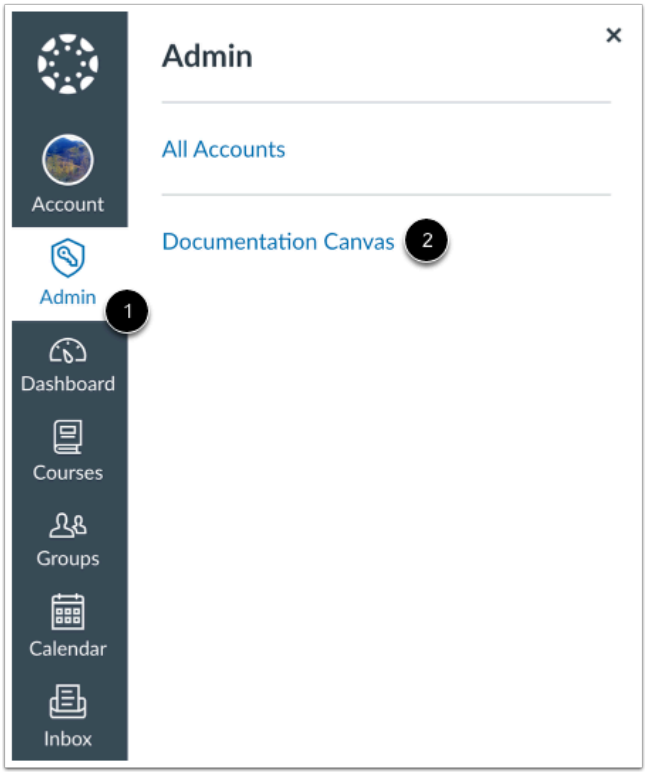
View the added Outcomes.

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 an instructor accessing Outcomes reports in a course or a user with adequate administrative permissions accessing reports in a sub-account.

Open Account



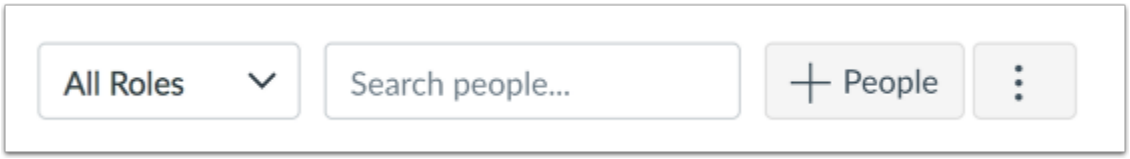
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



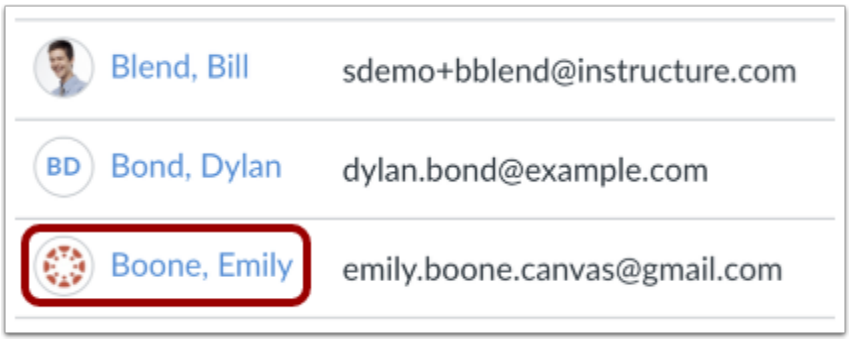
In Account Navigation, click the **People** link.

Find User



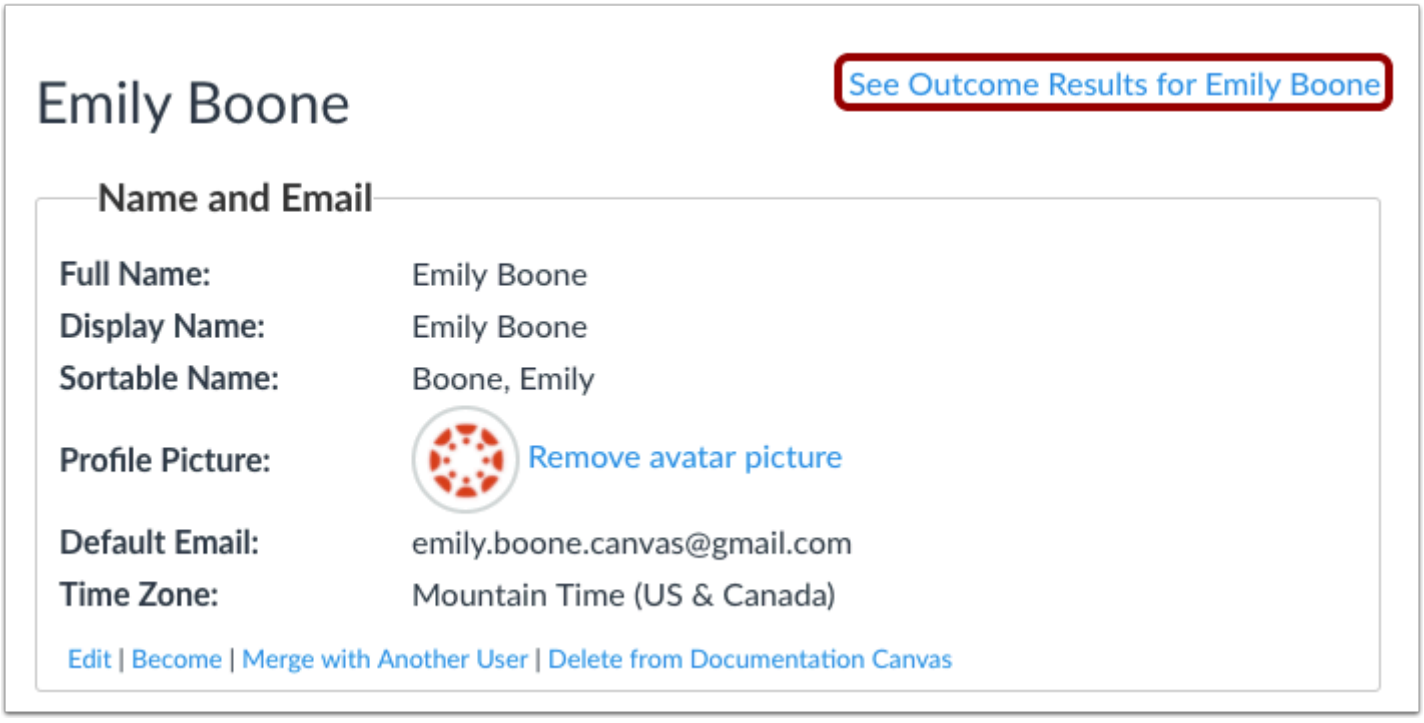
Use the filter and search options to find the user in the account.

Open User Profile



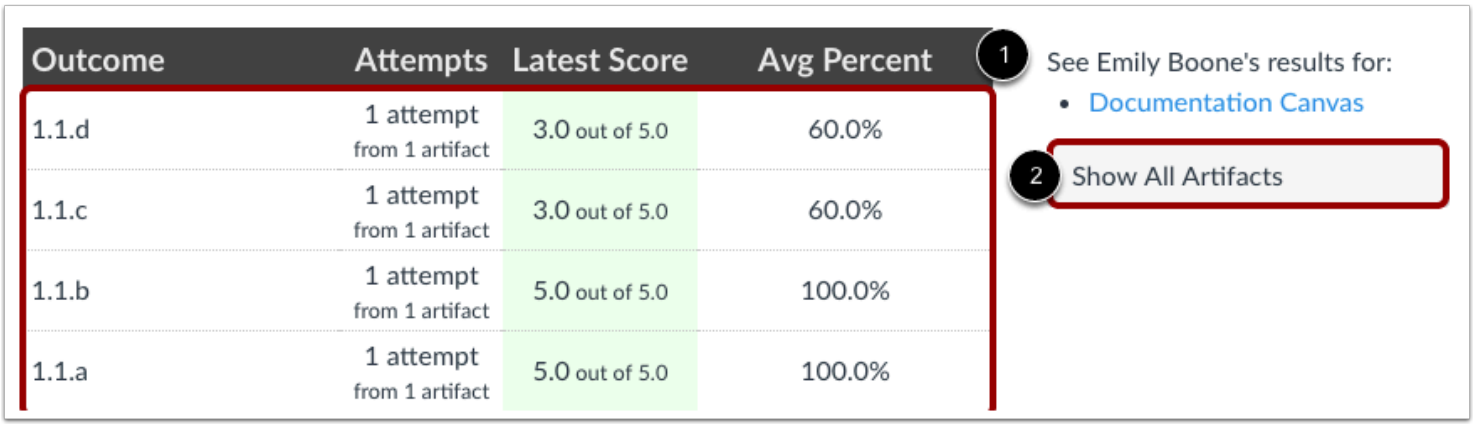
In the search results, click the user's name.

See Outcome Results



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

View Outcome Results



If an instructor has linked assignments or rubrics to Outcomes, the results will show up in this report. The report shows the Outcome, Attempts, Latest Score, and Average Percent [1]. The report will populate once the student turns in assignments or does something related to an Outcome.

If you want to see the artifacts linked to the Outcomes, click the **Show All Artifacts** button [2]. You can also view the student's result for other Outcomes (if any) by clicking the other results option.

Note: Outcome results are tied to level of outcome access. Account outcomes display on the account report, while the sub-account outcomes display on the sub-account report. The only time outcomes would be displayed on both reports is if they are stored in both accounts, such as copying an account outcome to the sub-account level. Outcomes created at the course-level display on the course-level and will not appear on account or sub-account level outcome reports.

How do I manage outcome mastery scales in an account?

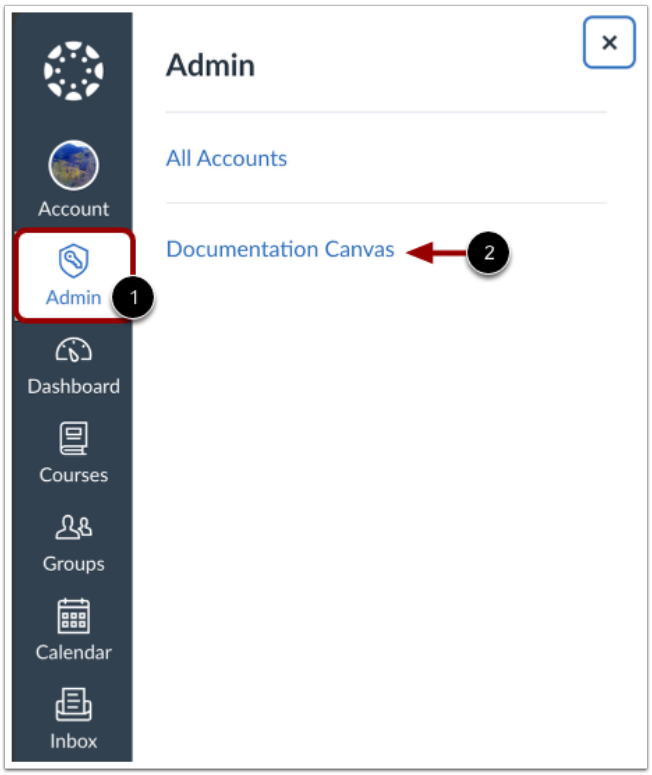
If the Account and Course Level Outcome Mastery Scales feature option is enabled for your account, mastery scales and calculation methods are separated from individual outcomes and the Outcomes page displays Mastery Scales and Calculation Methods tabs.

From the Mastery tab, you can set mastery scales for the entire account.

Notes:

- Enabling the Account and Course Level Outcome Mastery Scales feature option will affect current account data.
- The default criterion mastery ratings display a 0-4 scale.
- If a rubric with aligned outcomes has been used to assess an assignment before Account and Course Level Outcome Mastery Scales are enabled, the assignment is not affected. However, any assignments not previously assessed by the rubric are affected if mastery scores are adjusted.

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.

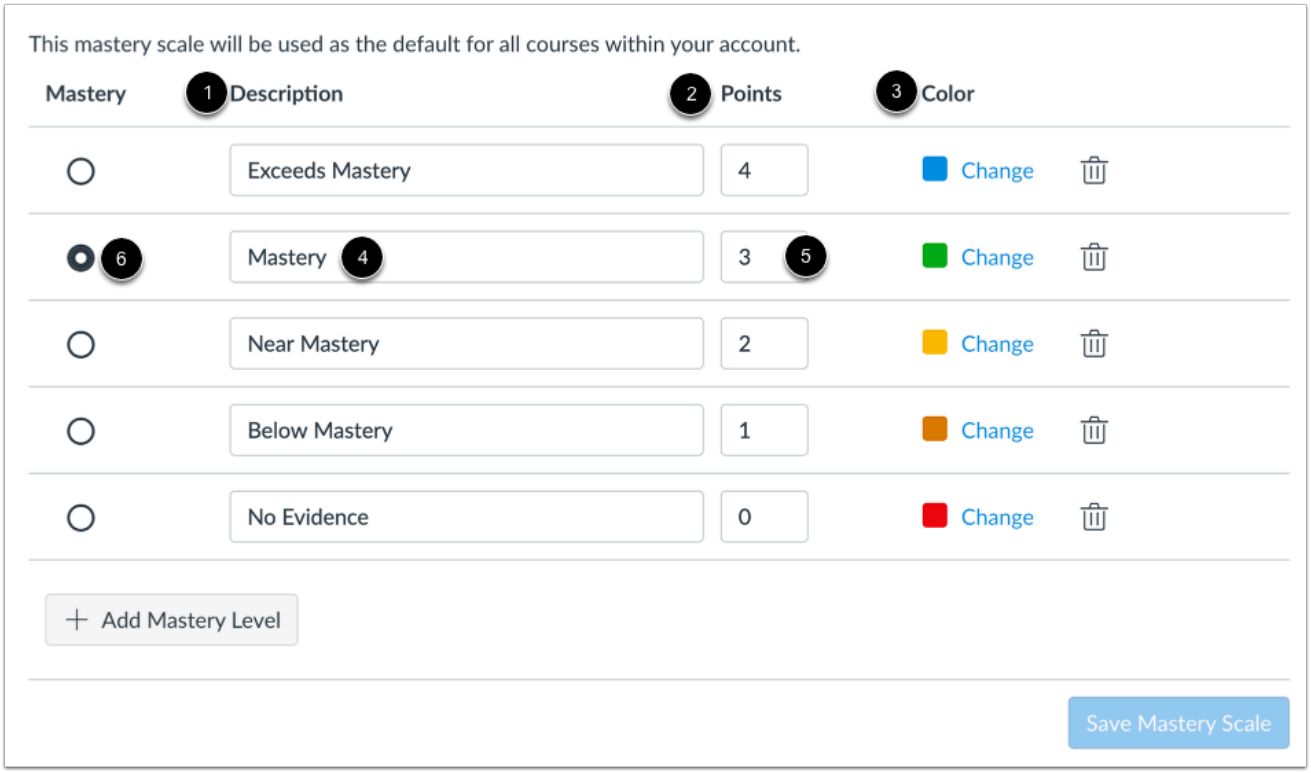
Open Mastery



To view and manage the mastery scale for the account, click the **Mastery** tab.

Note: If the Mastery tab does not display in the Outcomes page, account-level outcome mastery scales have not been enabled by your institution.

Manage Mastery Scale



The Mastery page displays the mastery scale used as the default for all courses in your account. By default, the account mastery scale includes five levels: Exceeds Mastery, Mastery, Near Mastery, Below Mastery, and No Evidence.

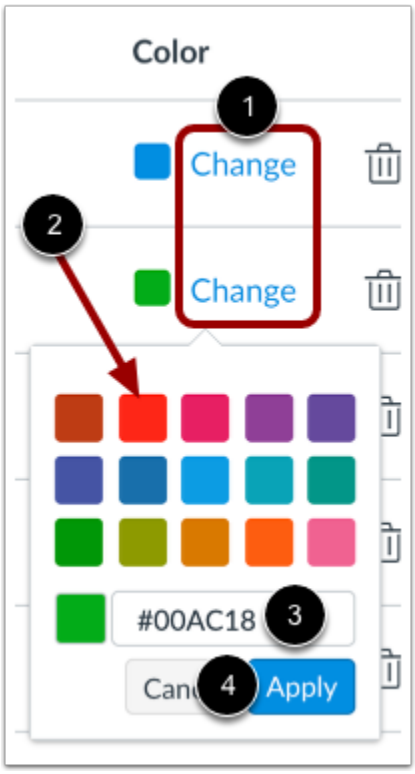
For each mastery level, you can view a description for the level [1], level points [2], and level color [3].

To modify a level description, enter a description in the **Description** field [4].

To modify the point value associated with level achievement, enter a value in the **Points** field [5].

To specify the level that indicates student mastery, locate the level in the list and click the **Mastery** radio button [6].

Change Color



To change the level's color, click the **Change** link [1]. Then click the icon for the color you want to use [2] or enter the color's hex code in the text field [3]. If the hex code is not valid, the field displays a warning icon. Any variation of white is not accepted as a color.

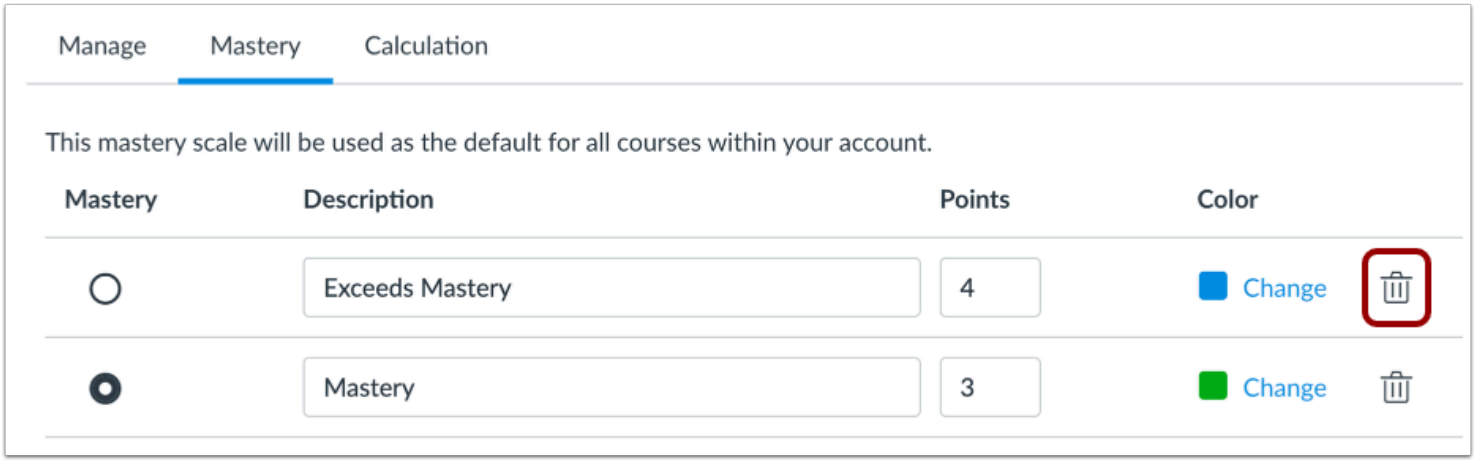
To save your color selection, click the Apply button [4].

Add Mastery Level



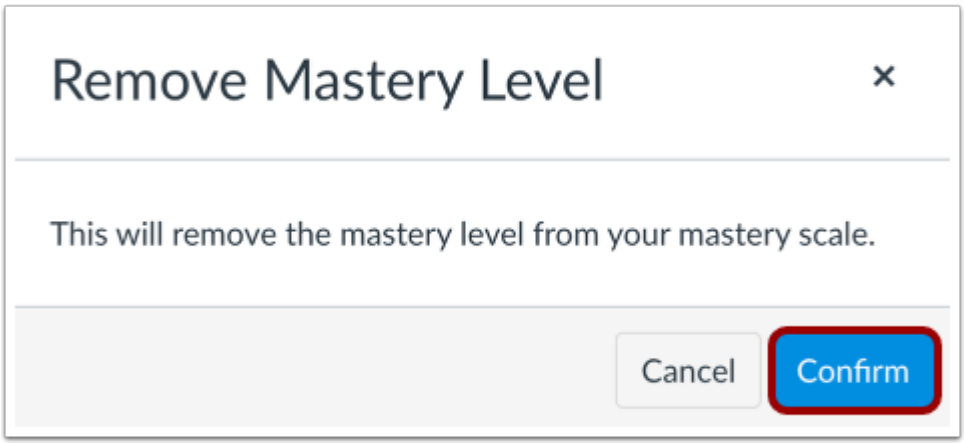
To add a new mastery level, click the **Add Mastery Level** button [1]. The new level displays at the bottom of the list and cannot be moved [2]. However, the mastery levels will be sorted numerically after your changes are saved.

Delete Mastery Level



To delete a mastery level, click the **Delete** icon.

Confirm Deletion



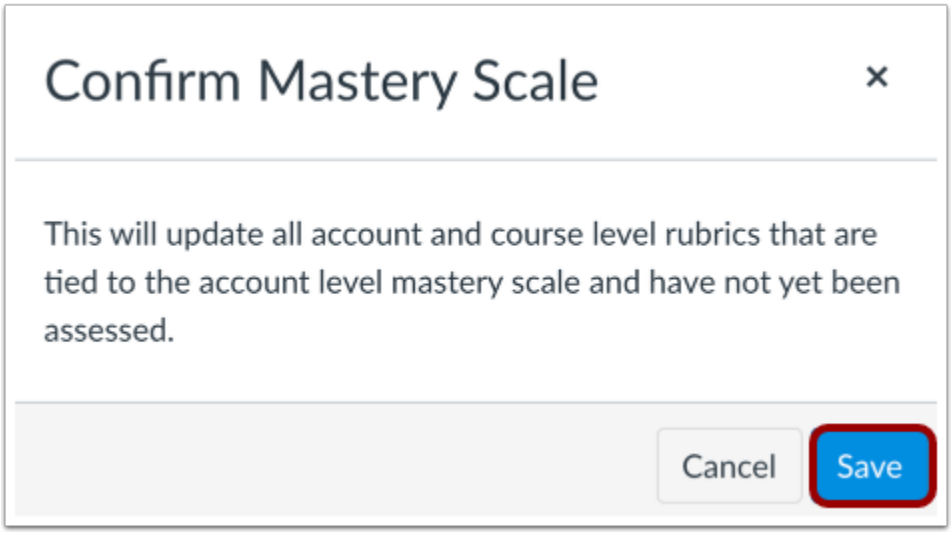
To confirm you want to delete the mastery level, click the **Confirm** button.

Save Mastery Scale



To save changes to the mastery scale, click the **Save Mastery Scale** button.

Confirm Changes



Saving your mastery scale changes will update all rubrics aligned to outcomes that have not been assessed in your account. To confirm your changes, click the **Save** button.

How do I manage outcome mastery calculations in an account?

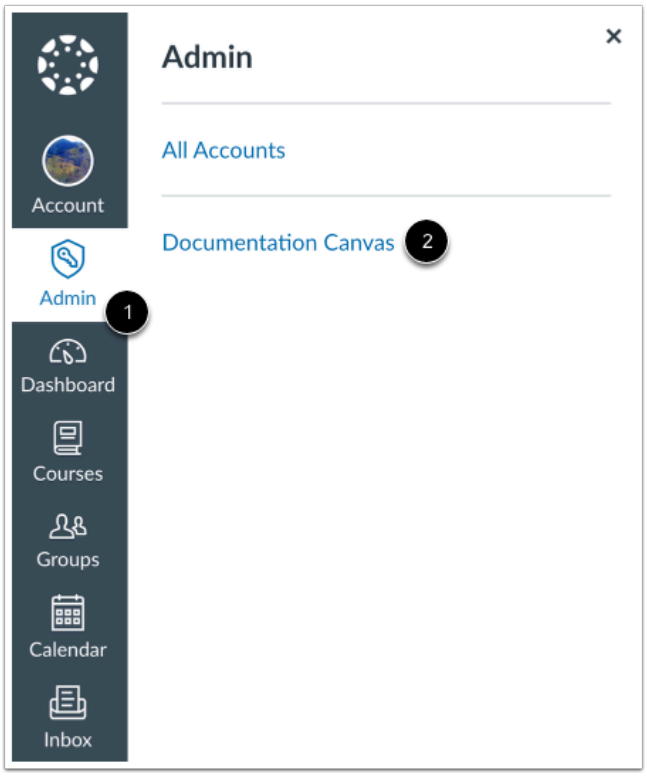
If the Account and Course Level Outcome Mastery Scales feature option is enabled for your account, mastery scales and calculation methods are separated from individual outcomes, and the Outcomes page displays Mastery Scales and Calculation Methods tabs.

From the Calculation tab, you can set mastery calculation methods for the entire account.

Notes:

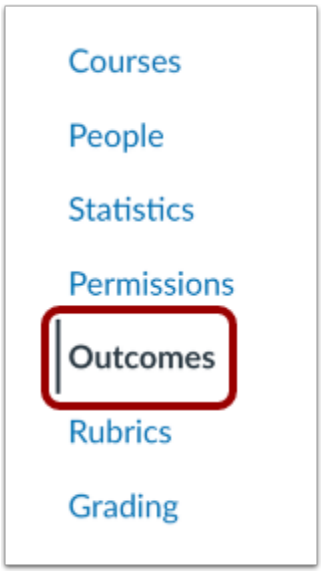
- Enabling the Account and Course Level Outcome Mastery Scales feature option will affect current account data.
- If a rubric with aligned outcomes has been used to assess an assignment before Account and Course Level Outcome Mastery Scales are enabled, the assignment is not affected. However, any assignments that have not been assessed by the rubric are affected if mastery scores are adjusted.

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.

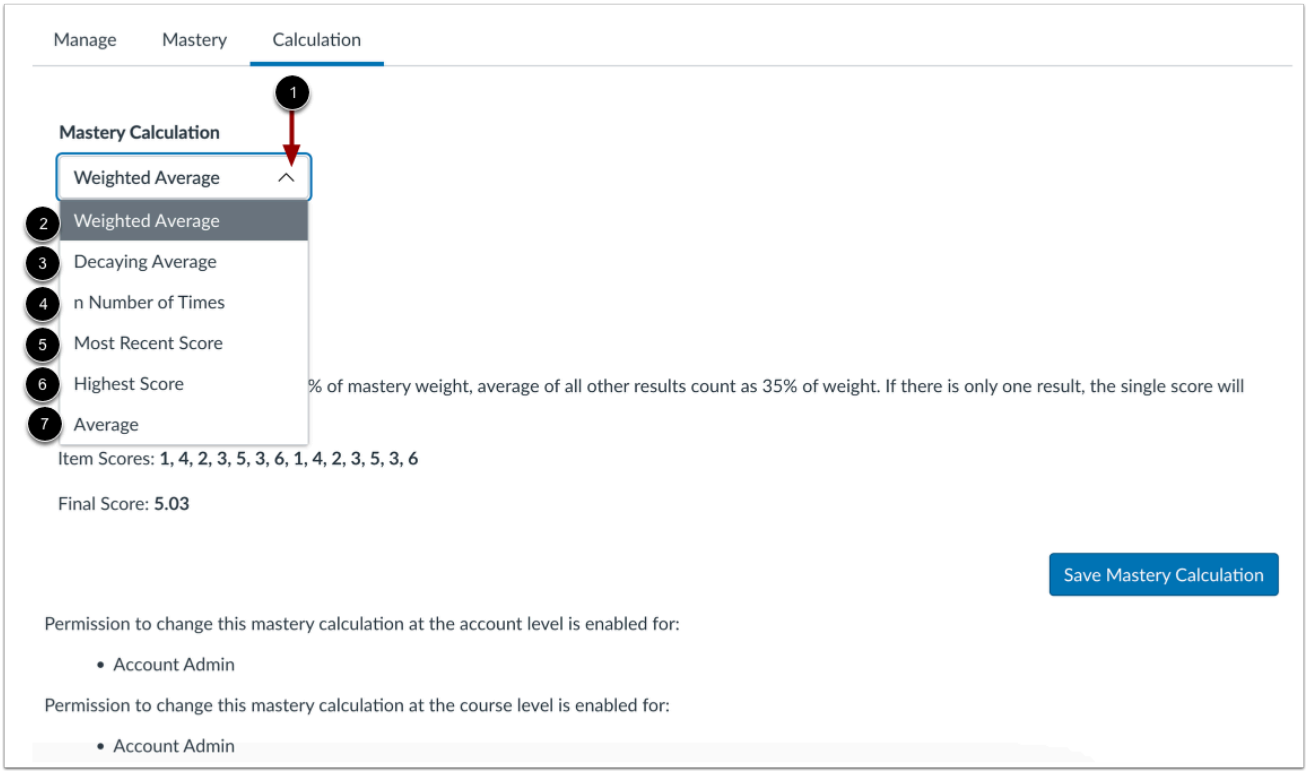
Open Calculations



To view and manage the mastery calculation method, click the **Calculation** tab.

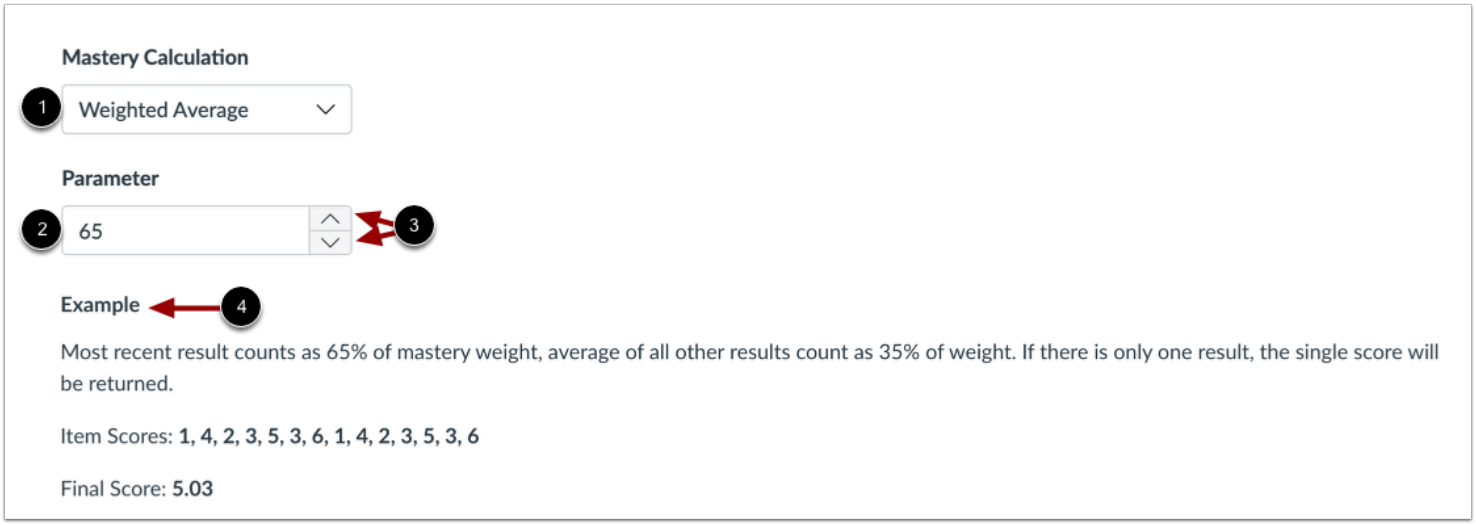
Note: If the Calculation tab does not display in the Outcomes page, account-level outcome mastery calculations have not been enabled by your institution.

Select Calculation Method



To set the mastery calculation method, click the **Mastery Calculation** drop-down menu [1]. You can select between the following calculation methods: Weighted Average [2], Decaying Average [3], n Number of Times [4], Most Recent Score [5], Highest Score [6], and Average [7].

Select Weighted Average



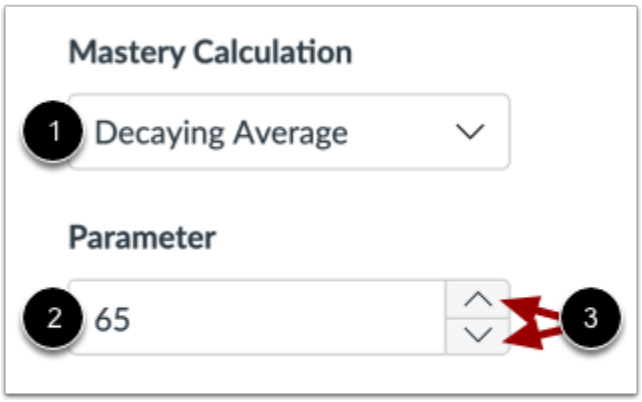
To average assessment item scores with a greater weight for the most recent assessment item, select the **Weighted Average** option [1].

The Weighted Average calculation splits the total percentage between the most recent assessment item and an average of all prior assessment items. For example, you can set the most recent submission to be weighted at 40% of the total and prior items to be weighted at 60% of the total.

Enter the percentage to use for the most recent result in the **Parameter** field [2]. You can also increase or decrease the parameter by using the **Arrow** icons [3]. The Parameter field accepts whole numbers between 1 and 99. By default, the parameter is set to 65%. The remaining amount is used to weigh prior scores.

In the **Example** section [4], the calculation updates based on your select parameter. The average is rounded to the next two decimals. If there is only one result, the single score will be displayed.

Select Decaying Average



To average assessment item scores with a greater weight for the most recent assessment item, select the **Decaying Average** option [1].

The Decaying Average calculation uses a formula to determine proficiency based on students' average scores, giving more weight to the most recent scored. To determine the weight given to the most recent score, the formula uses a decay rate. The higher the formula's decay rate, the more heavily the most recent assessment is weighted.

By default, the decay weight is set to 65% in the **Parameter** field [2]. However, you can adjust the rate to any percentage between 50% and 99% using the **Arrow** icons [3]. Between two assessments, the most recent assessment gets 65% weight and the first gets 35%. For each additional assessment, the sum of the previous score calculations decay by an additional 35%.

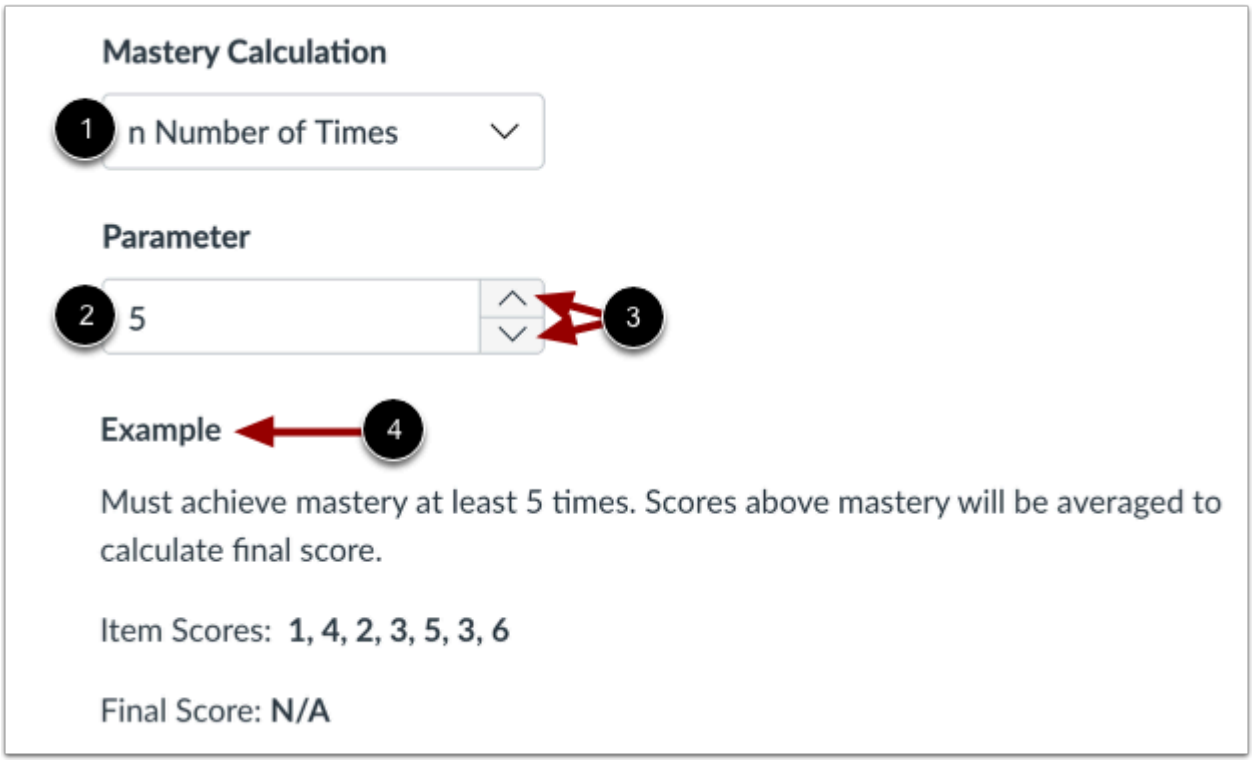
For example, a student has scores of 1, 2, 3, 4 (scores listed chronologically from oldest to most recent):

(1 × .35) + (2 × .65) = X

(X × .35) + (3 × .65) = Y

(Y × .35) + (4 × .65) = Z (this being the current standard score; 3.48)

Select n Number of Times



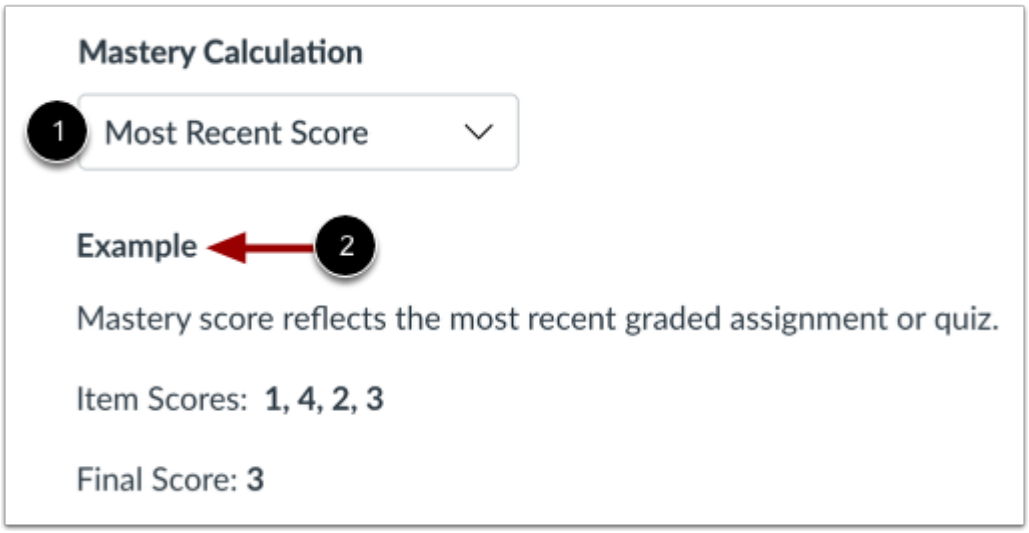
To set a number of times that a student must meet or exceed mastery on a set amount of aligned items, select the **n Number of Times** option [1].

Enter the number of times mastery must be achieved in the **Parameter** field [2]. You can also increase or decrease the parameter by using the **Arrow** icons [3]. The Parameter field accepts numbers between 1 and 10.

Any scores that do not meet mastery are not used in the calculation.

You can view an example of the n Number of Times calculation in the **Example** section [4].

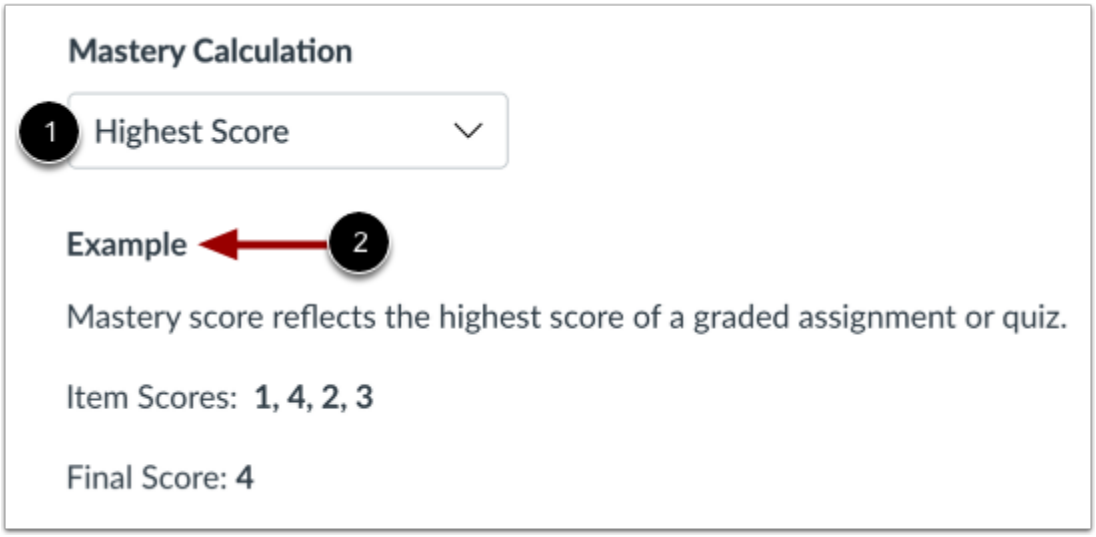
Select Most Recent Score



To select the score for most recently graded item, select the **Most Recent Score** option [1].

You can view an example of the Most Recent Score calculation in the **Example** section [2].

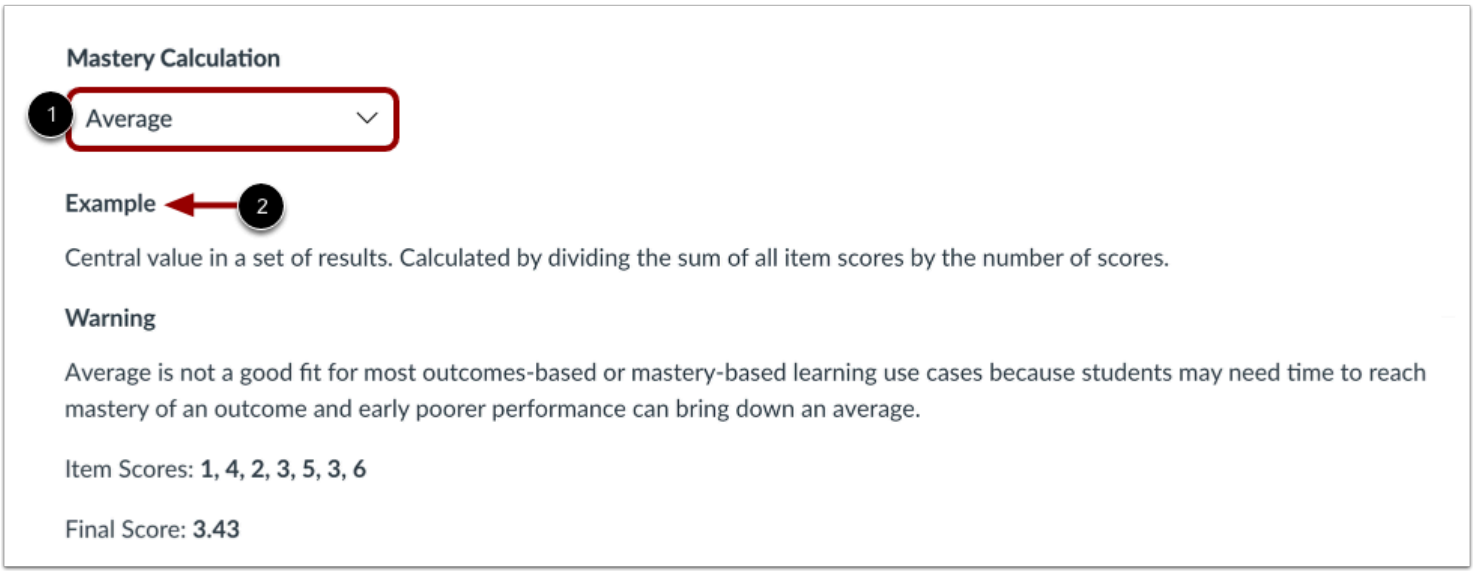
Select Highest Score



To select the highest score from all assessment items, select the **Highest Score** option [1].

You can view an example of the Highest Score calculation in the **Example** section [2].

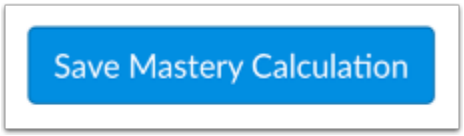
Select Average



To select the average score from all assessment items, select the **Average** option [1].

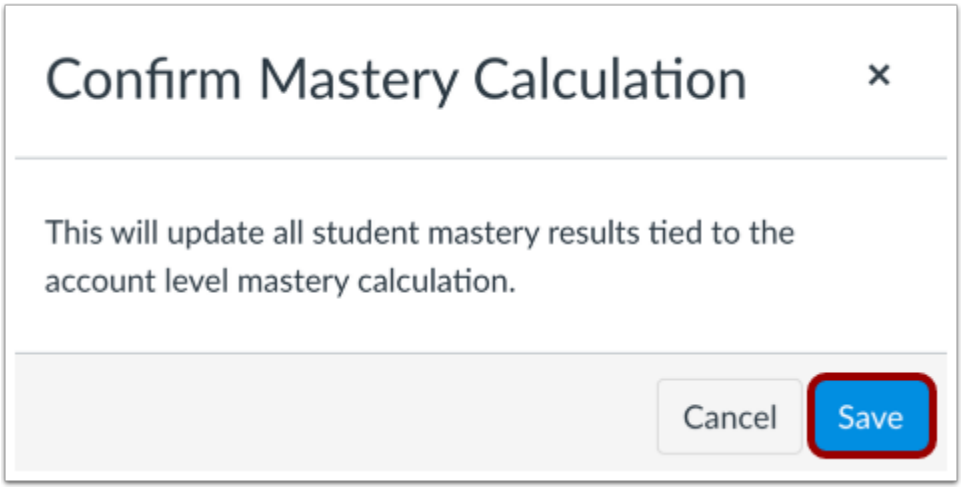
You can view an example of the Average calculation in the **Example** section [2].

Save Calculation Method



To save your calculation method, click the **Save Mastery Calculation** button.

Confirm Calculation Changes



To confirm your changes to the mastery calculation, click the **Save** button.

Improved Outcomes Management

How do I use the outcomes page in an account in Improved Outcomes Management?

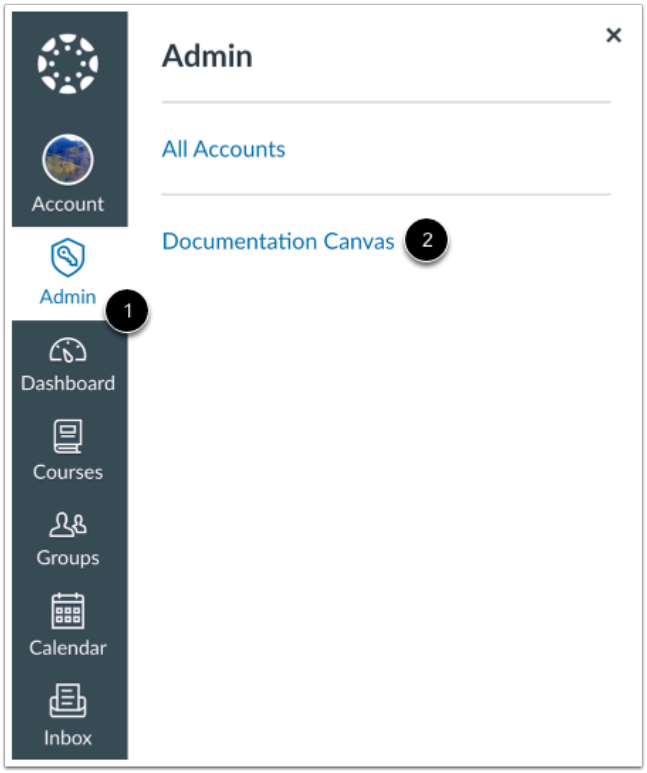
The Improved Outcomes Management feature option provides an improved user interface for managing outcomes in your account.

Outcomes are used to track mastery in an account or course. From the account outcomes page, you can create and manage outcomes, create outcome groups, import outcomes, and manage rubrics for an account.

Notes:

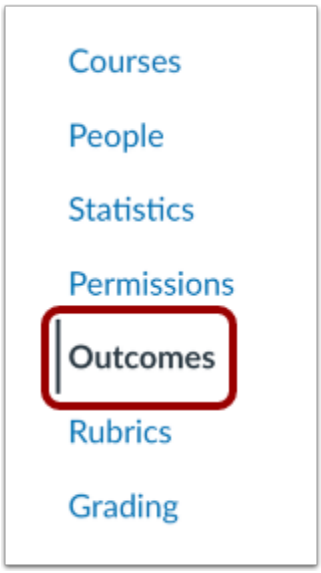
- If your Outcomes page looks different than this guide, your institution does not have the Improved Outcomes Management feature option enabled. Please refer to the Outcomes guides for more information.
- The Account and Course Level Outcome Mastery Scales feature option must also be enabled to set mastery scales and calculation methods.

Open Account



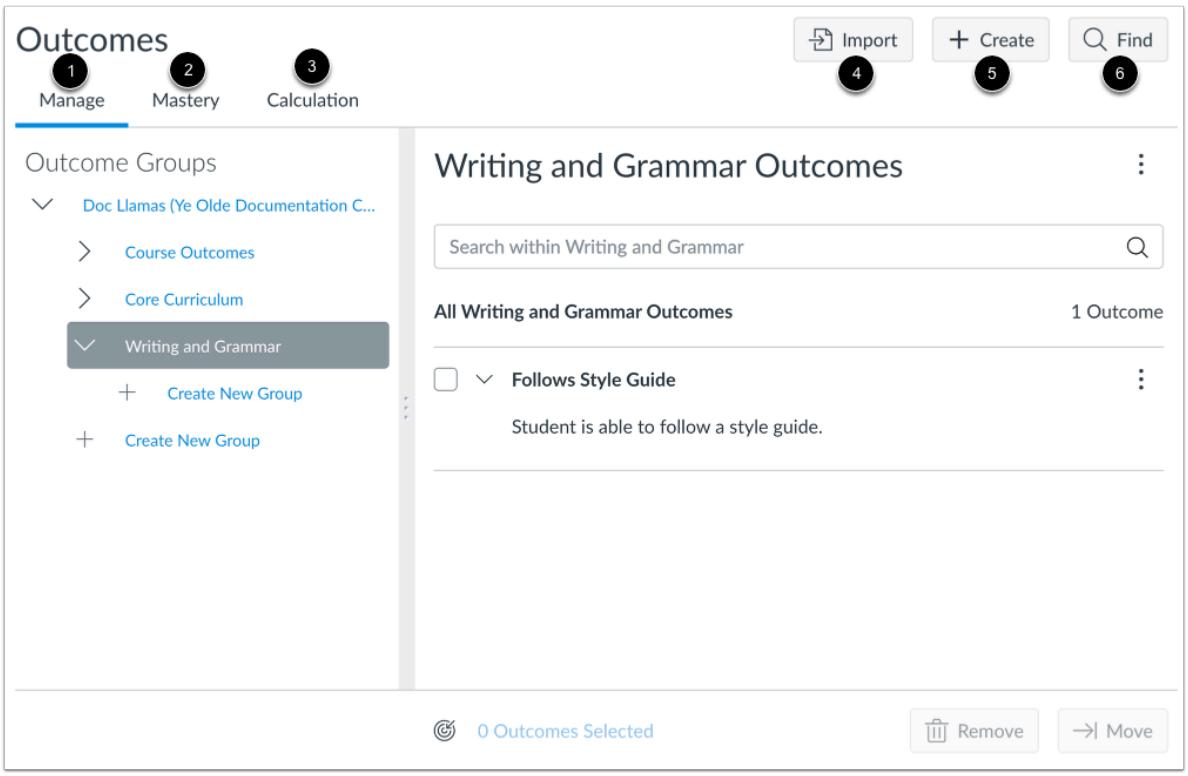
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



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

View Outcomes



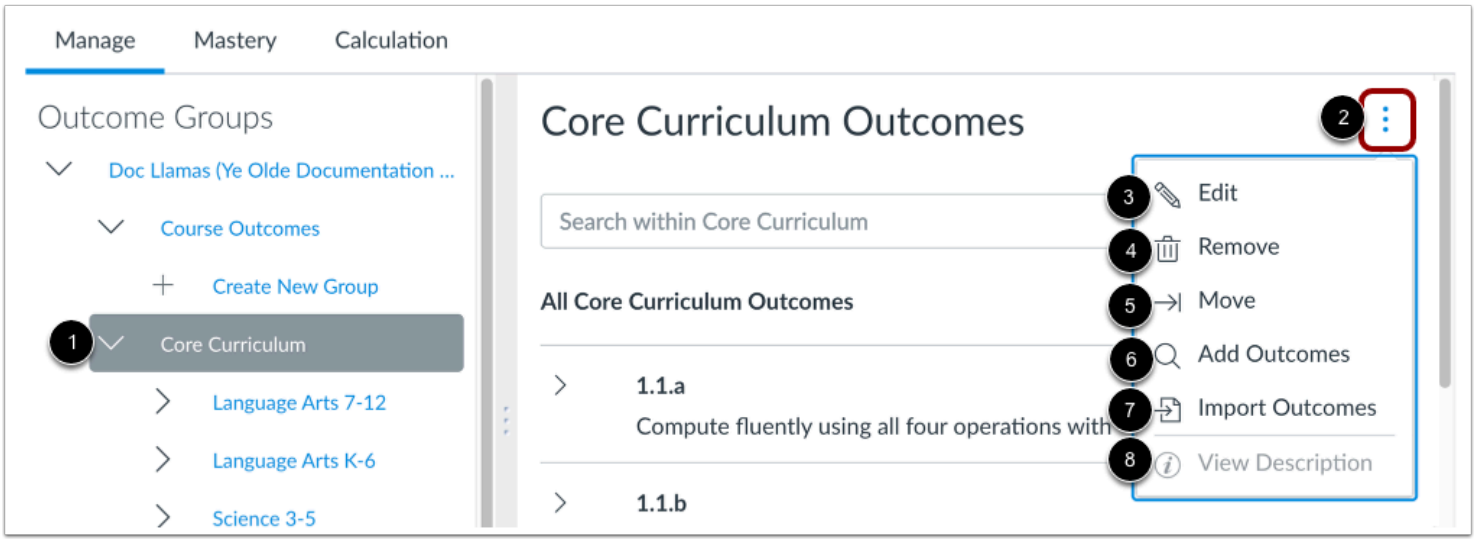
On the Outcomes page, you can view and manage outcomes and outcomes groups [1], mastery scale settings [2], and calculation method settings [3].

To import an outcome, click the **Import** button [4].

To create a new outcome, click the **Create** button [5].

To find an outcome, including State and Common Core Standards, click the **Find** button [6].

View Outcome Group Options



To view options for managing outcomes groups, select an outcome group from the Outcome Groups sidebar [1].

In the Outcomes area, click the **Options** icon for the outcome group [2].

To edit the outcome group, click the **Edit** option [3].

To remove the outcome group and all outcomes within the group, click the **Remove** option [4].

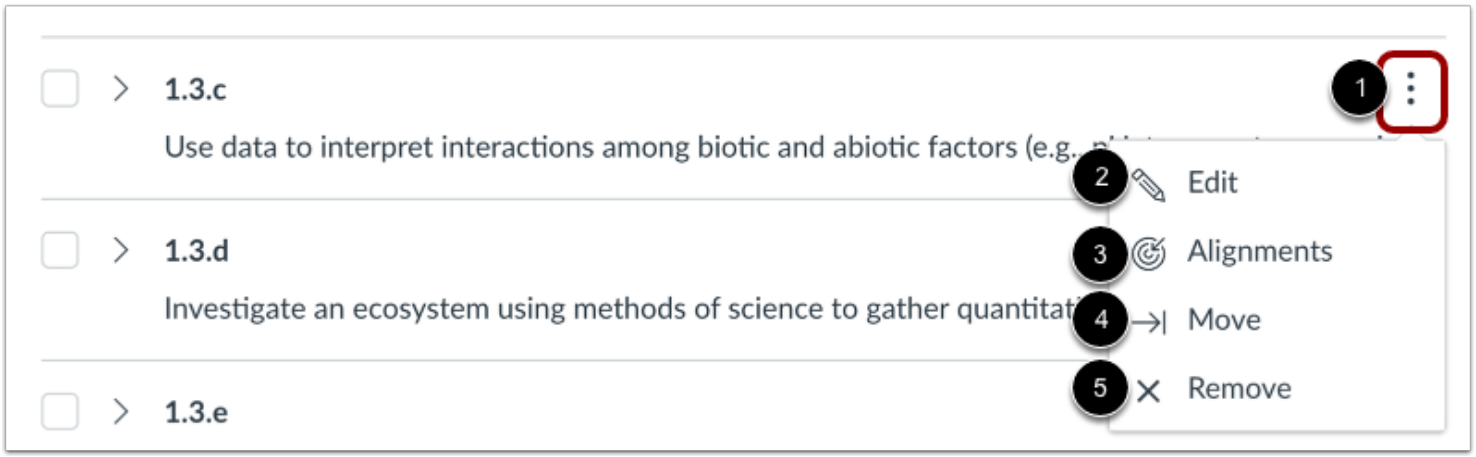
To move the outcome group to another group, click the **Move** option [5].

To add outcomes, click the **Add Outcomes** option [6].

To import outcomes to the outcome group, click the **Import Outcomes** option [7].

To view the outcome group's description, click the **View Description** option [8].

View Outcome Options



To view options for managing an individual outcome, click the **Options** icon for the outcome [1].

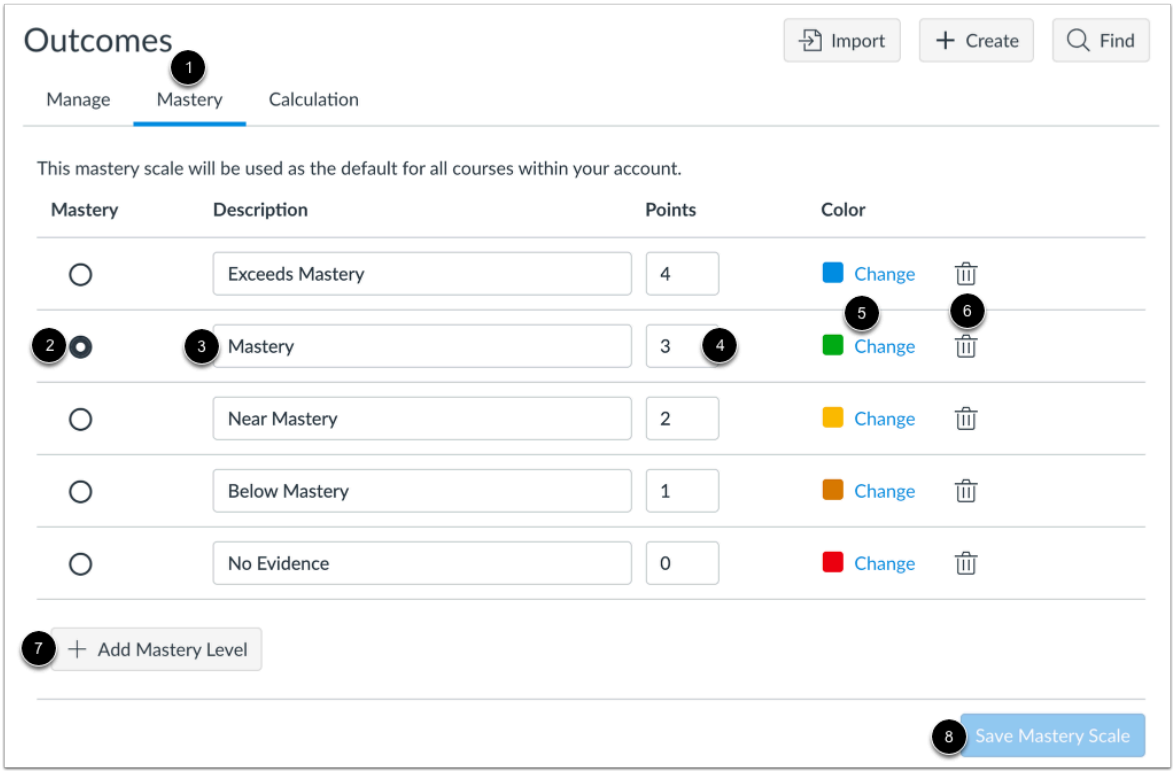
To edit the outcome, click the **Edit** option [2].

To view the assignments aligned to the outcome, click the **Alignments** link [3].

To move the outcome to another outcome group, click the **Move** option [4].

To remove the outcome, click the **Remove** option [5]. If the outcome is already associated with assignments in your account, you will not be able to remove the outcome.

View Mastery Settings



To view the default mastery scale for all courses within your account, click the **Mastery** tab [1].

To set the mastery level in the scale, select the desired level in the **Mastery** column [2].

To add or modify the mastery level description, enter a description in the **Description** field [3].

To modify the point value associated with the mastery level, enter a point value in the **Points** field [4].

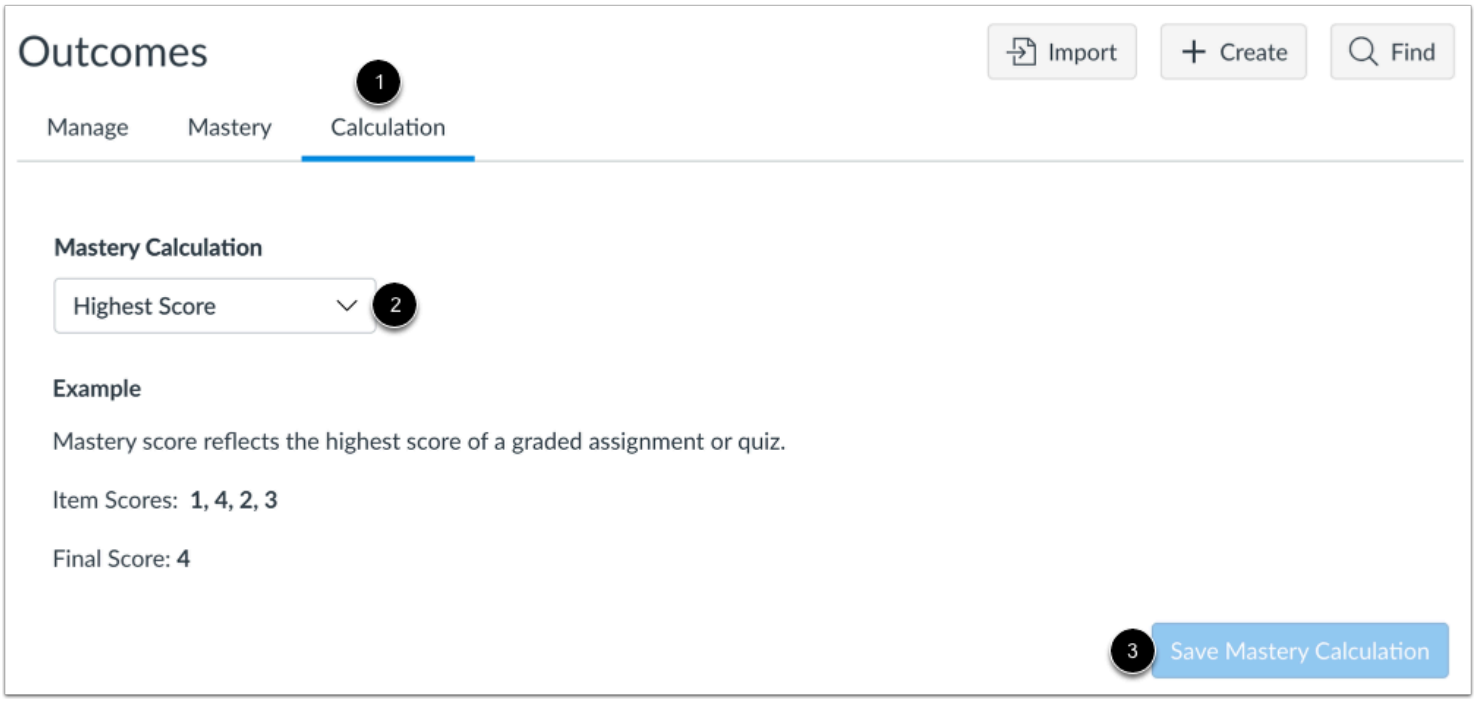
To change the color associated with the mastery level, click the **Change** link or color selector in the **Color** column [5].

To remove a mastery level from the scale, click the **Remove** icon for the level you want to remove [6].

To add a mastery level to the scale, click the **Add Mastery Level** button [7].

To save your changes to the mastery scale, click the **Save Mastery Scale** button [8].

View Calculation Settings



To view the default mastery calculation method for your account, click the **Calculation** tab [1].

To change the default mastery calculation method, select a method from the **Mastery Calculation** drop-down menu [2].

Some calculation methods may require additional settings.

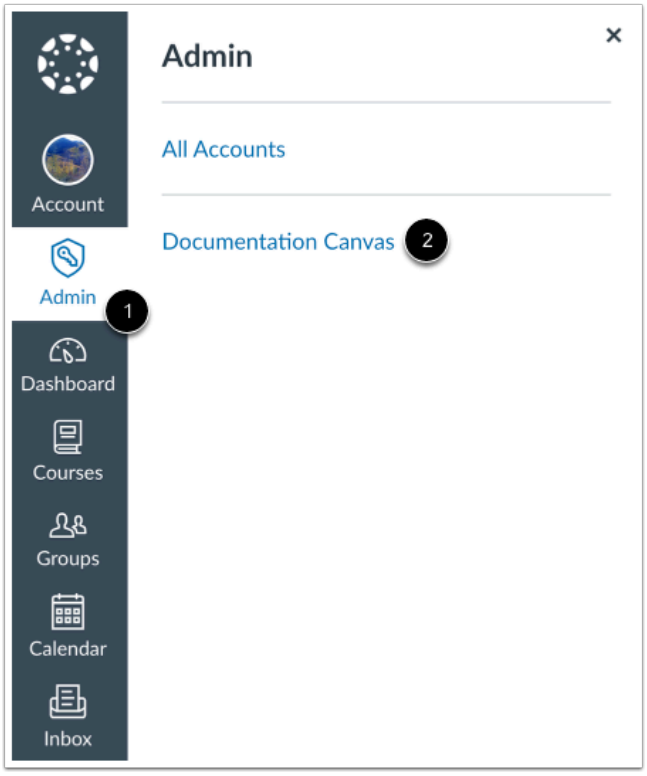
To save the mastery calculation settings, click the **Save Mastery Calculation** button [3].

How do I create an outcome for an account in Improved Outcomes Management?

If you cannot find an outcome to use, you can create a new outcome for the account. Outcomes can be created from the account, sub-account, or course level.

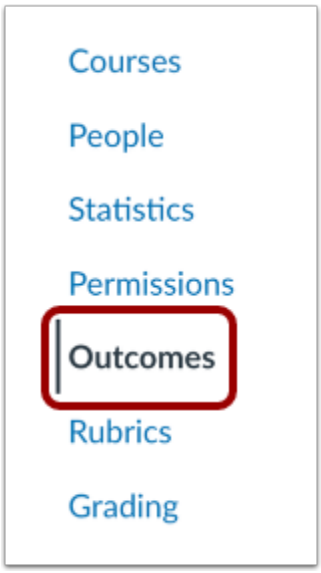
Outcomes can be included in assignment rubrics as a way to assess mastery of outcomes aligned to specific assignments.

Open Account



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

Open Outcomes



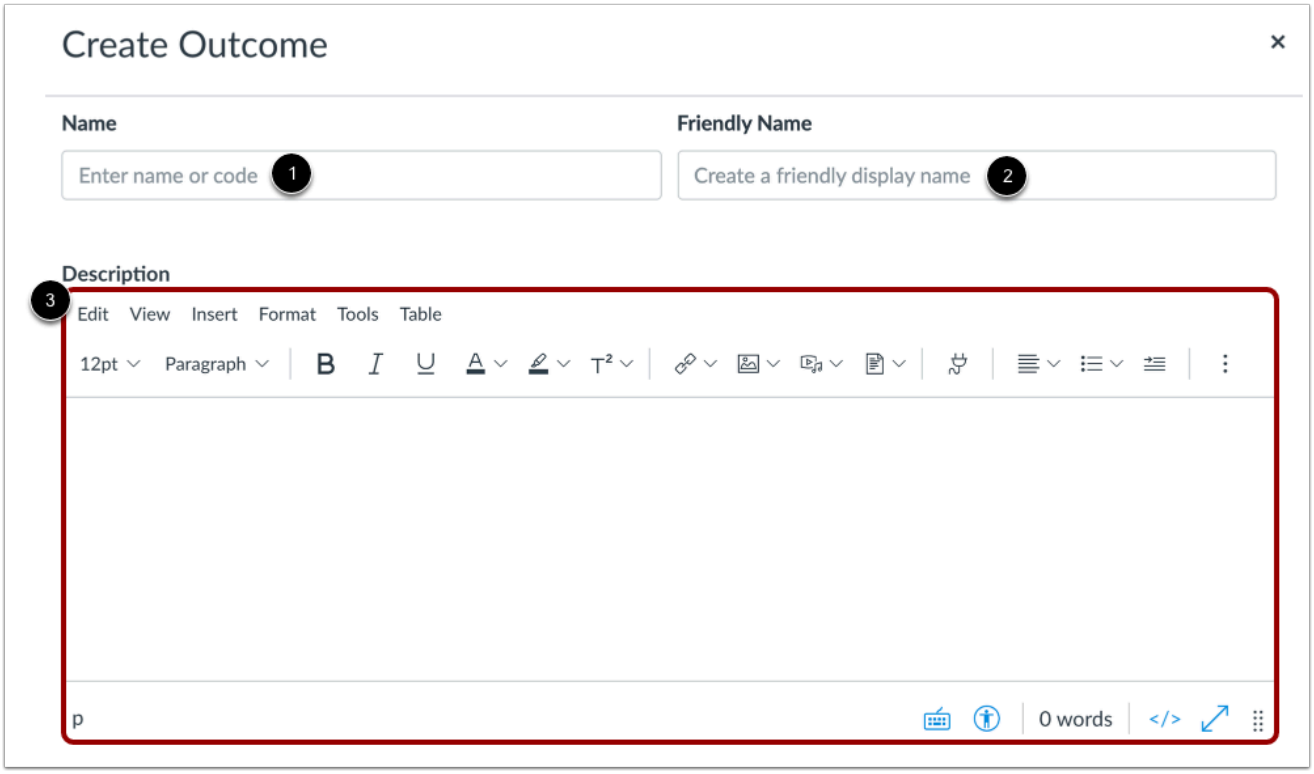
In Account Navigation, click the **Outcomes** link.

Create New Outcome



To create a new outcome, click the **Create** button.

Create Outcome

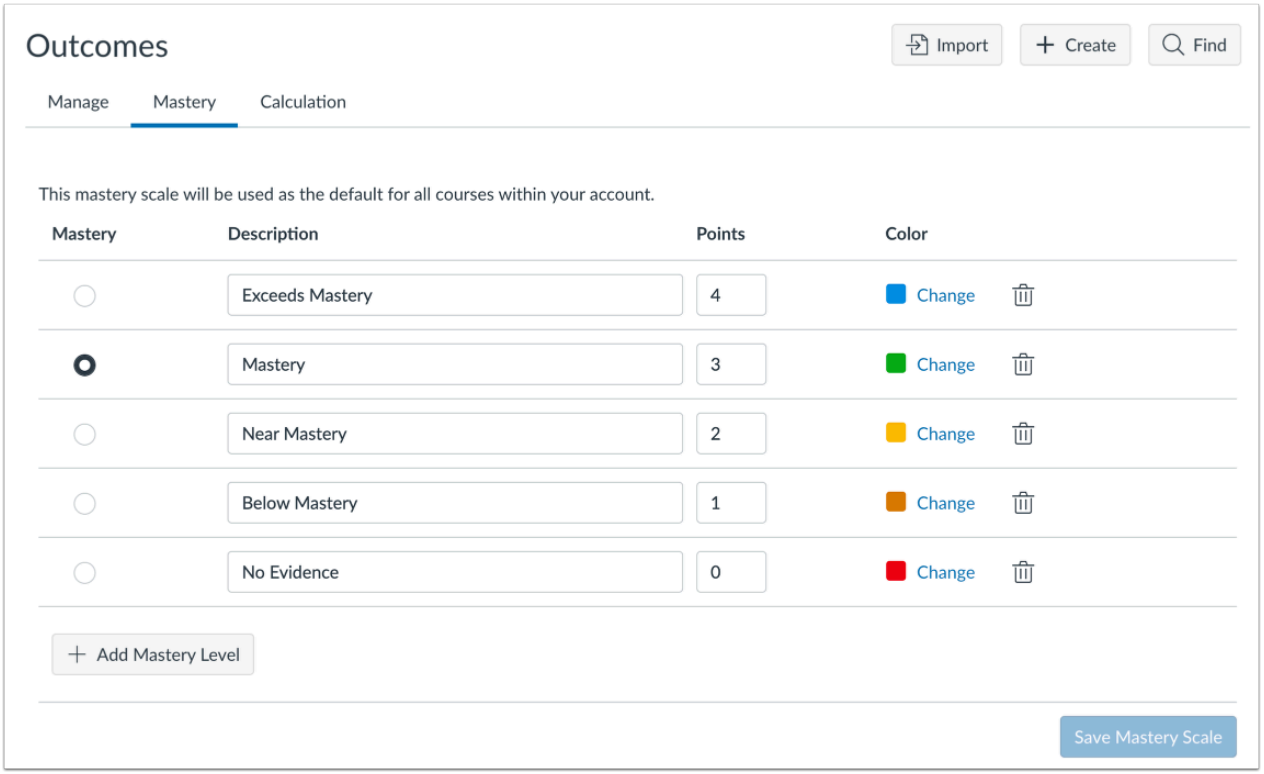


Enter the name or code for the outcome in the **Name** field [1].

To add a friendly name for the outcome, enter a name in the **Friendly Name** field [2].

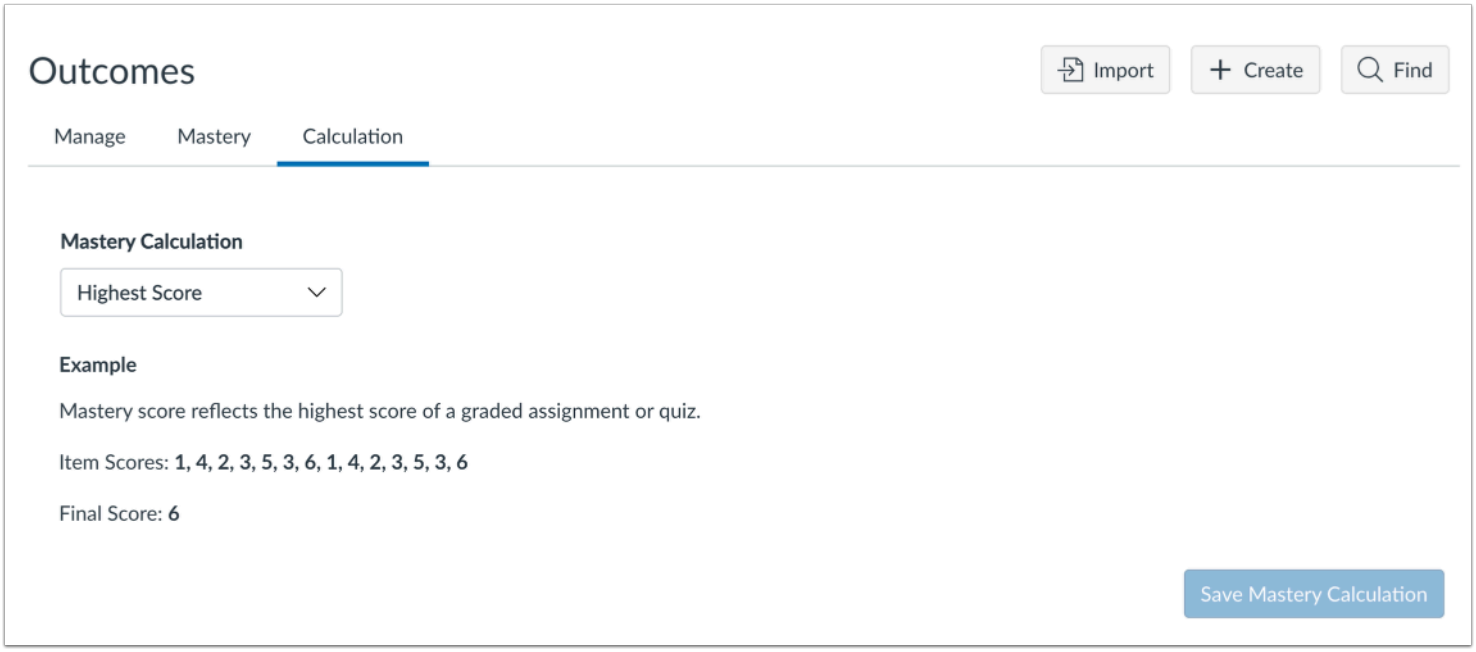
Use the Rich Content Editor to add an outcome description in the **Description** field [3].

Modify Mastery Scale



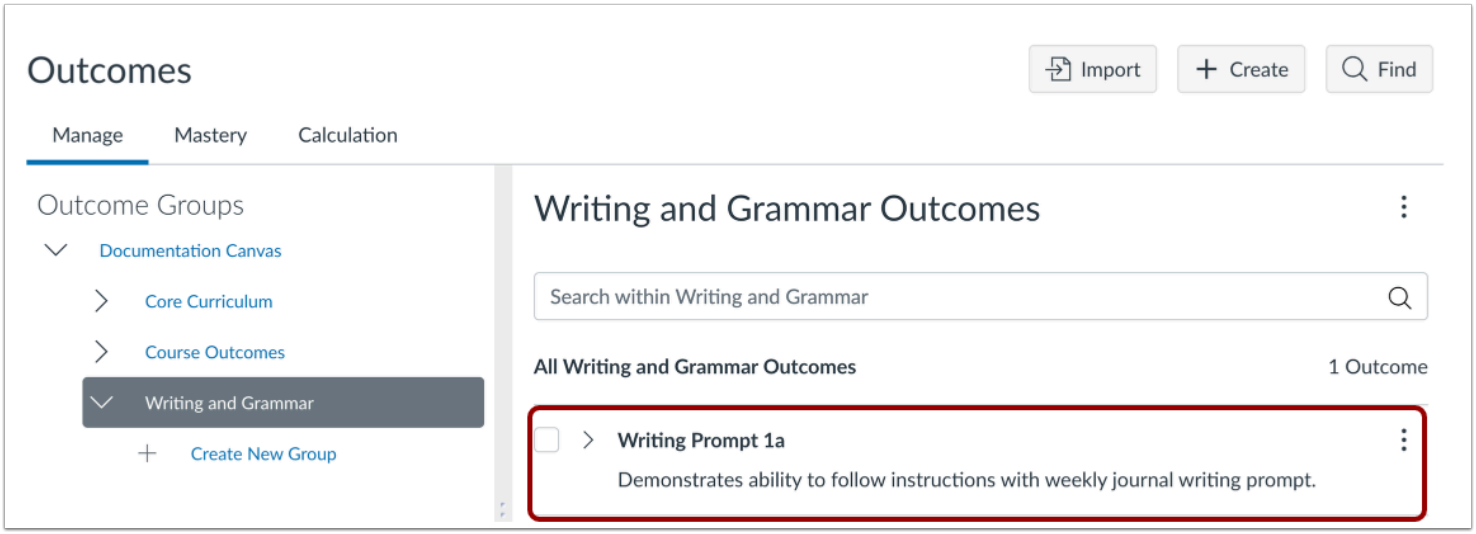
You can make changes to outcome mastery scales in the **Mastery** tab.

Modify Mastery Calculation Method



You can make changes to calculation methods in the **Calculation** tab.

View Outcome

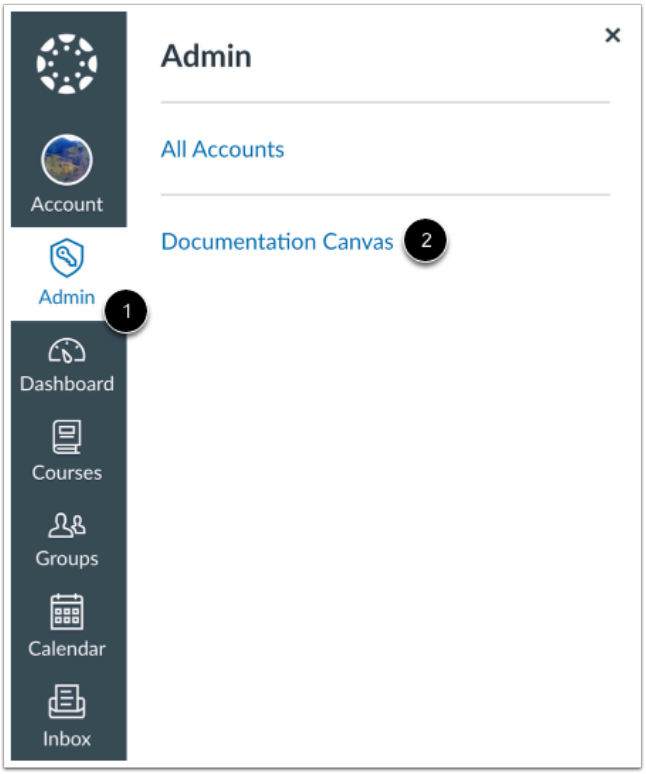


View your newly created outcome.

How do I create outcome groups for an account in Improved Outcomes Management?

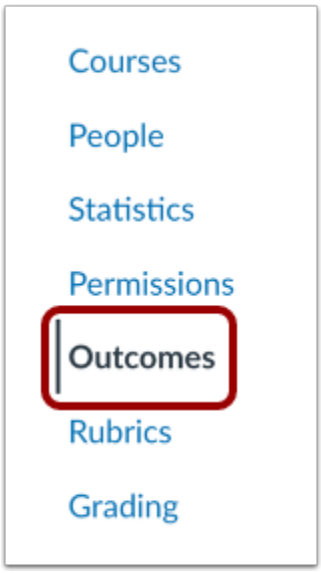
Grouping learning outcomes in an account allows for organization of multiple related outcomes.

Open Account



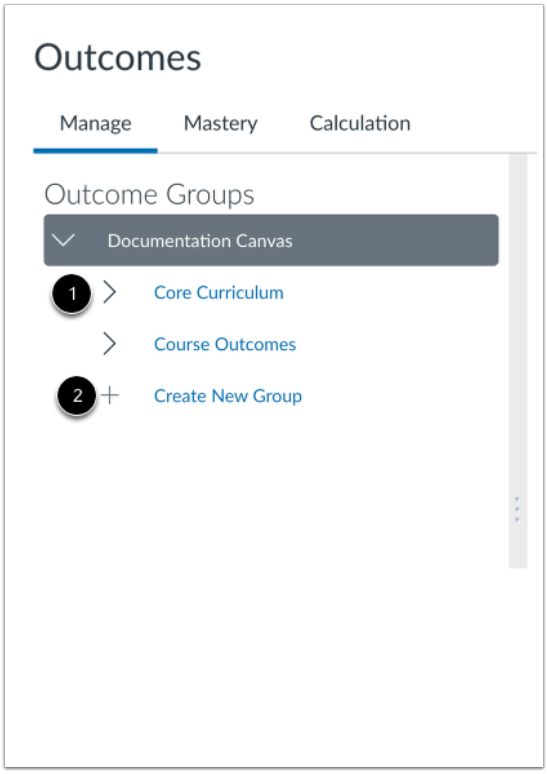
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



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

View Outcome Groups

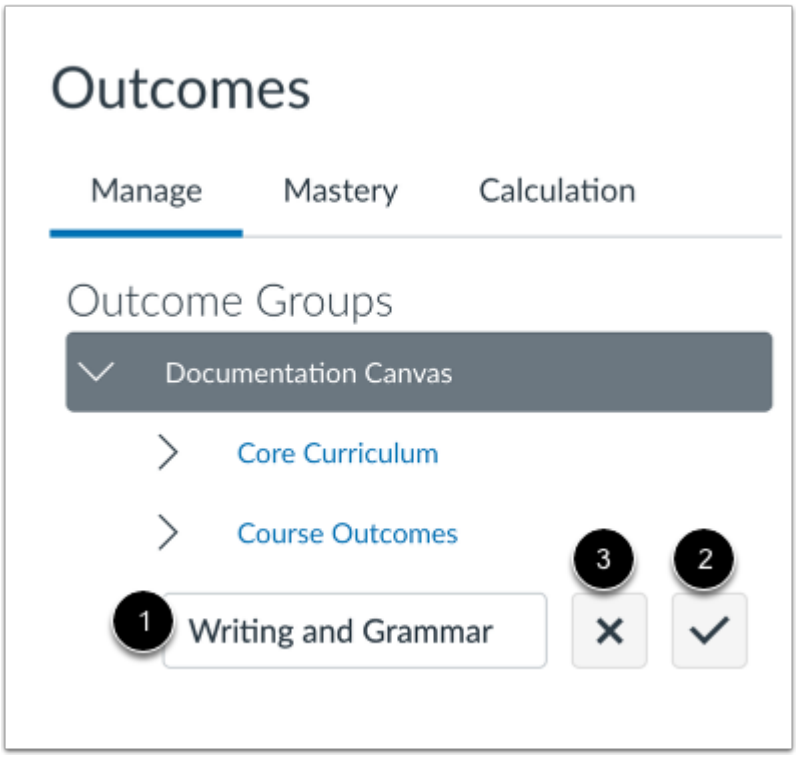


You can create an outcome group within your account. You can nest outcome groups within other groups for improved organization.

To view outcome groups nested within other groups, click the name of an outcome group [1].

To create a new group, click the **Create New Group** link [2].

Create Outcome Group



To create a new outcome group, enter a group name in the **Group Name** field [1]. Then click the **Confirm** button [2].

To reset the Group Name field, click the **Clear** button [3].

How do I edit or remove an account outcome in Improved Outcomes Management?

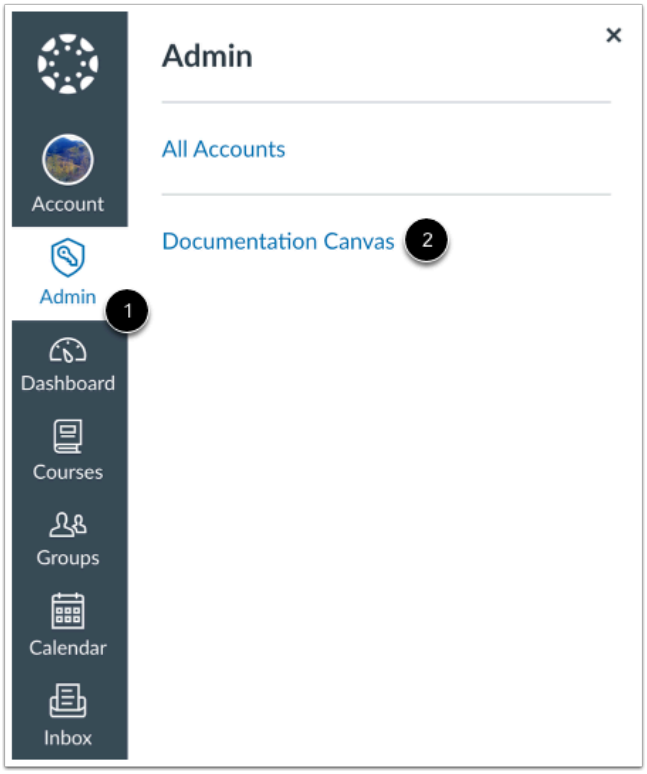
You can edit outcomes you have created in your account. You can also remove outcomes from your account.

This lesson displays how to edit or remove outcomes in an account that has enabled the Improved Outcomes Management feature option. If the Outcomes page in your account displays differently than the images in this lesson, learn how to edit or remove outcomes in the classic Outcomes page view.

Notes:

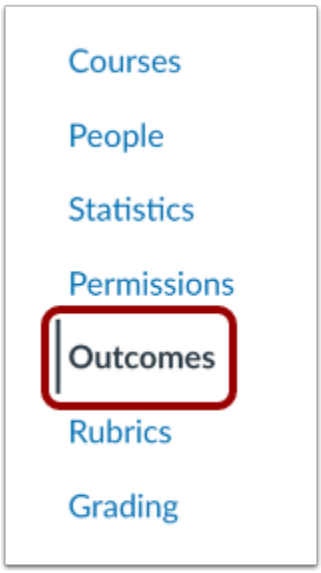
- If an outcome does not include an Edit or Delete link, it is an account level outcome or an imported outcome that cannot be edited or deleted.
- Outcomes that have been aligned with an assignment or question bank cannot be deleted unless they are removed from the assignment or question bank. Outcomes that have been used to assess a student cannot be deleted.

Open Account



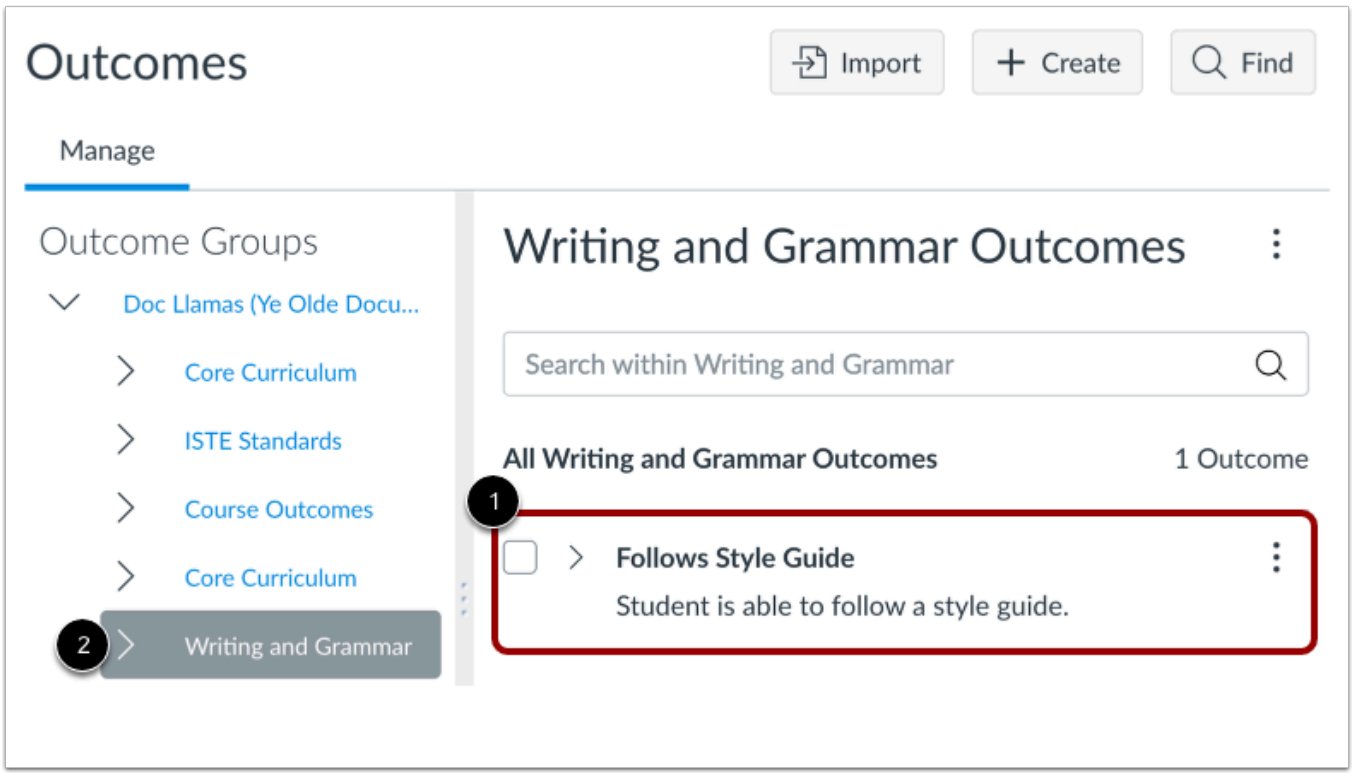
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



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

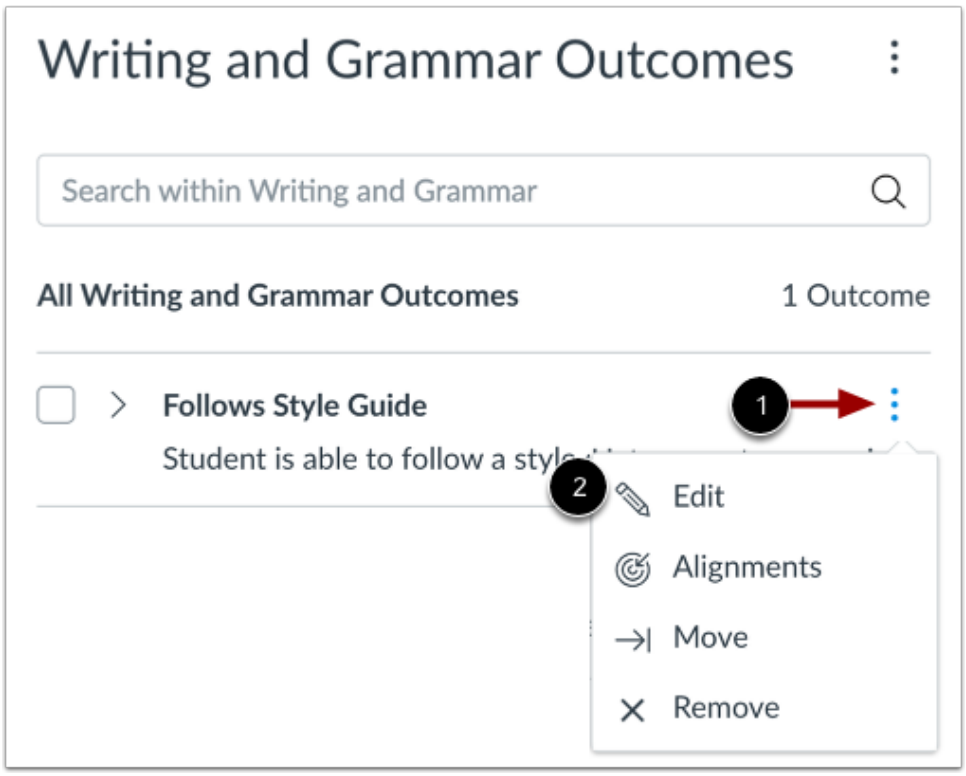
Select Outcome



Locate the outcome you want to modify [1]. In order to view your outcome, you may first need to click the outcome group [2].

Learn how to use the Outcomes page.

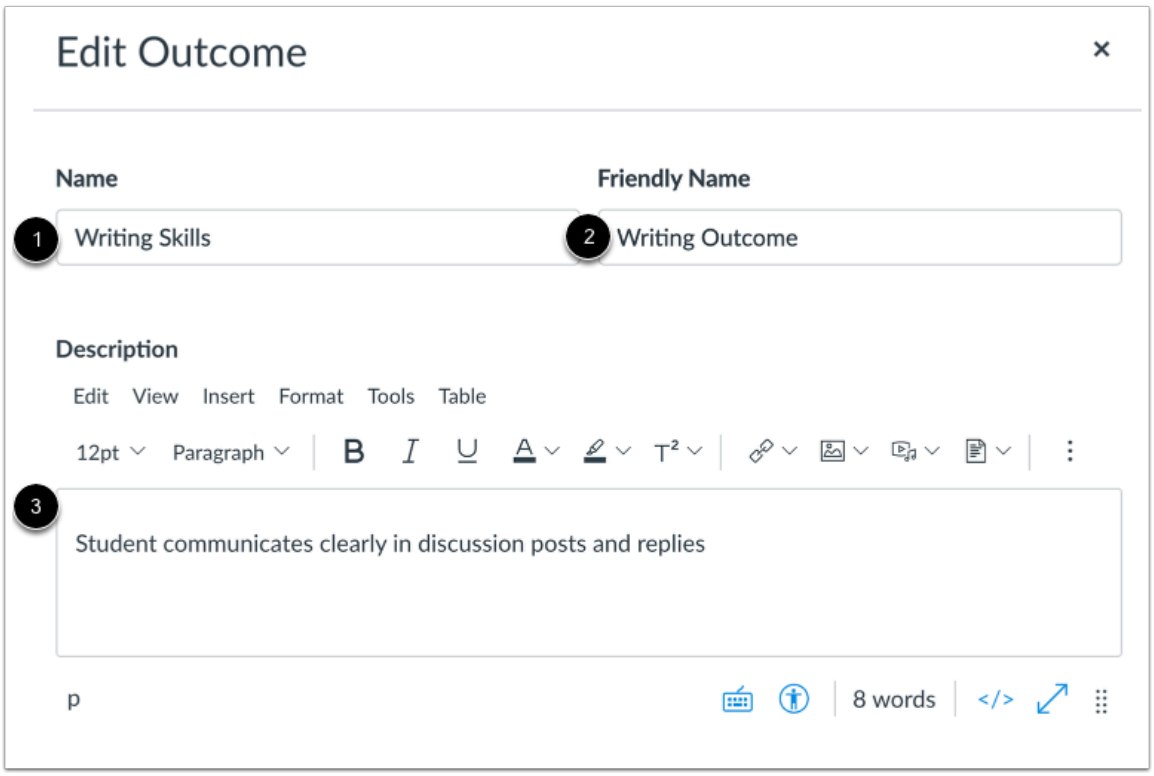
Modify Outcome



To edit an outcome, click the **Options** icon [1]. Then click the **Edit** link [2].

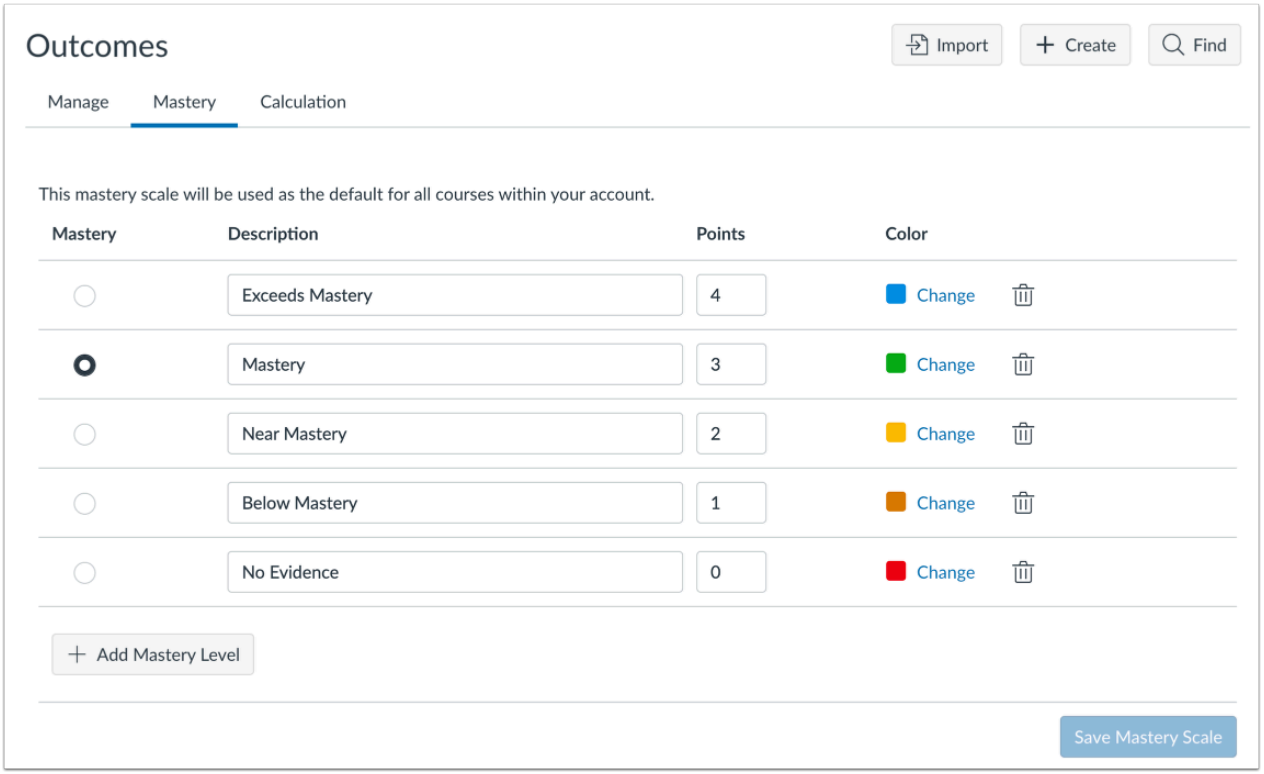
Note: If you cannot use the Edit link for an outcome, it may be an imported outcome.

Edit Outcome



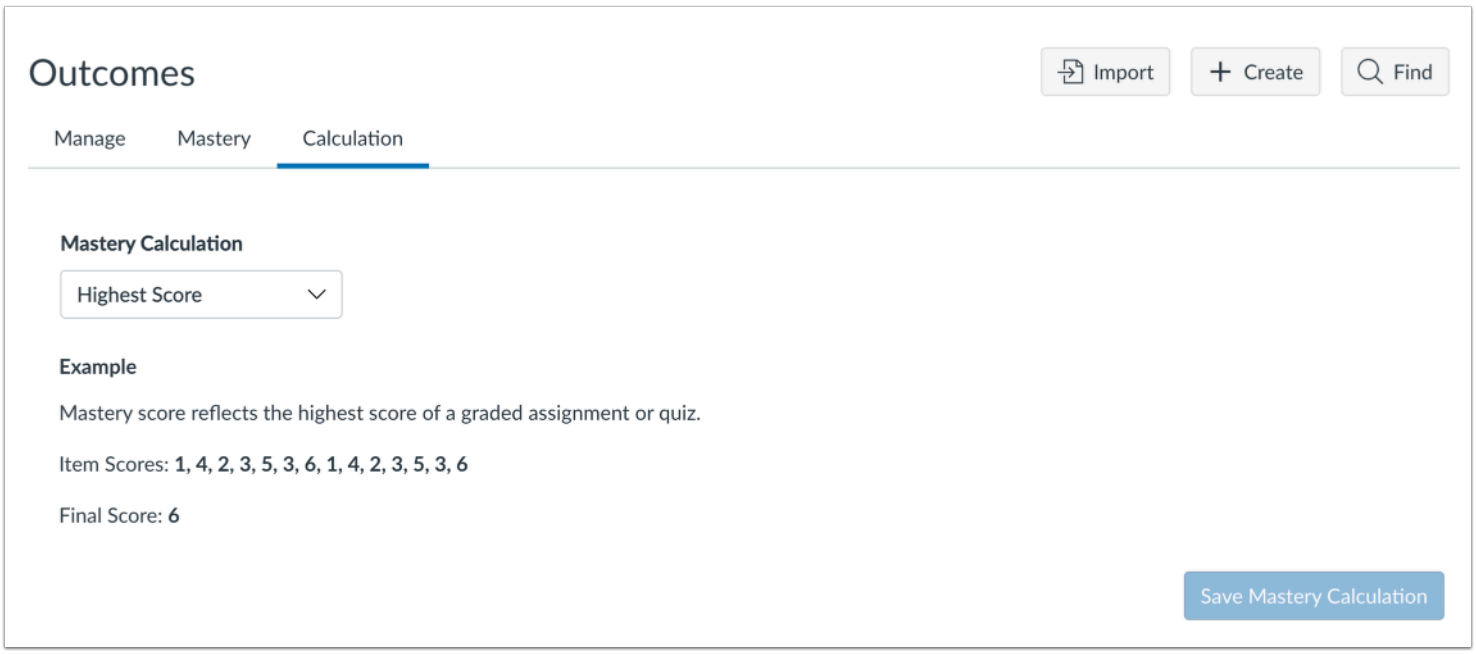
You can edit the name [1], friendly name [2], and description [3] for the outcome.

Modify Mastery Scale



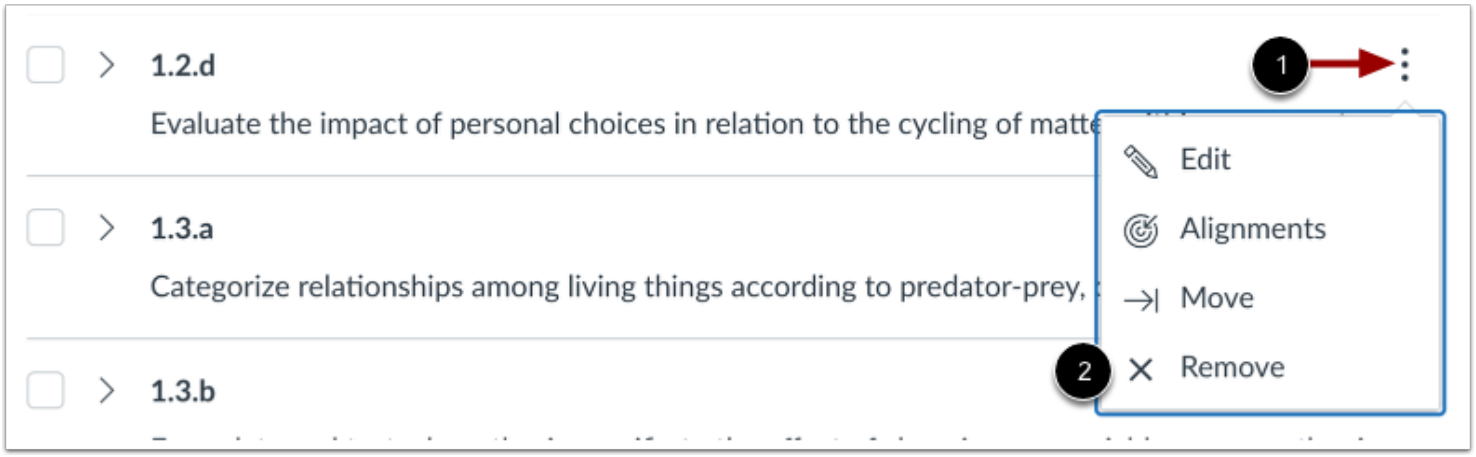
You can make changes to outcome mastery scales in the **Mastery** tab.

Modify Mastery Calculation Method



You can make changes to calculation methods in the **Calculation** tab.

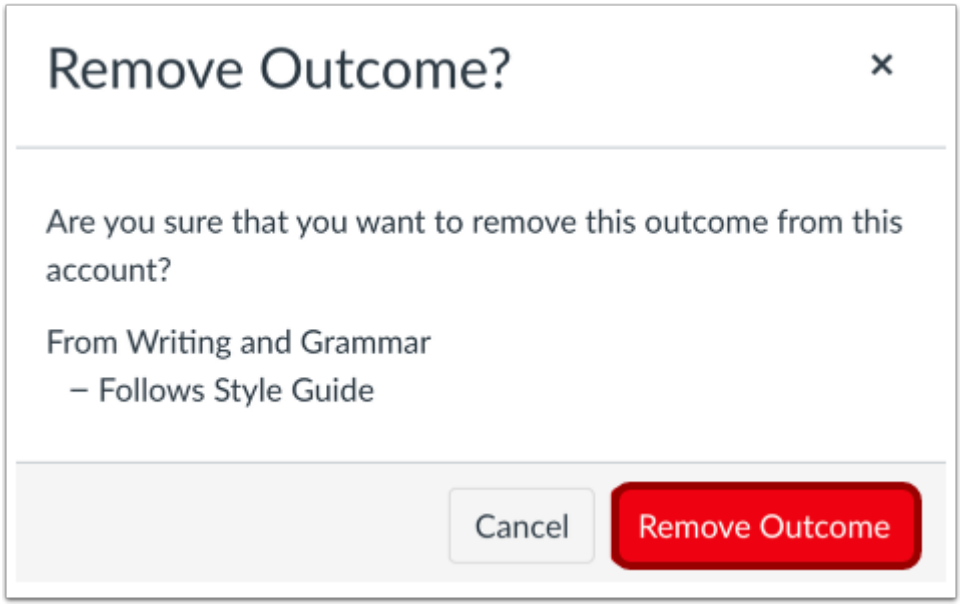
Remove Outcome



To remove an outcome from your account, click the **Settings** icon [1] and click the **Remove** link [2].

Note: If you cannot use the Remove link for an outcome, it may be an imported outcome or an outcome aligned with an assignment or question bank.

Confirm Removal



To confirm you want to remove the outcome, click the **Remove Outcome** button.

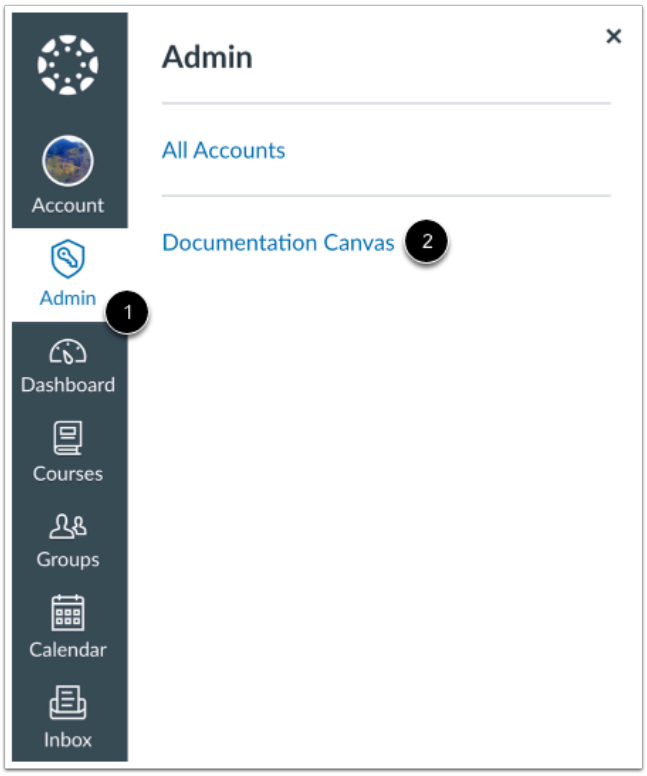
How do I edit or remove an account outcome group in Improved Outcomes Management?

If you created an outcome group in your account that you need to edit or remove, you can do so as long as the outcomes in the group have not yet been used to assess a student. Once an outcome in the group has been aligned with an item or artifact and used for scoring, you cannot modify the outcome group. You can still modify the details of the outcome group.

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

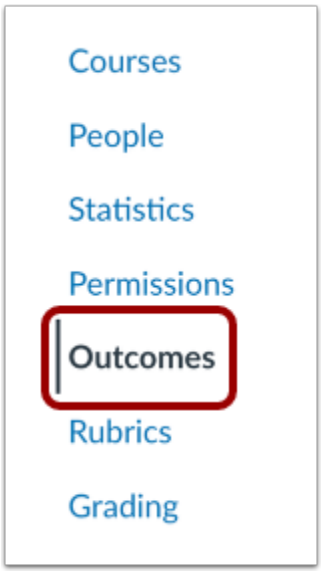
This lesson displays how to edit or remove outcome groups in an account that has enabled the Improved Outcomes Management feature option. If the Outcomes page in your account displays differently than the images in this lesson, learn how to edit or remove outcome groups in the classic Outcomes page view.

Open Account



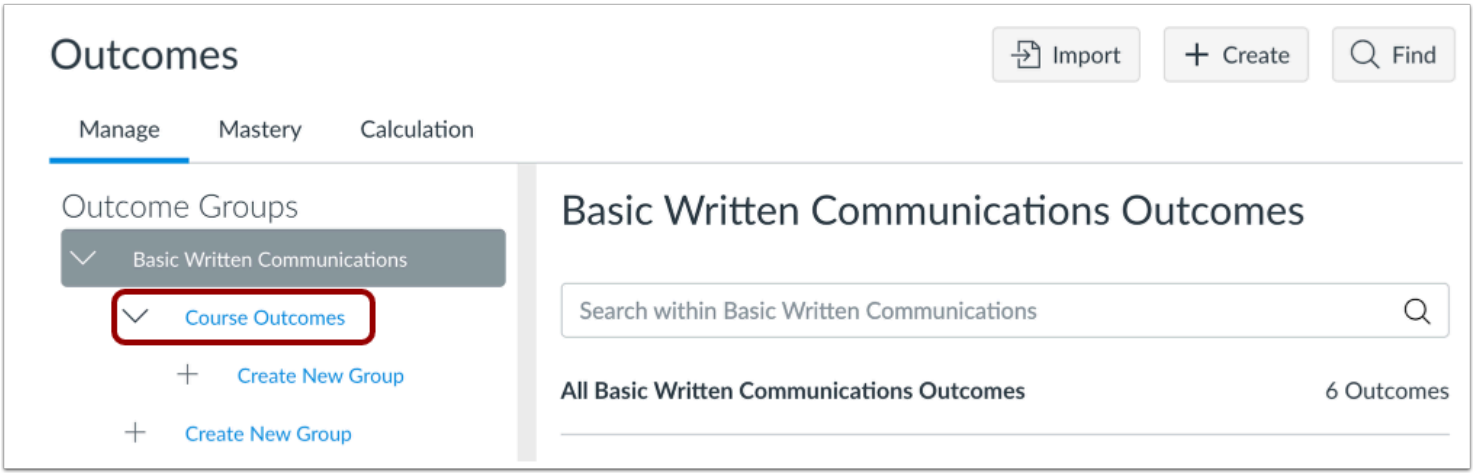
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



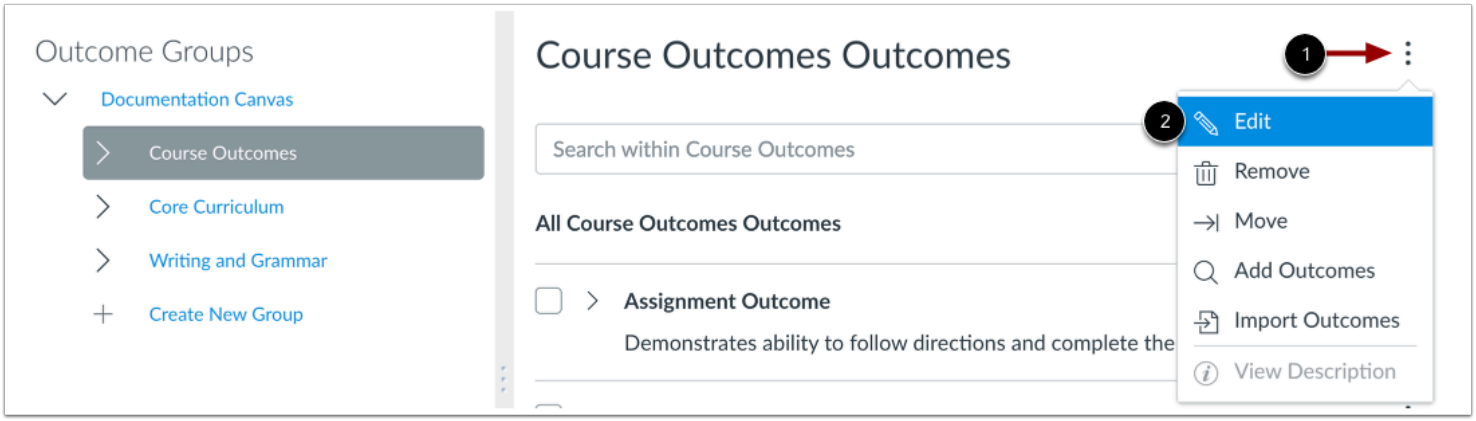
In Account Navigation, click the **Outcomes** link.

Select Outcome Group



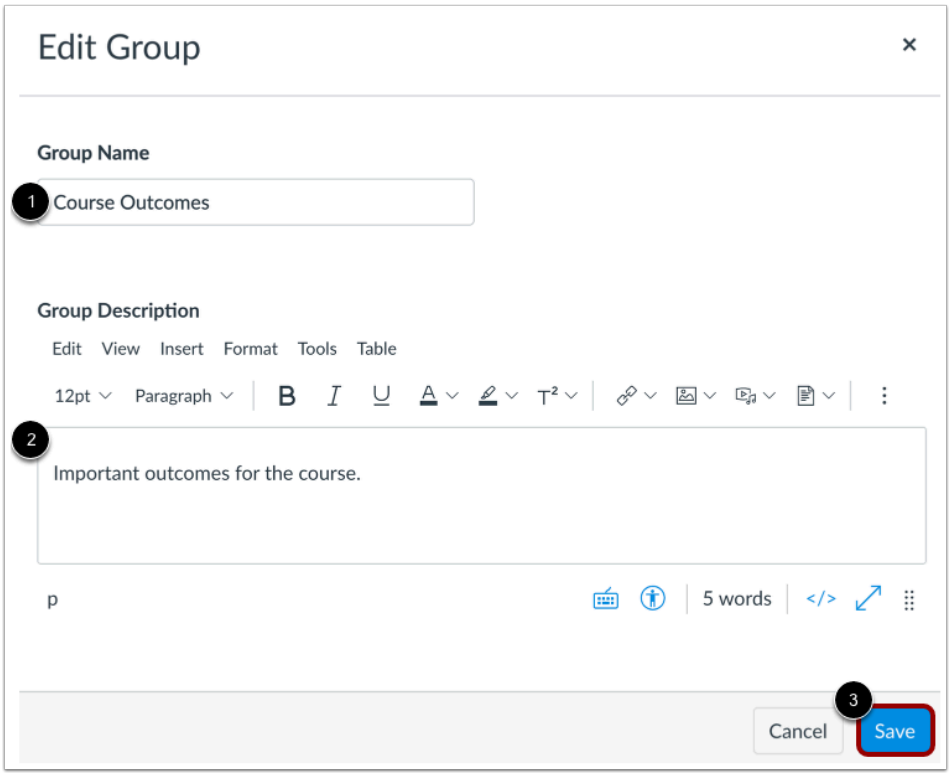
Click the name of the outcome group you want to modify.

Edit Outcome Group



To edit the outcome group, click the **Options** icon [1] and click the **Edit** link [2].

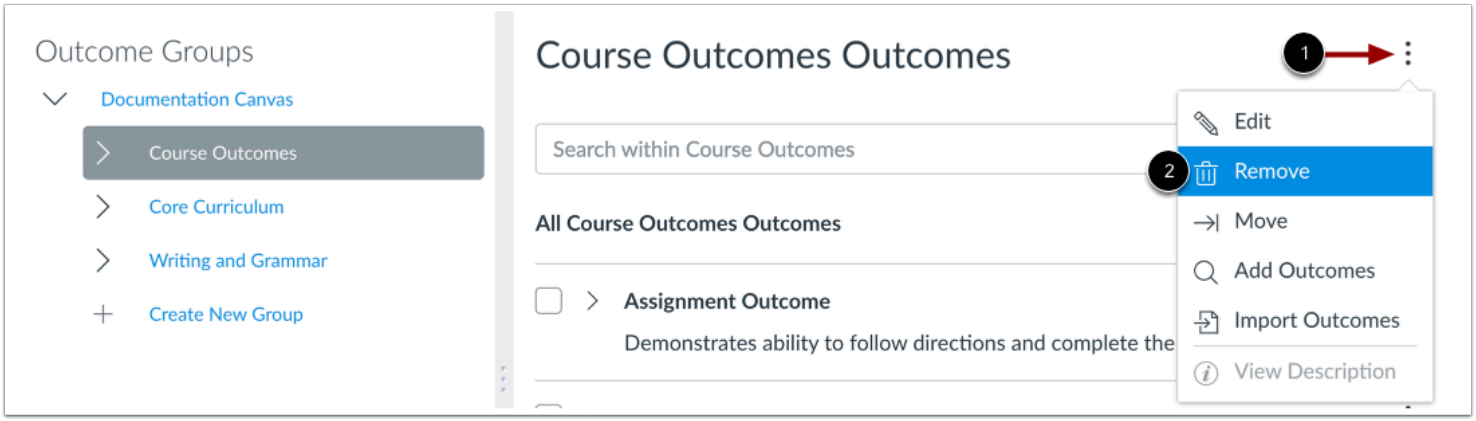
Edit Group Details



You can edit the name [1] and description [2] for the outcome group.

To save your changes, click the **Save** button [3].

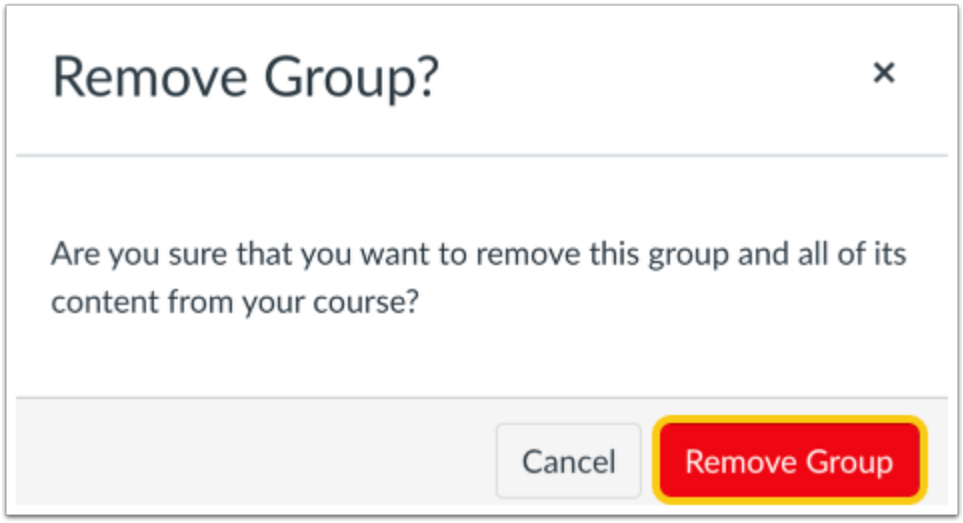
Remove Outcome Group



To remove an outcome group, click the **Options** icon [1] and click the **Remove** link [2].

Note: Removing an outcome group will also remove all outcomes in that group from your account and any courses that imported the outcome group.

Confirm Removal



To confirm you want to remove the group, click the **Remove Group** button.

How do I move account outcomes and outcome groups in Improved Outcomes Management?

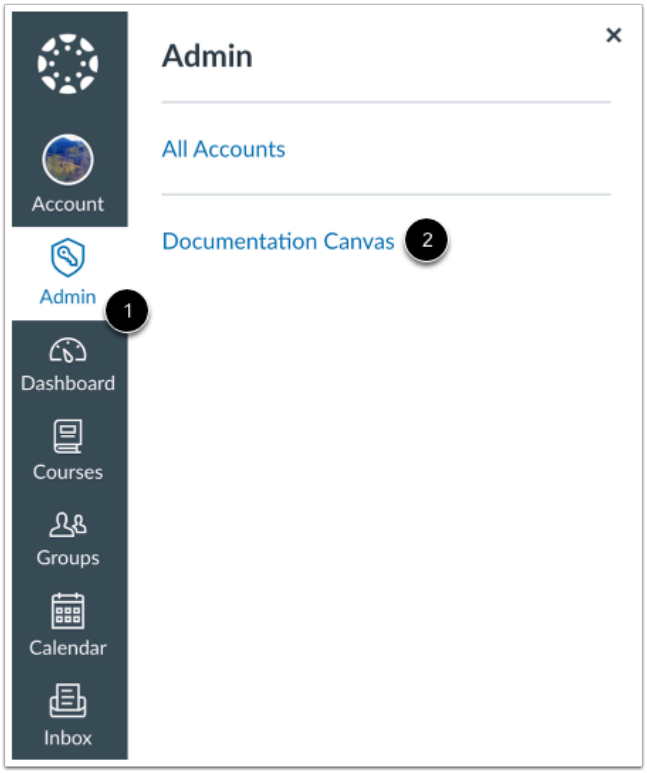
You can move outcomes and outcome groups from the account Outcomes page. When moving an outcome group, you move the group within another outcome group. When moving outcomes, you can move multiple outcomes at the same time.

This lesson displays how to move outcomes and outcome groups in an account that has enabled the Improved Outcomes Management feature option. If the Outcomes page in your account displays differently than the images in this lesson, learn how to move outcomes and outcome groups in the classic Outcomes page view.

Notes:

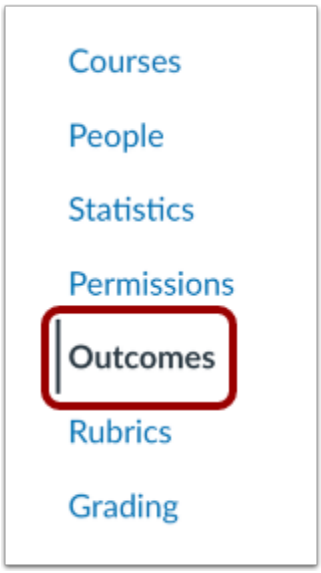
- To move account outcomes and outcome groups into another account or course, you can run and download the Outcome Export account report as a CSV file. Then, import the CSV file into a course or into another account.
- You can also move course outcomes and outcome groups.

Open Account



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

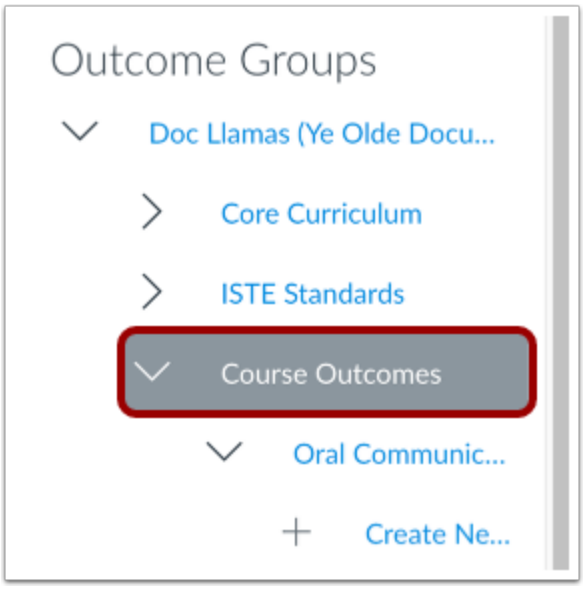
Open Outcomes



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

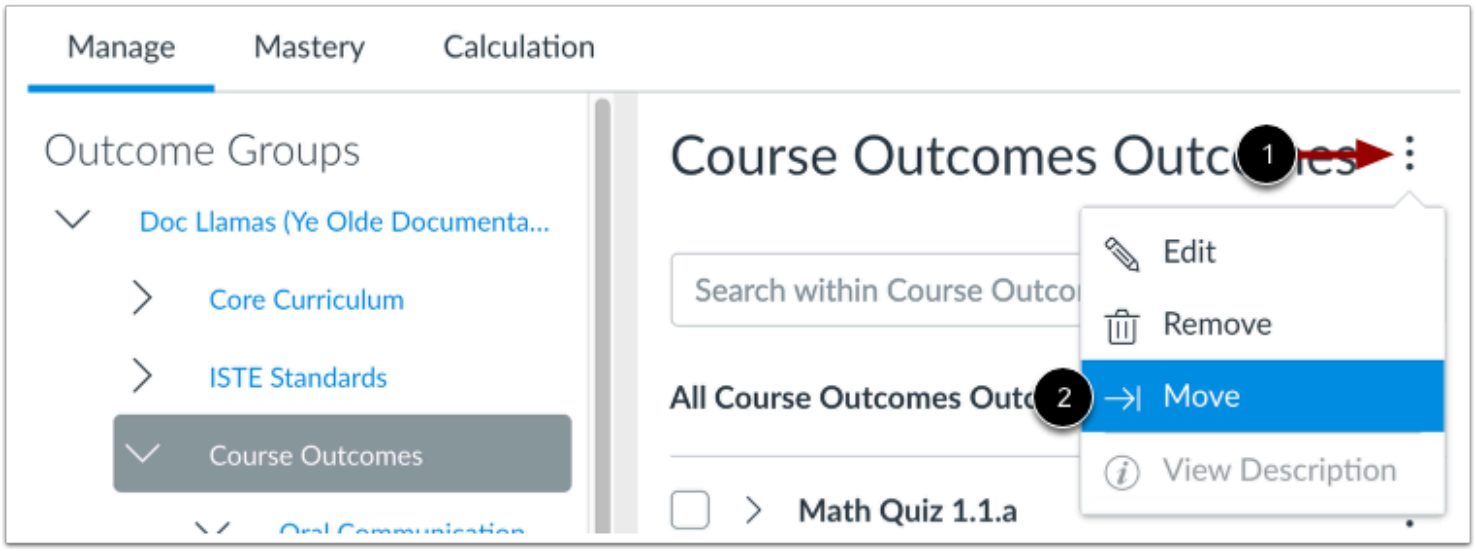
Move Outcome Group

Select Outcome Group



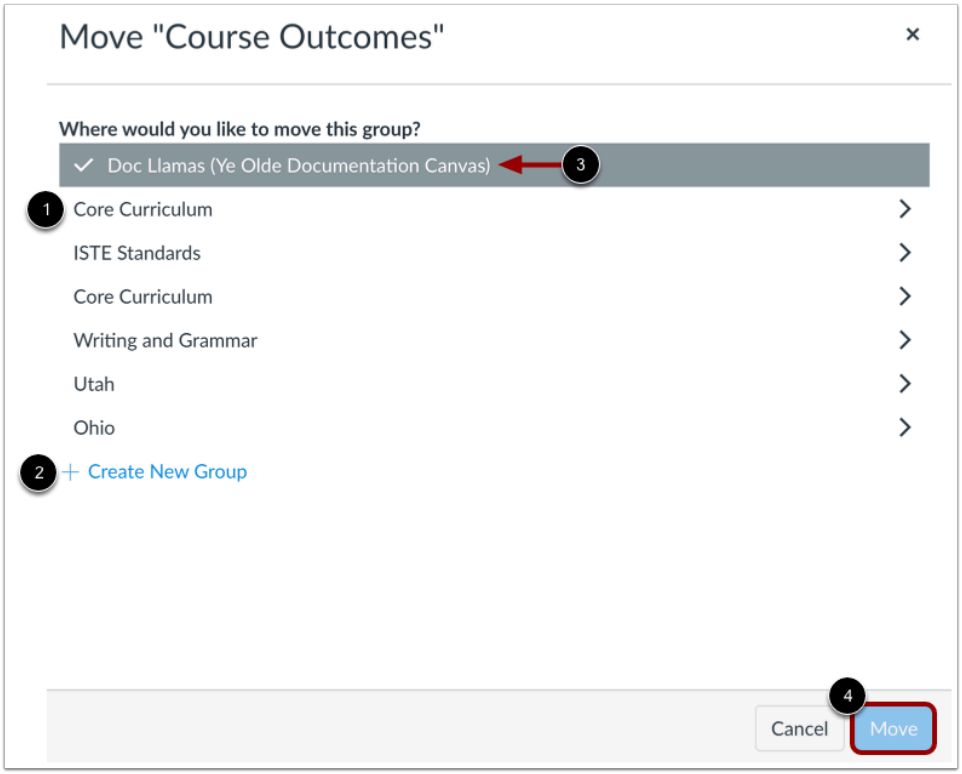
To move an outcome group, click the name of the group.

Open Move Window



Click the **Options** icon [1]. Then click the **Move** link [2].

Move Outcome Group



You can move the outcome group so it is organized within another outcome group.

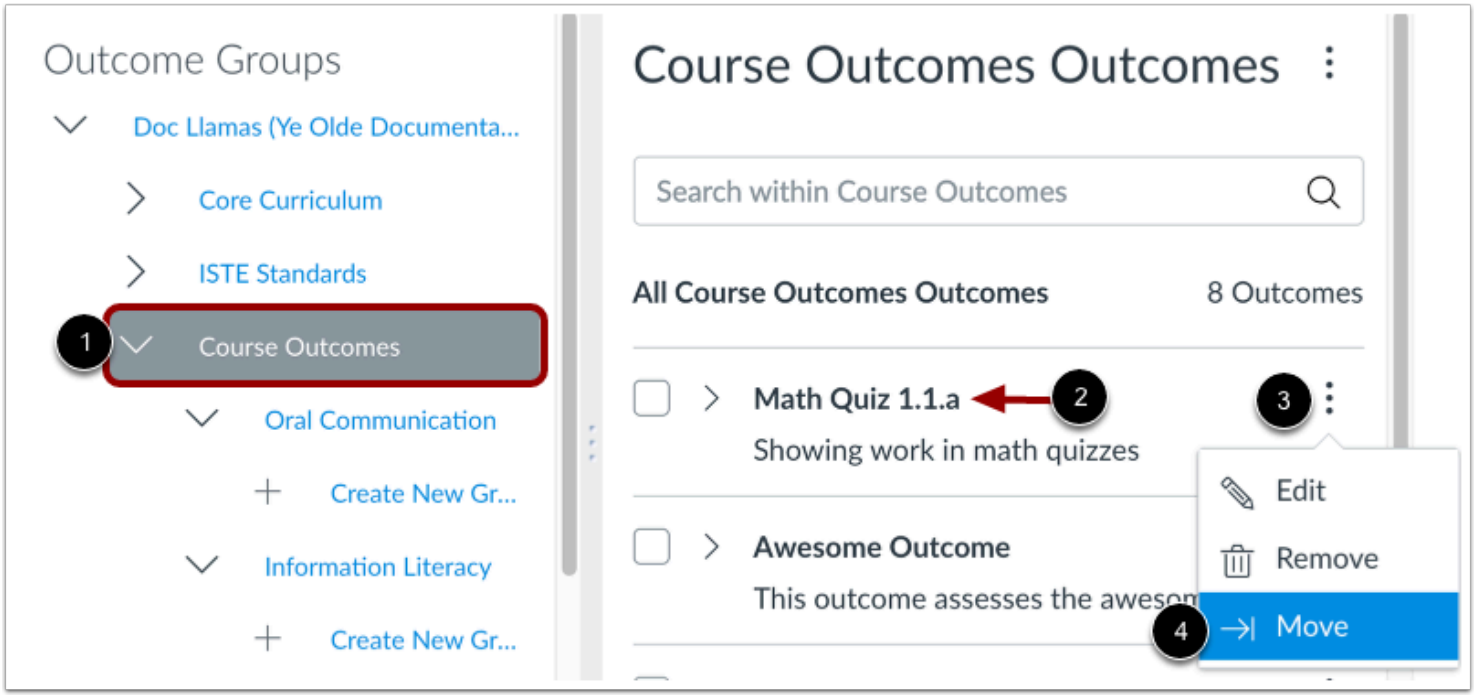
To select the outcome group where you want to move your outcome group, click the name of the group [1]. To create a new outcome group to move your existing outcome group, click the **Create New Group** link [2].

If your outcome group is already organized within another outcome group, you can move your group to the account level by clicking the name of the account [3].

To move your outcome group, click the **Move** button [4].

Move Outcome

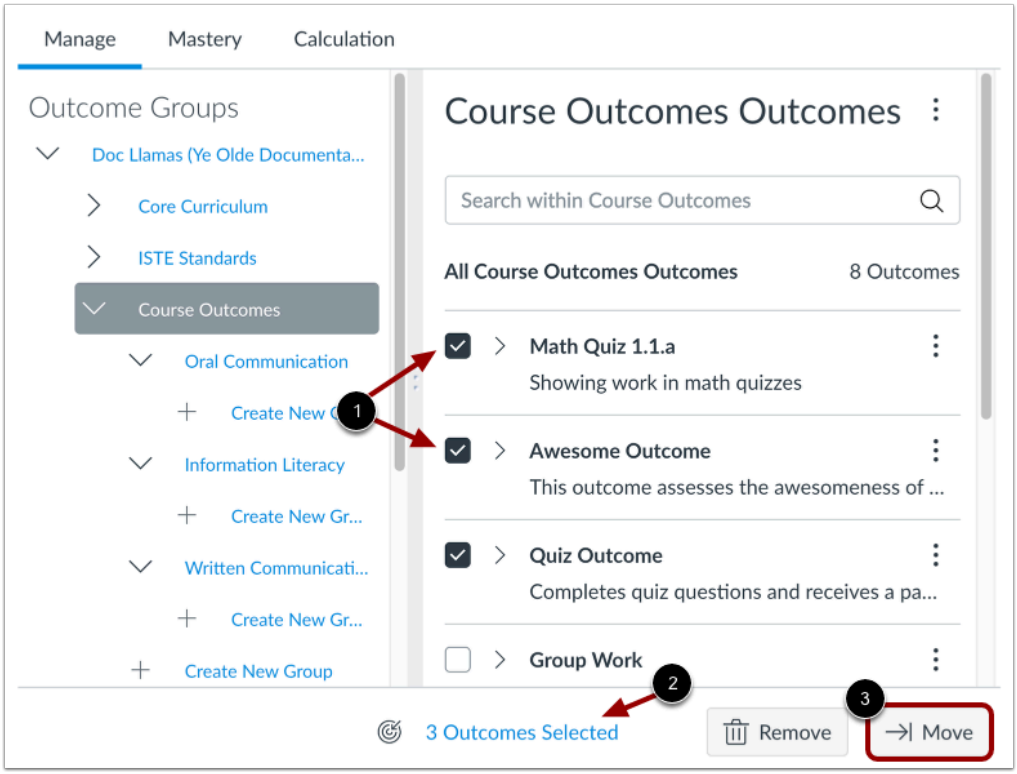
Select Outcome



To move an outcome, click the outcome group where the outcome belongs [1]. Then find the outcome you want to move [2].

Click the **Options** icon for the outcome [3]. Then click the **Move** link [4].

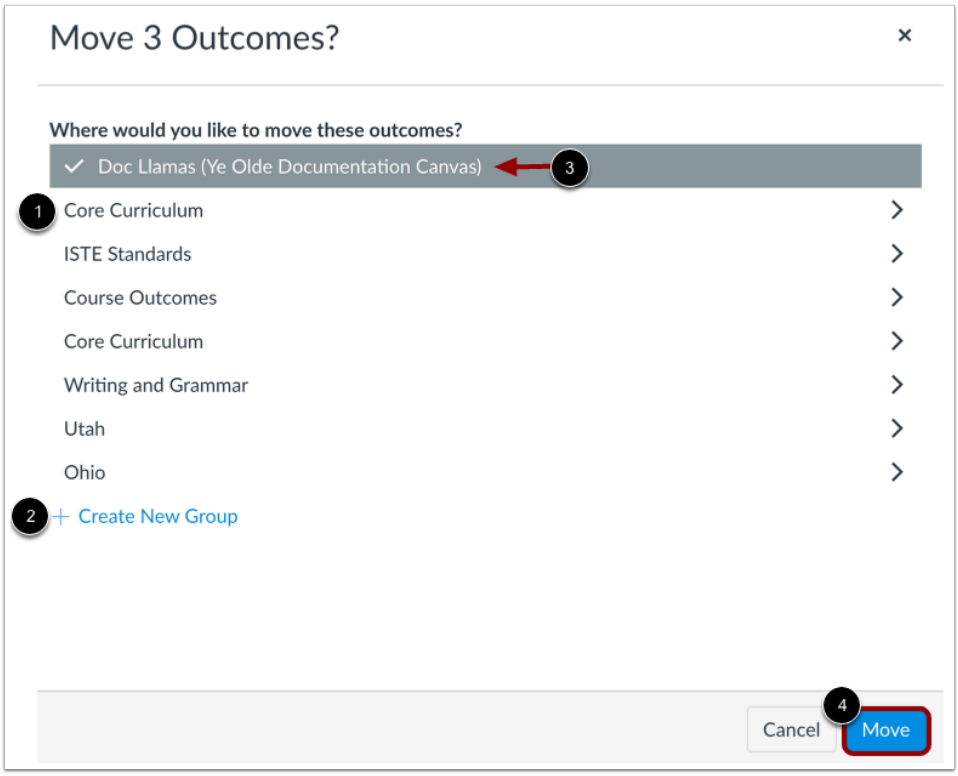
Move Outcome or Outcome Group



To move multiple outcomes, click the checkboxes next to the outcomes you want to move [1].

The Outcomes page displays the number of outcomes you have selected. To view the names of the selected outcomes, click the **# Outcomes Selected** link [2]. You can select outcomes from multiple outcome groups without losing previously selected outcomes.

To move your selected outcomes, click the **Move** button [3].



You can move outcomes so they are organized within an outcome group.

To select the outcome group where you want to move your outcome(s), click the name of the group [1]. To create a new outcome group to move your existing outcome group, click the **Create New Group** link [2].

If your outcomes are already organized within an outcome group, you can move outcomes to the account level by clicking the name of the account [3].

To move your outcome(s), click the **Move** button [4].

How do I find an existing outcome to add to an account in Improved Outcomes Management?

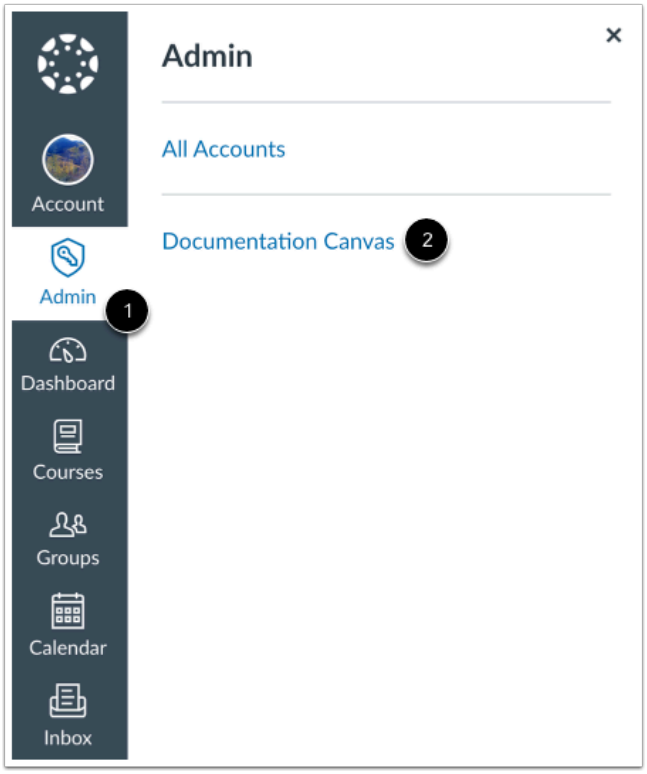
You can import an individual outcome or multiple outcomes that are available to import for your institution.

Learning Standards imported to the account or sub-account levels can be found within the Account Standards outcome group. Depending on what is available to your institution, the following learning standards may be available:

- Common Core Standards are available for Language Arts, Math, and Science (NGSS)
- State-specific standards are available for Language Arts, Math, Science, and Social Studies (if imported by your institution)
- ISTE Standards for Coaches, Computer Science Educators, Students, Teachers, and Administrators

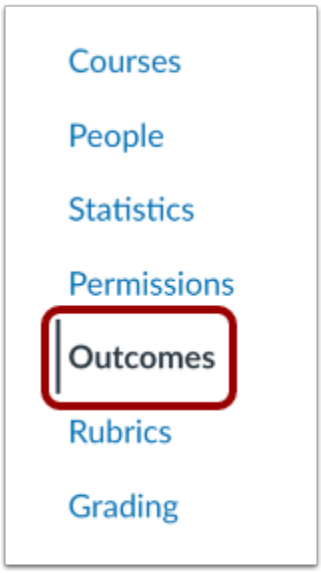
This lesson displays how to find outcomes in a course within an account that has enabled the Improved Outcomes Management feature option. If the Outcomes page in your course displays differently than the images in this lesson, learn how to find outcomes in the classic Outcomes page view.

Open Account



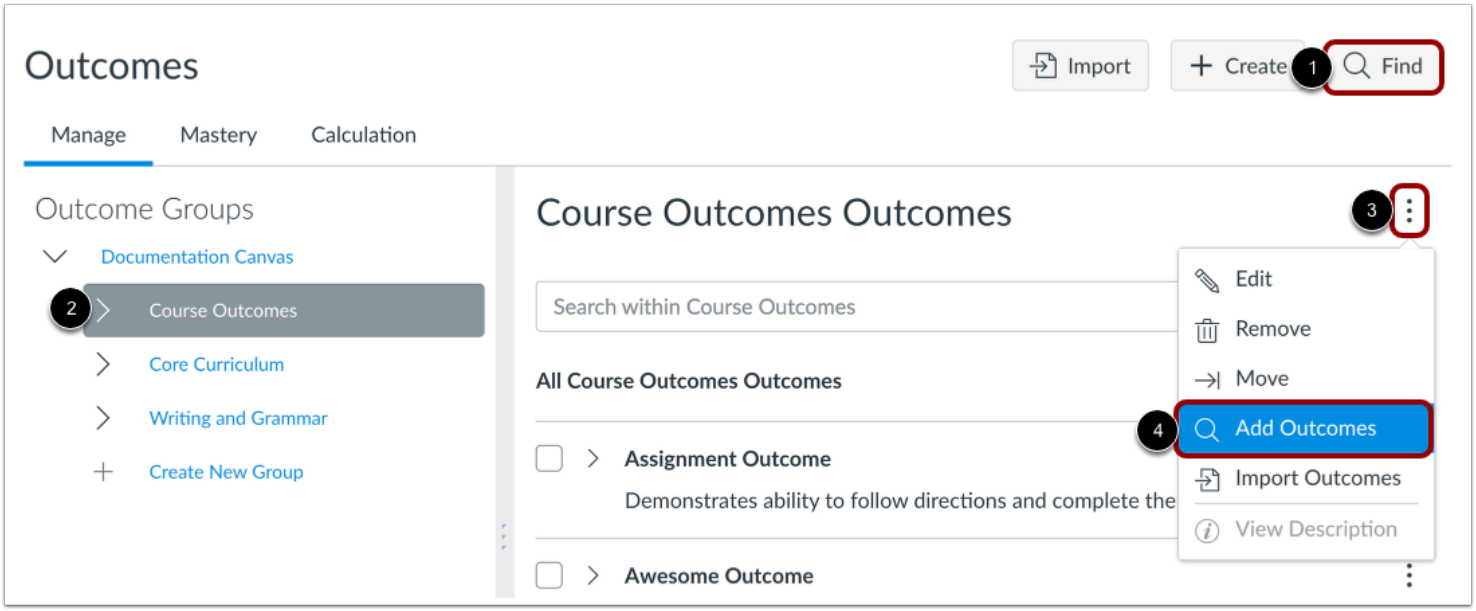
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



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

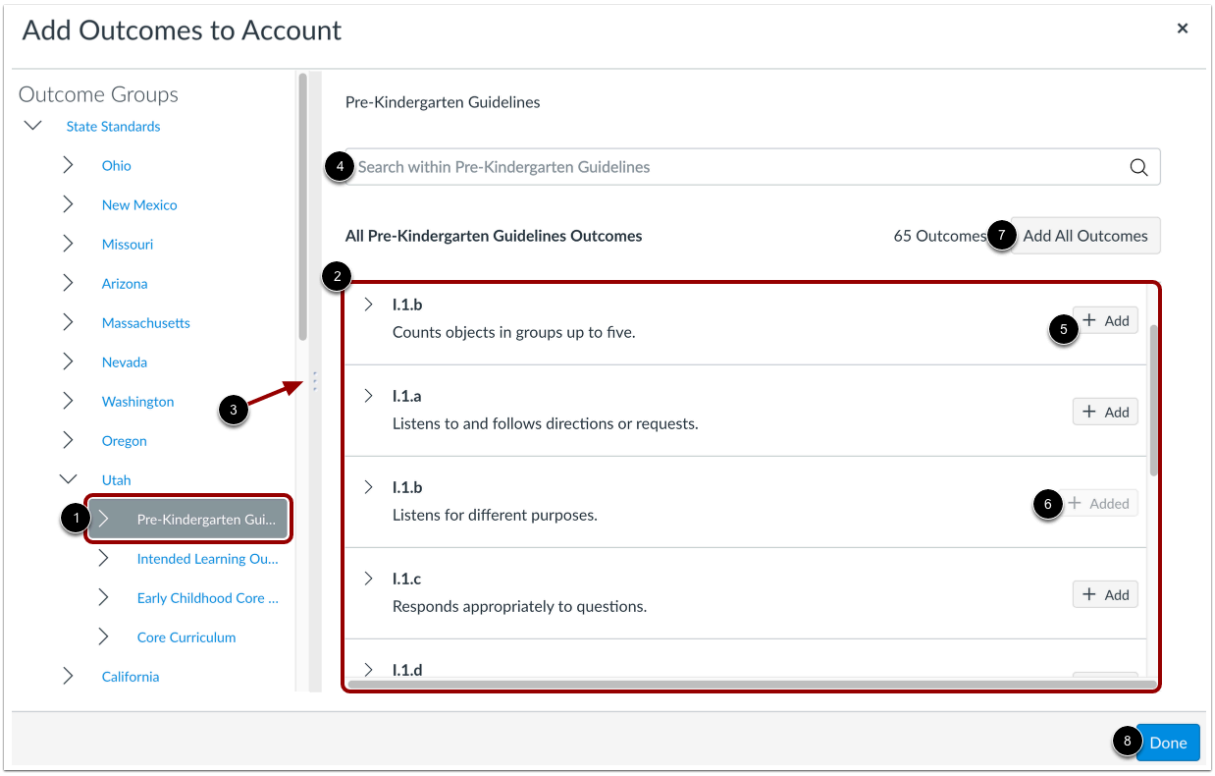
Find Outcomes



To find and add an Outcome at the root level course outcome group, click the **Find** button [1].

To find and add an Outcome in a specific outcomes group, select an outcome group [2]. In the outcome group, click the **Options** icon [3], then select the **Add Outcomes** option [4].

Add Outcomes



Click the name of an outcome group [1].

View the outcome for the outcome group [2]. You can adjust the size of the Outcome Group and Outcome windows by clicking and dragging the divider bar [3].

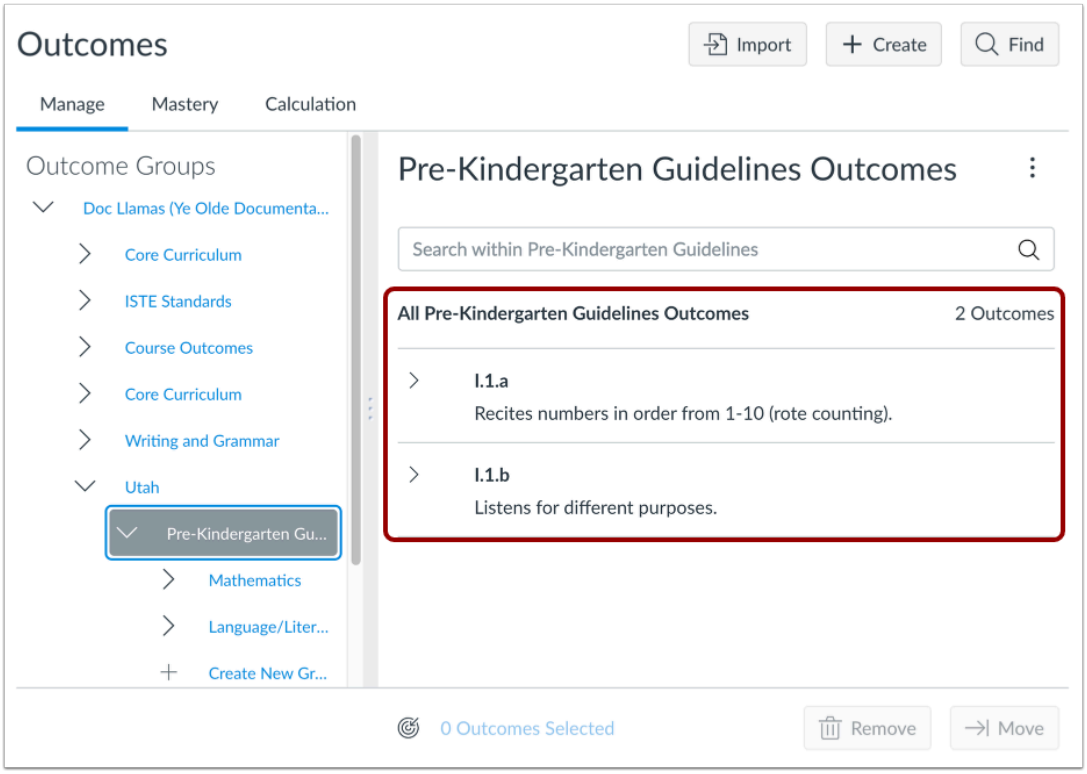
To locate a specific outcome, you can enter the outcome name in the **Search** field [4].

When you have located an outcome, click the **Add** button for that outcome [5]. When an outcome has been added, the outcome displays an **Added** label [6].

To add all outcomes in a group, click the **Add All Outcomes** button [7].

To return to the account Outcomes page, click the **Done** button [8].

View Outcome



View the imported outcomes.

Outcomes are imported to either the main account outcome level or the selected outcome group. Learn how to move outcomes or outcome groups.

People

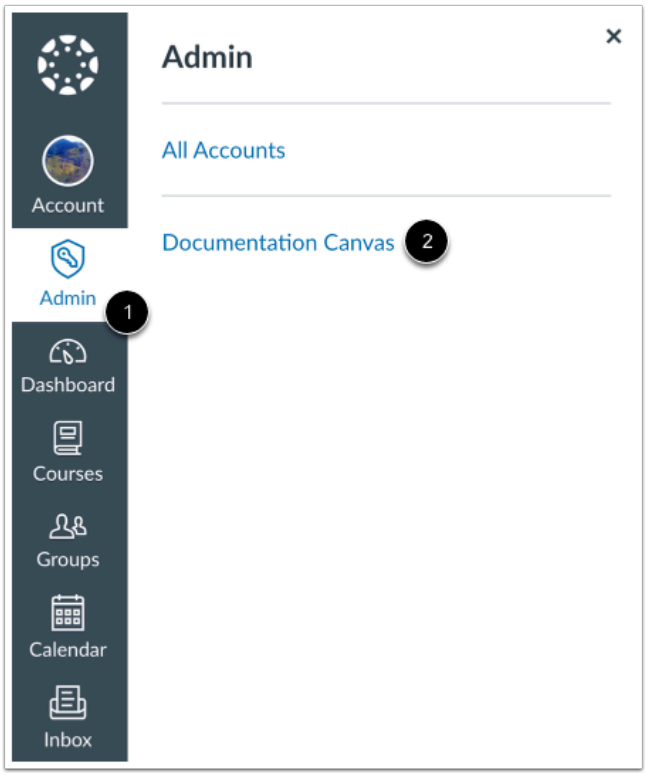
How do I use the People page in an account?

In the People page, you can view all users in your account, filter users by course role, or search for users individually. You can also sort search result columns in ascending or descending order.

For all users, you can manage and create account groups, manage profile pictures, and view user profiles.

Note: If enabled for your institution, you may see options to manage temporary enrollments on the People page.

Open Account



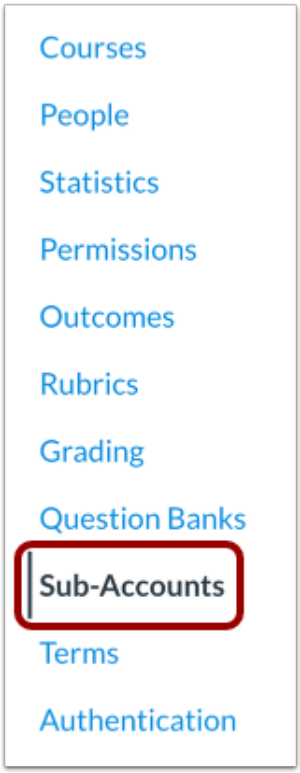
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



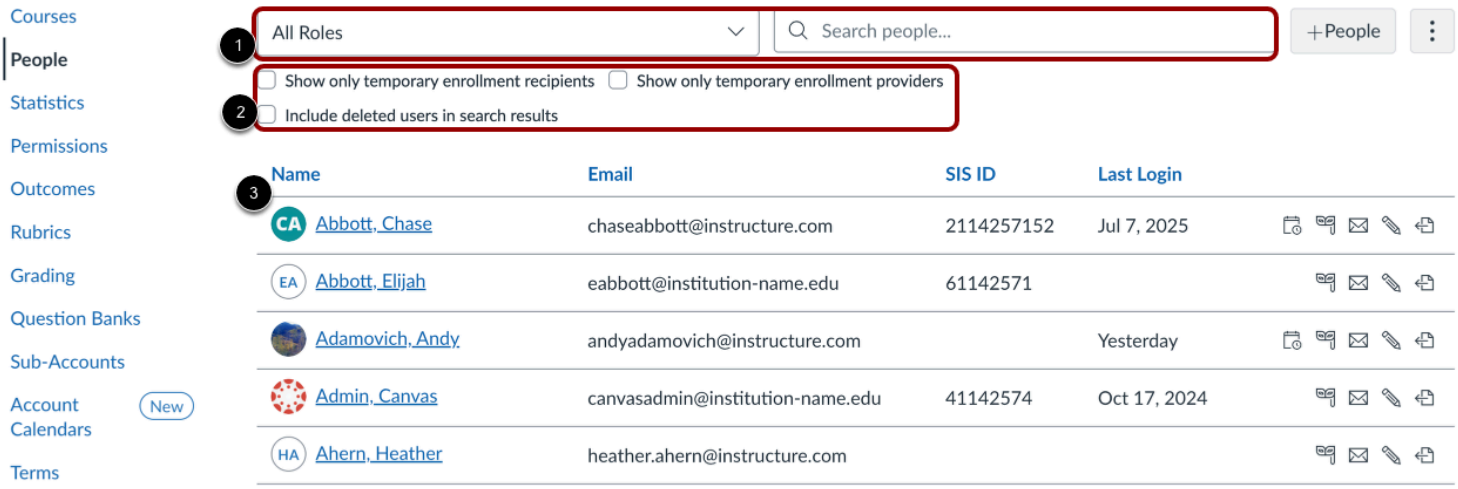
In Account Navigation, click the **People** link.

View People in Sub-Accounts



If you have organized courses in your account by sub-accounts and those courses include enrollments, click the **Sub-Accounts** link to locate and open the sub-account, then click the sub-account's **People** link.

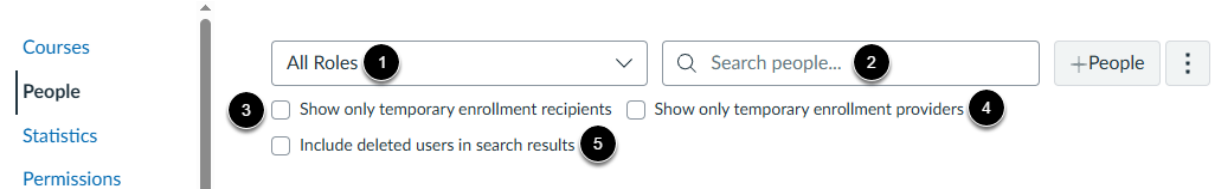
View People



The **People** page displays all users in the account along with relevant details such as name, email, SIS ID, and last login. The page includes global filters and search tools at the top [1], optional filter checkboxes for temporary or deleted users [2], and a list of matching user records [3].

All elements on the page are responsive and adjust based on the browser window width to ensure visibility of user data.

Search and Filter Users



The **People** page allows you to search for and filter users in the account using a set of global tools:

All Roles [1]: select a course role to filter users by role. By default, all roles are shown. Admin roles are not included in this menu.

Search Field [2]: enter a user's name, email, SIS ID, login ID, or Canvas user ID to search. If you have the **SIS Data - Manage** and **SIS Data - Read** permissions, you can also search by Integration ID.

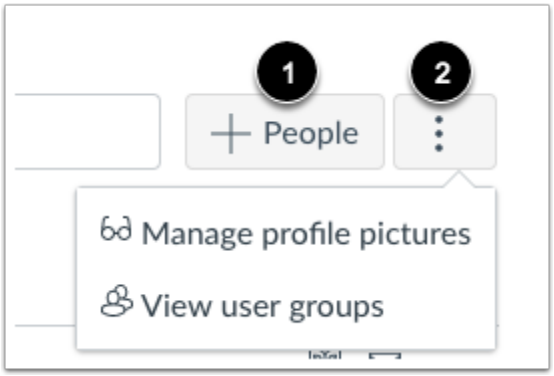
Show only temporary enrollment recipients [3]: check this box to filter for users with temporary enrollment as recipients.

Show only temporary enrollment providers [4]: Check this box to filter for users with temporary enrollment as providers.

Include deleted users in search results [5]: enable this option to include deleted users in your search results.

All filters and search tools update the user list dynamically. The display adapts to your browser's width to ensure all user data remains visible.

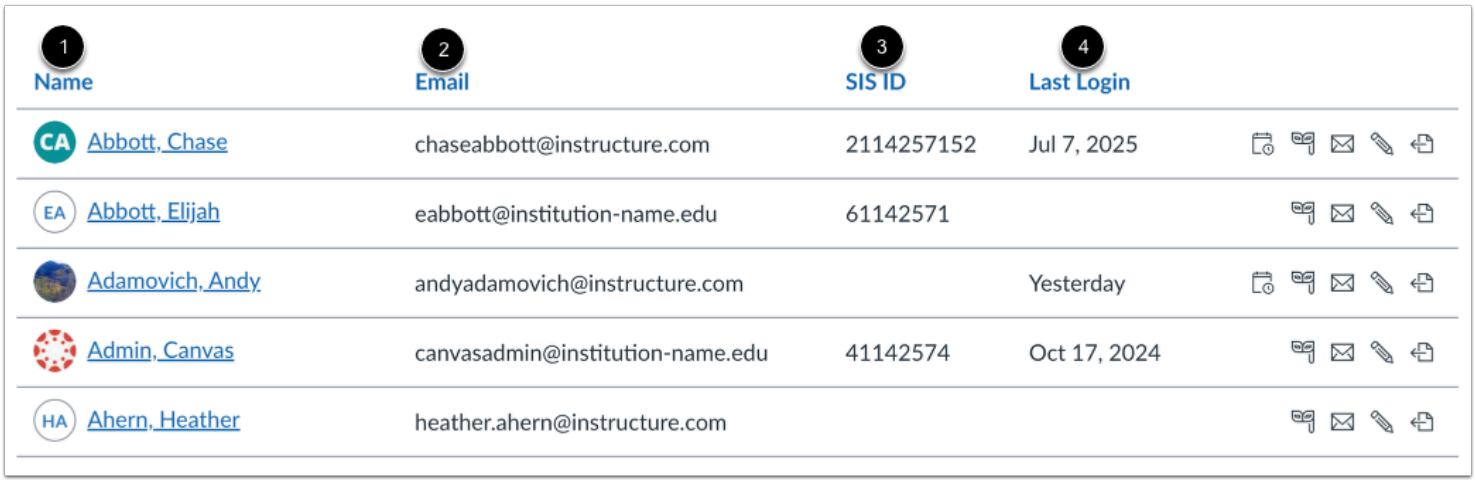
Manage Users



To add a user to the account, click the **Add People** button [1]. The Add People button only displays if you have permission to manage enrollments.

To manage account-level user options, click the **Options** menu [2]. If you have appropriate permissions, you can manage profile pictures and view user groups.

View Users



The People page paginates filter and search results in sets of 15 users and are ordered alphabetically by last name. Each paginated page displays in a table format but columns are responsive according to the widest column for that page.

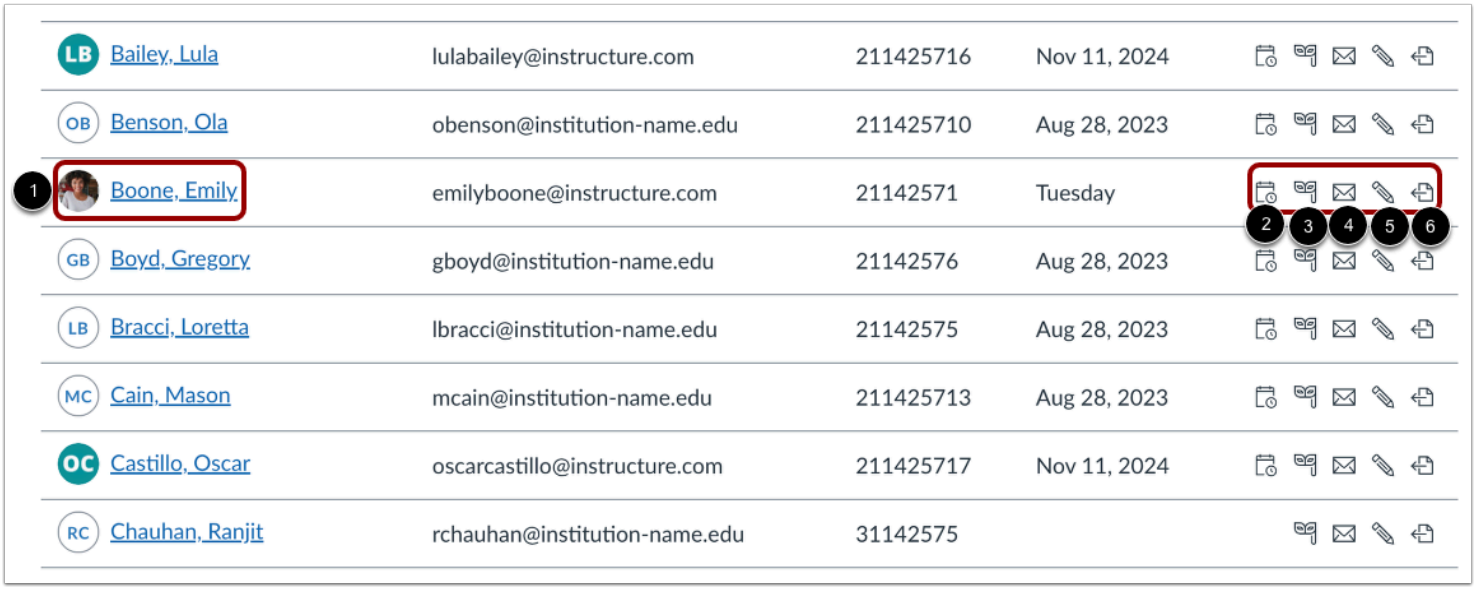
Results display the user's name and profile picture [1], email address [2], SIS ID (if applicable) [3], and last login date and time [4]. A login on the current date displays the time only.

Each column heading can be sorted in ascending or descending order.

Notes:

- Viewing user email addresses is an account permission. Depending on your permissions, you may not be able to view a user's email address.
- If profile pictures are not available or a user has not yet set a profile picture, the user's initials will display in place of a profile picture.

Manage User

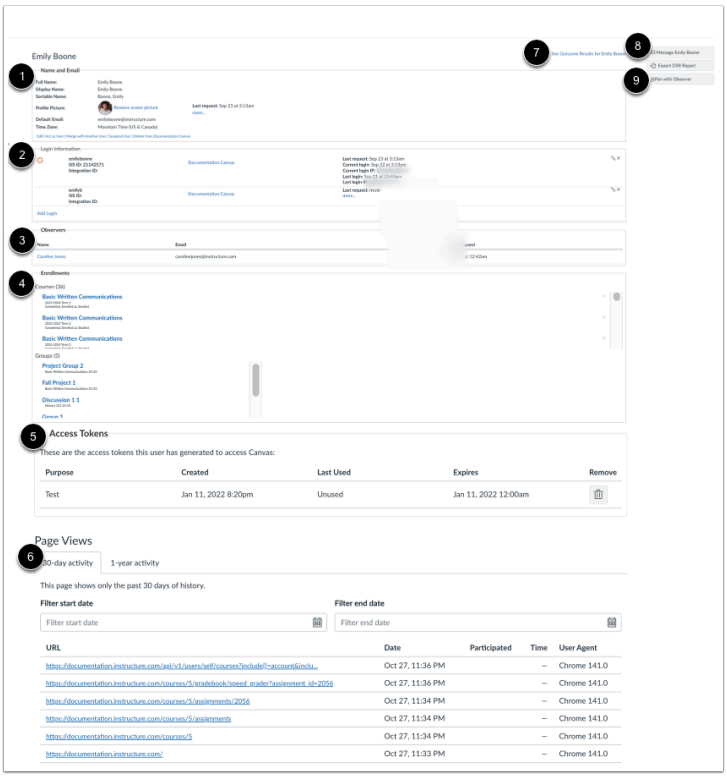


To open a user's profile, click the name of the user [1].

If enabled for you institution, you can create a temporary enrollment [2]. You can also act as the user [3], send a message from the Conversations Inbox [4], edit user details [5], and Export DSR Request [6].

Note: On the Account-level People page, Root-account admins can export a human-readable Data Subject Request (DSR) report for a single user following General Data Protection Regulation (GDPR) guidelines.

View User Profile



The student profile displays information organized into several sections:

- **Name and Email** [1]: Shows the student's full name, display name, sortable name, profile picture, default email address, and time zone. Admins can also edit the user's profile details, act as the user, merge the user's account, and delete the user from the account.
- **Login Information** [2]: Displays the student's login credentials, SIS ID, and associated account. If permitted, you can manually manage login information to edit the login information or add an additional login and password.
  - **Last Request**: Shows the most recent time a user viewed content or took action in a course. This also includes any automatic pings sent while the course page is open in the browser, even if the user did not actively interact with the page.
  - **Current Login**: Shows the date and time of the users most recent login session (the login they are currently using or just completed)
  - **Last Login**: Shows the date and time of the users previous login, before their current session.
- **Observers** [3]: Lists any observers linked to the student, including the observer's name, email, and the time of their most recent request.

- **Enrollments** [4]: Shows all course enrollments for the student, including course titles, terms, enrollment statuses (e.g., active or completed), and roles.
- **Access Tokens** [5]: If available, displays user-generated access tokens.
- **Page Views** [6]: Displays recent page views for the student. This data can be filtered by date and downloaded as a CSV file.
- **See Outcome Results** [7]: If available, allows viewing the student's outcome results.
- **Message** [8]: Opens a window to send a direct message to the student.
- **Pair with Observer** [9]: Allows pairing the student with an observer.

How do I create and add users to an account?

You can add new users to your account. Users can only be added at the account level. Only root account admins can add users to an account.

If you use SIS Imports, you do not need to add any users to your account, as they can be added through your student information system (SIS).

Account Invitations

When a user account is manually added, Canvas gives an option to generate an account invitation. If this invitation is sent, the user is invited to complete the registration process by creating a password. Once the user has an account, the user can also be added to a course. If a user is invited to a course without having an account, the user will have to create an account before accepting the course invitation.

When users are invited to a course manually, they can view the course invitation link in their email and click it to view a preview of the Canvas course. To officially accept, they must click an Accept button in the Canvas interface. However, if you prefer to disable course previews and have users automatically join the course when they view the Canvas course, please contact your Customer Success Manager to disable invitation previews.

Email Addresses

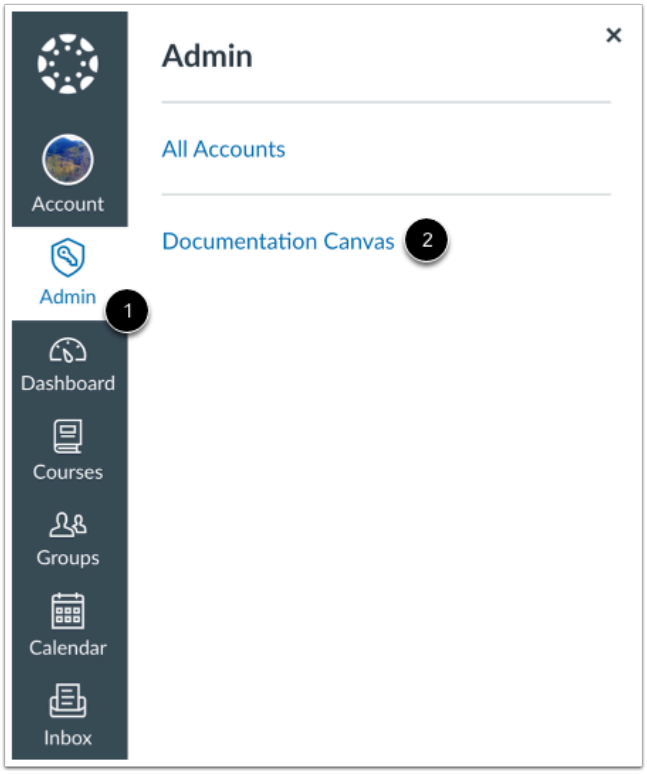
Canvas identifies users by email address. When students are added to a course, Canvas attempts to reconcile any email address conflicts when the user first logs in to the course:

- If the user does not have a username in the course's root account, the user's email address is linked to another user within the account, or the institution does not use delegated authentication if open registration is enabled, an account will be created for the user. Adding an email address that is not already linked to an account will only work if Open Registration is enabled.
- If the email address is already associated with an account, the student will be asked to log in to Canvas using his or her existing email address.
- Sometimes a student may be using multiple email addresses within Canvas. If a student responds to an account invitation at one email address, but is logged in to Canvas using a different email address, the student will be asked if they want to link both addresses to the same account.

Notes:

- You can also add a user to a sub account by adding them to a course associated with the sub account.
- If enabled for your institution, you can create temporary enrollments. Temporary enrollments allows you to give a user access to another user's courses for a specific time frame.

Open Account



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

Open People



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

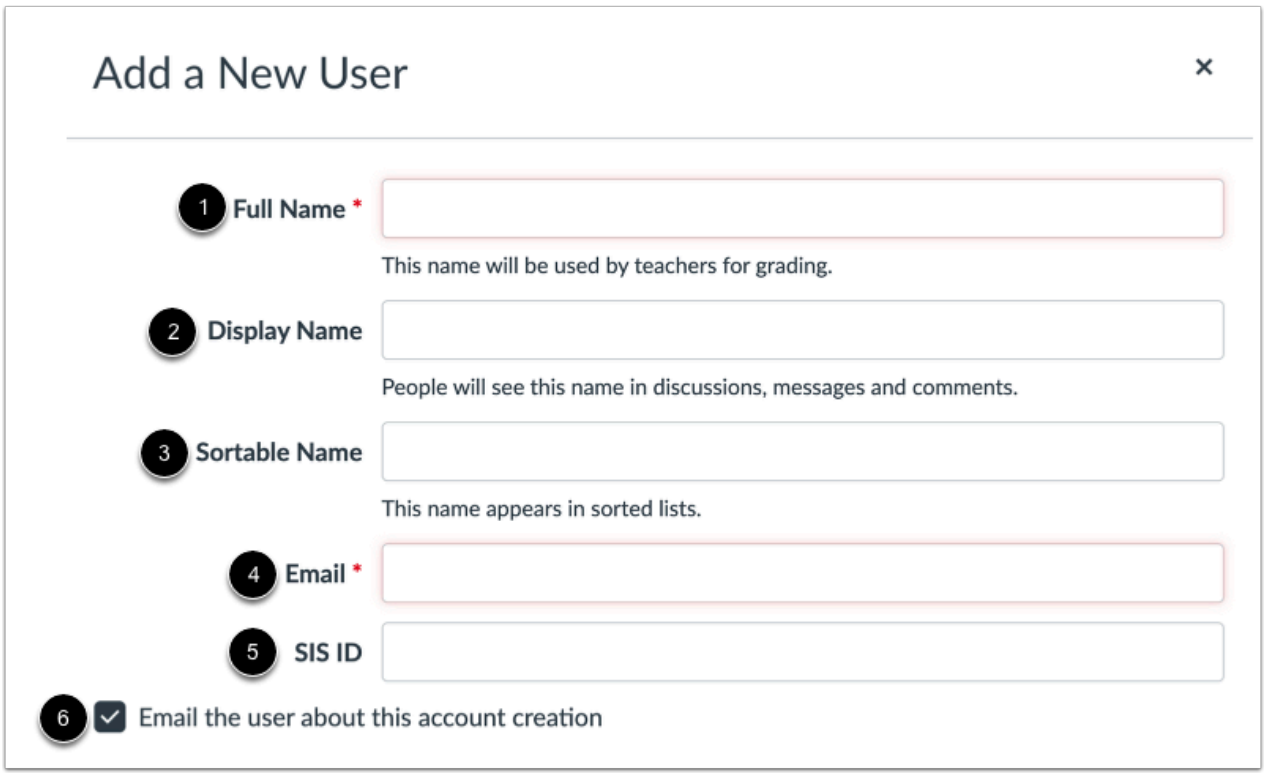
Add User



Click the **Add People** button.

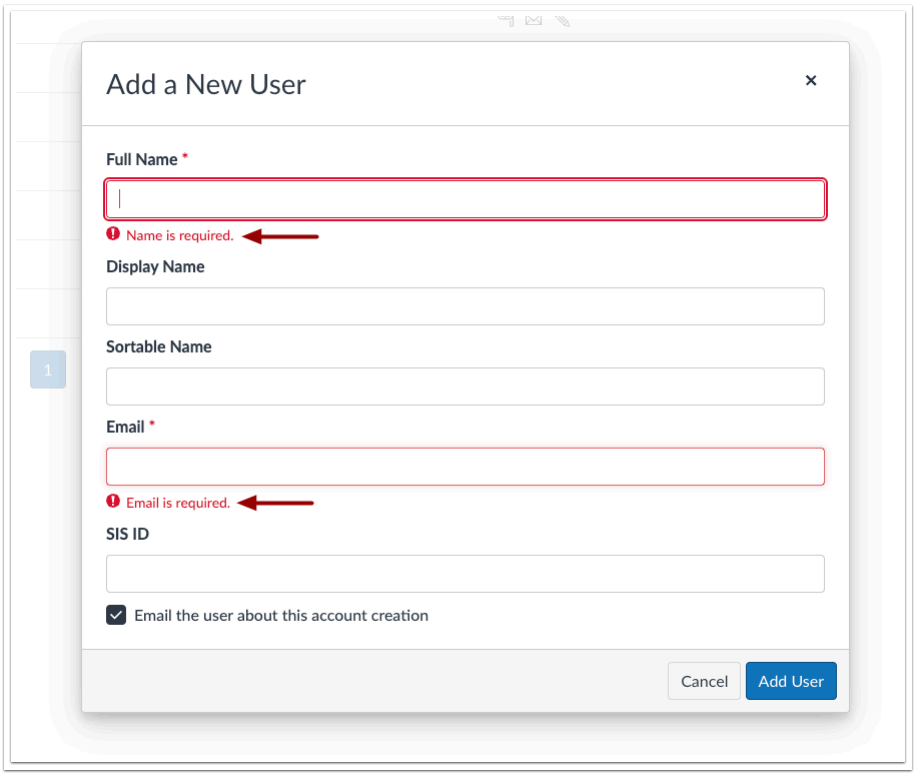
Note: If you have multi-factor authentication enabled, you will be shown the "Login" field upon clicking the button. Canvas supports authentication with a variety of third-party identity providers, which can be configured in the Canvas interface. Each provider requires the admin to set an attribute to be associated with the account, such as a user ID, email, or login.

Add User Details



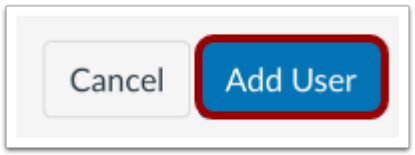
Complete the following fields:

- **Full Name** [1] is used for grading, SIS imports, and other administrative items.
- **Display Name** [2] is the what other users will see in discussions, announcements, etc. The user can set his or her own display name if the setting is enabled.
- **Sortable Name** [3] is the user's last name, first name default. This name appears in sorted lists and admins can search for it.
- **Email** [4] is used as the user's default email address in Canvas. Emails are used to send course notifications.
- **SIS ID** [5] is the SIS ID of the user. This field is only used for institutions using SIS imports and only displays to you if you have the correct account-level SIS permissions.
- **Email the user about this account creation** [6] is an option to send the user an email about his or her new account. This option is selected by default. If you do not want the user to be notified about the account, deselect this checkbox.



When information is missing from the Full Name and Email fields, an error text displays.

Add User



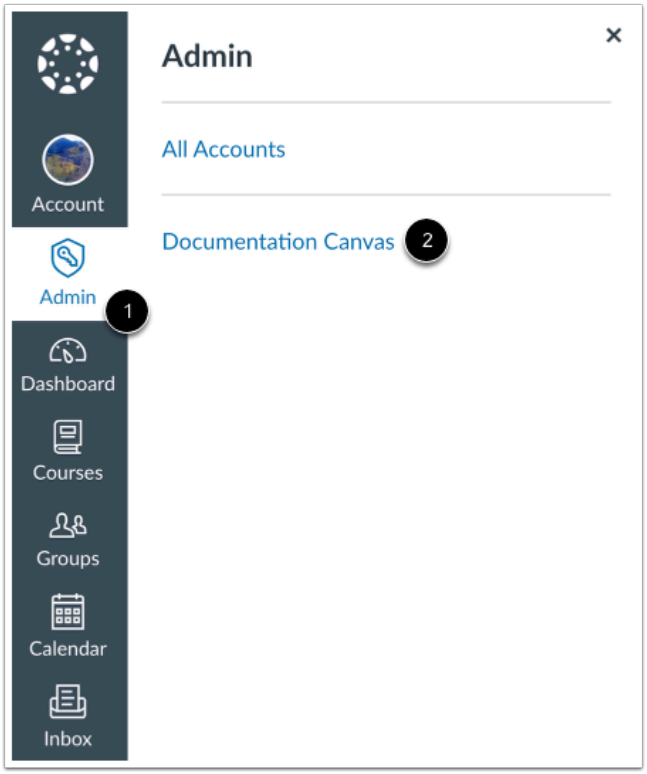
Click the **Add User** button.

How do I edit a user's name, time zone, or email in an account?

You can manually edit a user's details in your account.

Note: If your account manages user information through a student information system (SIS), changes will also have to be made in the SIS. Any changes made in Canvas will not be passed back to the SIS.

Open Account



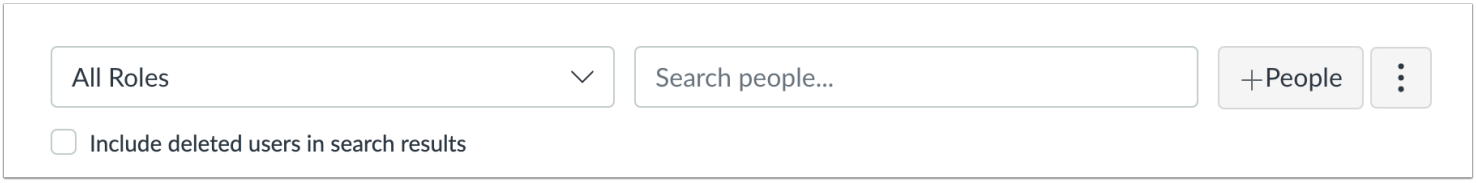
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



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

Find User



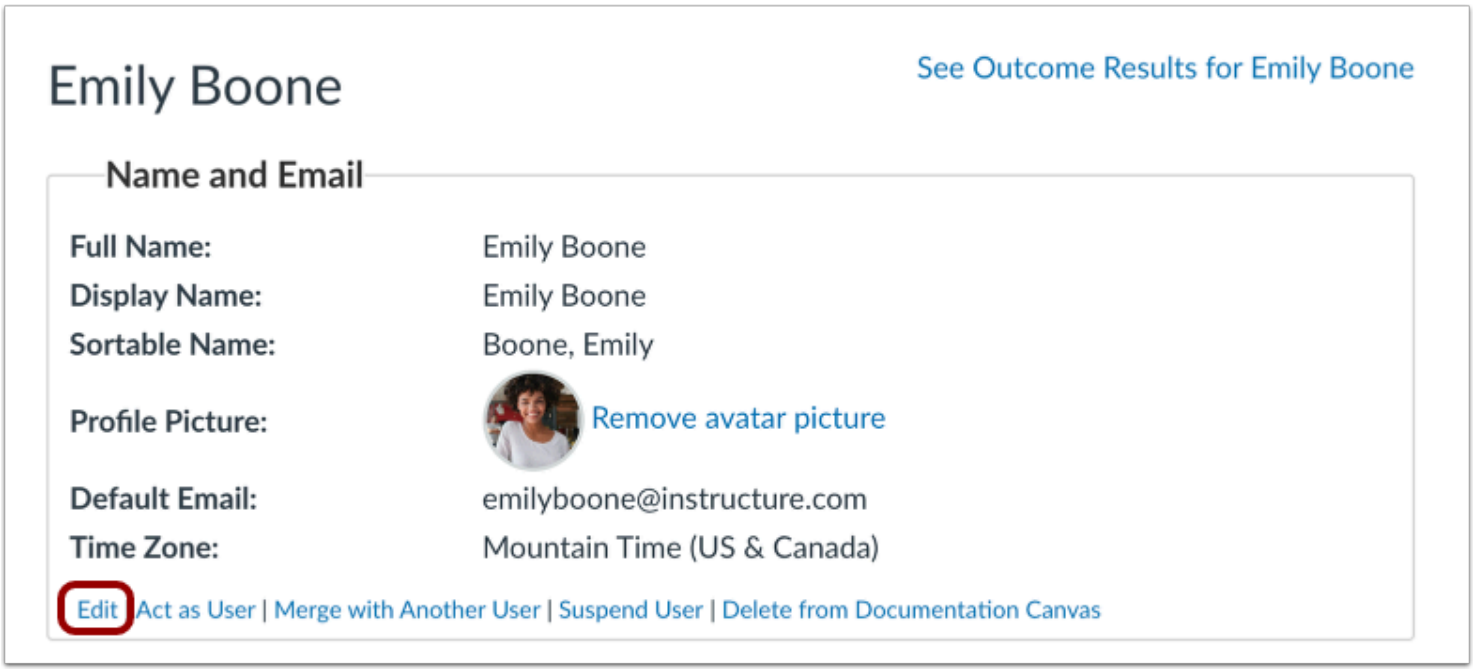
Use the filter and search options to find the user in the account.

Open User Profile



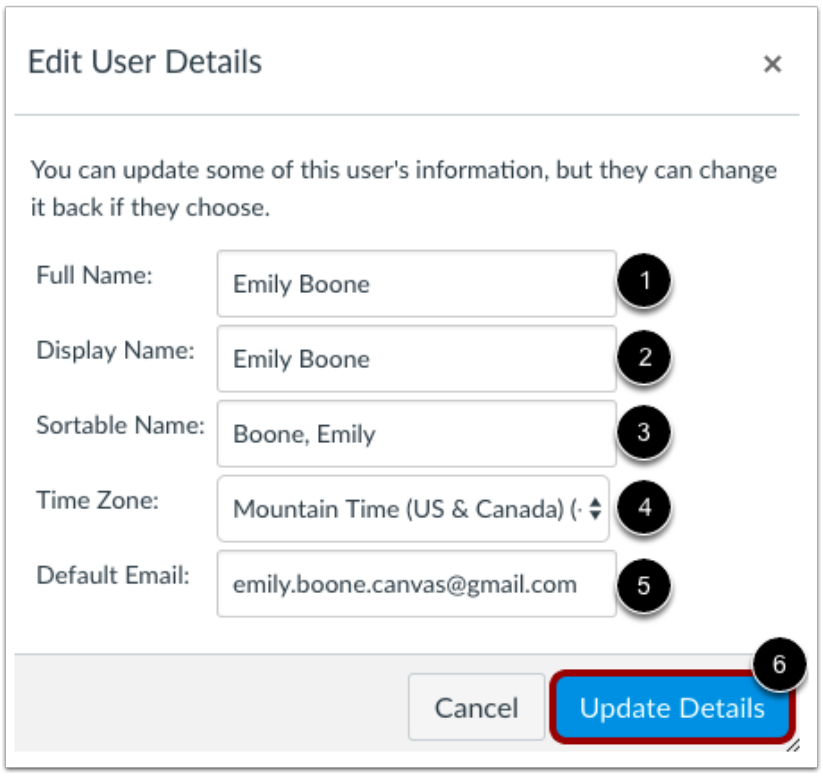
In the search results, click the user's name.

Edit User Details



Click the **Edit** link.

Update 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:

- **Full Name** is used for grading, SIS imports, and other administrative items [1].
- **Display Name** is what other users will see in Announcements, Conversations, Conferences, and Discussions. [2]. The user can set his or her own display name if the setting is enabled.
- **Sortable Name** is the user's last name, first name default and it can be edited [3]. This appears in sorted lists and admins can search for it.
- **Time Zone** can be set to where the user or institution is located [4].
- **Default Email** is the user's contact method [5].

When you are done, click the **Update Details** button [6].

How do I manage a user's login information in an account?

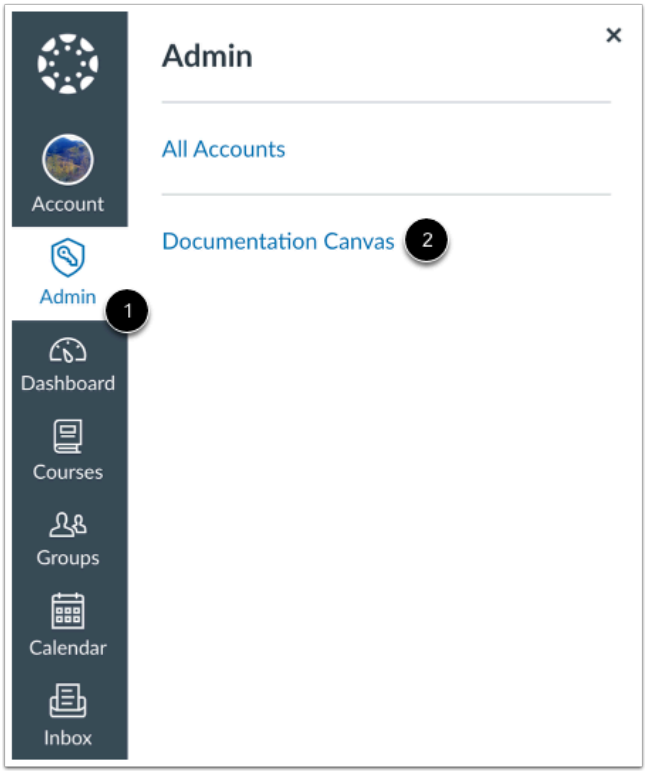
You can manually manage a user's login information in an account. You can create a new login for a user to access Canvas through your Canvas URL and also delete logins.

If you have permission, you can also edit passwords for existing user logins. If you cannot view the password field for a user's existing login, you cannot edit the user's password. For assistance with this feature, please contact your Customer Success Manger. Users need to reset their passwords through the institution's password management system.

Notes:

- New or updated login information is not automatically sent to the student. Changes need to be communicated to the student. For security, login information should not be sent through email and should be communicated verbally.
- If your account manages user information through a student information system (SIS), changes will also have to be made in the SIS. Any changes made in Canvas will not be passed back to the SIS.
- A student's login displays in the secondary ID field in the Gradebook. If a student has multiple logins, the secondary ID corresponds to whatever login is listed first in the user details page unless the login includes an SIS ID. A login associated with an SIS ID regardless of position is displayed in the Gradebook as the secondary ID and the People page as the login ID.

Open Account



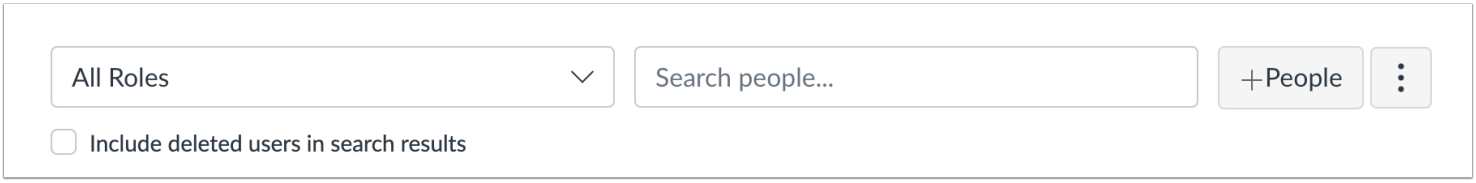
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



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

Find User



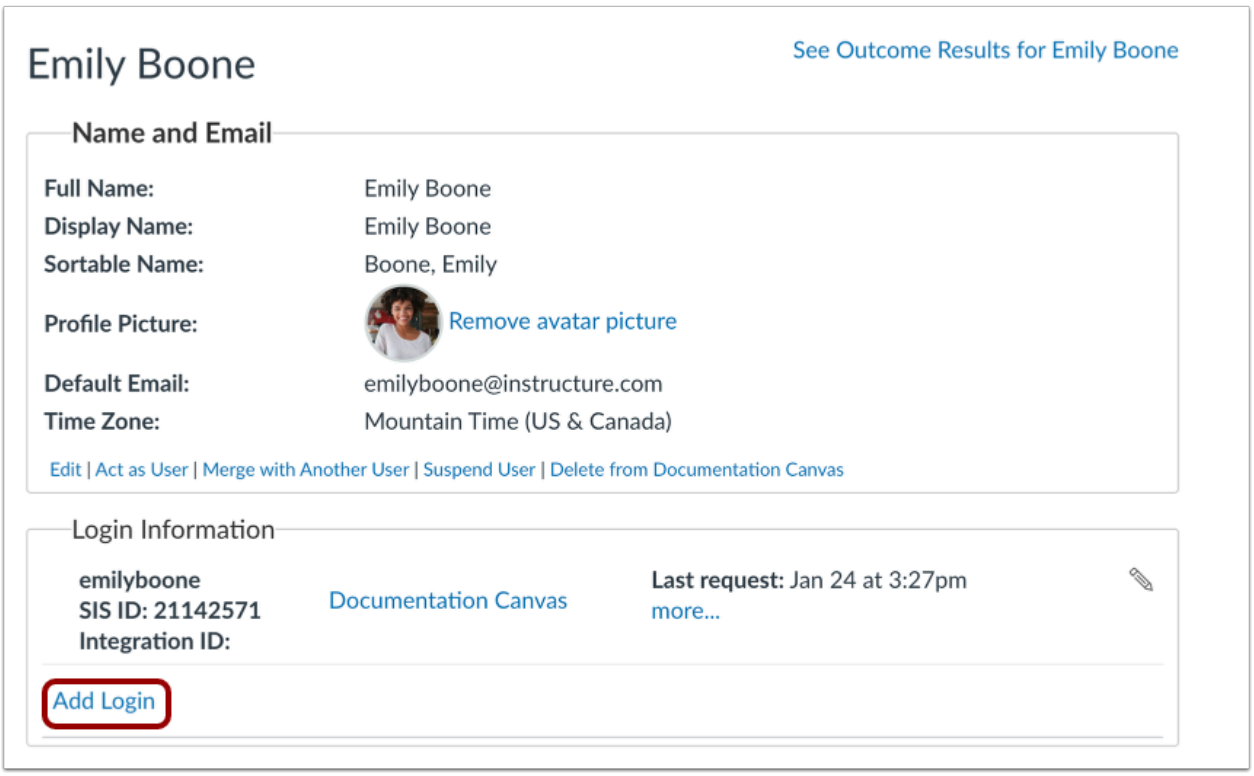
Use the filter and search options to find the user in the account.

Open User Profile

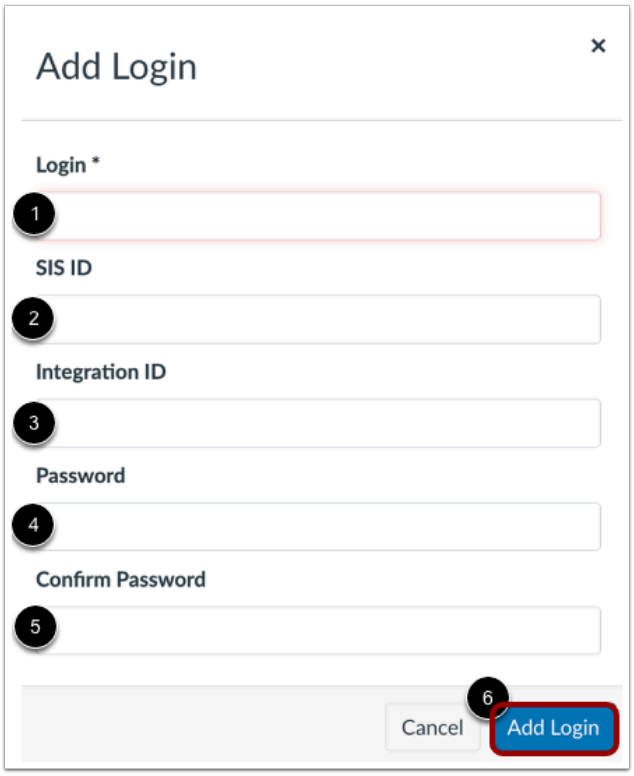


In the search results, click the user's name.

Add Login



To add a new login, click the **Add Login** link.



In the **Login** field [1], create a login for the user. The login can be a username or email and contain letters, numbers, or the following symbol characters: - _ = +.

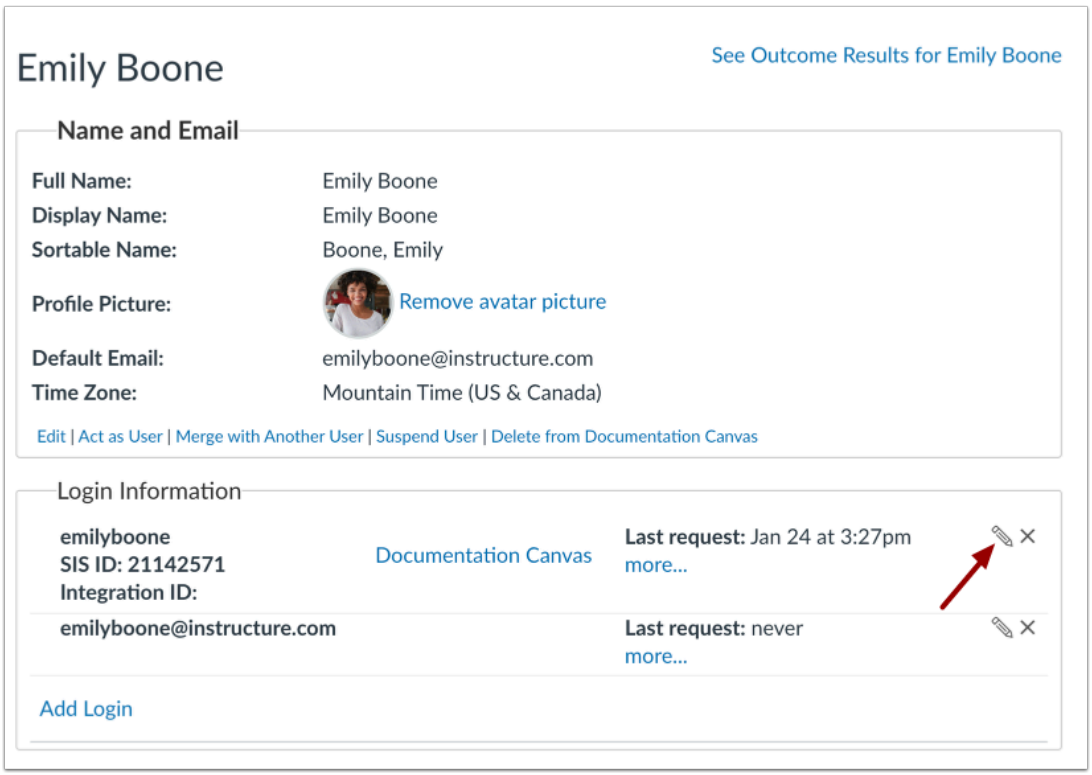
In the **SIS ID** field [2], you can add an SIS ID.

In the **Integration ID** field [3], you can add an integration ID (secondary SIS ID).

In the **Password** field [4], create a password for the user. Then confirm the password [5].

Click the **Add Login** button [6].

Edit Login



To edit an existing login, click the **Edit** icon.

Update Login

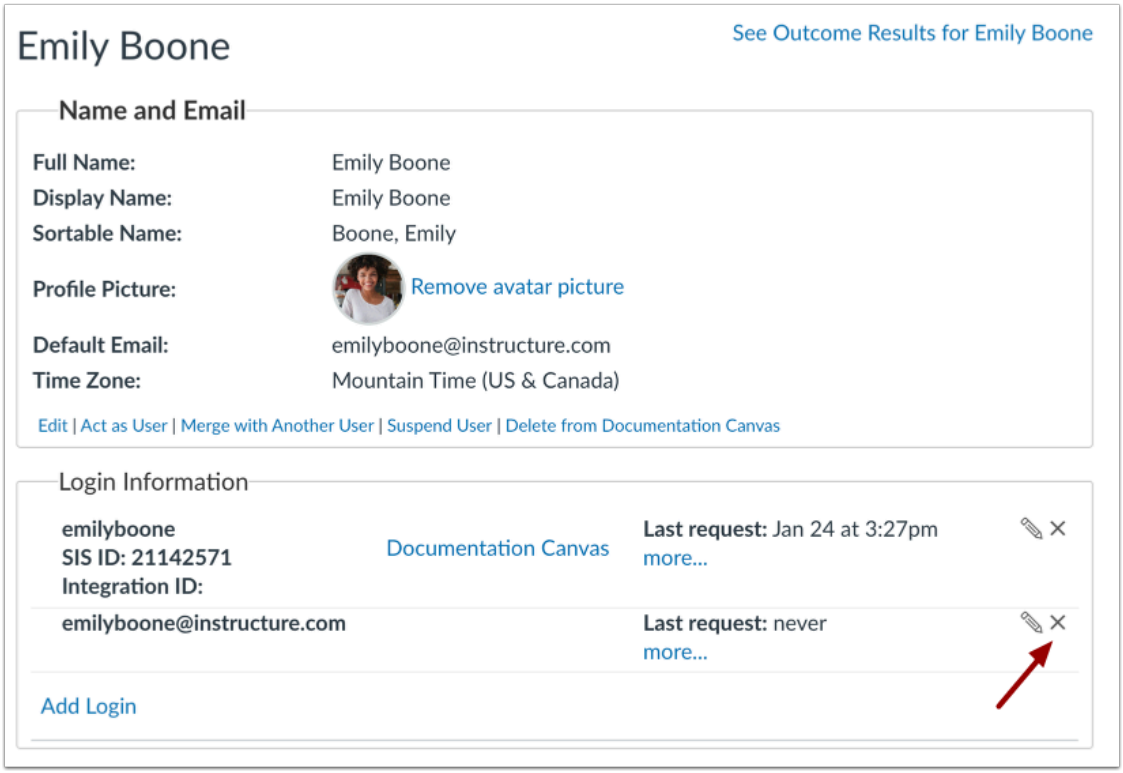


Update any login details as necessary [1].

When you are done, click the **Update Login** button [2].

Note: If you cannot view the password fields, you do not have permission to manage existing user passwords. The user must reset their password through the institution's password management system.

Delete Login



To delete a login, click the **Delete** icon.

How do I merge users in an account?

You can merge two users within your account. Merging accounts combines the logins, contact methods, and enrollments for the two user accounts. Page views are not retained for the user who was merged.

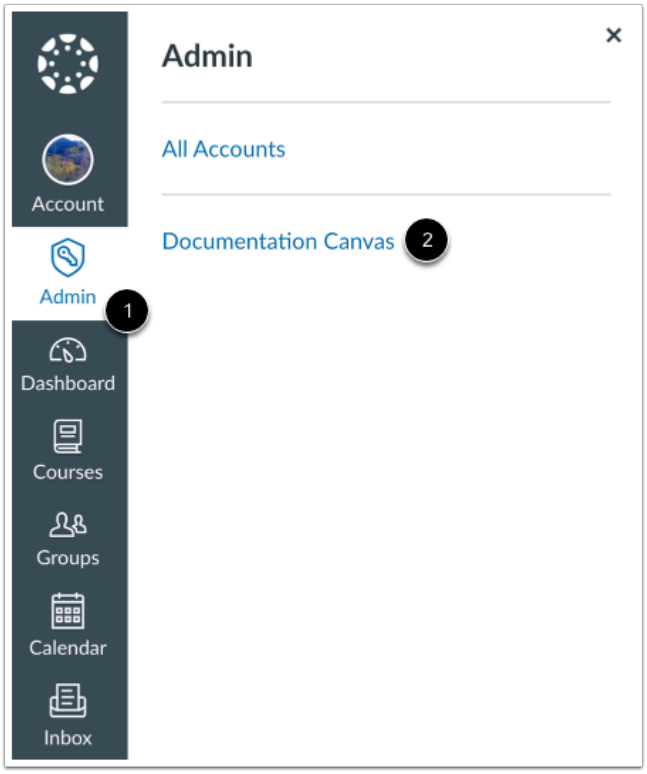
If the account being merged is enrolled in a course that the account it is being merged into is not enrolled in, grade information will be transferred to the merged account. If both accounts are enrolled in the same course, grade information from the account being merged will not be transferred.

After the accounts have been merged, the user can use the logins that originated from either account to view all their course enrollments within the same account.

Notes:

- If you cannot merge users, you may not have the appropriate permissions or merging users has been turned off in your account.
- If necessary, user accounts can be split using the Canvas Users API or using the Split Merged Users link within 180 days of the user merge; however, merged users cannot be fully restored to their previous state.
- A manual merge of user accounts in different instances is not supported.

Open Account



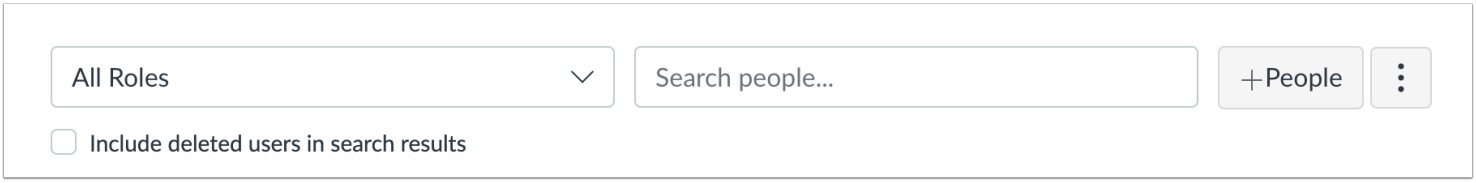
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



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

Find User



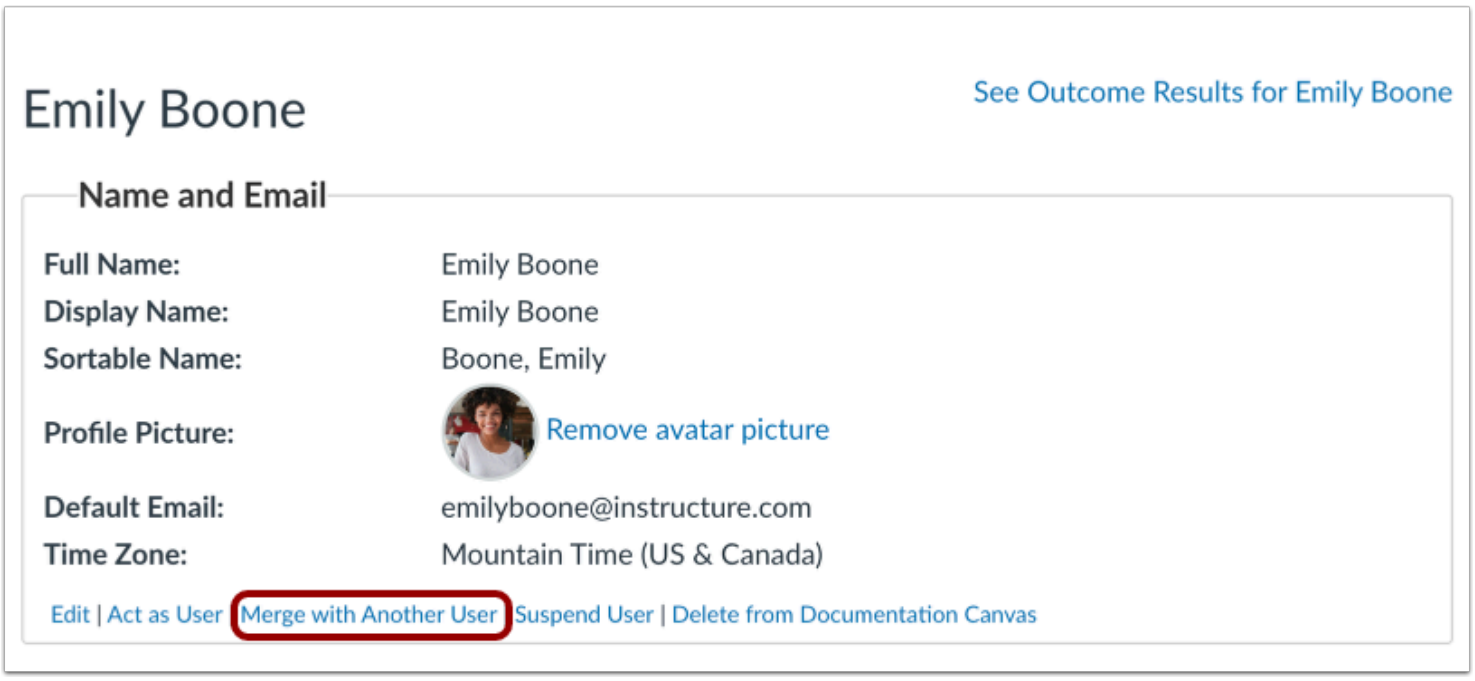
Use the filter and search options to find the user in the account.

Open User Profile



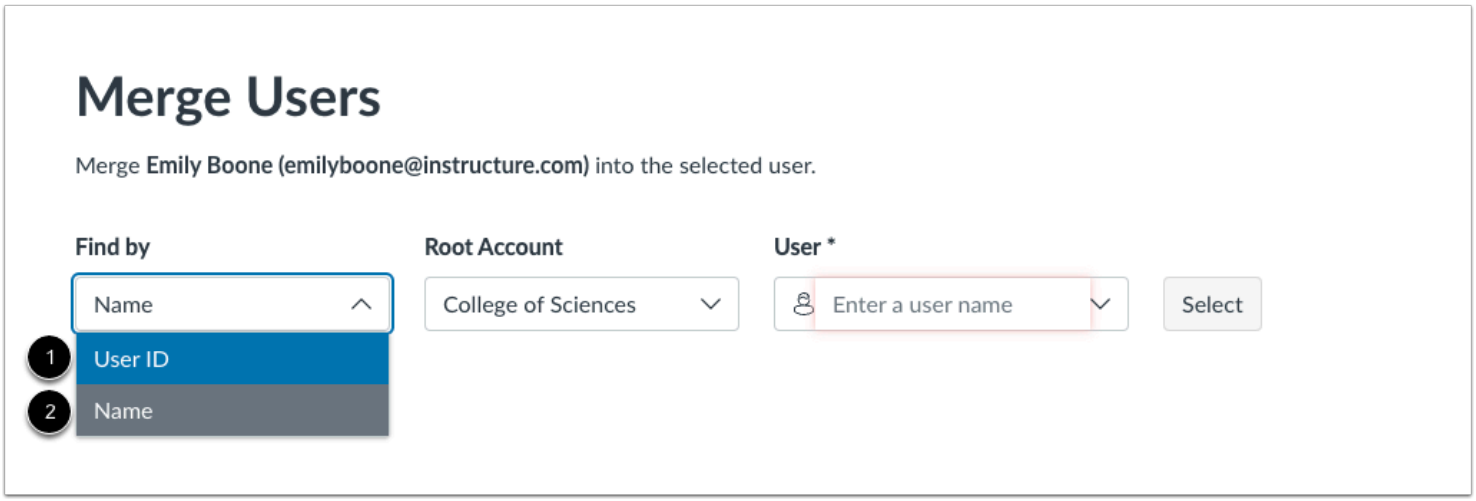
In the search results, click the user's name.

Merge User

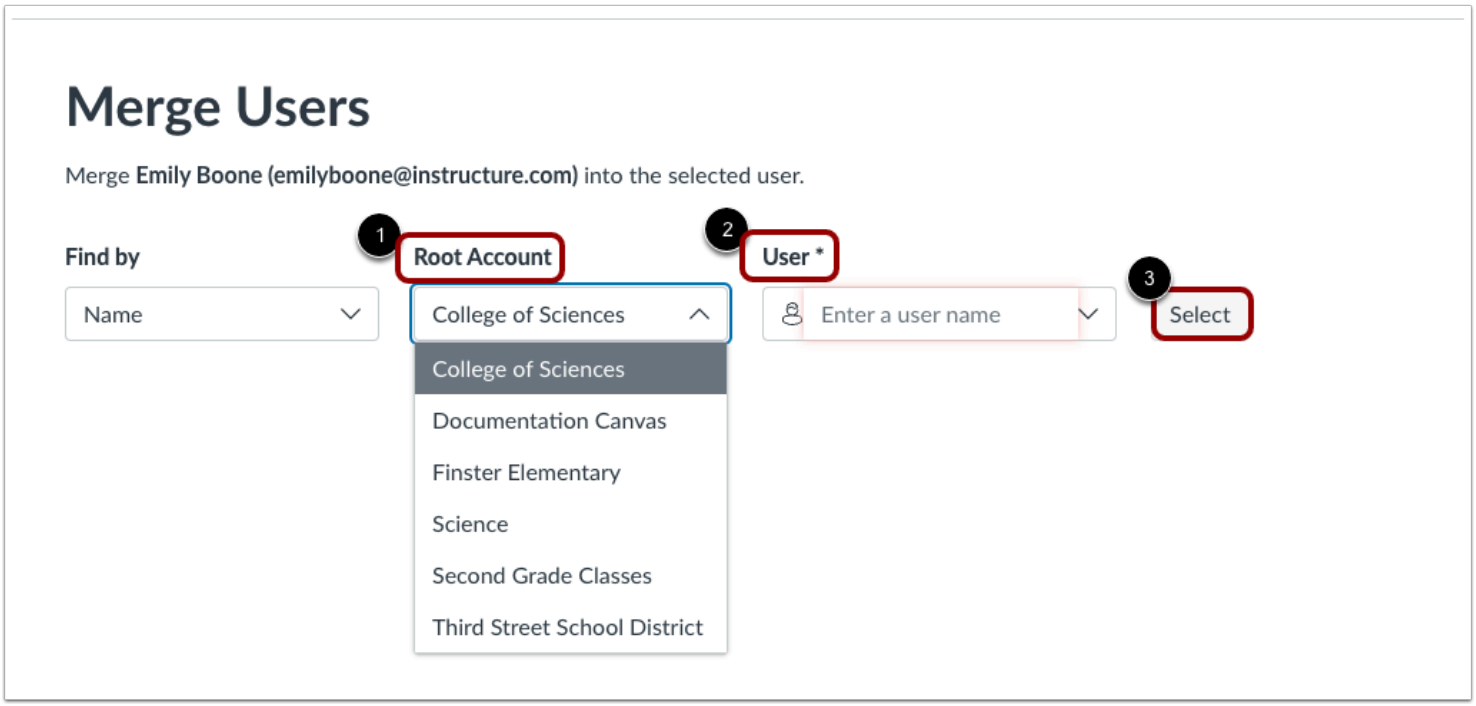


Click the **Merge with Another User** link.

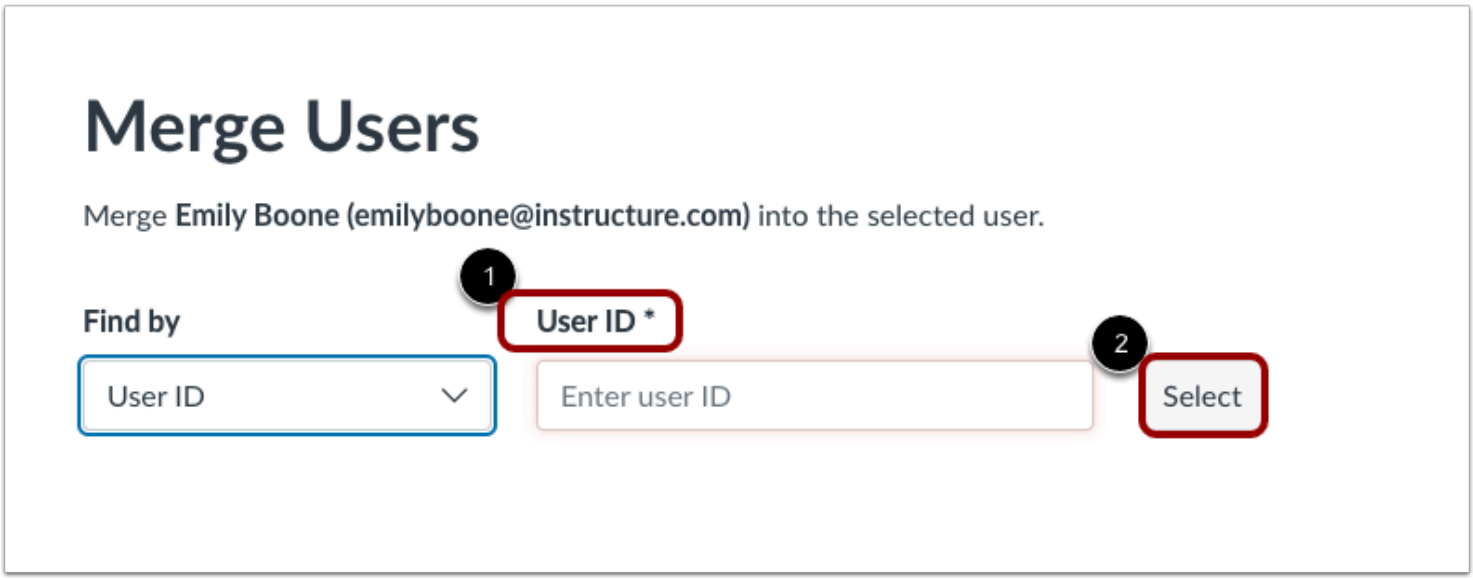
Find User Account



Locate the user account where you want to merge the user's information. In the drop-down menu, find a user either by the **User ID** [1] or the **Name** [2].



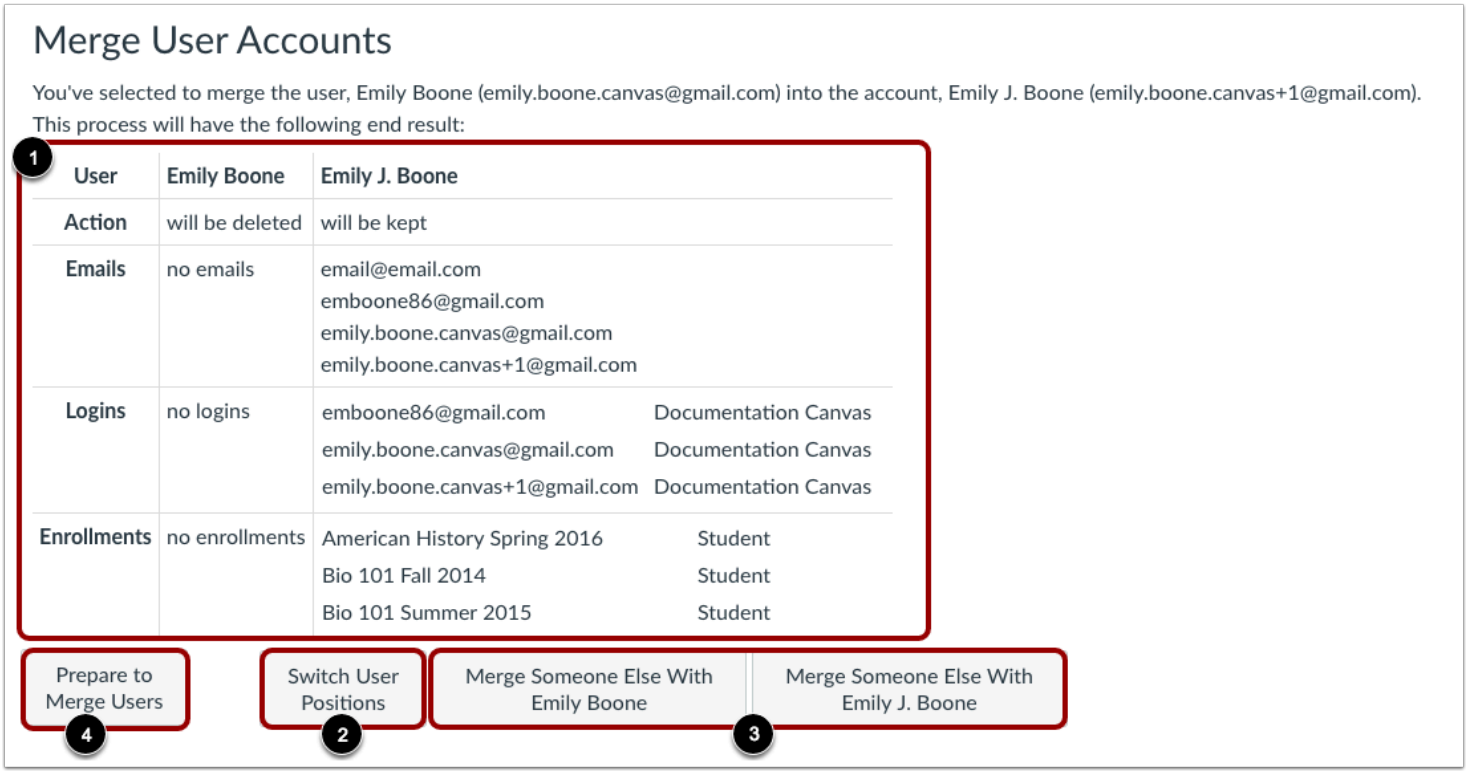
To find a user by name, you may select from the **Root Account** drop-down menu [1]. Then, enter the user's name in the **User** field [2]. After confirming the user, click the **Select** button [3].



To find a user by user ID, enter the ID in the **User ID** field [1] and click the **Select** button [2].

Note: The User ID is found at the end of your Canvas URL (i.e. account.instructure.com/account/XXXXXX/users/XXXXXX).

Merge User Accounts



After selecting the user account to merge, you will see the process and end result table.

The table will show you the **User**, **Action**, **Emails**, **Logins**, and **Enrollments** of each user [1]. The table will tell you what will be deleted and kept.

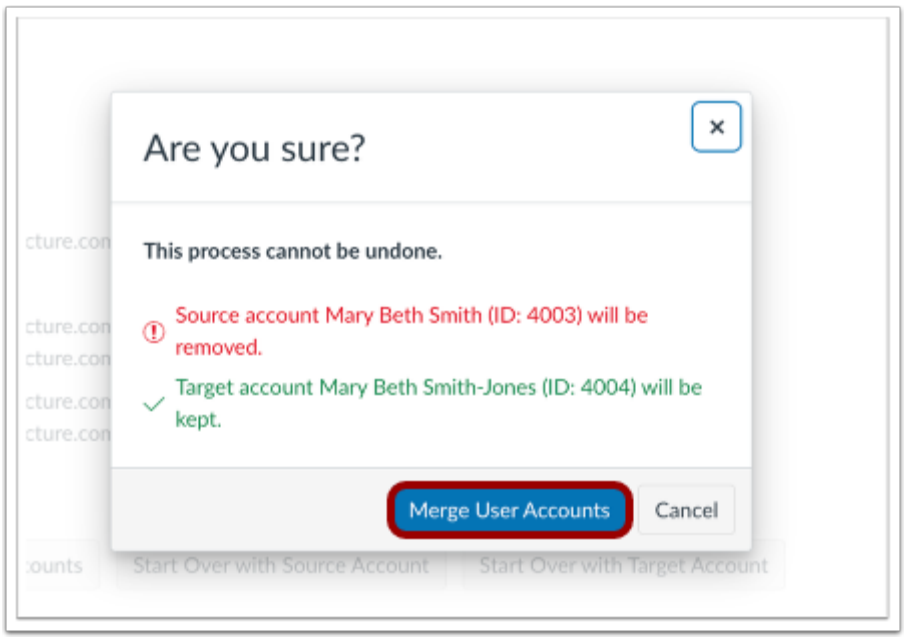
If you want to change positions of the users so one gets deleted and the other does not, click the **Switch User Positions** button [2].

You can also click the **Merge Someone Else With [User Name]** [3] for either of the users if you decide to change the users.

When you are ready, click the **Prepare to Merge Users** button [4].

Note: The table will not display enrollments in concluded courses or courses in an unpublished state.

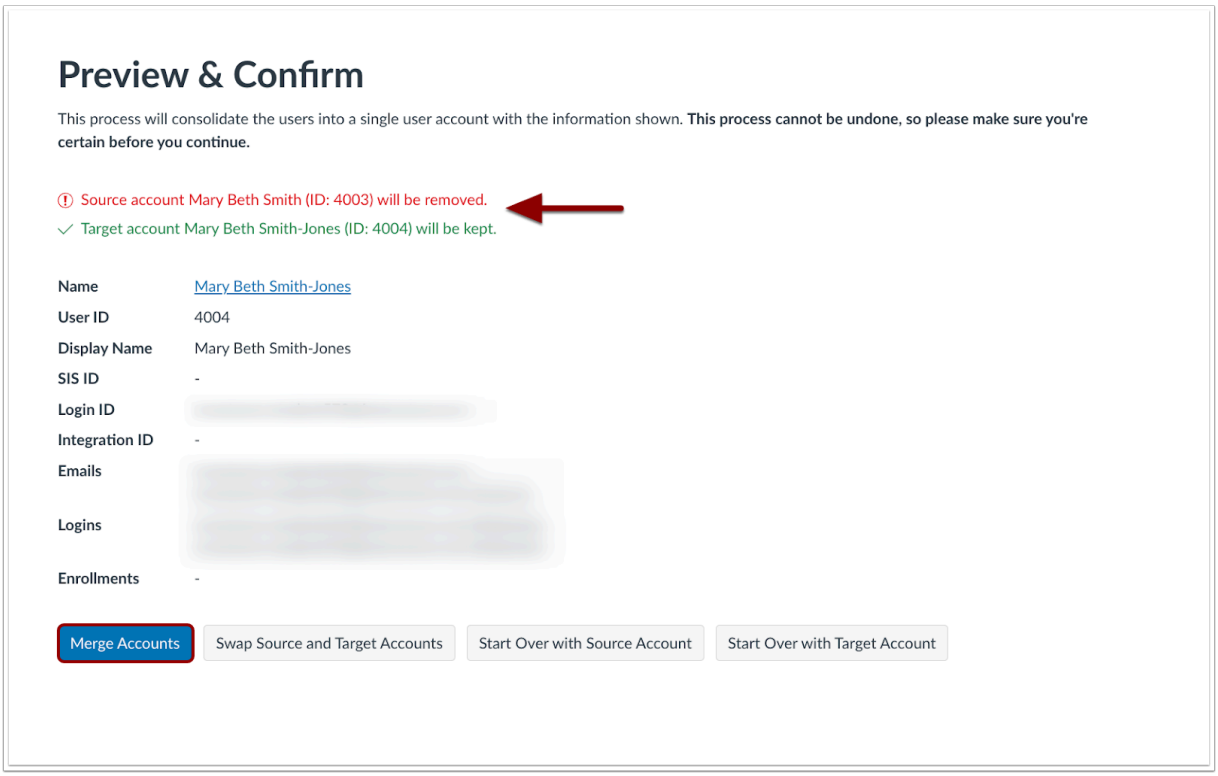
Confirm Merge



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.

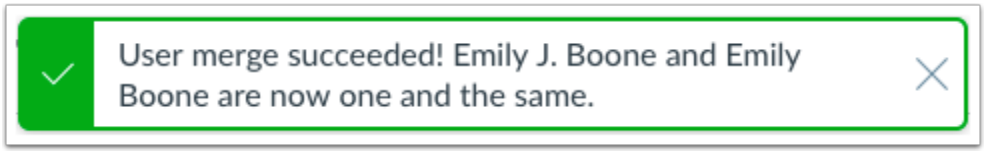
Note: This process cannot be undone.

Preview Confirmation



A confirmation modal displays for admins before merging user accounts. Once you have confirmed all the details, click the **Merge Accounts** button.

View Confirmation



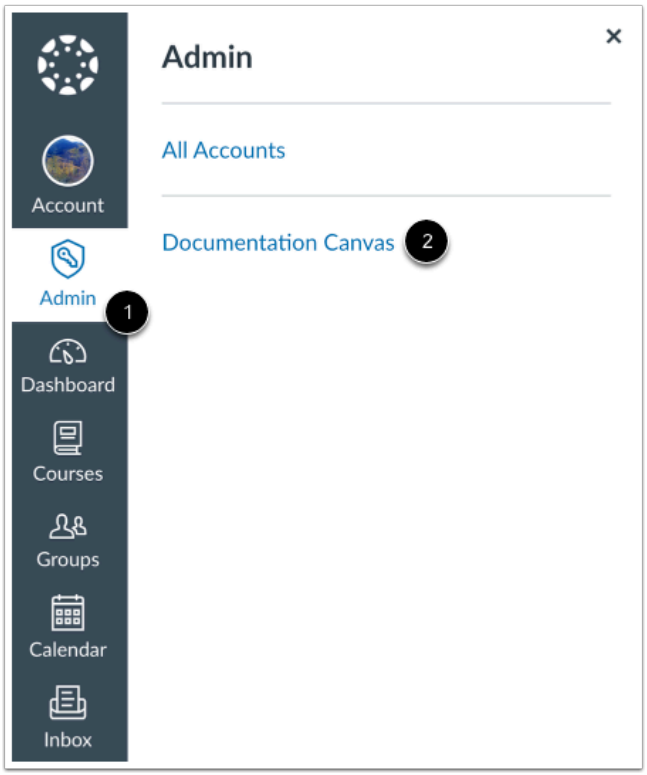
Confirm the merge was successful.

How do I split merged users in an account?

If user accounts have been merged previously, you can split them using the Split Merged Users option on the account-level Users page.

You can split previously merged users within 180 days of the user merge. However, merged users cannot be fully restored to their previous state. If the Split Merged Users option does not display, the 180-day limit has expired and the user can no longer be split from the previous merge. Users can also be split using the Canvas Users API.

Open Account



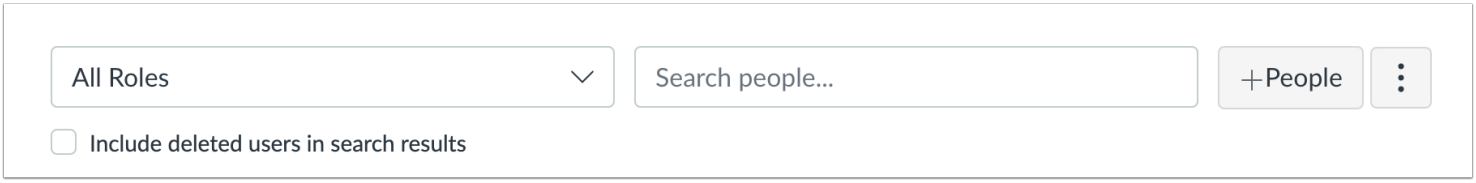
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



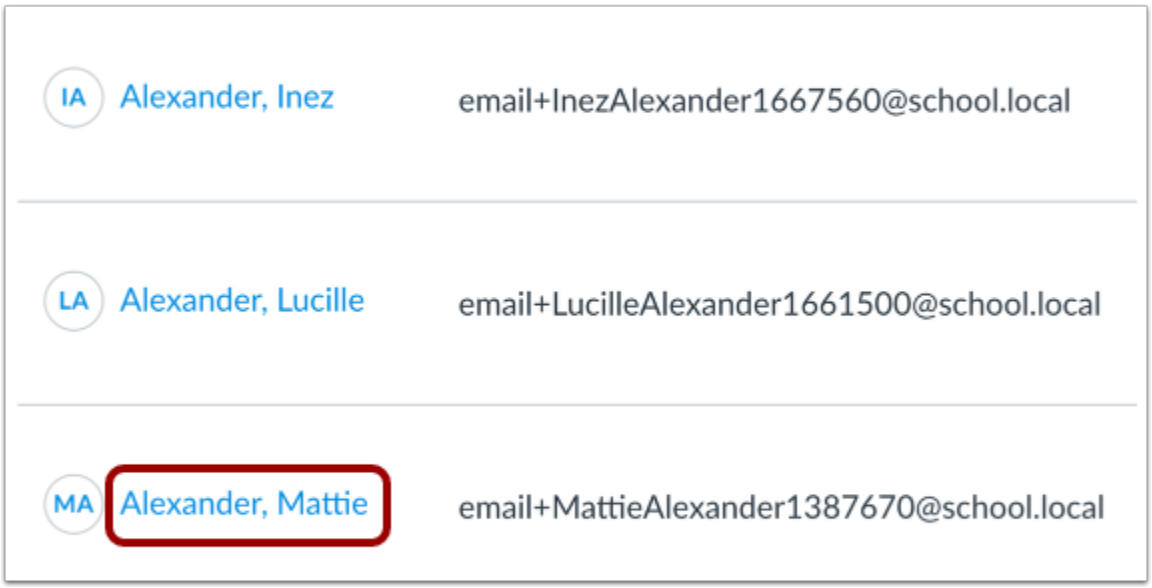
In Account Navigation, click the **People** link.

Find User



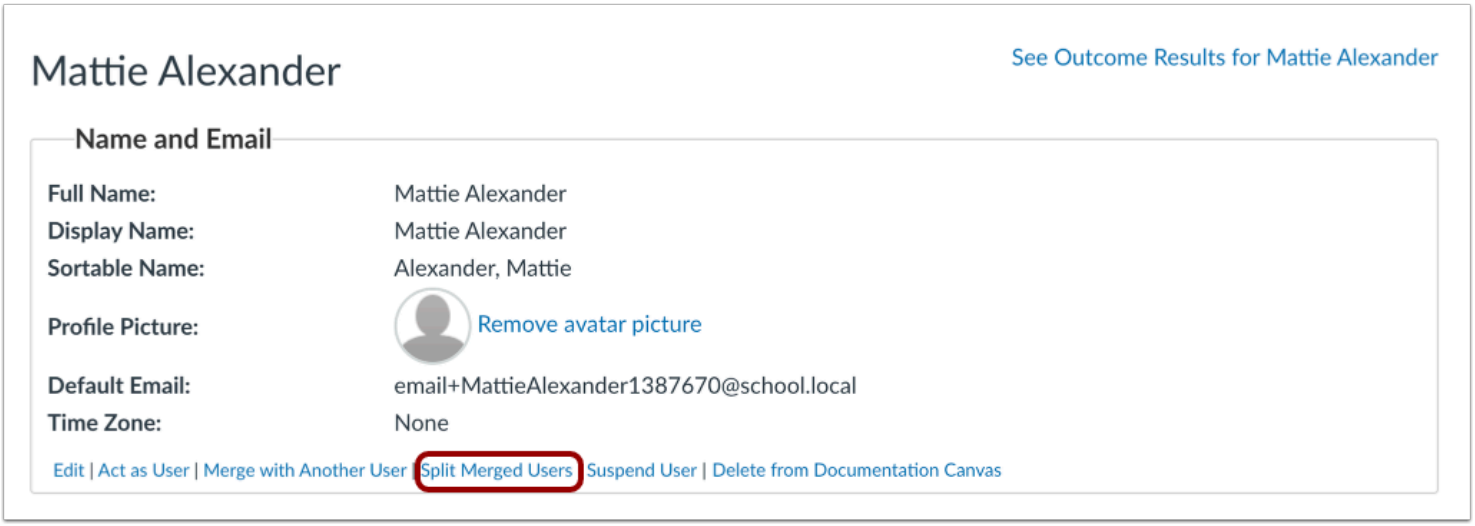
Use the filter and search options to find the user in the account.

Open User Profile



In the search results, click the user's name.

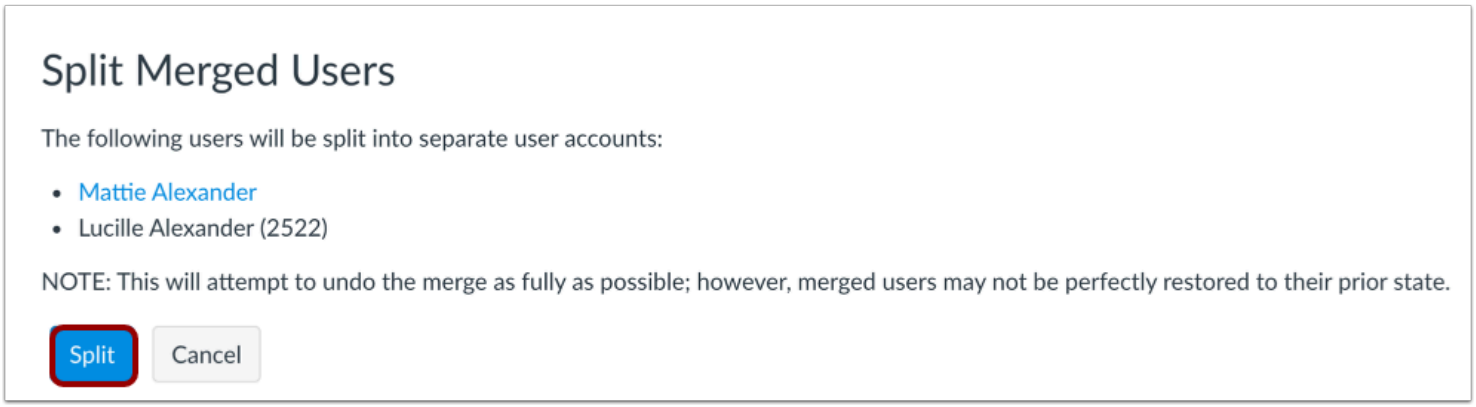
Split Merged Users



Click the **Split Merged Users** link.

Note: If the Split Merged Users option does not displayed, the 180-day limit has expired and the user can no longer be split from the previous merge.

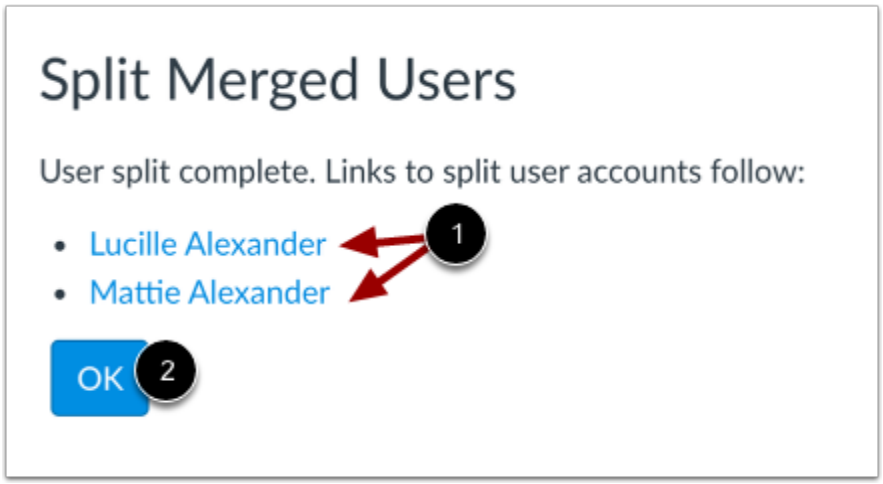
Split Merged User Accounts



Click the **Split** button.

Note: You can split previously merged users within 180 days of the user merge. However, merged users cannot be fully restored to their previous state.

View Confirmation



To view the split user accounts, click the user's name [1]. To return to the user's profile, click the **OK** button [2].

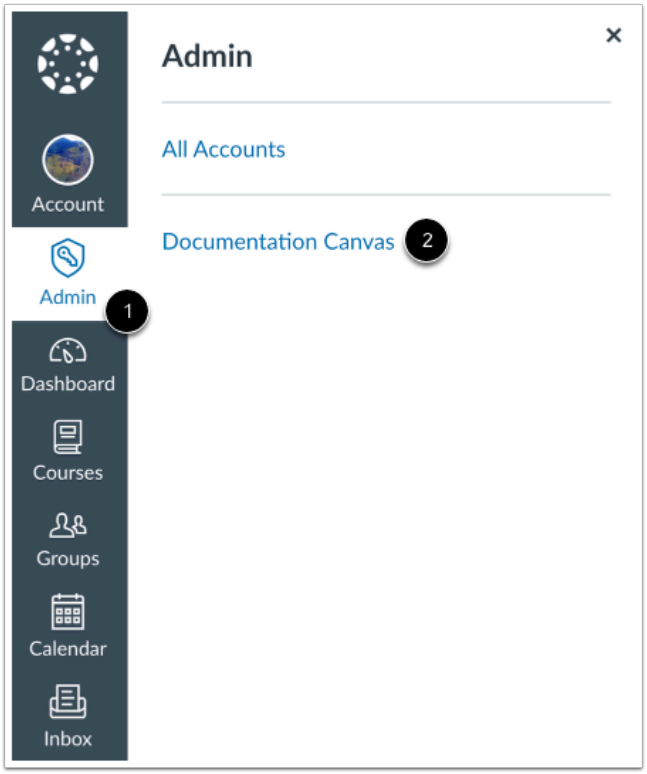
How do I delete a user from an account?

You can delete a user from your account.

Notes:

- If your account manages user information through a student information system (SIS), changes will also have to be made in the SIS. Any changes made in Canvas will not be passed back to the SIS.
- You have the capability to restore a deleted user.

Open Account



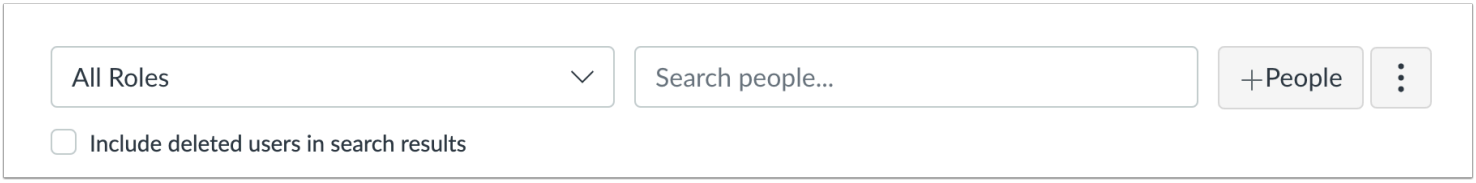
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



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

Find User



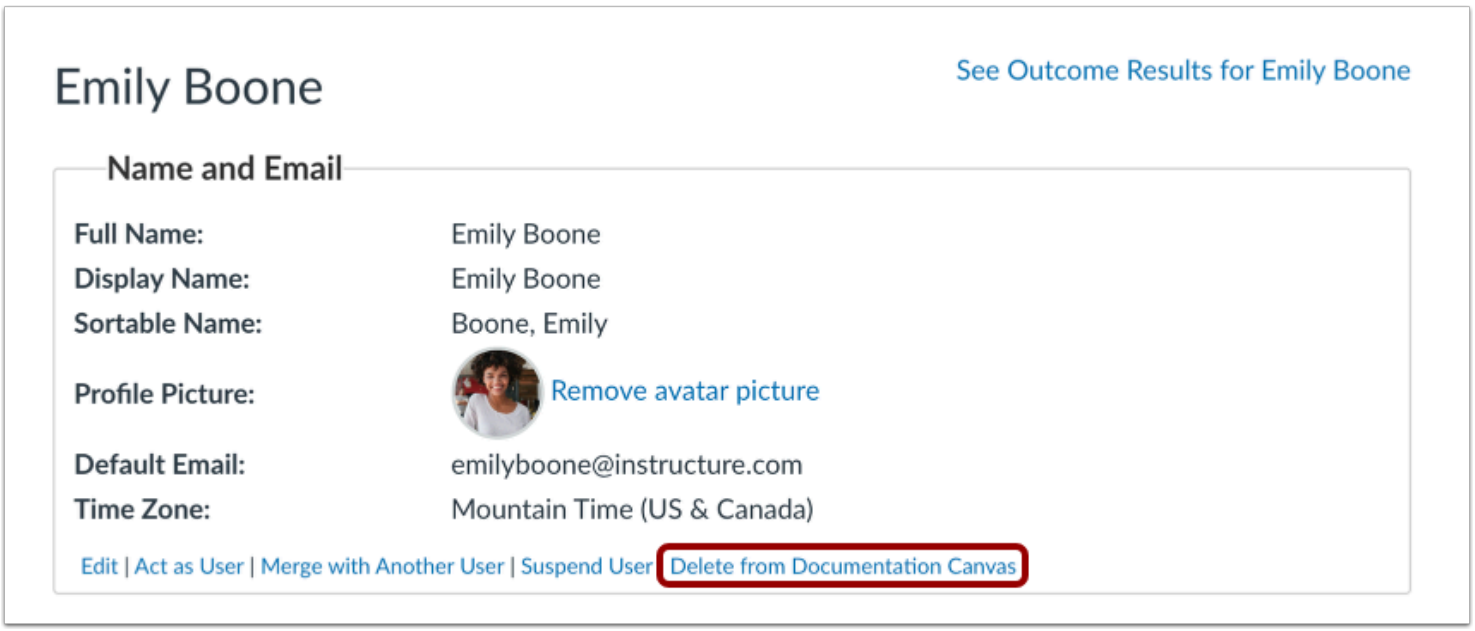
Use the filter and search options to find the user in the account.

Open User Profile



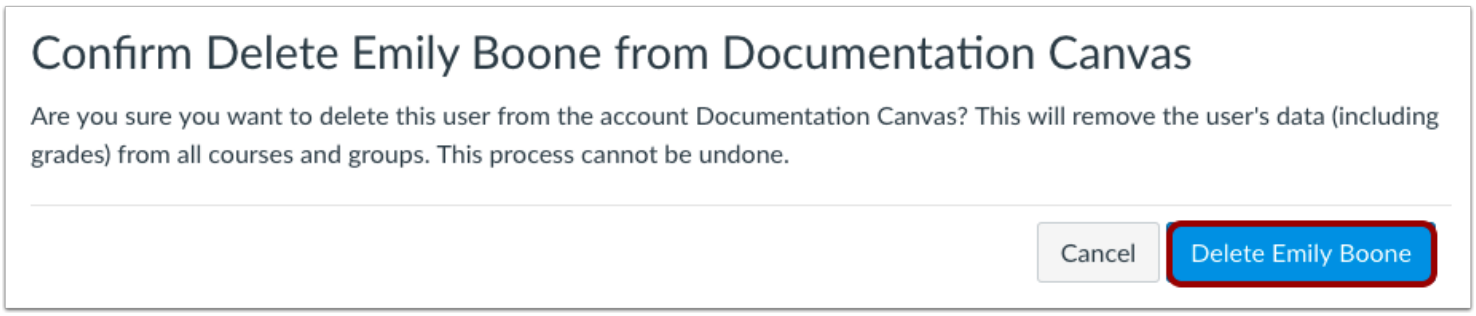
In the search results, click the user's name.

Delete User



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 and ePortfolios) from all courses and groups.

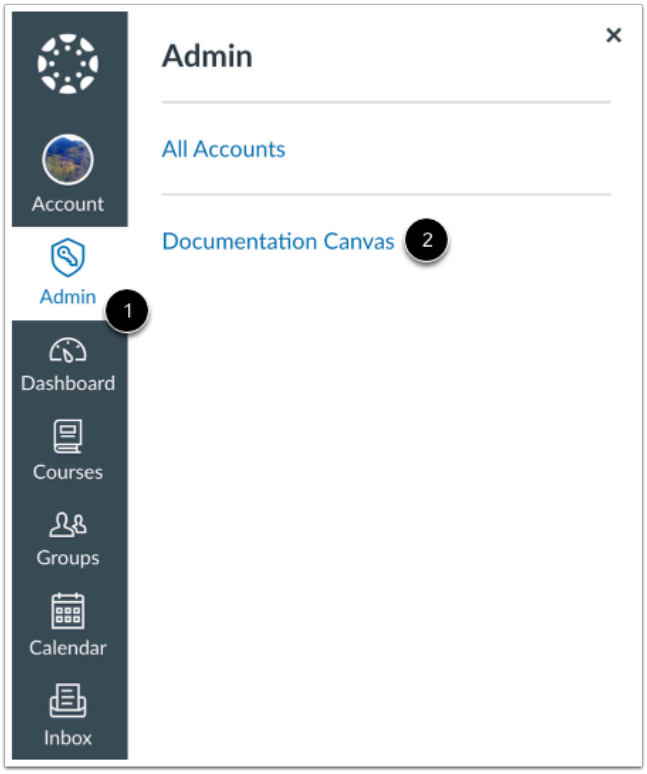
How do I suspend or reactivate users in an account?

You can suspend and reactivate a user's profile. Suspending a user allows you to remove the user's login access to authorized systems. Reactivating a user allows the user to log into Canvas and regain access to previously authorized API integrations.

Notes:

- User suspension and reactivation is also supported in the SIS Export report.
- Users with multiple pseudonyms will continue to receive notifications unless all pseudonyms are suspended.
- Only root account admins can view and manage suspensions.
- Suspending a student does not affect the student's Canvas enrollment status.
- Suspending a student will block their login on the mobile app, but won't log them out if they're already signed in.
- To prevent user access to Canvas, their sessions must be terminated via the API, requiring them to log in to Canvas on any web browsers and re-authorize any third-party apps (including the Canvas Mobile app).
- Access tokens for the app must be removed from the user's Approved Integrations. You can manage API access tokens from your User Settings.

Open Account



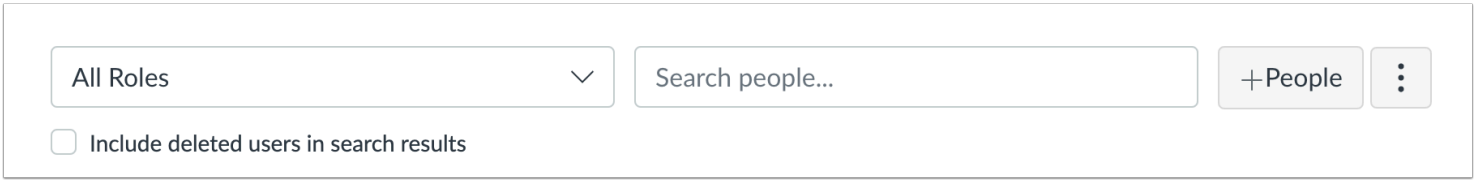
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



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

Find User



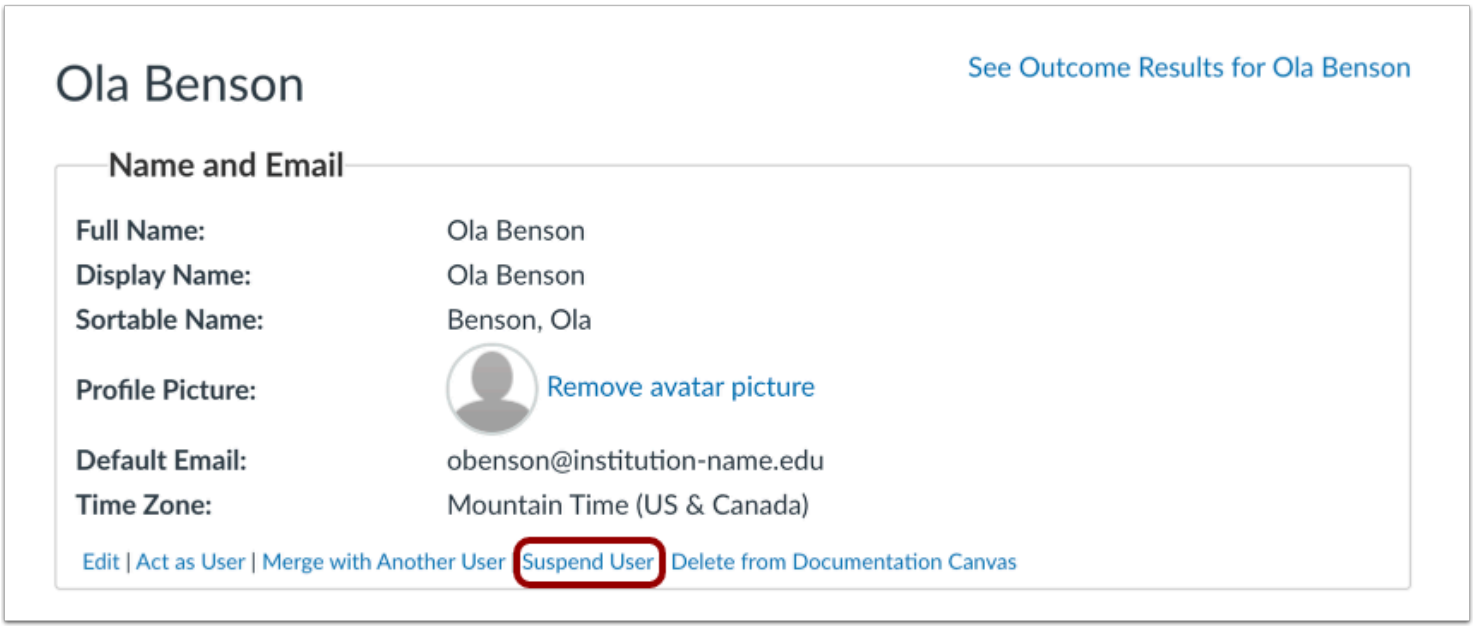
Use the filter and search options to find the user in the account.

Open User Profile



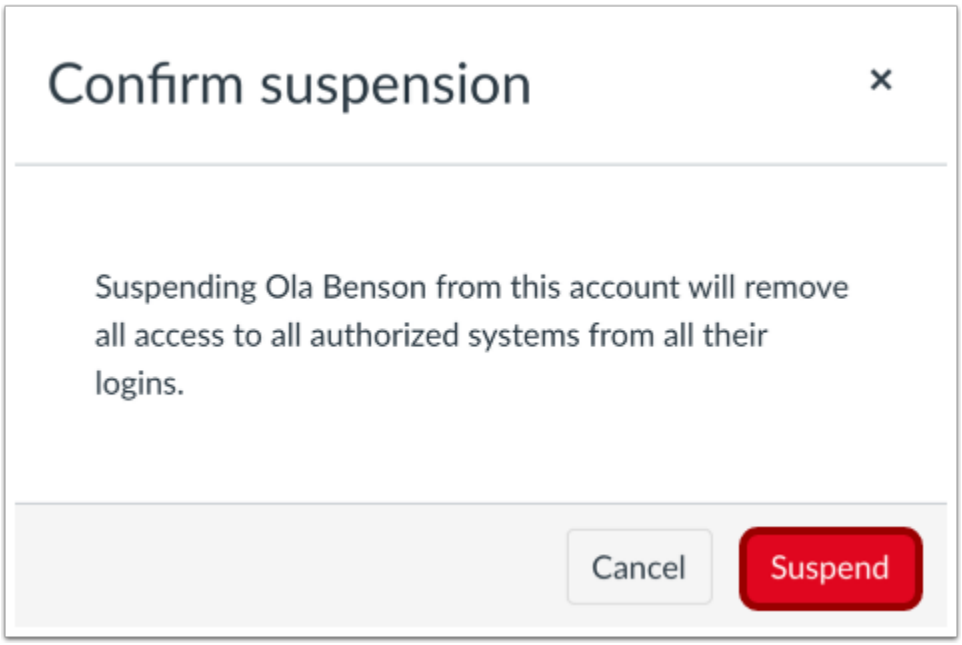
In the search results, click the user's name.

Suspend User



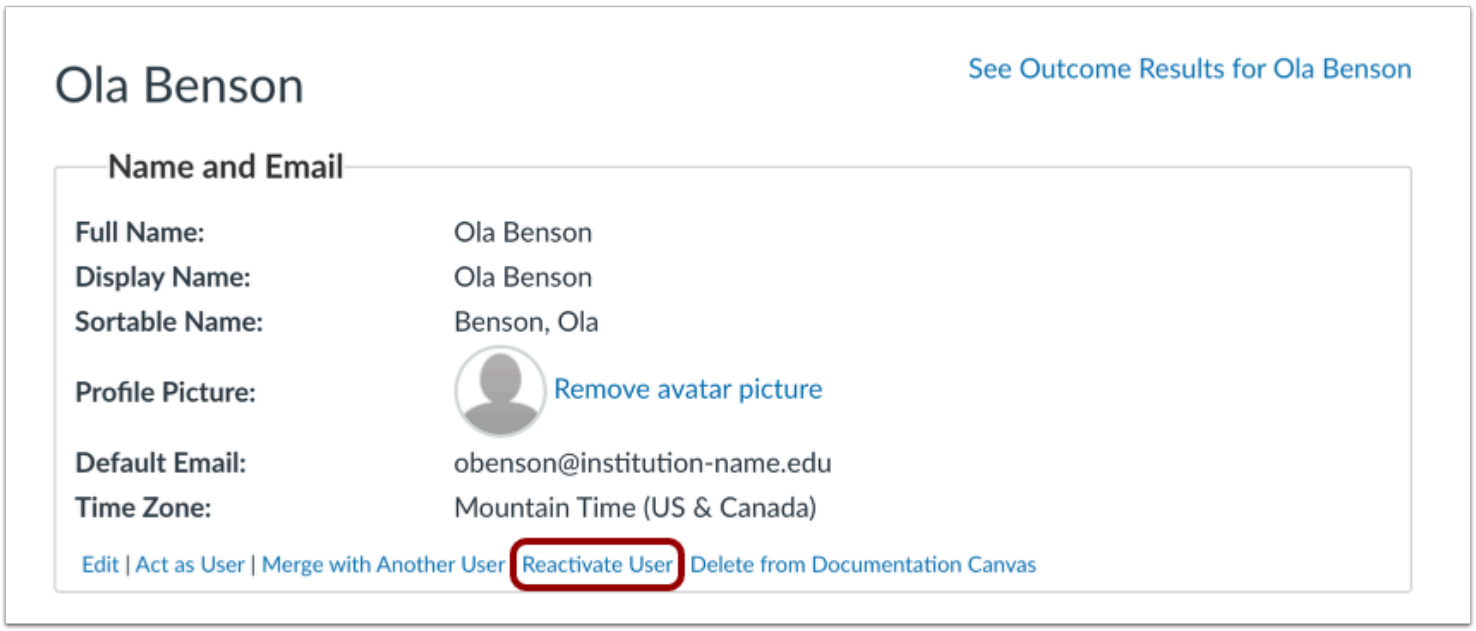
Click the **Suspend User** link.

Confirm Suspension

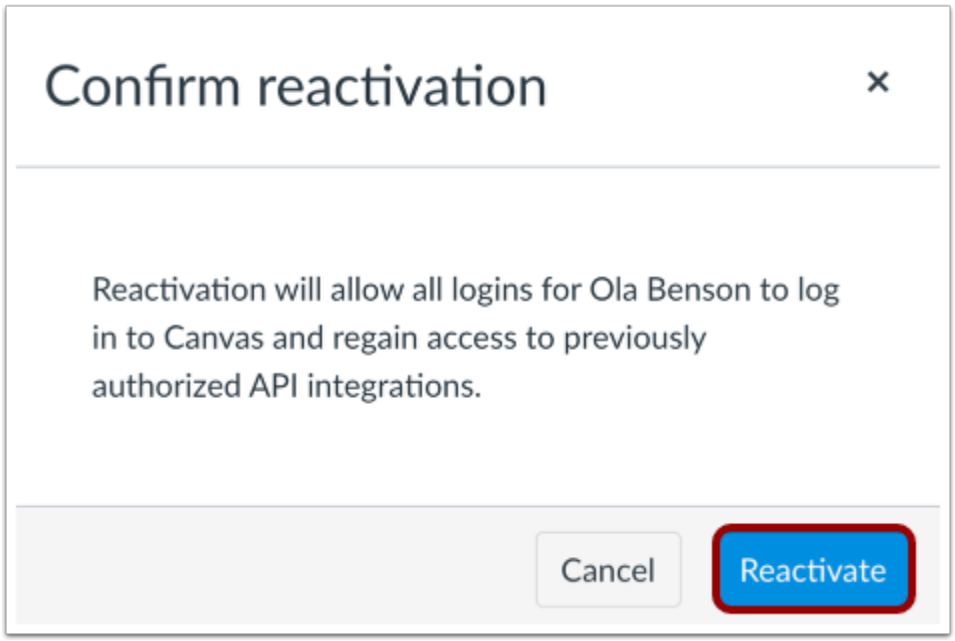


To suspend a user and remove all of their login access to authorized systems, click the **Suspend** button.

Reactivate User



To allow a user to login again, click the **Reactivate User** link.



Click the **Reactivate** button.

How do I act as another user in an account?

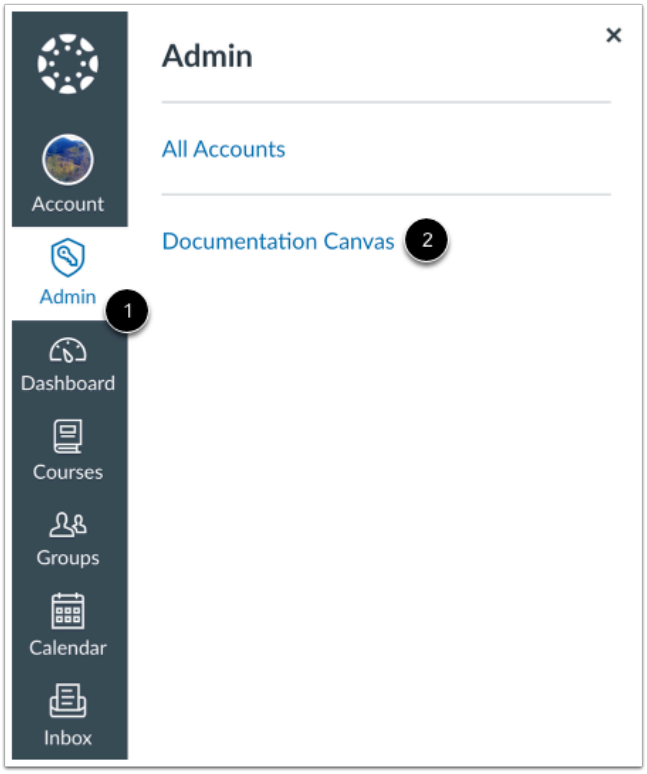
Acting as a user allows admins to log in as the user without a password. You can take any action as though you are the user. From other users' points of views, it will be as if this user performed them. However, the audit logs will show that you performed the tasks while acting as that user. Audit logs can be viewed by admins who have access to Canvas Data files. Audit logs are also available by downloading the Page Views CSV file. This file displays all user activity for a specific user, including actions an admin performs when they masquerade as the user.

To act as a user in an account, admins must be assigned the *Users - Act as* permission. The *Users - Act as* account permission can only be managed from the root account and cannot be enabled at the sub-account level. The *Users - Act as* permission should only be assigned to users that your institution has authorized to act as other users in your entire Canvas account. Users with this permission may be able to use the Act as feature to manage account settings, view and adjust grades, access user information, etc. This may include admins designated to a sub-account accessing settings and information outside of their sub-account.

Notes:

- When acting as a user, language preferences do not apply and will always be shown in the default language.
- To act as another admin, you must have all the permissions enabled in your account that have been enabled for that admin.
- If your institution has a trust agreement with another institution, trust accounts do not grant permission for you to act as users associated with a different Canvas URL. You can only act as users who are associated with your same account.
- Additionally, once you are acting as a user, any user role that can view the user details page displays the Act as Users link in the user details page. This behavior takes place because of an override to your permissions and helps you quickly act as another user; *it does not mean* that the user for whom you are acting is also able to act as other users.
- Any Canvas feature that requires or modifies a user's API access token cannot be modified through acting as a user.
- When you act as another user as an admin, the Recent History link displays the recent history for the student, not the page views you create.

Open Account



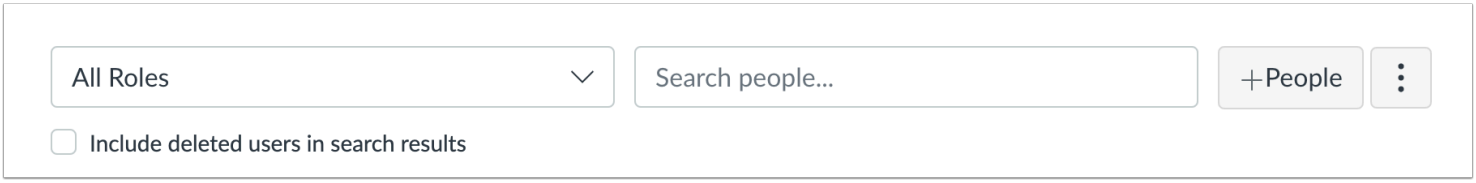
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



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

Find User



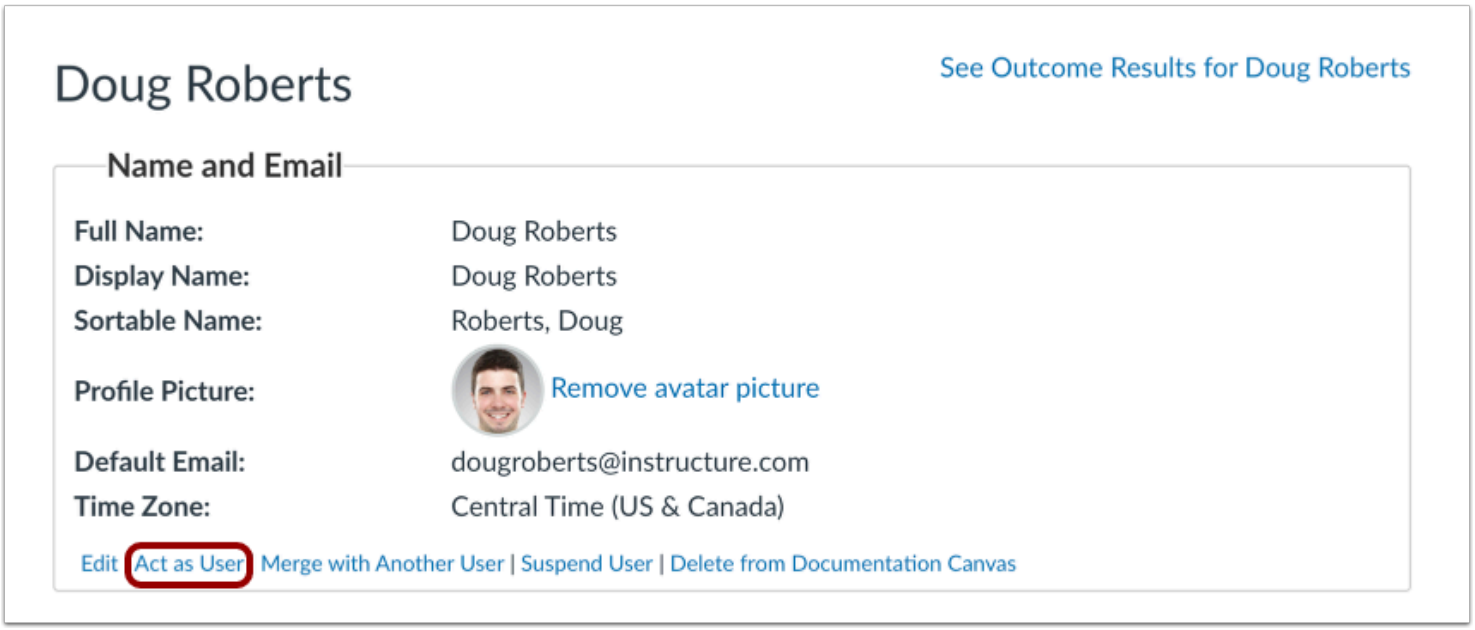
Use the filter and search options to find the user in the account.

Open User Profile



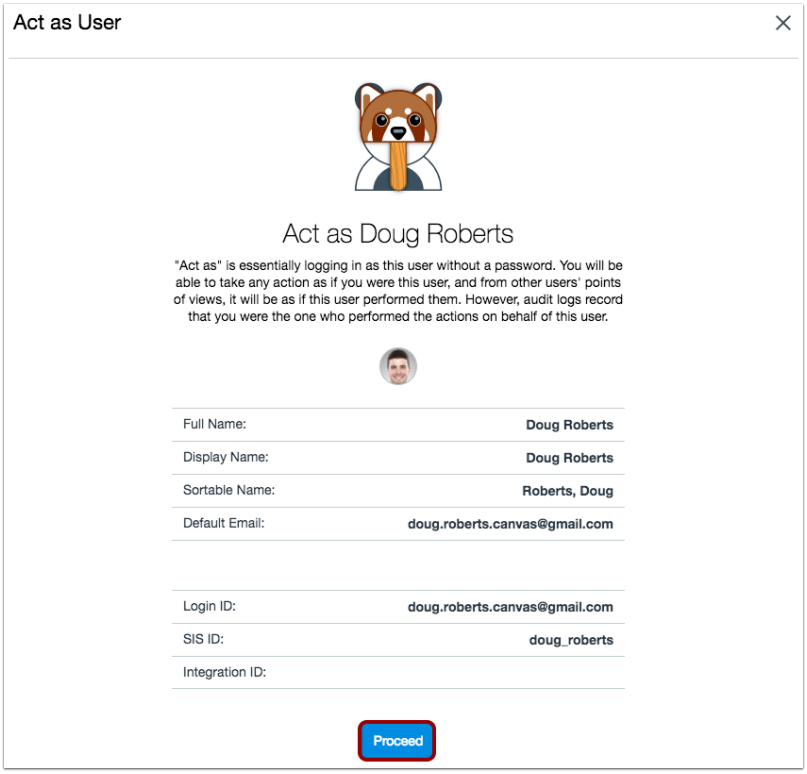
In the search results, click the user's name.

Act as User



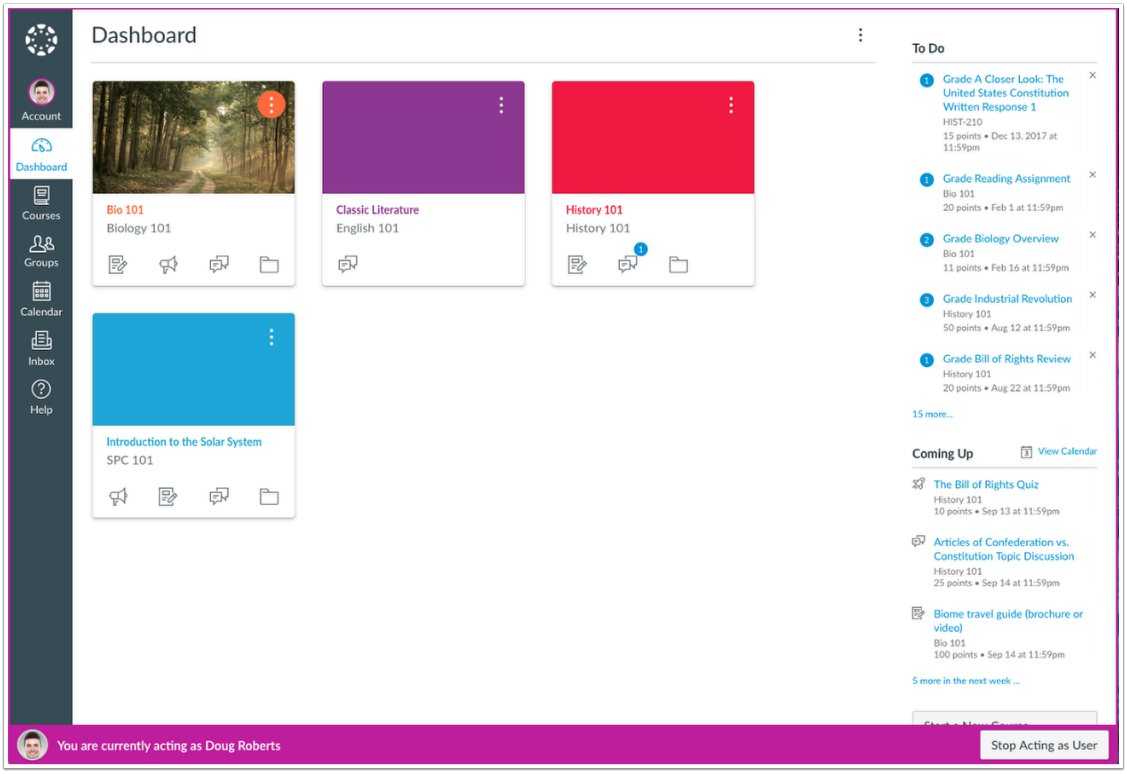
Click the **Act as User** link.

Proceed as User



The Act as User page confirms the user's information. If the user has multiple login credentials, all login IDs are displayed for additional user verification. Click the **Proceed** button.

View Canvas as User



While you are acting like the user you will see what the user sees, but the audit reports will show that you performed those tasks and not the actual user. You will know that you are acting as a user by the information box at the bottom of the screen that says **You are currently acting as [User]**.

Stop Acting as User



When you are finished acting as the user, click the **Stop Acting as User** button.

How do I add temporary enrollments in an account?

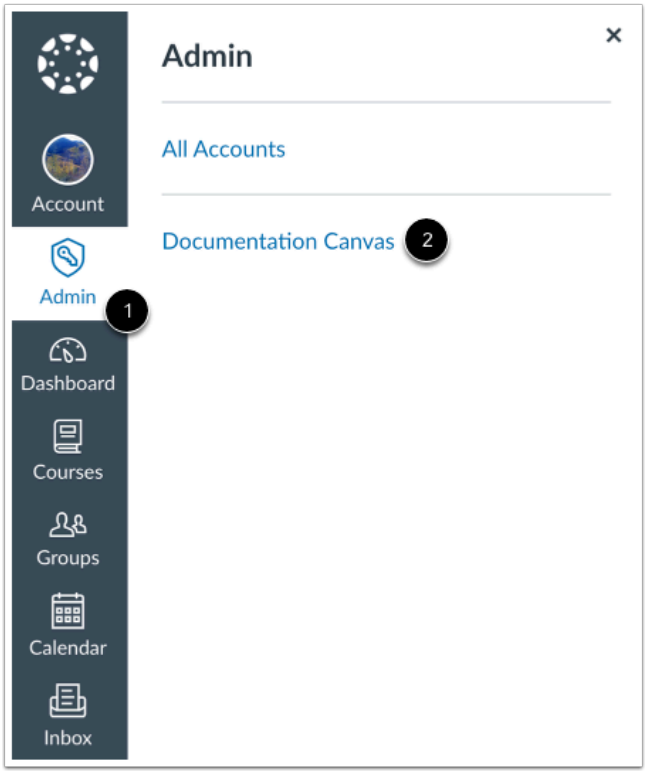
When enabled, the Temporary Enrollments feature option allows you to temporarily enroll various users such as mentors, substitute teachers, designers, and other roles into other user's courses as needed.

This feature allows authorized admins to quickly share all or some enrollments from a Provider to a Recipient, with the ability to schedule when enrollment should begin and end, and what role the Recipient should receive. Once established, Temporary Enrollment Pairings can be viewed and managed.

Notes:

- To use this feature option, you must have the following permissions: Temporary Enrollments-add AND one of the following: Users Designer-add, Users Observer-add, Users Students-add, Users TAs-add, Users Teachers-add, SIS Data-read.
- When Temporary Enrollments is enabled, sub-account admins can create temporary enrollment pairings. Additionally, Root Account admins can manage temporary enrollment pairings in all sub-accounts.

Open Account



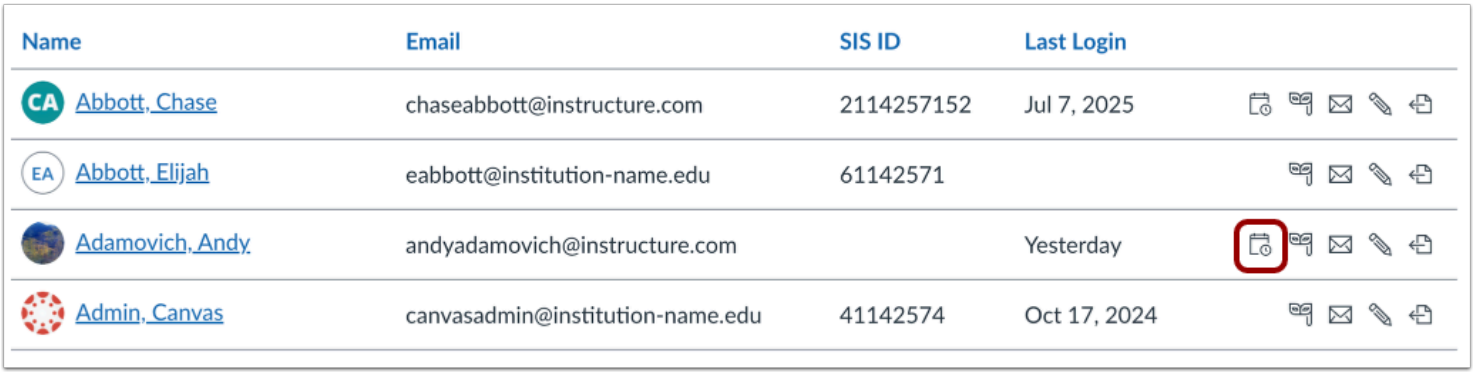
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



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

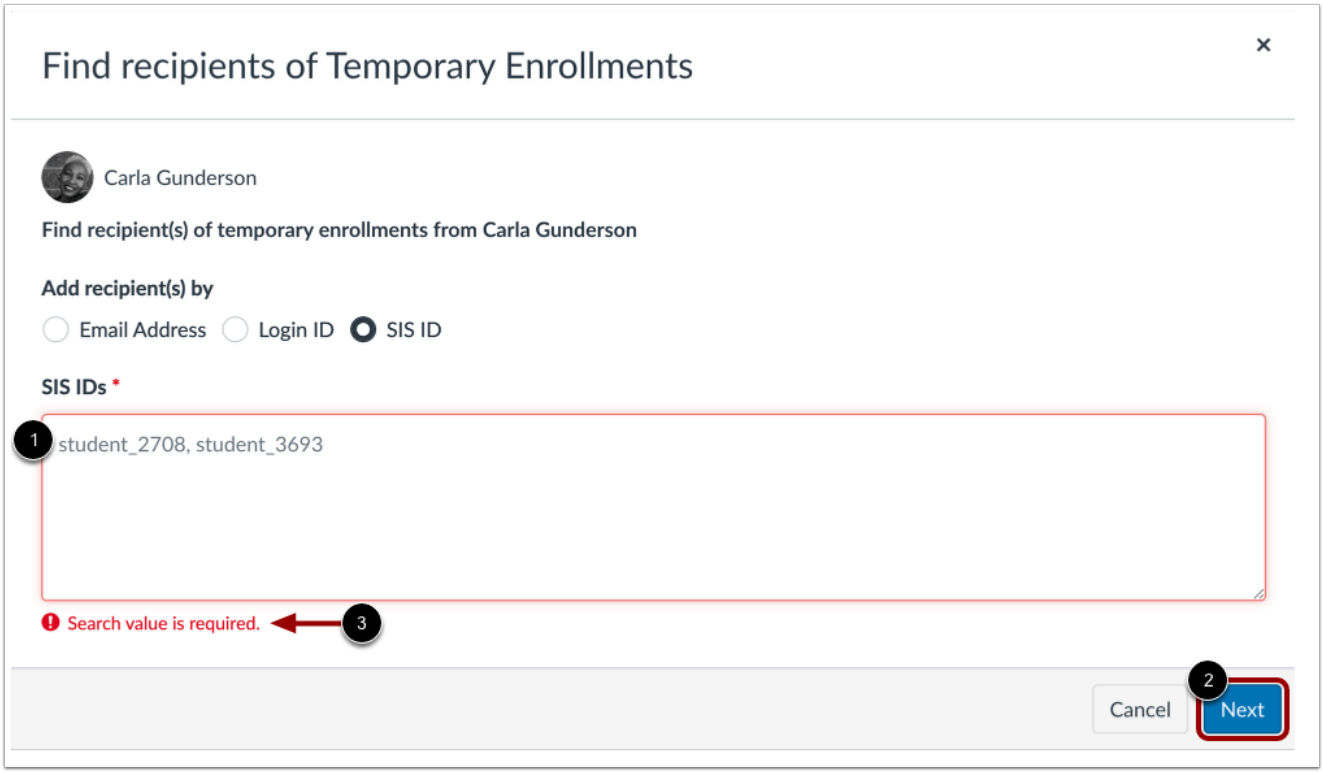
Locate User



When creating temporary enrollments, a Provider is a user whose courses are shared with another user.

To create a temporary enrollment pairing, locate the Provider. Then click the **Temporary Enrollment** icon.

Add User Details

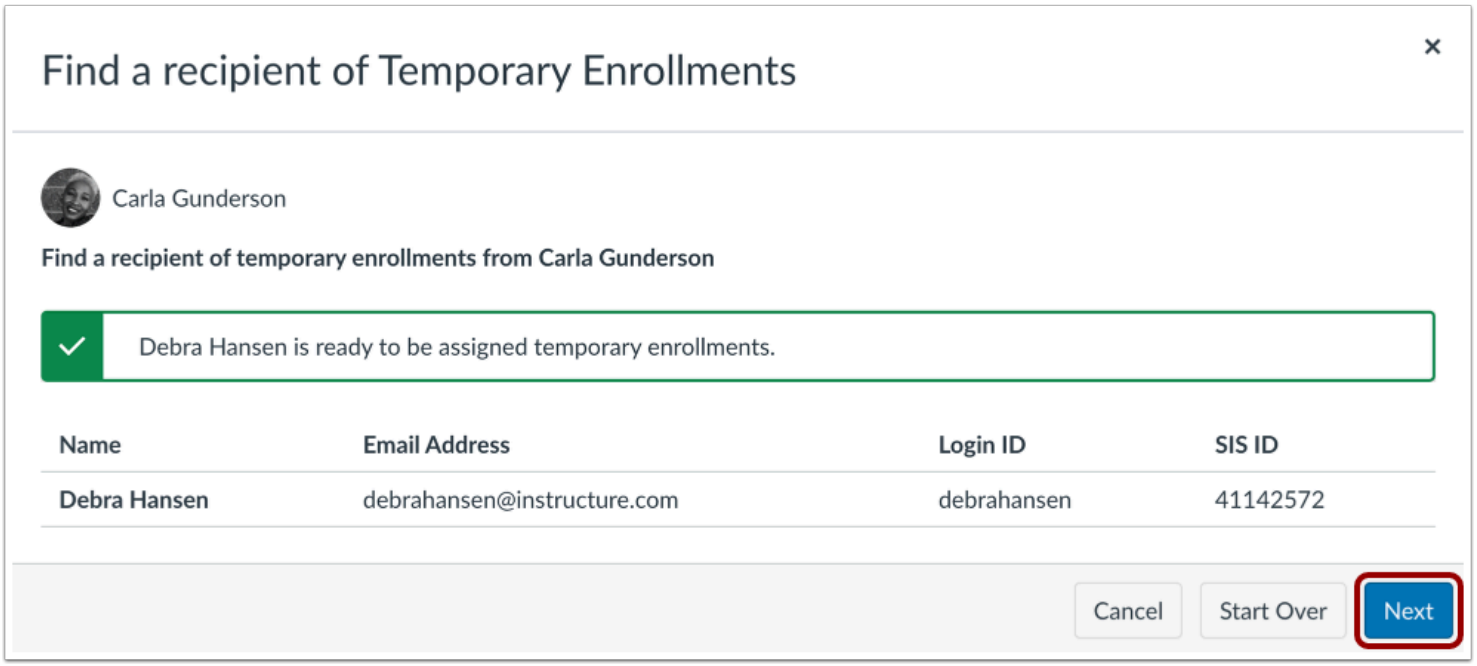


A temporary enrollment recipient is a user who receives access to a user's courses. To find a recipient of temporary enrollments for a user, search for a user by Email Address, Login ID or SIS ID [1]. Then click the **Next** button [2].

Notes:

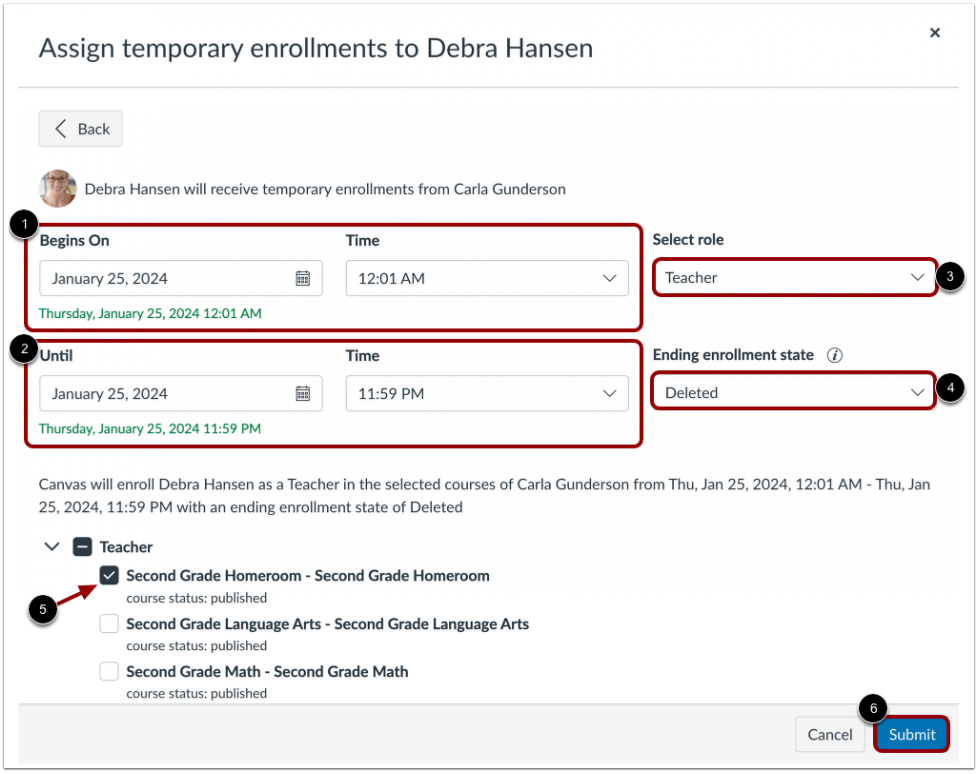
- Depending on your institution's preferences, some 'Add recipient by' options may not be available.
- An error message displays when the required information is missing [3].

Confirm Recipient of Temporary Enrollments



Click the **Next** button.

Assign Temporary Enrollments



Add the date and time the recipient should receive access to the course(s) using the **Begins On** and **Time** fields [1]. Add the date and time the recipient's access should end using the **Until** and **Time** fields [2].

To select the user's role, click the **Select role** drop-down menu [3].

By default, when a temporary enrollment ends, the enrollment is deleted. To select a different ending enrollment state, click the **Ending enrollment state** drop-down menu [4].

By default, active and published courses where the Provider has an Instructor-based role are selected. Click the checkbox next to each course(s) the recipient should have access to [5].

Click the **Submit** button [6].

Notes:

- The time and role fields are stored in local browser storage and display the most recent selections in new workflows until the local browser storage is cleared.
- Temporary enrollment recipients are restricted to the same course section(s) as the provider.
- Temporary enrollments are not available for concluded courses.

- When enrolling a recipient with more permissions than the provider in a course, a tooltip states that the recipient will have different permissions than the provider in the enrolled course.
- When creating a temporary enrollment pairing from a provider in a sub-account, only courses within the sub-account hierarchy are available. To pair additional courses, you must create the temporary enrollment pairing from within the sub-account or root account that contains the courses.
- When there are missing or incorrect details in the required fields, an error message displays in the respective section.

View Temporary Enrollments

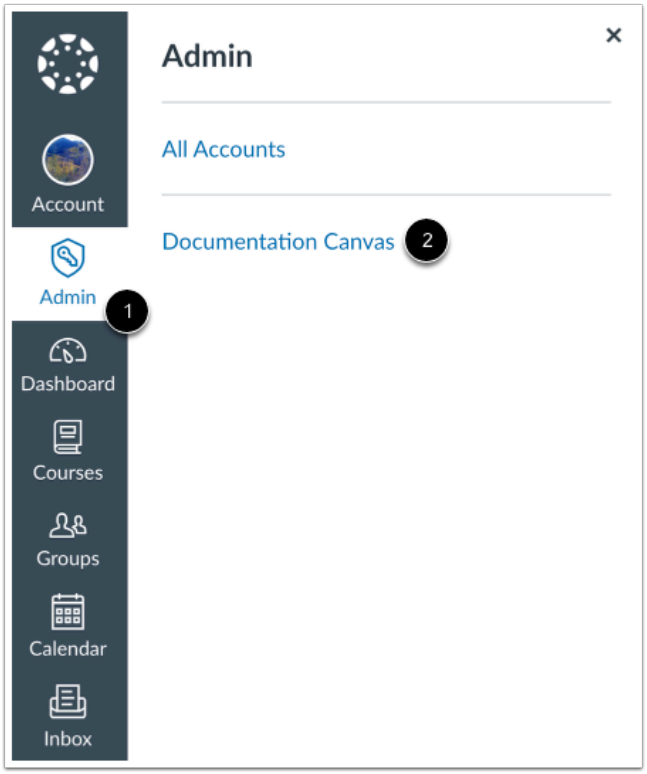


Once a temporary enrollment is submitted, a banner displays showing the enrollment was successfully completed [1]. Additionally, the Temporary Enrollment icon displays solid to represent an active pairing [2].

How do I manage temporary enrollments in an account?

After adding temporary enrollment pairings, you can manage the enrollments in your account.

Open Account



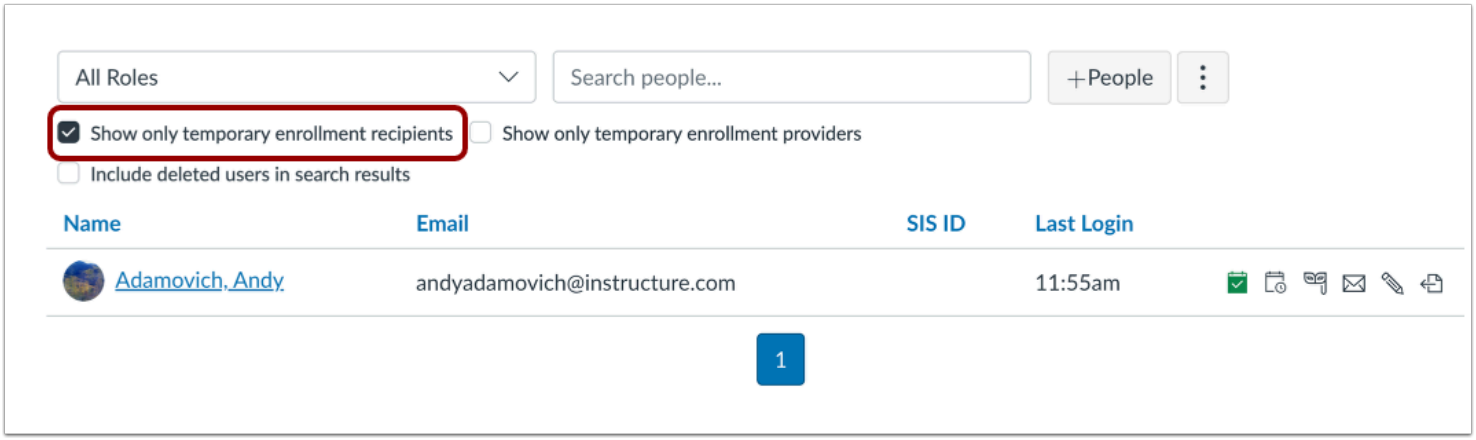
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



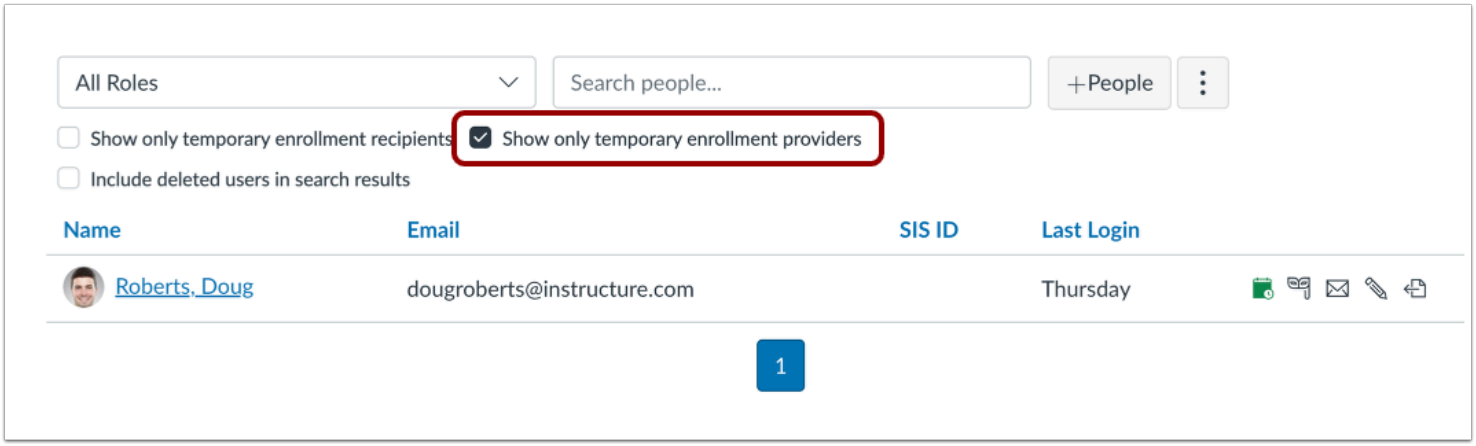
In Account Navigation, click the **People** link.

Filter by Temporary Enrollment Recipients



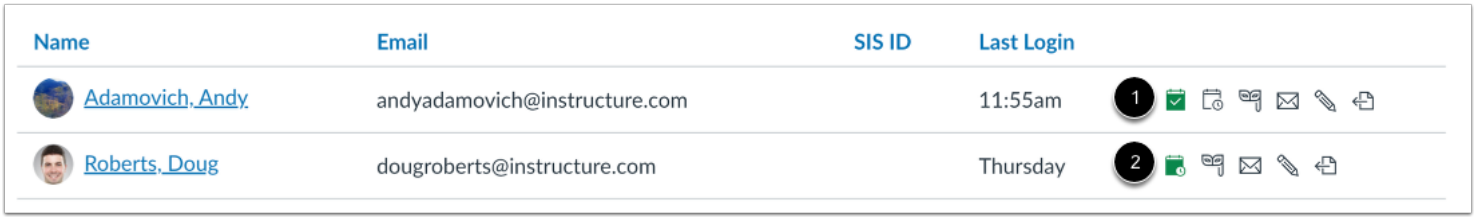
To filter by temporary enrollment recipients, click the **Show only temporary enrollment recipients** checkbox.

Filter by Temporary Enrollment Providers



To filter by temporary enrollment providers, click the **Show only temporary enrollment providers** checkbox.

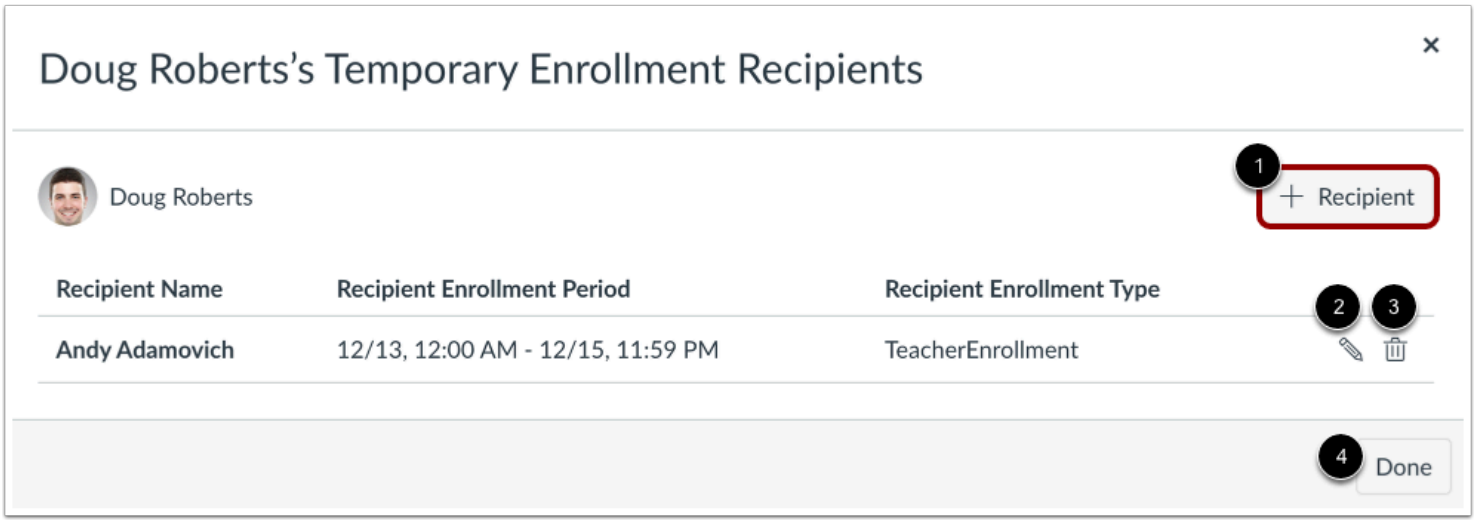
Manage Temporary Enrollments



To manage a user's Temporary Enrollment Providers, click the **Manage Temporary Enrollment Providers** icon [1]. To manage a user's Temporary Enrollment Recipients, click the **Manage Temporary Enrollments Recipients** icon [2].

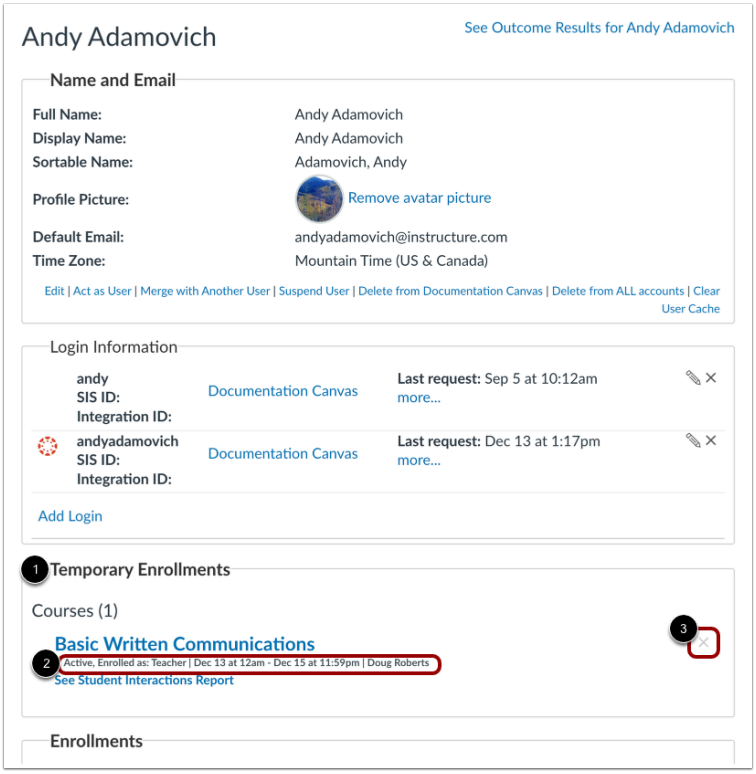
Note: A user can be both a provider and a recipient, if desired.

View User's Temporary Enrollments Recipients



When managing a user's temporary enrollments, you can add a recipient [1], edit a recipient [2], or delete a recipient [3]. Then, click the **Done** button [4].

View User Details Page



On the user's page, a Temporary Enrollments section displays courses the user is temporarily enrolled in [1]. The details related to the time frame and role are also displayed [2].

Individual enrollments can be deleted by clicking the **Remove** icon [3].

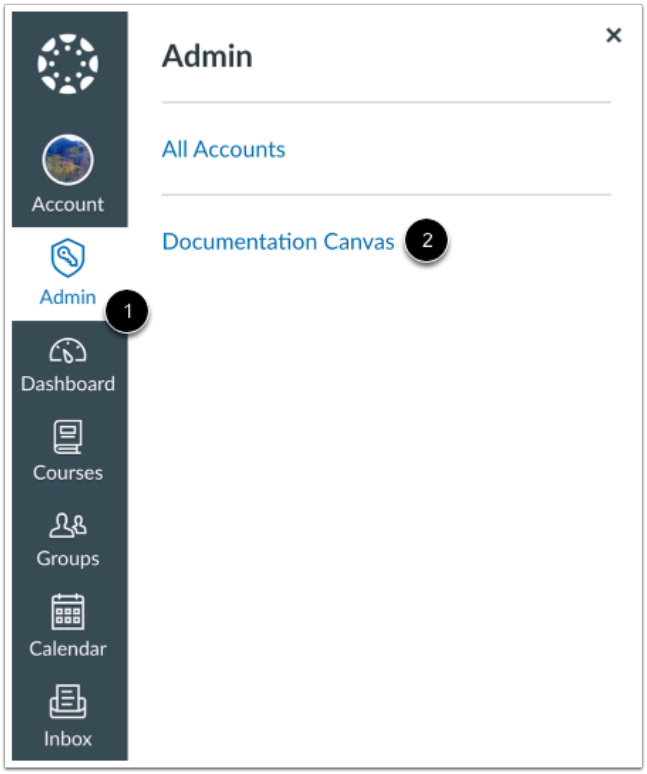
Note: Temporary enrollment recipients are restricted to the same course section(s) as the provider.

How do I send a message to a user in an account?

You can view a user in your account and send a message to the user.

The message link connects to your Inbox, which you can also use to message a user directly.

Open Account



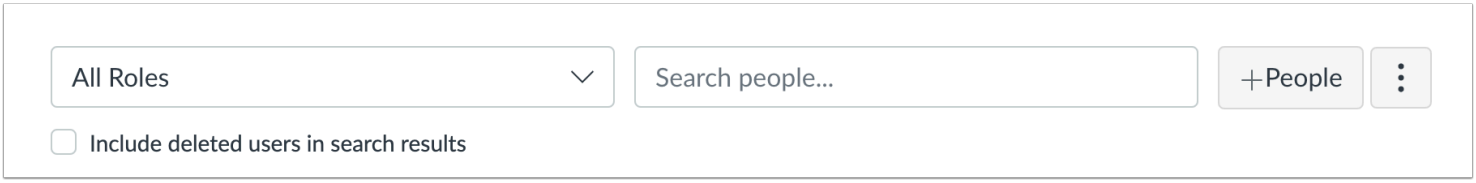
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



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

Find User



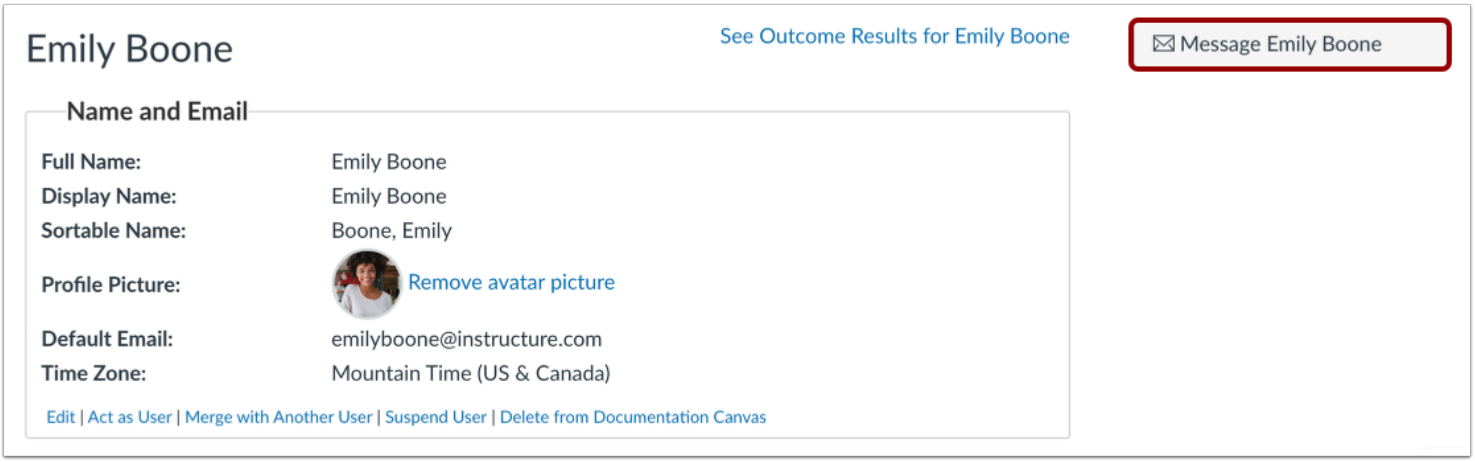
Use the filter and search options to find the user in the account.

Open User Profile



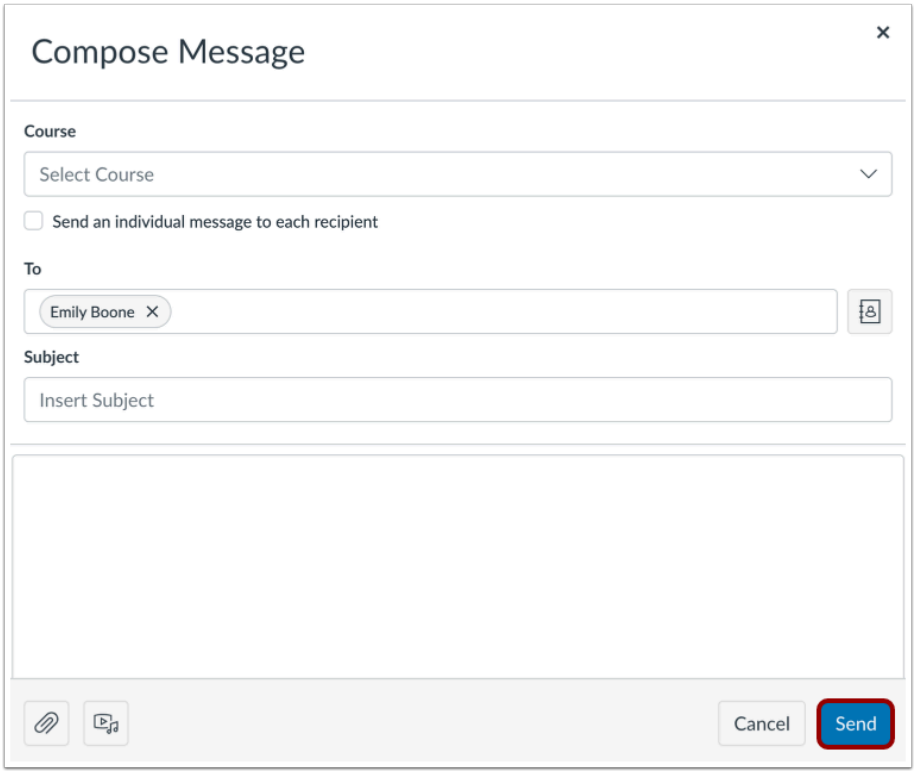
In the search results, click the user's name.

Message User



Click the **Message [User Name]** button.

Send Message



Canvas redirects you to the Inbox, where you can compose your message to the student.

When you are finished, click the **Send** button.

How do I view the enrollments for a user in an account?

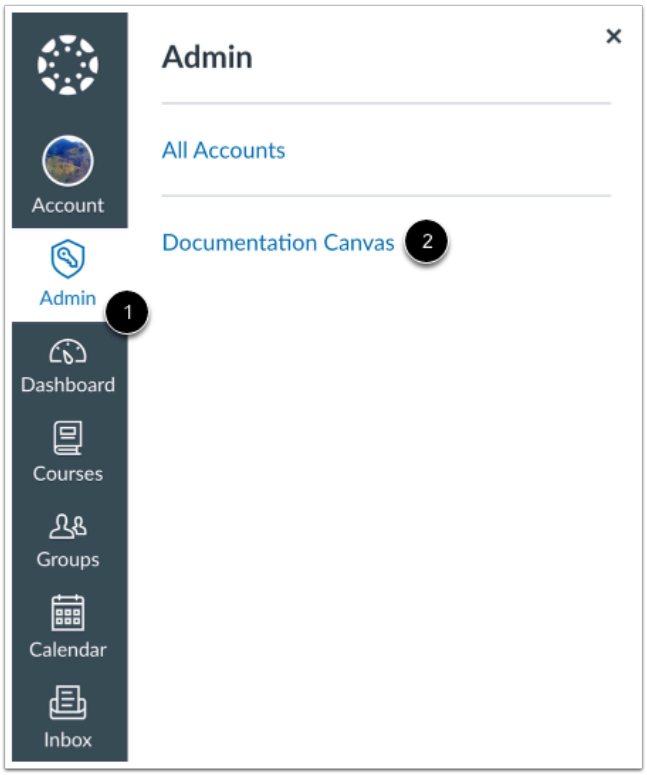
As an admin, you can view all course, group, and account enrollments for a user in your account.

This page also allows you to quickly unenroll a user from any course, group, or account if necessary. At the account level, unenrolling a user from a course or group has the same result as removing an enrollment in a course, except you can unenroll the user from multiple courses or groups at once.

Enrollments are commonly managed automatically in Canvas through student information system CSV files. However, if your instructors have permission to add or remove users, enrollments can be managed manually by a course instructor.

Note: SIS enrollment CSV files that include start_date and end_date values override term dates, course dates, and section dates.

Open Account



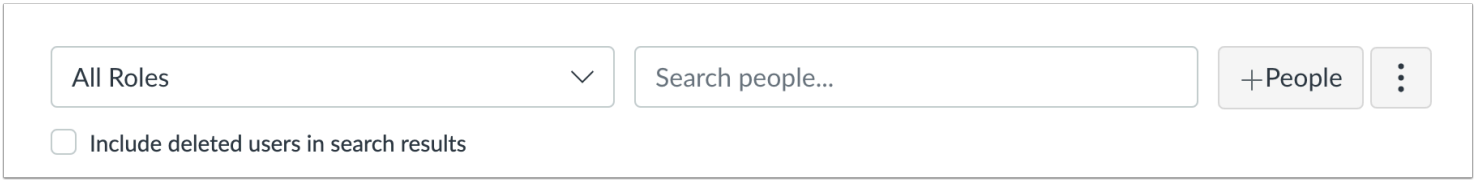
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



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

Find User



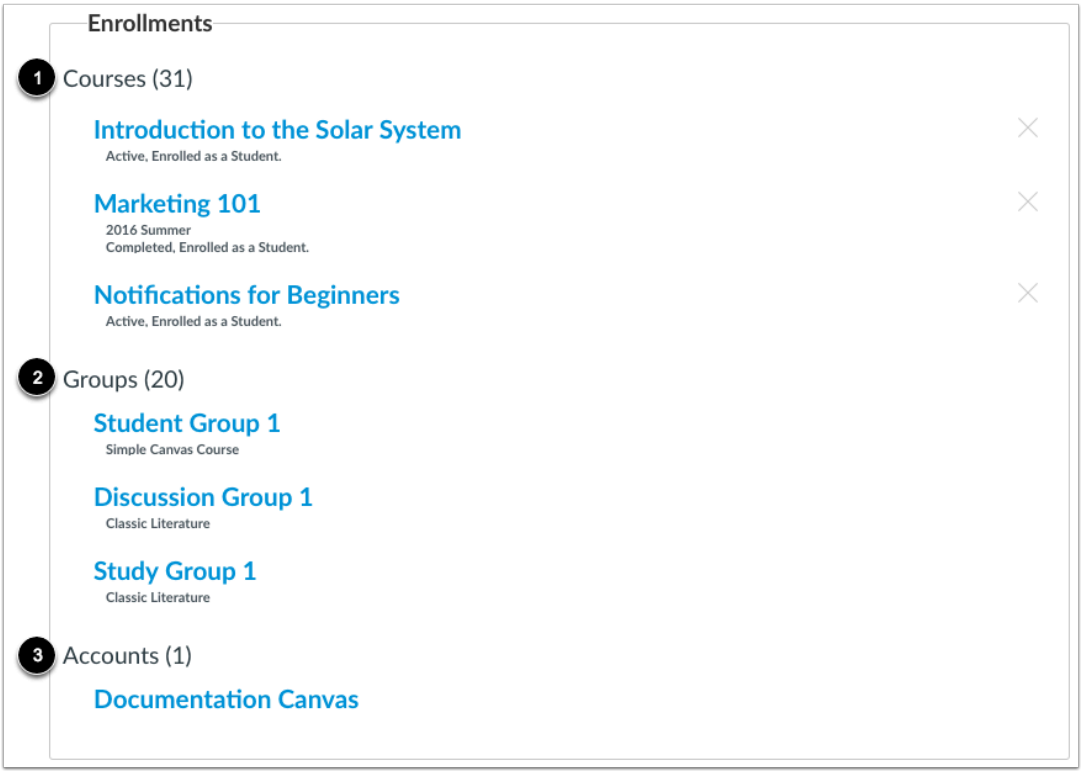
Use the filter and search options to find the user in the account.

Open User Profile



In the search results, click the user's name.

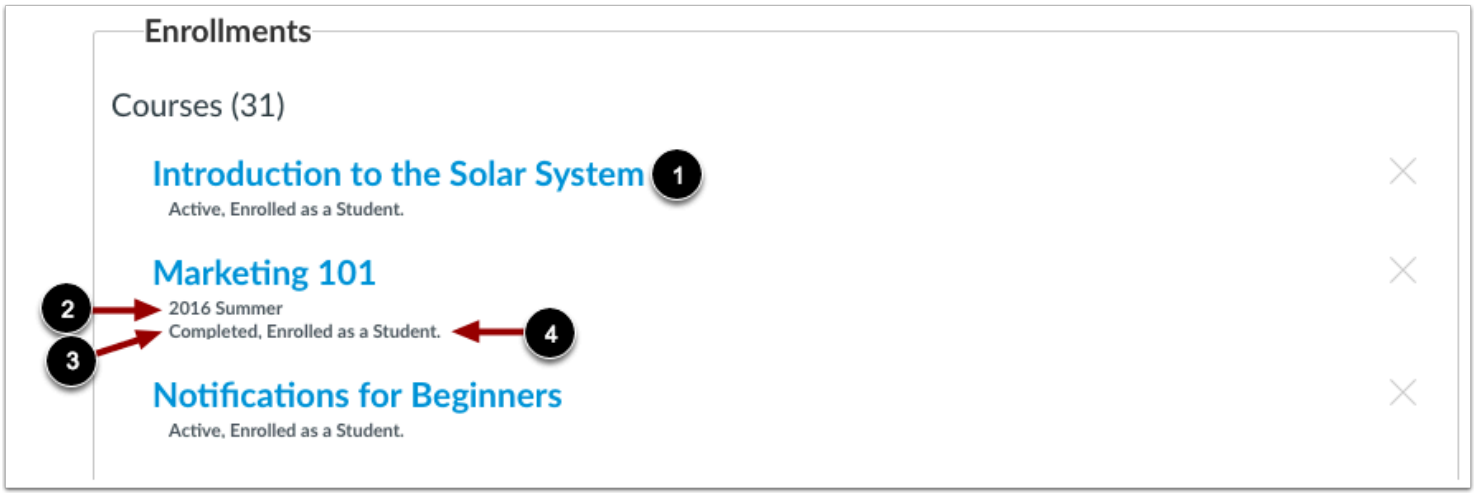
View Enrollments



Enrollments are located in the **Enrollments** section. Enrollments are separated into courses [1] and groups [2].

If a user has been added to an account, the Enrollments section will also display a list of accounts where the user resides [3].

View Course Details

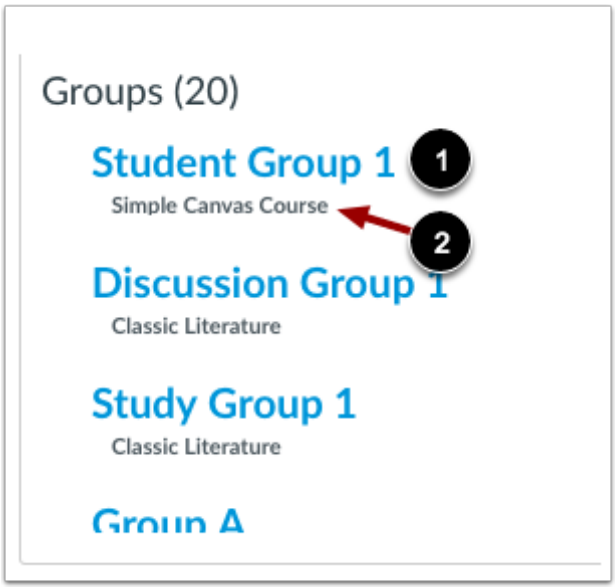


The Courses section shows all courses where the user is enrolled.

Each course includes the course name [1], the term where the course resides [2], the user's enrollment status [3], and the user's role [4].

To access the course, click the name of the course.

View Group Details



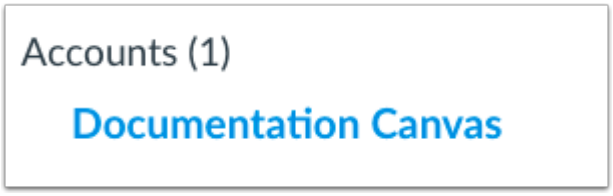
The Groups section shows all groups where the user is enrolled.

Each group includes the group name [1] and the name of the course or account where the group resides [2].

To access the group, click the name of the group.

Note: To unenroll a user from a group, you must open the account or course and manage the user's enrollment.

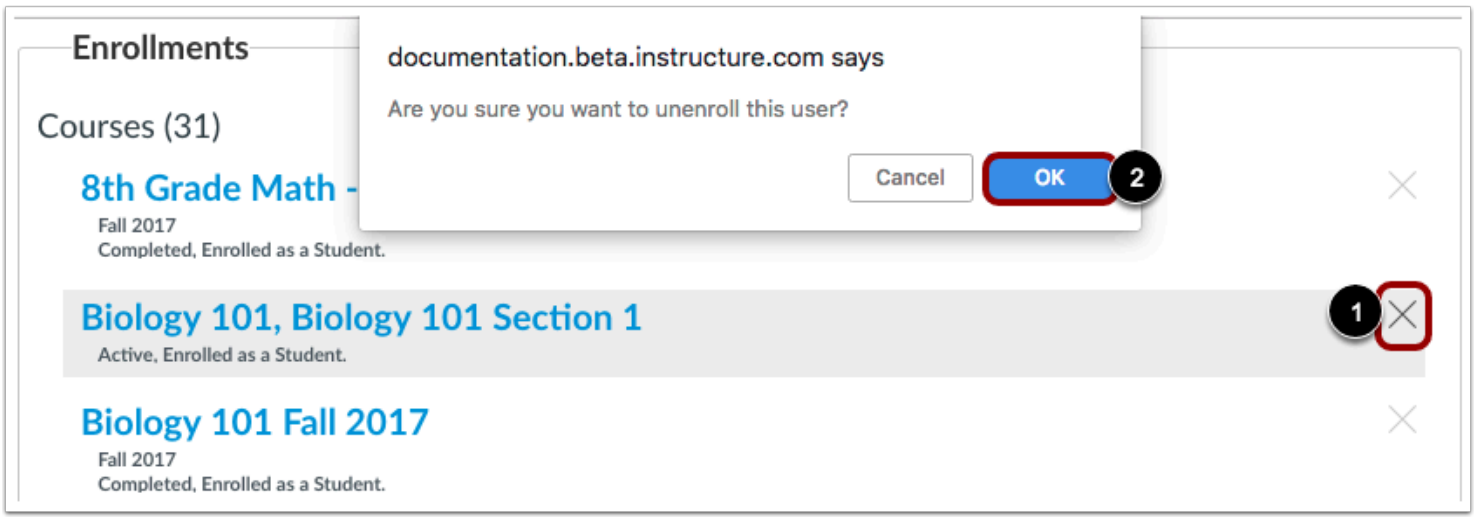
View Account Details



The Accounts section shows all accounts where the user is enrolled as an account admin.

To access the account, click the name of the account.

Unenroll User



To unenroll a user from a course, locate the appropriate section in the enrollments list. Next to the course, group, or account where you want to unenroll the user, click the **Delete** icon [1], then click the **OK** button [2]. The user will no longer have access to the course.

How do I view the page views for a user in an account?

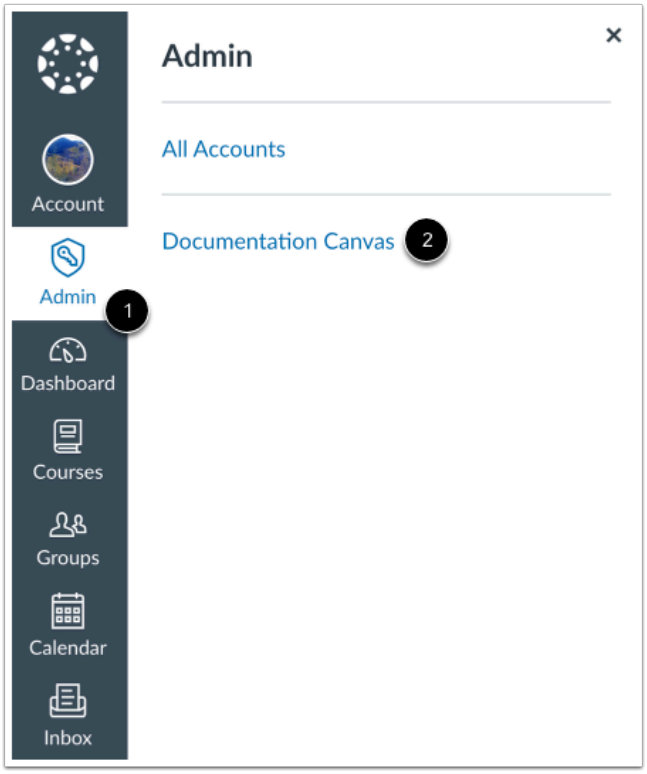
You can view the page views for a user in your account. You can also download page views as a CSV file.

The Page Views section only displays user data for the last 365 days.

Notes:

- Viewing page views is an account permission. If you cannot view page views, your institution has restricted this feature.
- Because mobile page view data is based on device settings and network connection, it may vary from the time the page views actually occurred. Page view data should not be used to assess academic integrity.
- The data is a best-effort attempt and is not guaranteed to be complete or entirely accurate. It is intended for use in rollups and aggregate analysis, rather than in isolation for auditing purposes or other high-stakes analyses involving individual users or small samples.
- Page Views data is generated from Canvas log files, not from a transactional database. As a result, data may be lost or duplicated at various points in the process—though such occurrences are uncommon.
- Additionally, due to the size of the data, our processes are designed to ensure that errors can be corrected at any time, with updates integrated as soon as they are identified and processed.

Open Account



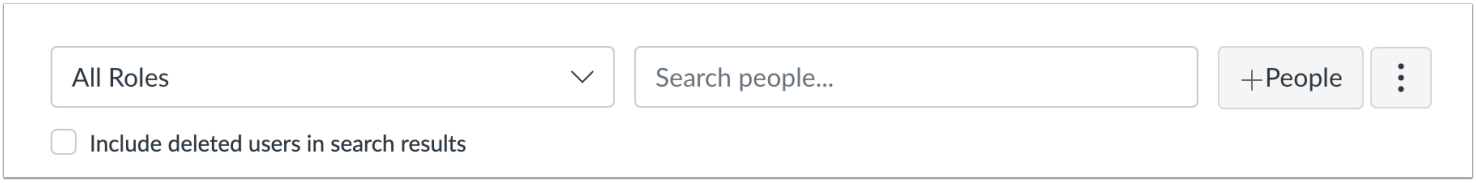
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



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

Find User



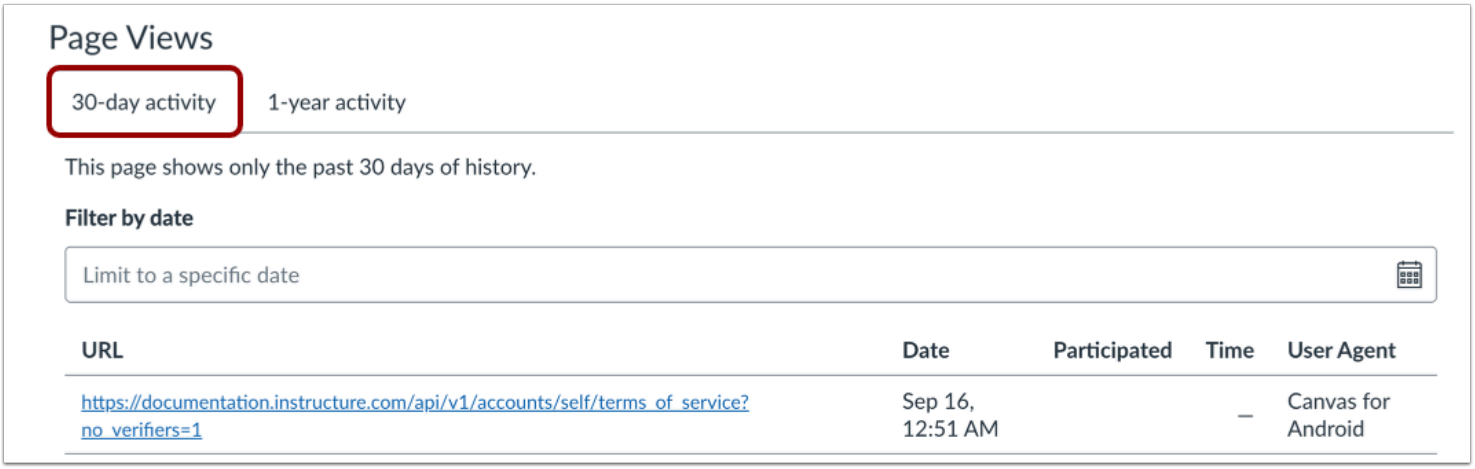
To find a specific user in the account, you can use the filter and search options.

Open User Profile



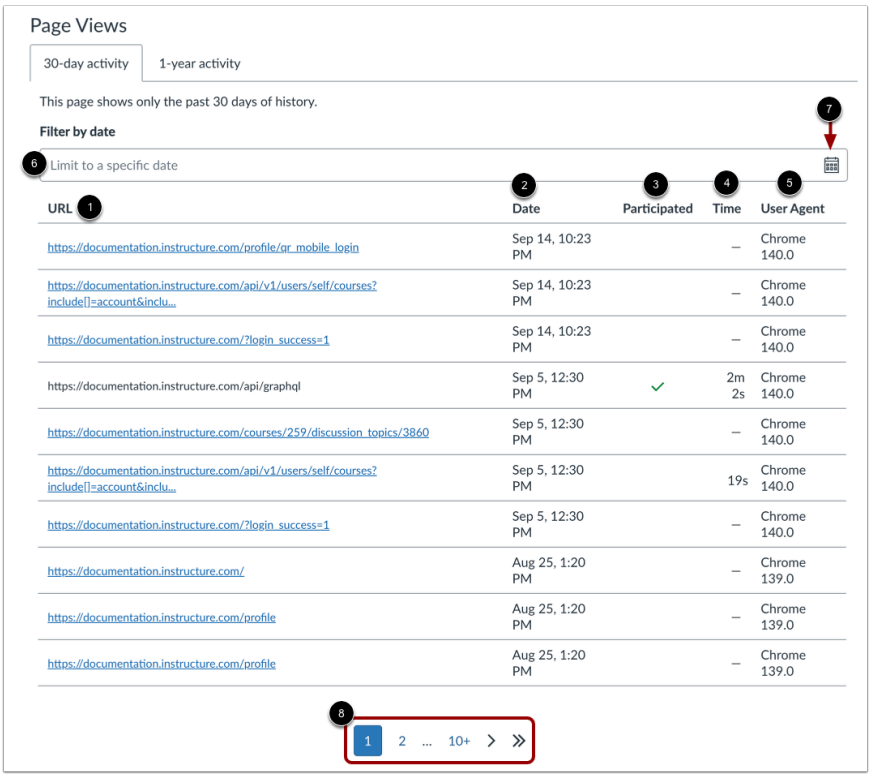
In the search results, click the user's name.

Locate Page Views Section



At the bottom of the User Details page, you can view the Page Views section. By default, the 30-day activity tab displays.

View 30-day Activity



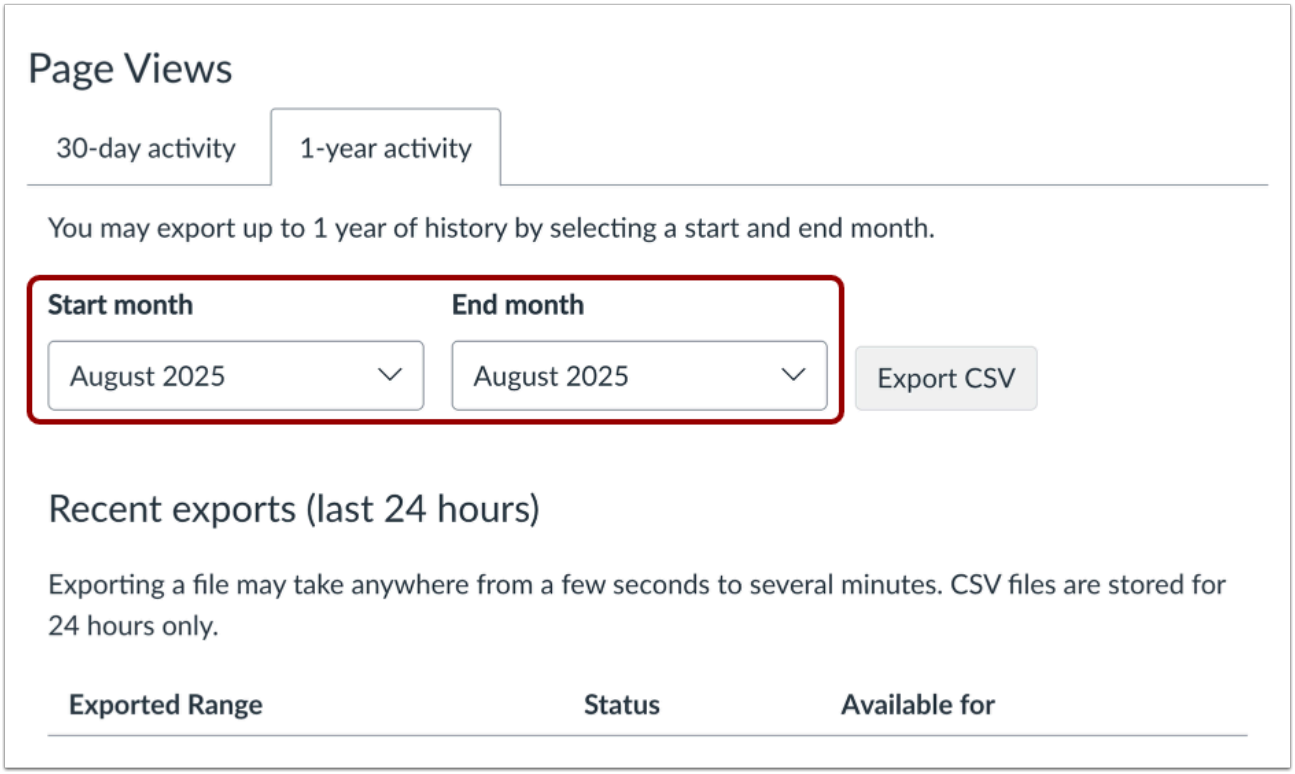
The table displays the following information:

- The URL the student viewed [1]
- The date the page was accessed [2]
- Whether the user participated in the page [3]
  - This column 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.
- The interaction time with the page [4]
  - This is calculated by counting 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.
- The user's browser agent [5]
  - In this column you can also see 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, helping differentiate between user access tokens and standard web sessions, and identifying the related developer key.

If you want to filter the page views by date, enter the date in the **Filter by date** field [6] or click the **Calendar** icon [7].

To view more items, click the page number or arrow icons [8].

View 1-year Activity

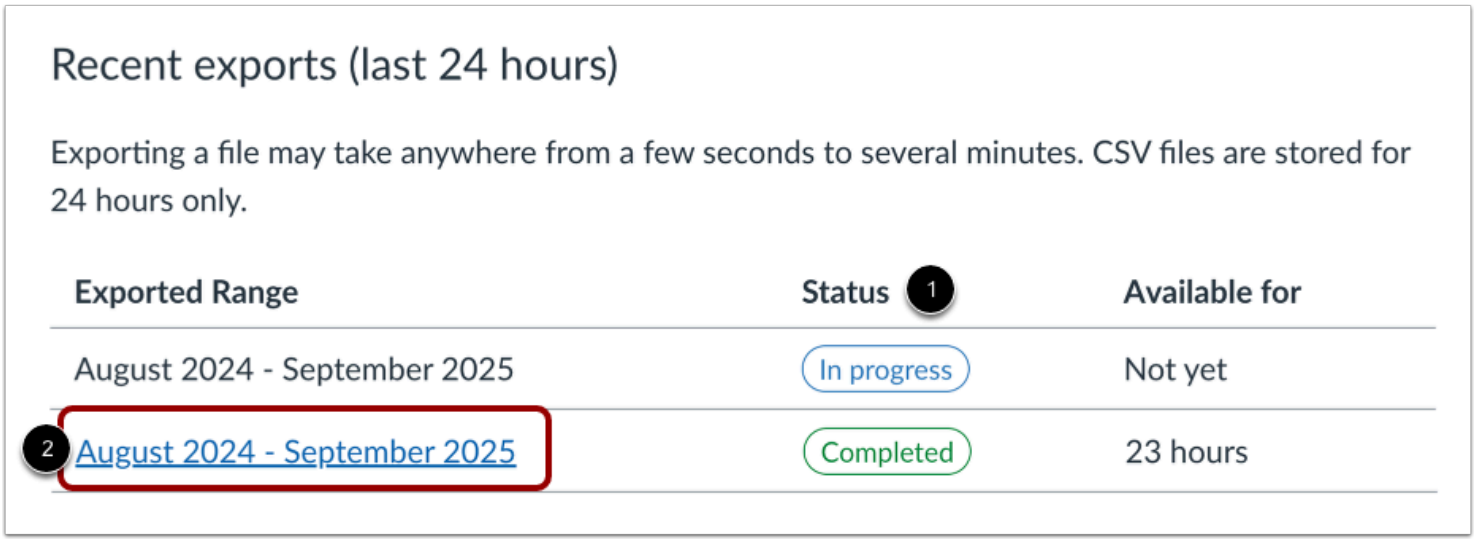


In the **1-year activity** tab [1], you can export up to one year of user activity.

Select a start and end month [2] and then click the **Export CSV** link [3].

Note: You can only request user history for one user at a time. Once the current file has been generated, you can submit a new request for that user.

Export User Activity



In the Recent exports section, you can view the export status [1]. To download the CSV file, click the file link [2]. Generated CSV files are available for download for up to 24 hours only.

For more detailed insights into student interaction, you can also view individual student analytics in a course.

Notes:

- The CSV file contains more data than what is shown in the **Page Views** window, including the **IP address** used for each page view.
- The Page Views CSV file contains information about user activity in Canvas. When an admin masquerades as a user, the `real_user_id` column displays the admin's User ID. A blank cell in this column indicates that the user was logged in.
- The Date column in Canvas is shown in the viewer's local time zone, while in the CSV file it is shown in UTC (Zulu).
- You can find the descriptions of Page Views CSV column headings in the Canvas Users API documentation.

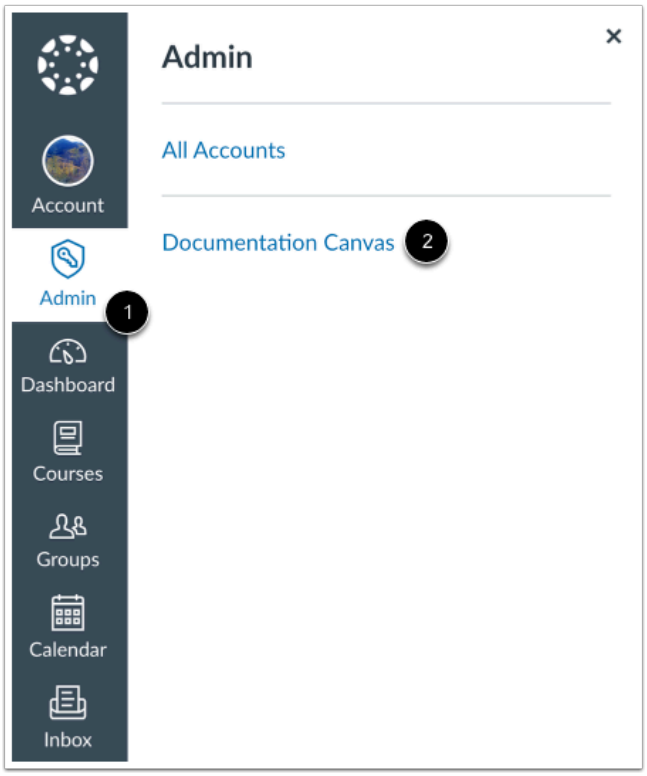
How do I manage profile pictures for users in an account?

If your account has enabled profile pictures for your users, you can manage all profile pictures for your account. Profile pictures are public and automatically approved when users upload an image in their settings. Using profile pictures can make it easier to see the users in your account and managing them gives you the ability to keep the pictures appropriate.

If Gravatars are enabled for an institution in account settings, and a user has a Gravatar but chooses not to upload a profile picture, the Gravatar will display for the user's profile picture.

If a student views another student's user details in a course and reports a profile picture as inappropriate, you can review those profile pictures and approve, lock, or delete the picture. In the courses, instructors can remove profile pictures completely from a user's details page.

Open Account



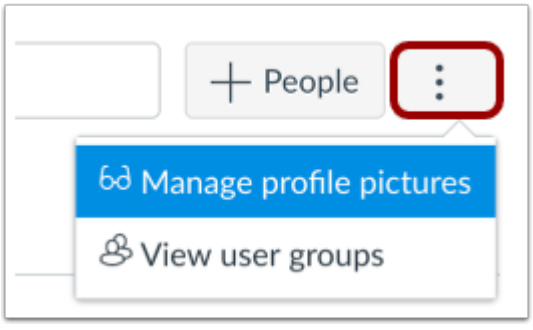
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



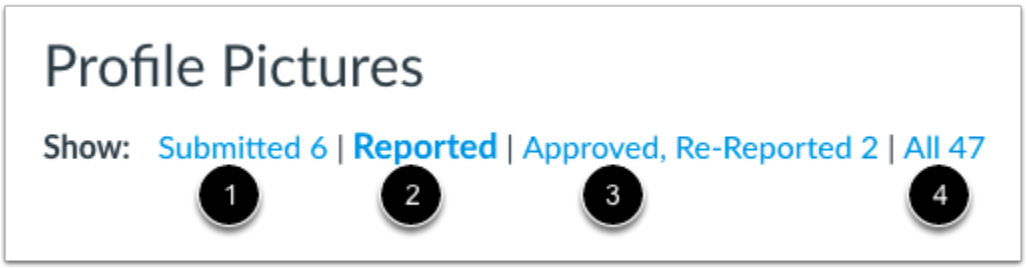
In Account Settings, click the **People** link.

Manage Profile Pictures



Click the **Manage Profile Pictures** link.

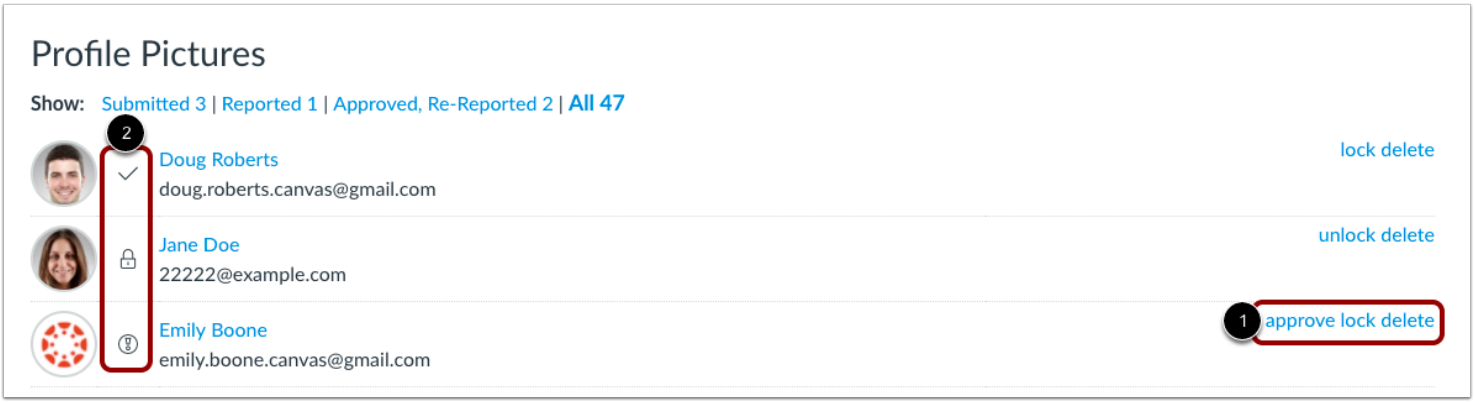
View Profile Pictures



You can view and filter profile pictures by the following categories:

- **Submitted** [1]: pictures that users have submitted but they haven't been approved or deleted
- **Reported** [2]**:** pictures that have been reported
- **Approved**, **Re-Reported** [3]**:** pictures that have been approved and re-reported
- **All** [4]: all the pictures within the account

Manage Profile Picture



Within each category, you can manage individual profile pictures with links to approve, lock, or delete the picture [1]. Locking the profile picture means the image is approved but the user cannot change the profile picture. Locked profile pictures can be unlocked at any time.

Each status (except submitted) includes an associated icon [2]:

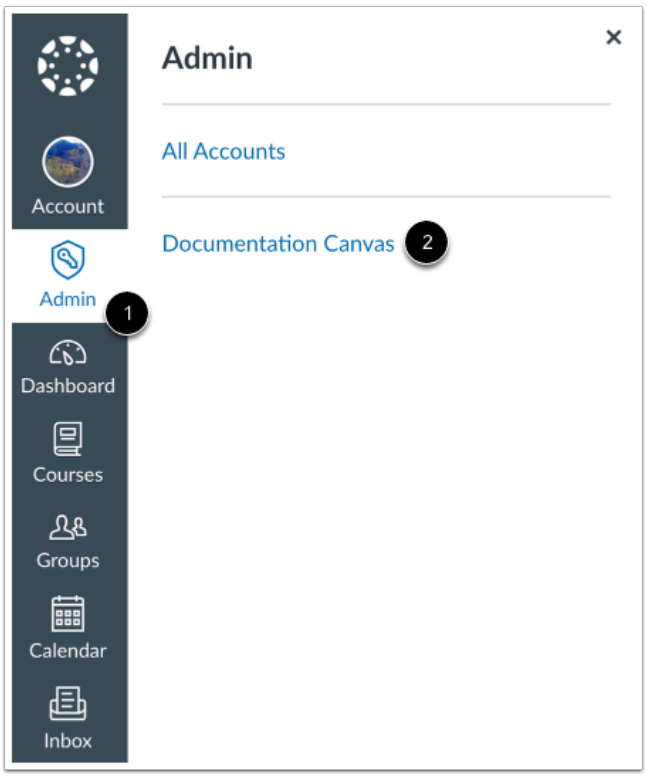
- approved profile pictures display a check mark
- locked profile pictures display a lock icon
- reported profile pictures display a warning icon

How do I view groups in an account?

You can view existing groups in your account. Viewing groups at the account level is similar to viewing groups at the course level. The groups created at the account level will still show up in the Groups menu in the Global Navigation menu.

Note: Viewing user groups is an account permission. If you cannot view user groups, your admin has restricted this option.

Open Account



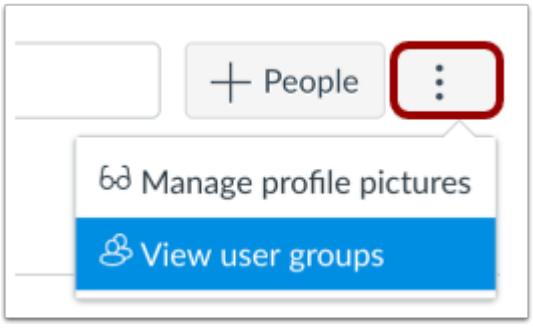
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



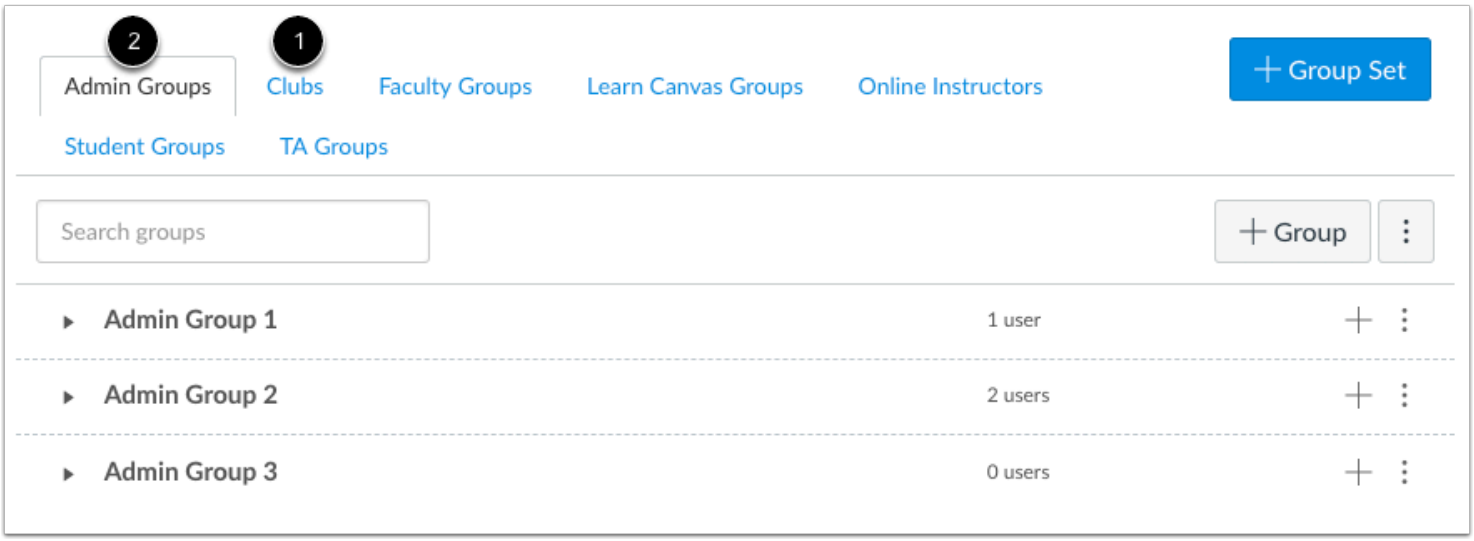
In Account Settings, click the **People** link.

View User Groups



Click the **View User Groups** link.

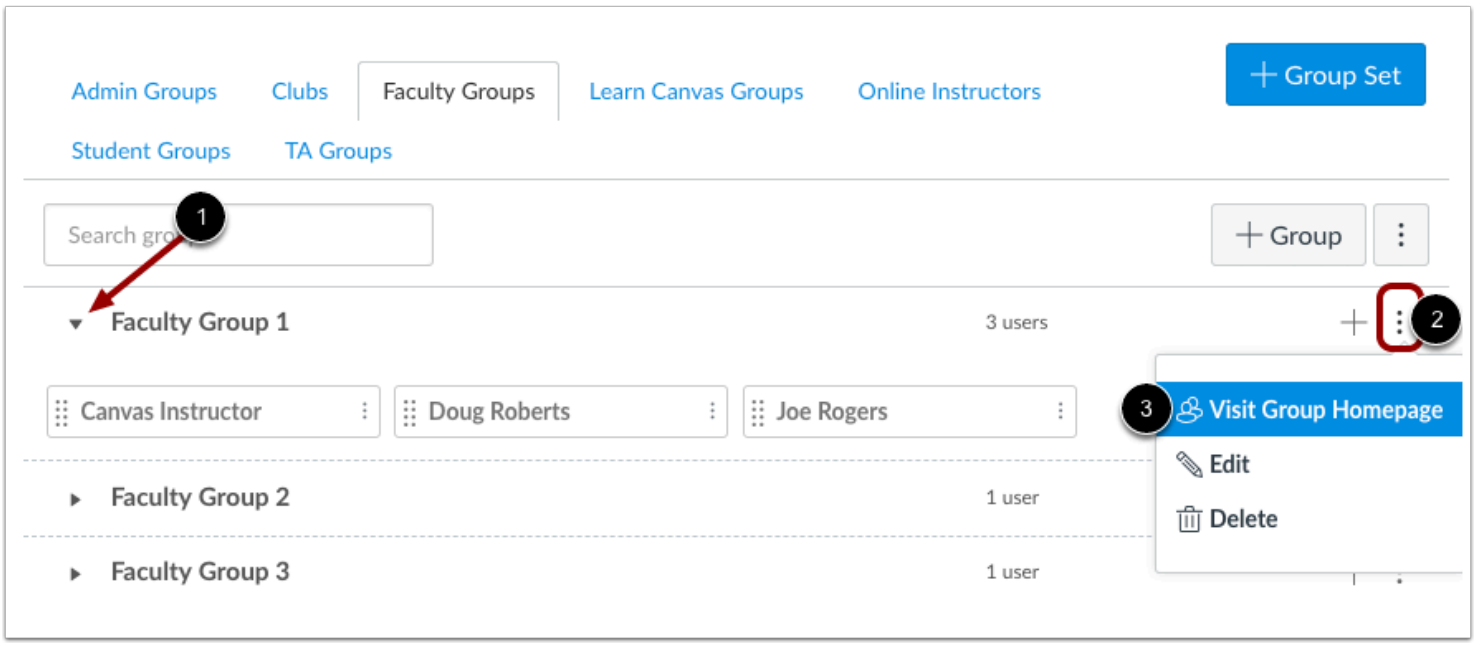
View Group Sets



Once you create a group set in your account, the group set displays as a tab for easy access to the group information [1]. You can also view a group set directly by clicking the name of the tab.

The highlighted tab shows which group set you are viewing [2]. Click any tab to view another group set.

View Groups

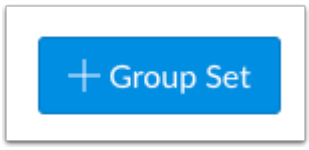


When you created the group set, you also created groups, either manually or automatically.

By default, all groups are collapsed in the page. You can expand each group and see which students are assigned to each group in the group set, if any, by clicking the arrow next to the group name [1].

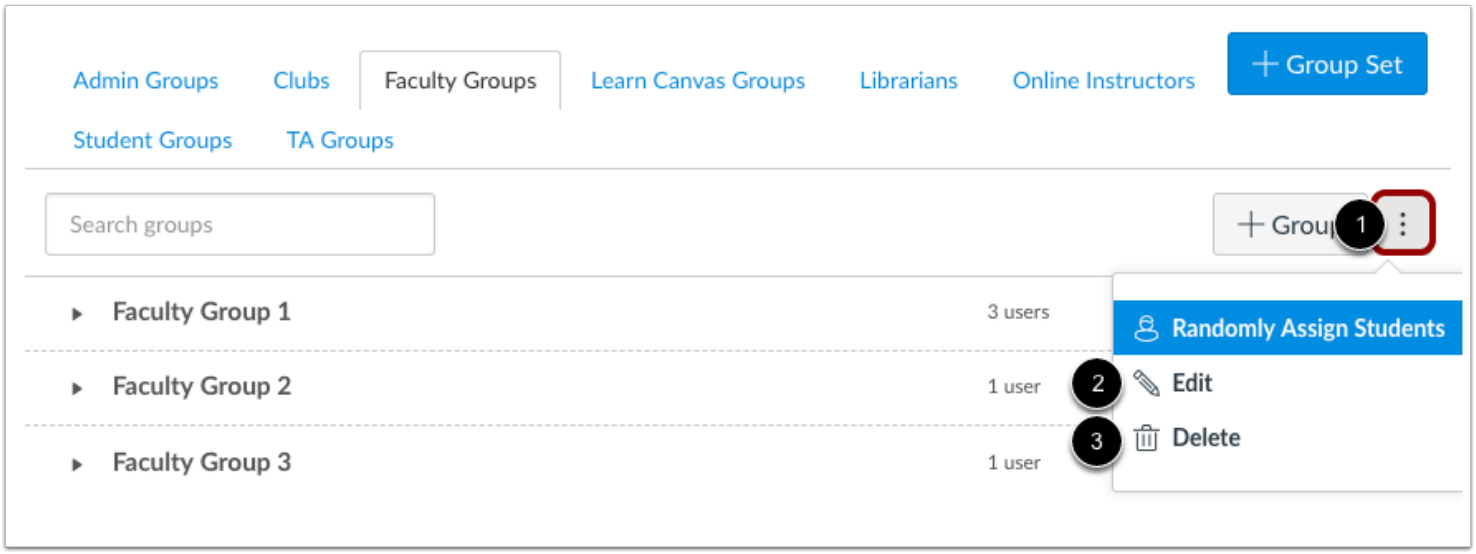
Once users are participating in a group, you can view their activity within a group by clicking the group **Options** icon [2] and selecting the **Visit Group Homepage** link [3].

Add Group Set



To add a group set, click the **Add Group Set** button.

Manage Group Set



To manage a group, click the group **Options** icon [1].

To edit the name of the group, click the **Edit** link [2]. To delete the group, click the **Delete** link [3].

Note: Currently the Randomly Assign Students link is not supported in account groups. All users must be added manually to each group.

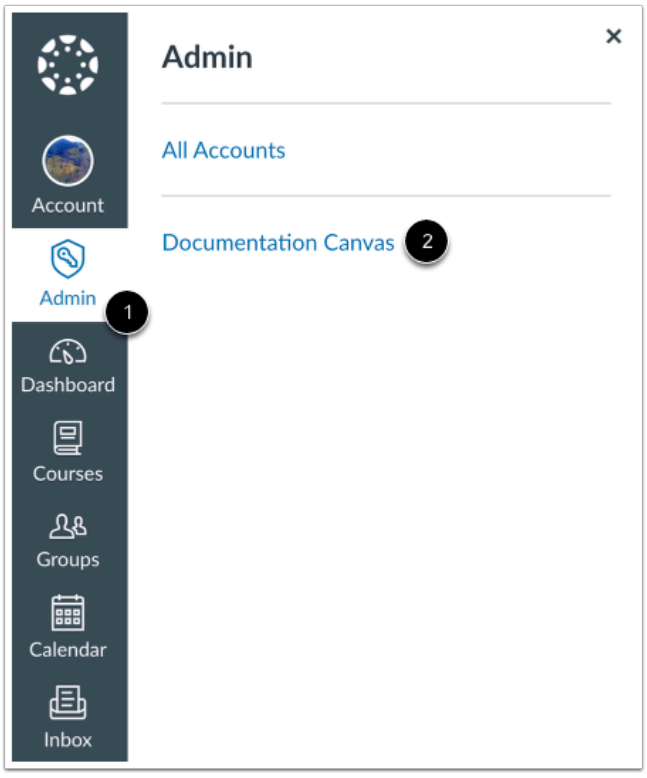
How do I add groups in a group set in an account?

Creating groups at the account-level is similar to viewing groups at the course-level. The groups created at the account-level will still show up in the Groups Menu in Global Navigation. You can also create groups at the sub-account level.

Notes:

- Viewing user groups is an account permission. If you cannot view user groups, your admin has restricted this option.
- Setting up groups for the purposes of collaboration is better handled through building courses or groups under the appropriate sub-account level, since you can't assign non-admins to sub-accounts.

Open Account



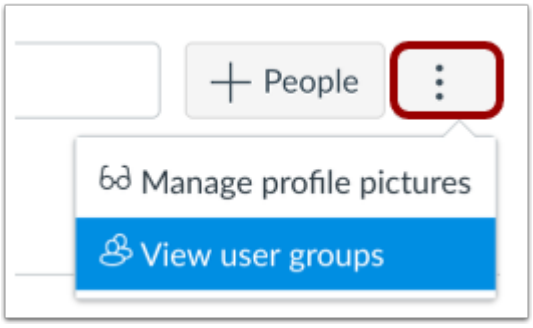
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



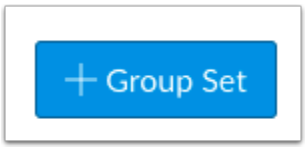
In Account Settings, click the **People** link.

View User Groups



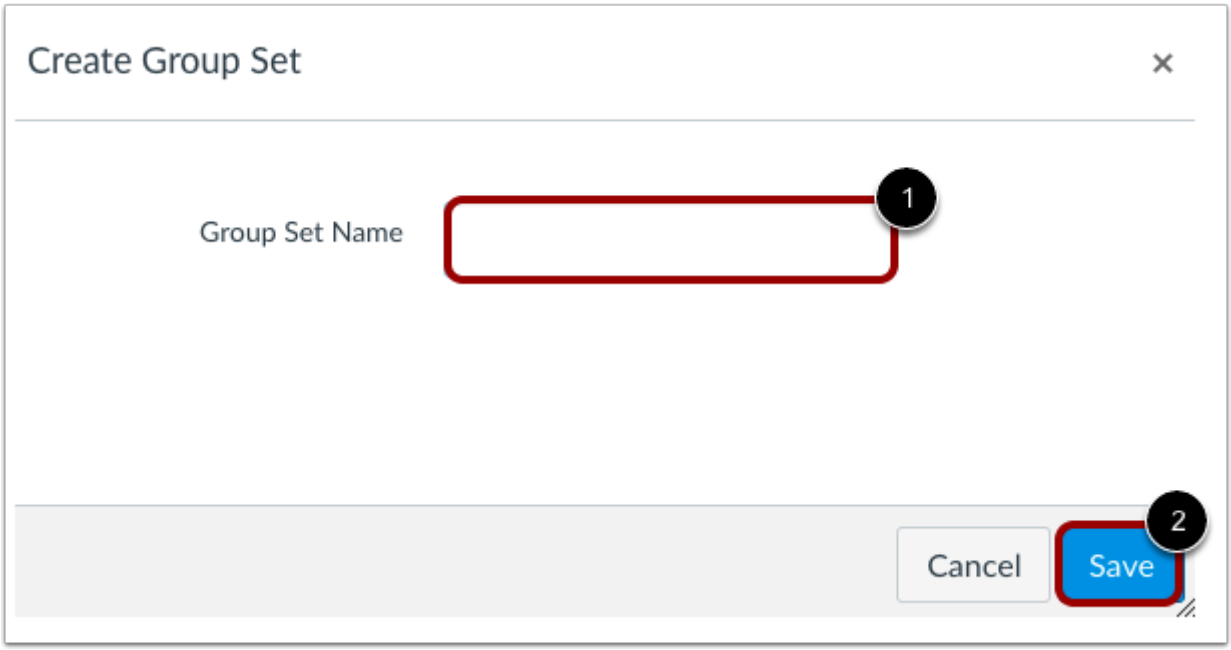
Click the **View User Groups** link.

Add Group Set



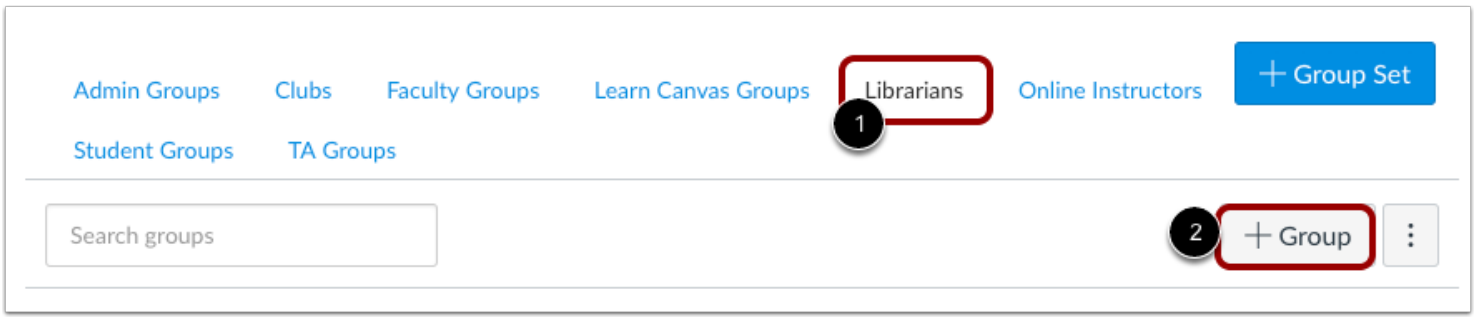
Click the **Add Group Set** button.

Create Group Set



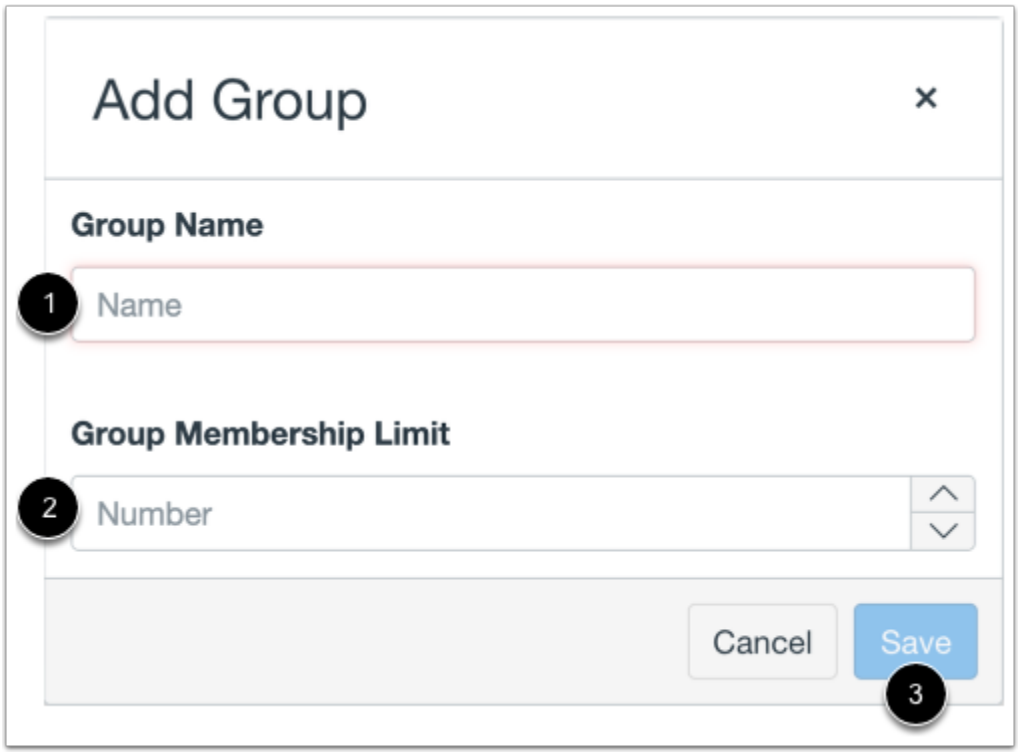
In the **Group Set Name** field [1], enter a name for the group. Click the **Save** button [2].

Add Group



In the new group set [1], click the **Add Group** button [2].

Create Group



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 **Group Membership Limit** field [2]. To save the group, click the **Save** button [3].

View Group



View the group in your group set.

To create another group, click the **Add Group** button.

How do I moderate ePortfolios as an admin?

As an admin, you can moderate ePortfolios in your account. The ePortfolio Moderation page displays any ePortfolio identified by Instructure as possible spam. You can verify these ePortfolio as spam or mark them as safe. Marking an ePortfolio as spam or safe applies that status to the entire ePortfolio.

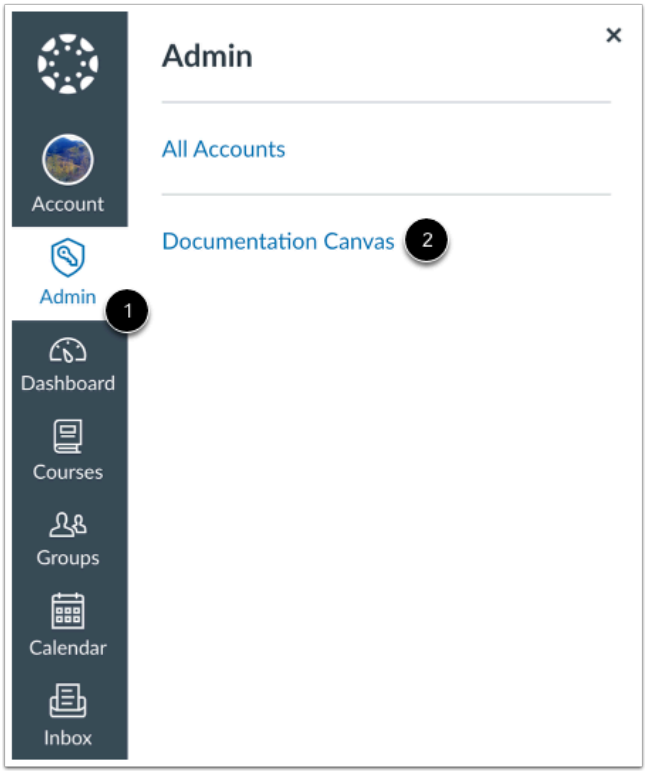
The ePortfolio Moderation page also displays all spam ePortfolios in your account as well as safe ePortfolios authored by users who also authored ePortfolios that are currently marked as spam.

Any ePortfolio that is flagged as possible spam by Instructure or marked as spam by a Canvas admin will only be visible to the author and admins. Authors cannot edit ePortfolios that are flagged or marked as spam. If a user's ePortfolio has been marked as spam, the user will also no longer be able to create new ePortfolios.

Notes:

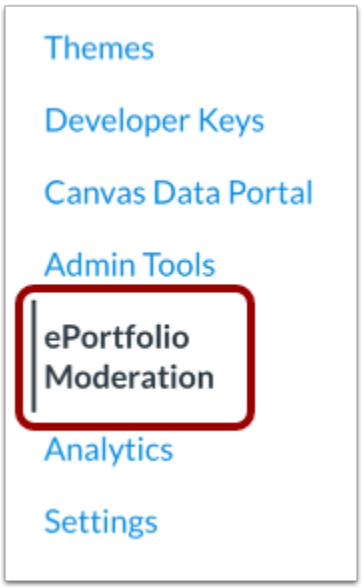
- Admin ePortfolio moderation is an account-level permission. To moderate ePortfolios, the Users - Moderate Content permission must be enabled.
- Removing users via SIS upload does not delete their associated ePortfolios. However, deleting a user account in your Canvas account also deletes their associated ePortfolio.

Open Account



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

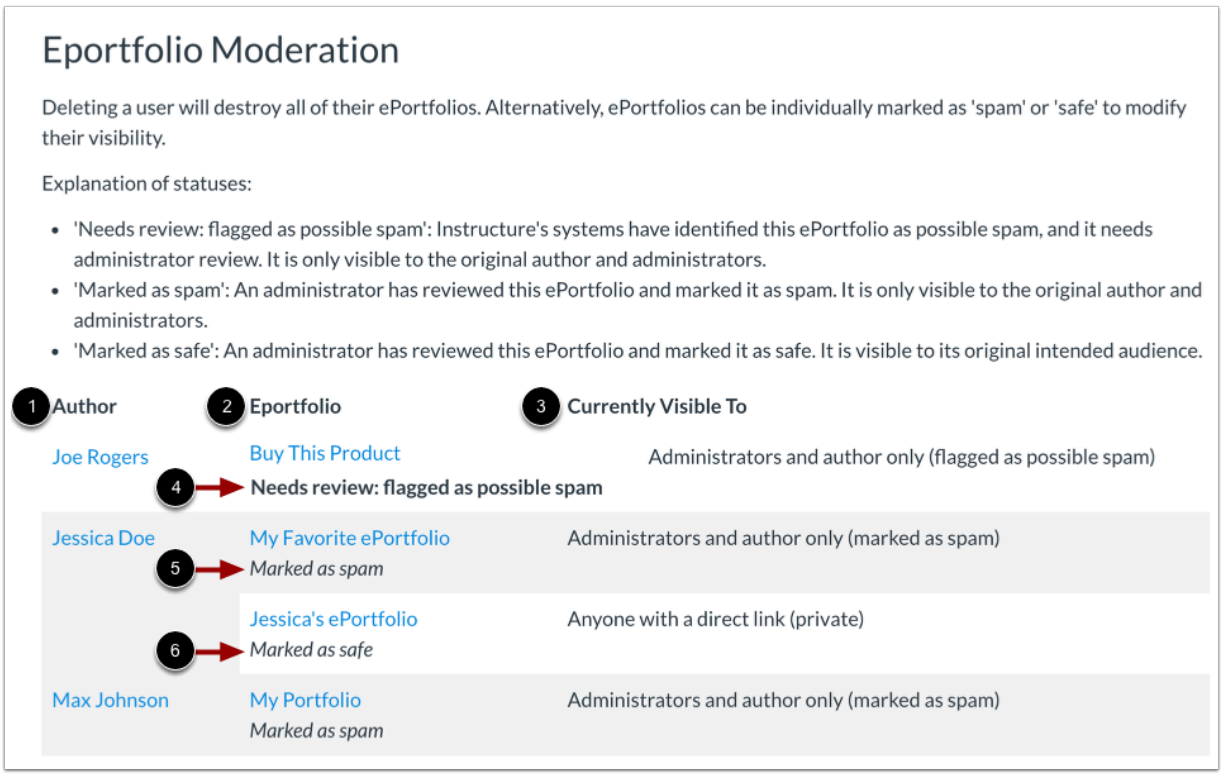
Open ePortfolio Moderation



In Account Navigation, click the **ePortfolio Moderation** link.

Note: The ePortfolio Moderation link is only visible to admins with the Users - Moderate Content permission.

View ePortfolio Moderation

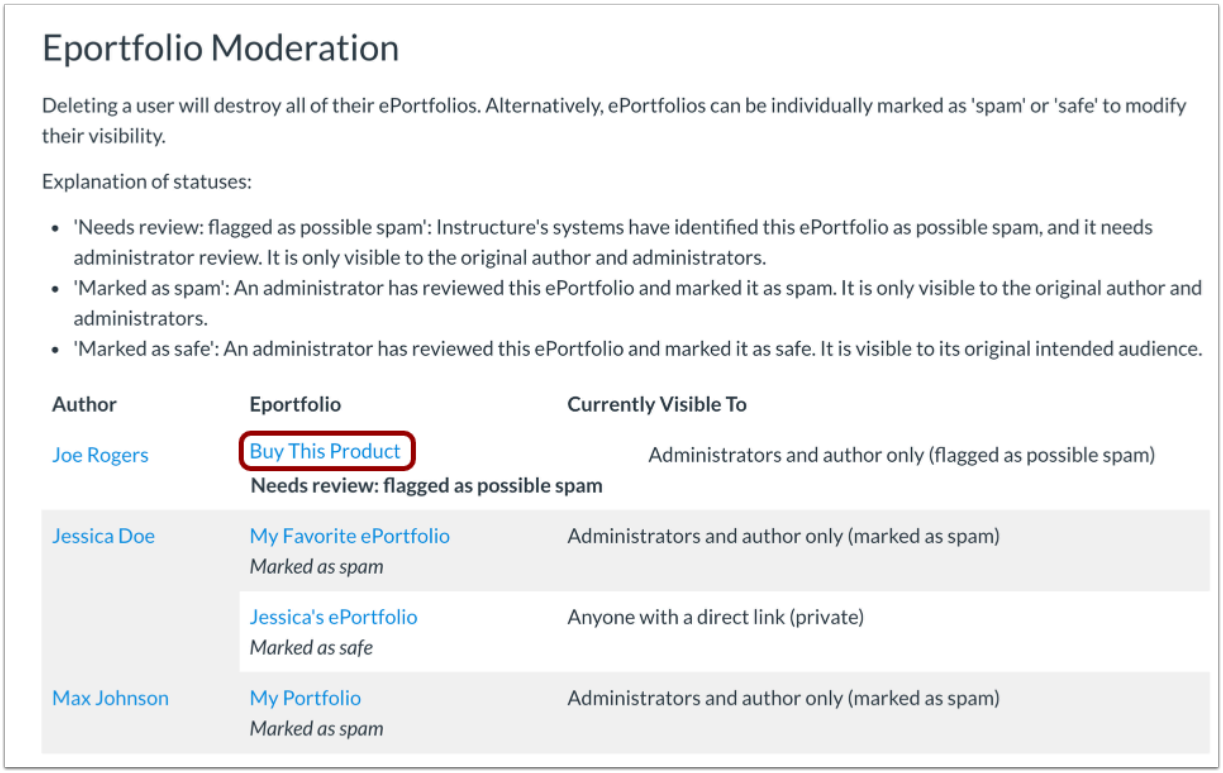


From the ePortfolio Moderation page, you can manage ePortfolios in your account that have been identified as spam. Each ePortfolio displays the author [1], name [2], visibility status [3], and moderation status. ePortfolios will have one of the following moderation statuses:

- **Needs review: flagged as possible spam** [4] - Instructure's systems have identified this ePortfolio as possible spam and it needs administrator review. It is only visible to the original author and administrators.
- **Marked as spam** [5] - An administrator has reviewed this ePortfolio and marked it as spam. It is only visible to the original author and administrators.
- **Marked as safe** [6] - An administrator has reviewed this ePortfolio and marked it as safe. It is visible to its original intended audience.

Note: ePortfolios marked as safe only display on this page if the ePortfolio is part of an author's account with at least one ePortfolio marked as spam and all ePortfolios have not yet been resolved.

Review ePortfolio



Eportfolio Moderation

Deleting a user will destroy all of their ePortfolios. Alternatively, ePortfolios can be individually marked as 'spam' or 'safe' to modify their visibility.

Explanation of statuses:

- 'Needs review: flagged as possible spam': Instructure's systems have identified this ePortfolio as possible spam, and it needs administrator review. It is only visible to the original author and administrators.
- 'Marked as spam': An administrator has reviewed this ePortfolio and marked it as spam. It is only visible to the original author and administrators.
- 'Marked as safe': An administrator has reviewed this ePortfolio and marked it as safe. It is visible to its original intended audience.

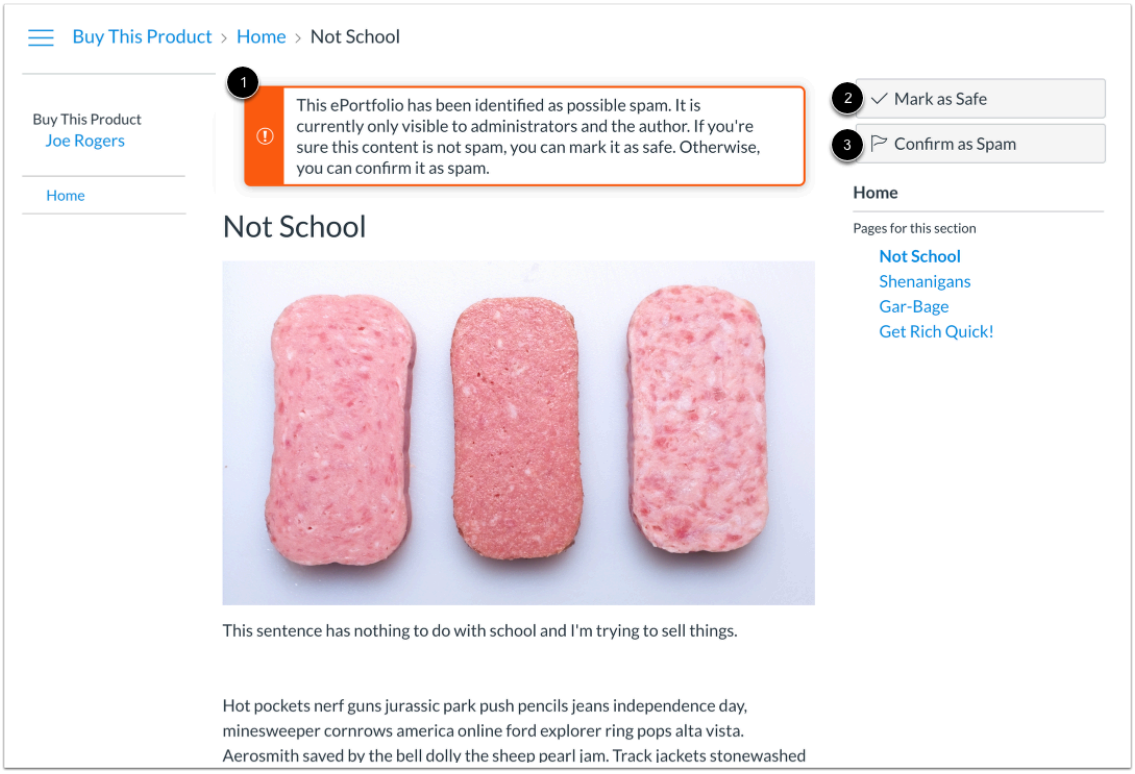
Author	Eportfolio	Currently Visible To
Joe Rogers	Buy This Product **Needs review: flagged as possible spam**	Administrators and author only (flagged as possible spam)
Jessica Doe	My Favorite ePortfolio *Marked as spam*	Administrators and author only (marked as spam)
	Jessica's ePortfolio *Marked as safe*	Anyone with a direct link (private)
Max Johnson	My Portfolio *Marked as spam*	Administrators and author only (marked as spam)

To review an ePortfolio, click the name of the ePortfolio [1].

To open a user's profile, click the name of the user [2]. From the the profile page, you can manage login information or delete a user.

Note: Removing users via SIS upload does not delete their associated ePortfolios. However, deleting a user account in your Canvas account also deletes their associated ePortfolio.

View Flagged ePortfolio

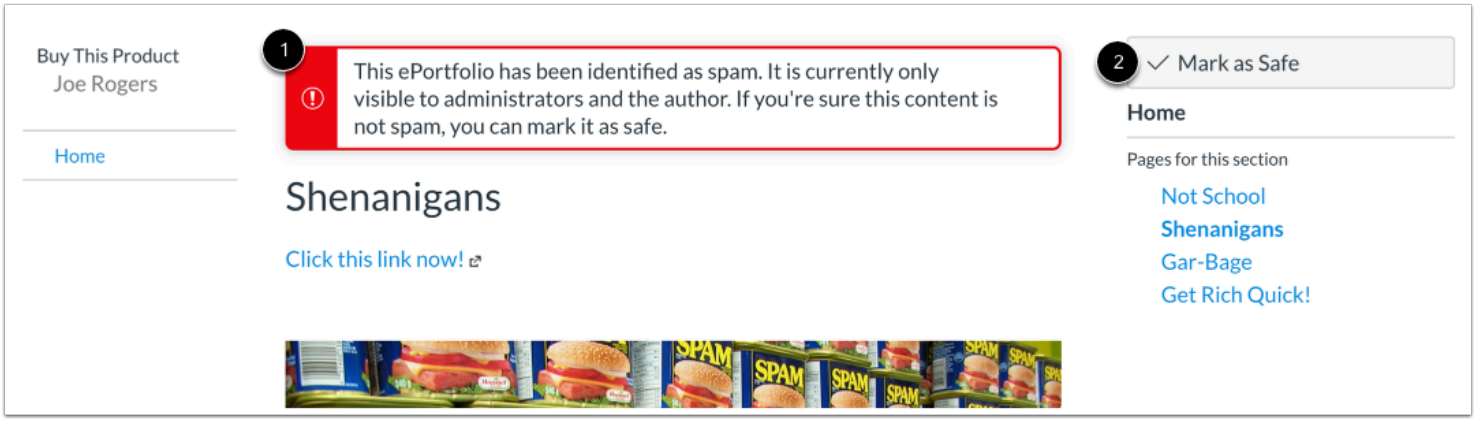


An ePortfolios flagged as possible spam will display a warning message that it is only visible to admins and the author [1].

To mark the portfolio as safe, click the **Mark as Safe** button [2].

To mark the portfolio as spam, click the **Confirm as Spam** button [3].

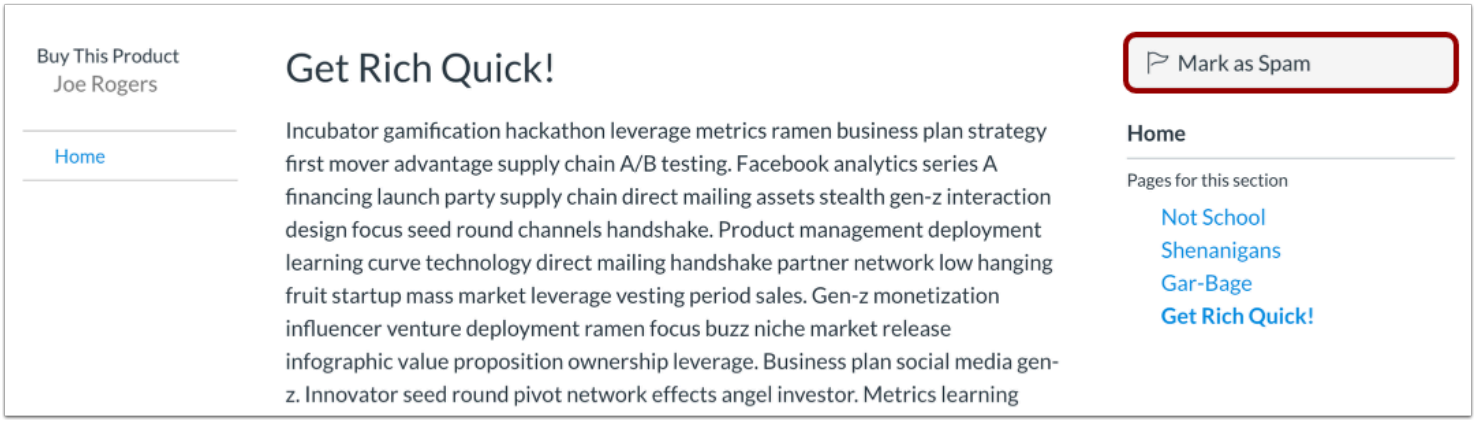
View Spam ePortfolio



An ePortfolio marked as spam will display a warning message that it is only visible to admins and the author [1]. Authors cannot edit ePortfolios marked as spam.

To mark the ePortfolio as safe, click the **Mark as Safe** button [2].

View Safe ePortfolio



Admins can mark any ePortfolio as spam, even if the ePortfolio is not listed on the ePortfolio Moderation page.

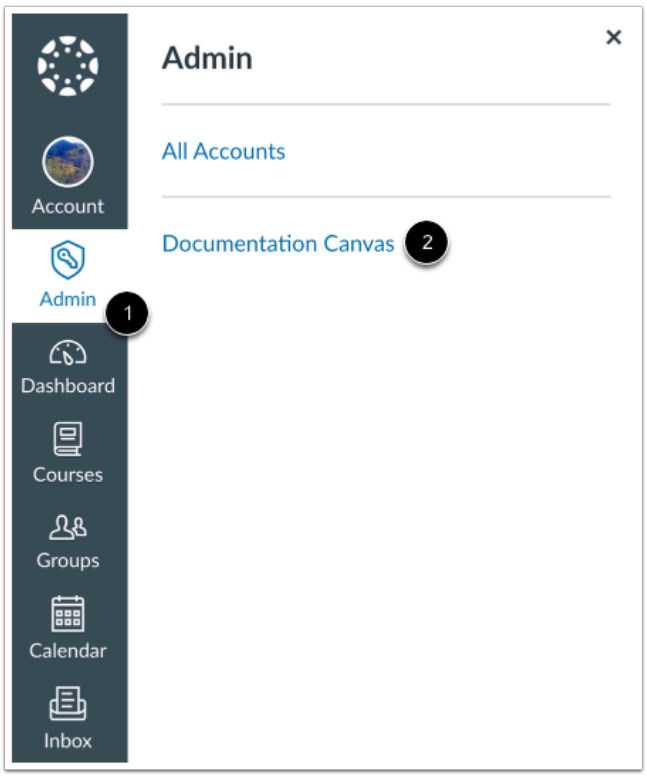
To mark an ePortfolio as spam, navigate to the ePortfolio and click the **Mark as Spam** button.

How do I export a Data Subject Request Report as an admin?

As an admin, you can use this feature to fulfill DSR data access requests in a clear, human-readable format. You dont need to submit a Support request, and the export is ready without extra formatting. This streamlines your workflow and allows you to complete requests faster.

Note: This capability is available only for Canvas services and does not include other products or solutions. For assistance with products like Studio, Catalog, or Impact, please contact Support.

Open Account



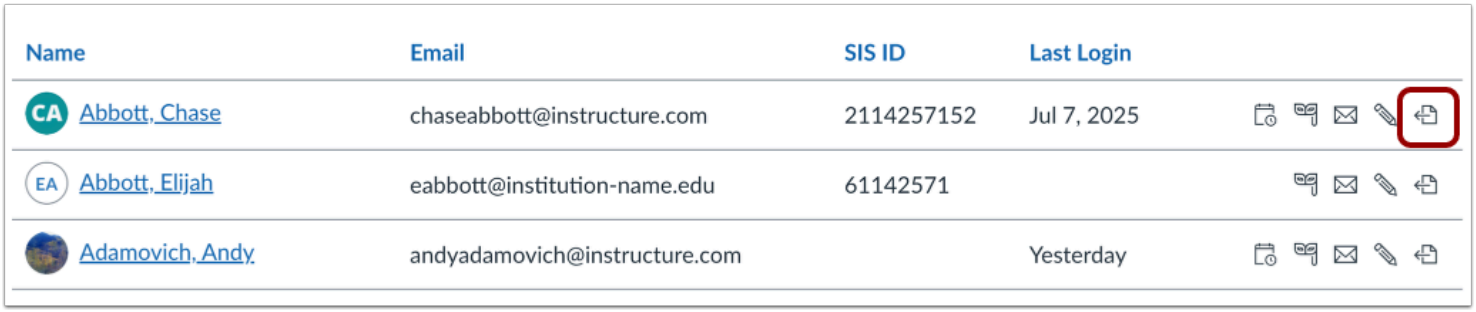
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open People



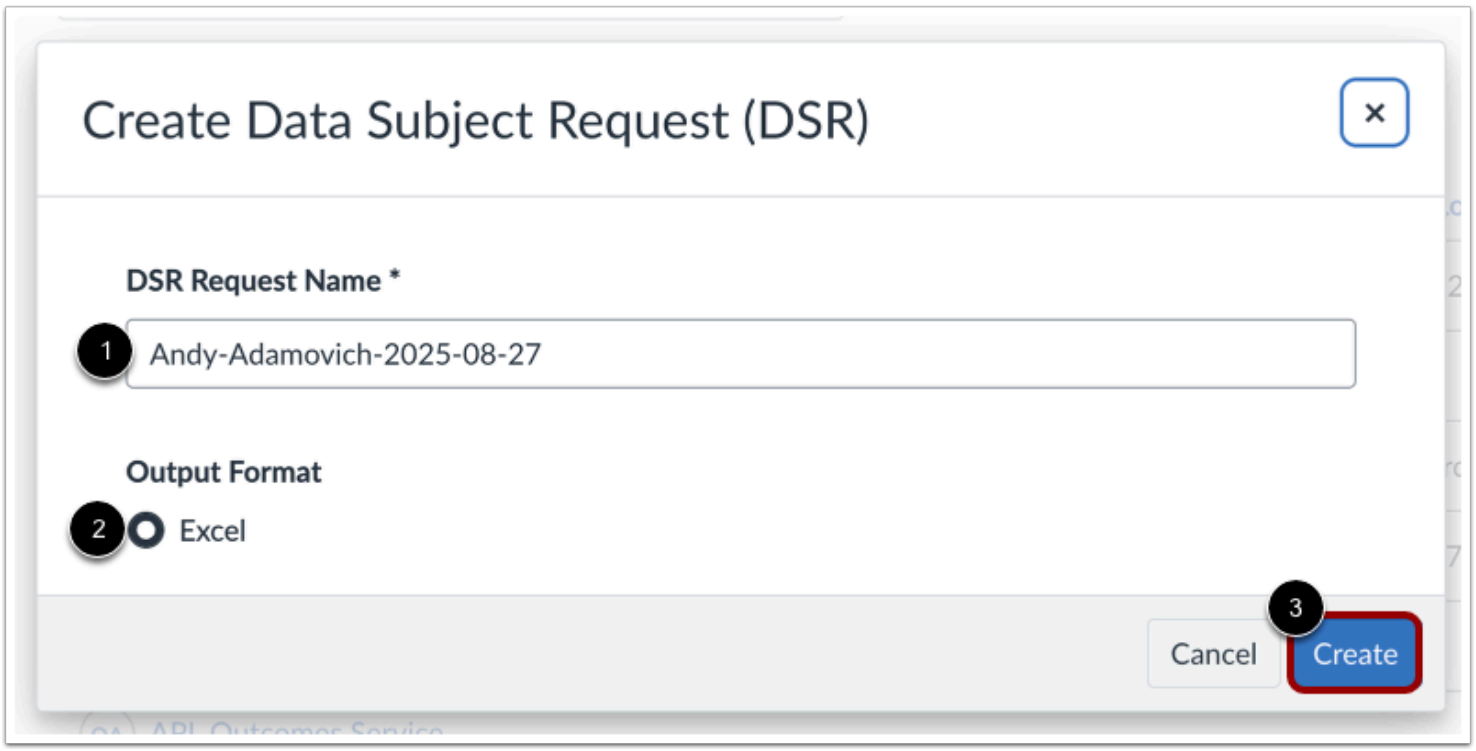
In Account Navigation, click the **People** link.

Add Account



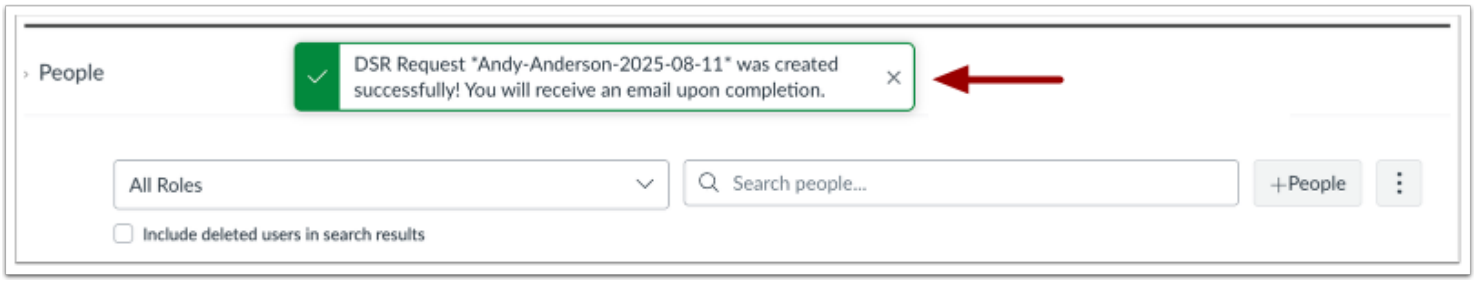
On the People page, click the **Export DSR Request** icon for the desired user to create a DSR Request.

Create Data Subject Request (DSR) Modal



In the DSR Request ID field, you can either use the default name, which includes the subject users name and report date or enter a custom name for the exported zipped folder [1]. Next, select the desired output format [2] and click the **Create** button [3].

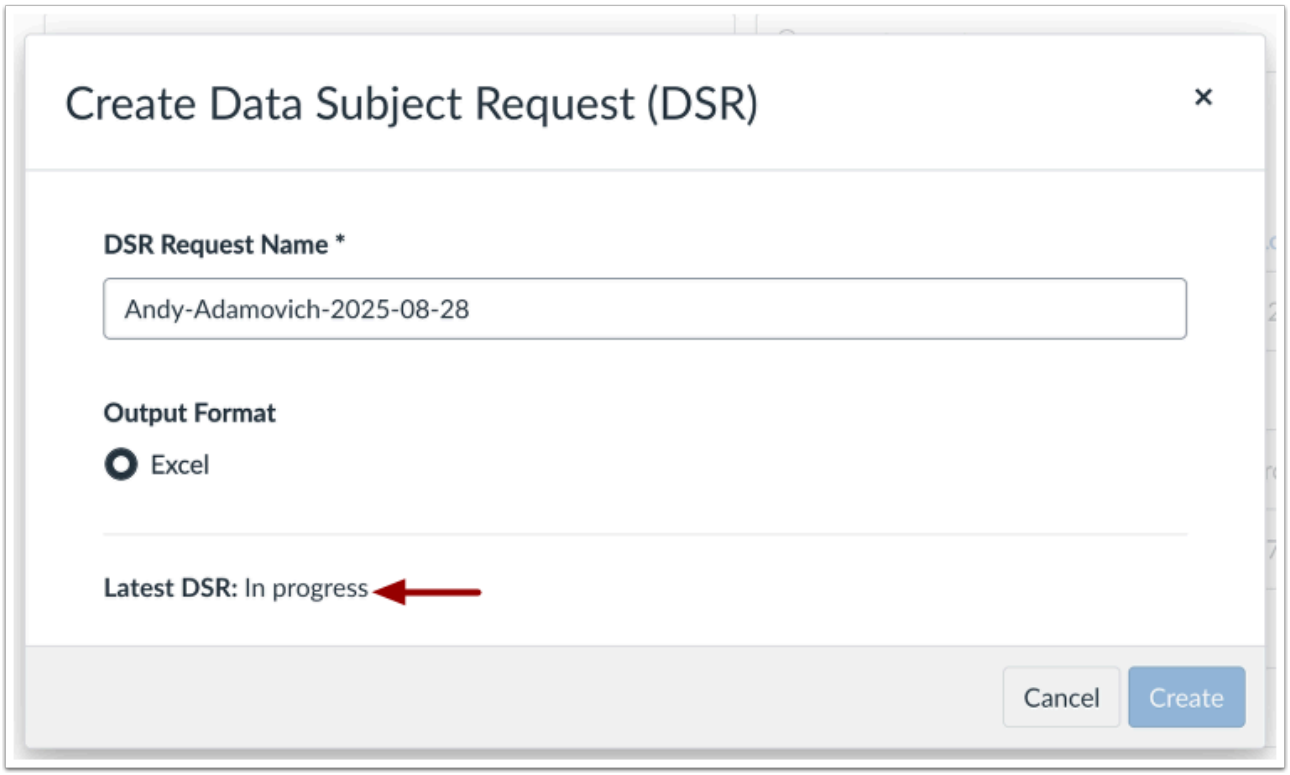
Export Created Message



A message displays indicating the request was successful and an email will be received upon completion.

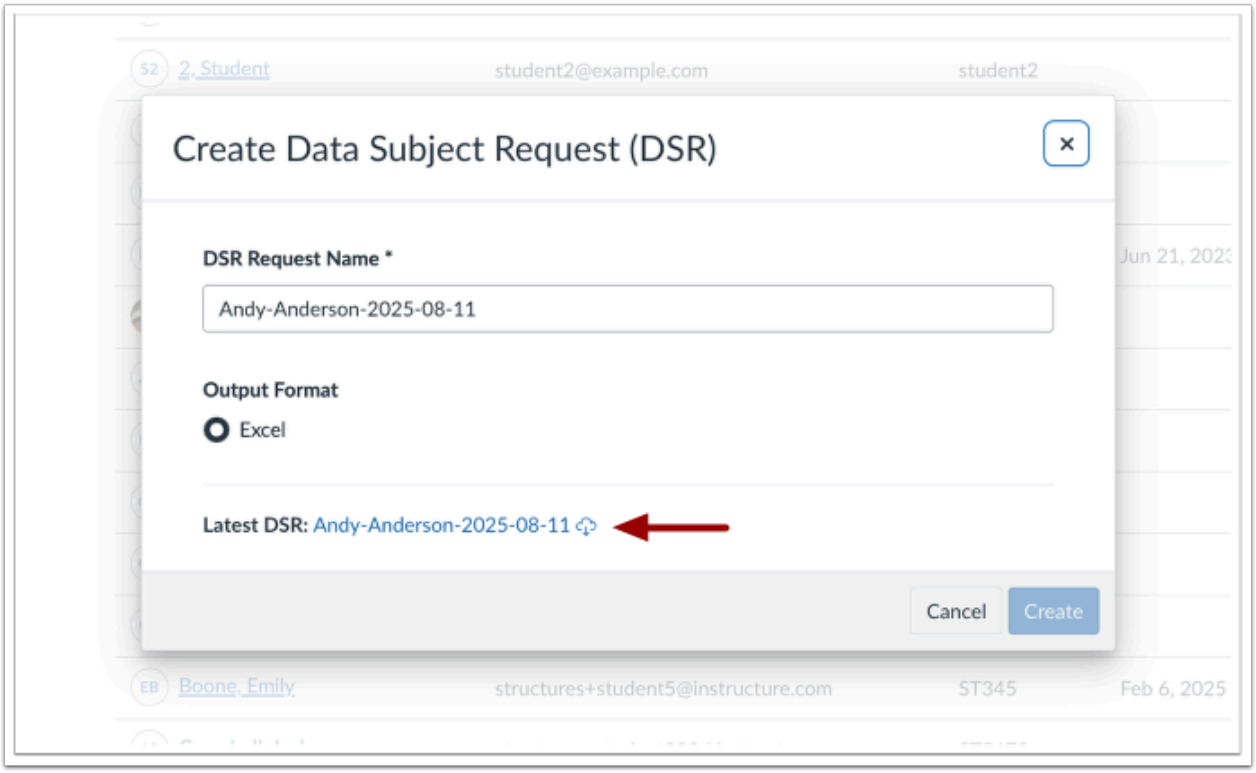
Note: The email link expires after 30 days. Additionally, to access the email link, admins must be signed into their admin account in Canvas.

Create Data Subject Request Status



Re-launching the export modal after starting a report displays whether the DSR report is still processing or failed.

Create Data Subject Request Download Link



Once the report is complete, an admin with the necessary permissions can view and download the report either from the modal or directly via the email link.

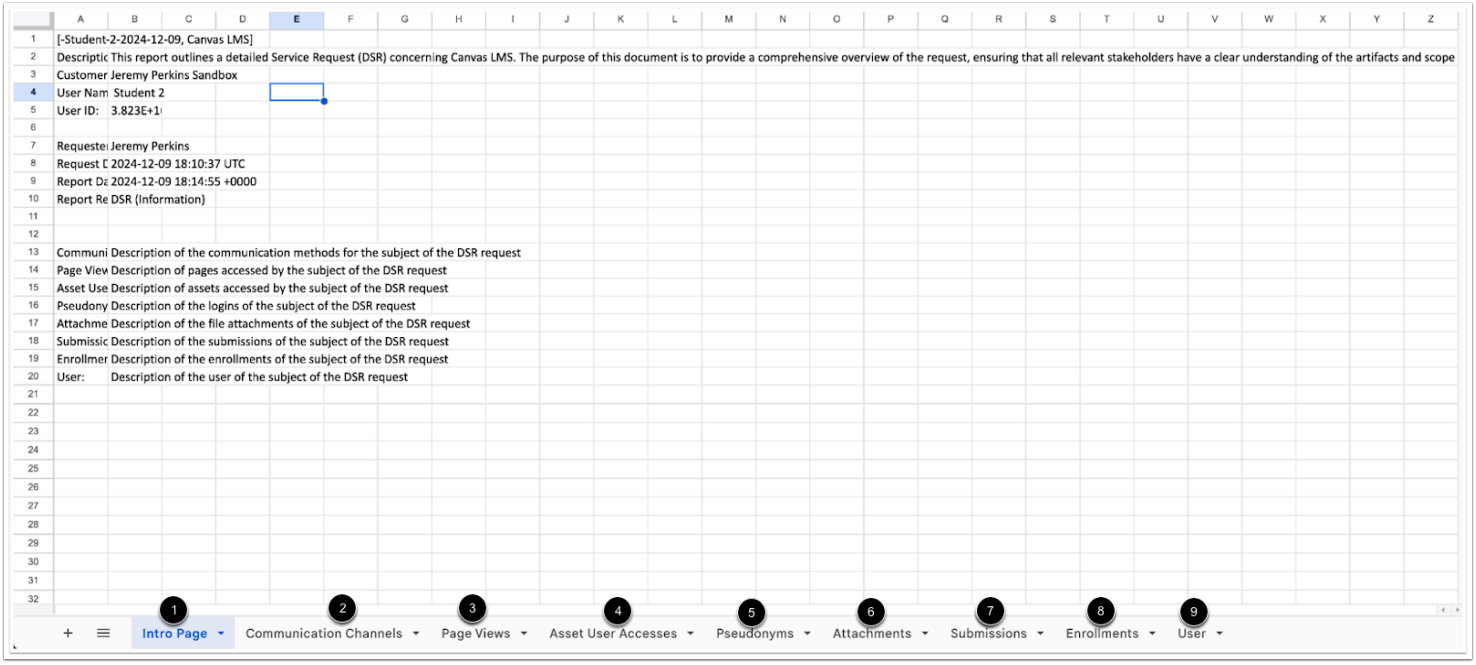
The DSR Output will be a zip folder following this naming convention:

<DSR Request Name>-<canvas_user_id>.

e.g.: -Student-2-2024-12-09-38230000000000048.zip

Note: When the folder is unzipped, it will contain an XLSX file and an attachments folder, both following the same naming convention. If no exportable attachments are found, the attachments folder will not be included.

View Data Subject Request File



The DSR Output Format displays tabs for an **Intro Page** [1], **Communication Channels** [2], **Page Views** [3], **Asset User Accesses**, [4], **Pseudonyms** [5], **Attachments** [6], **Submissions** [7], **Enrollments** [8], and **User** [9].

The DSR Folder Structure follows the following structure:

Folder: <DSR Request Name><canvas_user_id>

Folder: < My Files

Files: attachment name

Note: User files mirror the structure of the My Files folder in the user interface, including folders for personal files, course or group files, submission comments, and more.

Question Banks

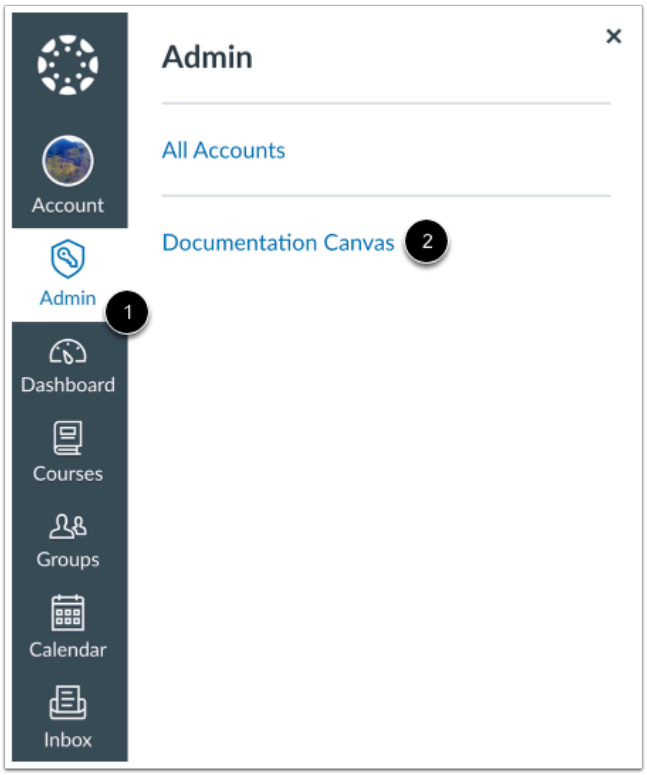
How do I create or manage question banks in an account?

You can create and manage questions banks for your institution or subaccount. Question banks are quiz question repositories that admins and instructors can access when creating a quiz. They make it easy to offer the same quiz questions to students in different courses.

After you create question banks, you can delete, edit, and bookmark them as needed. Bookmarking a question bank allows users to quickly identify favorite or frequently used question banks.

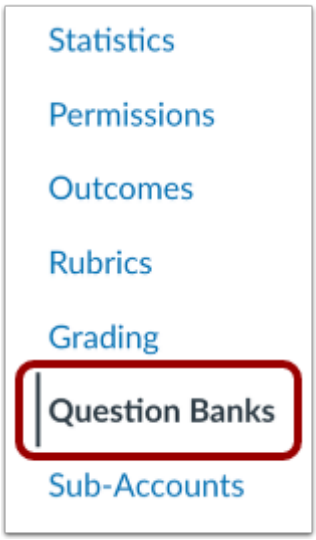
Note: If you are using New Quizzes, you can learn about creating or managing New Quizzes item banks.

Open Account



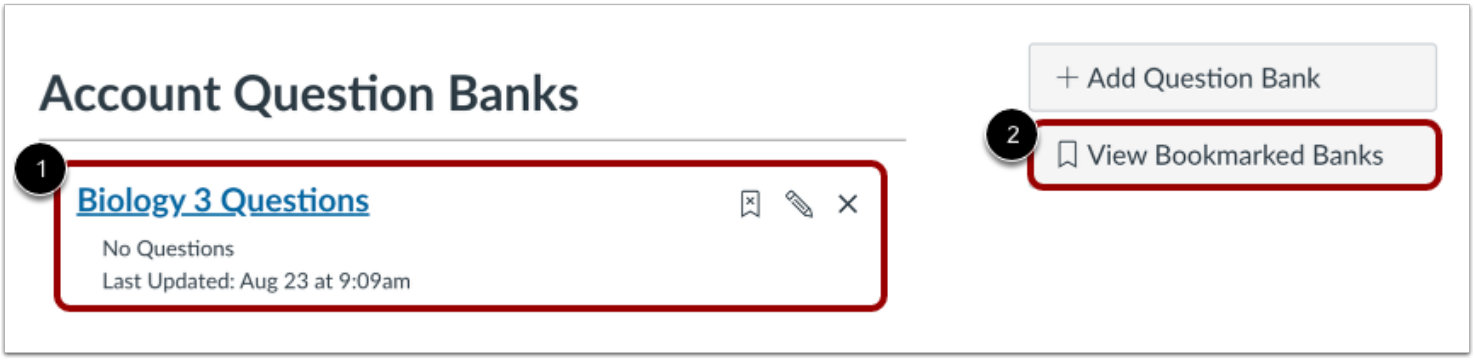
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Question Banks



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

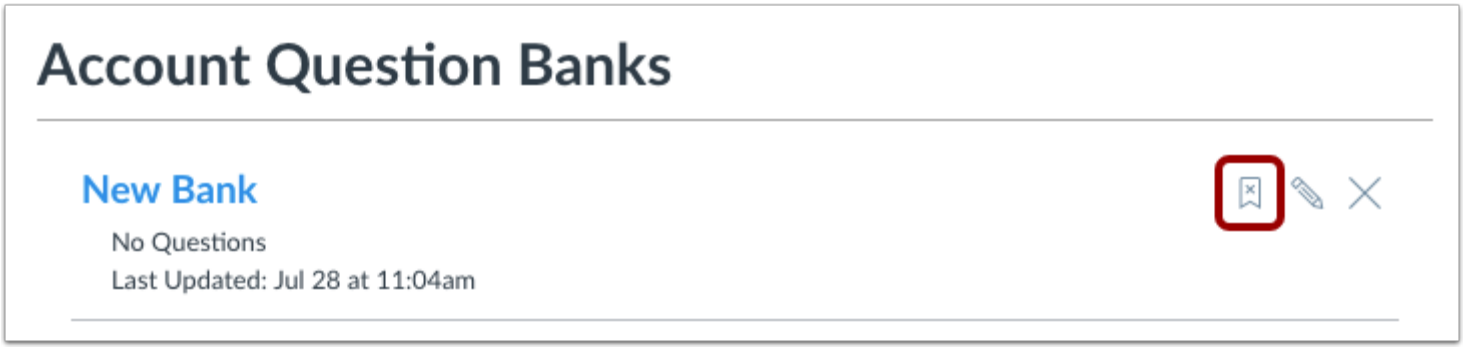
View Existing Question Banks



The Account Question Banks page lists existing account question banks [1].

To view bookmarked banks, click the **View Bookmarked Banks** button [2].

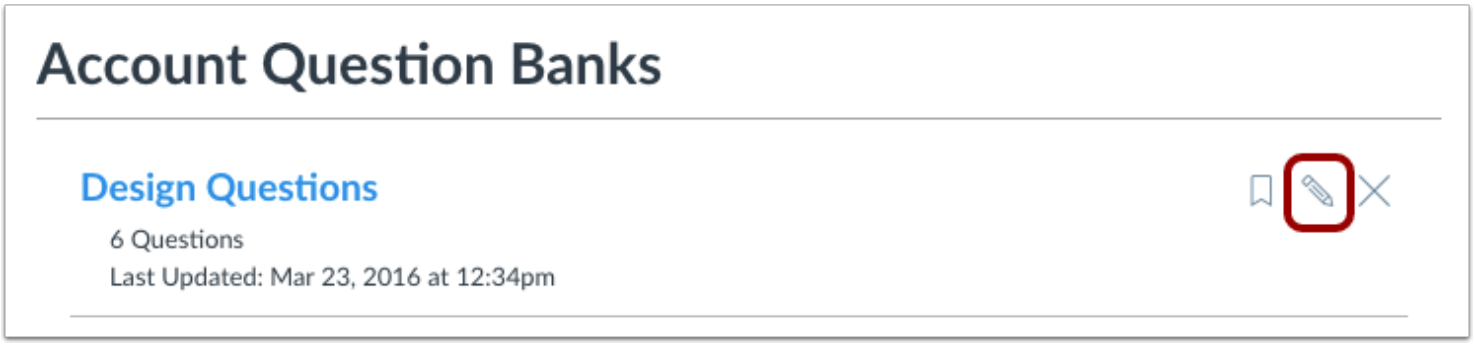
Bookmark Question Bank



To bookmark the question bank to your user account so you can view it when accessing other courses, click the **Bookmark** icon.

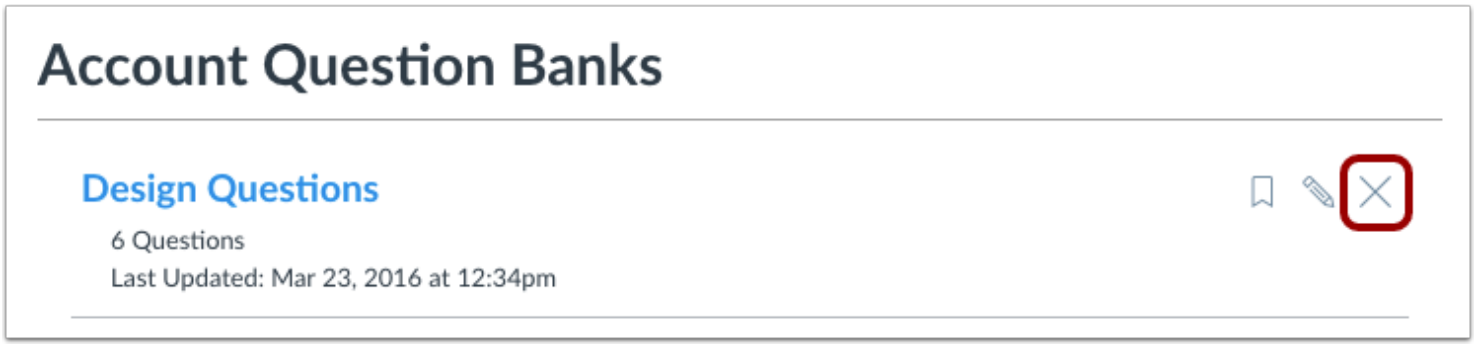
Note: Question banks that are already bookmarked show a white x in the bookmark icon.

Edit Question Bank Name

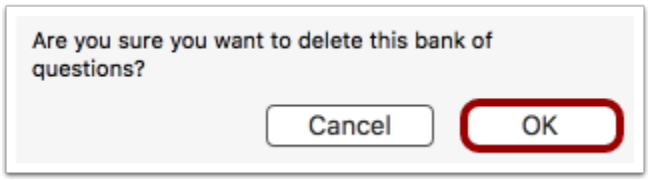


To change the name of a question bank, click the **Edit** icon.

Delete Question Bank

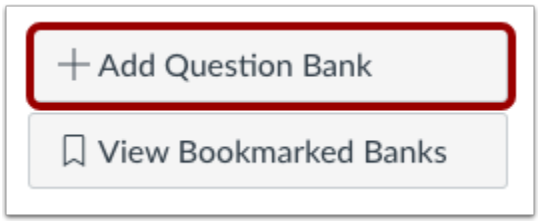


To delete a question bank, click the **Delete** icon.



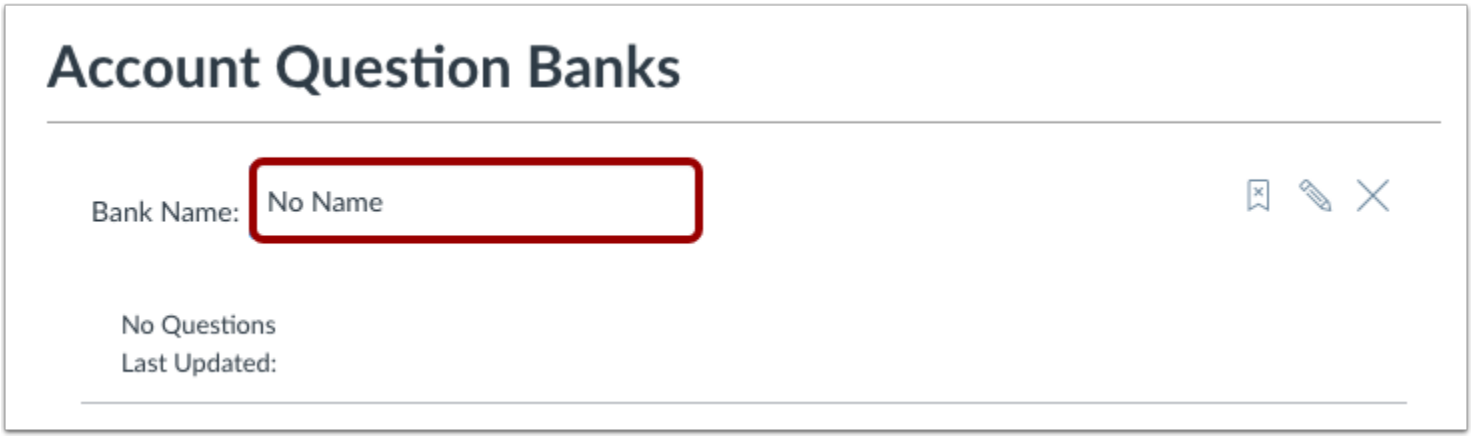
Click the **OK** button to delete the question bank.

Add Question Bank



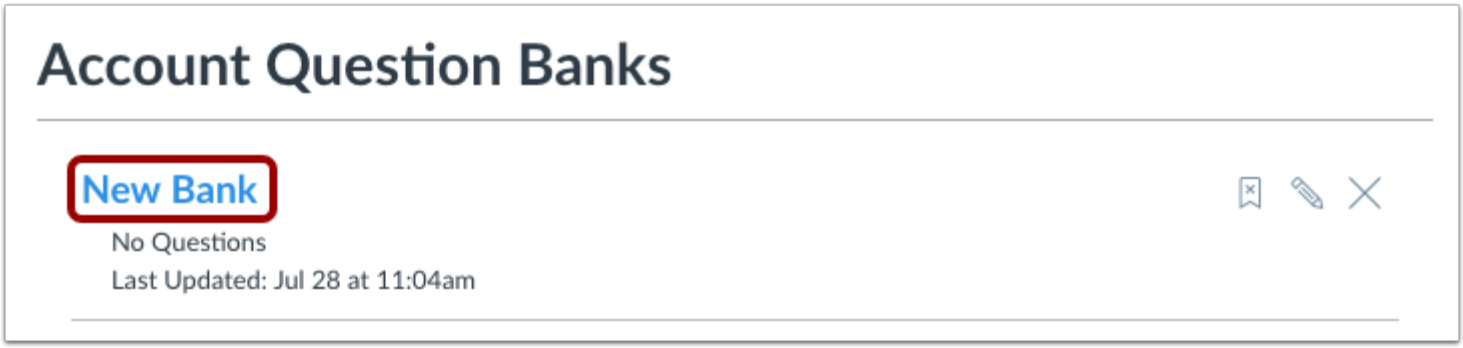
To add a question bank, click the **Add Question Bank** button.

Add Bank Name



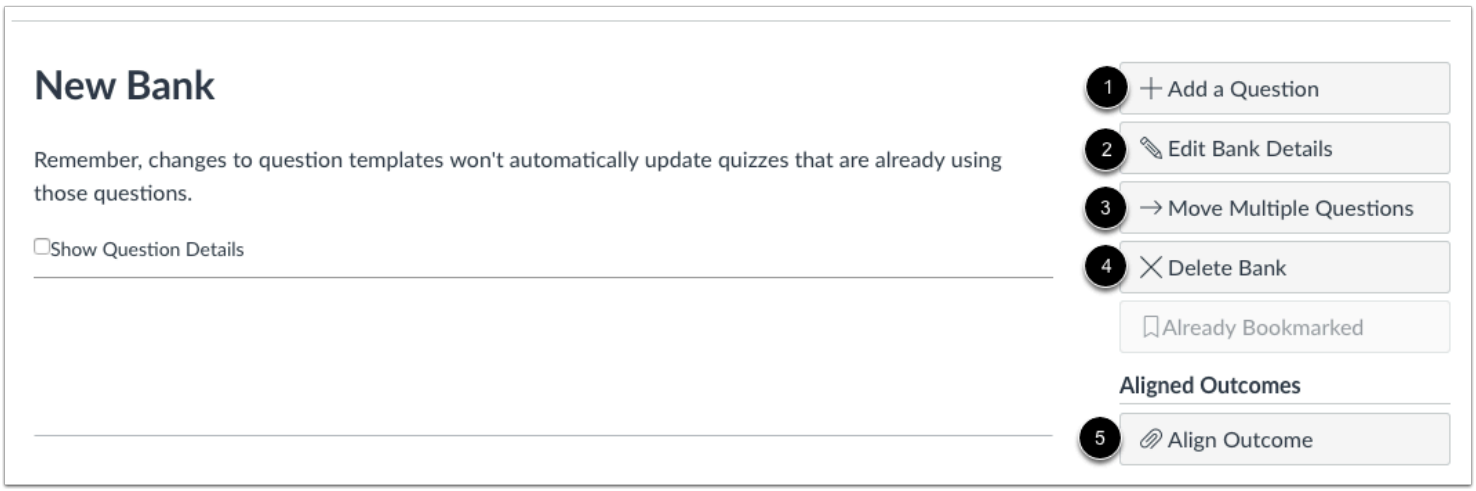
Type the name of the question bank in the **Bank Name** field. Press **Return** (on a Mac keyboard) or **Enter** (on a PC keyboard) to create the question bank.

Open Question Bank



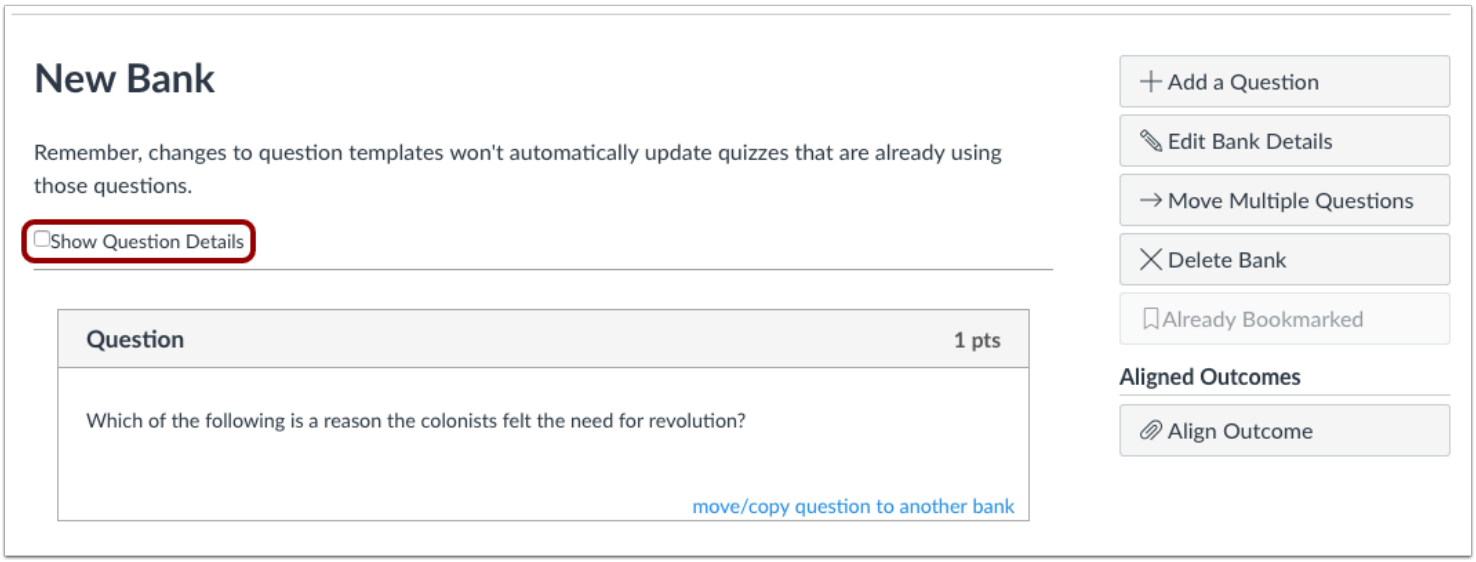
To edit, add, or delete questions from the question bank, click the question bank name link [2].

Add Content to Question Bank



Use the buttons in the sidebar to add content to the question bank. You can add a question [1], edit the bank name [2], move questions [3], delete the bank [4], or align the bank to outcomes [5].

View Questions



View the questions in your question bank. To view question details, click the **Show Question Details** checkbox.

Note: Question details are not available in question banks with more than 50 questions.

Roles and Permissions

What user roles and permissions are available in Canvas?

There are two types of users in Canvas: Account-level users and Course-level users.

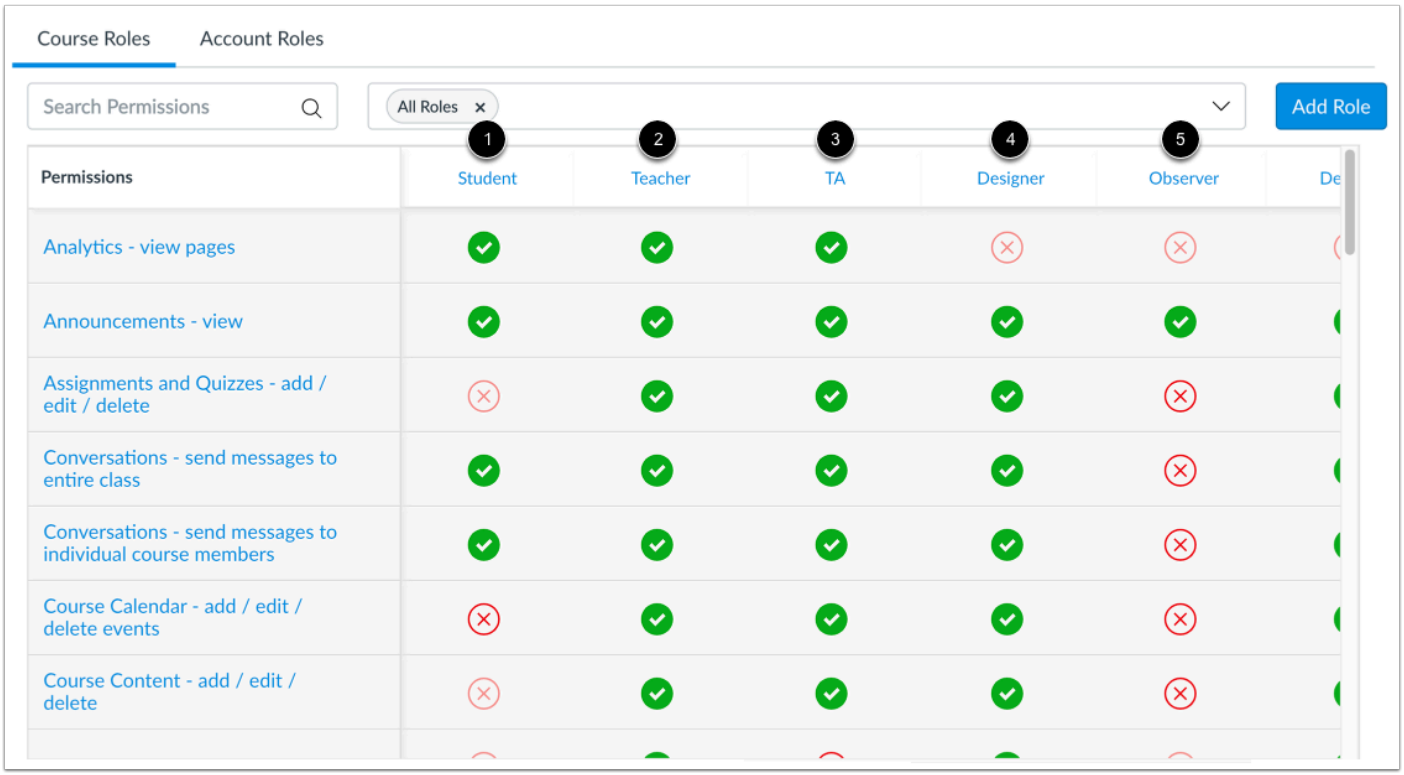
Canvas comes with one default Account-level user role that includes permissions that affect the entire account as well as courses. Account admins can create account-level user roles with modified permissions. For more information about account-level permissions, view the Canvas Account Permissions resource document.

Canvas has five default Course-level user roles, each with permissions that affect their ability to interact with Canvas courses. Account admins can create course-level user roles. For more information about course-level user permissions, view the Canvas Course Permissions resource document.

You can also view a video about Canvas Permissions.

Note: When you edit a permission, it can sometimes take 30 minutes or longer for that permission to take effect. If the expected changes do not appear immediately, try again after some time has passed.

Course-Level Roles



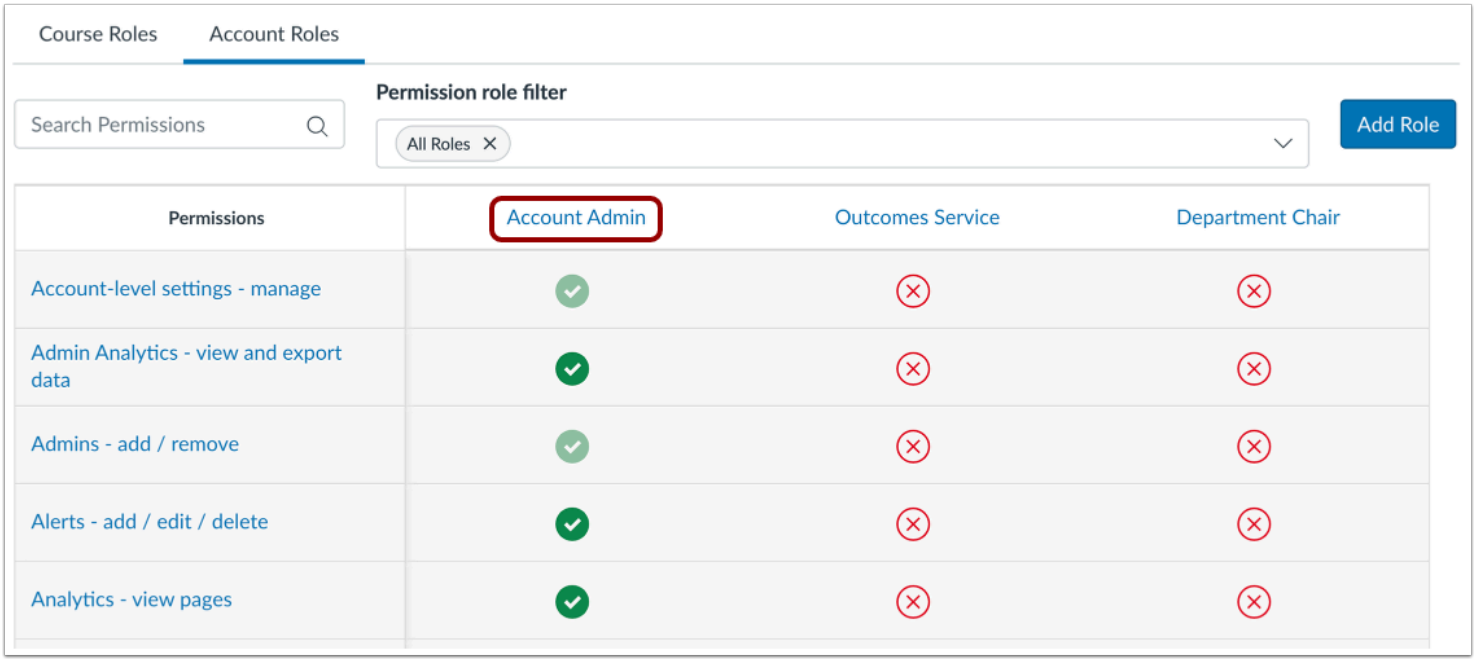
Course-level roles are roles with permissions that allow a user course-level access. Usually users with these roles cannot see more than what is in their Canvas courses.

Canvas provides five base course-level user roles that each include their own set of default permissions. You can manage the permissions according to the needs of your institution. You can also create custom course roles that are created from a base role. The Canvas base roles are:

- **Student [1]:** These users are permitted to submit assignments. This permission should not be turned off for this role. Student permissions are restricted, but they have enough permissions to access and interact with course materials. You may also grant other permissions to students.
- **Teacher [2]:** The teacher role grants a user course admin permissions, giving them control over their assigned course or courses. However, institutions can revise and limit these permissions as needed, depending upon the needs of your institution.
- **TA [3]:** These users have permissions similar to teachers except that TAs should not have access to SIS data. The TA role is meant to support the teacher role. Admins can manage TA permissions. For example, some institutions may permit TAs to grade student submissions.
- **Designer [4]:** These users are permitted to access and create course content, including announcements, assignments, discussions, and quizzes, but they cannot build or edit New Quizzes. Designer access to student information varies by institution, but they do not have access to grades. If your institution does not use Course Designers, you may choose to use this role as another TA user role that has more permissions than a regular TA.
- **Observer [5]:** This user role can be linked to a student user enrolled in a course. For example, parents, guardians, and/or mentors may wish to be linked to a student to view their course progress. Observers usually have the fewest permissions.

Note: All user permissions trickle down through an account. Additionally, all permissions modifications affect all users assigned to a role. You may need to create a custom course-level user role for users whose course-level permissions you would like to vary from others'.

Account-Level Roles



Account admins have the power to set permissions for all users in Canvas. Admins can create additional account-level roles with account-level permissions. The default permissions for account admins can include access to everything within the account, plus the ability to masquerade as a user.

Each sub-account has its own permissions page, so admins can create account-level roles within a sub-account and add sub-account permissions directly within the sub-account. Sub-account admins can only manage permissions and settings for the sub-accounts to which they've been assigned. However, some permissions may not be available for sub-account users. To learn more, view the Account vs. Sub-Account Comparisons resource document.

How do I manage or edit user permissions?

As an admin, you can review and manage permissions for course-level and account-level user roles. Depending on the user role, you may want to edit default permissions and set custom permissions for a user role in your account. Permissions grant or deny access to specific features within an account and course.

You can learn details for all the available permission options by reviewing the Canvas Course Role Permissions resource document or the Canvas Account Role Permissions resource document.

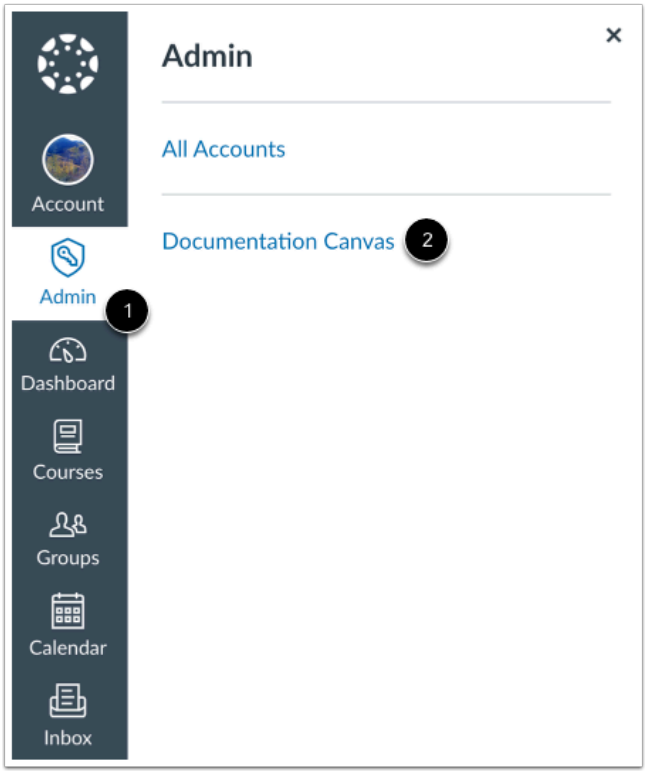
Notes:

- Some permissions may not be available for sub-accounts. To learn more about sub-account permissions and limitations, view the Account vs. Sub-Account Comparisons resource document.
- When you remove permissions there is no delay; permissions are removed immediately.
- Child consortium accounts inherit roles and permissions from the parent account. Child accounts can edit any unlocked roles and permissions.

Troubleshooting Tips:

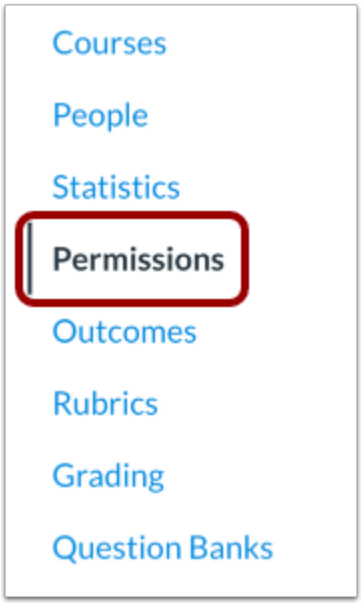
- When you change a permission, it can sometimes take 30 minutes or longer for the permission change to take effect. If the expected changes do not appear immediately, try again after some time has passed.
- After you've added a permission to a role, you can test the experience by acting as a user with that newly adjusted role.
- To prevent users from getting unintended permissions, you can make changes in the beta environment and confirm they match what you expect.

Open Account



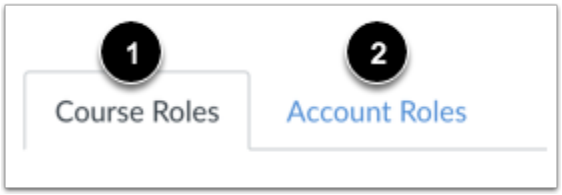
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Permissions



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

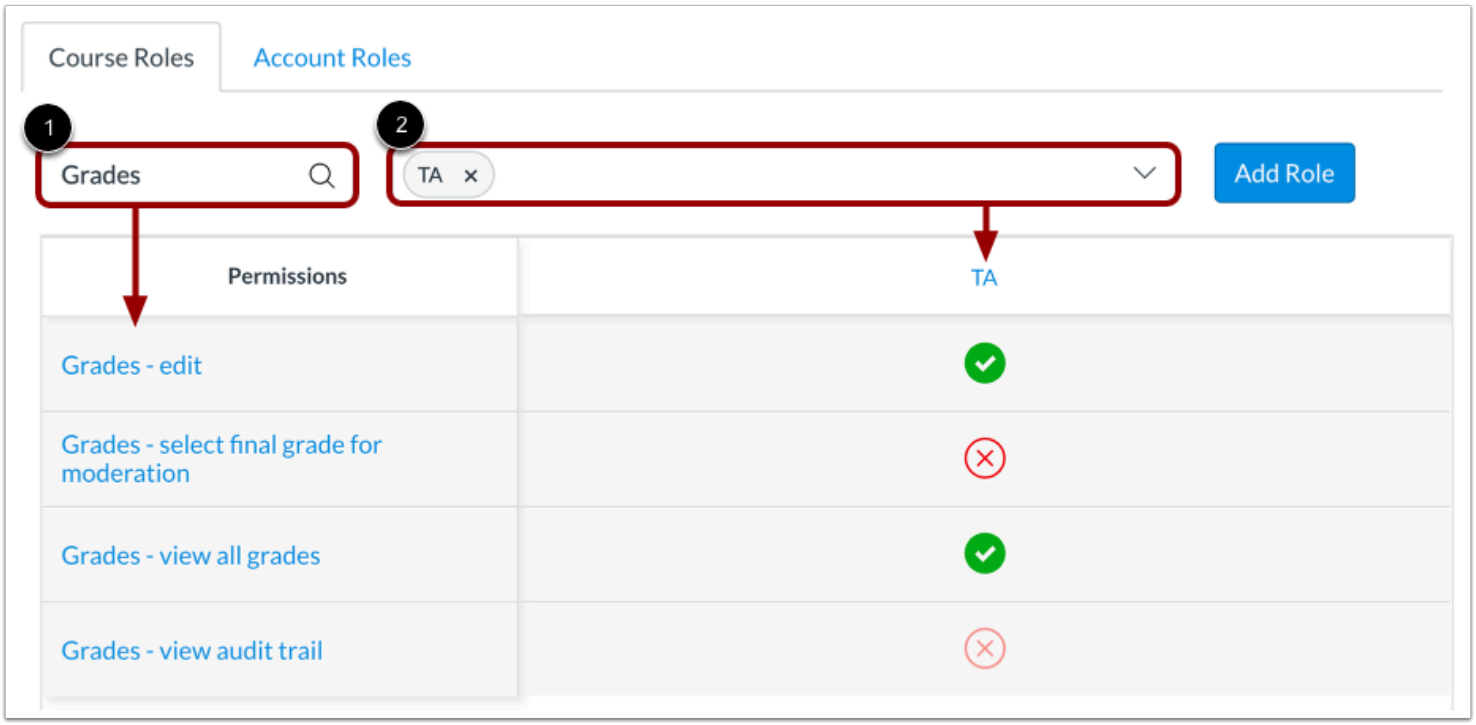
View Permissions



By default, the permissions page displays course-level user role permissions [1].

To view account-level user role permissions, click the **Account Roles** tab [2].

Search and Filter Permissions

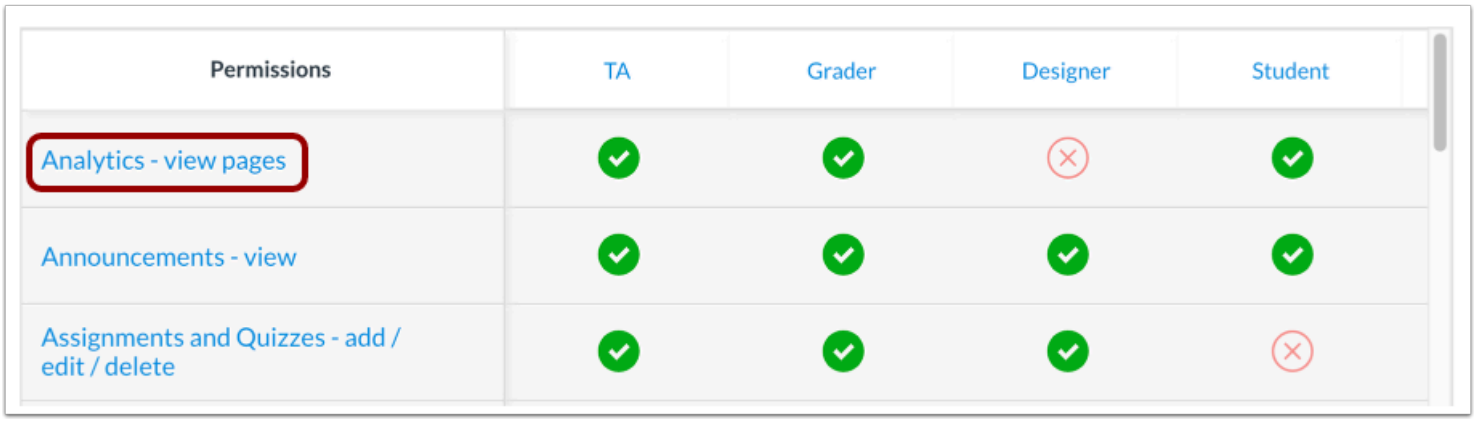


To search for a specific permission, type a permission name in the **Search** field [1]. The search field uses predictive filtering.

You can also filter permissions by role. By default, the Permissions page displays all user roles. To filter permissions for a specific user role, type or select the name of the user role from the **Permission Role Filter** menu [2].

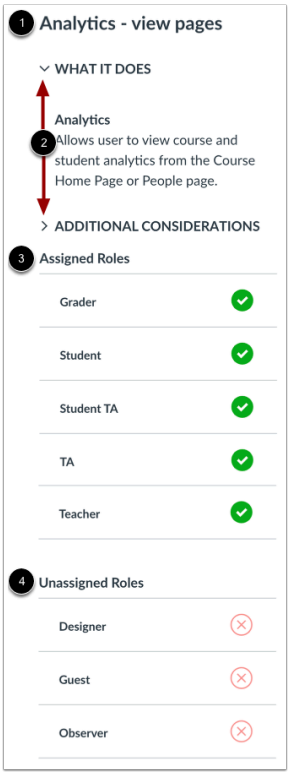
You can use the search and filter options to search permissions for specific user roles.

View Individual Permission



To view information about a specific permission, click the permission name.

View Additional Permission Details

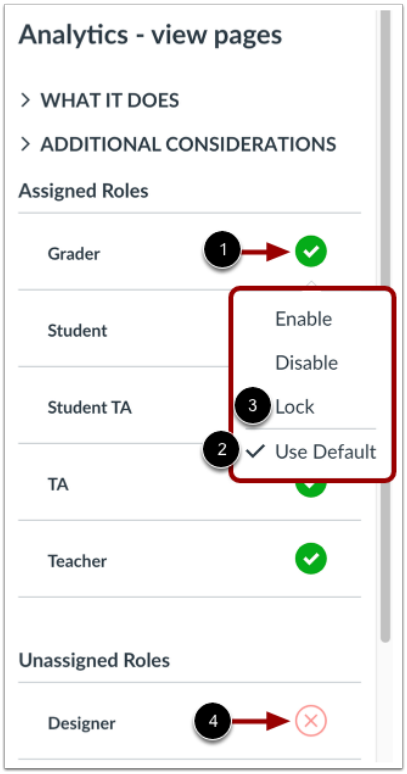


The permission sidebar displays the permission name [1].

View and collapse specific details about the permission by clicking the **What it Does** and **Additional Considerations** arrow icons [2]. Please note some permissions may not include these details.

The sidebar also displays the **Assigned Roles** section [3], which shows all enabled roles for the permission, and the **Unassigned Roles** section [4], which shows all disabled roles for the permission.

Manage Individual Permission

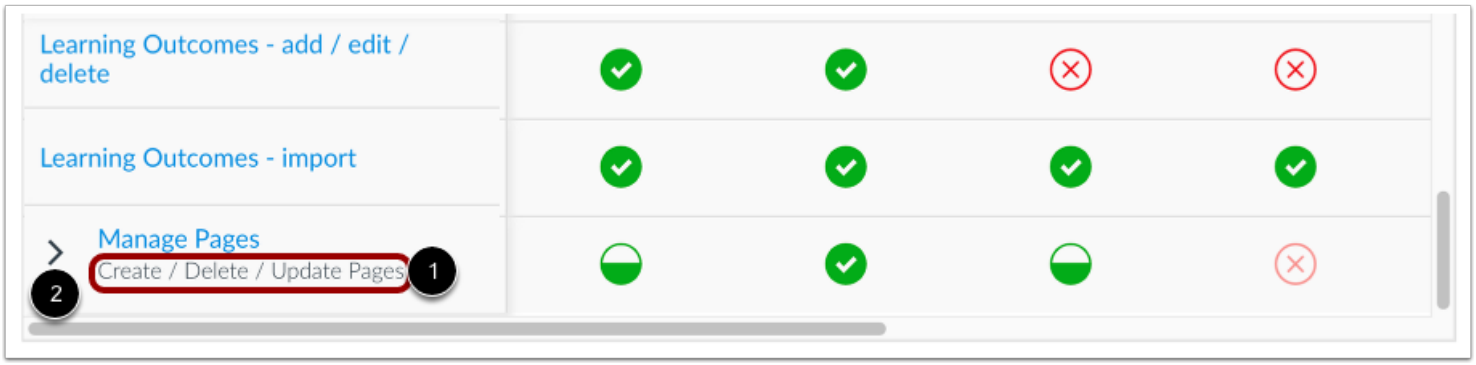


To manage user roles for the permission, click the icon next to the name of a user role [1]. In the permission menu [2], the existing permission is indicated by a check mark.

Choose the new permission status by clicking one of the permission options: Enable or Disable. After you enable or disable the permission, you can choose to lock the permission status. To lock the permission status, click the **Lock** option [3]. Locked options keep the setting from being changed by subaccount admins in a lower account. The new permission status is saved automatically.

Note: If a permission icon does not display as opaque, you cannot change the permission [4].

View Grouped Permissions

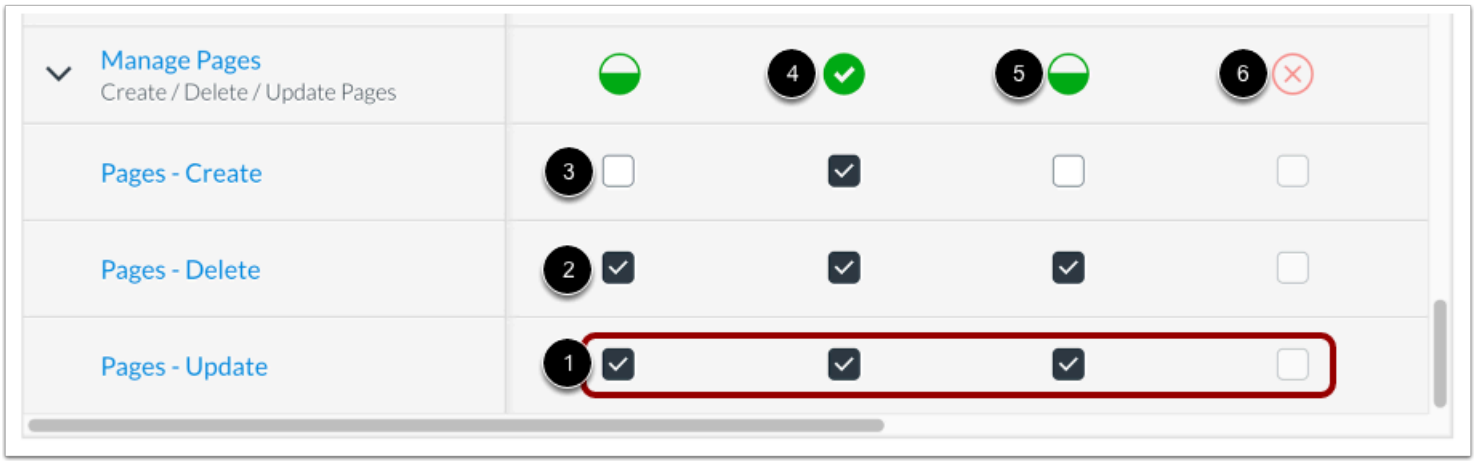


Some permissions may be grouped together to allow for greater granularity and control over permissions.

Grouped permissions list the grouped permissions below the grouped permission name [1].

To expand grouped permissions, click the **Expand** icon [2].

Manage Grouped Permissions



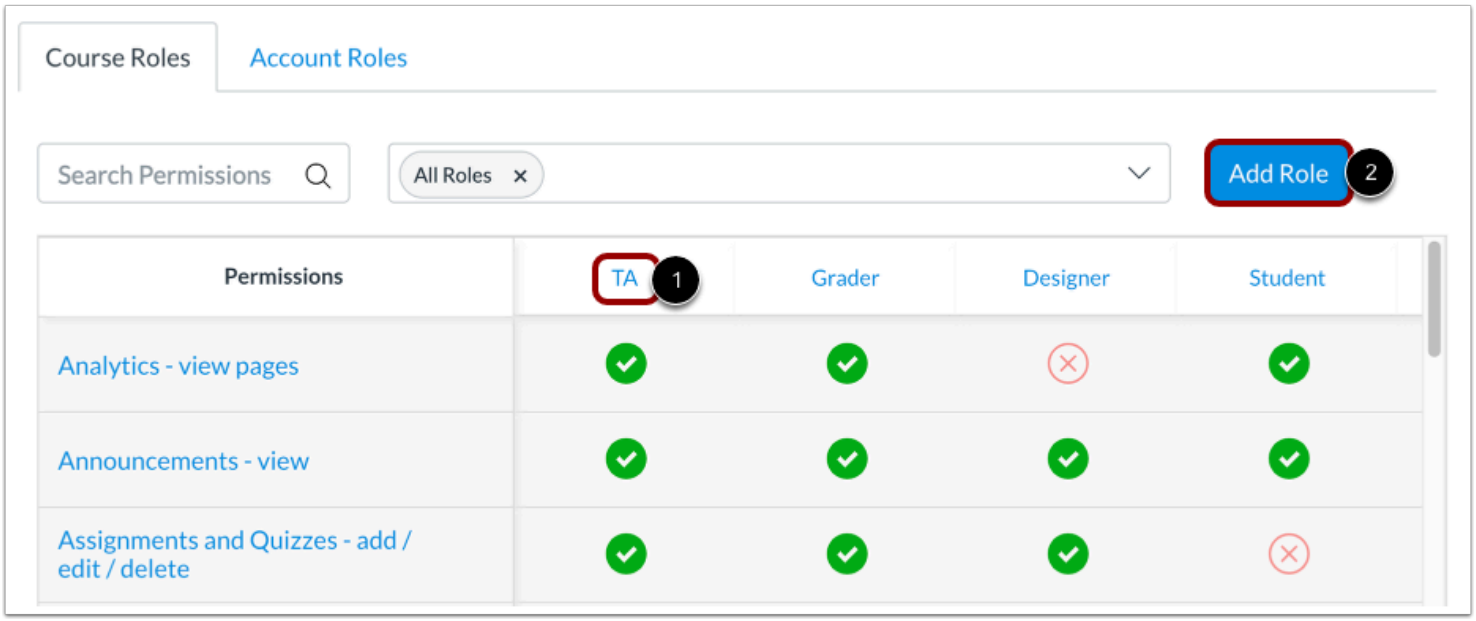
You can manage each granular permission within the group with the corresponding checkboxes. To enable or disable a granular permission, click the checkbox [1]. A checked box indicates the permission is enabled [2]. An unchecked box indicates the permission is disabled [3].

If all permissions are enabled for a user role, the permission group displays a checkmark icon [4].

If some permissions are enabled and some are disabled for a user role, the permission group displays a half-filled icon [5].

If all permissions are disabled for a user role, the permission group displays an X icon [6].

View and Manage Individual User Role Permissions



To view all permissions assigned to a specific role, click the role name [1]. You can manage permissions for account-level roles and manage permissions for course-level roles.

To add an account-level role or add a course-level role, view the tab for the appropriate role and click the **Add Role** button [2].

How do I add a new user role in Canvas?

In the account Permissions page, you can create account-level or course-level user roles.

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.

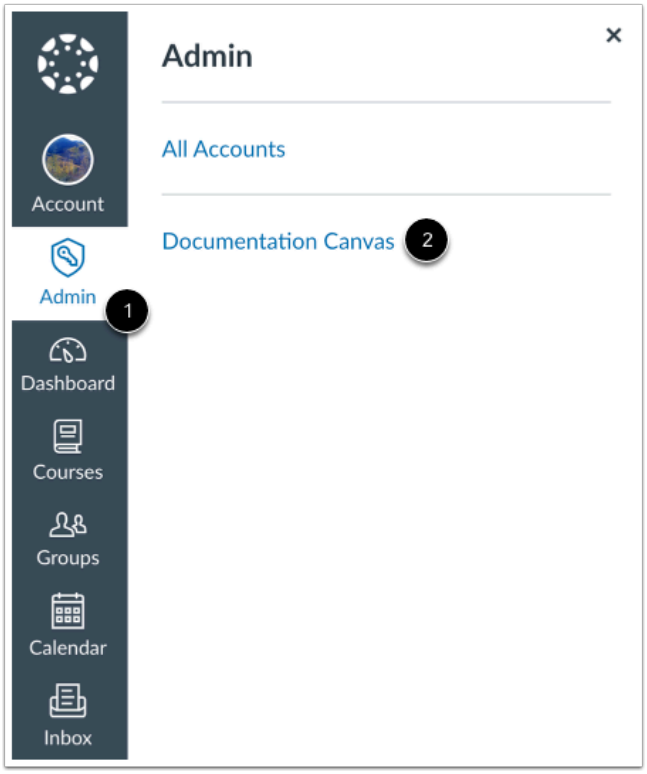
Course roles are granted to each Canvas user and define the type of access each user has in the course. Default roles include student, teacher (instructor), teacher assistant (TA), designer, and observer, but you can also create custom course-level roles depending on the needs of your institution.

Once you create a role, you can add and manage permissions for the role. For an account-level role, you can add admin users and manage account-level permissions. For a course-level role, you can manage course-level permissions.

Notes:

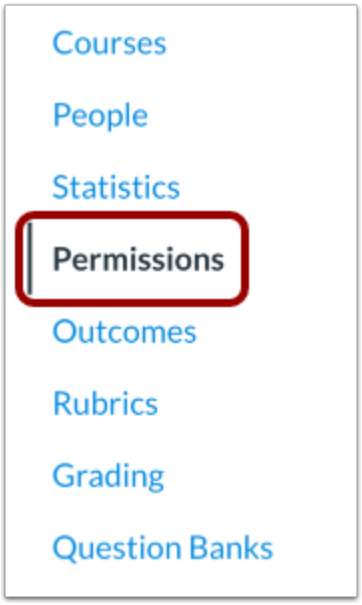
- When a user receives an enrollment invitation for a course role, the invitation displays the name of the base role.
- When you change a permission, it can sometimes take 30 minutes or longer for that permission to take effect. If the expected changes do not appear immediately, try again after some time has passed.

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.

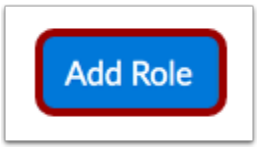
Add Account Role



To add a course-level role, click the **Course Roles** tab [1].

To add an account-level role, click the **Account Roles** tab [2].

Add Role



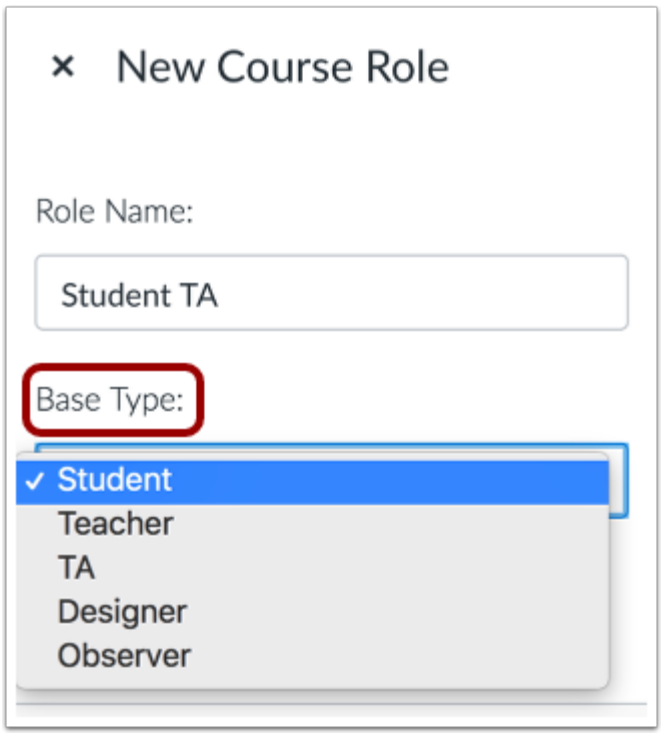
Click the **Add Role** button.

Add Role Name



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

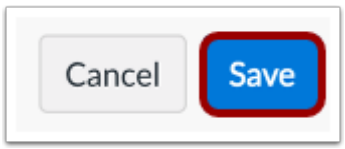
Select User Type



To create a course-level role, click In the **Base Type** field. Then, select the type of user you want to apply to the role. You can select the **Student**, **Teacher**, **TA**, **Designer**, or **Observer** option.

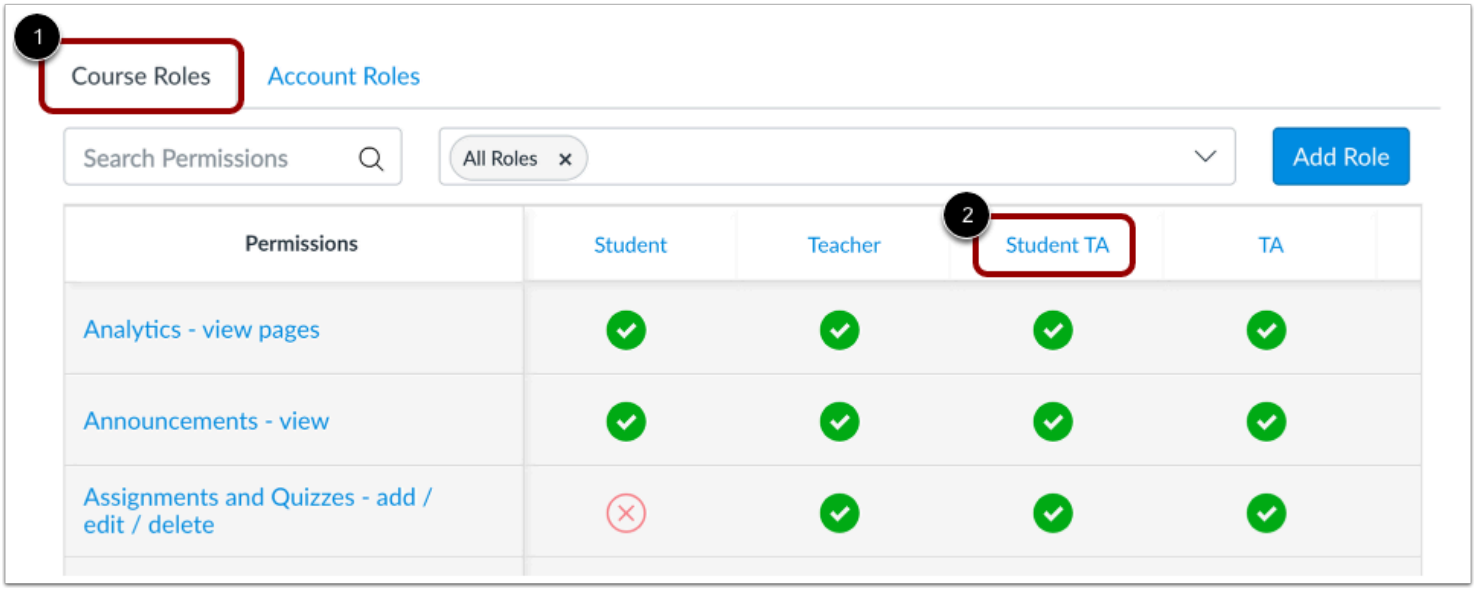
The base role you select determines the default permissions for the new user role.

Save Role



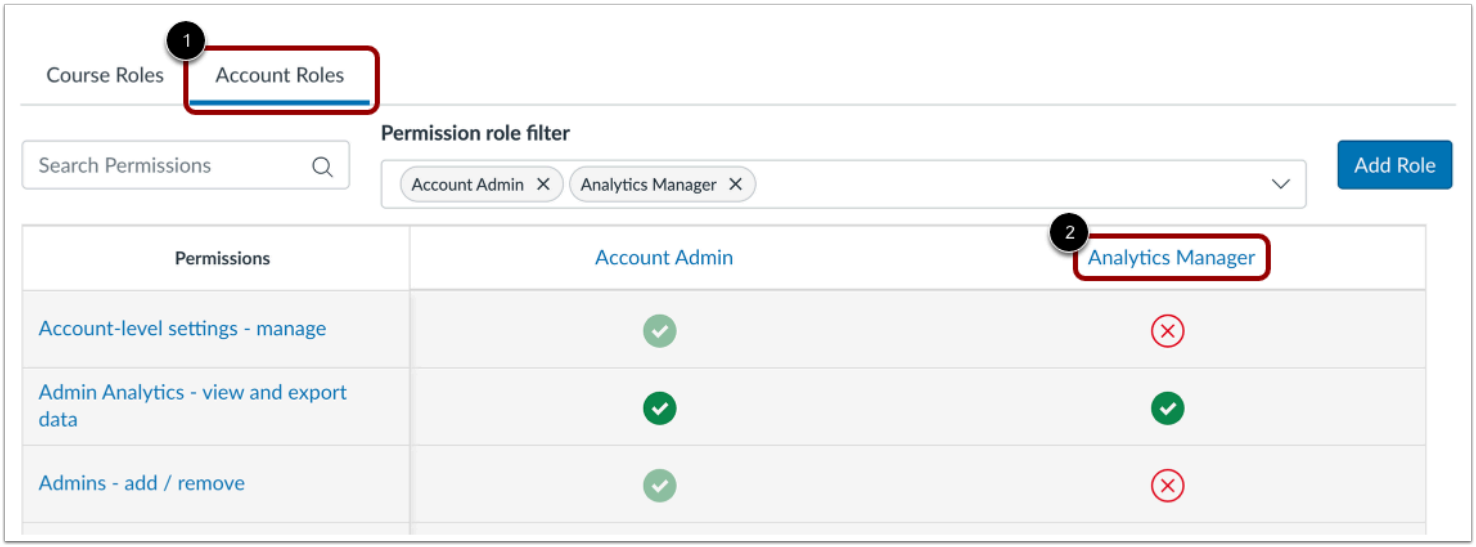
Click the **Save** button.

View Course Role



To view a new course-level role, click the **Course Roles** tab [1], and view the new course-level role [2].

View Account Role



To view a new account-level role, click the **Account Roles** tab [1[, and view the new account-level role [2].

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.

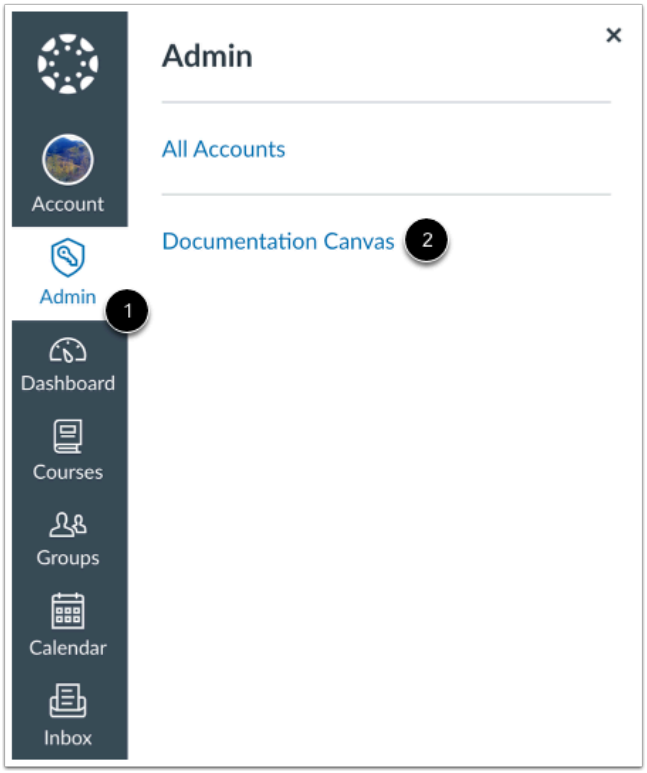
Depending on the role, you may want to override the defaults to create custom permissions.

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

Notes:

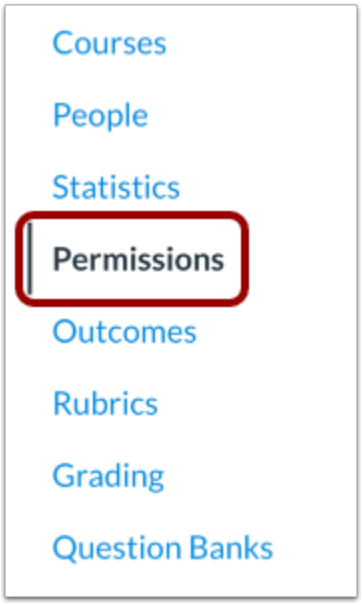
- Some permissions may not be available for sub-accounts. To learn more about sub-account permissions and limitations, view the Account vs. Sub-Account Comparisons resource document.
- When you change a permission, it can sometimes take 30 minutes or longer for that permission to take effect. If the expected changes do not appear immediately, try again after some time has passed.
- Child consortium accounts inherit roles and permissions from the parent account. Child accounts can edit any unlocked roles and permissions.

Open Account



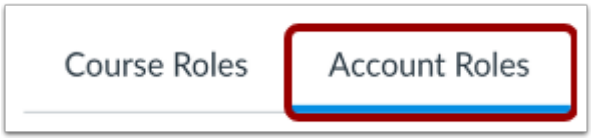
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Permissions



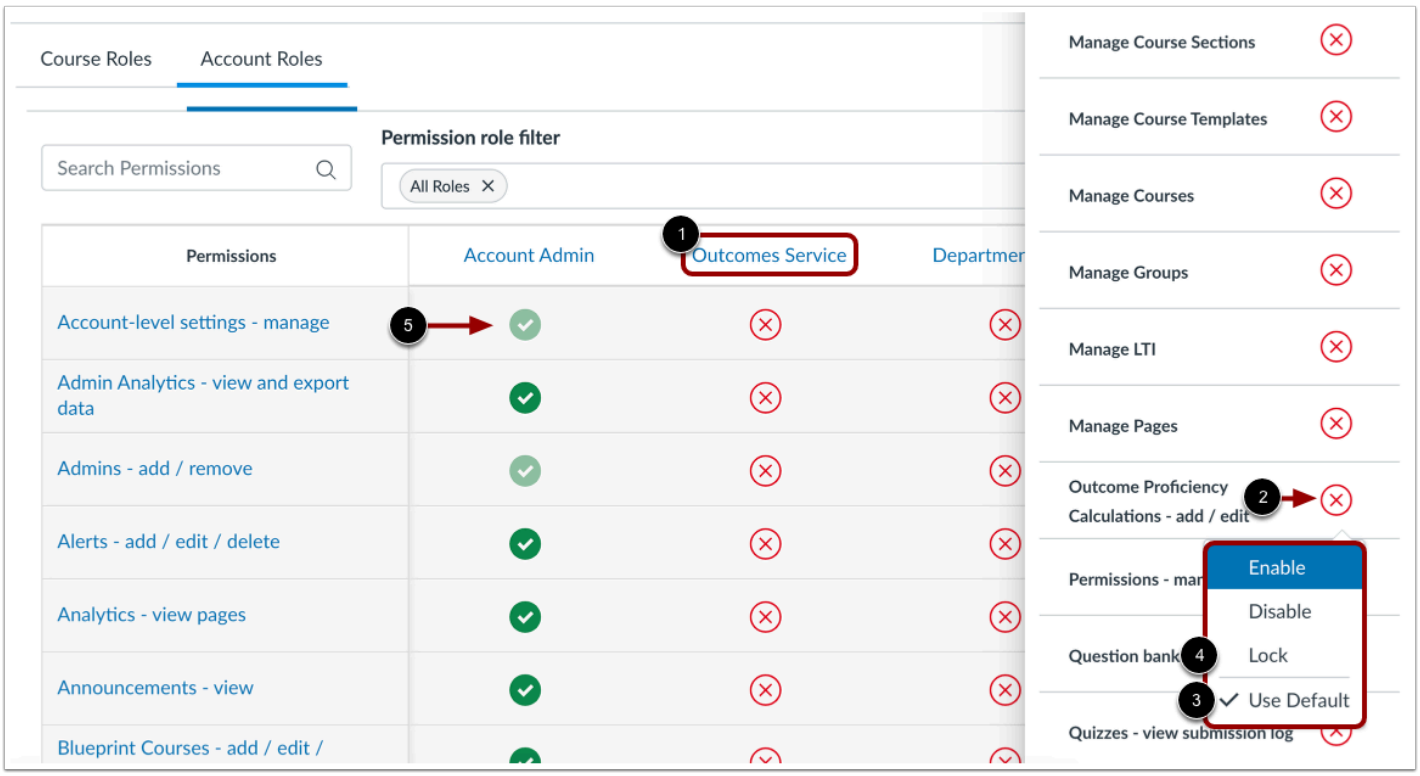
In Account Navigation, click the **Permissions** link.

Open Account Roles



Click the **Account Roles** tab.

Manage Permissions

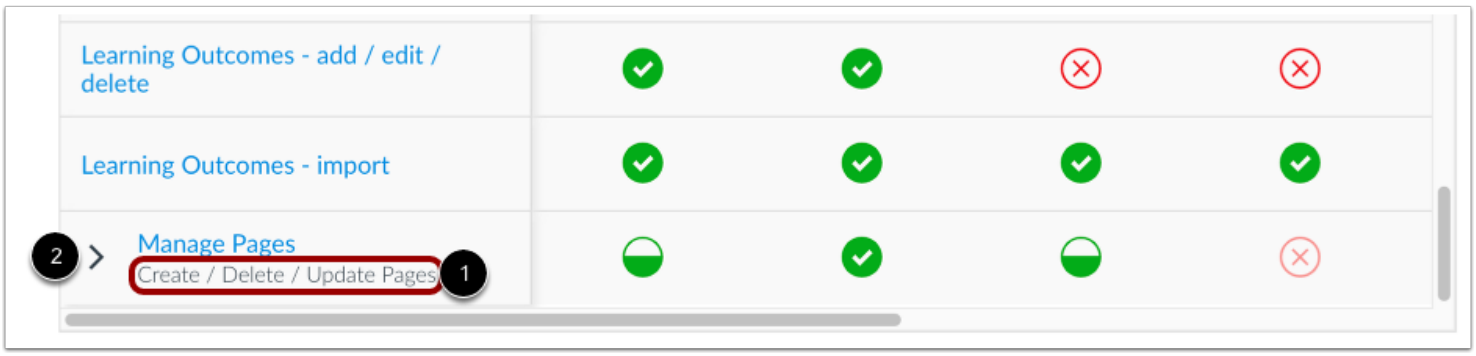


To override any permissions, locate and click the name of the user role [1]. Click the icon next to the name of a permission [2]. In the permission menu, the existing permission is indicated by a checkmark [3].

Choose the new permission status by clicking one of the permission options: Enable or Disable. After you enable or disable the permission, you can choose to lock the permission status. Click the **Lock** option to lock the permission status [4]. Locked options keep the setting from being changed by subaccount admins in a lower account. The new permission status is saved automatically.

Note: If a permission icon does not display as opaque, you cannot change the permission [5].

View Grouped Permissions

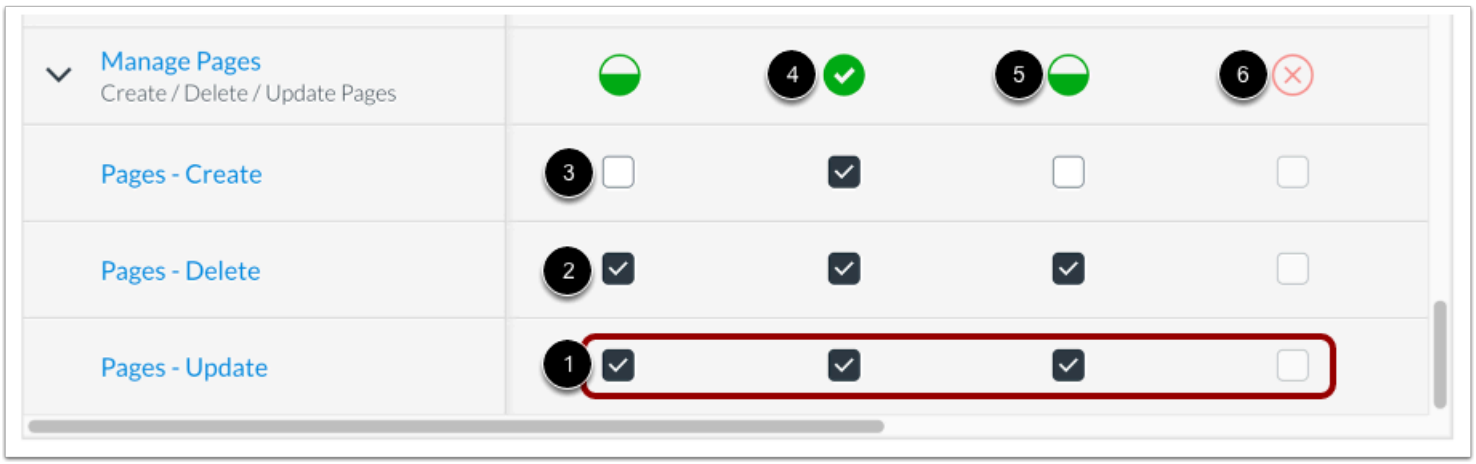


Some permissions may be grouped together to allow for greater granularity and control over permissions.

Grouped permissions list the grouped permissions below the grouped permission name [1].

To expand grouped permissions, click the expand icon [2].

Manage Grouped Permissions



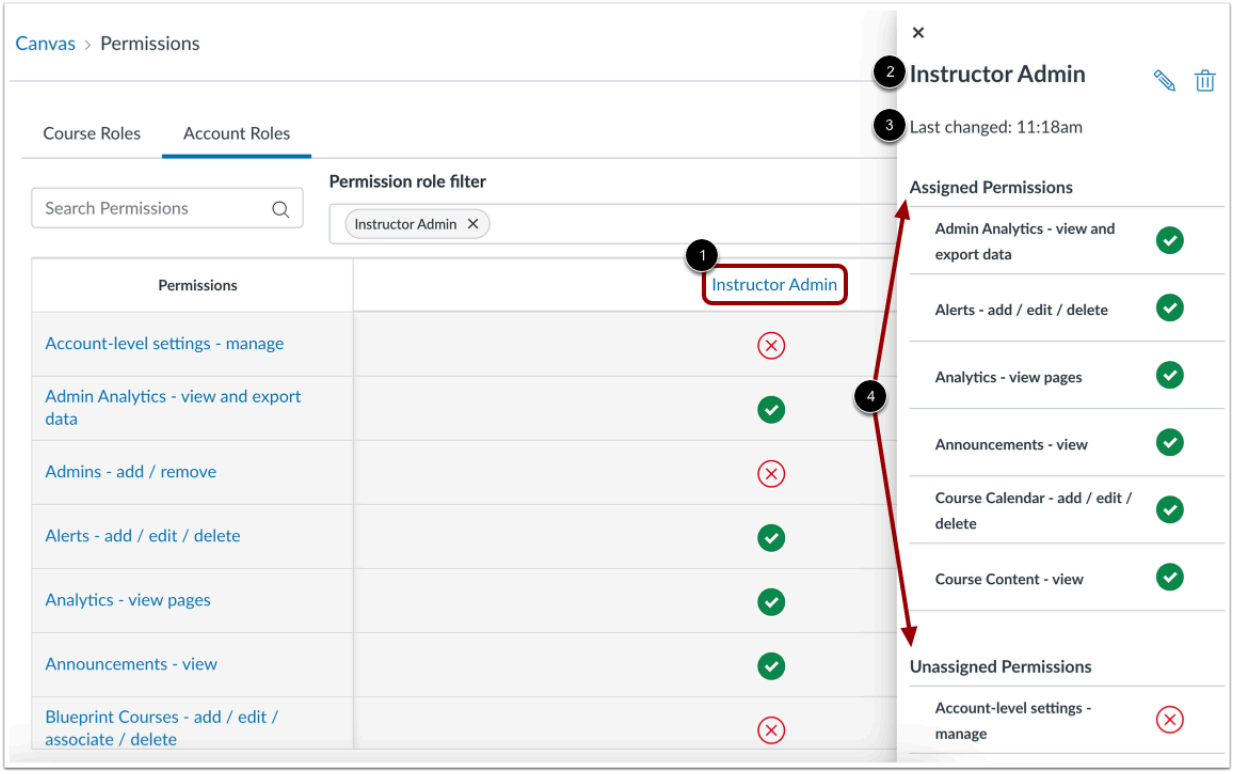
You can manage each granular permission within the group with the corresponding checkboxes. To enable or disable a granular permission, click the checkbox [1]. A checked box indicates the permission is enabled [2]. An unchecked box indicates the permission is disabled [3].

If all permissions are enabled for a user role, the permission group displays a checkmark icon [4].

If some permissions are enabled and some are disabled for a user role, the permission group displays a half-filled icon [5].

If all permissions are disabled for a user role, the permission group displays an X icon [6].

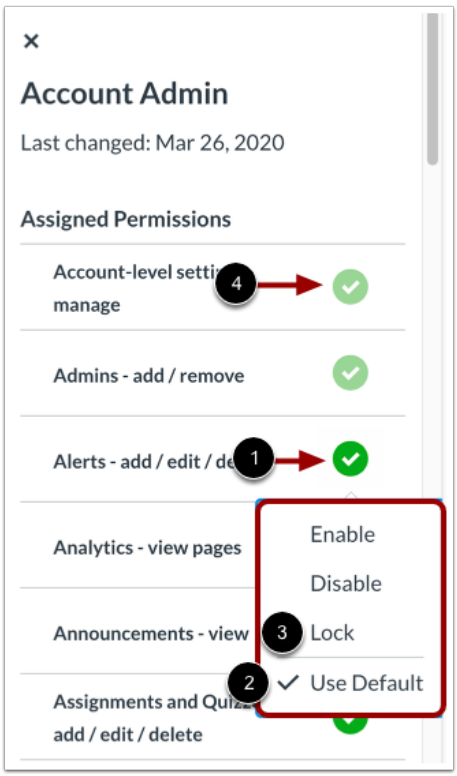
View User Role Permissions



To view permissions for an individual user role, click the role name [1].

In the sidebar, you can view the role name [2], the time or date that permissions for the user role were last changed [3], and the user's assigned and unassigned permissions [4].

Manage User Role Permissions

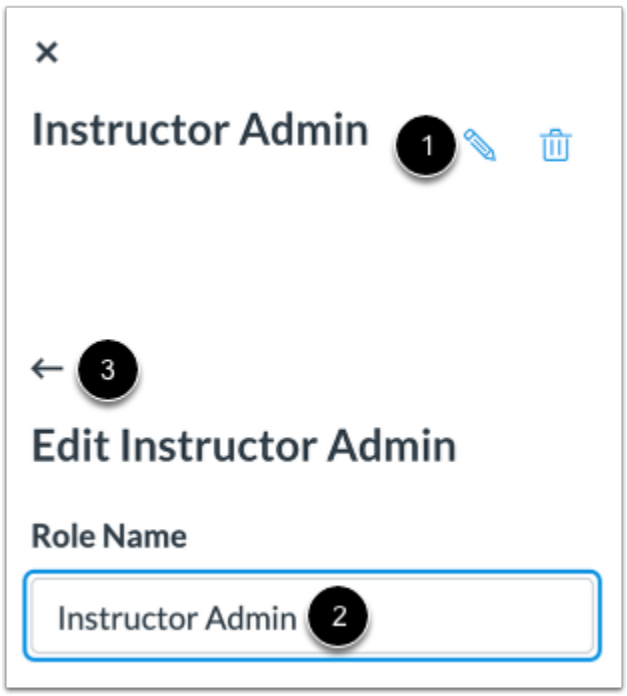


To manage user permissions from the sidebar, Click the icon next to the name of a permission [1]. In the permission menu [2], the existing permission is indicated by a check mark.

Choose the new permission status by clicking one of the permission options: Enable or Disable. After you enable or disable the permission, you can choose to lock the permission status. Click the Lock option to lock the permission status [3]. Locked options keep the setting from being changed by subaccount admins in a lower account. The new permission status is saved automatically.

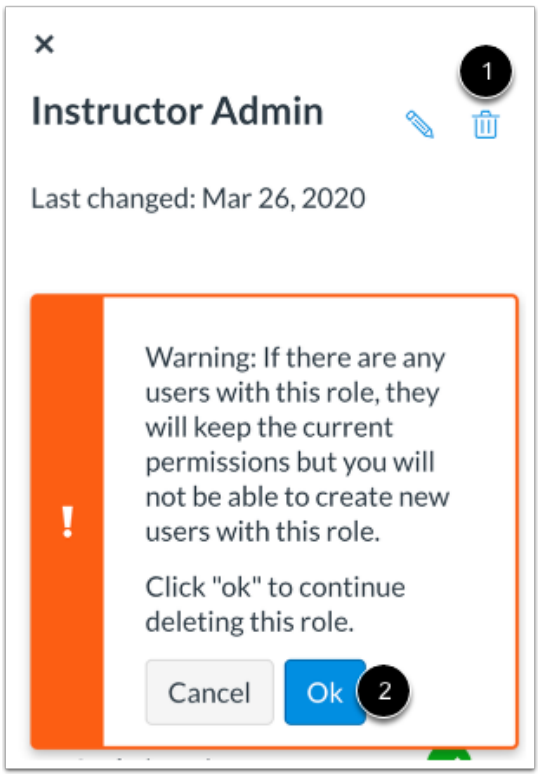
Note: If a permission icon does not display as opaque, you cannot change the permission [4].

Edit User Role



To edit the name of the user role, click the **Edit** icon [1]. Edit the name of the user role [2], then click the **Back** arrow [3].

Delete User Role



To delete a user role, click the **Delete** icon [1]. Review the warning about user roles—any users with the role you are deleting will keep the current permissions, but no new users can be created with the user role.

Deleting a user role cannot be undone.

To confirm deletion of the user role, click the **Ok** button.

How do I 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.

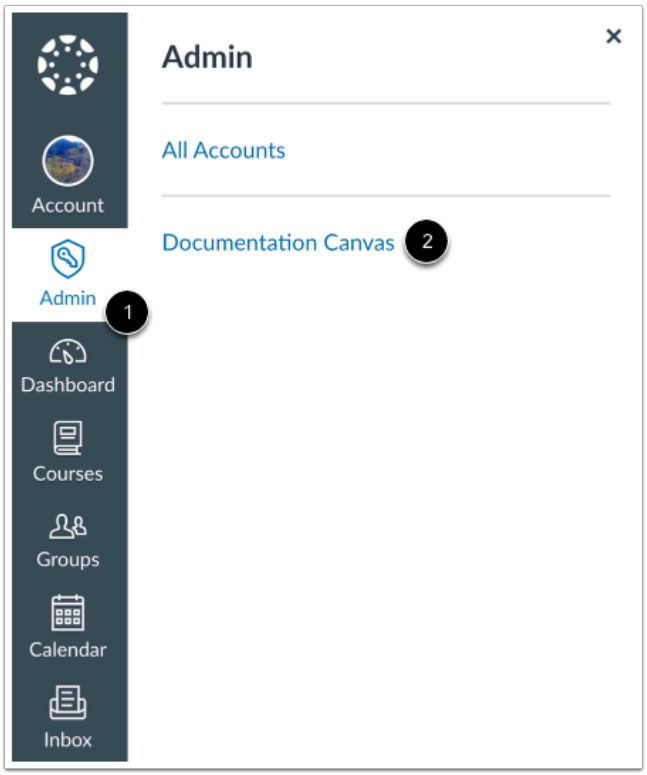
Depending on the role, you may want to override the defaults to create custom permissions.

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

Notes:

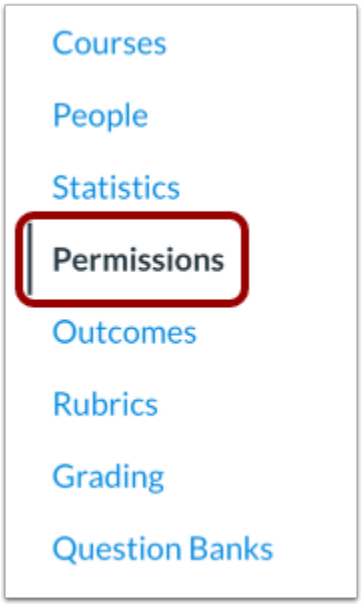
- When you change a permission, it can sometimes take 30 minutes or longer for that permission to take effect. If the expected changes do not appear immediately, try again after some time has passed.
- Child consortium accounts inherit roles and permissions from the parent account. Child accounts can edit any unlocked roles and permissions.

Open Account



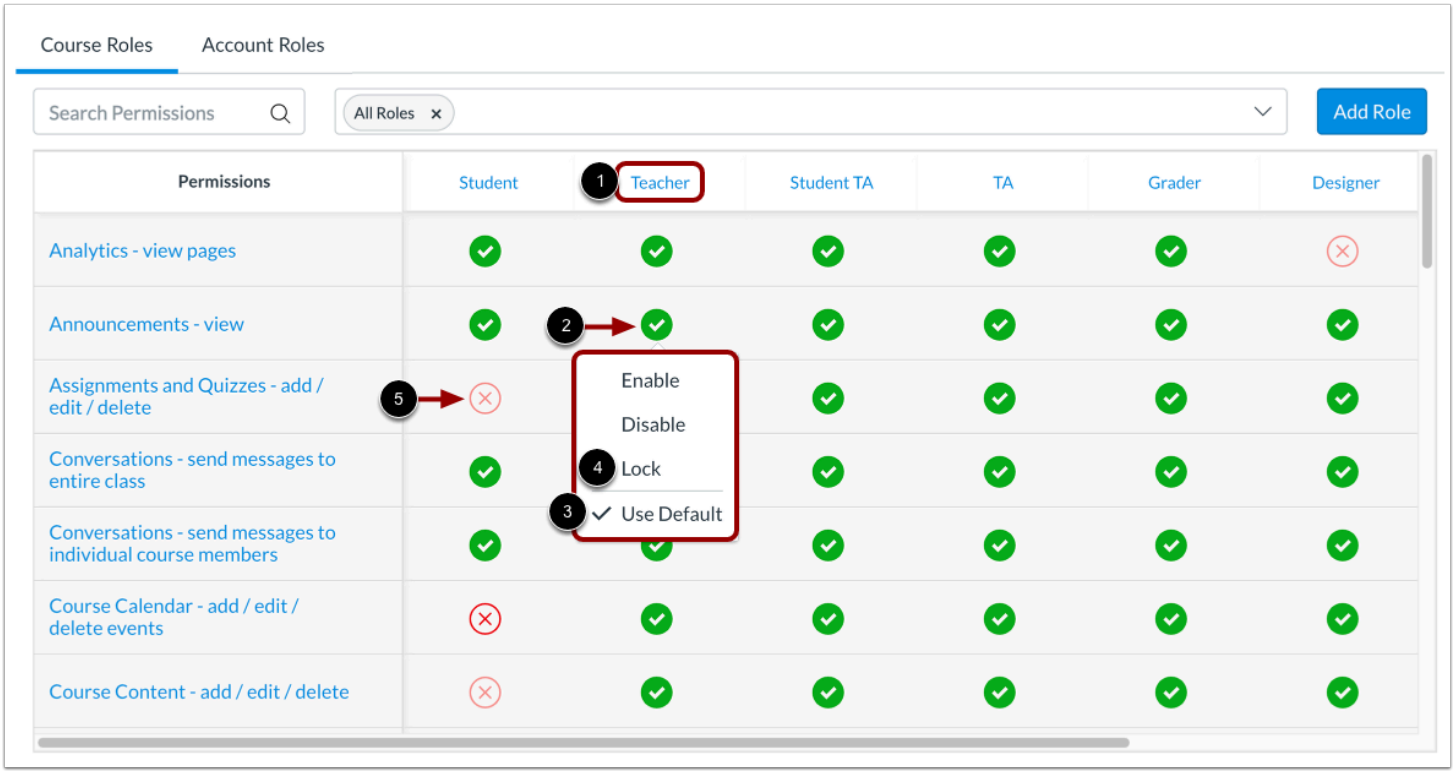
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Permissions



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

Manage Permissions

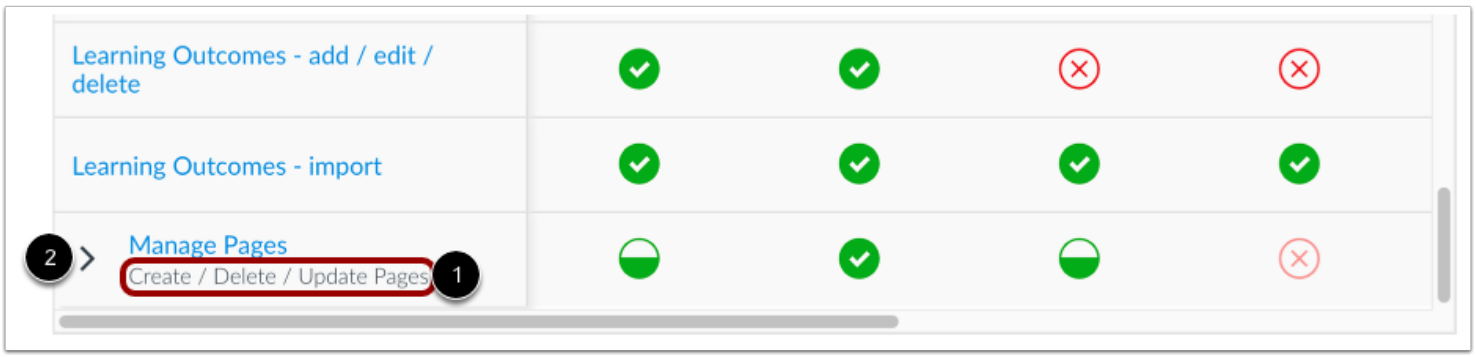


In the Course Roles tab, locate the name of the user role [1]. Click the icon next to the name of a permission [2]. In the permission menu [3], the existing permission is indicated by a check mark.

Choose the new permission status by clicking one of the permission options: Enable or Disable. After you enable or disable the permission, you can choose to lock the permission status. To lock the permission status, click the **Lock** option [4]. Locked options keep the setting from being changed by subaccount admins in a lower account. The new permission status is saved automatically.

Note: If a permission icon does not display as opaque, you cannot change the permission [5].

View Grouped Permissions

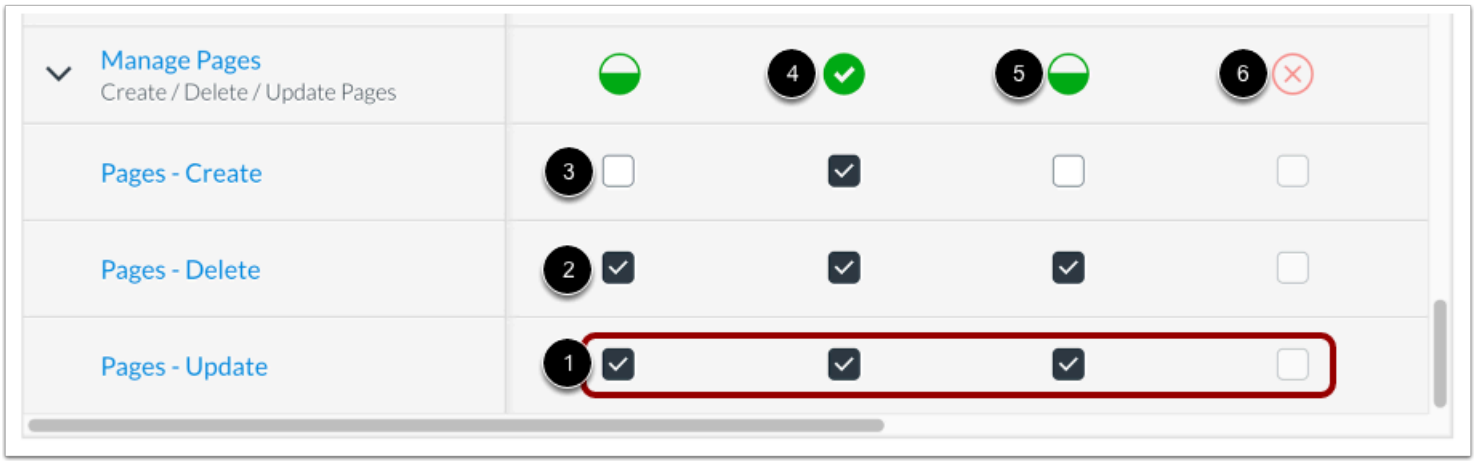


Some permissions may be grouped together to allow for greater granularity and control over permissions.

Grouped permissions list the grouped permissions below the grouped permission name [1].

To expand grouped permissions, click the expand icon [2].

Manage Grouped Permissions



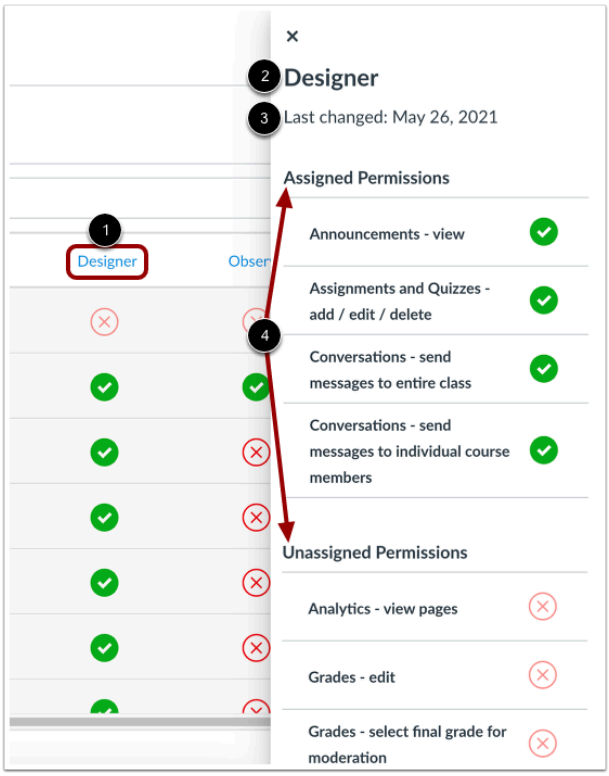
You can manage each granular permission within the group with the corresponding checkboxes. To enable or disable a granular permission, click the checkbox [1]. A checked box indicates the permission is enabled [2]. An unchecked box indicates the permission is disabled [3].

If all permissions are enabled for a user role, the permission group displays a checkmark icon [4].

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If all permissions are disabled for a user role, the permission group displays an X icon [6].

View User Role Permissions

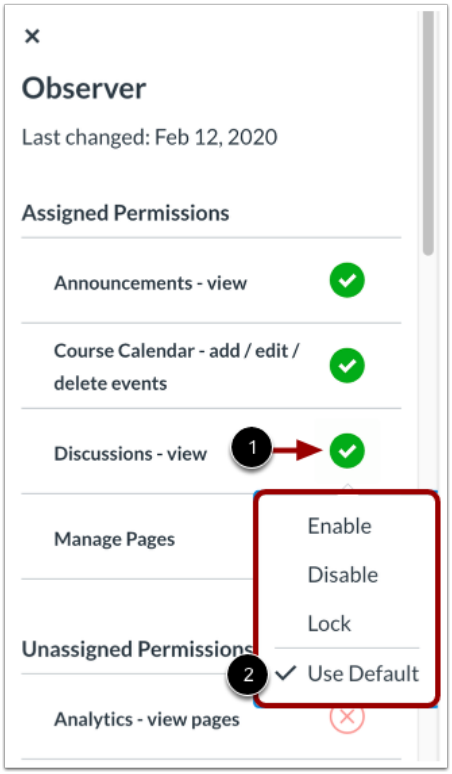


To view permissions for an individual user role, click the role name [1].

In the sidebar, you can view the role name [2]. If the user role is a custom role, you can also view the base role.

The sidebar also displays the time or date that permissions for the user role were last changed [3], and the user's assigned and unassigned permissions [4].

Manage User Role Permissions

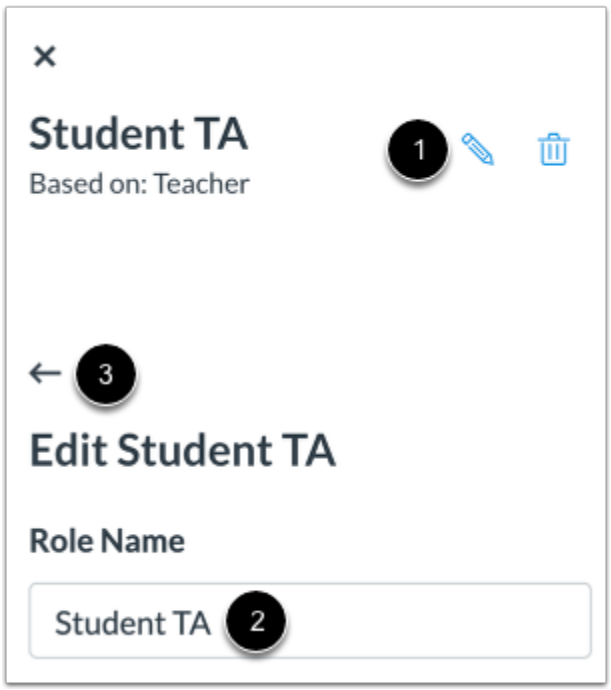


To manage user permissions from the sidebar, Click the icon next to the name of a permission [1]. In the permission menu [2], the existing permission is indicated by a check mark.

Choose the new permission by clicking one of the permission options: Enable, Enable and Lock, Disable, Disable and Lock, and Use Default. Locked options keep the setting from being changed by subaccount admins in a lower account. The new permission status is saved automatically.

Note: If a permission icon does not display as opaque, you cannot change the permission.

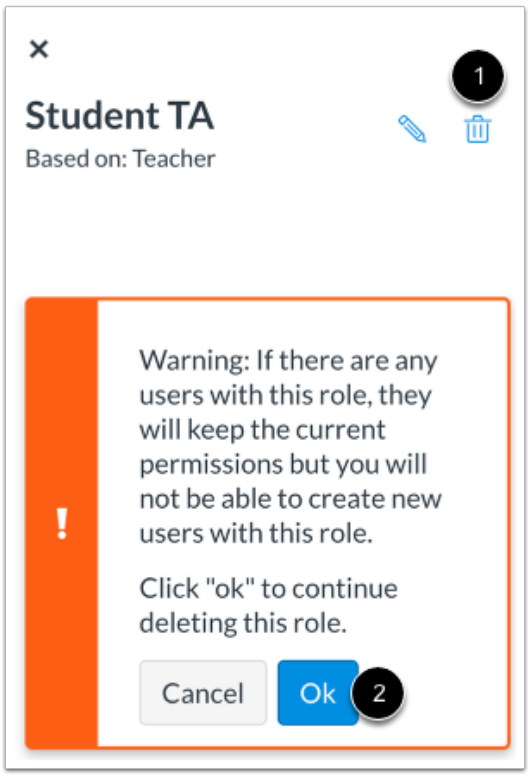
Edit User Role



If you have created a custom user role, you can edit the name of the user role if needed by clicking the **Edit** icon [1]. Edit the name of the user role [2], then click the **Back** arrow [3].

Note: Base roles cannot be edited.

Delete User Role



If you have created a custom role, you can delete the user role by clicking the **Delete** icon [1]. Review the warning about user roles—any users with the role you are deleting will keep the current permissions, but no new users can be created with the user role.

Deleting a user role cannot be undone.

To confirm deletion of the user role, click the **Ok** button [2].

Note: Base roles cannot be deleted.

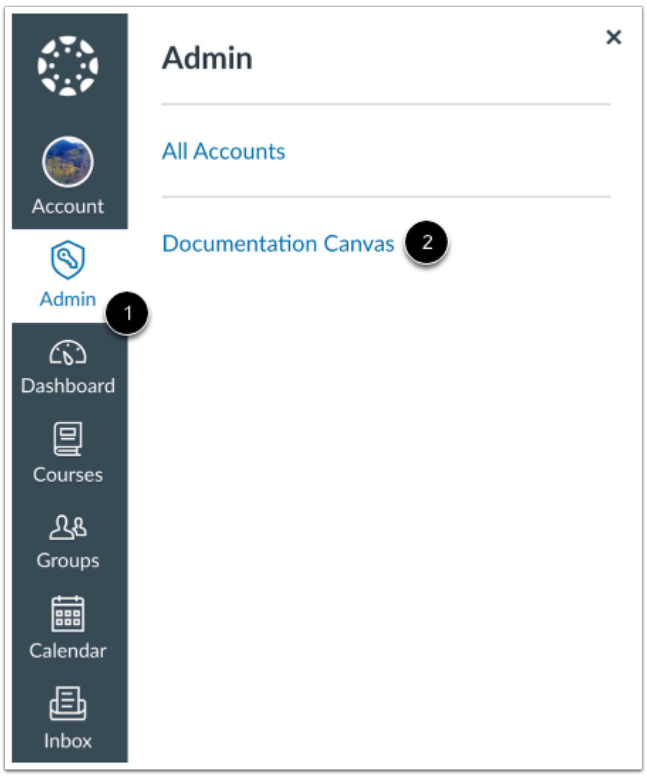
Rubrics

How do I manage rubrics in an account?

You can create, edit, and delete 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.

Note: If the steps in this lesson do not match what is displayed in your account, learn how to manage rubrics in the Enhanced Rubrics interface.

Open Account



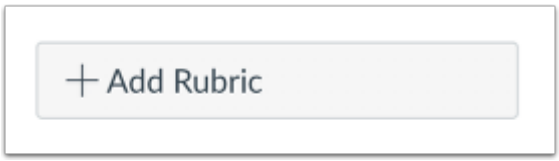
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Rubrics



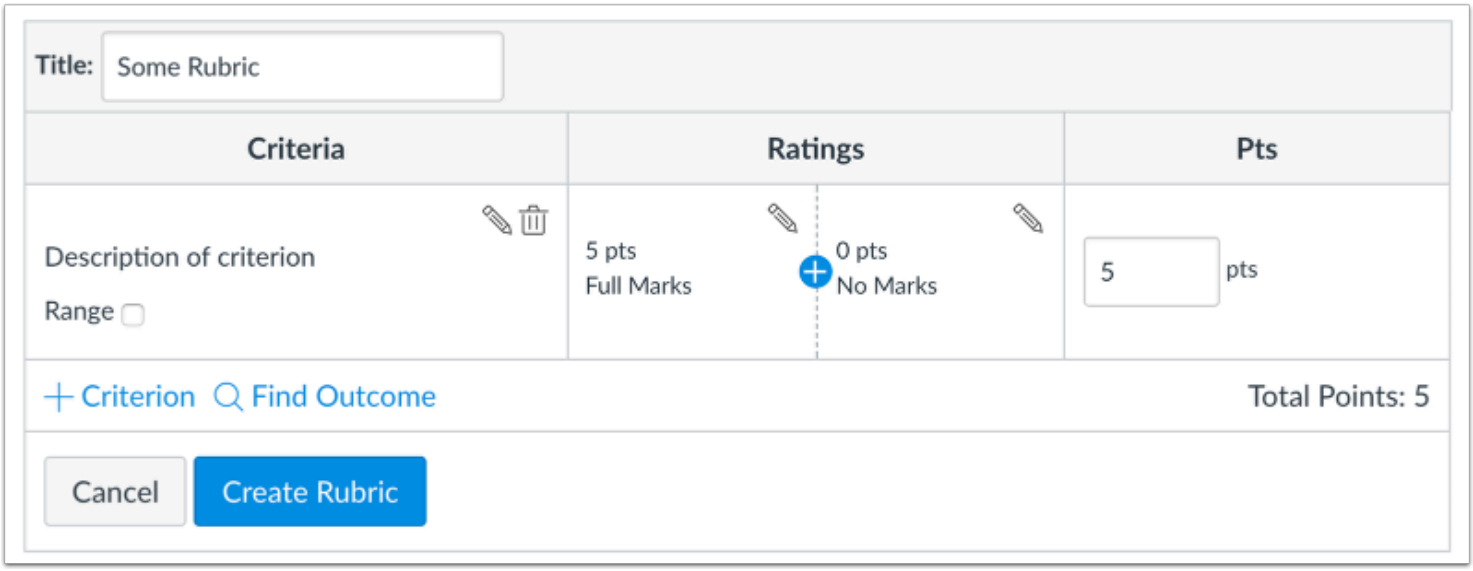
In Account Navigation, click the **Rubrics** link.

Add Rubric



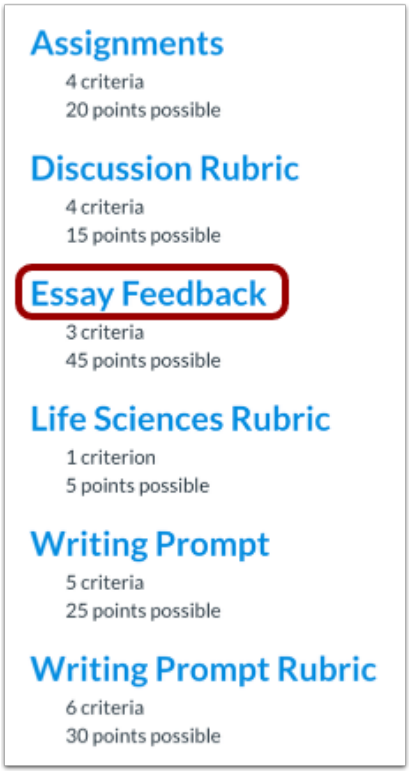
To add a new rubric, click the **Add Rubric** button.

Add Details



Add details to the rubric.

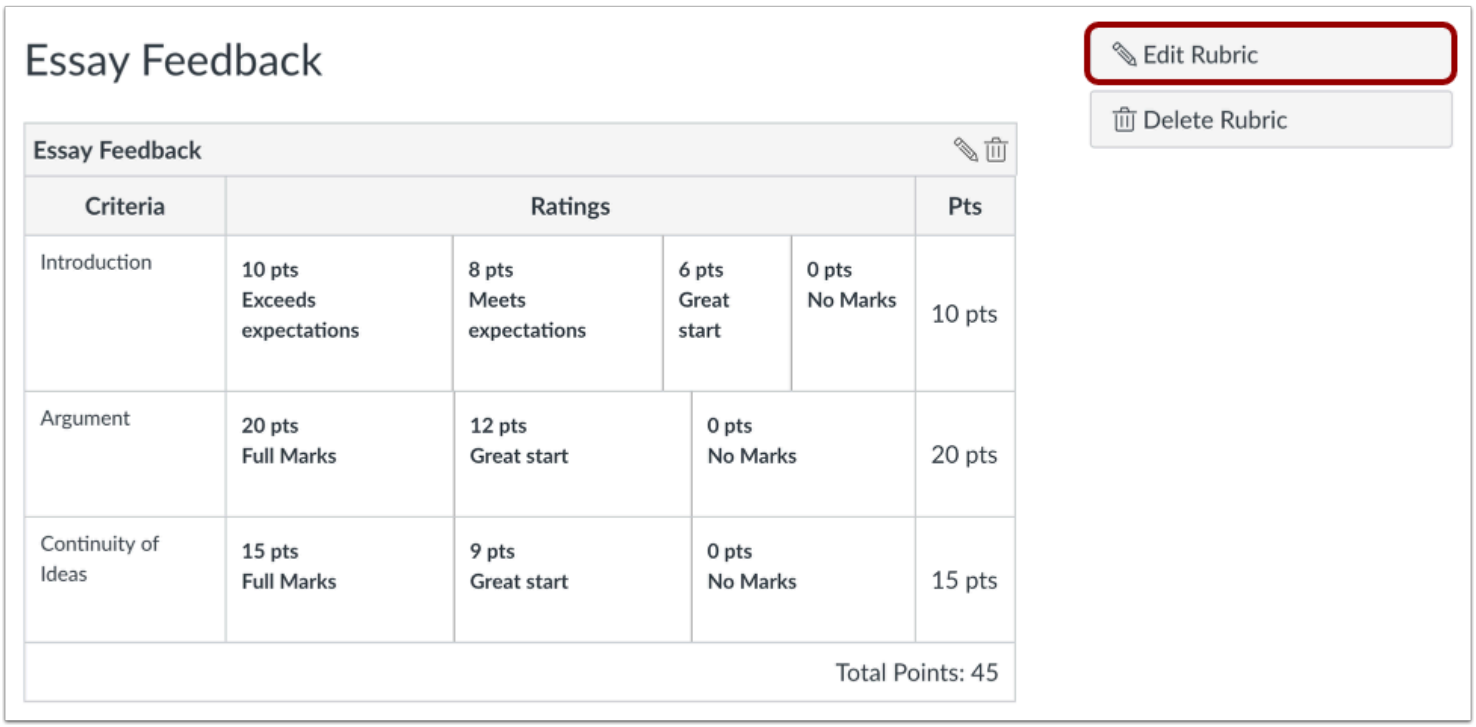
Manage Existing Rubric



Click the name of the rubric you want to edit or delete.

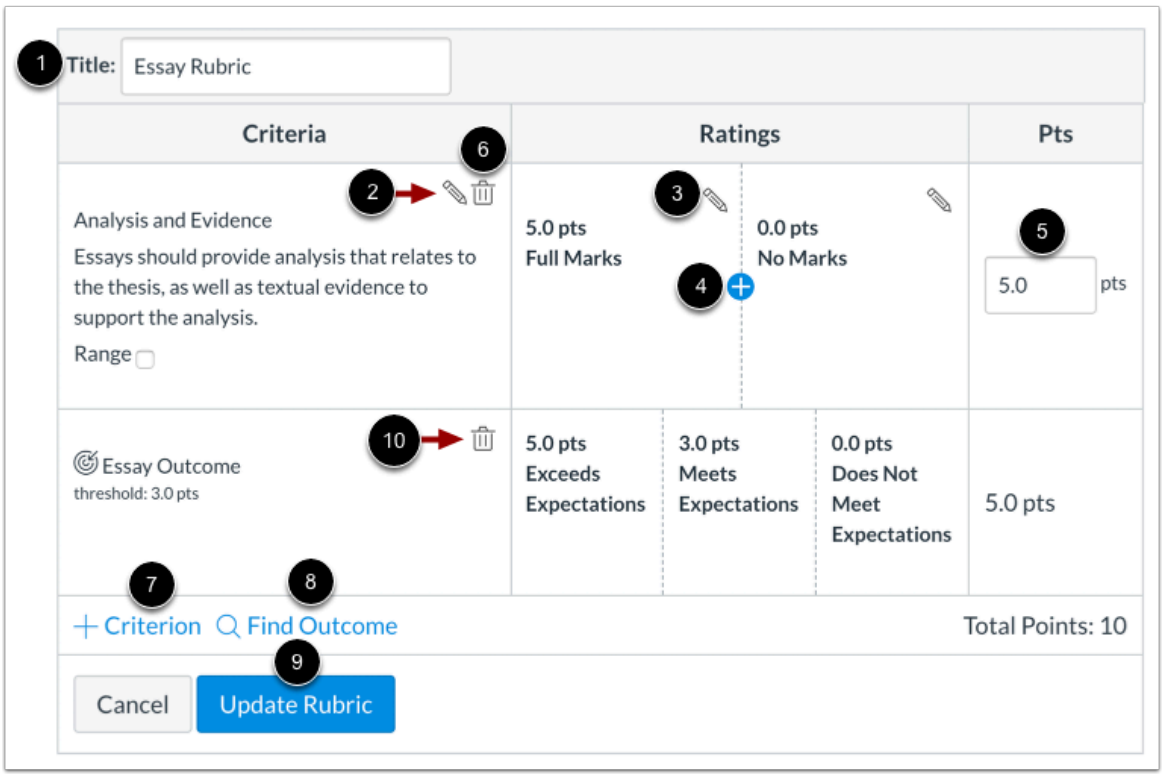
Note: Rubrics that have been used in more than one place cannot be modified.

Edit Rubric



To edit your rubric, click the **Edit Rubric** button.

Edit Rubric Details



To rename a rubric, type in the **Title** field [1].

To edit a rubric criteria description or long description, click the criteria **Edit** icon [2]. You can also edit criteria ratings [3], add rating options [4], and edit points [5].

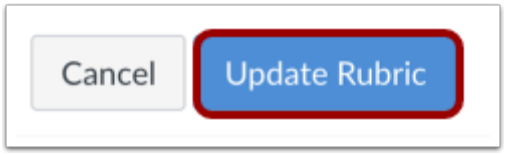
To delete a criteria from the rubric, click the criteria **Delete** icon [6].

You can also add new criterion [7] and outcomes [8].

To save your edits, click the **Update Rubric** button [9]

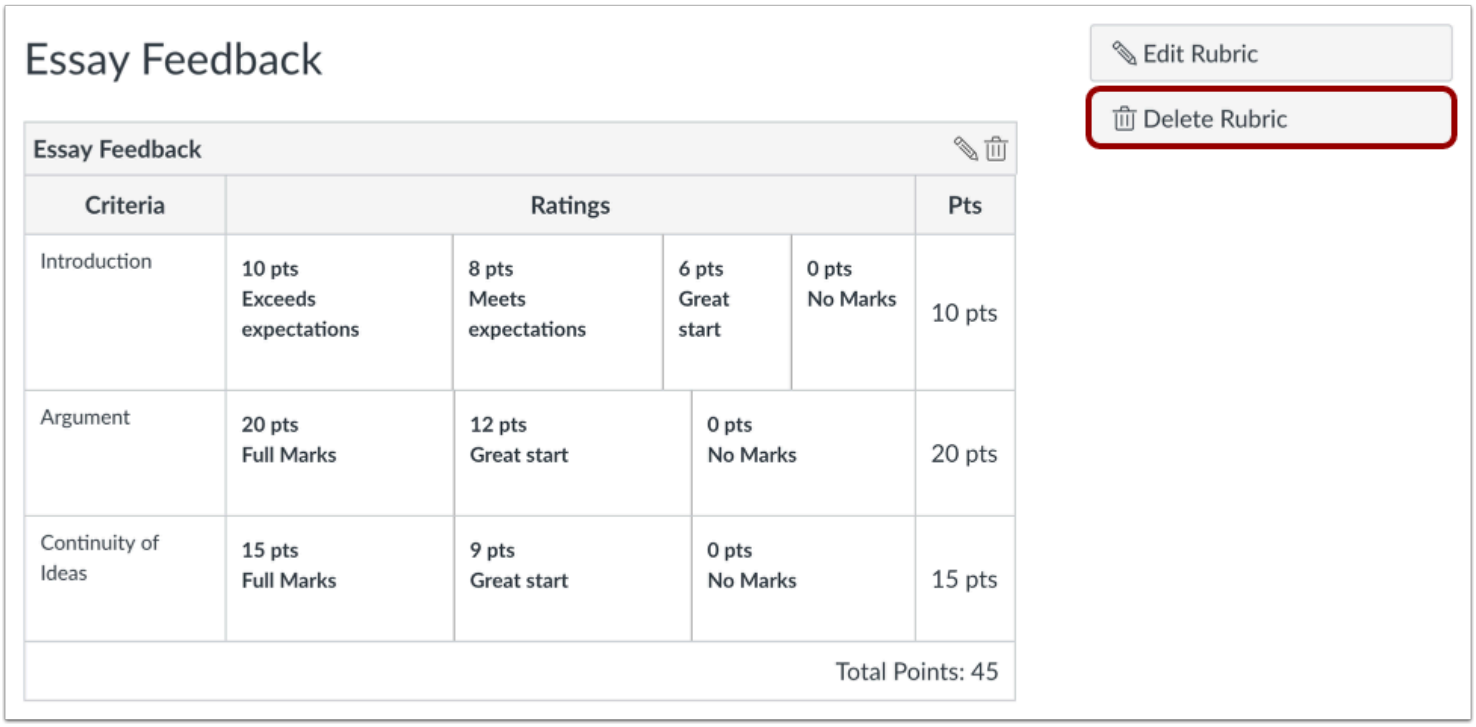
To remove associated outcome criteria from a rubric, click the **Delete** icon [10]. Outcome criteria can only be edited from the Outcomes page.

Update Rubric



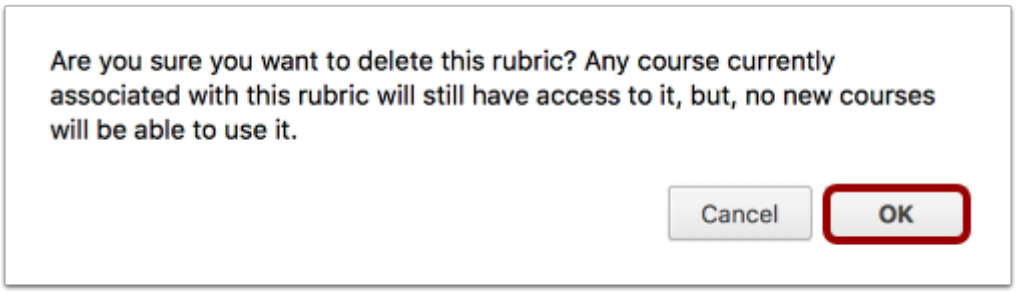
To save any edits you've made to the rubric, click the **Update Rubric** button.

Delete Rubric



Click the **Delete Rubric** button.

Confirm Deletion



Click the **OK** button.

When you delete a rubric, any course currently using the rubric will still have access to the rubric, but it will no longer be included in new courses.

How do I add a rubric in an account?

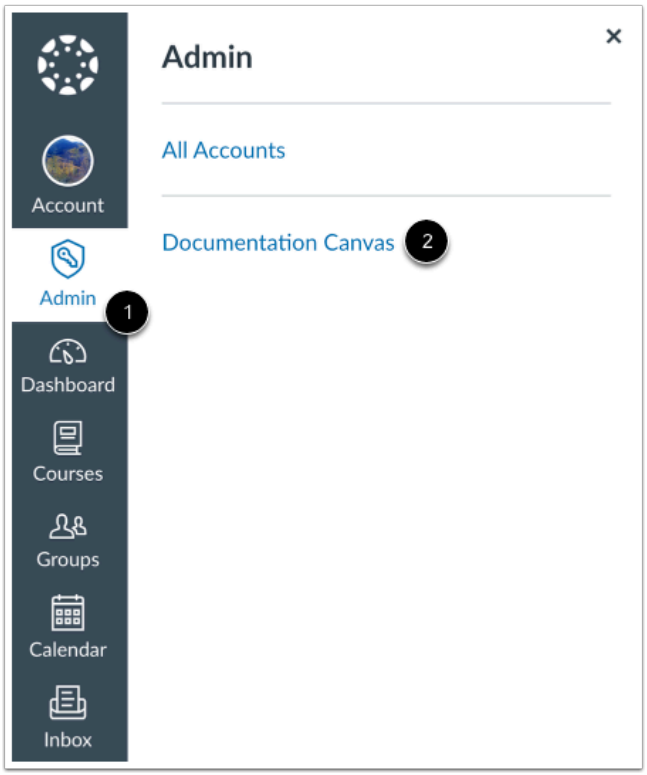
You can create rubrics for instructors to use across your institution. Instructors can add account-level rubrics to their assignments, graded discussions, and quizzes. Instructors can also create their own rubrics in their courses.

Rubric criteria can include a point range or an individual point value. Rubrics can also be set as non-scoring rubrics, which allows for the use of rubrics without point values.

Notes:

- You cannot move criterion using the classic Rubric interface.
- If the steps in this lesson do not match what is displayed in your account, learn how to add a rubric in the Enhanced Rubrics interface.

Open Account



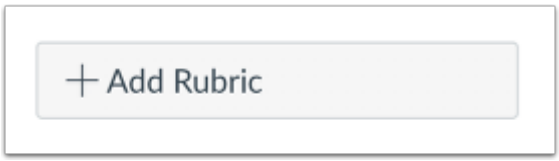
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Rubrics



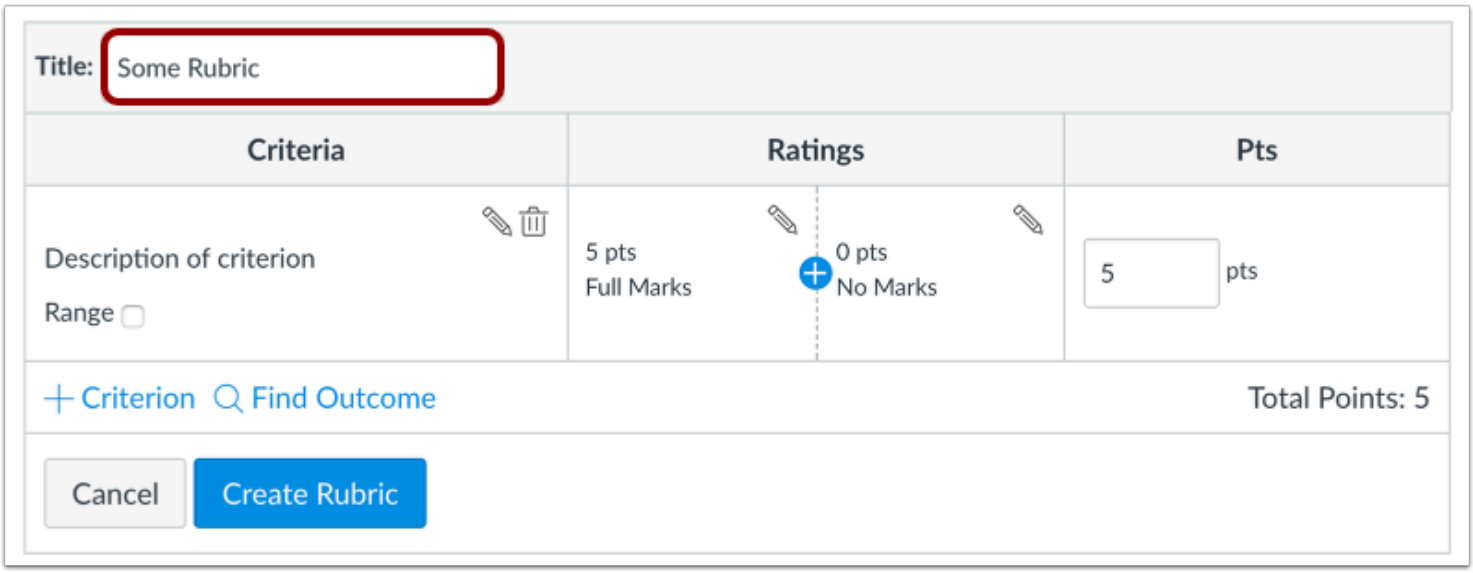
In Account Navigation, click the **Rubrics** link.

Add Rubric



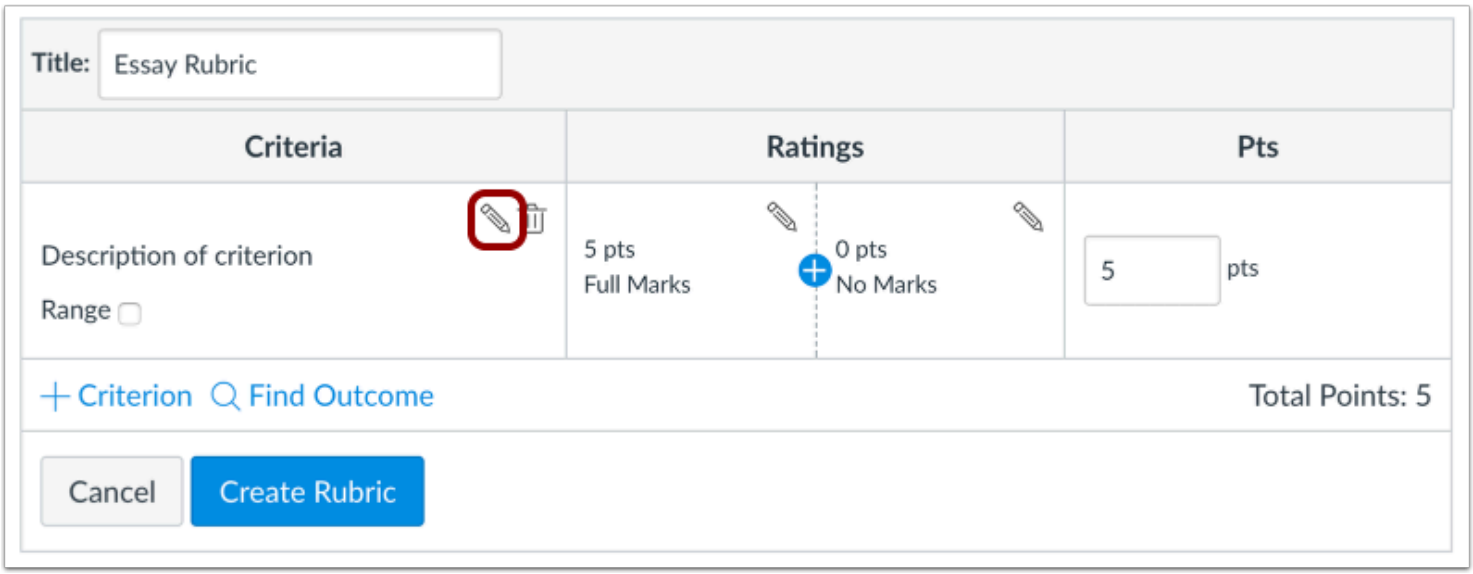
Click the **Add Rubric** button.

Add Title



In the **Title** field, add a title for the rubric. This title helps instructors identify the rubric so they can associate it with an assignment, graded discussion, or quiz.

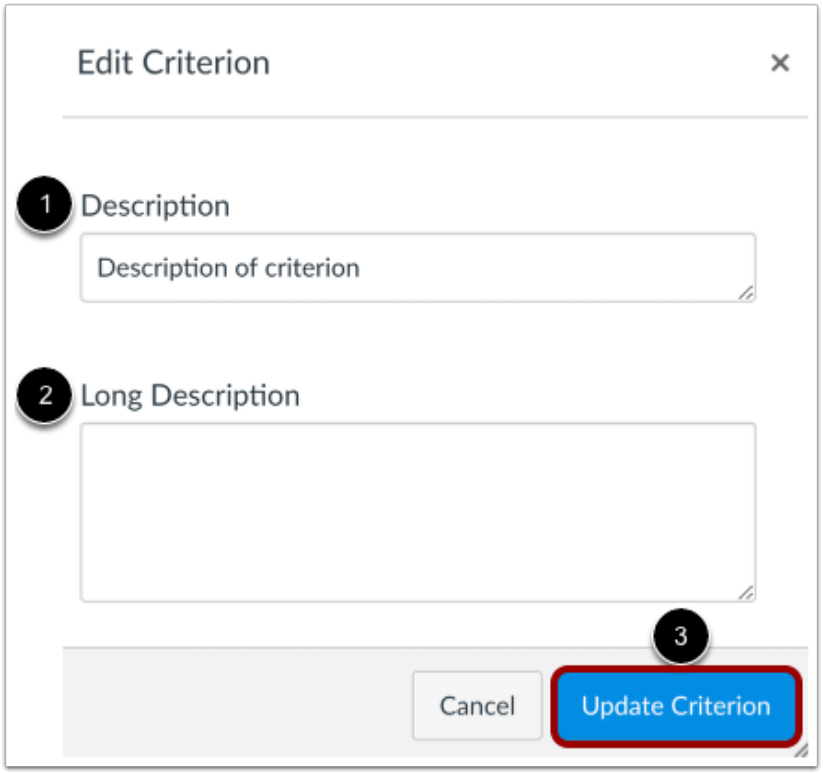
Edit Criterion Description



The rubric includes one default criterion entry. To edit the criterion description, click the **Edit** icon.

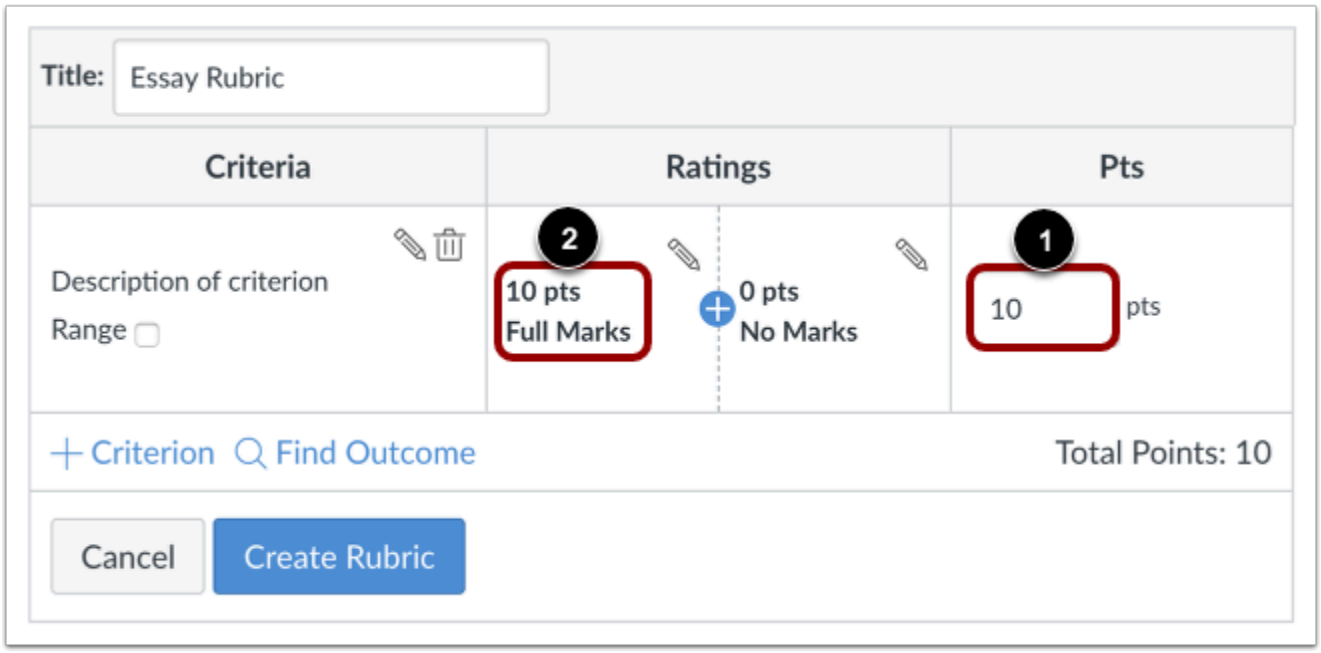
Note: You cannot move criterion using the classic Rubric interface. If you want to display criterion in a specific order, make sure you create them in the order that you prefer.

Enter Descriptions



Enter a short description for the criterion in the **Description** field [1]. To add a longer description to the criterion, enter a longer description [2]. The longer description provides students more information about the criterion. Click the **Update Criterion** button [3].

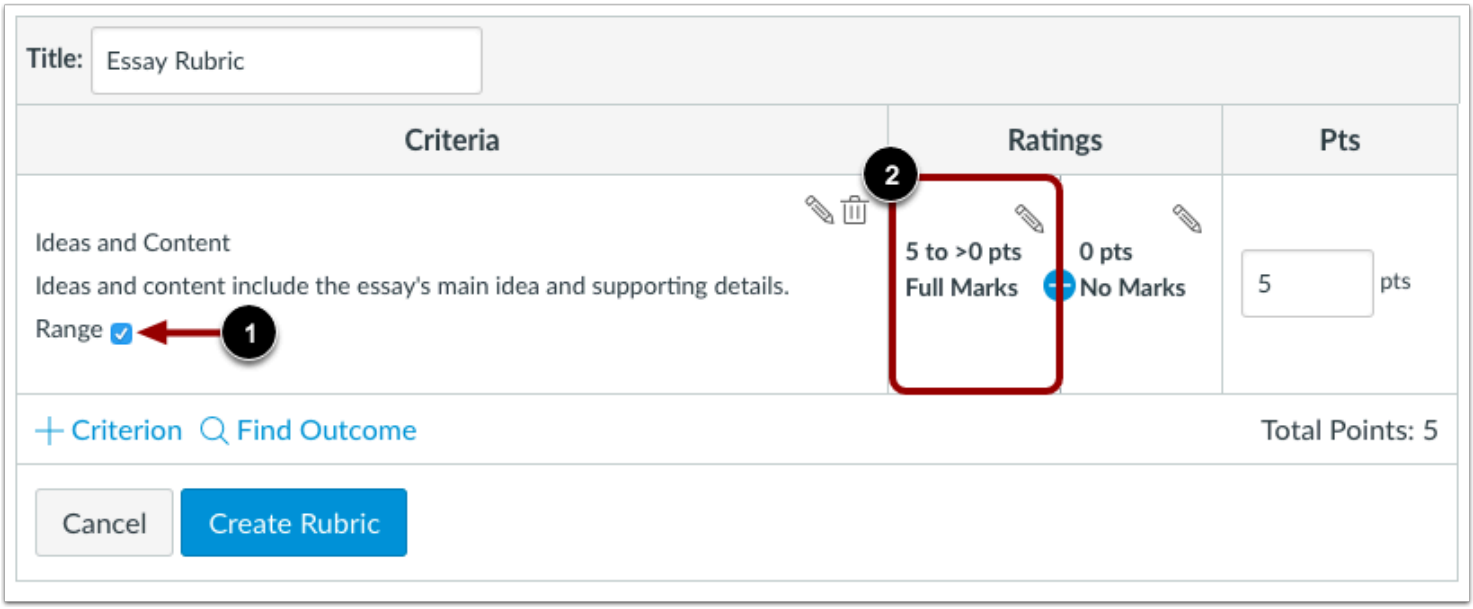
Edit Total Point Value



Rubric ratings default to 5 points, awarding 5 points for full rubric marks and 0 points for no rubric marks.

If you want to adjust the total point value of the criterion, enter the number of points in the **Points** field [1]. The first rating (full marks) updates to the new total point value and any incremental ratings adjust appropriately [2].

Select Range

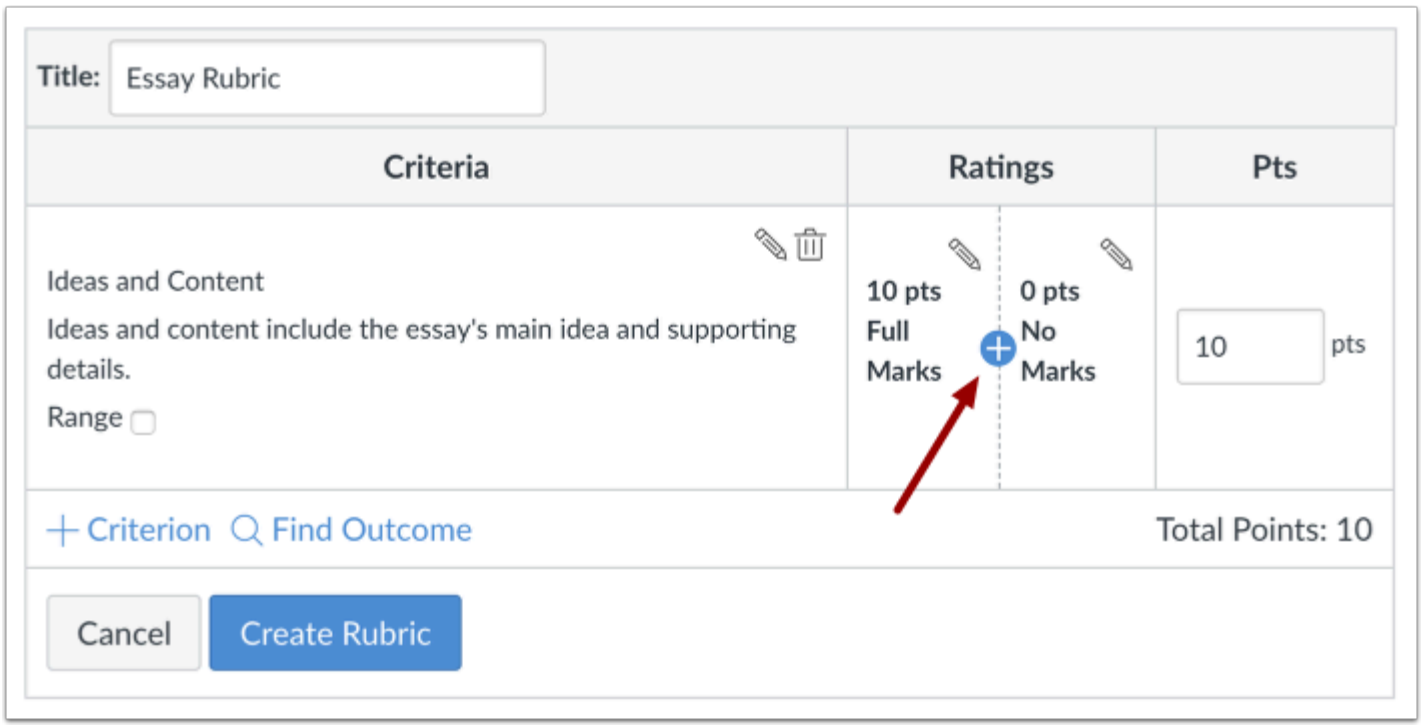


By default, rubric ratings are created as individual point values. If you want to create a point range instead, click the **Range** checkbox [1]. Ranges allow you to assign a rating for a range of point options instead of just one point value.

When enabled, the first rating (full marks) shows the total point value in a range format [2]. Each rating displays a maximum and minimum point value. For each rating, the maximum value is assigned as the point value.

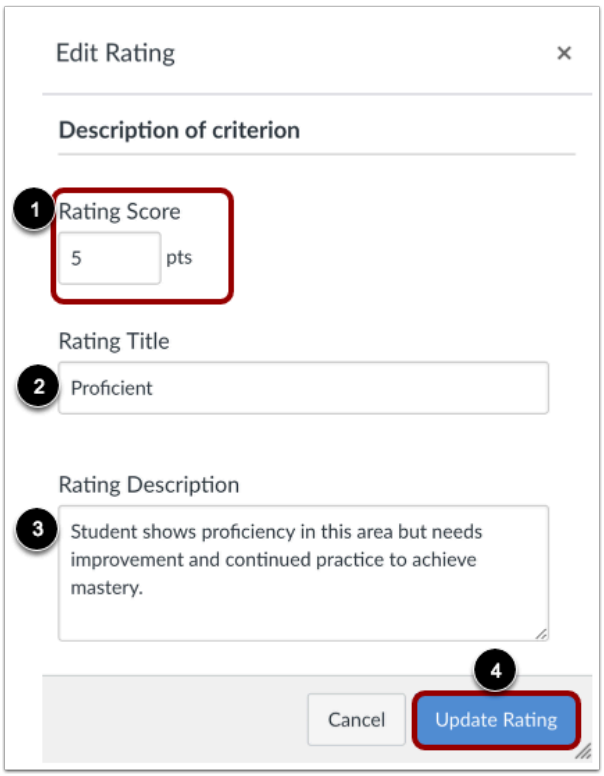
Except for the range value display, criterion ranges function the same way as individual point ratings. For instance, a range that includes a maximum of five points and a minimum of three points is assigned the full point value of five points.

Add Ratings



To add a new rating for the criterion, click the **Add** icon.

Update Rating



In the Edit Rating window, complete the rating criterion description.

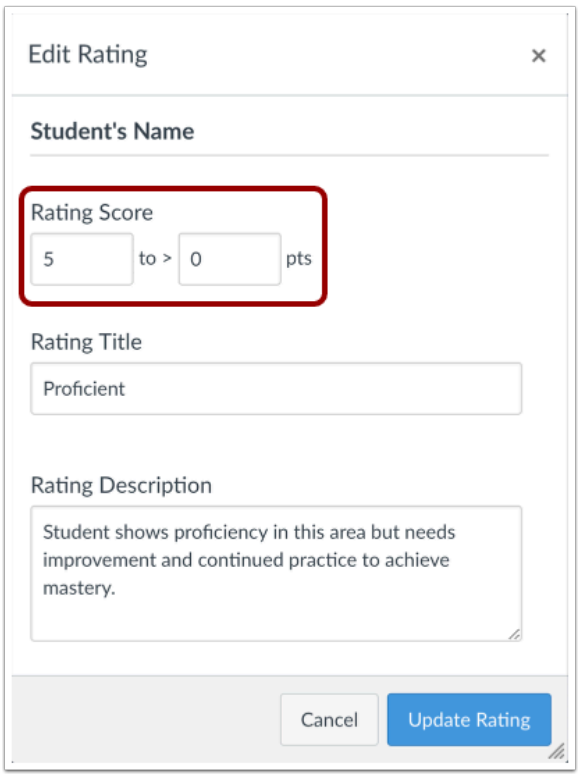
By default, the new rating points field displays the point value between the two existing ranges [1]. To change the point value for the rating score, enter the new point value in the Rating Score field. Points can be whole (1, 5, 10) or decimal (0.3, 0.5, 2.75) numbers.

In the **Rating Title** field [2], enter a title for the rating.

In the **Rating Description** field [3], enter a description for the rating.

Click the **Update Rating** button [4].

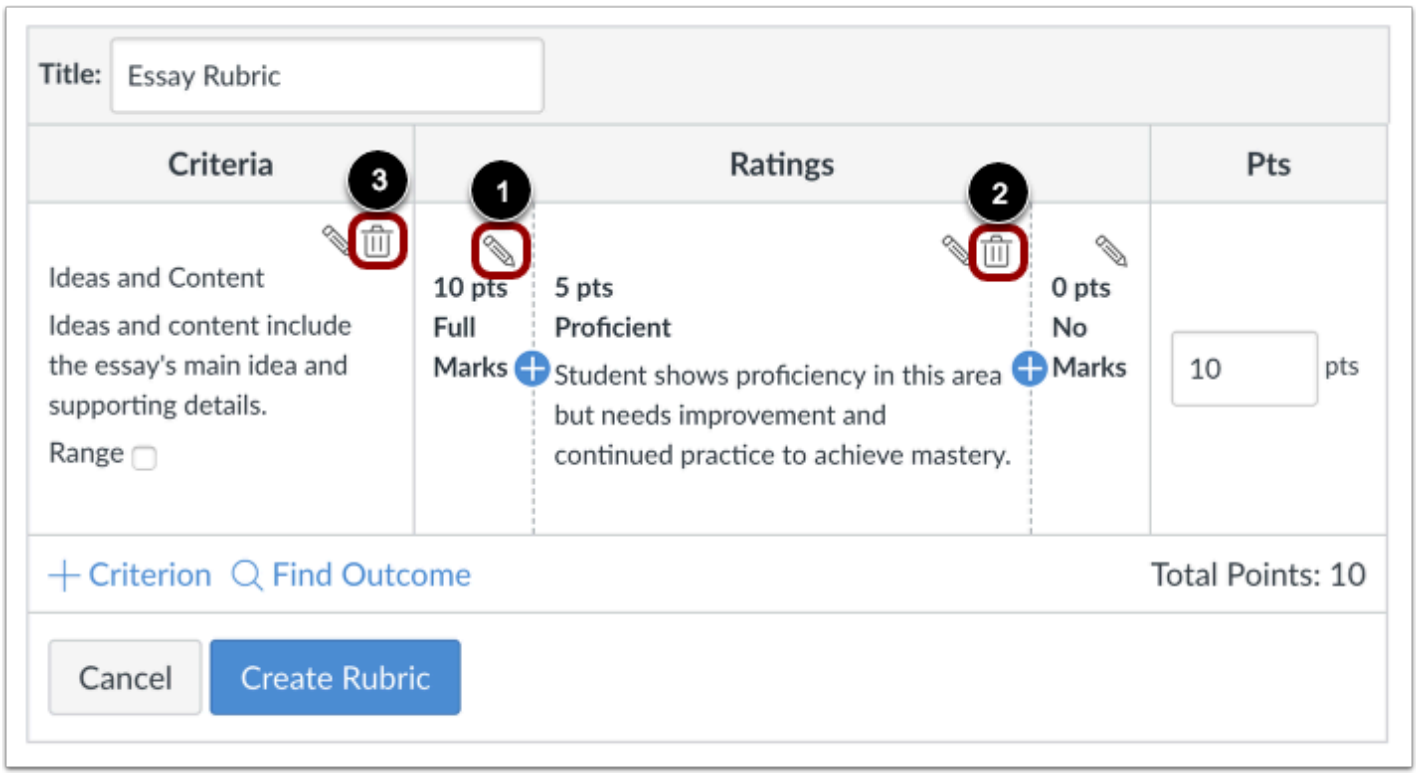
Update Range Rating



When ranges are enabled, the Rating Score field displays the point value between the two existing ranges. To change the point value for the rating score, enter the new point value in the Rating Score fields.

Point values for range ratings should be whole numbers.

Manage Criterion

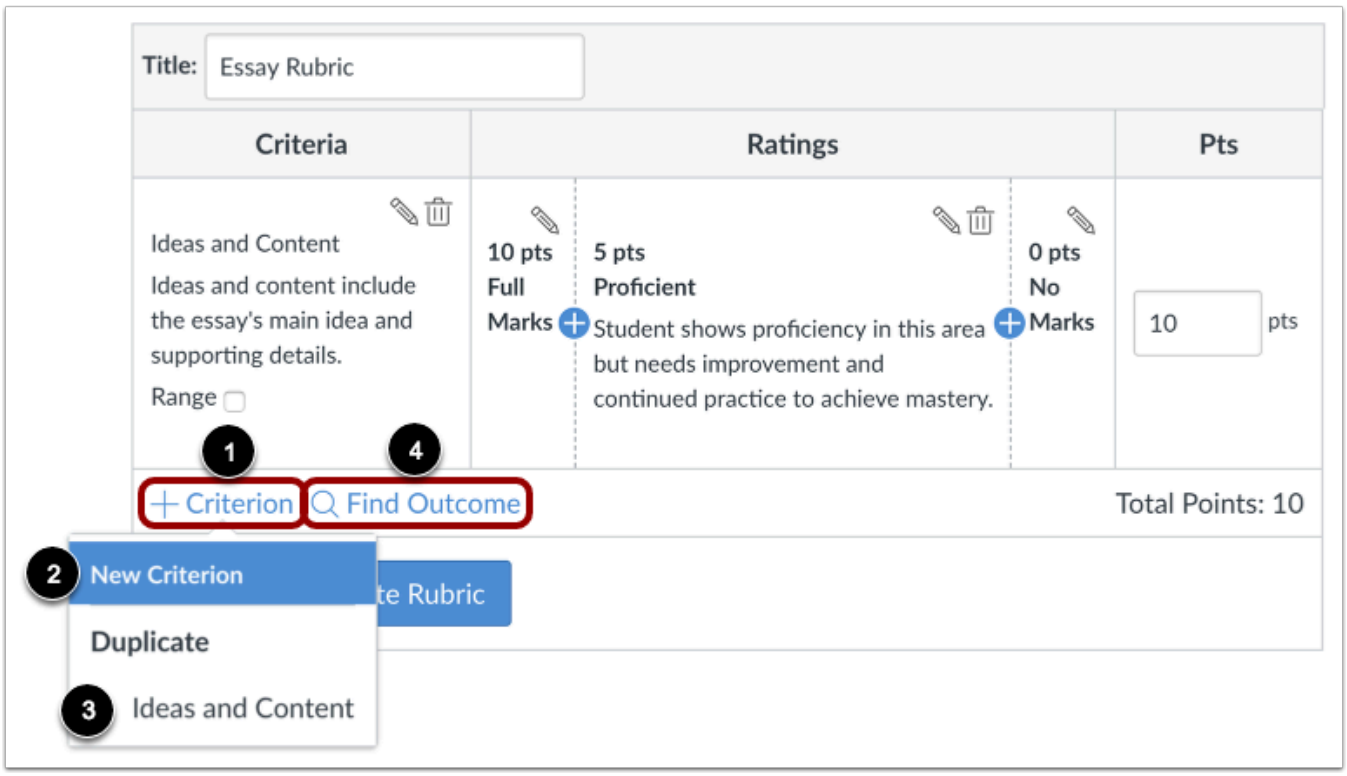


To edit a rating, click the **Edit** icon [1]. Editing a specific rating value affects the full point value for the criterion. If you adjust the point value of a rating, the value of all ratings will adjust and create the updated point value for the criterion.

To delete a rating, click the rating's **Delete** icon [2]. Note that you cannot delete the first and last rating for the criterion.

To delete the entire criterion, click the criterion **Delete** icon [3].

Add Criterion



To add another criterion, click the **Add Criterion** link [1]. To create a new criterion, click the **New Criterion** option [2]. To duplicate an existing criterion, click the name of the criterion you want to duplicate [3].

To find an outcome to align with the rubric, click the **Find Outcome** link [4].

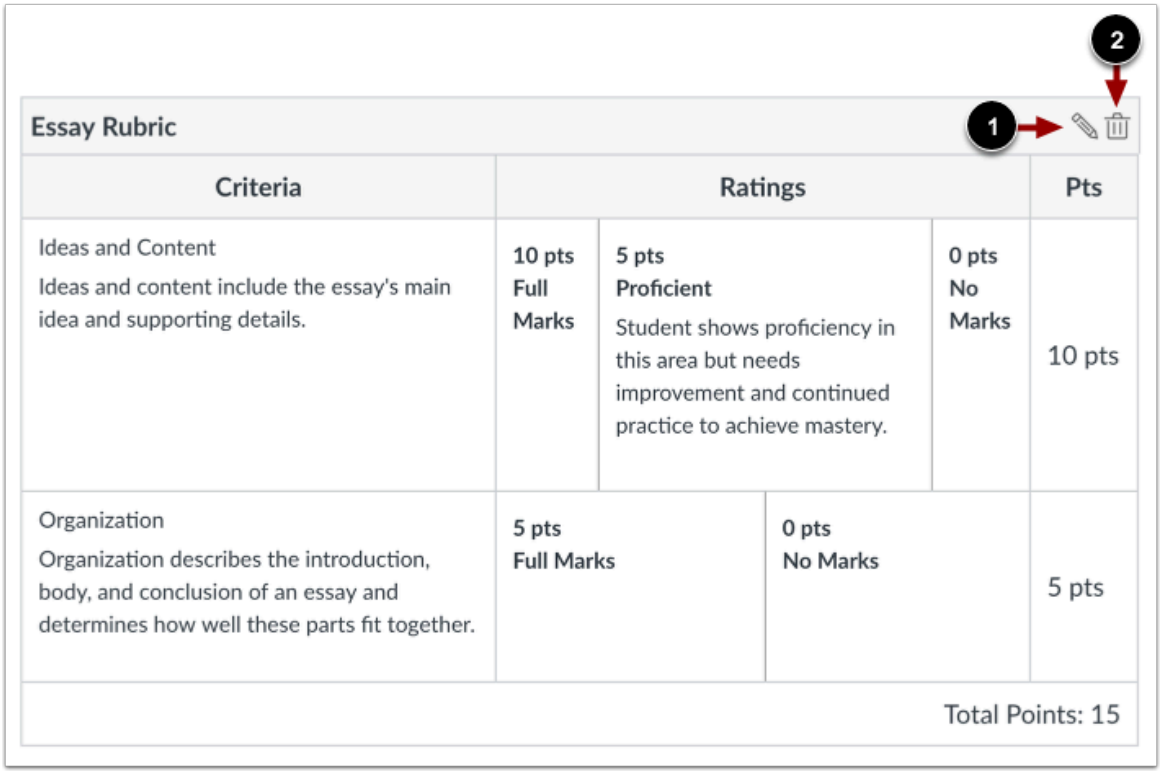
Note: Outcomes cannot be edited directly in a rubric.

Create Rubric



Click the **Create Rubric** button.

View Rubric



View the new rubric.

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

How do I align an outcome with a rubric in an account?

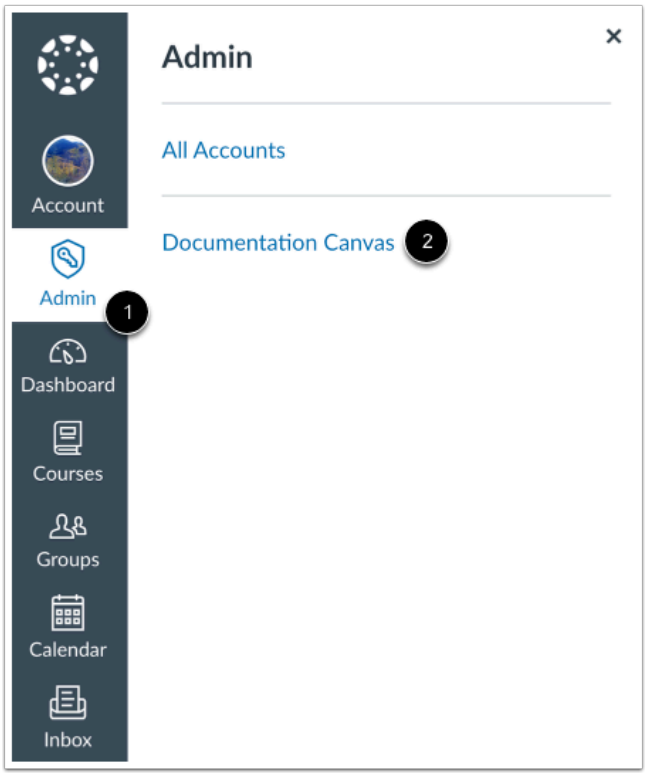
You can align any outcome in your account to a rubric. Rubrics are used to help students understand expectations for an assignment and how their submissions will be graded. Outcomes can be aligned with a rubric for additional assessment and measurable performance.

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

Notes:

- Outcomes can be added to rubrics, but rubrics cannot be added to outcomes.
- Rubrics cannot be edited once they have been added to more than one assignment in a course.
- If the steps in this lesson do not match what is displayed in your account, learn how to align an outcome with a rubric in the Enhanced Rubrics interface.

Open Account



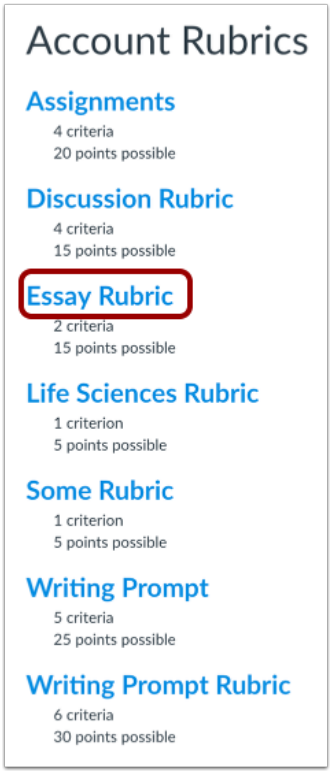
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Rubrics



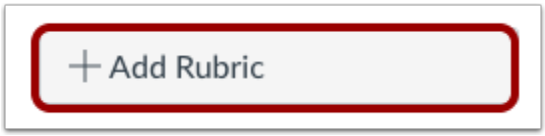
In Account Navigation, click the **Rubrics** link.

Open Rubric



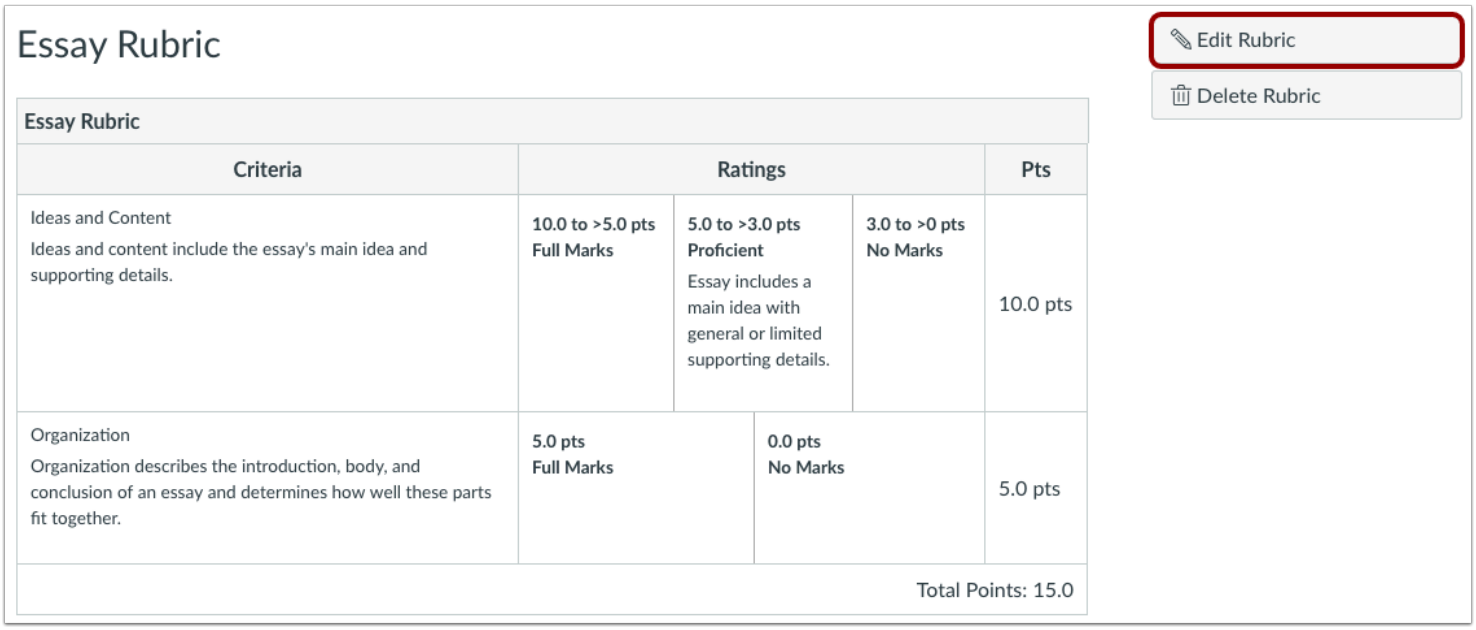
Click the name of a rubric.

Create Rubric



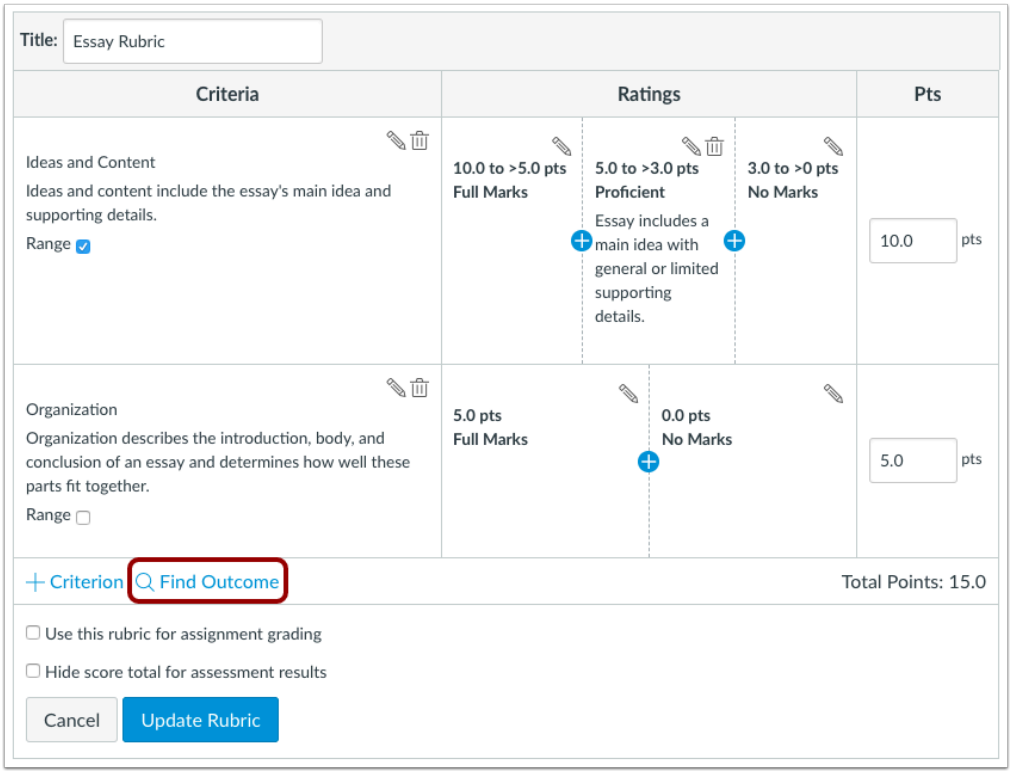
To create a new rubric, click the **Add Rubric** button.

Edit Rubric



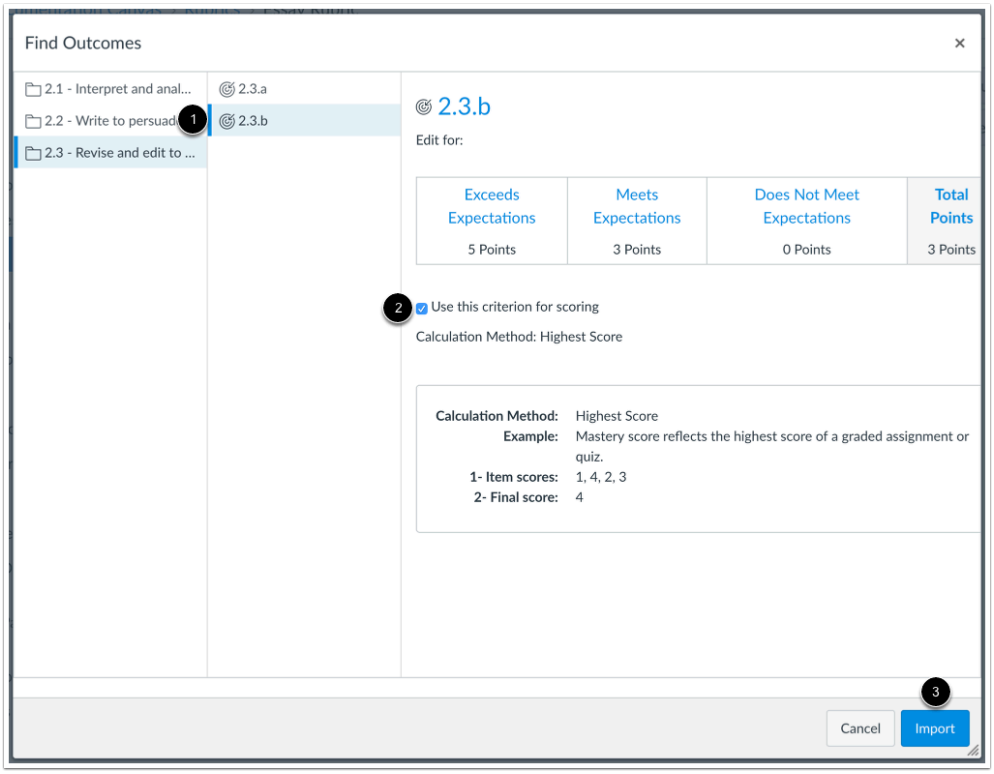
Click the **Edit Rubric** button.

Find Outcome



Click the **Find Outcome** link.

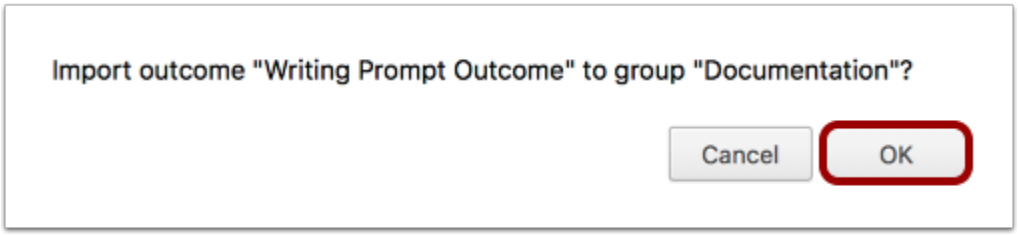
Import Outcome



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].

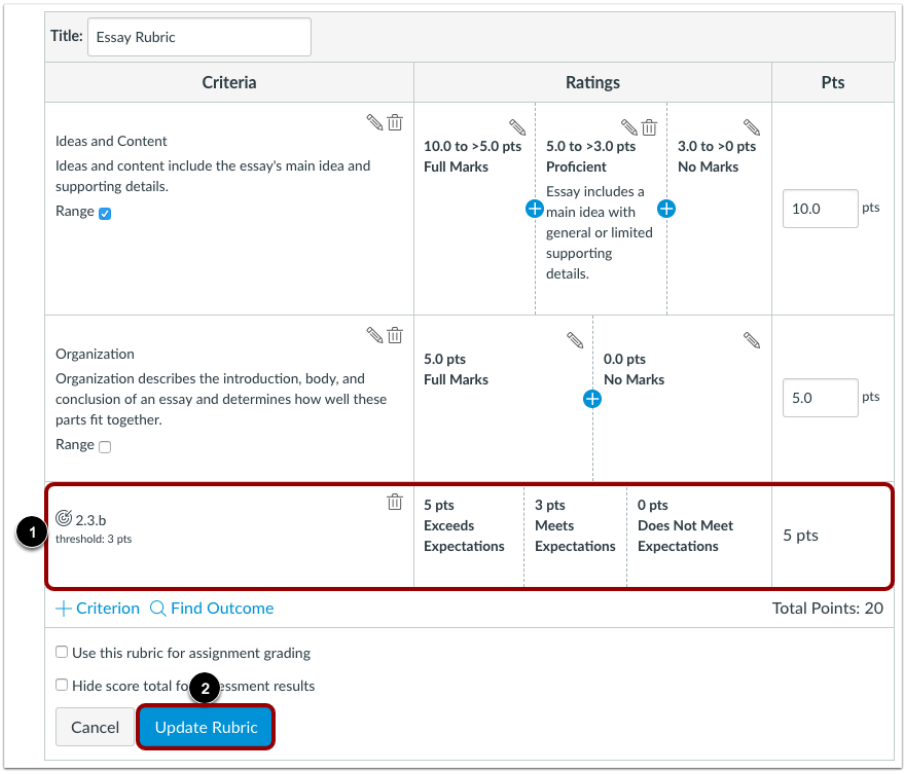
Note: Available outcomes may vary by institution.

Confirm Import



Click the **OK** button.

Update Rubric



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

How do I customize learning mastery ratings for an account?

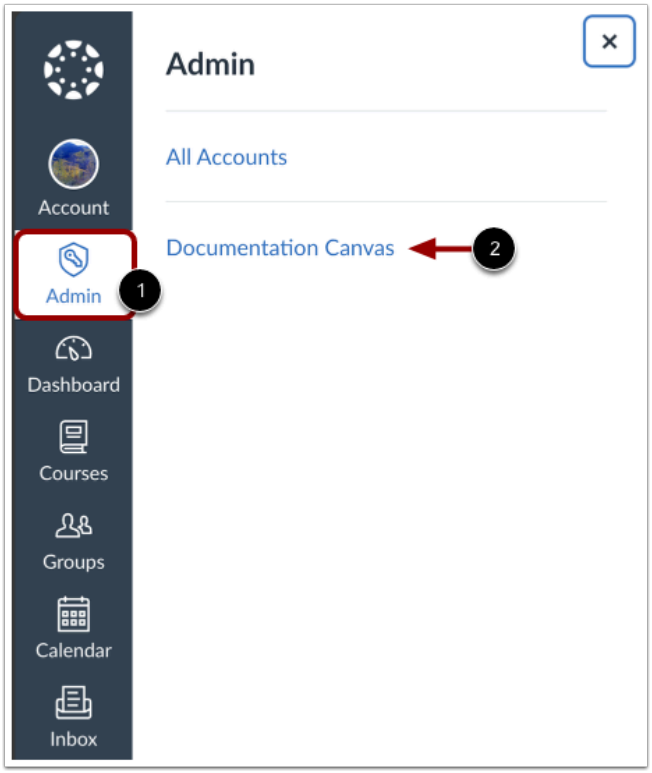
As an admin, you can customize the Learning Mastery ratings for the Learning Mastery Gradebook and Student Learning Mastery Gradebook. You can customize the set level for mastery, name and point value for proficiency ratings, and the color associated with each rating.

Assigned colors also display in rubric results within a student's Grades page. Even if students do not have access to the Student Learning Mastery Gradebook, the Grades page uses color to help students more easily recognize their own results within an assignment.

Customized Learning Mastery ratings apply to rubric criteria, not just outcomes criteria. When a rubric is used to assess a student, the selected criterion ratings match the point value or range in an outcomes proficiency rating and display the same color results. For instance, if the Exceeds Mastery proficiency rating is set to 5 points and indicated by the color green, a course rubric criterion with a rating of 5 points awarded to a student also displays the color green.

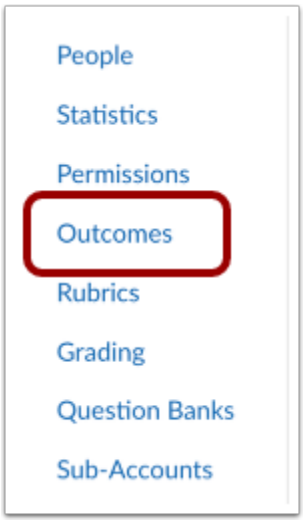
Note: You can allow instructors to manage outcome mastery scales for outcomes in their course.

Open Account



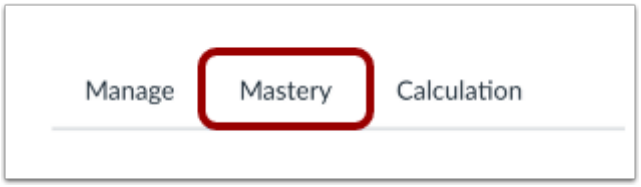
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Outcomes



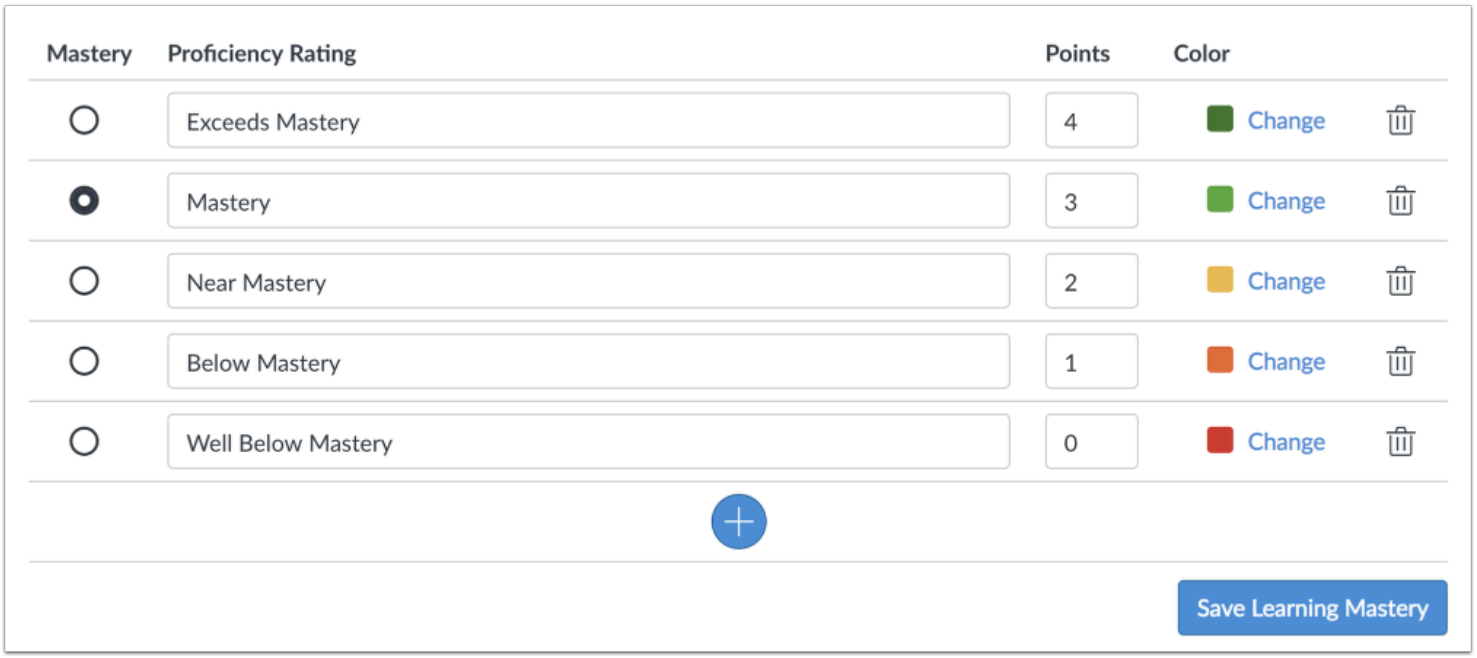
In Account Navigation, click the **Outcomes** link.

Open Mastery



Click the **Mastery** tab.

View Learning Mastery

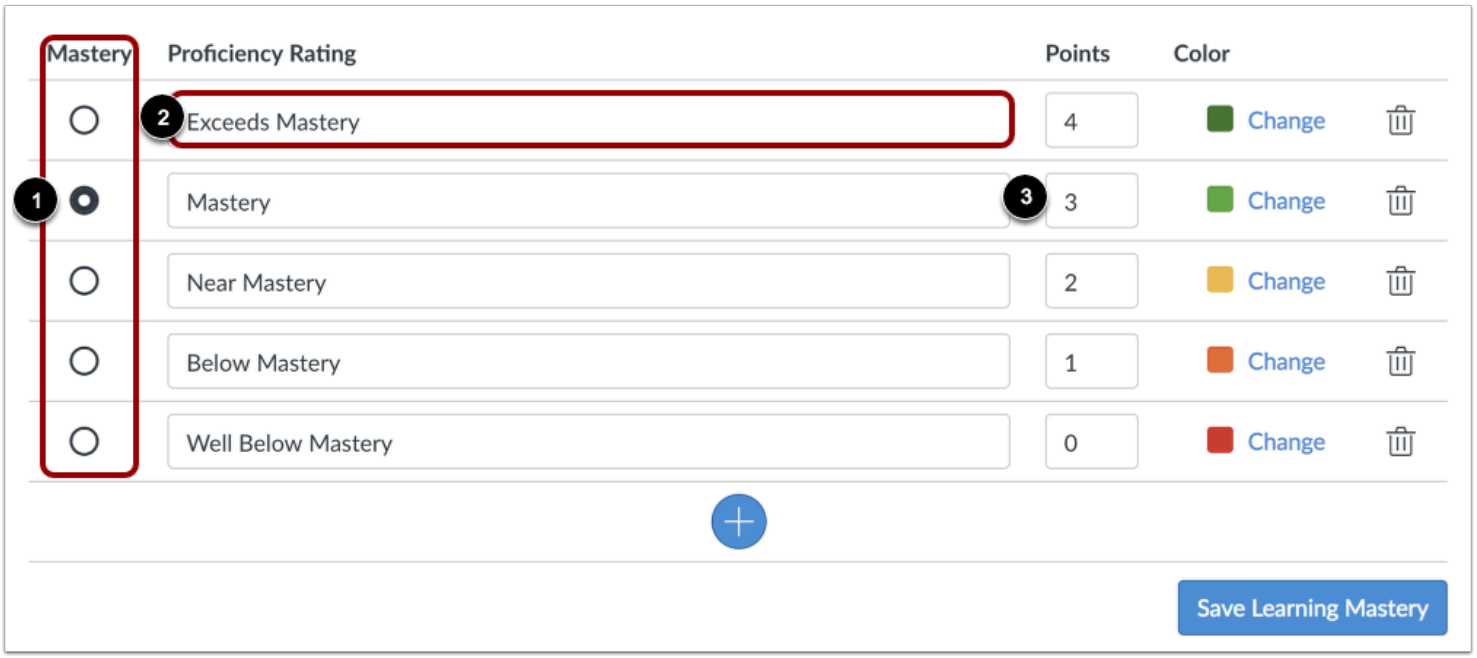


The Learning Mastery tab defaults to five rows, each with a learning mastery option (as noted from top to bottom):

- Proficiency Rating Identifiers: Exceeds Mastery, Mastery, Near Mastery, Below Mastery, Well Below Mastery
- Points: 4, 3, 2, 1, 0
- Colors: Dark green, light green, yellow, orange, red

Mastery is set in the second row.

Customize Learning Mastery

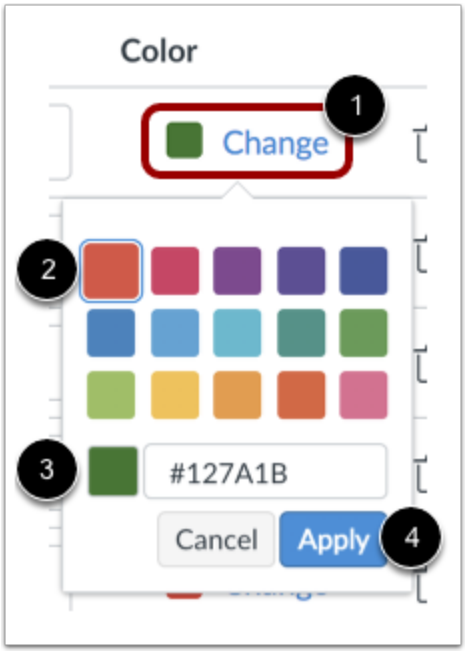


To set the mastery level, select the desired option in the **Mastery** column [1].

To change the name of a proficiency rating, select the rating name field and type the new name [2].

To change the point value associated with a proficiency rating, select the Points field and type the desire point value [3].

Customize Rating Color



Each mastery level is assigned a color that displays when viewing outcome scores in the **Learning Mastery Gradebook**. To change the color associated with a proficiency rating, locate the rating and click the **Change** link [1]. You can select a default color option [2] or enter a hex color code [3].

To save the selected color, click the **Apply** button [4].

Add Rating



To add a proficiency rating, click the **Add** button [1].

A new rating row displays at the bottom of the list with 0 points [2]. Customize the ratings as necessary.

You can add as many ratings as needed for your institution.

Delete Rating



To delete a proficiency rating, click the **Delete** icon.

Save Learning Mastery



To save your changes, click the **Save Learning Mastery** button.

Enhanced Rubrics

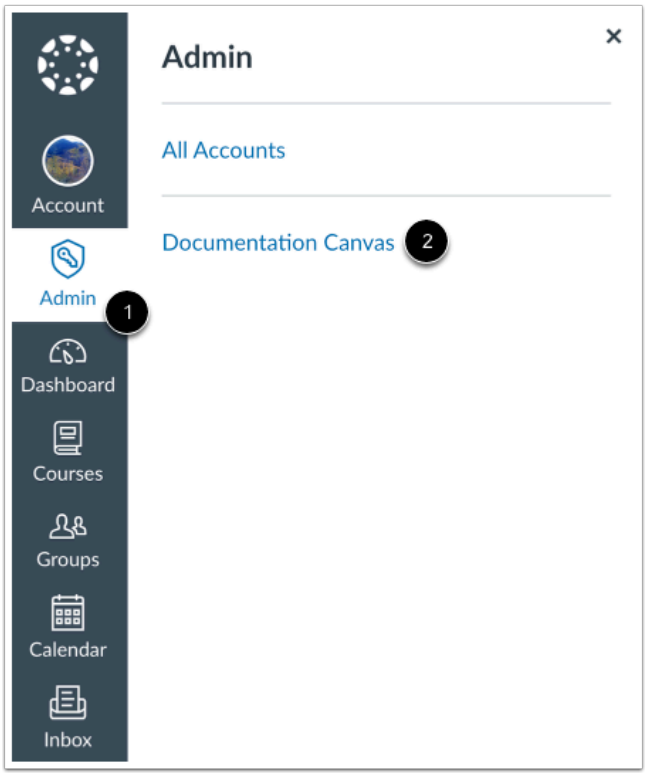
How do I manage rubrics in an account using Enhanced Rubrics?

You can create, edit, delete, archive, and duplicate 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.

Notes:

- The Assignment Enhancements feature option must be enabled for students to view the updated rubric interface.
- This lesson describes rubrics with Enhanced Rubrics feature option enabled. If the steps in this lesson do not match what is displayed in your account, visit our guide on how to manage rubrics in the Classic Rubrics interface.

Open Account



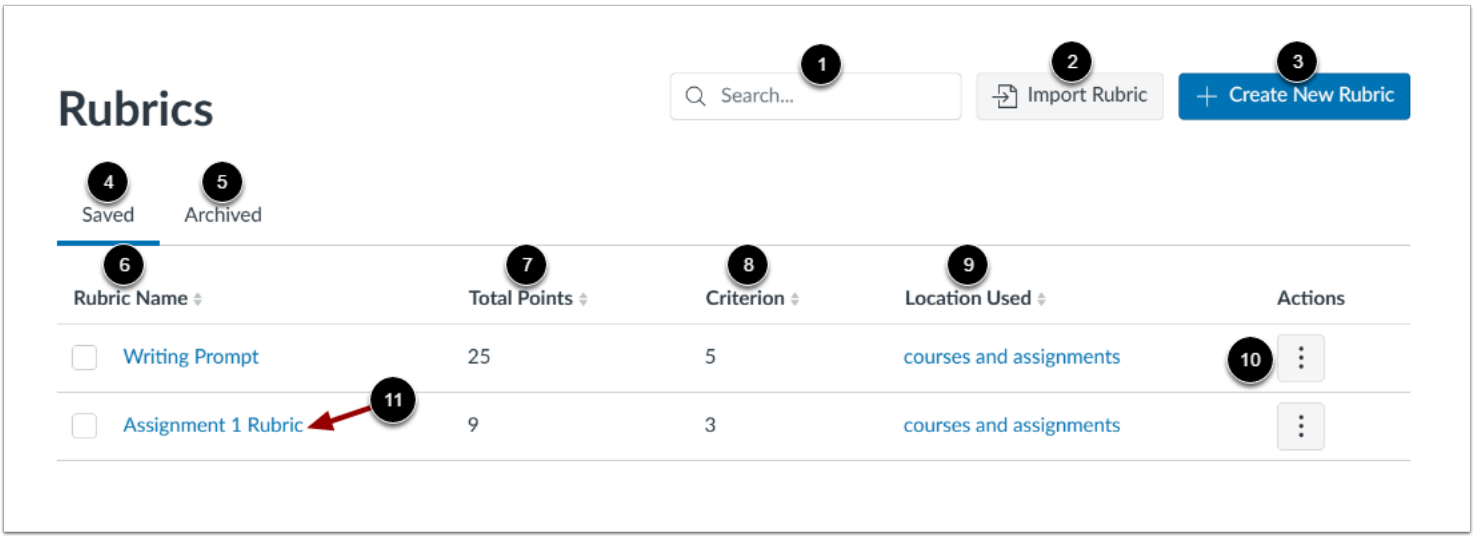
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Rubrics



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

View Rubric Page



In the Rubrics page, you can view all existing rubrics in the account.

To search for a rubric, enter the rubric name in the **Search** field [1].

To import a rubric, click the **Import Rubric** button [2].

To create a new rubric, click the **Create New Rubric** button [3].

To view saved rubrics, click the **Saved** tab [4].

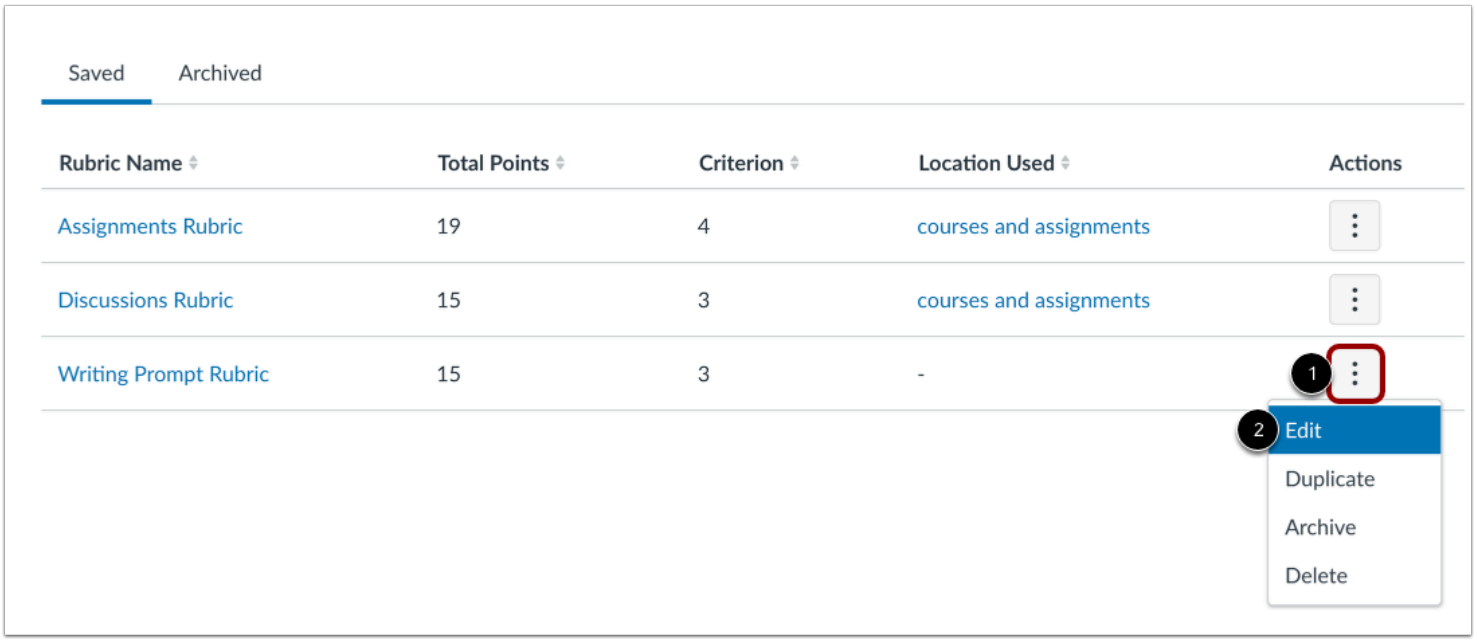
To view archived rubrics, click the **Archived** tab [5].

You can sort rubrics in ascending and descending order by **Rubric Name** [6], **Total Points** [7], **Criterion** [8], and **Location Used** [9].

You can manage a rubric by clicking the **Options** icon [10].

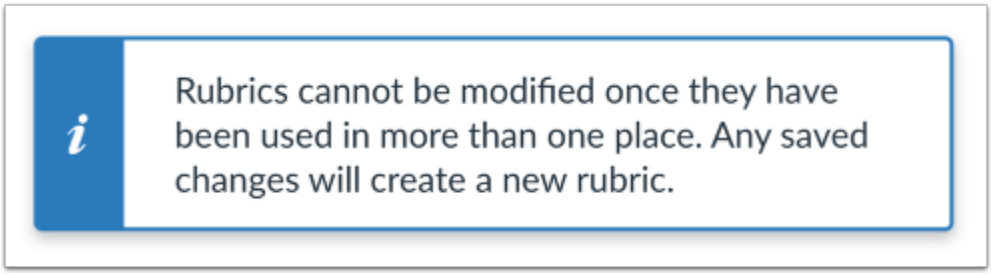
To open an existing rubric, click the rubric's name [11].

Edit Rubric



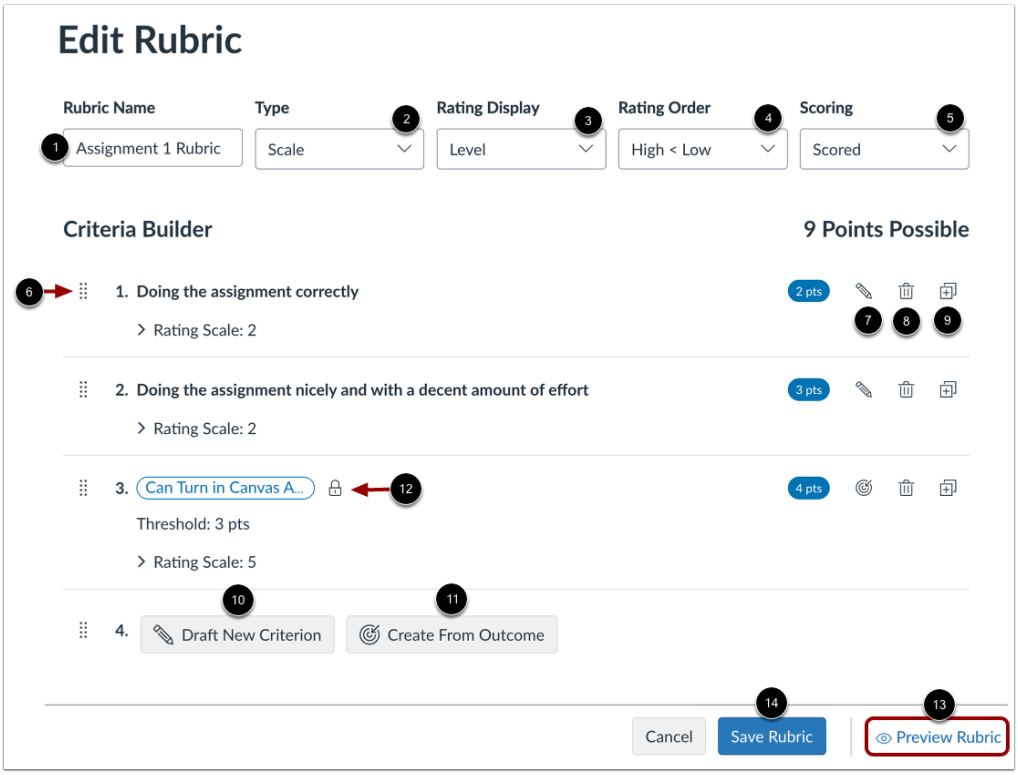
To edit the rubric, click the **Options** icon [1] and then click the **Edit** link [2].

View Uneditable Rubric



If a rubric has been used in more than one assignment, you cannot edit it. However, you can duplicate it to make change.

Edit Rubric Details



In the Edit Rubric page, you can do the following:

- Rename the rubric [1]
- Change the rubric type to Scale or Written Feedback [2]

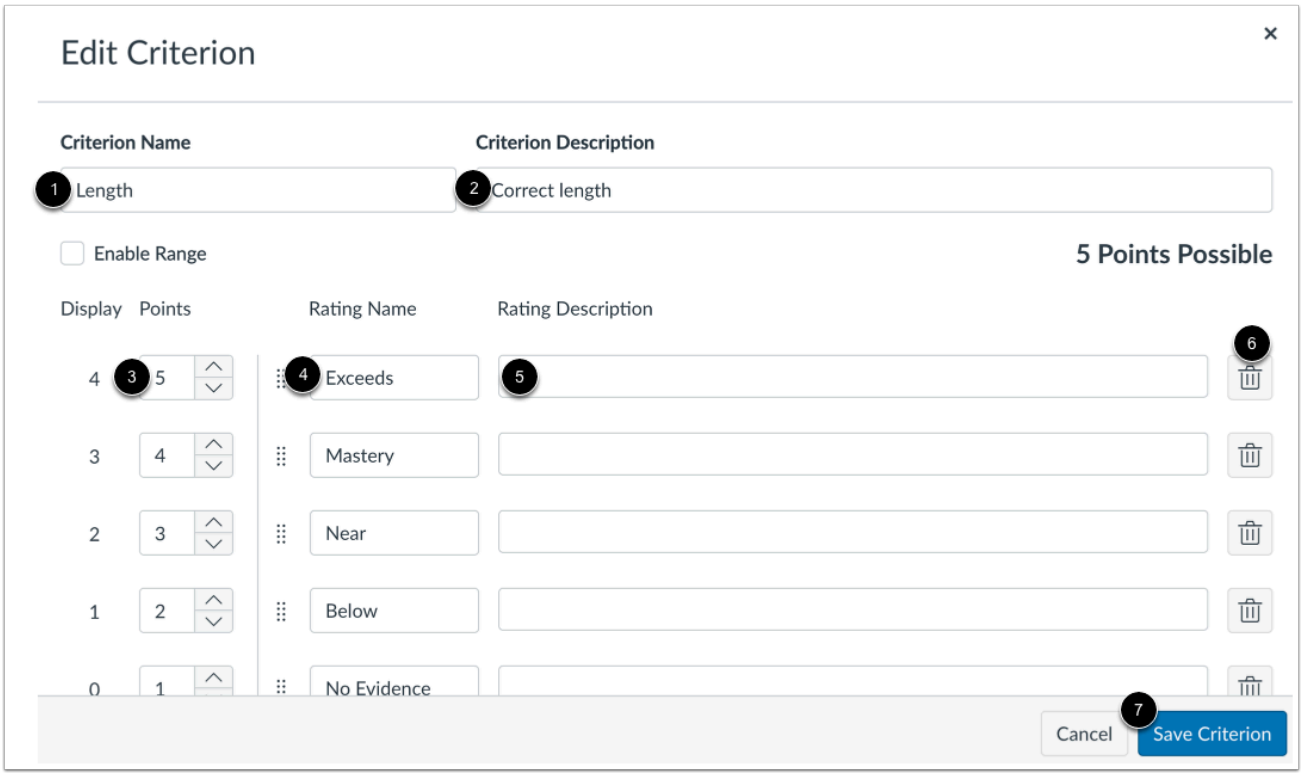
- Change the rating display to Level or Points [3]
- Change the rating order [4]
- Set the rubric as Scored or Unscored [5]
- Rearrange criterion ratings [6]
- Edit a rubric criterion description or long description [7]
- Delete a criterion or aligned outcome from the rubric [8]
- Duplicate a criterion from the rubric [9]
- Add a new criterion [10]
- Align an outcome [11]

If an outcome cannot be edited, a **Lock** icon displays [12].

To preview your edits, click the **Preview Rubric** link [13]

To apply the changes, click the **Save Rubric** button [14].

Edit Criterion Details



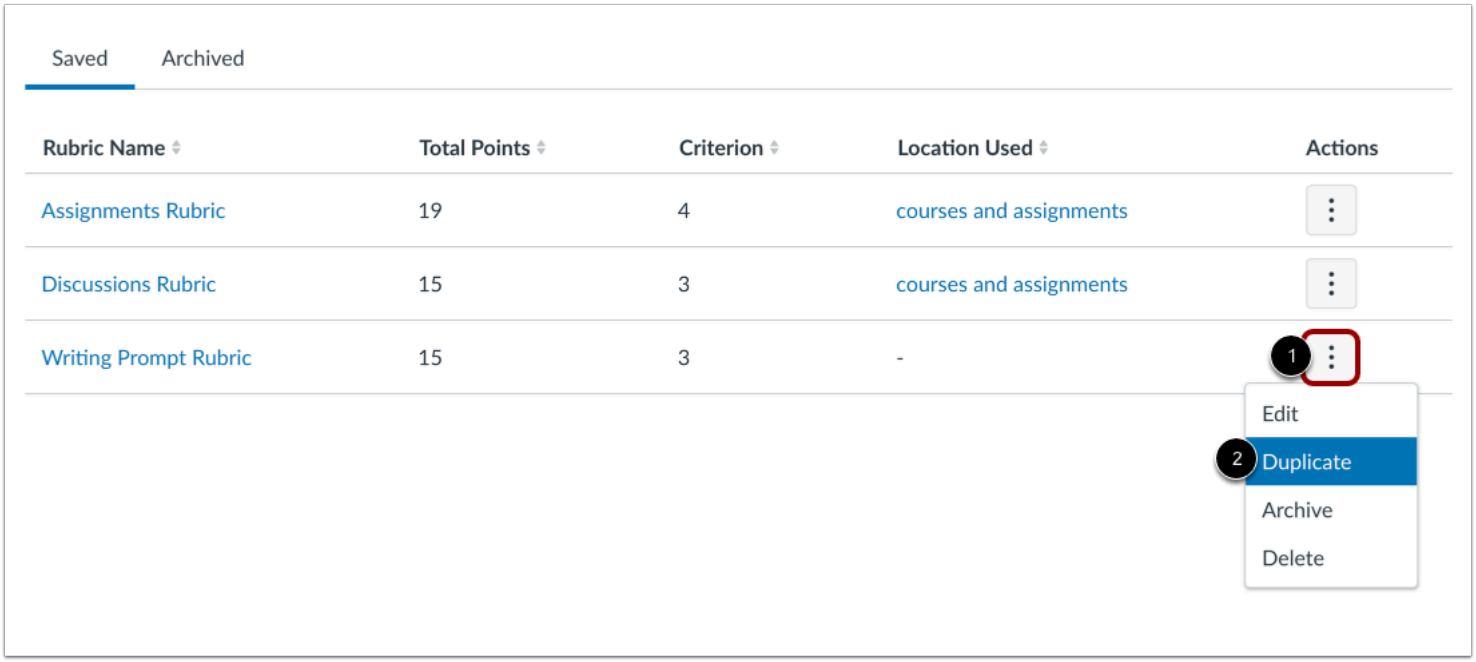
To rename a criterion, enter a new name in the **Criterion Name** field [1].

To edit a rubric criterion description or long description, enter updated details in the **Criterion Description** field [2]. You can also edit points [3], rating name [4], and rating description [5].

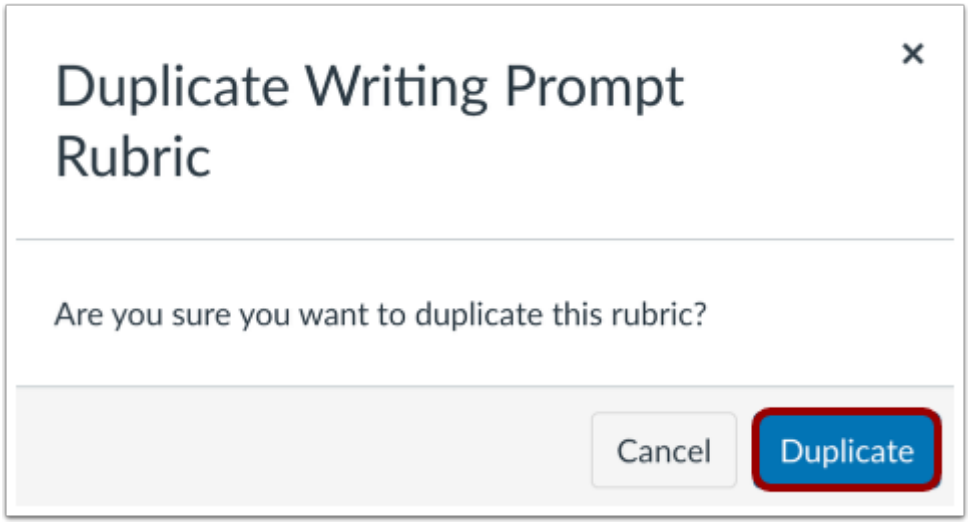
To delete a criterion from the rubric, click the criterion **Delete** icon [6].

To save your edits, click the **Save Criterion** button [7].

Duplicate Rubric

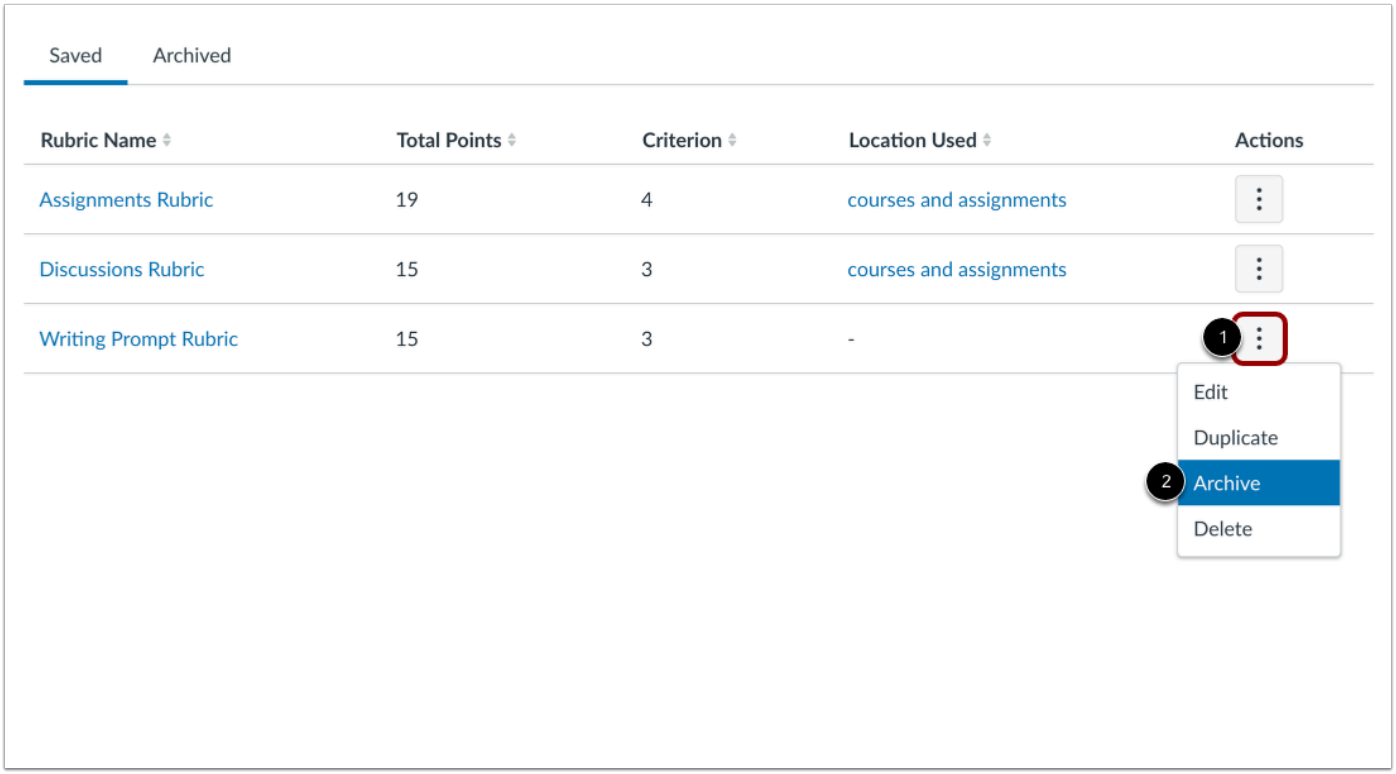


To duplicate a rubric, click **Options** icon [1] and then click the **Duplicate** link [2].



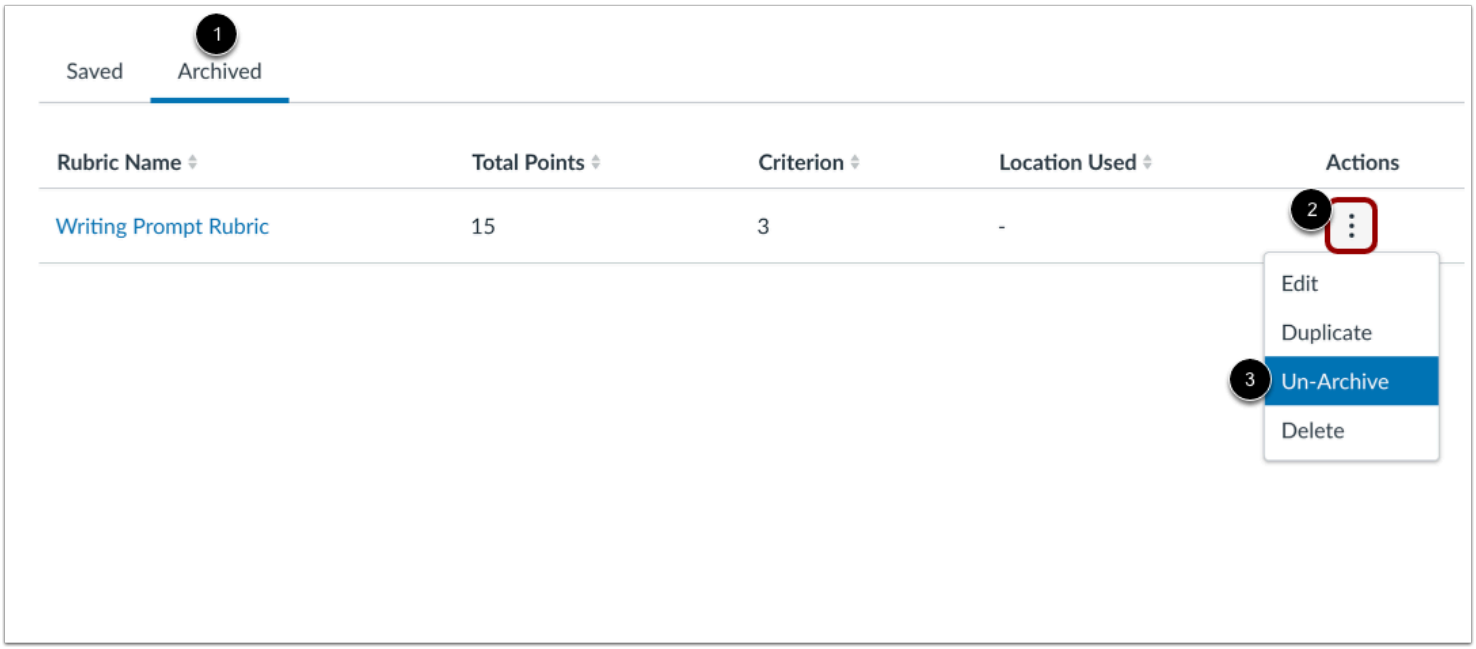
Click the **Duplicate** button.

Archive Rubric



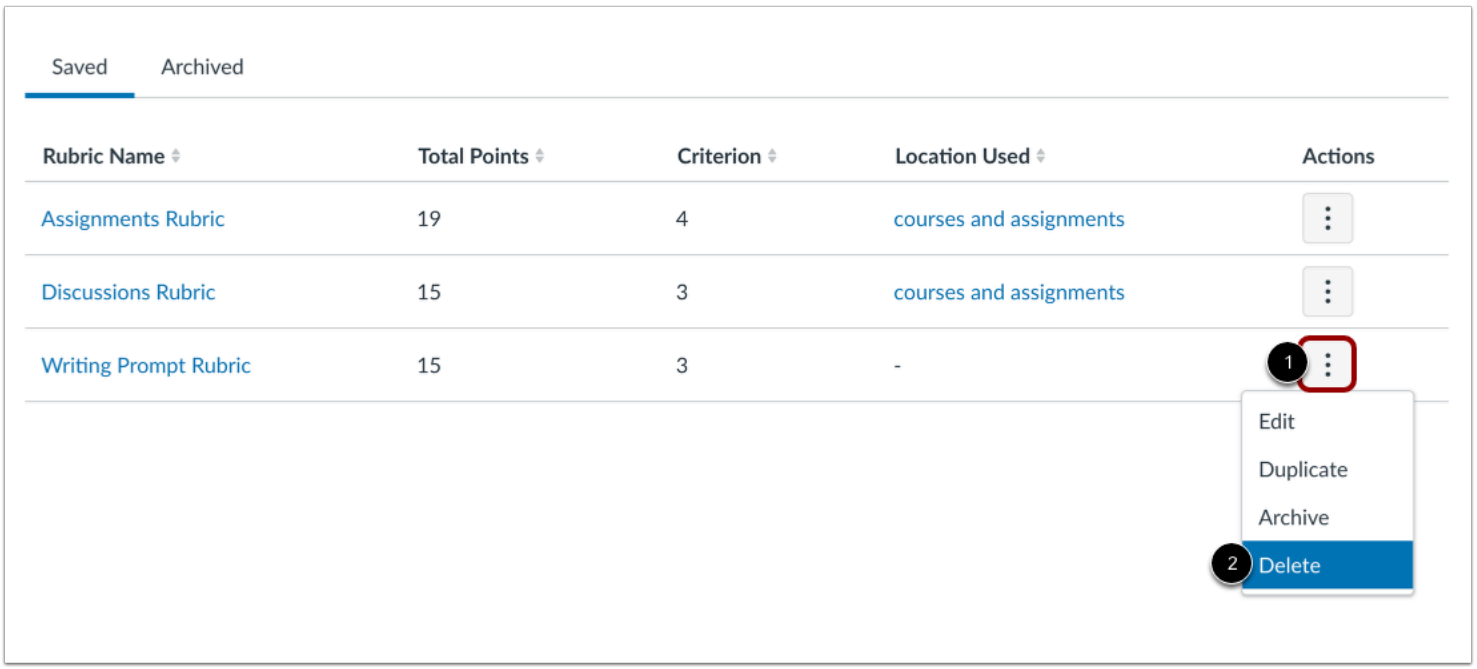
To duplicate a rubric, click **Options** icon [1] and then click the **Archive** link [2].

Unarchive Rubric



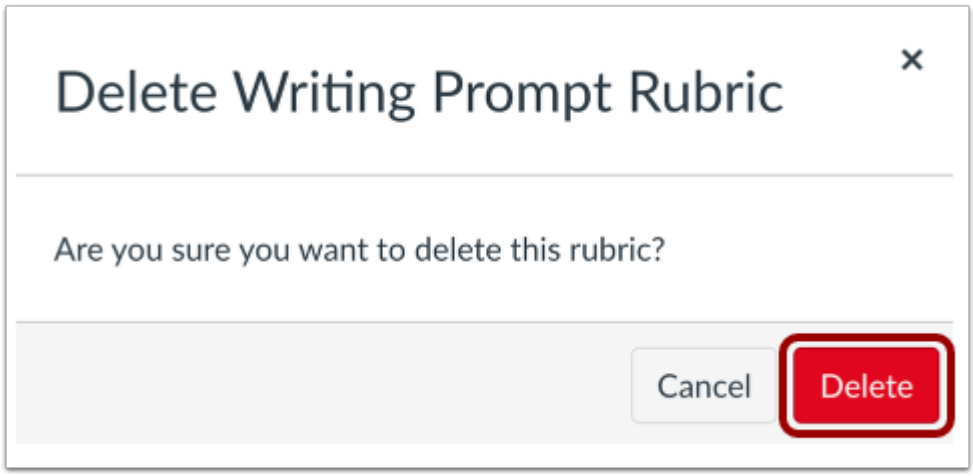
In the Rubrics page, click the **Archived** tab [1]. To unarchive a rubric, click the **Options** icon [2] and then click the **Un-Archive** link [3].

Delete Rubric



If you created a rubric in your course, you can delete the rubric. To delete a rubric, click **Options** icon [1] and then click the **Delete** link [2].

A rubric cannot be deleted if it is associated with an assignment or set as the default for an account or course. However, it can be archived or unlinked from individual assignments.



Click the **Delete** button.

When you delete a rubric, Canvas will remove the rubric from the assignment and the course.

How do I add a rubric in an account using Enhanced Rubrics?

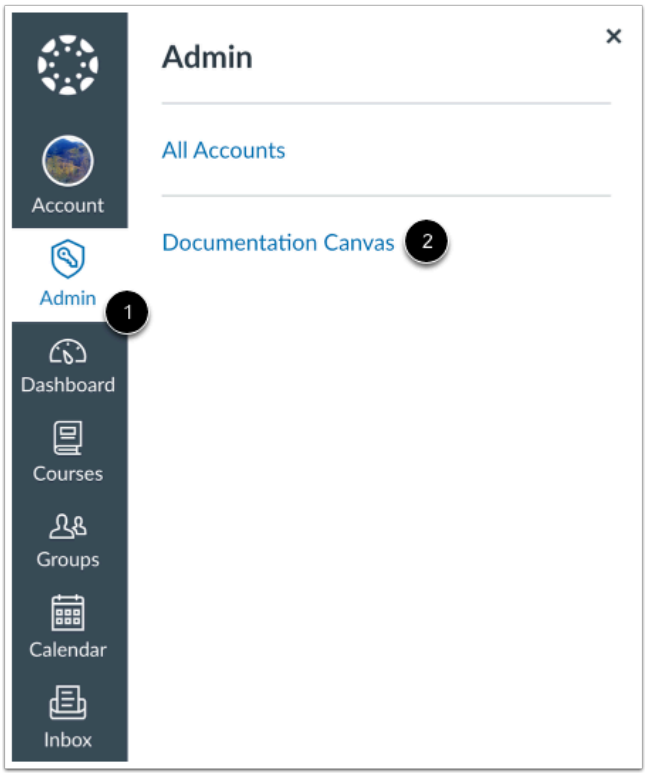
You can create rubrics for instructors to use across your institution. Instructors can add account-level rubrics to their assignments, graded discussions, and quizzes. Instructors can also create their own rubrics in their courses.

Rubric criteria can include a point range or an individual point value. Rubrics can also be set as non-scoring rubrics, which allows for the use of rubrics without point values.

Notes:

- The Assignment Enhancements feature option must be enabled for students to view the updated rubric interface.
- This lesson describes rubrics with Enhanced Rubrics feature option enabled. If the steps in this lesson do not match what is displayed in your account, learn how to add a rubric in the Classic Rubric interface.

Open Account



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

Open Rubrics



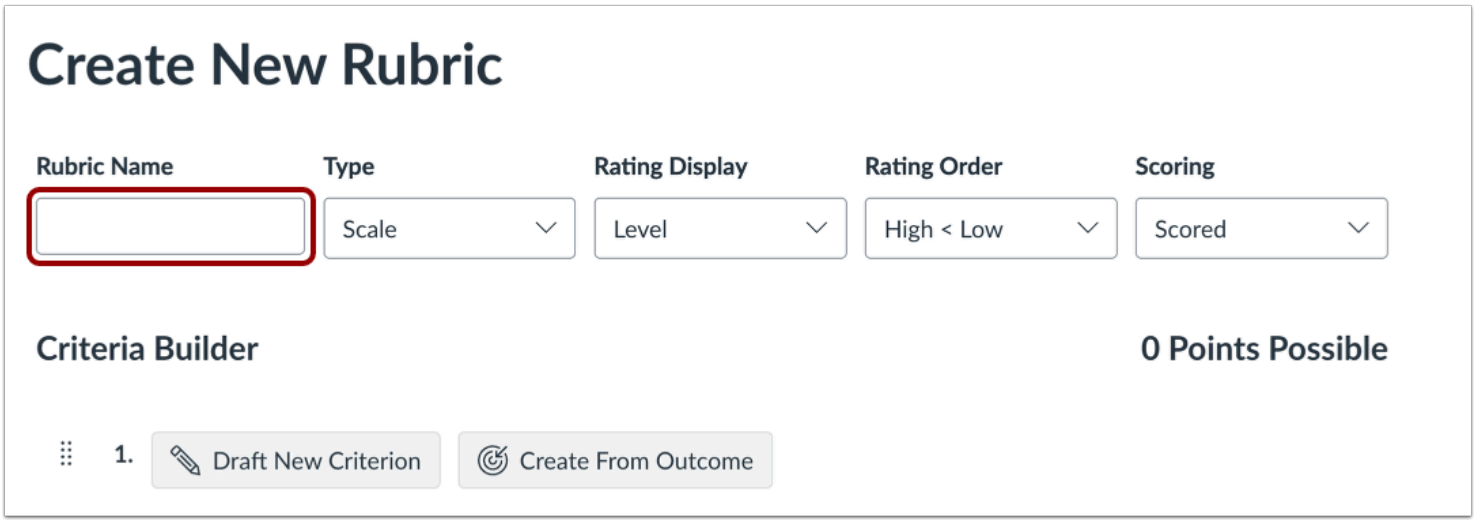
In Account Navigation, click the **Rubrics** link.

Create New Rubric



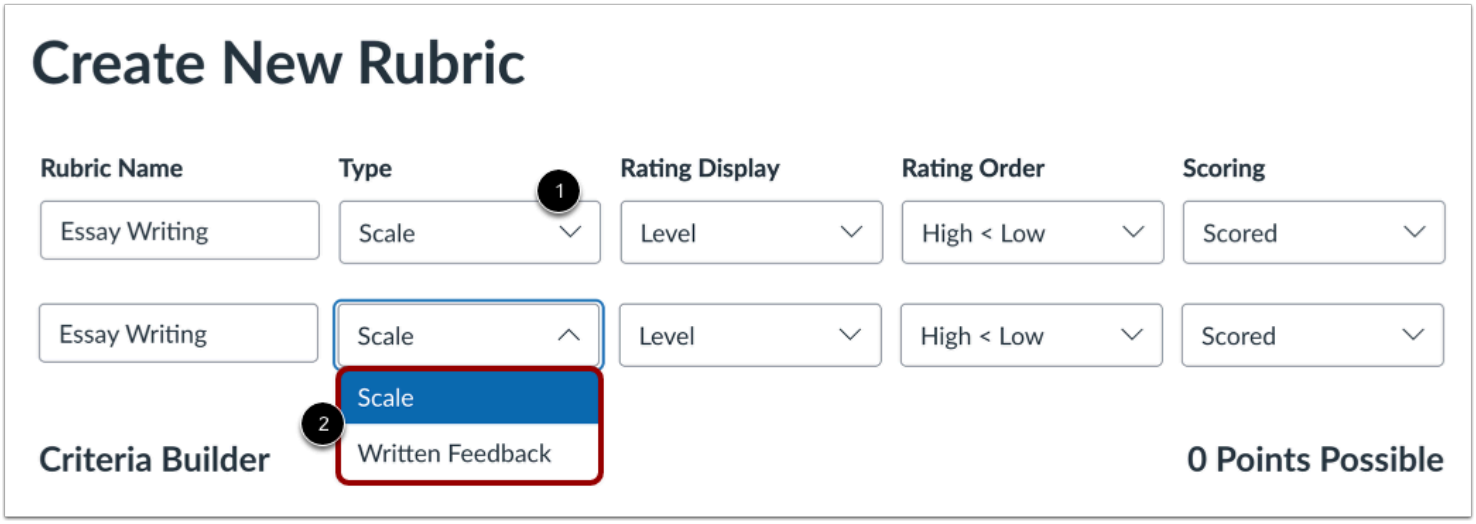
Click the **Create New Rubric** button.

Enter Name



In the **Rubric Name** field, enter a name for the rubric. This name helps instructors identify the rubric so they can associate it with an assignment, graded discussion, or quiz.

Select Type



To select the rubric type, click the **Type** drop-down menu [1]. Then, select **Scale** or **Written Feedback** [2].

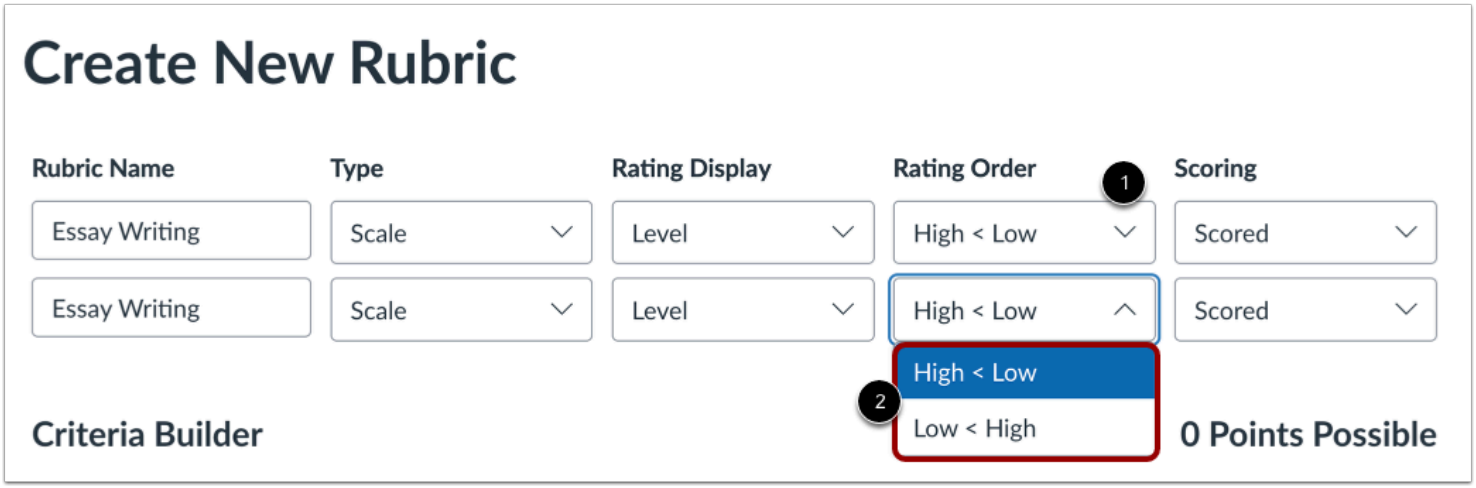
Note: If you select Written Feedback, you cannot edit the default points or enable a point range.

Select Rating Display



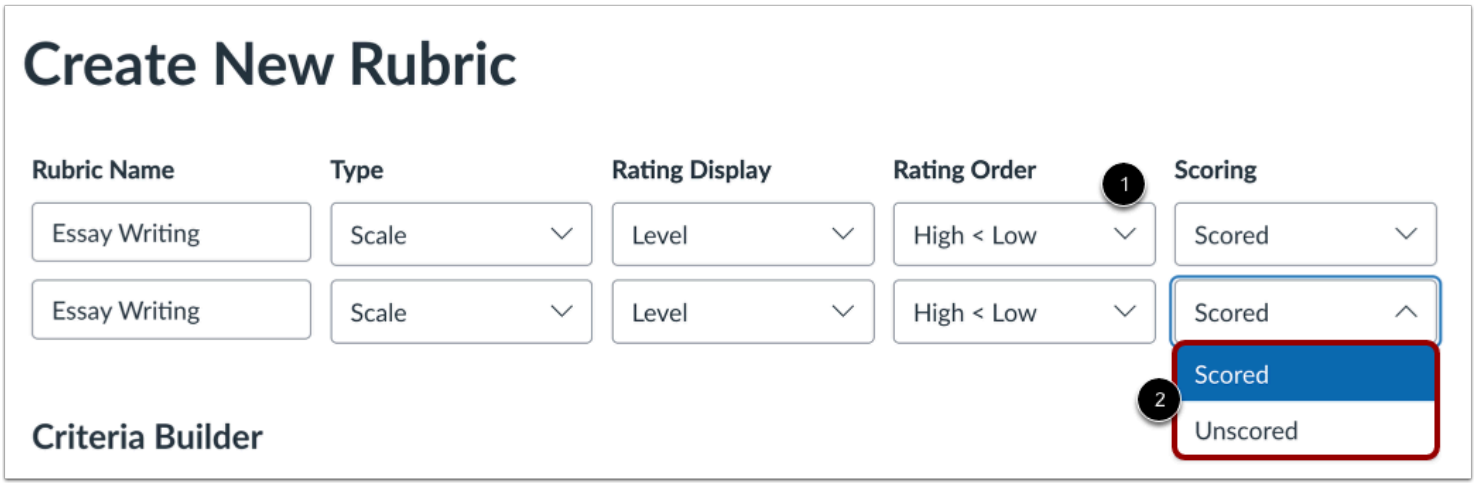
You can choose to display the actual point value for each rating instead of, or alongside, the default numeric labels. In the **Rating Display** drop-down menu [1], select either the **Level** or **Points** option [2].

Select Rating Order



In the **Rating Order** drop-down menu [1], you can set the order to **High to Low** or **Low to High** [2].

Select Scoring



In the **Scoring** drop-down menu [1], you can set the rubric as **Scored** or **Unscored** [2].

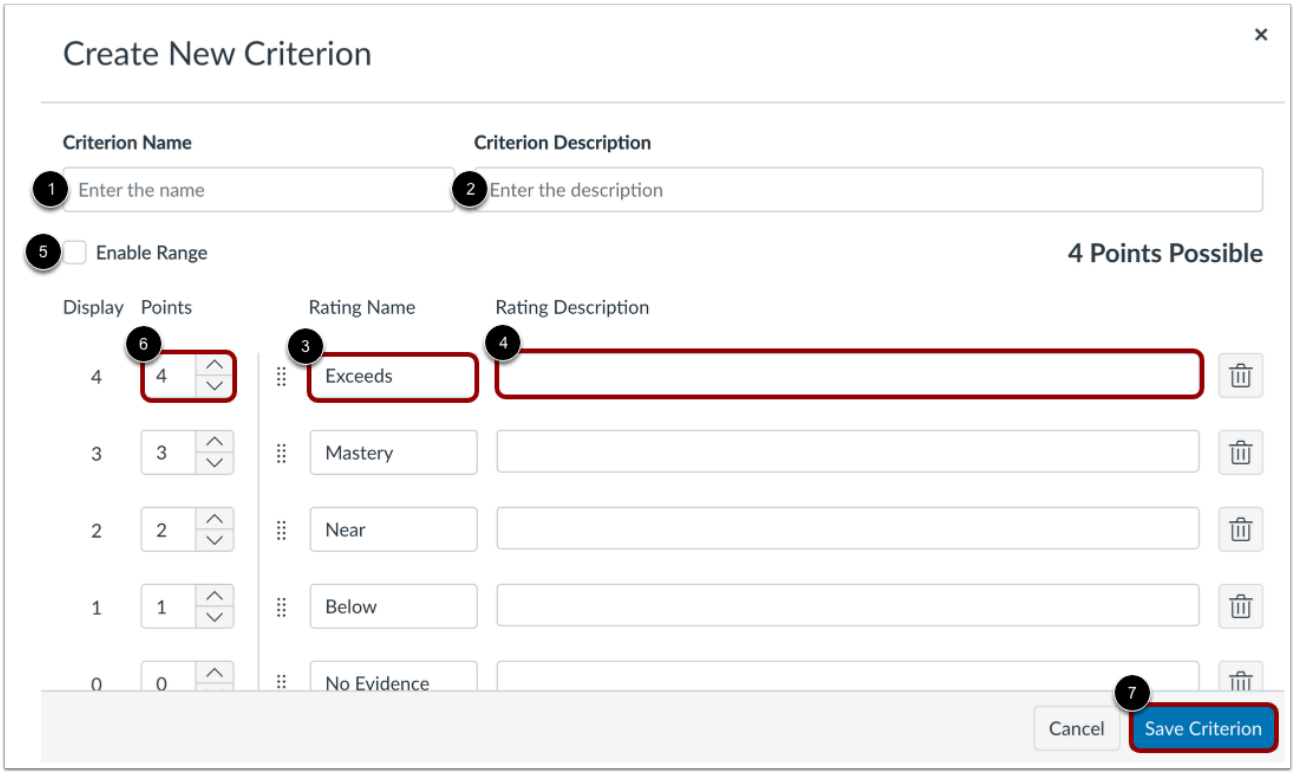
Draft New Criterion



The rubric includes one default criterion entry. To draft a new criterion, click the **Draft New Criterion** button [1].

You can also create the criterion from an outcome [2].

Enter Descriptions



Enter a name for the criterion in the **Criterion Name** field [1].

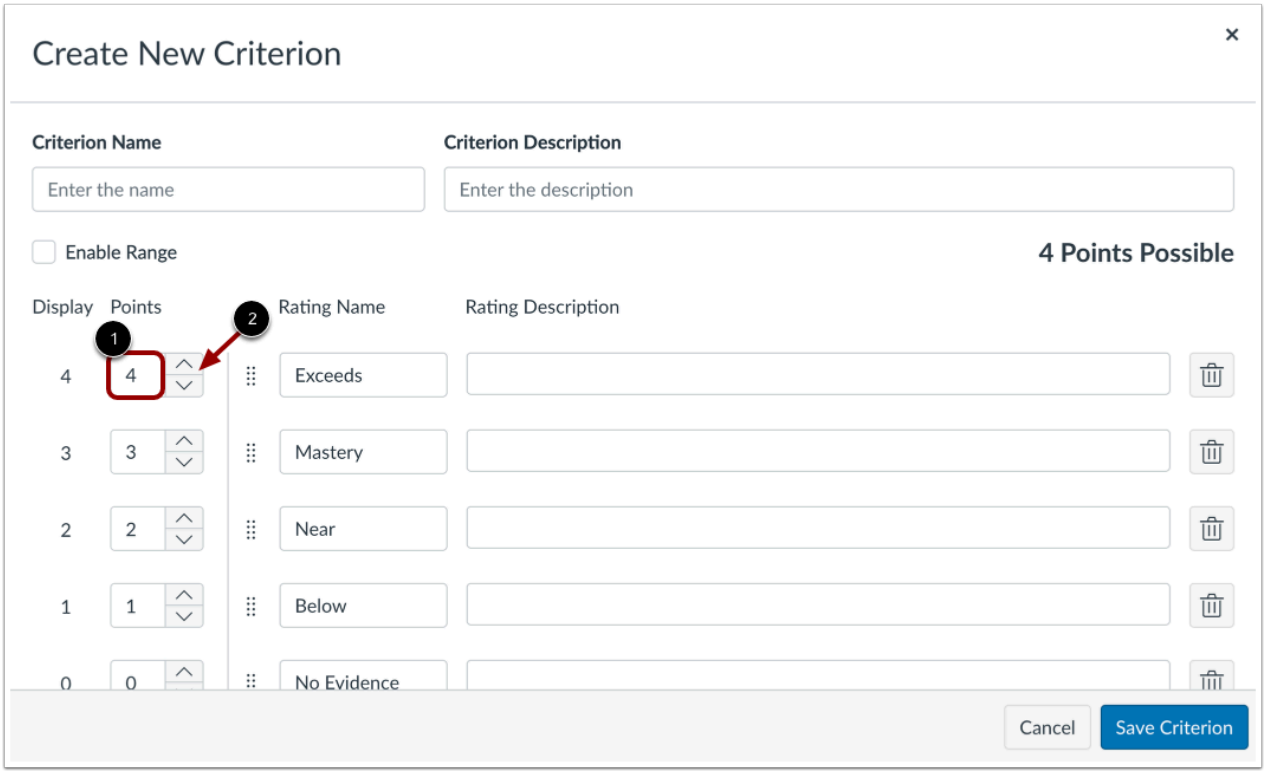
You can add a longer description in the **Criterion Description** field [2]. The longer description provides students with more information about the criterion.

You can also update the **Rating Name** [3] or add a **Rating Description** [4].

If you selected the Scale rubric type, you can enable a point range [5] or change the default points [6].

Click the **Save Criterion** button [7].

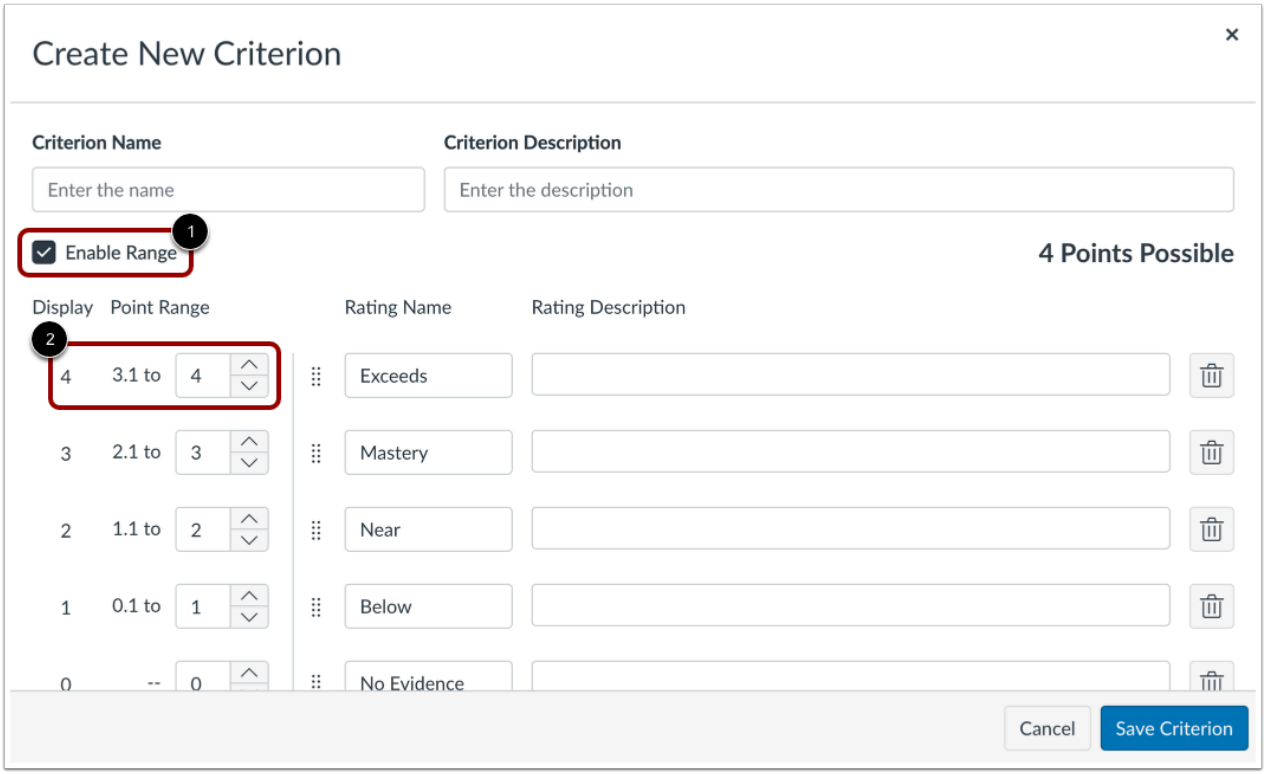
Edit Total Point Value



Rubric ratings default to 4 points, awarding 4 points for full rubric marks and 0 points for no rubric marks.

If you want to adjust the total point value of the criterion, enter the number of points in the **Points** field [1] or use the up or down arrows to change the total point value [2].

Select Range

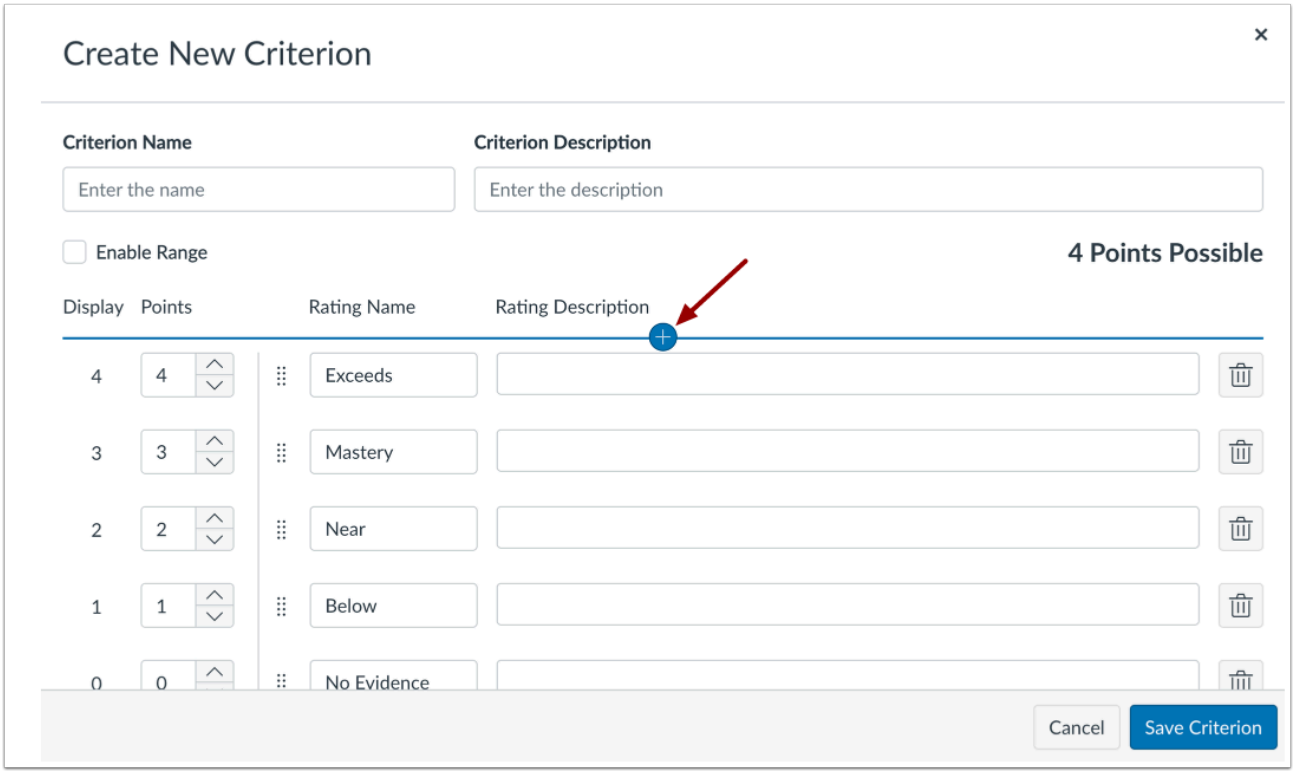


By default, rubric ratings use individual point values. To use point ranges instead, select the **Enable Range** checkbox [1]. Ranges let you assign a rating across multiple point values instead of a single value.

When enabled, the first rating (full marks) displays the total point value as a range [2]. Each rating shows both a maximum and minimum point value. The maximum value in each range is used as the rating's point value.

Aside from displaying a range, criteria using point ranges function the same as those with individual point values. For example, a rating with a range of 3 to 5 points assigns the full value of 5 points.

Add Ratings



To add a new rating for the criterion, hover your mouse between the current ratings and click the **Add Rating** icon.

Update Rating

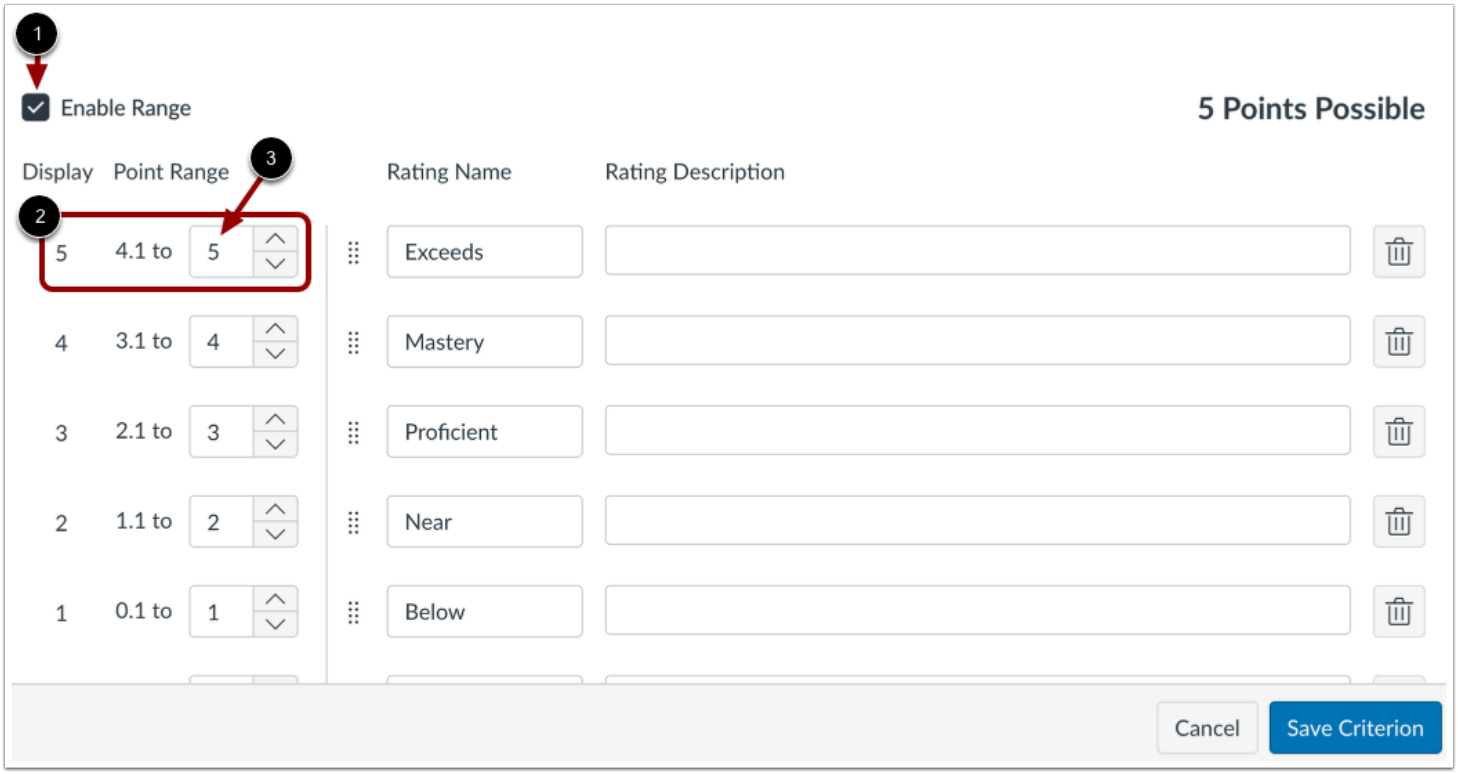


By default, the new rating points field displays the point value between the two existing ranges [1]. To change the point value for the rating score, enter the new point value in the **Points** field [2]. Points can be whole (1, 5, 10) or decimal (0.3, 0.5, 2.75) numbers.

Enter a name for the rating in the **Rating Nam**e field [3].

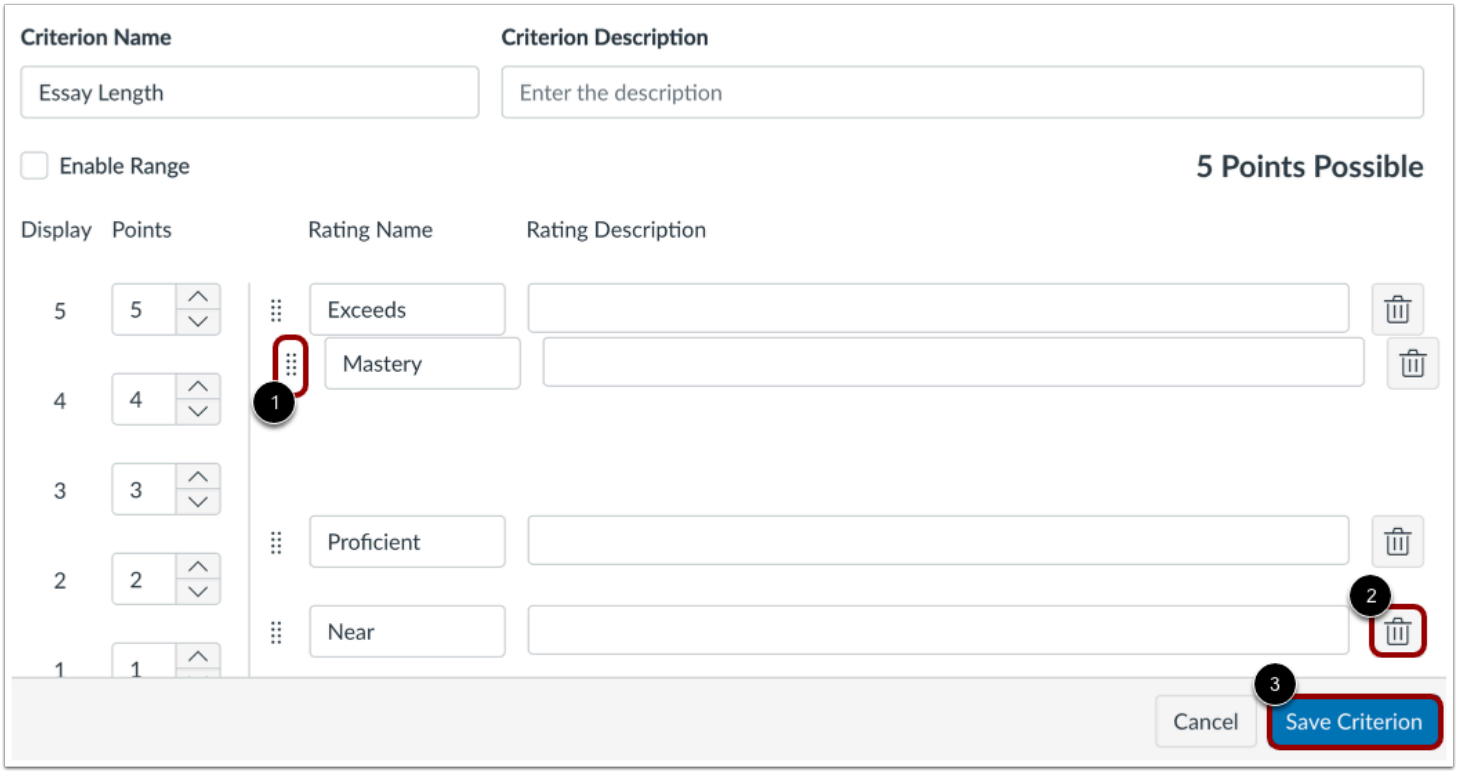
Enter a description for the rating in the **Rating Description** field [4].

Update Range Rating



When ranges are enabled [1], the Point Range field displays the point value between the two existing ranges [2]. To change the point value for the rating score, enter the new point value in the **Point Range** fields [3].

Reorder Ratings

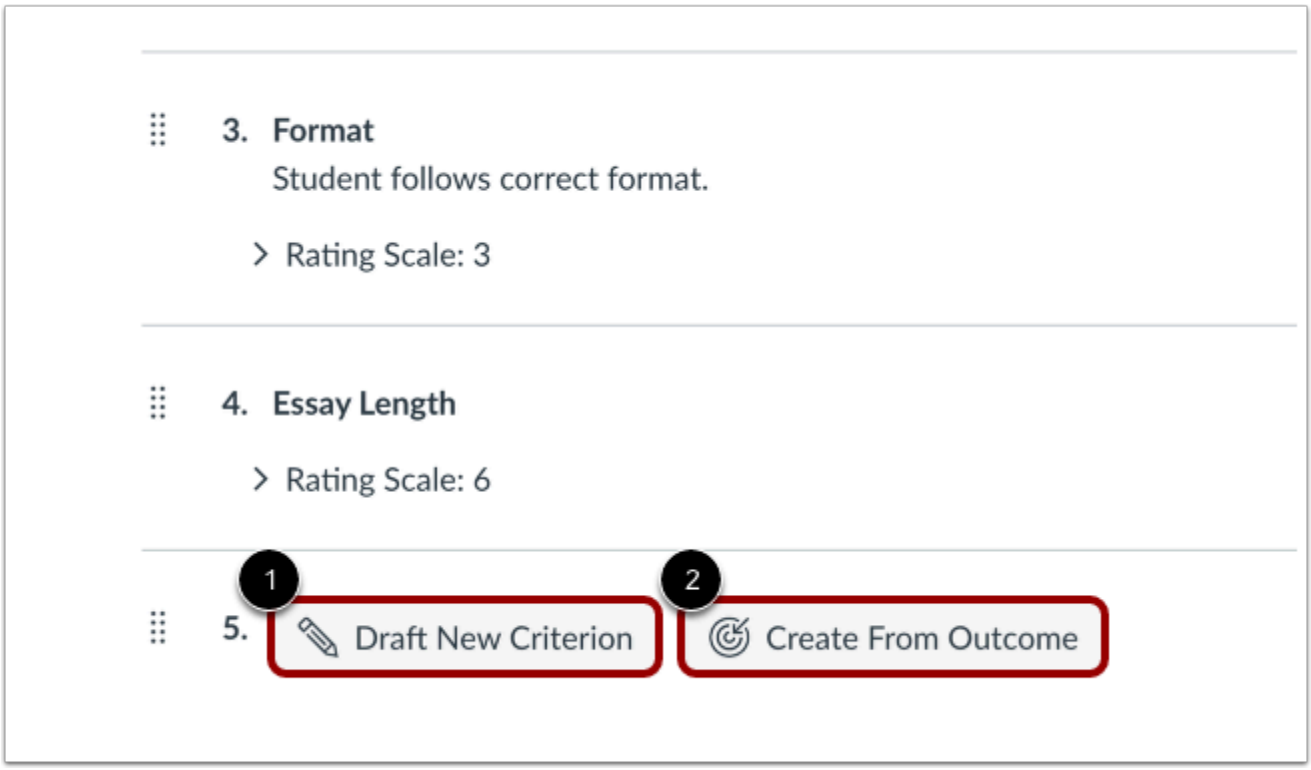


You can use the drag and drop option to reorder rubric ratings. Click the **Move** icon [1]. Drag and drop the rubric rating into the desired location.

To delete a criterion, click the **Delete** icon [2].

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

Add Criterion



To add another criterion, click the **Draft New Criterion** button [1].

To create a rubric from an outcome, click the **Create From Outcome** button [2].

Note: Outcomes cannot be edited directly in a rubric.

Save Rubric

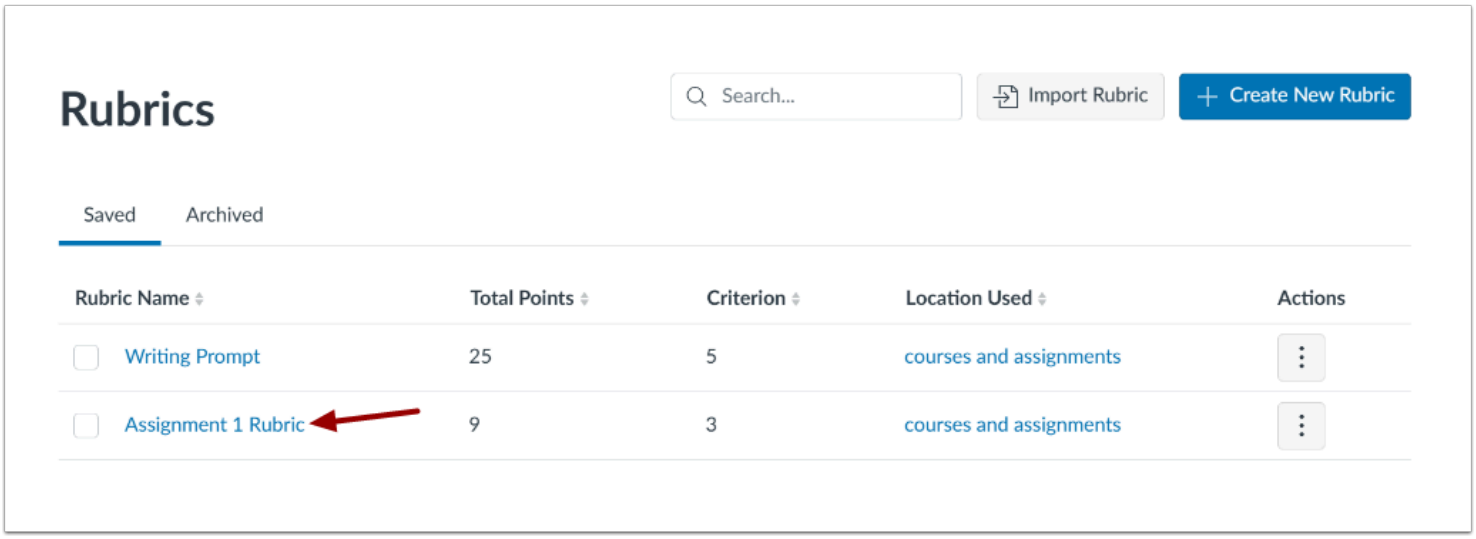


To preview the rubric, click the **Preview Rubric** link [1].

To save and publish the rubric, click the **Save Rubric** button [2].

To save the rubric as a draft, click the **Save as Draft** button [3].

View Rubric



View the rubric on the Rubrics page.

Manage Rubric



To edit, duplicate, copy, archive, or delete a rubric, click the **Options** link.

How do I align an outcome with a rubric in an account using Enhanced Rubrics?

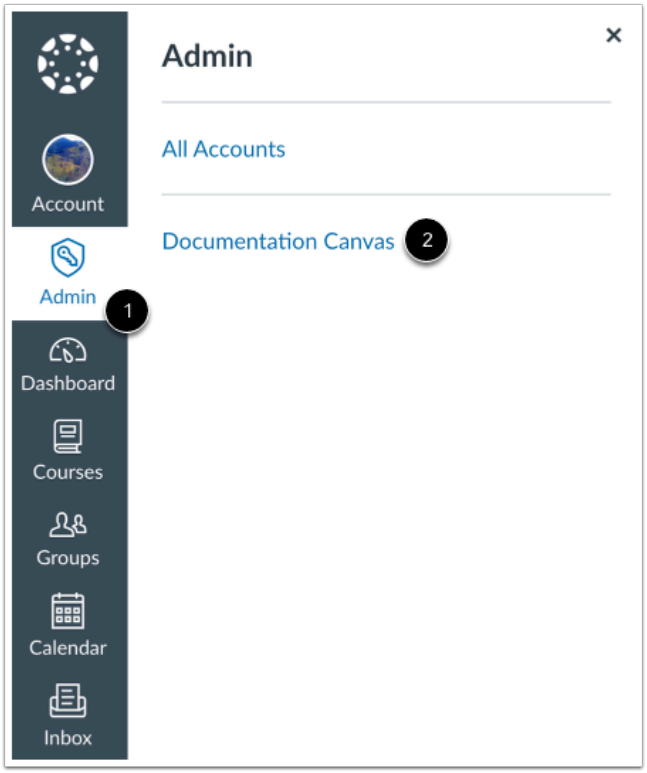
You can align any outcome in your account with a rubric. Rubrics help students understand assignment expectations and how their submissions will be graded. Outcomes can be aligned with a rubric for additional assessment and measurable performance.

To align an outcome, it must already exist in your account. You can also create account outcomes first.

Notes:

- You can add outcomes to rubrics, but you cannot add rubrics to outcomes.
- You cannot edit a rubric after it has been added to more than one assignment in a course.
- The Assignment Enhancements feature option must be enabled for students to view the updated rubric interface.
- This lesson describes rubrics with Enhanced Rubrics feature option enabled. If the steps in this lesson do not match what is displayed in your account, refer to our guide on aligning an outcome with a rubric in the Classic Rubrics interface.

Open Account



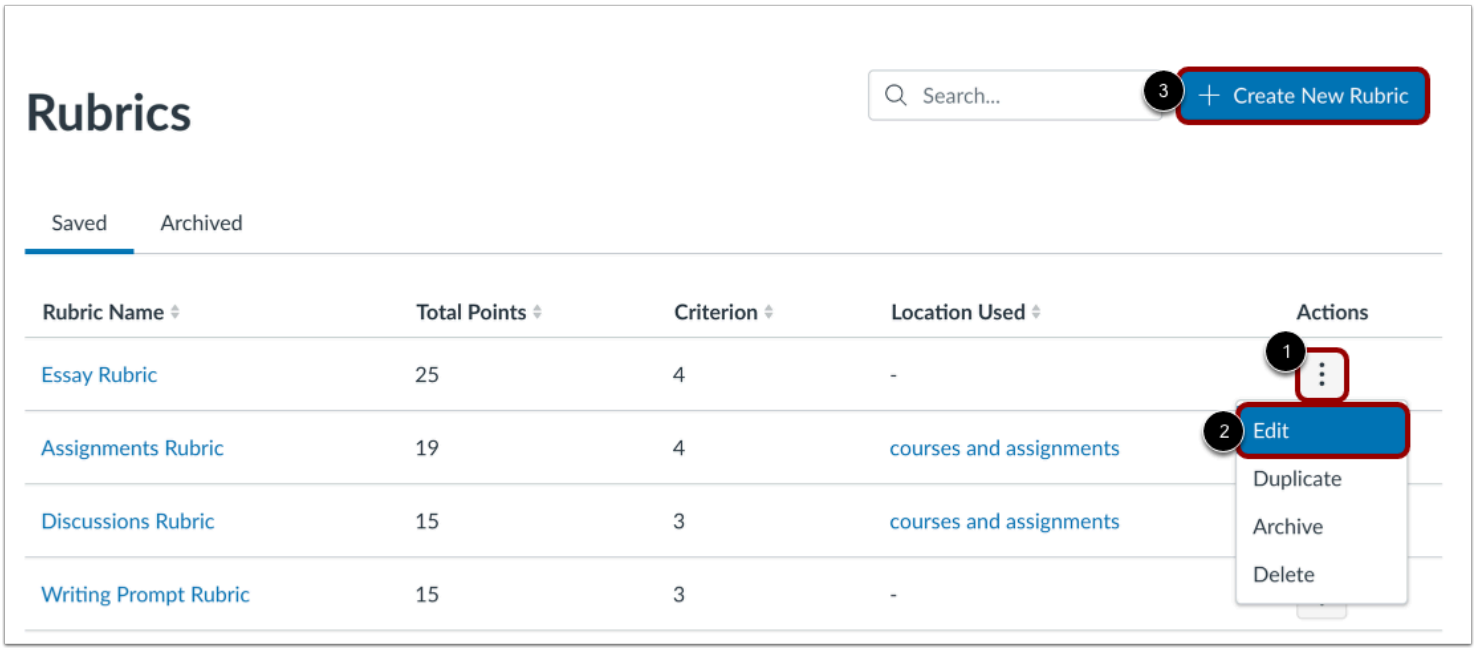
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Rubrics



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

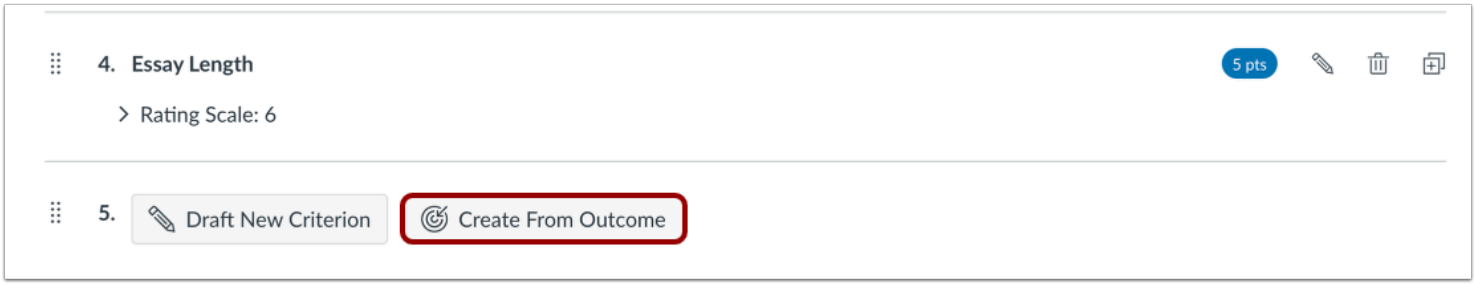
Open Rubric



To align an outcome with an existing rubric, click the **Options** icon [1] and then click the **Edit** link [2].

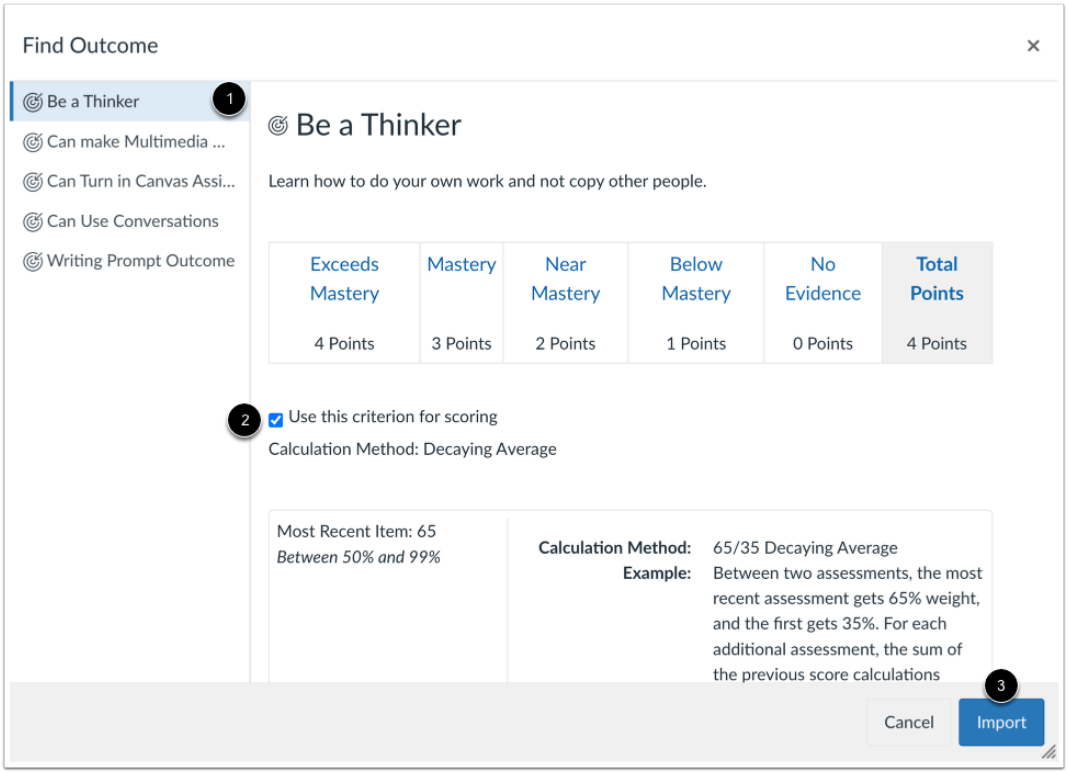
To create a new rubric to align an outcome with, click the **Create New Rubric** button [3].

Create Criterion From Outcome



Click the **Create From Outcome** button.

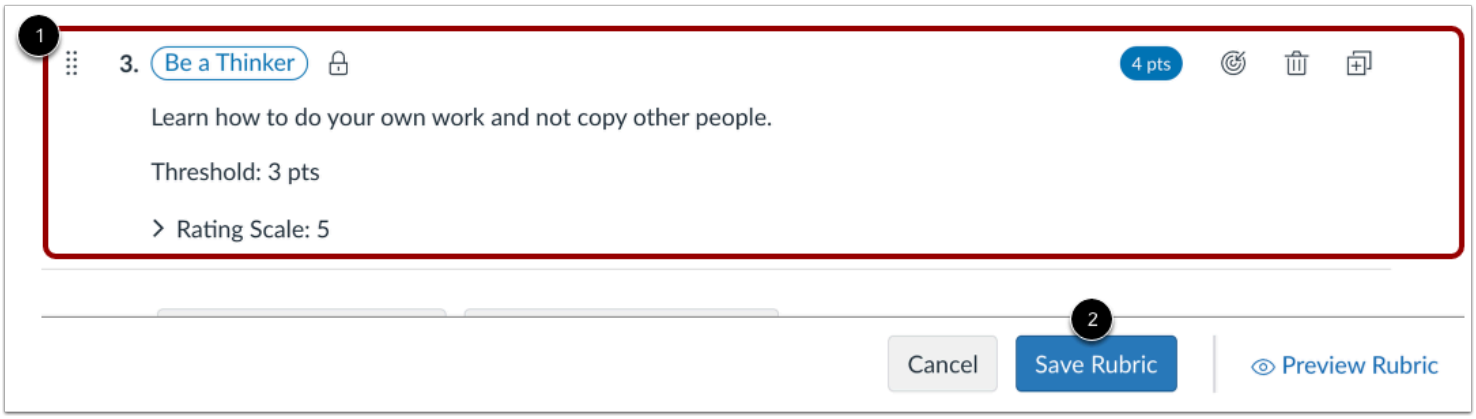
Import Outcome



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].

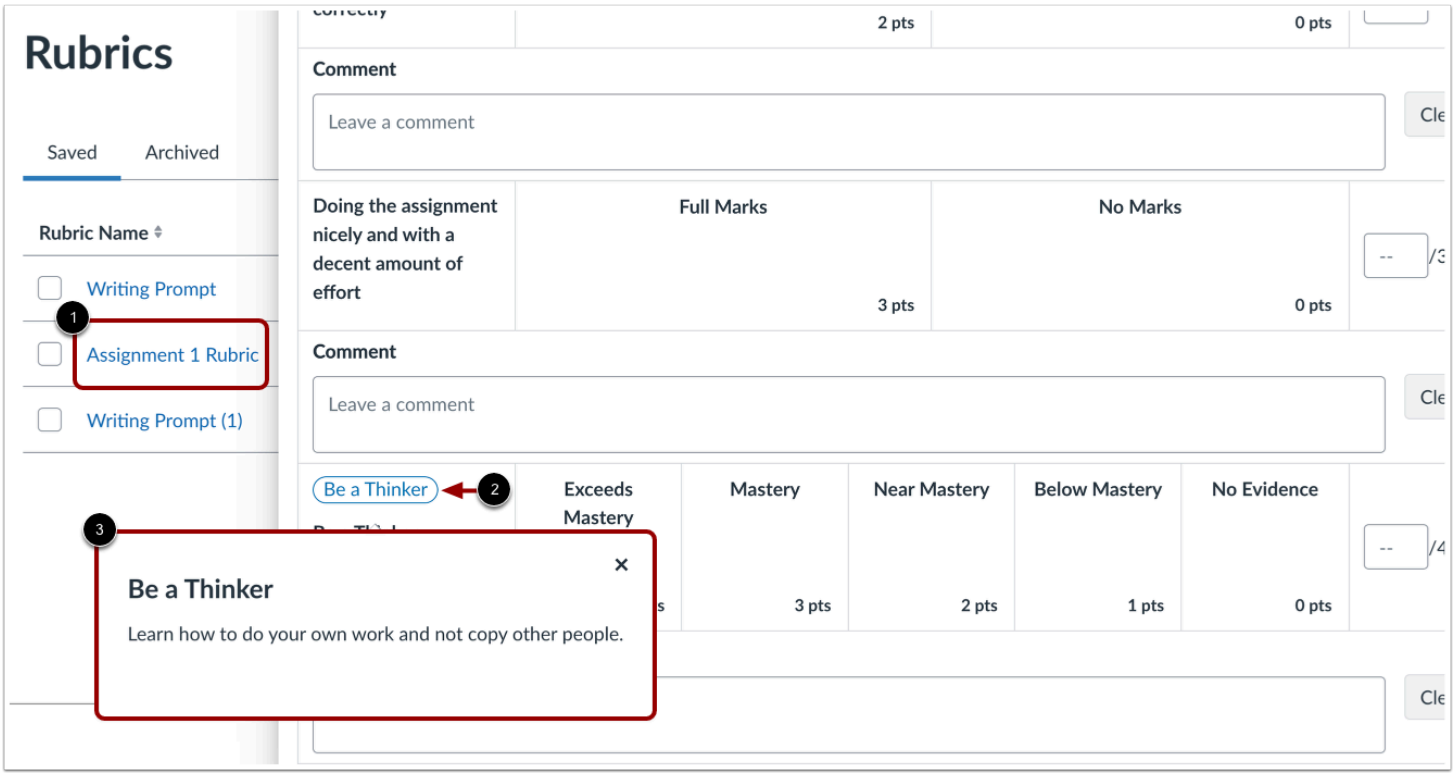
Note: Available outcomes may vary by institution.

Save Rubric



View the aligned outcome [1], then click the **Save Rubric** button [2].

View Rubric



To view the rubric, click the rubric name [1]. In the Rubric tray, you can view the details of an outcome by clicking the outcome link [2]. A pop-up displays [3].

Settings

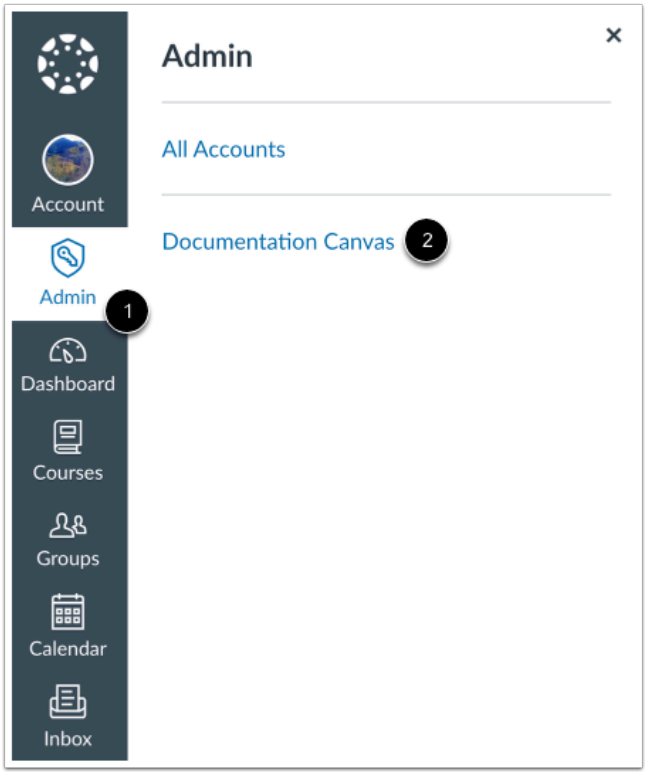
How do I use account settings?

As an admin, you can use your account settings to manage settings for your entire institution. Depending on your permissions, you can edit differing levels of the account settings.

View a video about Account Settings.

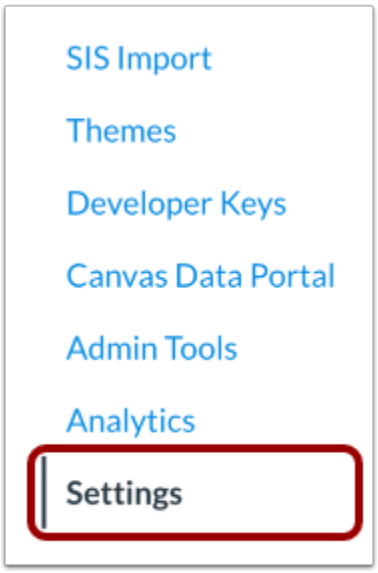
Note: In sub-accounts, not all account settings may be available.

Open Account



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

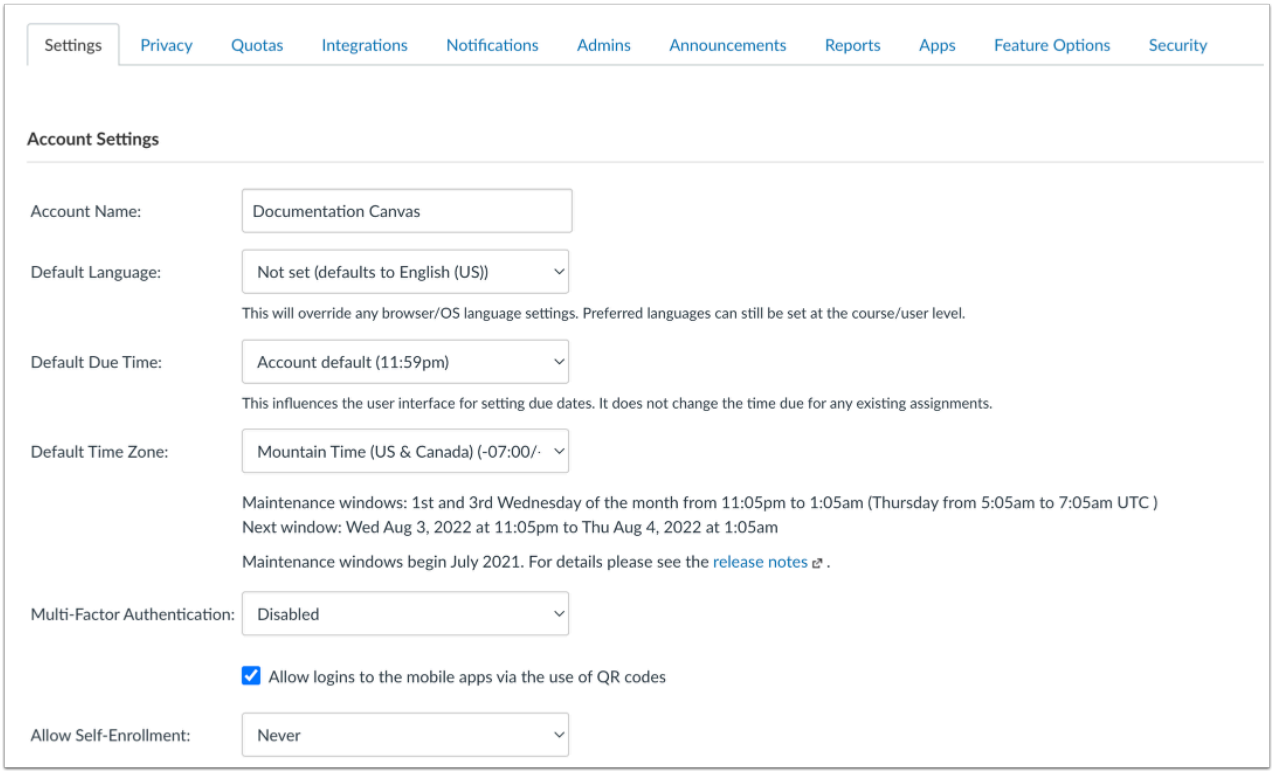
Open Settings



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

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

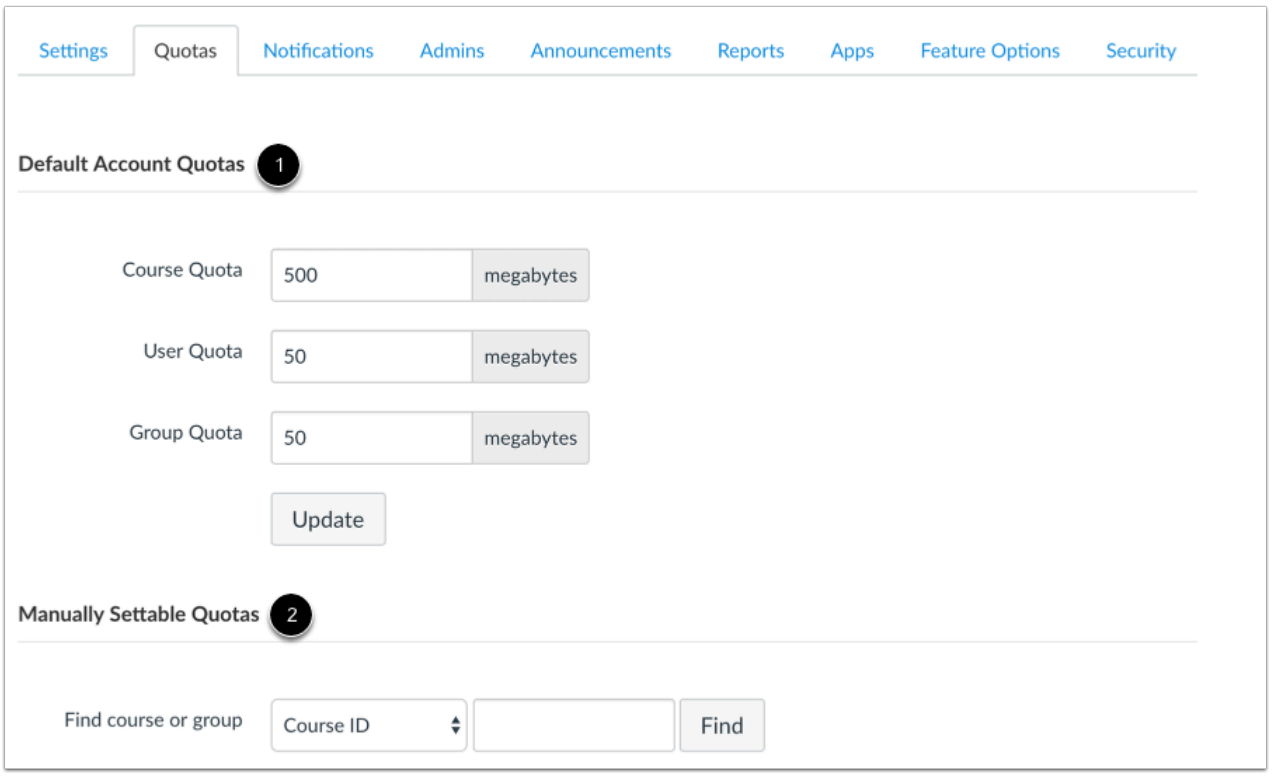
View Settings



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

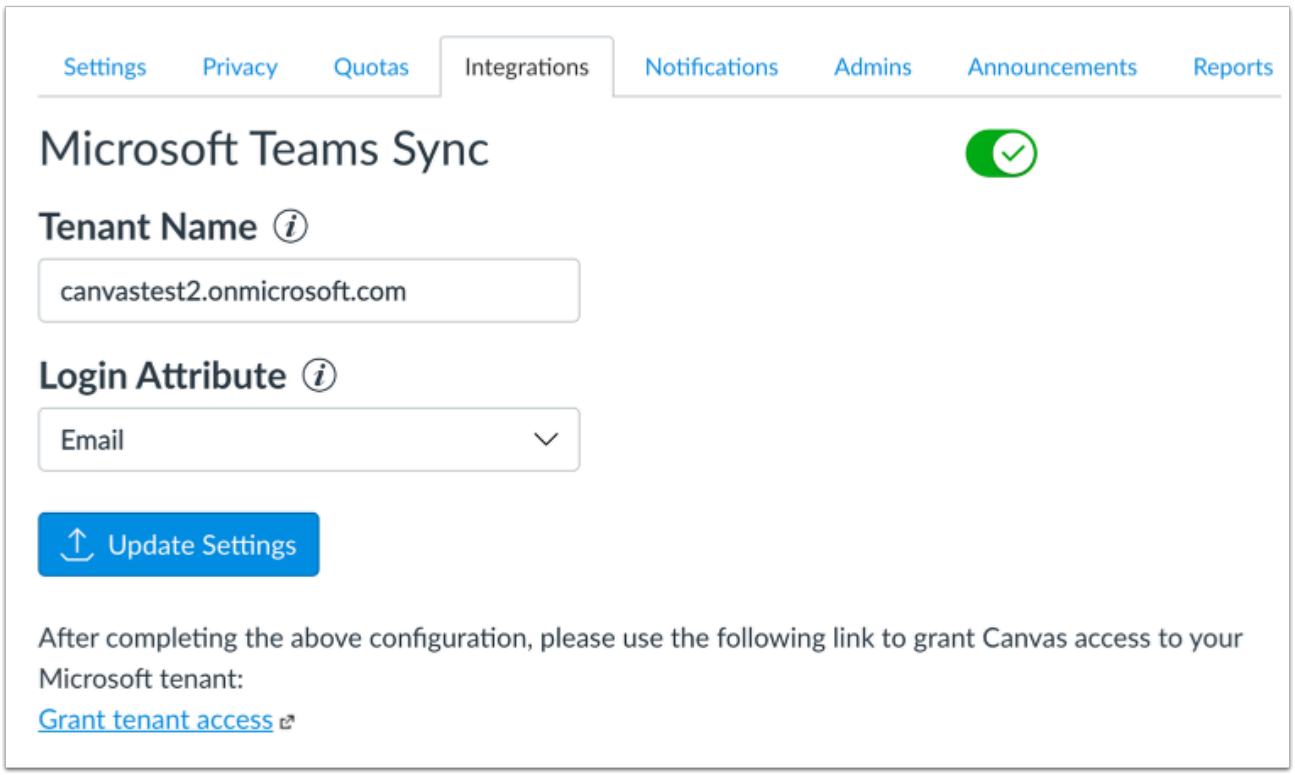
Note: The Default Due Time feature option must be enabled to view the Default Due Time drop-down menu.

View Quotas



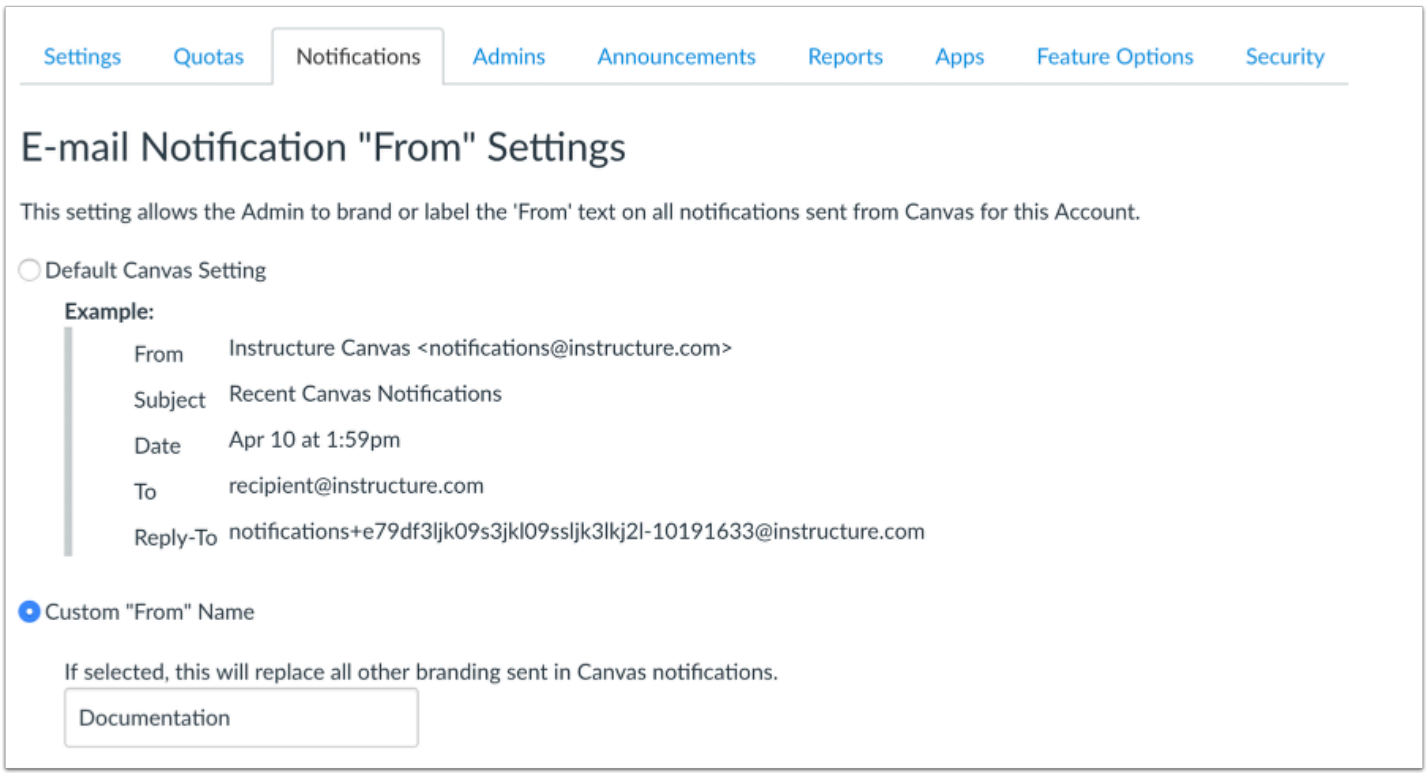
In the Quotas tab, you can set default account quotas for courses, users, and groups [1]. You can also set quotas by Course ID or Group ID [2].

View Integrations



If your account has enabled the Microsoft Group enrollment syncing feature option, you can view the Integration tab. From this tab, you can allow courses in your account to sync course data with Microsoft Teams.

View Notifications

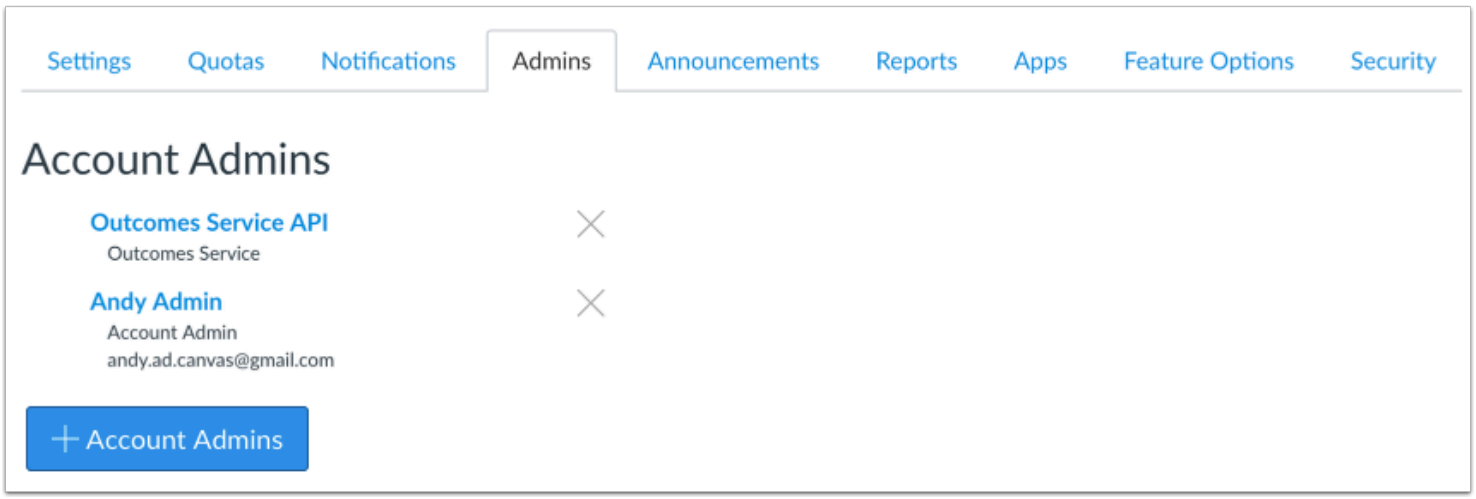


In the Notifications tab, you can change the settings for email notifications. You can choose to keep the default Canvas setting or change the Email Notification "From" Name for Canvas notifications. This custom text can be your institution name or whatever sender information you would like to use. Using the custom text field helps student identify notification emails more easily and improves the quality of student-instructor interaction.

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

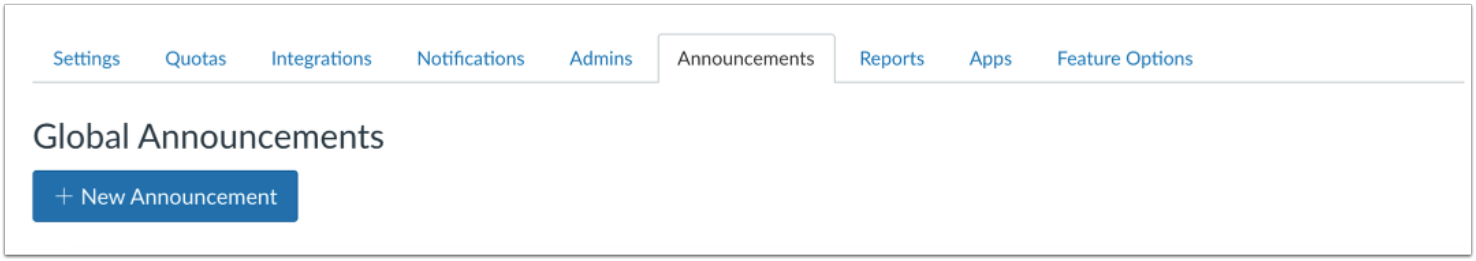
Note: Only root account admins can configure notification settings for an account. The Notifications tab is not available in sub-accounts.

View Admins



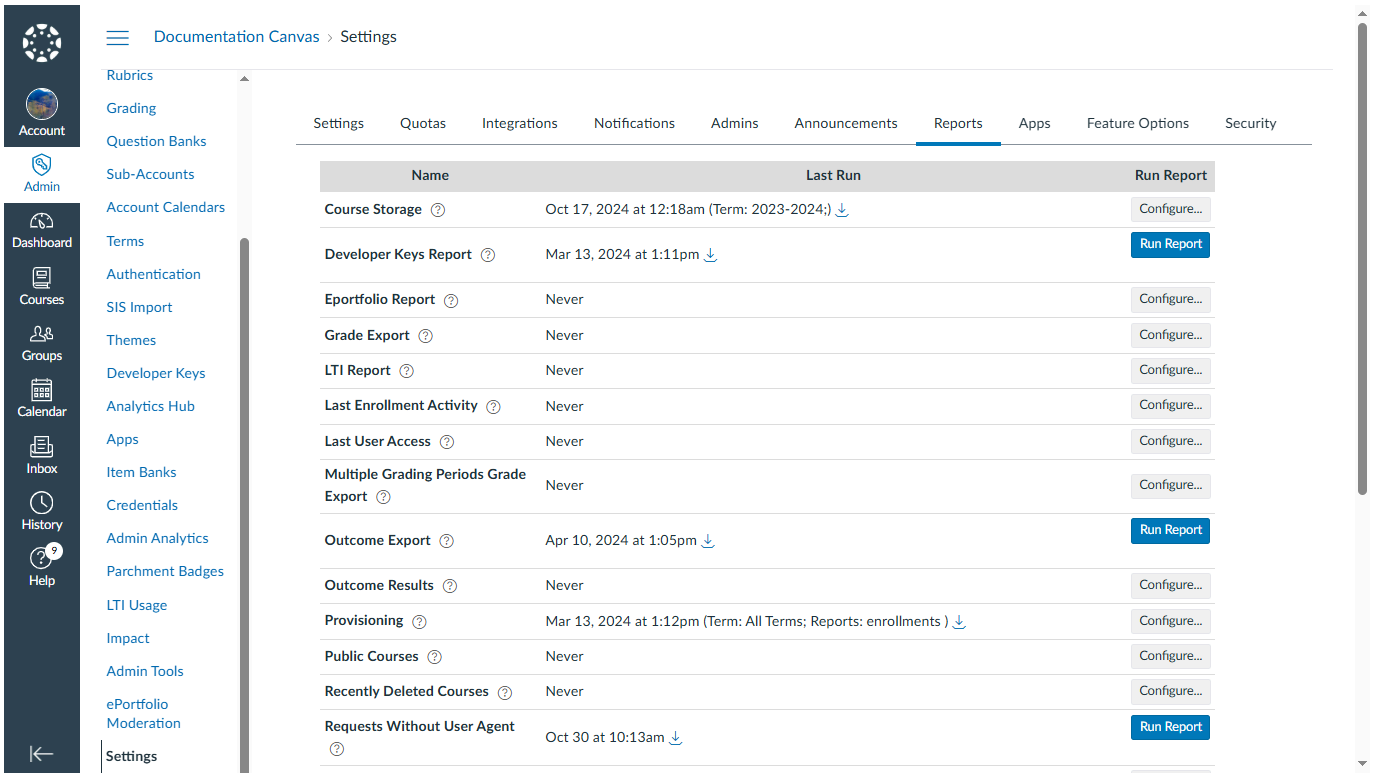
In the Admins tab, you can view and edit the admins assigned to this account. If you are working with sub-accounts, admin privileges are limited to the scope of just that sub-account and below. Learn how to add an administrative user to your account.

View Announcements



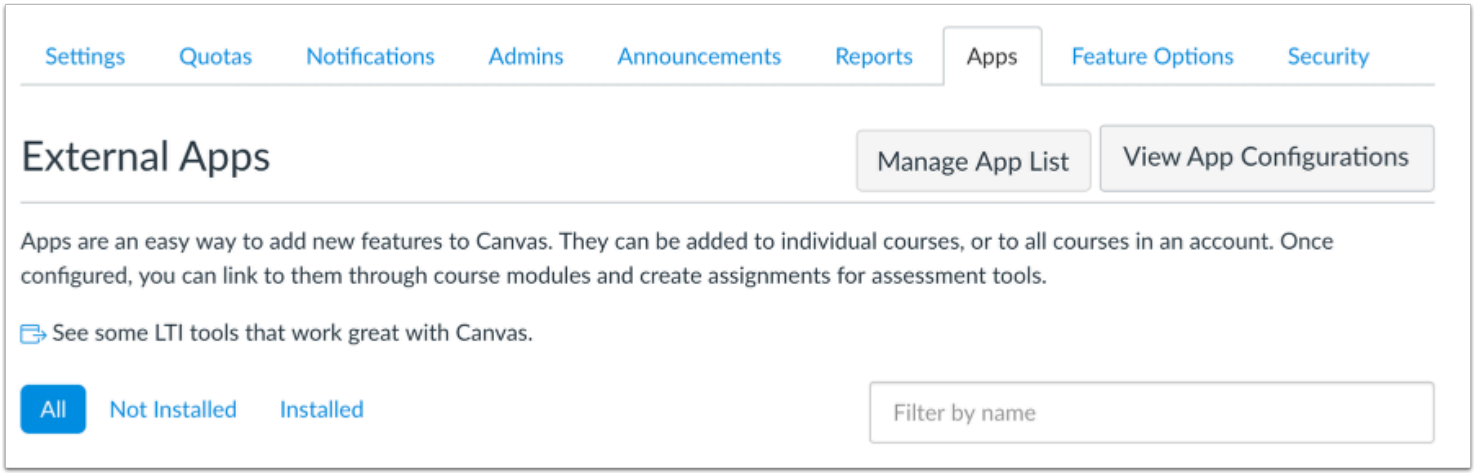
In the Announcements tab, you can send out global announcements to every user in that account. These announcements are used to announce events such as building closures, class cancelations, holidays, etc. Learn more about global announcements.

View Reports



The Reports tab is where custom reports will appear after you design them. There are many more reports available in Canvas, they just aren't listed on this page. They are available in context. Quiz reports, for example, are available from the quiz page itself. You can also run a report to identify APIs missing a User-Agent, helping ensure all API requests include this required header. User reports are available on the user's profile page.

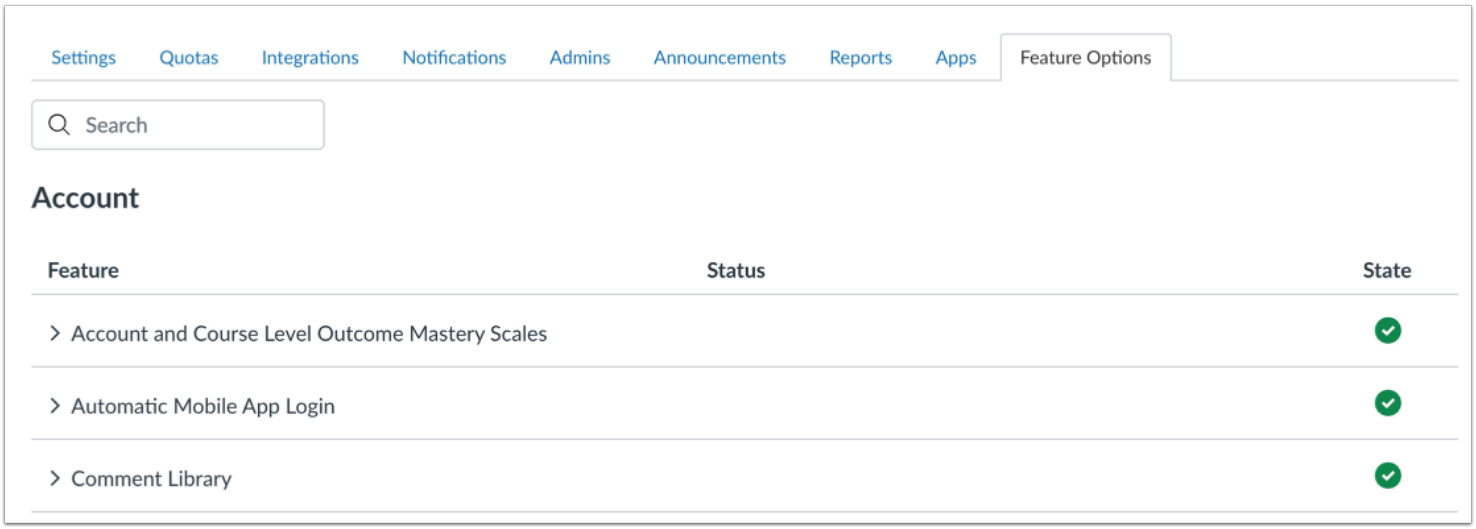
View Apps



If your institution has enabled the Canvas App Center, in the Apps tab you can view all available external learning tools in Canvas. However, you can also configure apps manually.

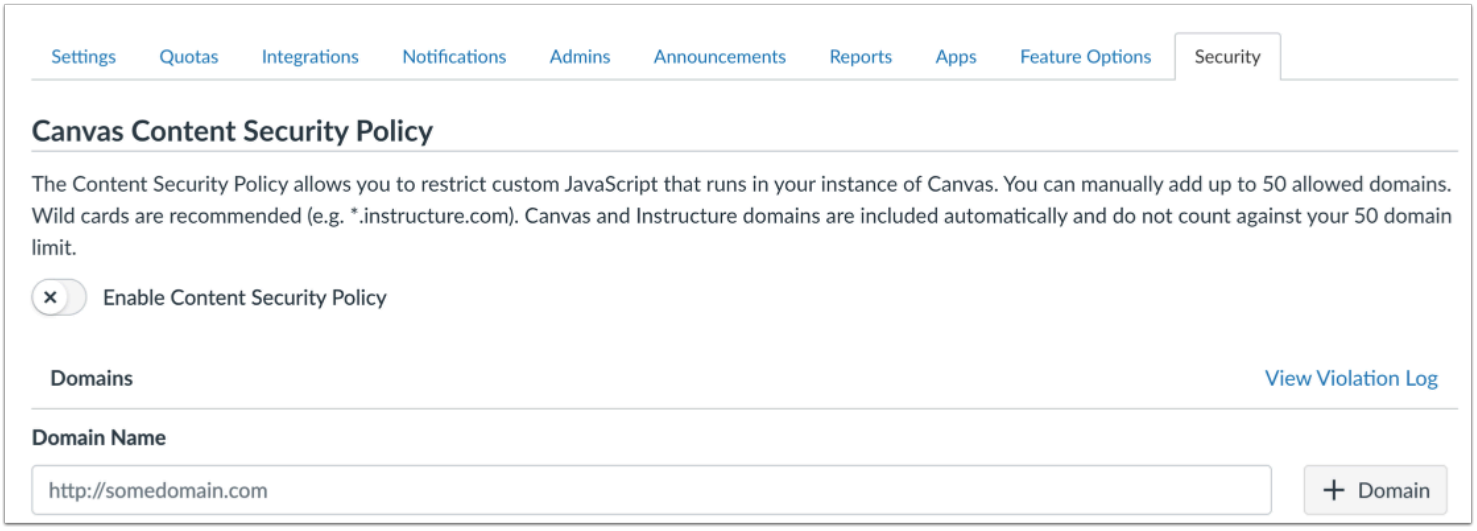
External learning tools are often developed as LTI integrations. These tools may be published along with a textbook, and access to these tools is often restricted to students in the course. Any LTI provider should be able to give you the information you need to configure the tool in Canvas. Once configured here at the account level, it is available to any course designer or instructor in the account.

View Feature Options



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

View Security



The Security tab is where the Content Security Policy can be managed. You can enable or disable the Content Security Policy and add or remove allowed domains.

Note: The Security tab only displays in Account Settings if the Content Security Policy feature option has been enabled.

How do I set details for an account?

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

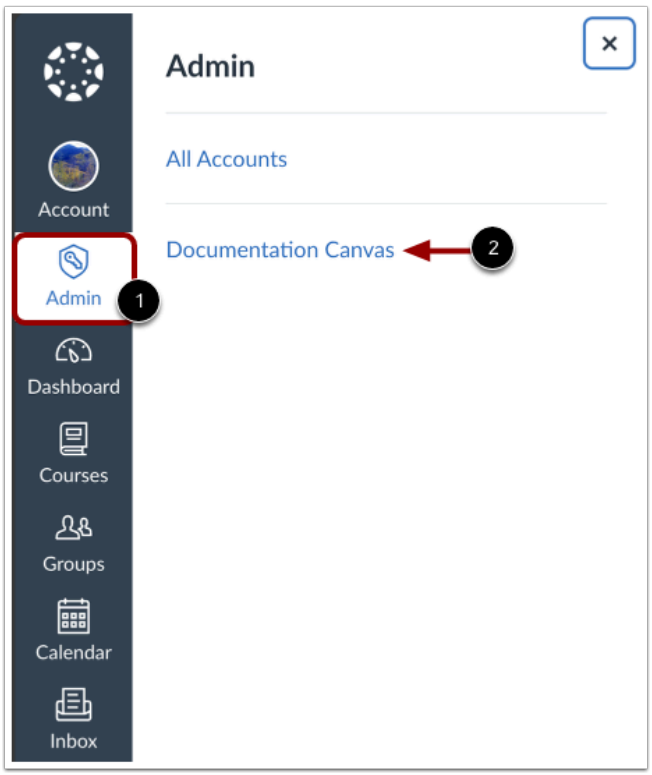
Not all settings and options are available to sub-account admins. The following restrictions apply to sub-account admins:

- Sub-account admins cannot manage the following account options and restriction settings: Default Time Zone, Allow Self-Enrollment, Login Label, Trusted HTTP referrers, Don't let teachers rename their courses, Students can opt-in to receiving scores in email notifications, and Restrict students from viewing quiz questions after course end date.
- Sub-account admins can only enable Equella, Turnitin, Analytics, and User Avatars.
- Sub-account admins cannot customize links for the help dialog box by default.
- Sub-account admins cannot enable web services by default.
- Sub-account admins cannot choose who can create new courses by default.
- Sub-account admins cannot enable personal pronouns within a sub-account.
- Sub-account admins cannot suppress notifications from being created and sent out.

Notes:

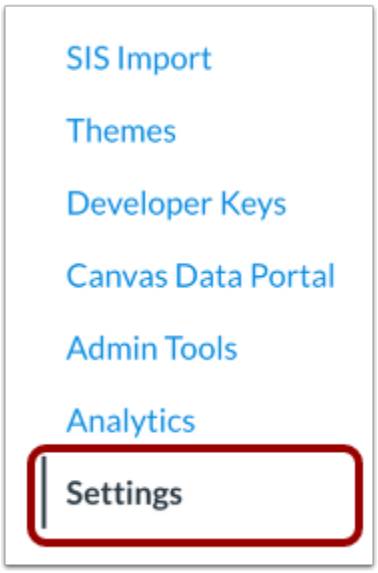
- Not all settings options are available for sub-accounts.
- This lesson indicates the settings that you can manage for your entire account. Other integrations may be available with the assistance of your Customer Success Manager.
- You can also control account settings by managing account feature options.

Open Account



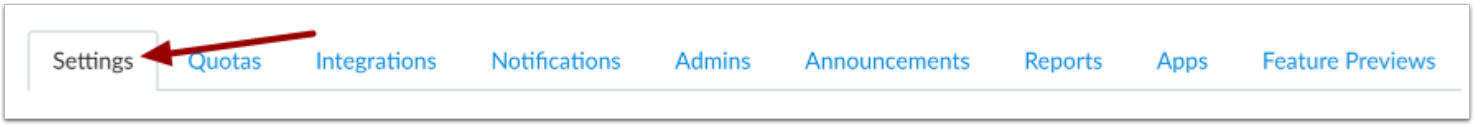
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



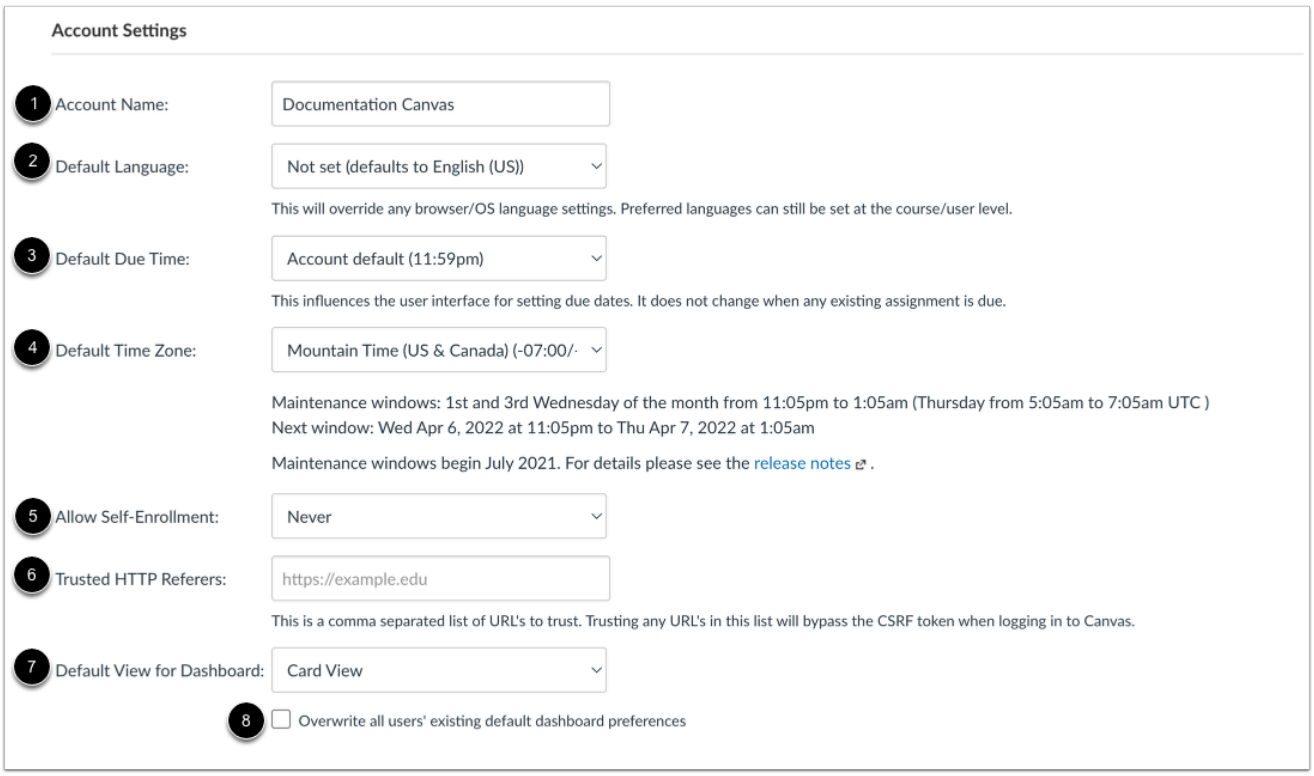
In Account Navigation, click the **Settings** link.

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



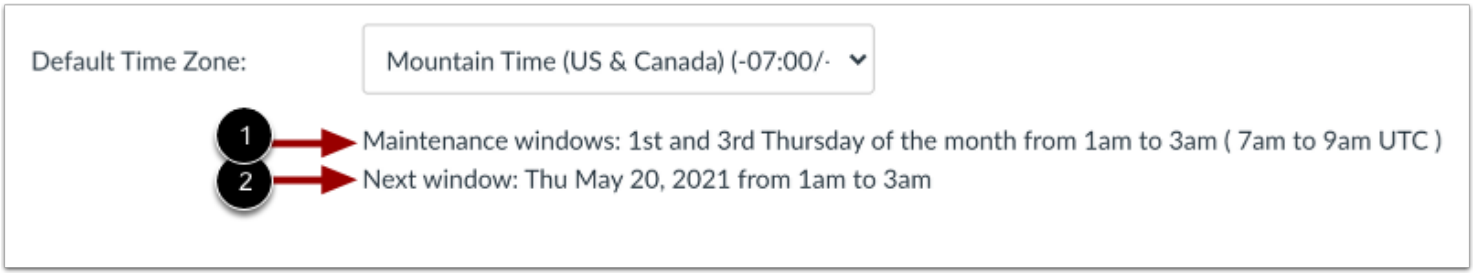
The Account Settings section allows you to specify settings for the entire account, including account name [1], default language [2], default due time [3], default time zone [4], and self-enrollment [5].

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.

You can set a default view for the Dashboard using the **Default View for Dashboard** drop-down menu [7]. Default options include Recent Activity, List View, and Card View. The setting defaults to the Card View. Specifying a default view applies to all new account users. Once a user has selected a different view, the default no longer applies.

If you want to apply the selected default view to all users in the account, select the **Overwrite all users' existing default dashboard preferences** checkbox [8]. However, users can change their dashboard view at any time in the dashboard options menu.

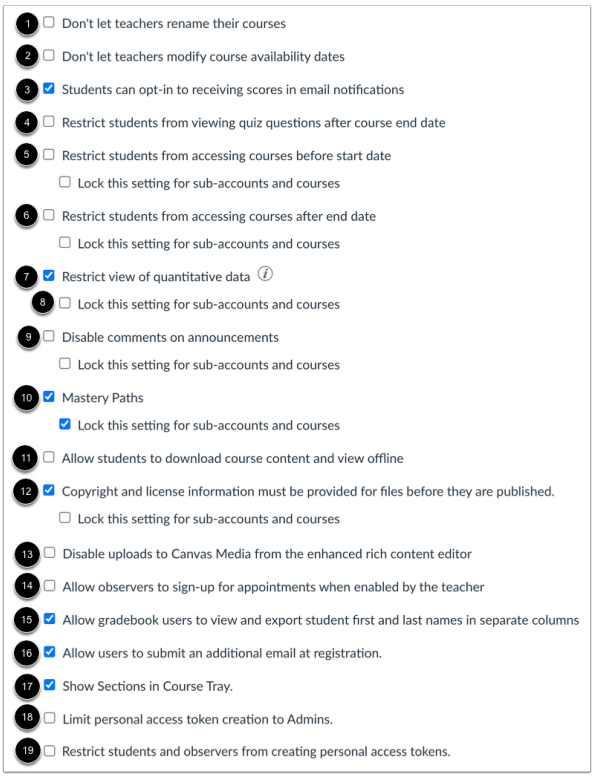
View Maintenance Window



The Default Time Zone settings also display the maintenance windows for your account. You can expect that all maintenance for your account will occur during your maintenance window unless emergency maintenance is required. Even though the windows are two hours each, your expected downtime shouldn't last for more than a few minutes. It is also possible that maintenance will not be necessary during your scheduled maintenance windows.

You can view the regular cadence when your maintenance windows take place [1] as well as the specific date and time of your next maintenance window [2].

Manage Restriction Settings



You can also manage restriction settings for the entire account.

If you do not want instructors to be able to rename their courses, click the **Don't let teachers rename their courses** checkbox [1].

If you do not want instructors to modify course availability dates, click the **Don't let teachers modify course availability dates** checkbox [2]. This checkbox does not display in the Account Setting page for sub-accounts.

To allow students to opt-in to receive scores as part of grading notifications, click the **Students can opt-in to receiving scores in email notifications** checkbox [3]. When this option is enabled, the user's Notification Settings 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 do not 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 [4].

You can choose to restrict student access to view courses before the course start date [5].

You can also choose to restrict student access to view courses after the course end date [6].

You can allow the restriction of quantitative data in a course [7], or you can restrict the view of quantitative data by students and observers in new courses [8].

You can also disable comments on announcements in all courses [9].

You can enable Mastery Paths for instructor's courses [10]. Mastery Paths allows instructors to customize learning experiences for students based on performance.

To allow users to download course content and view content offline for all courses, select the **Allow students to download course content and view offline** checkbox [11]. Alternatively, if you'd prefer to allow students to download course content and view content offline for specific courses, you can enable the ePub Exporting feature option for the course.

You can require that copyright and license information be provided for files before they are published [12].

You can also disable Canvas media uploads in the Rich Content Editor [13].

You can allow observers to sign-up for appointments when enabled by the teacher [14].

You can allow the option to split student names into two separate columns and show first and last names separately in the gradebook [15].

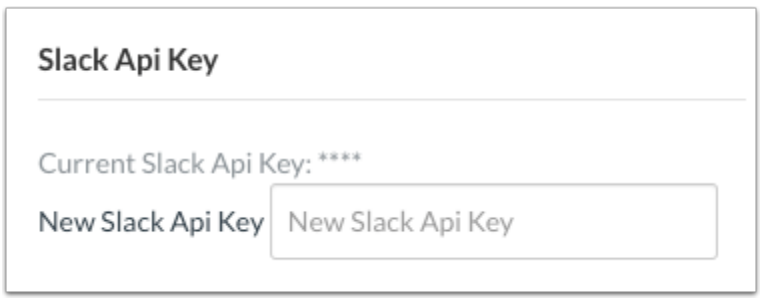
You can allow users to submit an additional email at registration [16].

To display or hide section details in the Courses menu in Global Navigation, click the **Show Sections in Course Tray** checkbox [17]. This account setting is enabled by default.

The Limit personal access token creation to Admins checkbox can be enabled to allow admin with the Users-Manage Access Token permission to generate access tokens [18].

You can also restrict students and observers from creating personal access tokens [19]. If a user holds multiple roles, their access follows the highest level of permissions assigned.

View Slack API Key

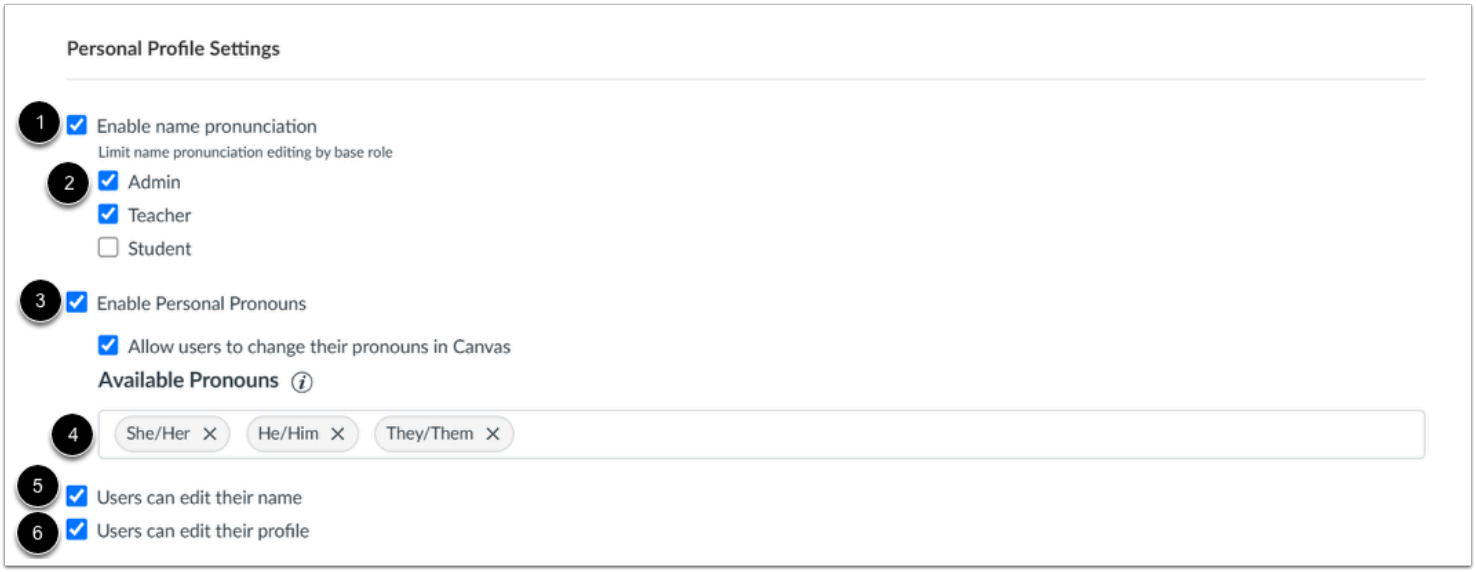


You can add a Slack API key in Account Settings to allow users to receive notifications in Slack. The Slack API Key is generated from an app created using the Slack API. To add a new Slack API key, type the Bot User OAuth Access Token copied from Slack in the **New Slack Api Key** field.

You can add a Slack API key in Account Settings to allow users to receive notifications in Slack.

Note: Creating a Slack App and generating an Access Token requires that you are also an admin user in Slack.

View Personal Profile Settings



The Personal Profile Settings section allows users to enable the pronunciation of their names by selecting the **Enable name pronunciation** checkbox [1]. Once enabled, users can limit name pronunciation editing by base role [2].

It also allows users to enable and customize personal pronoun options in their account [3]. When enabled, users can select a pronoun to display after their username in several areas in Canvas [4].

To allow users to edit their name as part of their user account settings, select the **Users can edit their name** checkbox [5].

By default, the **Users can edit their profiles** checkbox [6] is enabled.

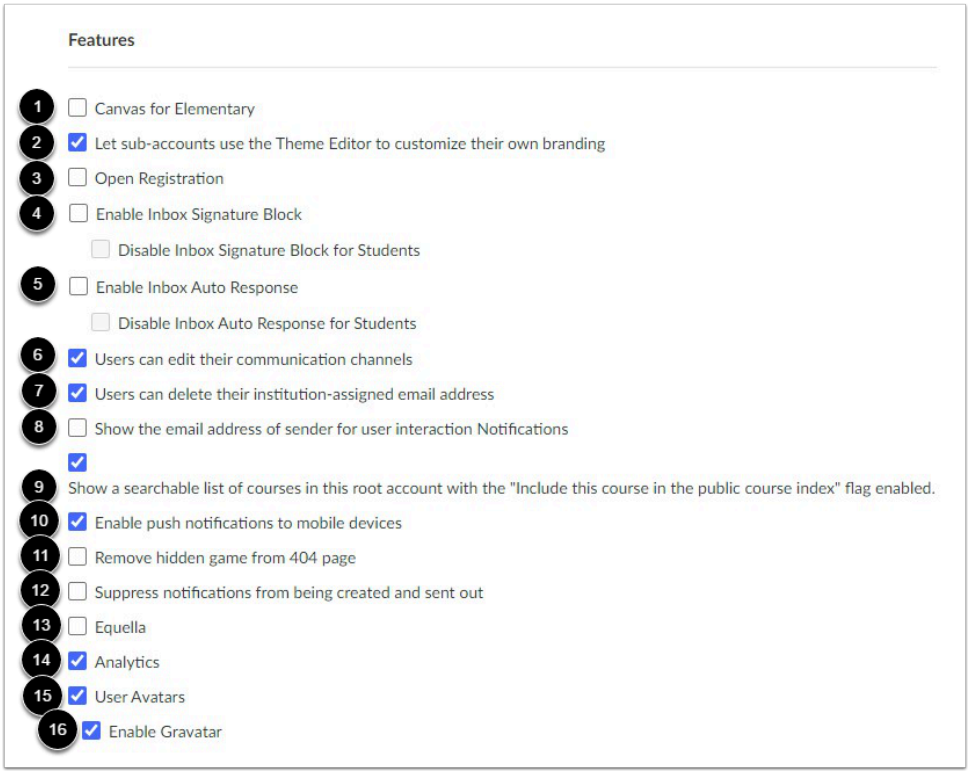
View Quiz IP Address Filters



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 resource document.

View Features



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

To enable Canvas for Elementary, select the **Canvas for Elementary** checkbox [1].

To allow sub-accounts to use the Theme Editor, select the **Let sub-accounts use the Theme Editor to customize their own branding** checkbox [2].

To allow users to be added to a course via email address without already having a Canvas user account, select the Open Registration checkbox [3].

To enable inbox signature, select the **Enable Inbox Signature Block** checkbox [4]. When enabled, select the Disable Inbox Signature Block for Students checkbox to disable inbox signature block for students.

To enable automatic responses, select the **Enable Inbox Auto Response** checkbox [5]. When enabled, select the Disable Inbox Auto Response for Students checkbox to disable inbox auto response to students.

In a Root Account, admins can disable users from editing communication channels. Additionally, when profiles are enabled by an institution, admins can disable users from editing their profiles. By default, the **Users can edit their communication channels settings** checkbox [6] is enabled.

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 [7]. If this feature is selected, also consider enabling the non-institutional email notification.

To display the sender's email address for user interaction notifications, click the **Show the email address of sender for user interaction Notifications** checkbox [8].

To show a searchable list of courses in the root account when the public course index setting is enabled, select the **Show a searchable list of courses in this root account with the "Include this course in the public course index" flag enabled** checkbox [9].

To enable push notifications for a mobile device, select the **Enable push notifications to mobile devices** checkbox [10].

To remove the hidden game within Canvas, select the **Remove hidden game from 404 page** checkbox [11].

To suppress notifications from being created and sent out from your Root Account, click the **Suppress notifications from being created and sent out** checkbox [12].

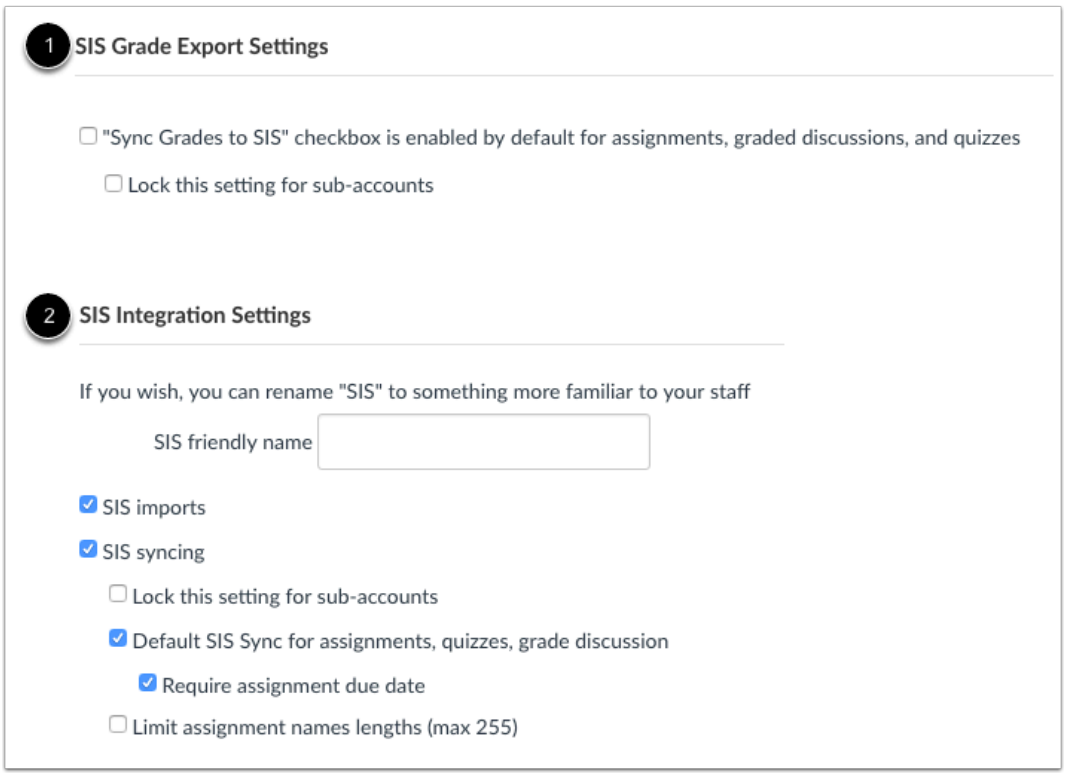
To allow users to integrate content with Equella, select the **Equella** checkbox [13].

To enable analytics for the account, select the **Analytics** checkbox [14].

To allow users to upload a profile picture in their user accounts, select the **User Avatars** checkbox [15]. When this feature is enabled, you can manage profile pictures for all users. This feature is independent of the Profiles feature, which must be enabled by a Customer Success Manager.

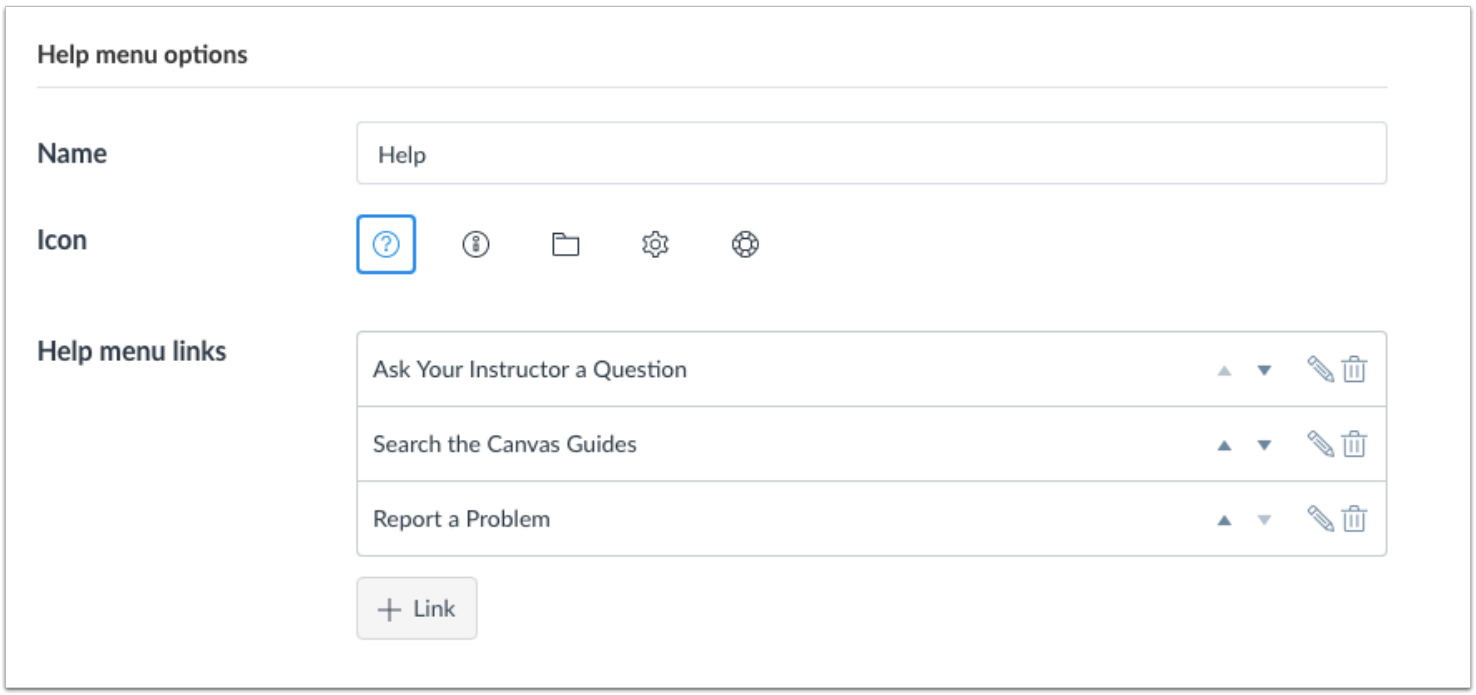
When the User Avatars checkbox is selected, the **Enable Gravatar** checkbox is also selected by default [16]. A Gravatar is a globally recognized avatar associated for a user in any website that supports Gravatars. When Gravatars are enabled in an account, users can import their Gravatar when selecting a profile picture in their user settings page. Gravatars are associated with the user's Gravatar email address. When Gravatars are disabled, the From Gravatar tab is not included as an option in the Select Profile Picture window.

View SIS Grade Export Settings



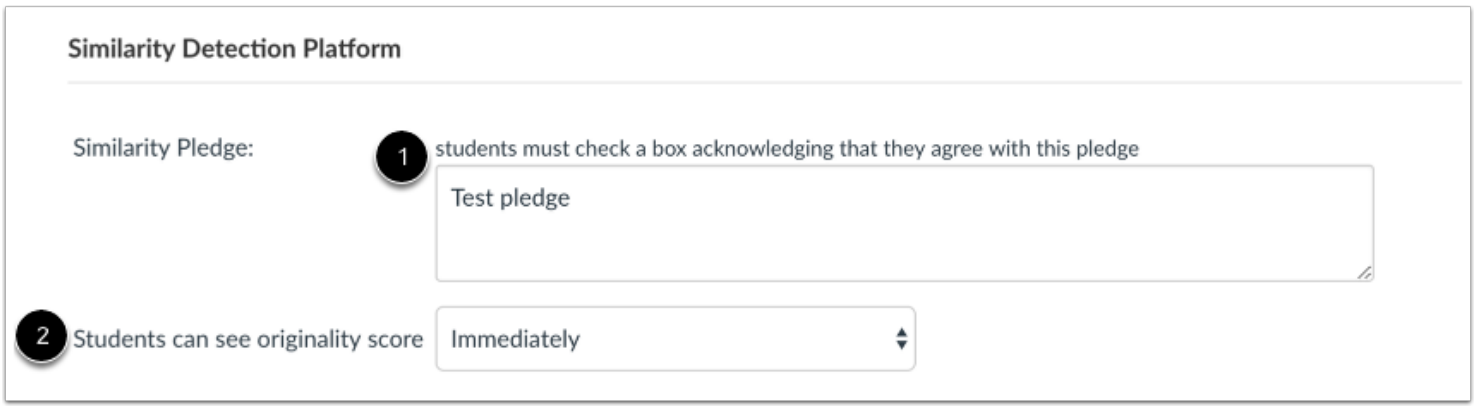
If you have integrated your account with a student information system (SIS), depending on your institution's configuration, you can either configure SIS submissions for your entire account [1] or manage SIS integration settings [2].

View Help Menu Options



As an account admin, you can customize the Help menu that appears in Canvas for all users. You can also add custom help links for your institution and have them display to all or specific user roles.

View Similarity Detection Platform

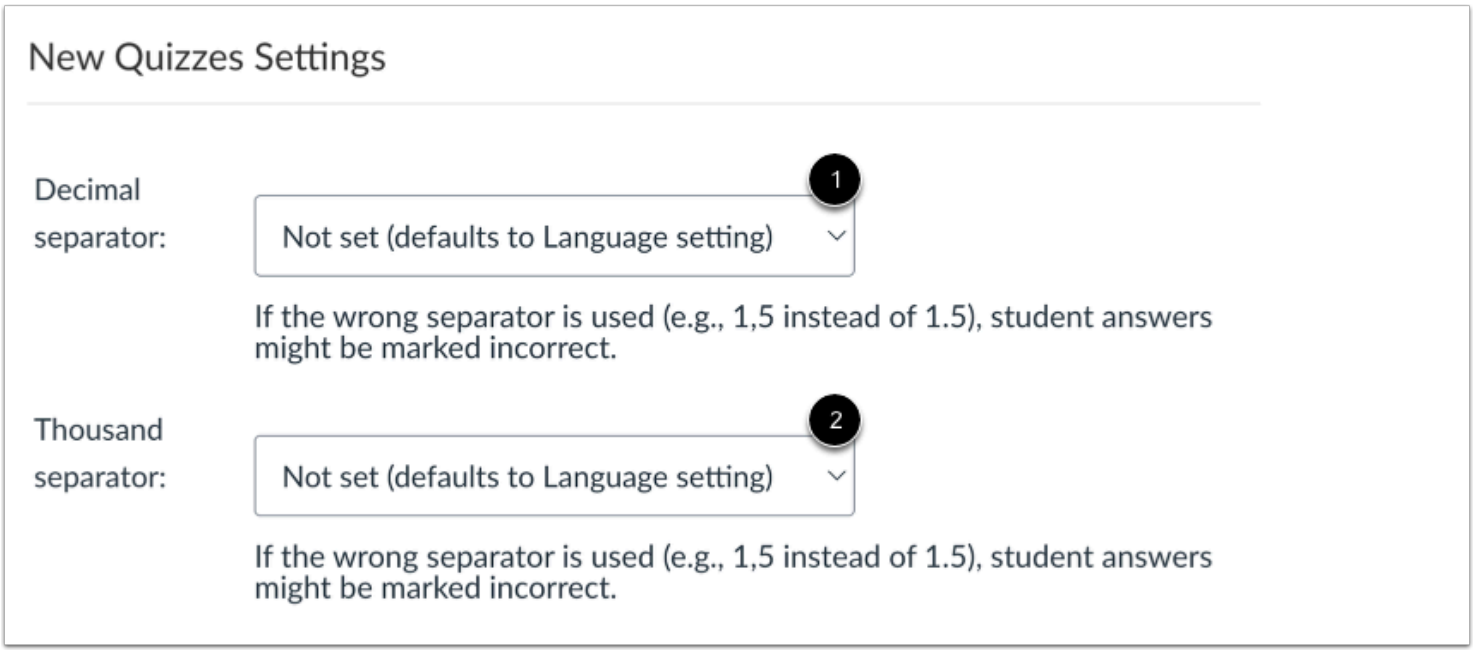


The Similarity Detection Platform section displays for all accounts and is used for plagiarism LTI tool integrations.

If your account has installed at least one plagiarism LTI tool, any content you include in the Similarity Pledge text field will display to students [1]. Similarity pledges require students to check a box acknowledging they agree with the pledge information, which usually asks them to verify their work is their own and that any sources have been properly cited.

You can also set the originality score default for the entire account in the **Students can see originality score** drop-down menu [2]. You can set the report to generate immediately upon assignment submission, after an assignment is graded, after an assignment due date, or never. The account default is not required and can be changed at any other level. Subaccounts can set a separate default from the account, and individual assignments within a course can set their own originality preferences as well.

View New Quizzes Settings



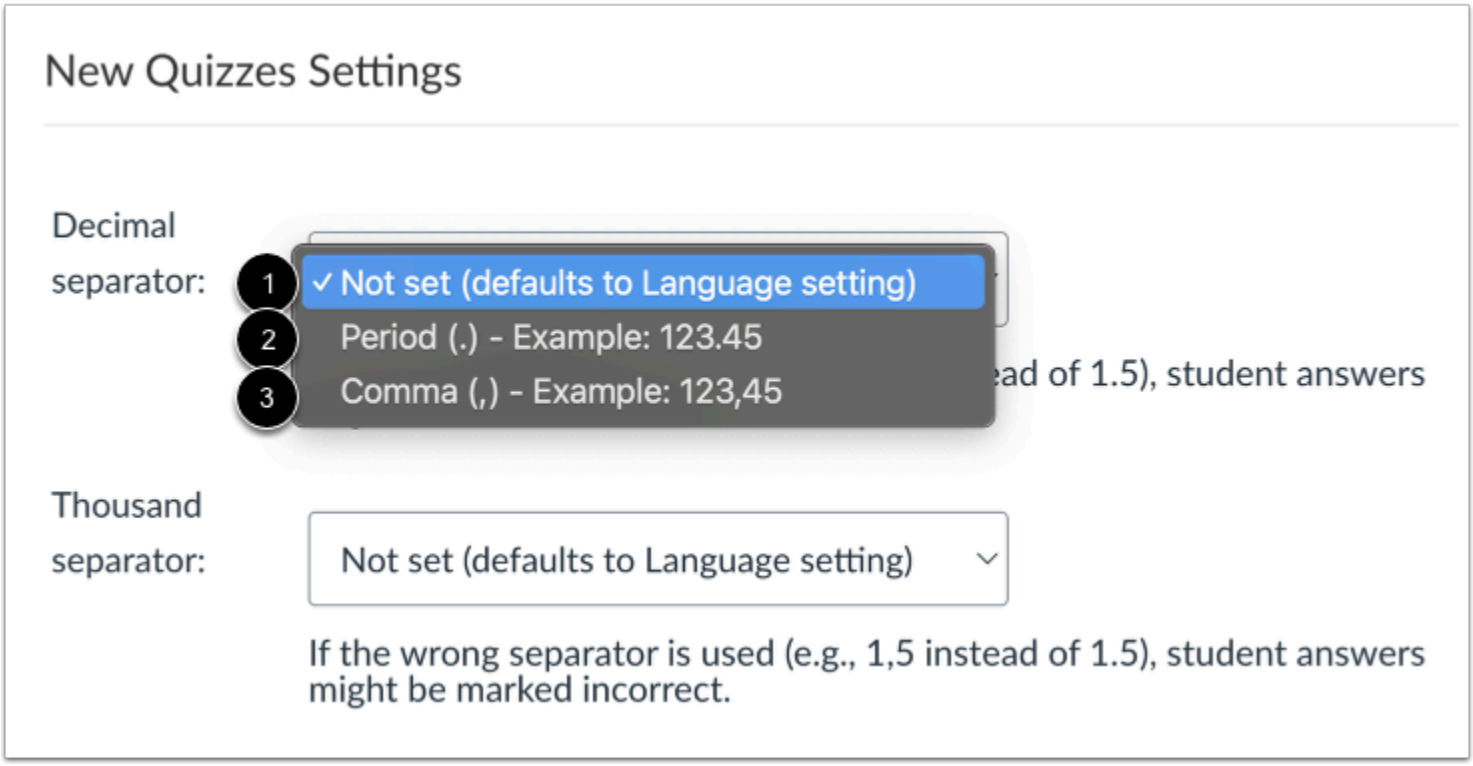
In the New Quizzes Settings section, you can set the thousand and decimal separators for number formatting in New Quizzes.

To set the decimal separator, click the **Decimal separator** drop-down menu [1].

To set the thousand separator, click the **Thousand separator** drop-down menu [2].

Note: Both fields must either be set or left empty. If set, the two fields cannot have the same value.

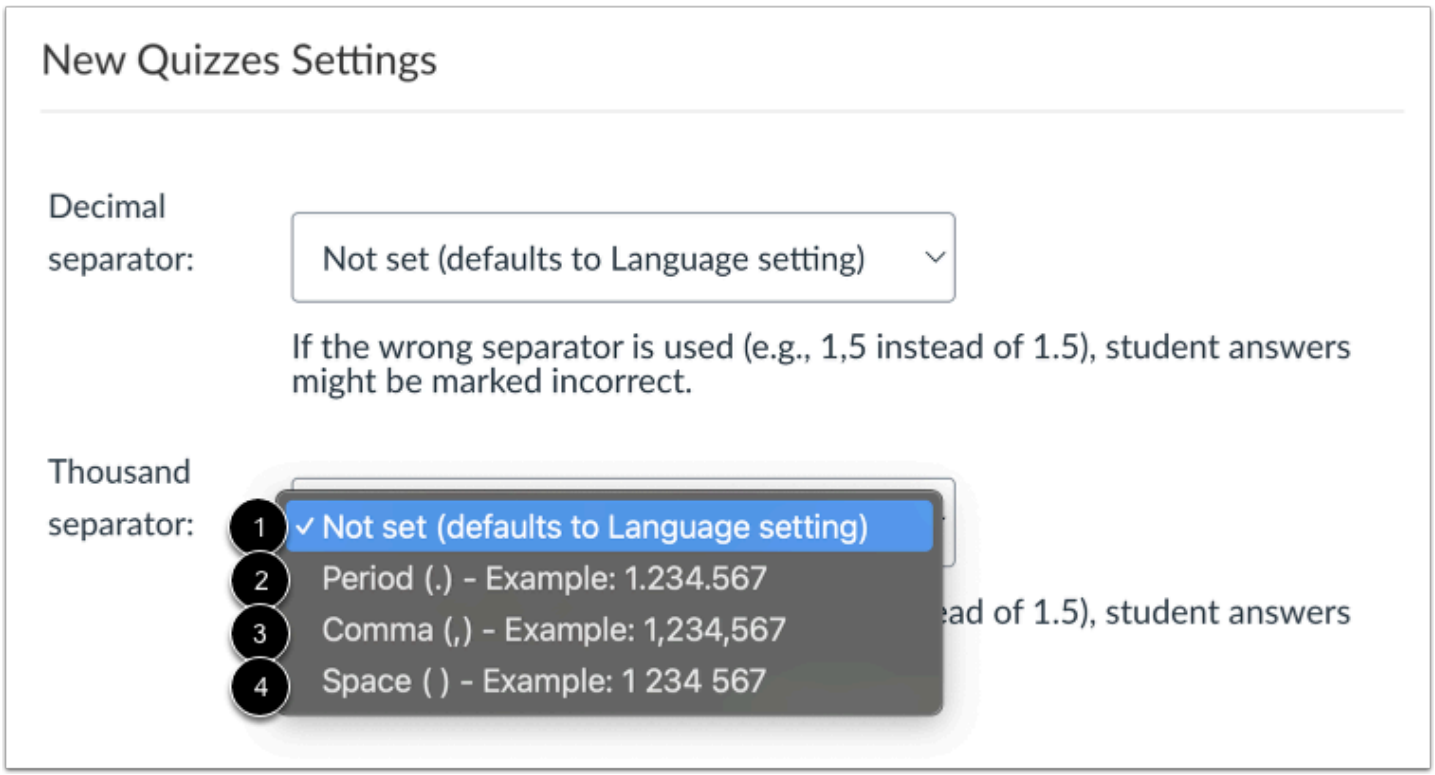
Set Decimal Separator



Select a decimal separator from the following options:

1. **Not set (defaults to Language setting)**
2. **Period (.) - Example 123.45**
3. **Comma (,) - Example 123,45**

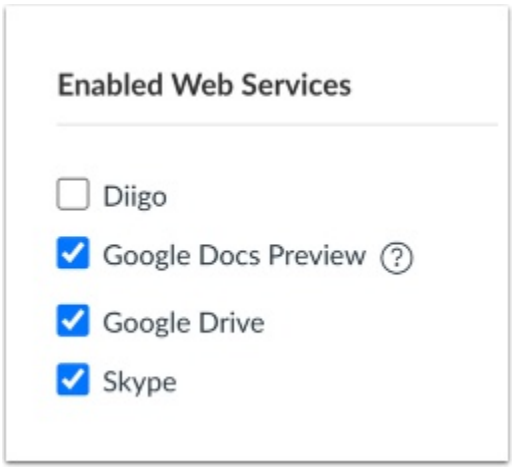
Set Thousand Separator



Select a thousand separator from the following options:

1. **Not set (defaults to Language setting)**
2. **Period (.) - Example: 1.234.567**
3. **Comma (,) - Example: 1,234,567**
4. **Space ( ) - Example: 1 234 567**

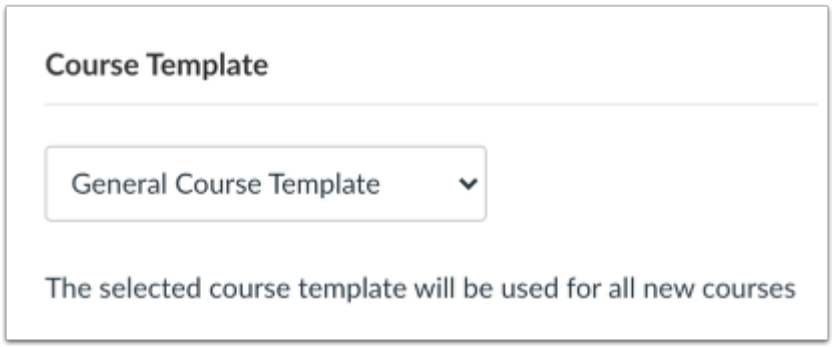
View Web Services



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 Settings.

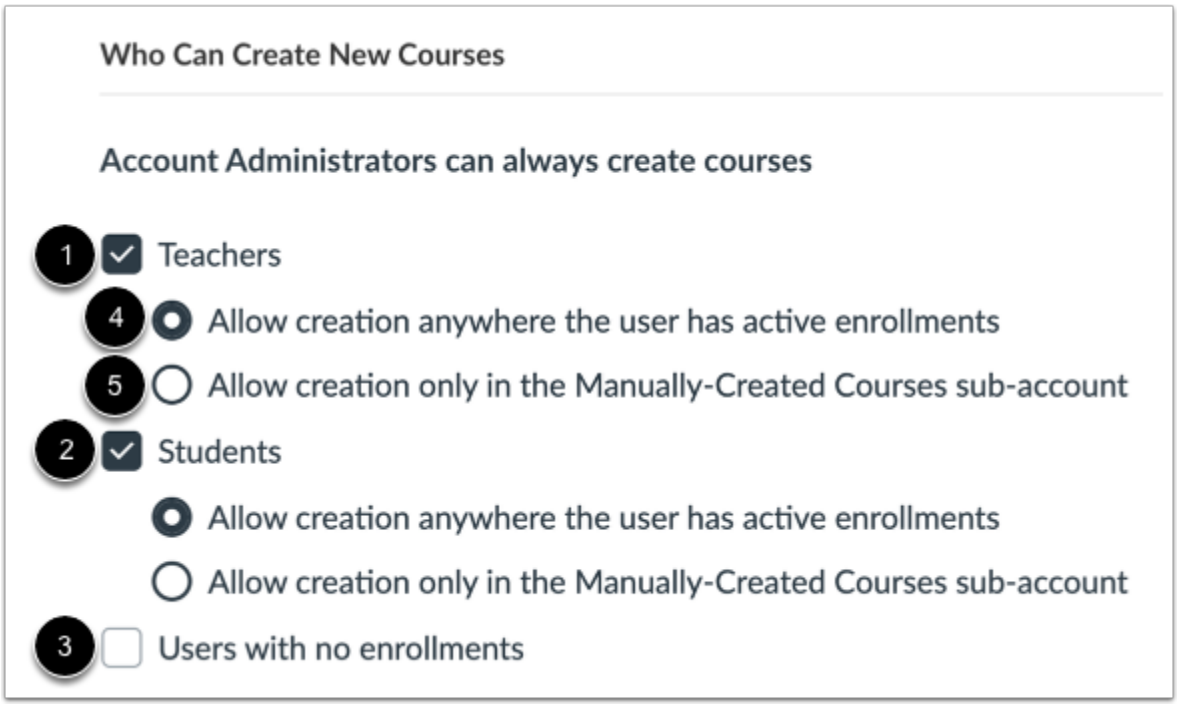
Note: If you enable the Google Apps LTI for your entire institution, you do not need to enable the Google Drive web service for your students.

View Course Template



If a course has been designated as a course template, you can select the template to be used for all new courses in your account or sub-account.

View Who Can Create New Courses



You can choose who can create new courses within your account in addition to account administrators. This setting allows the selected user(s) to create new course shells by clicking the **Create a New Course** button in the Dashboard.

You can allow teachers (instructors) [1], students [2], and/or users with no enrollments [3] to create courses in your account.

You can also manage where new courses created by instructors and students can be placed. To allow courses to be created in any account where an instructor or student has an active enrollment, click the **Allow creation anywhere the user has active enrollments** checkbox [4]. To allow courses to only be created in the Manually-Created Courses sub-account, click the **Allow creation only in the Manually-Created Courses sub-account** checkbox [5].

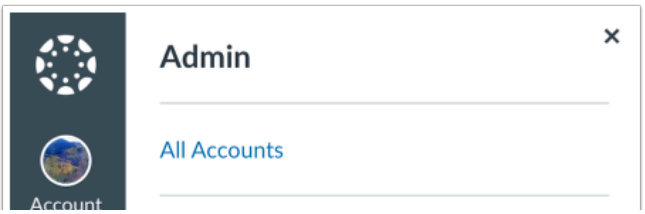
Copied courses are added to the same subaccount as the course that was copied.

Note: Account administrators can always create courses.

Update Settings



Click the **Update Settings** button.



How do I enable personal pronouns in an account?

You can enable personal pronouns in an account, add pronoun options, and customize how pronouns are displayed.

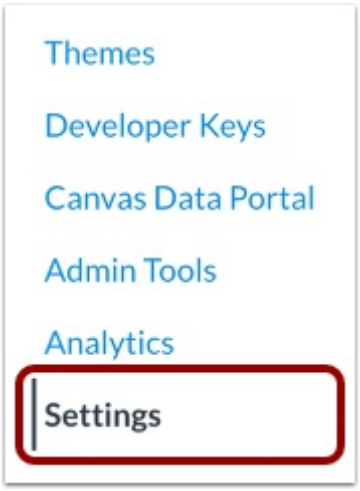
When pronouns are enabled, users can select their personal pronouns in their User Settings. These pronouns will display with their username in the following areas in Canvas:

- Act as User Page
- Assignment Creation Menu
- Assignment Peer Review Page
- Course Sections List
- Discussions
- People Pages (Account, Course, and Group)
- Student Context Card
- User Navigation Menu
- User Profile
- User Settings

Notes:

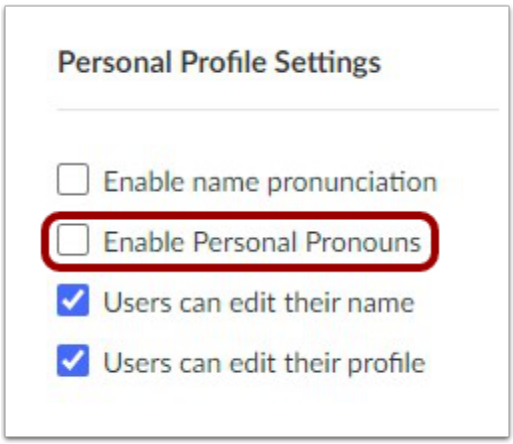
- Sub-account admins cannot enable personal pronouns within a sub-account.
- LTI tools, such as New Quizzes and Analytics, do not currently support displaying pronouns.
- To manage personal pronouns via the Canvas API, personal pronouns must be enabled in the account.

Open Settings



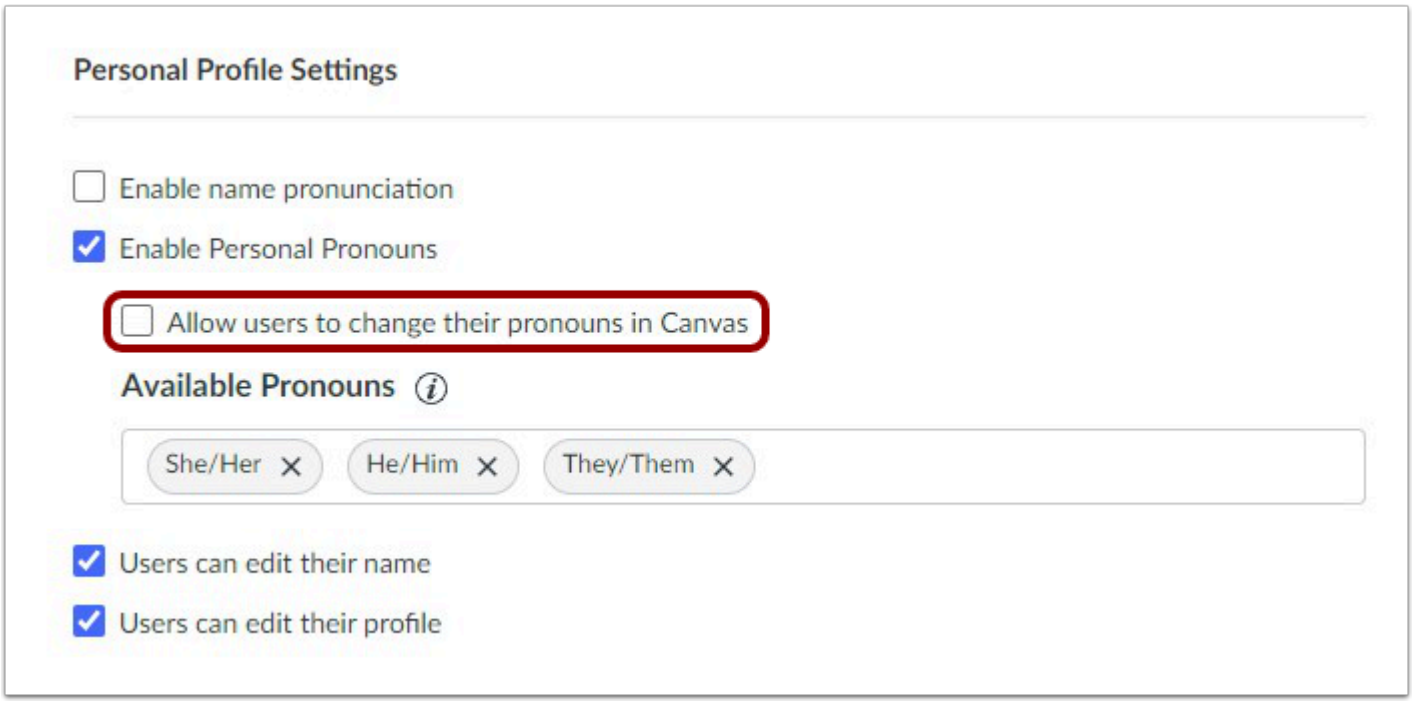
In Account Navigation, click the **Settings** link.

Enable Personal Pronouns



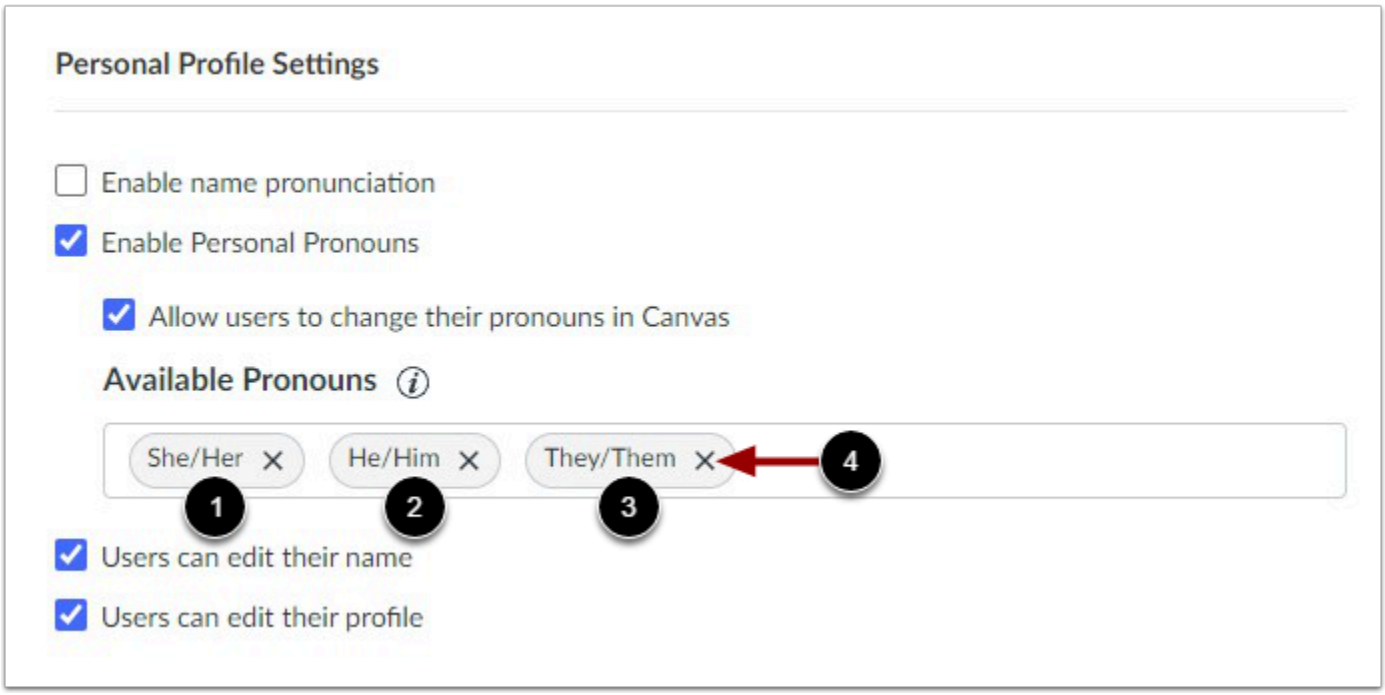
Personal pronouns are disabled by default. To enable personal pronouns, click the **Enable Personal Pronouns** checkbox.

Allow Users to Change Pronouns



To allow users to change their pronouns, click the **Allow users to change their pronouns in Canvas** checkbox.

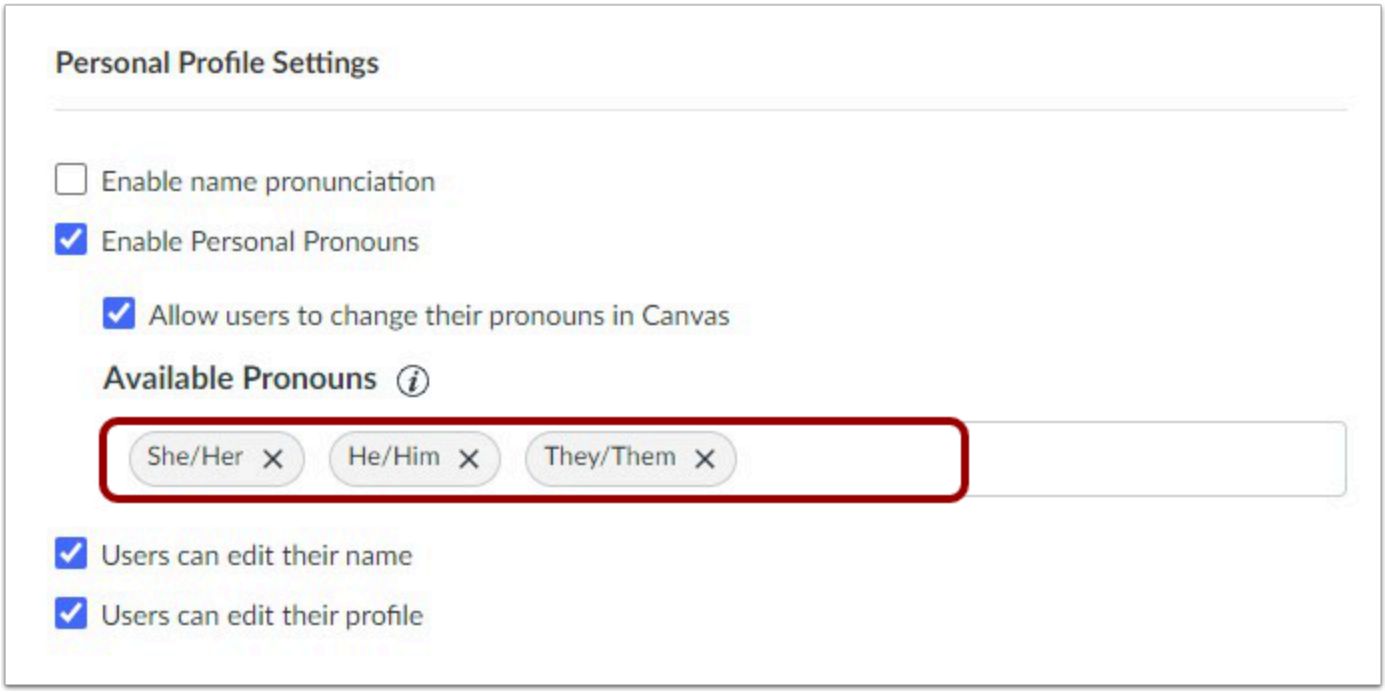
View Pronoun Options



By default, users in your account will be given three pronoun options: She/Her [1], He/Him [2], and They/Them [3]. To edit a pronoun option, remove the pronoun option and add the modified version.

To remove a pronoun option, click the **Remove** icon [4].

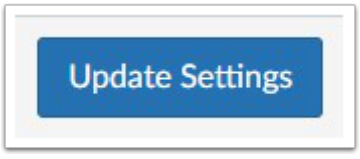
Add Pronoun Option



To add a new pronoun option, type the new pronoun option in the Available Pronouns field. Press the Return or Enter key on your keyboard to add the new pronoun option.

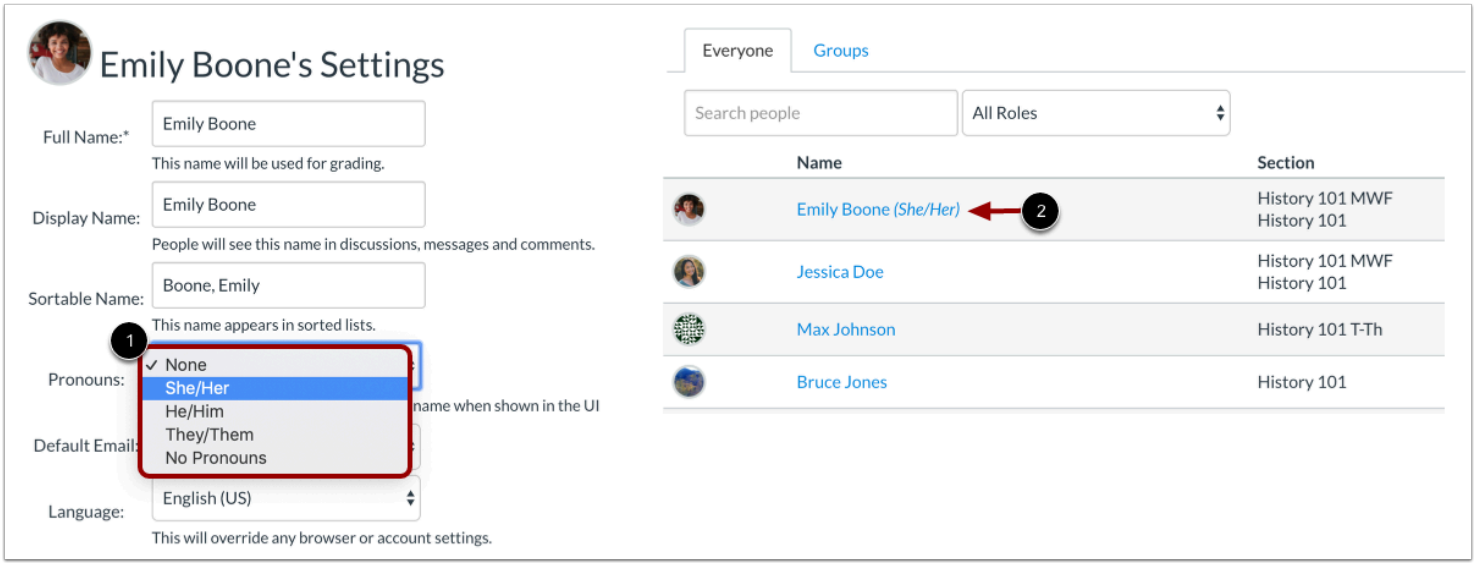
Note: The Available Pronouns field accepts a maximum of 50 characters for a new pronoun option.

Update Settings



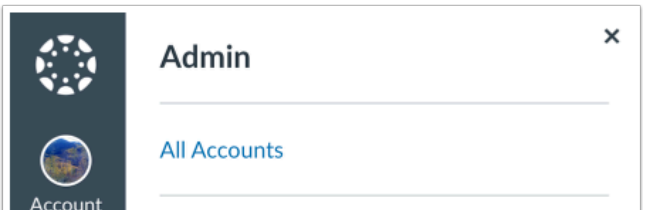
To save your personal pronoun options, click the **Update Settings** button.

User View



When pronouns are enabled and users are allowed to change their pronouns, users can select their personal pronoun option in their User Settings [1]. Only pronouns enabled in Account Settings can be selected; users cannot manually add their own pronouns.

Their personal pronouns will display after their name in areas throughout Canvas [2].



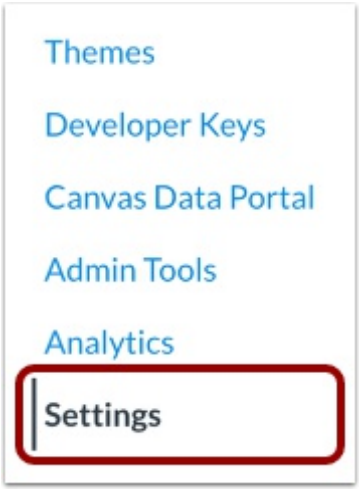
How do I enable web services for an account?

Third-party integrations can be enabled as web services for an entire Canvas account.

Web services can be used to extend the functionality of a user's Canvas profile. The user can also configure their notification settings in their Notification Settings.

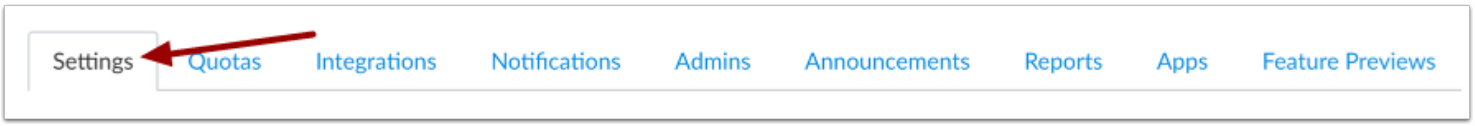
Note: By default, sub-account admins cannot enable web services.

Open Settings



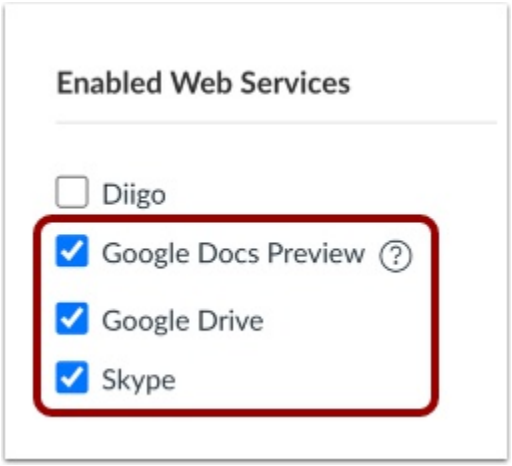
In Account Navigation, click the **Settings** link.

View Settings



Account Settings defaults to the Settings tab.

Enable Web Services



In the Enabled Web Services section, check the boxes of the web services you'd like to enable.

Note: If the Google Apps LTI has been enabled for your entire institution, you do not need to enable the Google Drive web service for your students.

How do I set storage quotas for an account?

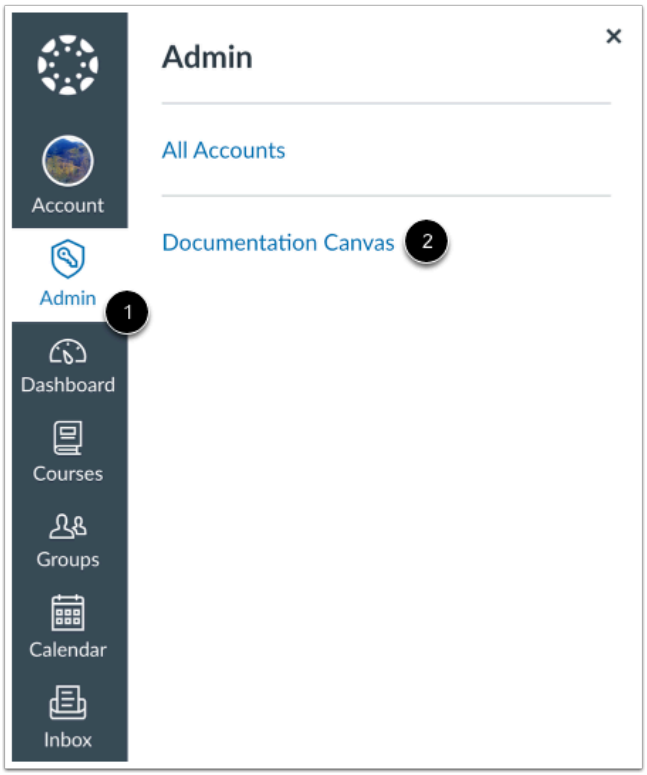
In the Quotas tab, you can set default account quotas for courses, users, and groups. You can also set quotas by Course ID or Group ID.

You can view the total number of files used across the entire account in account statistics.

Notes:

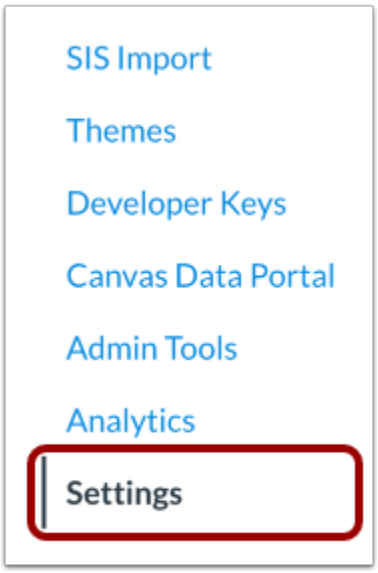
- Sub-account admins cannot manage user quotas.
- When an instructor copies a large course into a course shell, Canvas does not duplicate the course files and instead references the original files in Canvas. However, when an instructor uses the Course Import Tool to import a course larger than their allowed course quota, the import will fail.
- The child account will inherit the quota setting from the parent account and will be able to change it.

Open Account



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

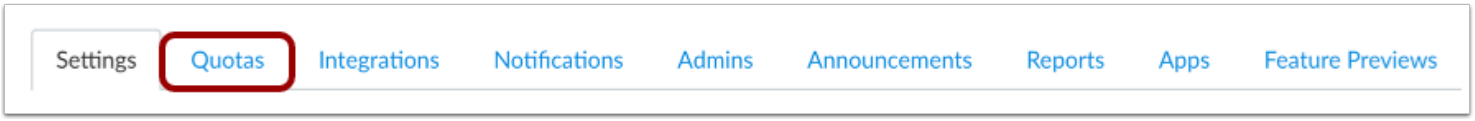
Open Settings



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

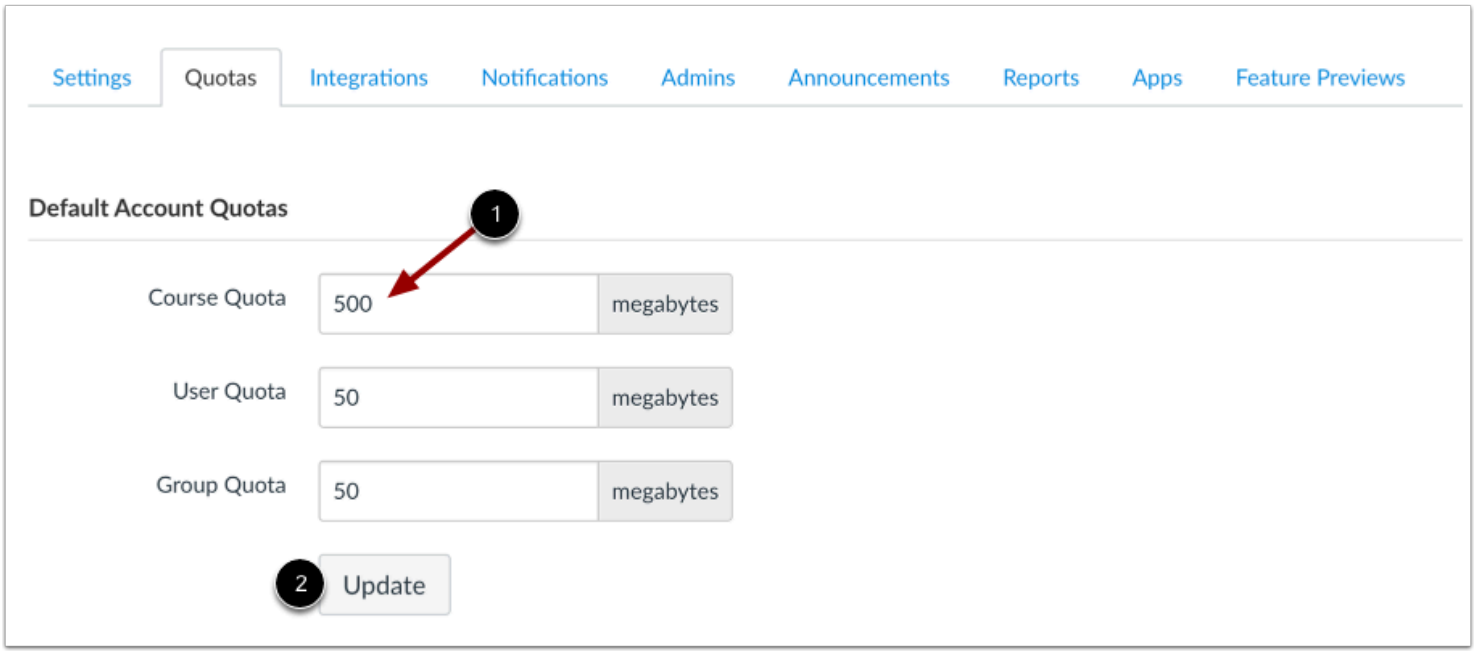
In Account Navigation, click the **Settings** link.

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].

Note: Sub-account admins cannot manage user quotas.

Find Manually Settable Quotas

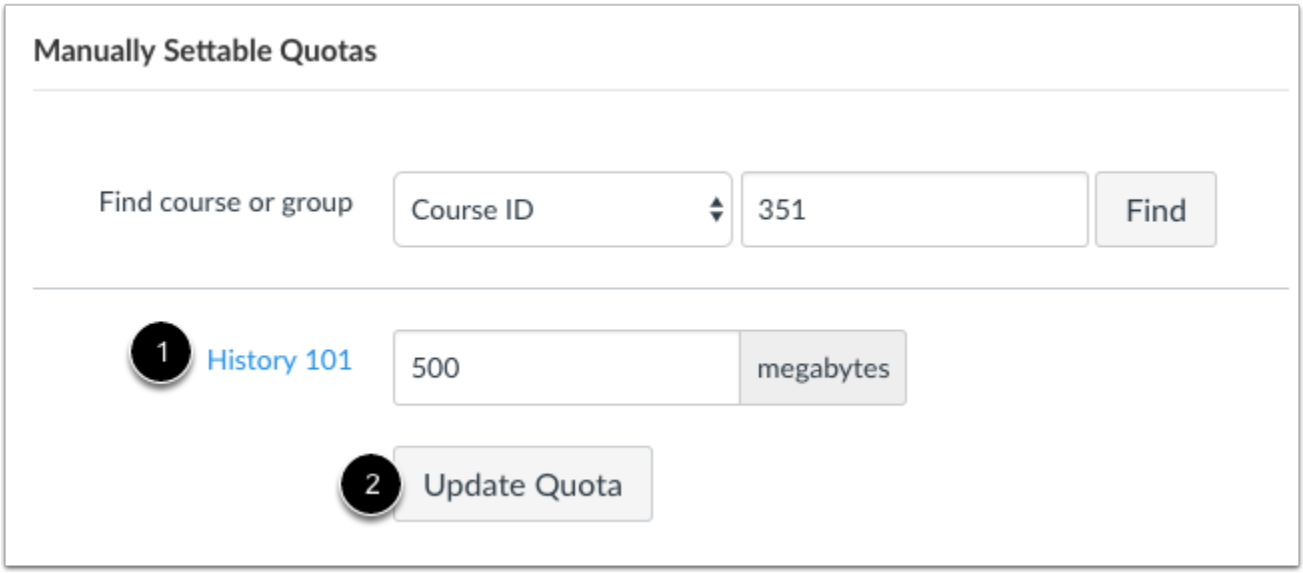


In the Manually Settable Quotas section, you can search for a course or group with a specific quota. In the ID field [1], select Course ID or Group ID. In the text field [2], enter the ID of the course or group. Click the **Find** button [3].

Notes:

- 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**).
- Manually Settable Quotas at parent level only apply to its own sub-accounts/courses.

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 allow you to contact all or specific users within an account or sub-account 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. You can create five different types of global announcements: warning, error, information, question, or calendar.

Global announcements are shown from all accounts associated with a user and display in the user's Dashboard. If you select the option to send a notification, users who have enabled the Global Announcement notification preference can also receive alerts for global announcements via their preferred notification type.

If a user has an account with multiple institutions, the user can view multiple announcements. The announcement indicates which account or sub-account sent the global announcement.

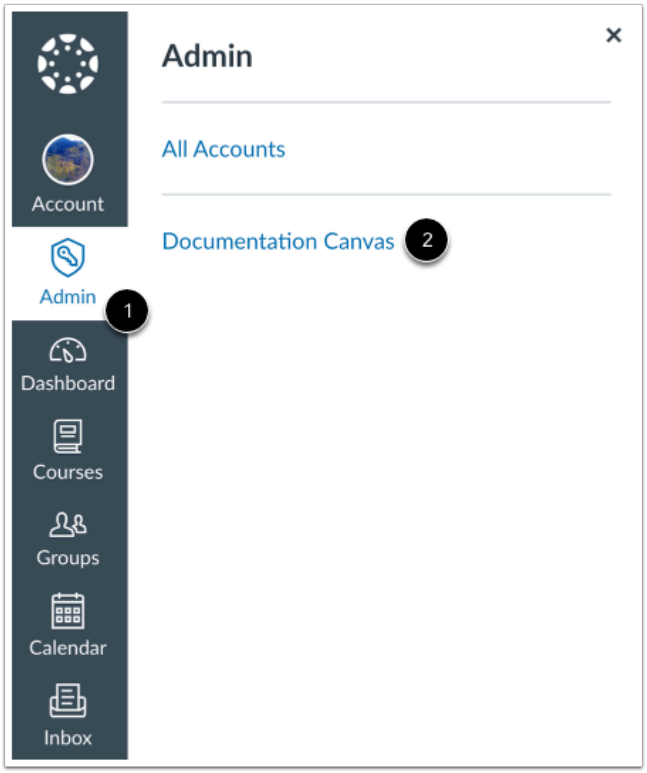
Global announcements can be shown during a specific date range. Once an announcement passes its start date, the announcement is immediately visible in each user's dashboard and can be dismissed by the user.

If necessary, you can also edit the text in a global announcement. You can also edit the announcement start and end dates until the saved start or end date.

Notes:

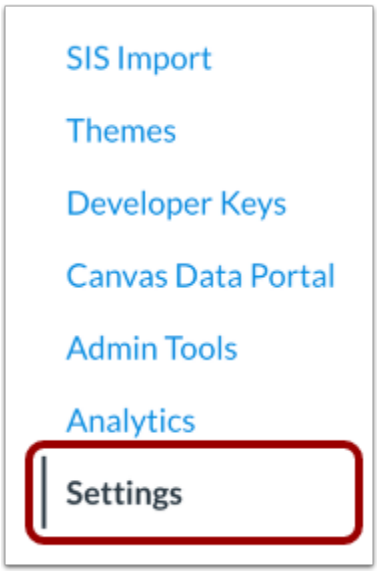
- Global announcements and notifications are only sent to users with active enrollments in the current term.
- When users are not enrolled in any courses, they can view announcements from the root account. They can only view sub-account announcements once they have been added to a course within the sub-account. Courses do not have to be published for users to view sub-account announcements.
- The Theme Editor primary color is associated with information, question, and calendar announcements. However, warning and error colors cannot be changed.
- Any edits made to an existing Global Announcement after its start date will not force the message to reappear for users who have already dismissed it. Any substantial changes to the global announcement should be created as a new Global Announcement so that it reappears for all users.
- Global announcements are not displayed to users with manually concluded and inactive enrollments.
- Global announcements display in chronological order, with the newest announcement shown at the top of the page.

Open Account



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

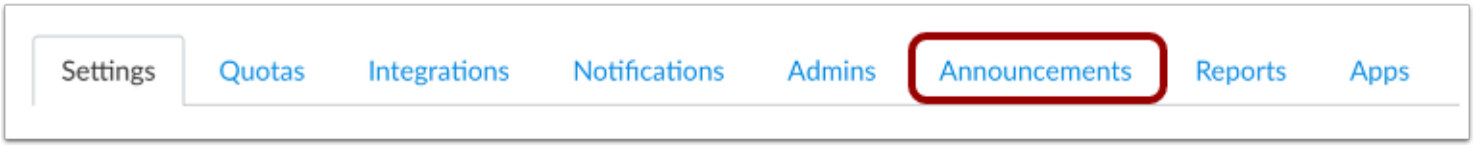
Open Settings



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

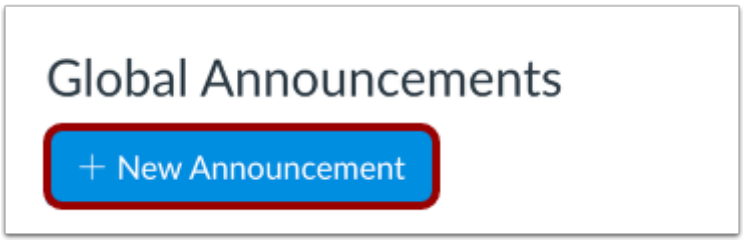
Note: To make an announcement in a sub-account, click the **Sub-Accounts** link, select a sub-account, then click the sub-account's **Settings** link.

Open Announcements Tab



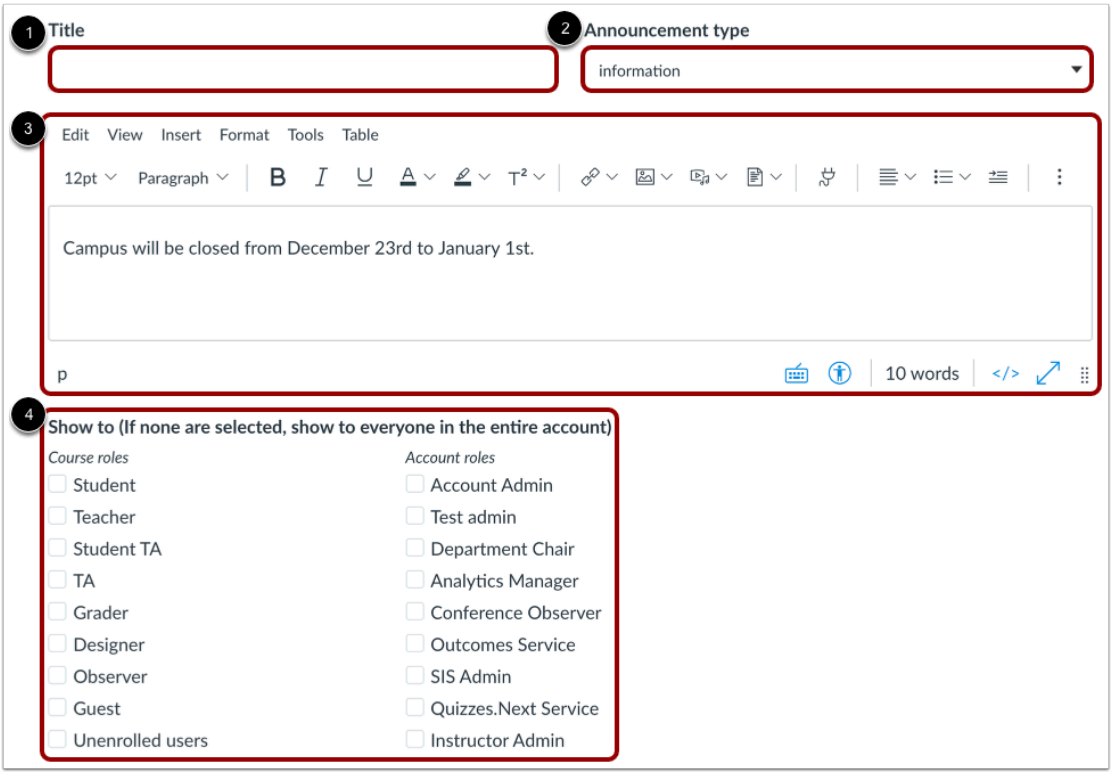
Click the **Announcements** tab.

Add 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 **Show to** section [4], select the roles of users who should see the announcement. You can select both course and account roles. Selecting a role will send a notification to every user who has that role in any course. If no roles are selected, the announcement will display for everyone with a course in the originating account or sub-account.

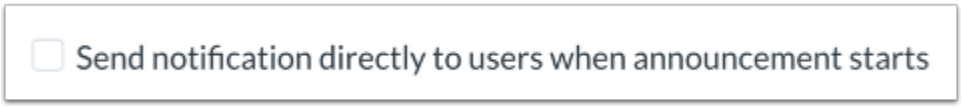
Note: If your institution is associated with a trust account, you can choose to only show the announcement to users within the current domain.

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).

Send Announcement Notification



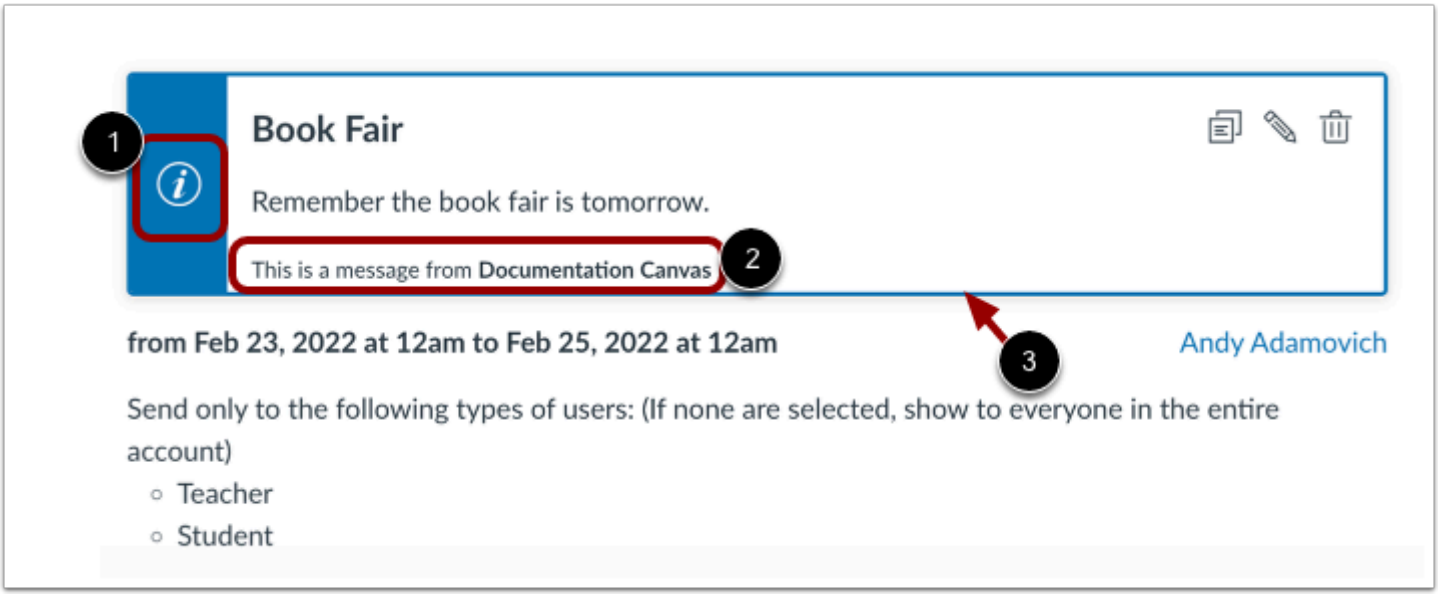
To send a notification directly to users when the announcement starts, click the **Send notification directly to users when announcement starts** checkbox. Users who have enabled the Global Announcement notification preference will receive a notification when the announcement starts.

Publish Announcement



Click the **Publish Announcement** button.

View Global Announcement

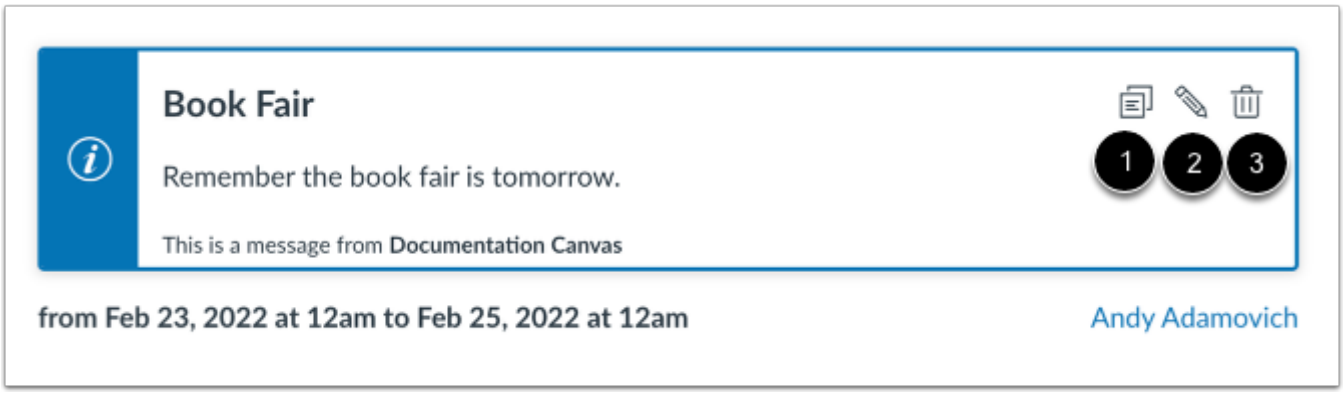


View the global announcement. Announcements include an icon [1], the name of your account or sub-account [2], and a border [3].

Announcement icons and border color depend on the announcement type:

- **Warnings** include an exclamation mark icon and an orange border.
- **Errors** include an exclamation mark icon and a red border.
- **Information** announcements include an information icon and a border in the primary color selected in your account's Theme Editor.
- **Question** announcements include a question mark icon and a border in the primary color selected in your account's Theme Editor.
- **Calendar** announcements include a calendar icon and a border in the primary color selected in your account's Theme Editor.

Manage Announcement



To copy a global announcement, click the **Duplicate** icon [1]. Edit the announcement details. Then publish the announcement.

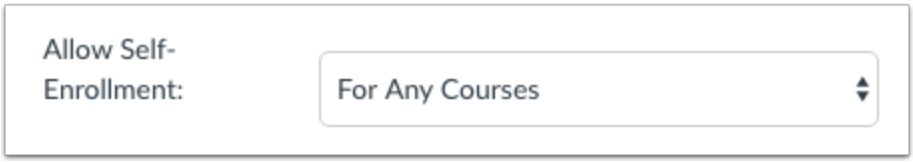
To edit a global announcement, click the **Edit** icon [2]. Edit the announcement details. Then save the changes.

To delete a global announcement, click the **Delete** icon [3]. Then confirm that you want to delete the announcement.

What user enrollment and registration options are available in Canvas?

As an account admin, you can set different enrollment and registration options for your account. Available options include self enrollment, self registration, and open registration.

Self Enrollment

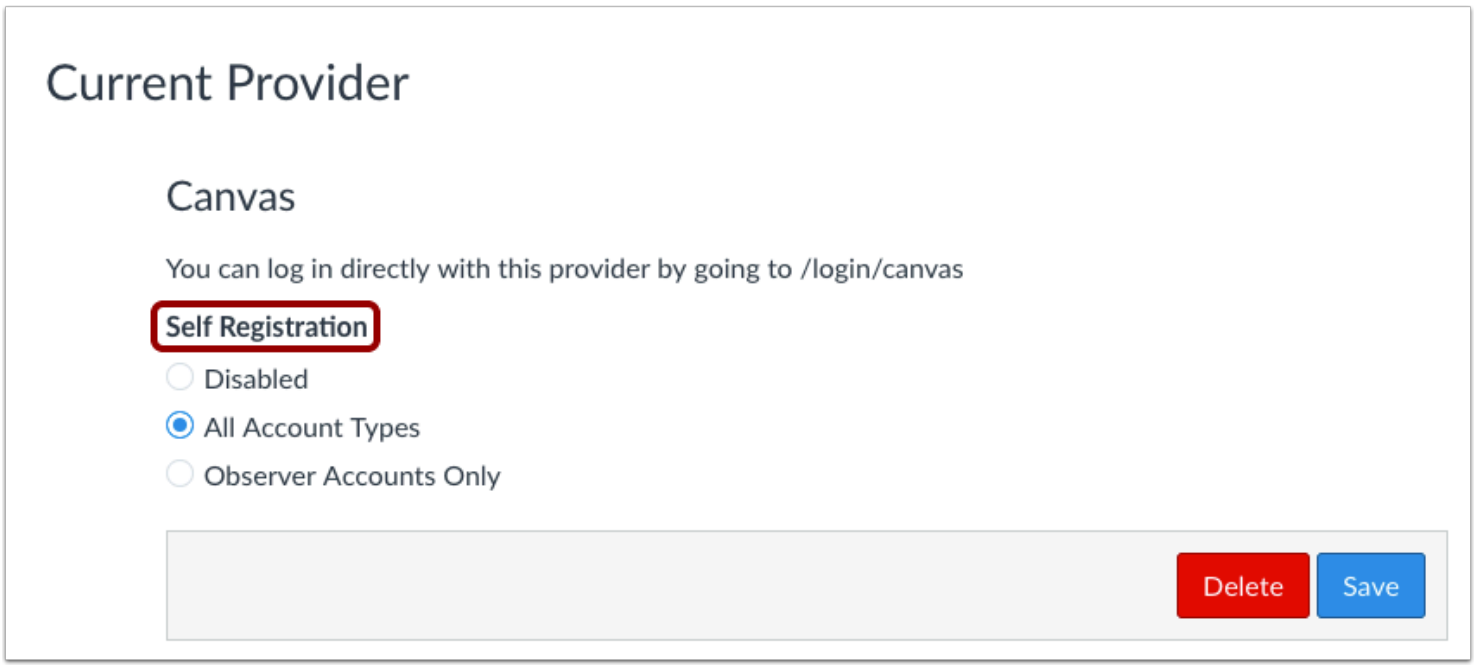


Self-enrollment is an open enrollment method that allows students to use a secret URL or code to join a course. This option requires students to have an existing Canvas account—most institutions automatically create Canvas accounts for each student through SIS import.

If you enable self enrollment for an account, instructors can allow self-enrollment for their course in Course Settings to generate the secret URL or code to send to students.

Instructors can also add a link to the course home page for students to join the course at any time. This option also works well for courses added to the Public Course Index.

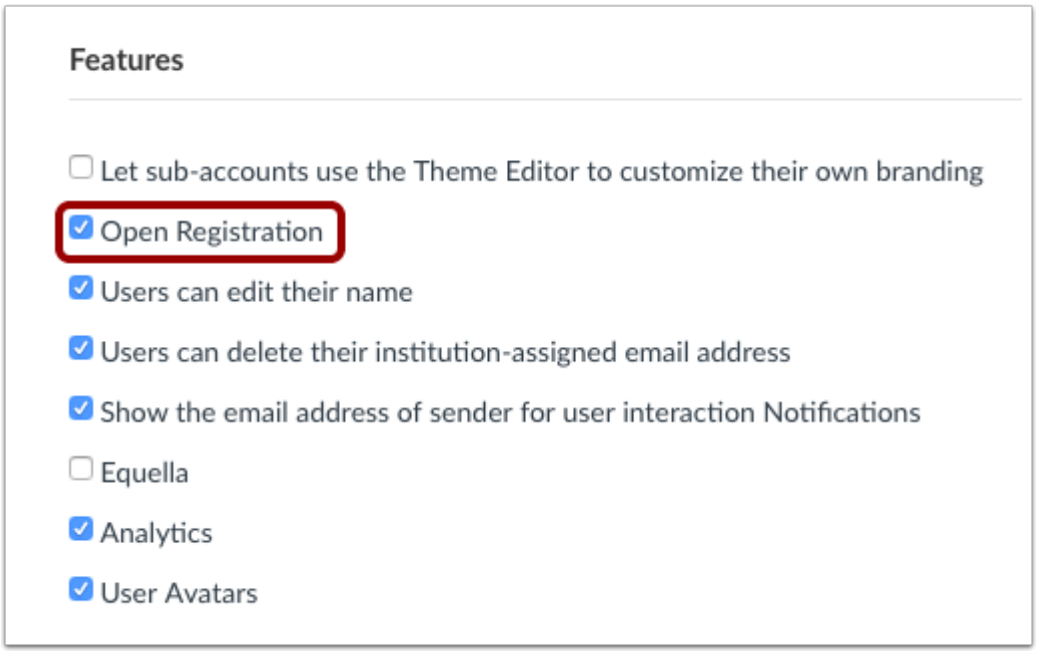
Self Registration



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

If you enable self registration but students do not have a Canvas account, self registration allows them to create their own account to log in to Canvas and join the course.

Open Registration



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

You can enable open registration in your account settings.

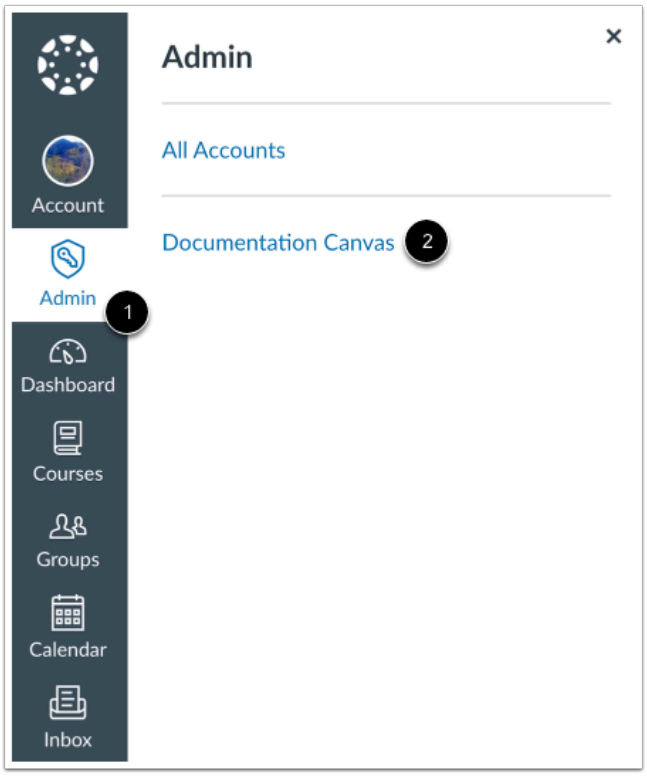
How do I enable open registration in an account and allow instructors to add users to a course without Canvas accounts?

As an admin, you can enable Open Registration for your entire account. Open registration allows instructors with the appropriate permissions to add users to a course, even if the users don't already have Canvas accounts. When an instructor adds a user to a course, the user is sent a course invitation. To join the course, the user must first register with Canvas and create a password. The user's account will then display in the account Users list.

Even with Open Registration disabled, admins with the Modify Login Details permission can always create accounts and add users to courses, even if they don't have Canvas accounts.

Once this feature is enabled, instructors can add users in the course People page.

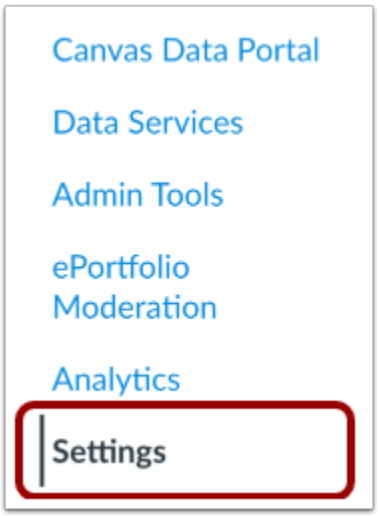
Open Account



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

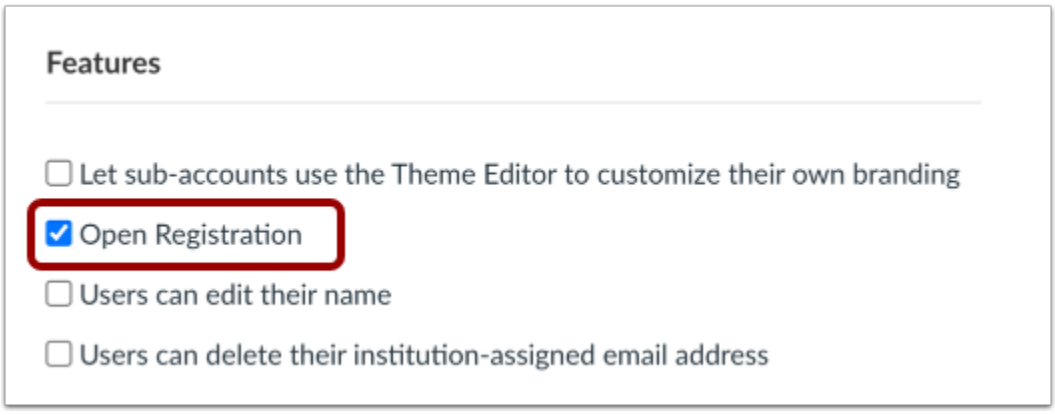
Open Account

Open Settings



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

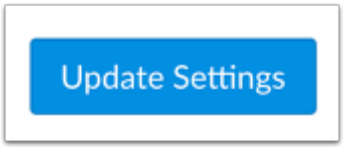
Change Open Registration



In the Settings tab under the Features heading, click the **Open Registration** checkbox**.**

Note: By default, this option is turned off.

Update Settings



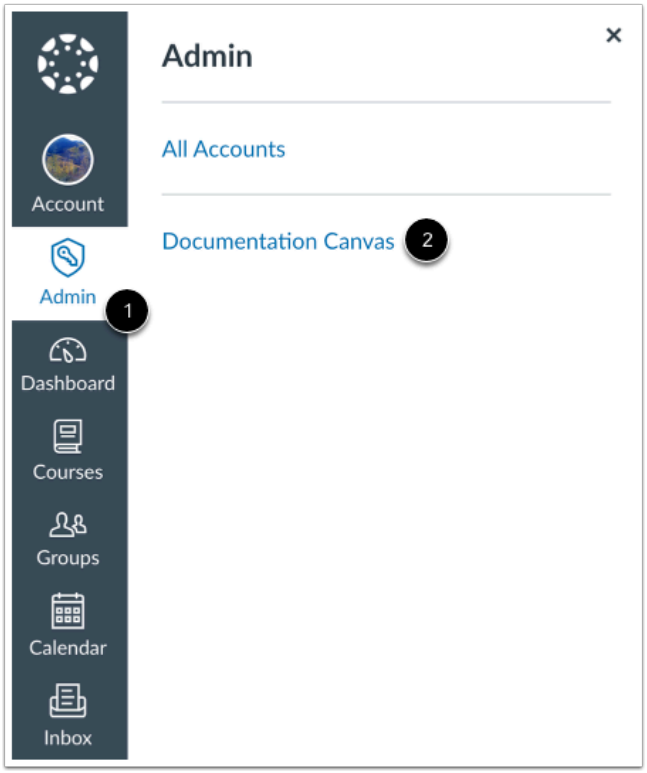
Click the **Update Settings** button.

How do I enable self-enrollment in an account and allow students to self-enroll in a course?

Self-enrollment can be enabled in account settings. Enabling self-enrollment give instructors the ability to allow students to use a join code or click a button to enroll themselves in a course. By default, self-enrollment is disabled for the account.

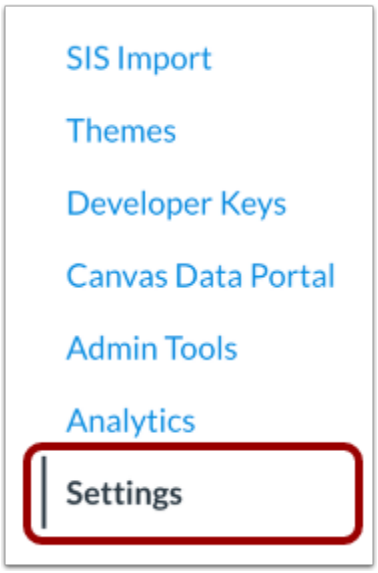
Once this feature is enabled, instructors can enable self-enrollment in Course Settings.

Open Account



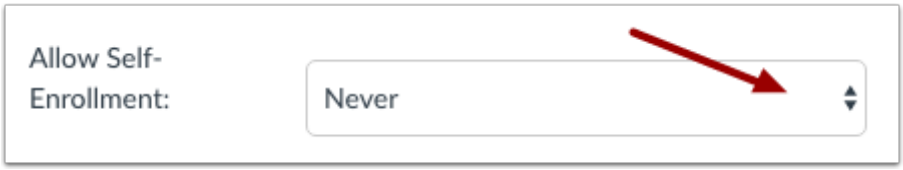
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Settings



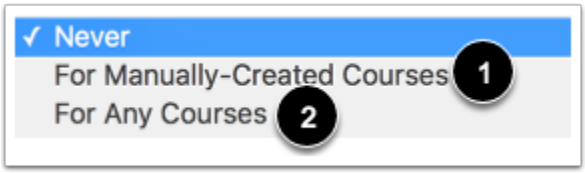
In Account Settings, click the **Settings** link.

Allow Self-Enrollment



In the Settings tab, locate the Allow Self-Enrollment drop-down menu.

Set Self-Enrollment

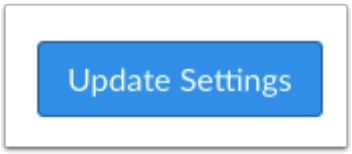


Select the type of self-enrollment permission you want to enable.

To enable courses that aren't linked to any SIS data or affected by SIS imports, click the **For Manually-Created Courses** option [1].

To enable any type of course, whether manually-created or created using the SIS Import tool, click the **For Any Courses** option [2].

Update Settings



Click the **Update Settings** button.

How do I change the sender name in account email notifications?

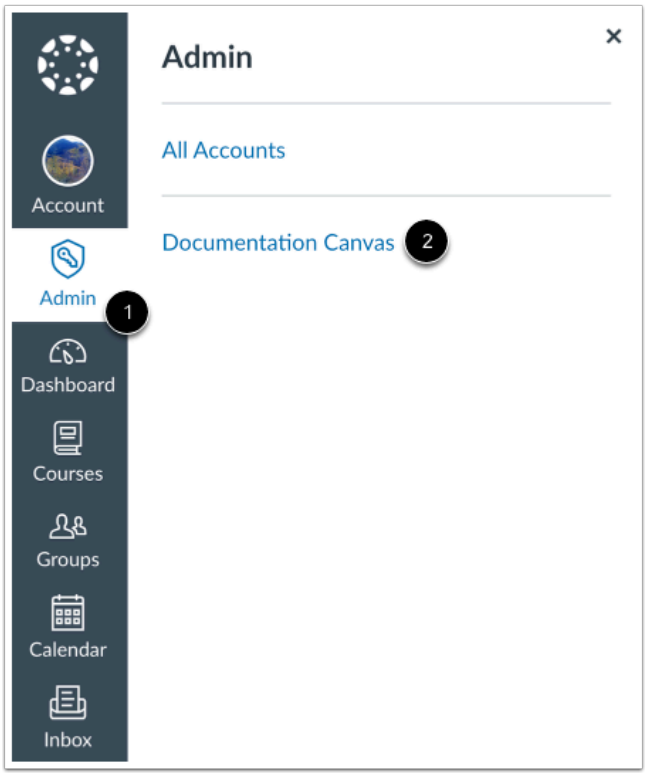
Canvas gives administrators the option to set up a custom sender name for Canvas notifications. This custom text can be your institution name or whatever sender information you would like to use. Using the custom text field helps students identify account notification emails more easily and improves the quality of student-instructor interaction.

Setting a custom sender name does not affect course notifications, which are always sent as the name of the course. However, daily and weekly course summaries (which can mention multiple courses) are sent as an account notification.

If no custom name is set, Canvas uses the account default.

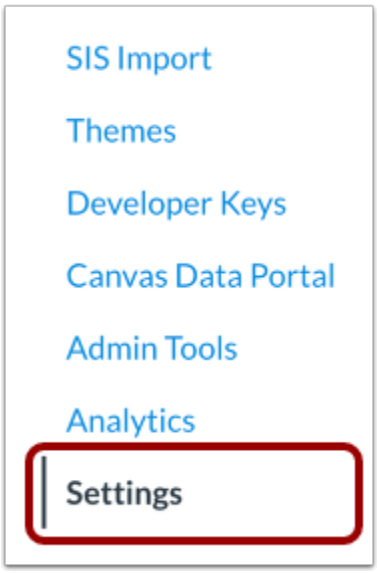
Note: Sub-account admins cannot change the sender name in account email notifications.

Open Account



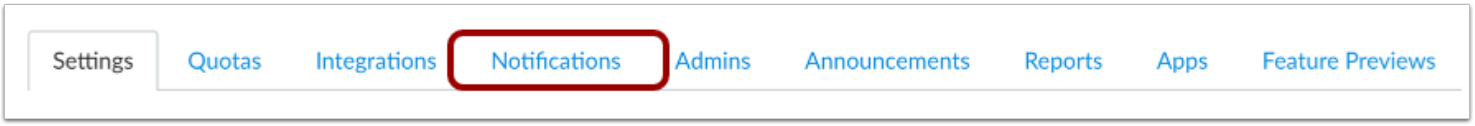
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Settings



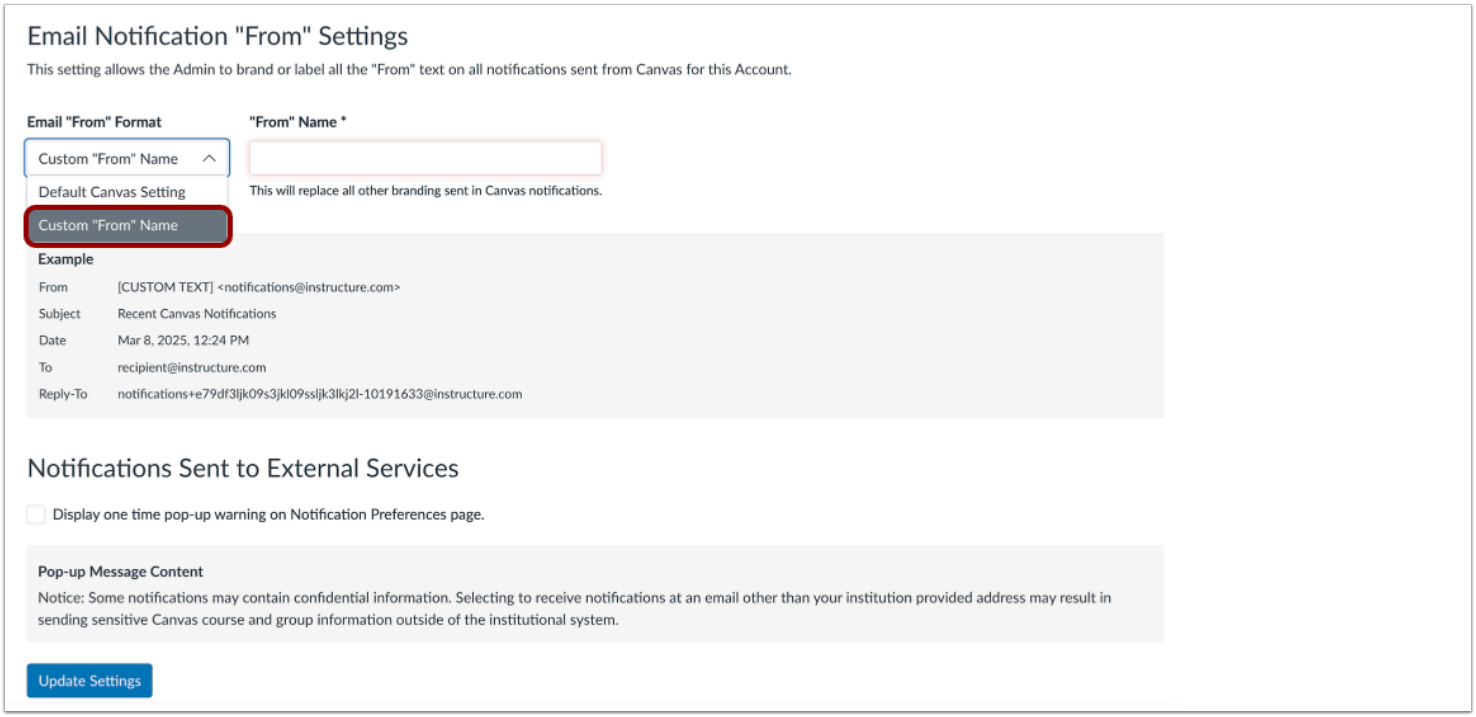
In Account Navigation, click the **Settings** link.

Open Notifications



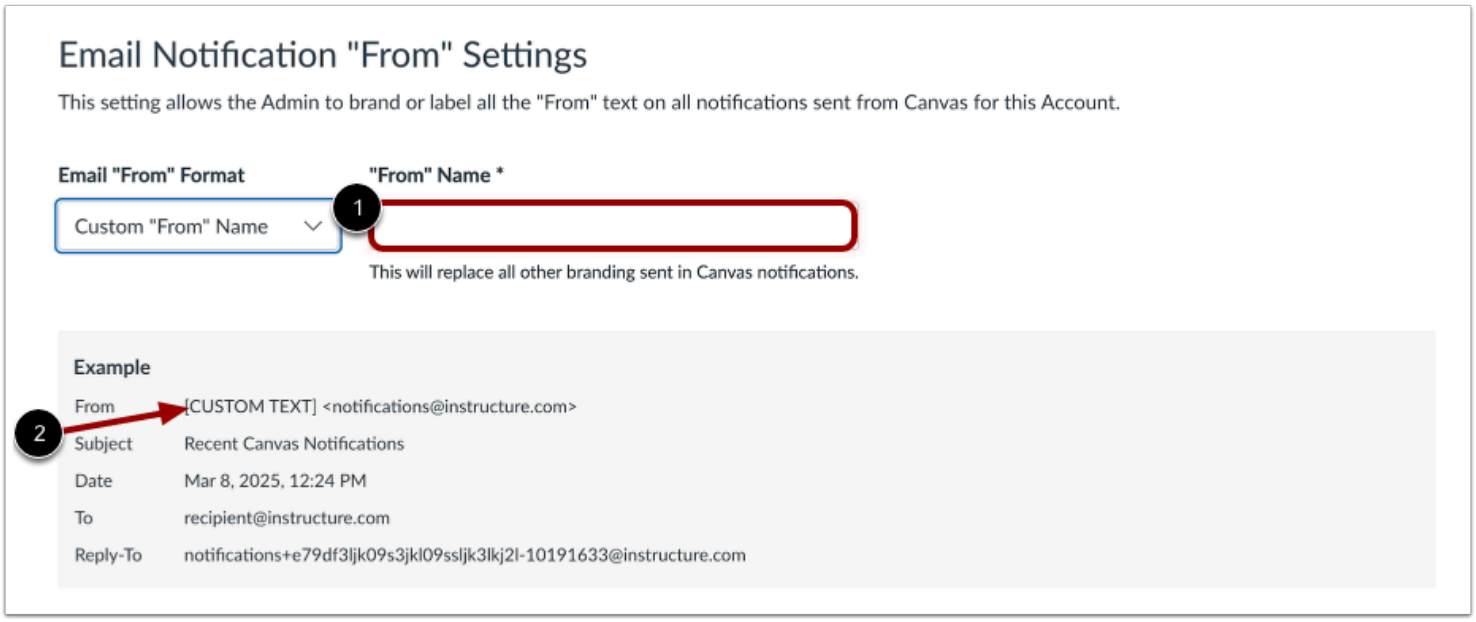
Click the **Notifications** tab.

Select Custom "From" Name



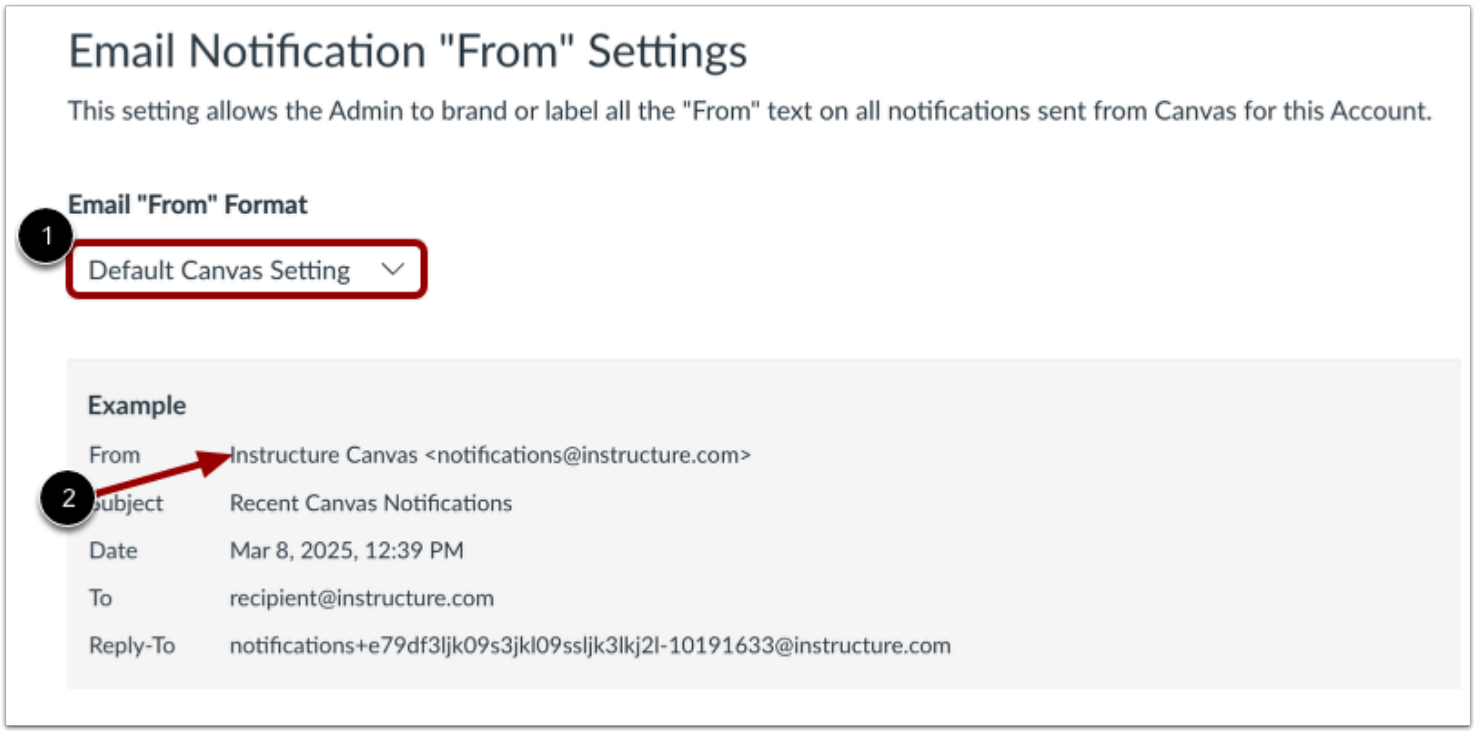
In the Email "From" Format drop-down menu, select Custom "From" Name option.

Change Custom "From" Name



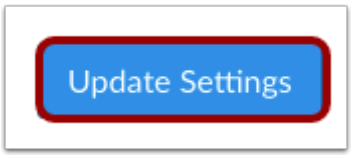
Type your preferred name into the **Custom "From" Name** field [1]. Verify the example of the name as it will display in the "from" field of the email notification [2].

Select Default Canvas Setting



If you do not want to have a Custom "From" Name, select the Default Canvas Setting option [1]. The "From" name will display as Instructure Canvas [2].

Update Settings



Click the **Update Settings** button.

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

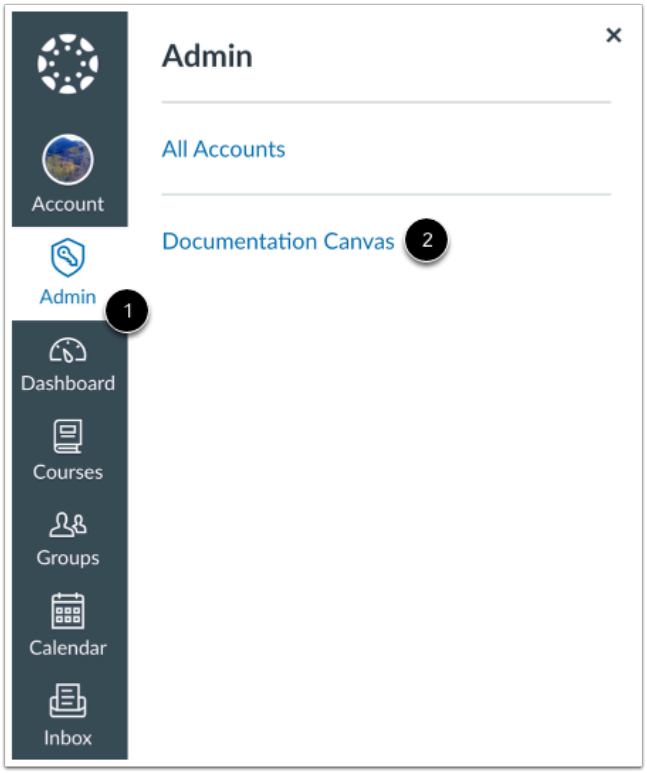
When you integrate a student information system (SIS) in Canvas, In courses, only assignments are automatically configured to send grades to the SIS; graded discussions and quizzes have to be configured on a case-by-case basis. However, at the account level, you can configure all assignment types to be sent to your SIS automatically.

Even after setting all assignments to be sent to the SIS, instructors can still manage assignments in their courses and manually remove individual assignments, graded discussions, or quizzes that they do not want to send to your SIS. Assignments can be managed from the Assignments page and Quizzes page, or they can be managed when creating an SIS assignment, SIS graded discussion, or SIS quiz.

Notes:

- Student information systems must be configured by your Customer Success Manager.
- If the New SIS Integration Settings feature option has also been enabled, you must enable SIS submissions through SIS Integration Settings.
- Learn more about feature previews in the account features lesson.

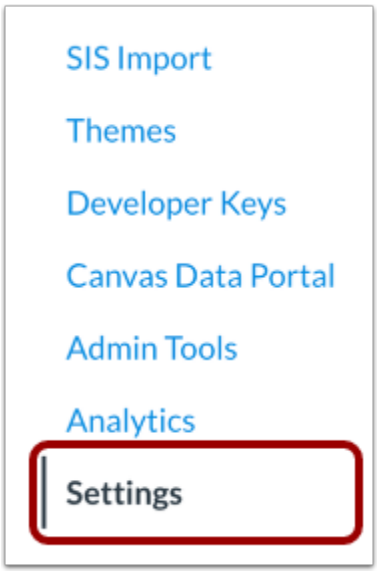
Open Account



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

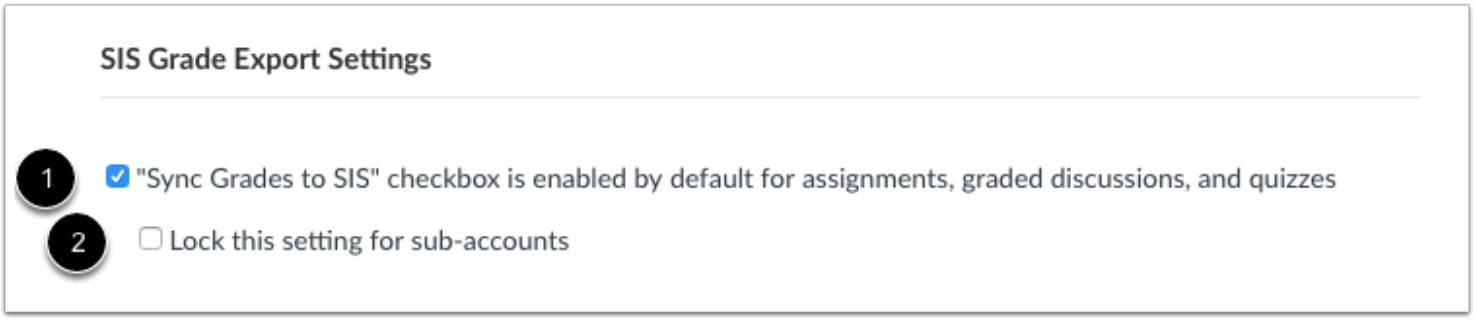
Open Account

Open Settings



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

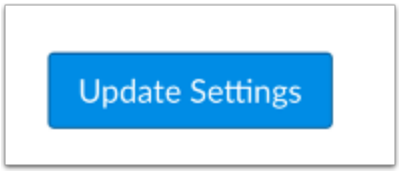
Configure SIS Grade Export Settings



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 **Sync 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].

Update Settings



Click the **Update Settings** button.

How do I manage student information system (SIS) integration settings for an account?

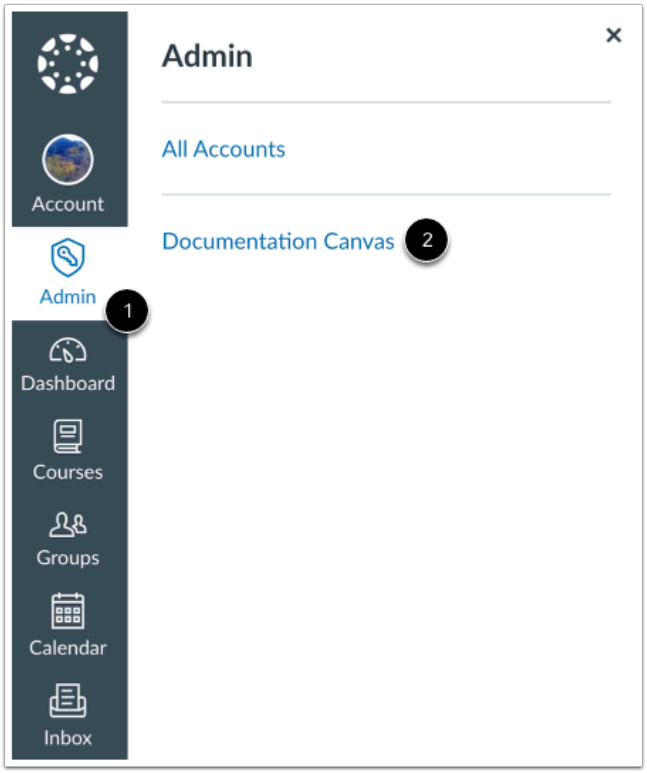
When you integrate a student information system (SIS) in Canvas, you can manage SIS validations and assignment sync settings for all subaccounts and courses.

Even after setting all assignments to be sent to the SIS, instructors can still manage assignments in their courses and manually remove individual assignments, graded discussions, or quizzes that they do not want to send to your SIS. Assignments can be managed from the Assignments page and Quizzes page, or they can be managed when creating an SIS assignment, SIS graded discussion, or SIS quiz. However, if any sync validations have been set, instructors must adapt their assignments to the validation settings.

Notes:

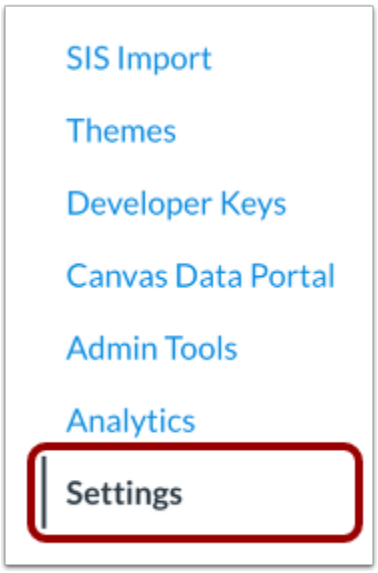
- Student information systems must be configured by your Customer Success Manager.
- This feature is only available if the New SIS Integration Settings feature option has been enabled for your account. **Please note that the settings will not display unless the feature option has been set to Enabled.** If the SIS Integration Settings feature option has not been enabled, you may still be able to enable SIS submissions in Account Settings.
- Learn more about feature previews in the account features lesson.

Open Account



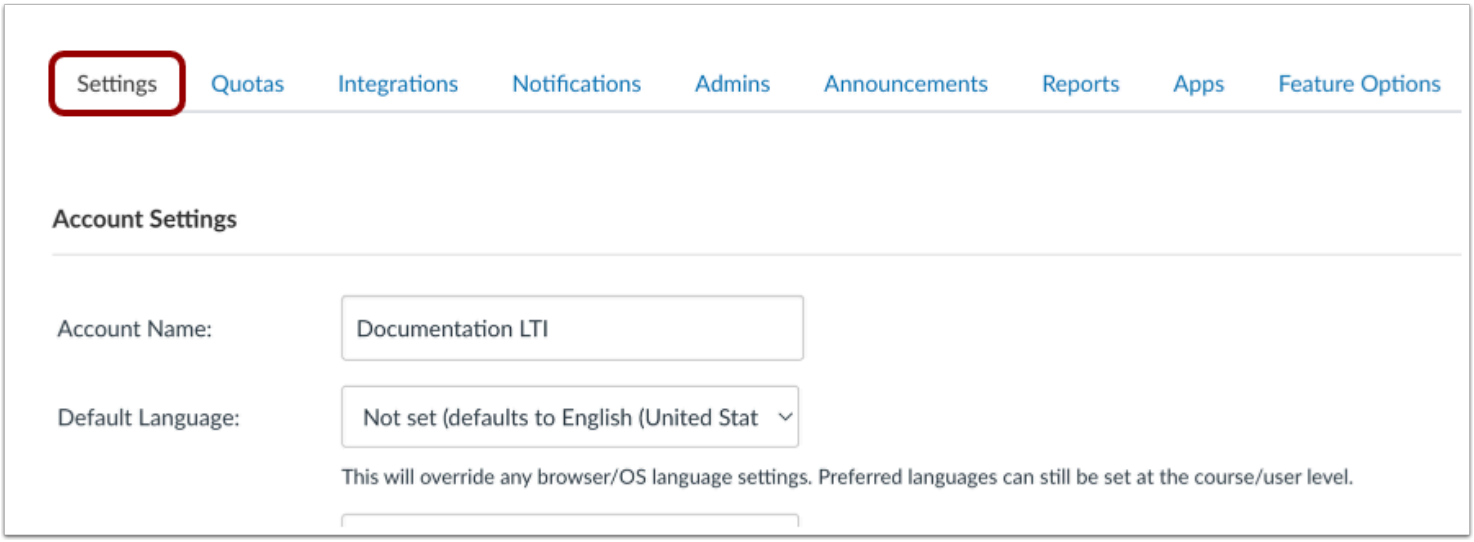
Click the **Admin** link [1], then click the name of the account [2].

Open Settings



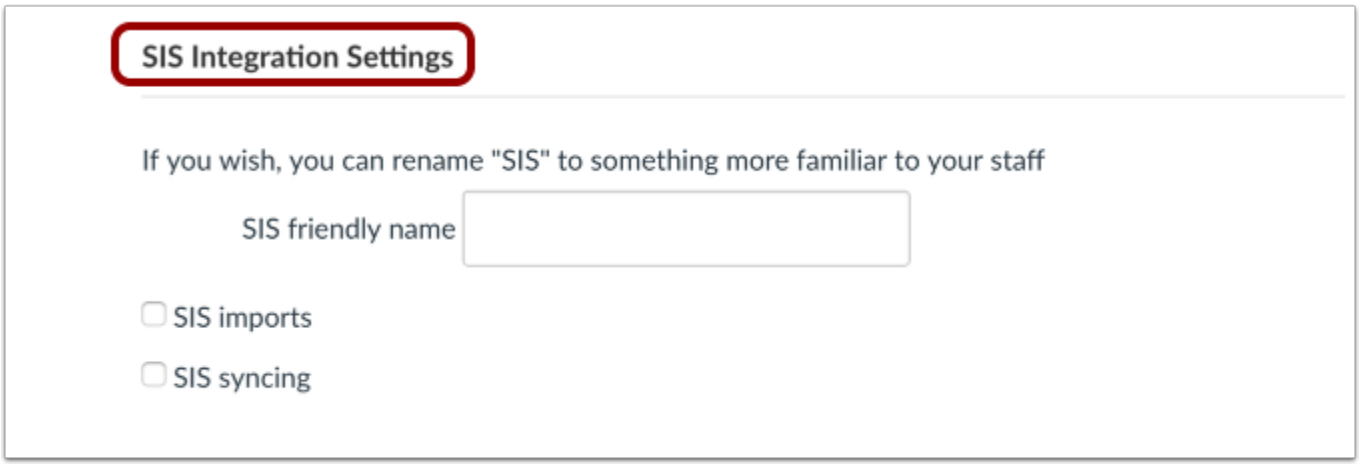
In Account Navigation, click the **Settings** link.

View Settings



View the Account Settings tab.

View SIS Integration Settings



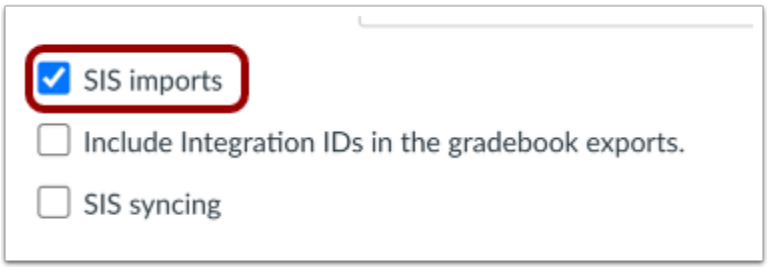
In the Account Settings tab, locate the SIS Integration Settings section.

Set SIS Friendly Name



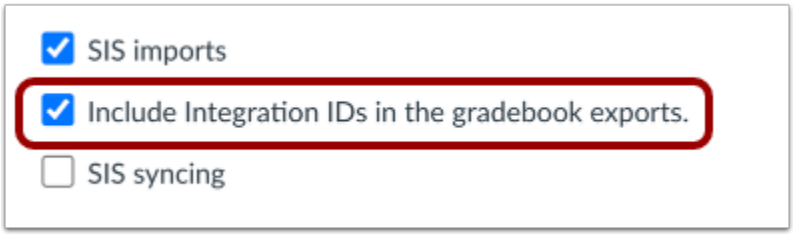
If you want to show the name of your SIS provider in Canvas courses, enter the name in the SIS friendly name field. The name displays in the SIS checkbox in Canvas assignments, graded discussions, and quizzes. This option is helpful for instructors who may not know what an SIS is, but who may be familiar with a setting identified with the SIS name (e.g., PowerSchool).

Enable SIS Imports



If you want to allow users with SIS permissions to import CSV files from your student information system, click the **SIS Imports** checkbox.

Include Integration IDs



Upon request, your Customer Success Manager can allow you to include Integration IDs in gradebook exports. Integration IDs are secondary unique identifiers useful for more complex SIS integrations and required by some institutions. To generate the Grade Export report with an Integration ID column and to allow gradebook exports to also include an Integration ID column, click the **Include Integration IDs in the gradebook** exports checkbox.

Enable SIS Syncing

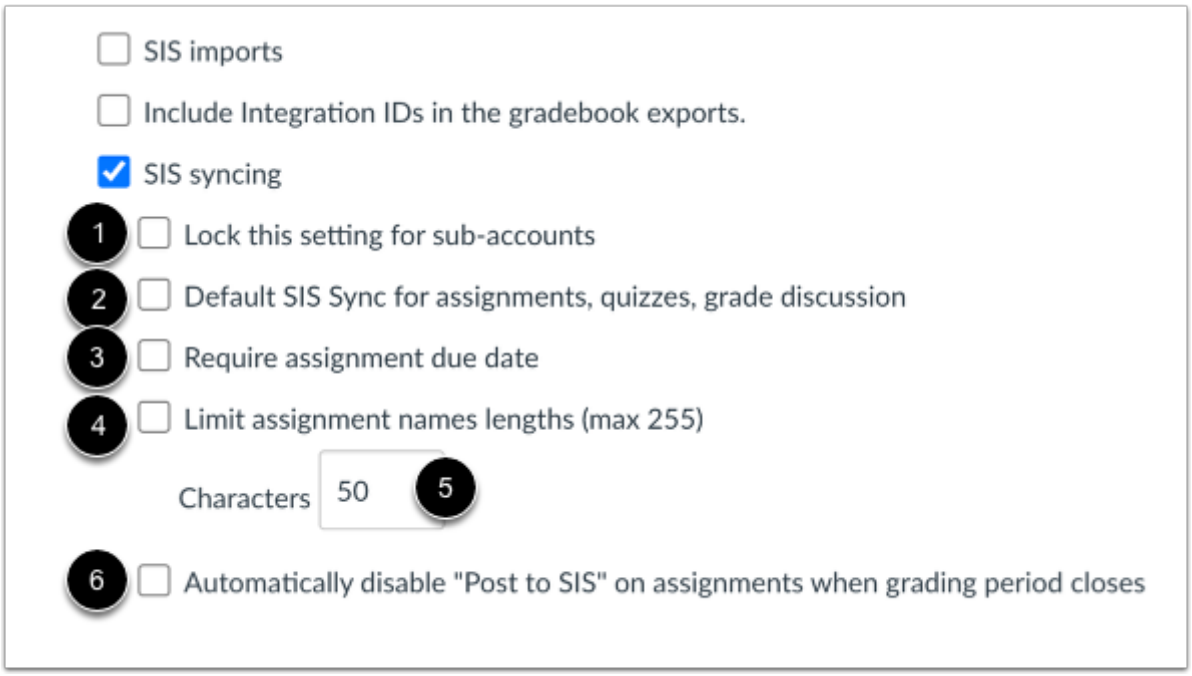


If you want to enable SIS syncing, click the **SIS Syncing** checkbox. This setting manages all workflows associated with sending SIS data back to your SIS provider.

View SIS Syncing Settings

You can enable four workflow settings with SIS Syncing. These settings set defaults for all assignments throughout all courses; however, course instructors ultimately manage which assignments are synced by selecting the Sync to SIS option in a graded assignment or the Sync to SIS toggle option in the Assignment Index Page.

Note: Currently this setting does not support syncing a final or midterm grade, which will be added in a future release.



Lock this setting for sub-accounts [1]: This setting locks all selected SIS Sync settings for subaccounts. Subaccount admins cannot change any SIS settings.

Default SIS Sync for assignments, quizzes, grade discussion [2]: This setting displays the SIS Friendly Name in the Sync to [SIS] checkbox in Canvas assignments, graded discussions, and quizzes. All graded assignments, graded discussions, and graded quizzes will be enabled to be passed back to the SIS by default. (In quizzes, this setting does not apply to practice quizzes and surveys.) The name of the SIS also displays in the checkbox when you are creating an assignment shell in the Assignments page.

Require assignment due date [3]: This setting requires all assignments, graded discussions, and quizzes to include a due date. In a course, if a due date is not included in a graded assignment, Canvas asks the user to add a due date. The assignment cannot be saved until the due date error is resolved or the Sync to SIS option is disabled for the assignment.

Due date validation is based on the assignment setup:

- If the assignment is assigned to Everyone, the due date is validated against the course date. If the course does not include a course override date, the assignment is validated against the term date.
- If the assignment is assigned to one or more sections, the due date is validated against the section date. If the section does not include a section override date, the assignment is validated against the course or term date.
- If the assignment is assigned to one or more students, *the assignment is currently not validated.*
- If the assignment is assigned to one or more students using MasteryPaths, *the assignment is currently not validated.*

Limit assignment names lengths (max 255) [4]: This setting limits the assignment name to a specific number of characters, which should be based on the SIS provider's length limit, if any. Enter the maximum number of allowed characters in the **Characters** field [5]. In a course, if an assignment name exceeds the number of set characters, Canvas will notify the user that the assignment name is too long. The assignment cannot be saved until the name length error is resolved or the Sync to SIS option is disabled for the assignment.

Note: If no number limit is entered, Canvas defaults to the maximum of 255 characters, regardless of whether the checkbox is selected.

Automatically disable "Post to SIS" on assignments when grading period closes [6]: This setting disables the Sync to SIS option on assignments, quizzes, and graded discussions, preventing grades from syncing to the school's SIS when the grading period is closed.

Update Settings

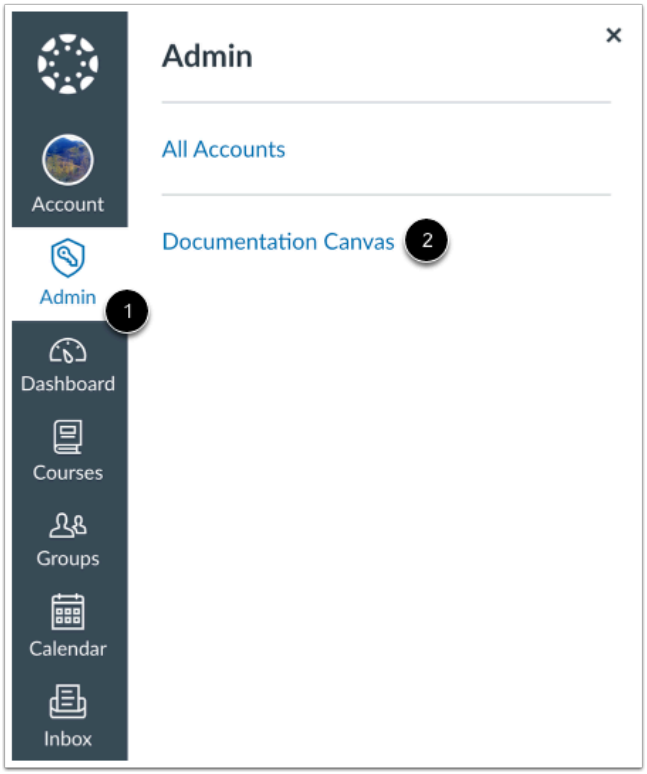


Click the **Update Settings** button.

How do I warn users in an account about using non-institutional email addresses for confidential information?

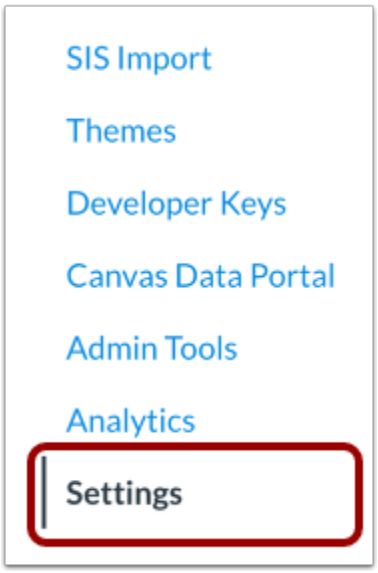
Administrators can enable a warning reminding all users about preferred email addresses for notifications. When enabled, the next time users at that institution visit the Notification Settings page, they will see a popup alerting them that adding a non-institution based email address may result in the exposure of sensitive content.

Open Account



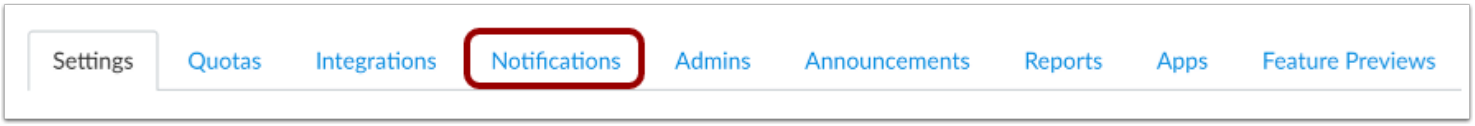
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Account Settings



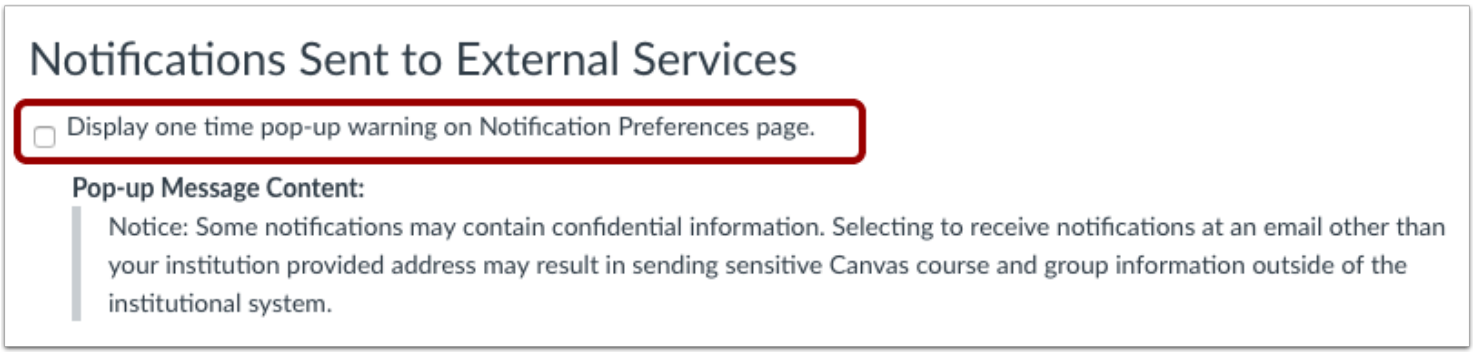
In Account Navigation, click the **Settings** link.

Open Notifications



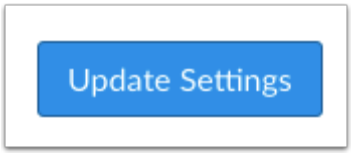
Click the **Notifications** tab.

Select Display Warning



Select the **Display one time pop-up warning on Notification Settings page** checkbox.

Update Settings



Click the **Update Settings** button.

How do I restrict student access before or after a course date at the account level?

As an admin, you can choose to set default restrictions for student access in your institution. These restrictions include student access to courses before or after the term or course participation dates. By default, course participation dates are limited to term dates. However, you as well as instructors at your institution can set specific participation dates for the course. For more information, view the interactive Student Course Visibility and Participation flowchart and Course Participation Access During and After Course Dates.

To manage student access, you can set the default value but allow instructors and sub-account admins to edit access for the course and sub-account levels as necessary, or you can set and lock the student access setting for the entire institution. The checkbox settings at the account level are passed to the sub-account and course levels as default values.

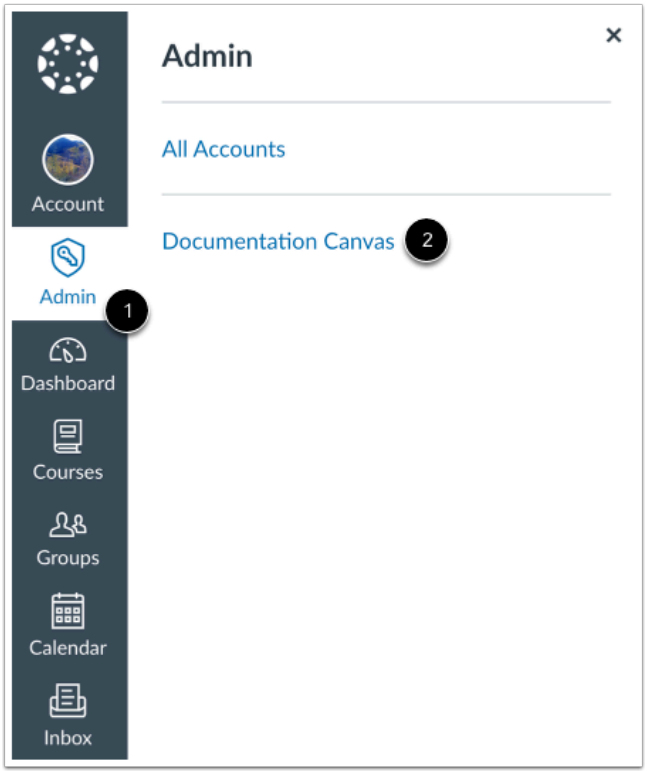
Restrict students from viewing course before start date: When a student enrolls in a future course, the course displays in the Future Enrollments section in the student Courses list. Once a course is published, the course displays an invitation to join the course, where the students can view course content at any time before the course begins. However, when the student restriction for the course participation 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: If the "Restrict view courses before the start date option" is enabled, the "Restrict students from viewing future courses in enrollments list" option displays and, if enabled, will completely remove future enrollments from the student Courses list. This setting can also be enabled to keep students from knowing they are enrolled in a course with a future participation start date.

Restrict students from viewing course after end date: Once a course has concluded, students can still view the course but all content is displayed in a read-only state. However, when the student restriction for the course end date is enabled, students can no longer view the course in the Courses list after the course has concluded. This setting can be used if your institution uses the course across multiple terms and want to restrict students from accessing prior content for future students, or if students have to re-enroll in the course.

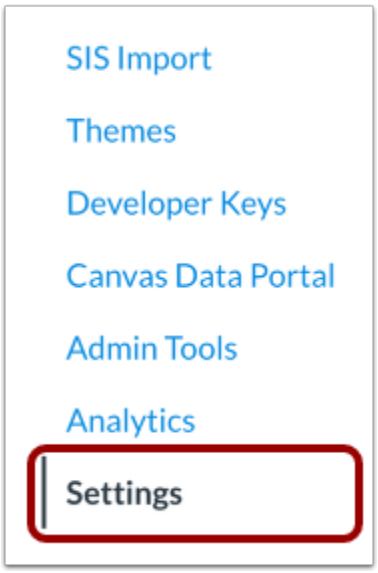
Note: Although any changed section dates override course dates, student access restrictions cannot be set at the section level, and restriction options apply to all sections within the course.

Open Account



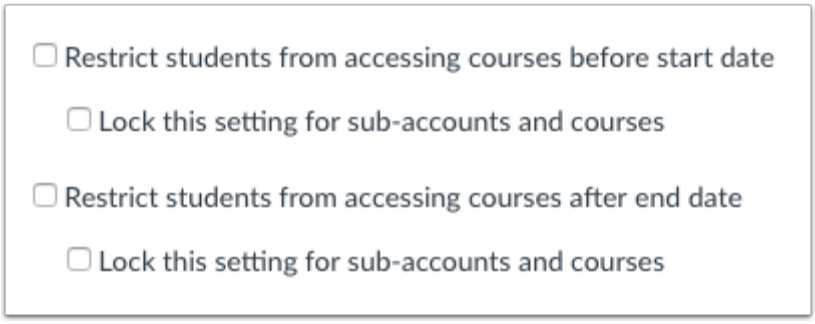
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Account Settings



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

View Restriction Options



In the Account Settings tab, locate the course restriction options.

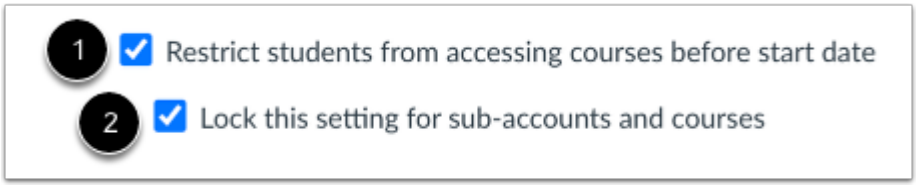
By default, student access checkboxes are not selected, meaning in all sub-accounts and courses students can view a link to any enrolled future course (after they accept their course invitation) or a concluded course. Additionally by default, the lock checkboxes are not selected, meaning sub-account admins and teachers can override this setting for a sub-account or course.

To retain these defaults 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.

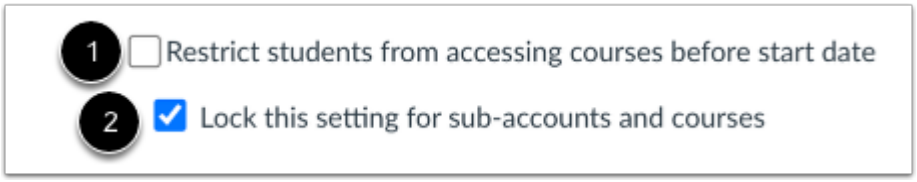
Restrict Students Before Start Date



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 accessing courses before start date** checkbox [1]. When selected, the course is inaccessible before the course start date. If course participation dates are set to follow term dates, the course start date applies the term start date.

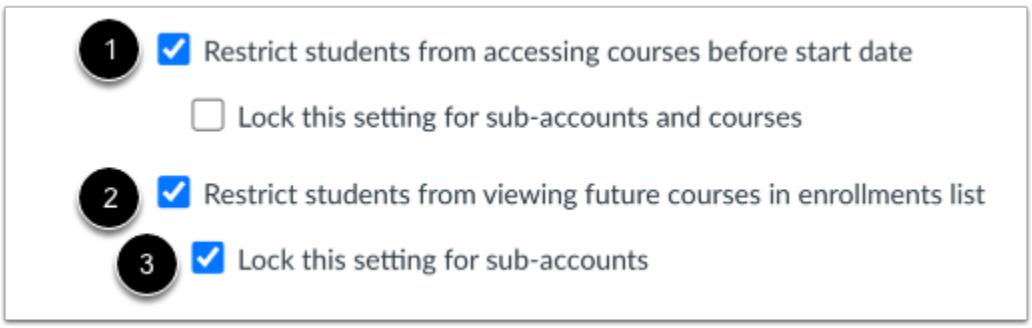
If you want to lock the default setting for sub-accounts and courses and apply the change immediately, click the **Lock this setting for sub-accounts and courses** checkbox [2].

Allow Student Access Before Start Date



To set a default for the entire account so that students can view a link to the course before the start date, do not select the **Restrict students from accessing courses before start date** checkbox [1], but select the **Lock this setting for sub-accounts and courses** checkbox [2].

Restrict Course in Enrollments List

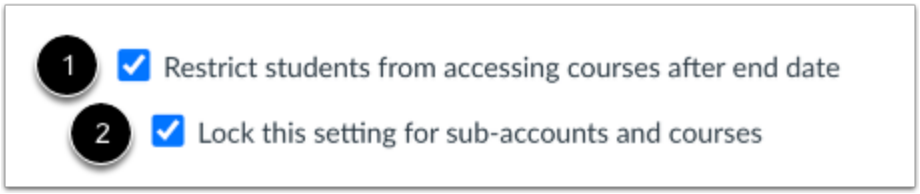


When you restrict students from accessing courses before the start date [1], you can also restrict students from viewing future courses in the Enrollments list.

If you don't want students to see they have been enrolled in a future course, select the **Restrict students from viewing future courses in enrollments list** checkbox [2].

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** [3].

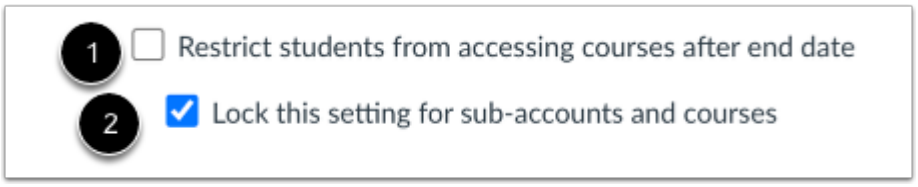
Restrict Students After End Date



To set a default for the entire account so that students cannot access the course after the course end date, click the **Restrict students from viewing courses after end date** checkbox [1]. When selected, the course is inaccessible after the course end date. If course participation dates are set to follow term dates, the course end date applies the term end date.

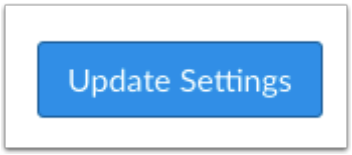
If you want to lock the default setting for sub-accounts and courses and apply the change immediately, click the **Lock this setting for sub-accounts and courses** checkbox [2].

Allow Student Access After End Date



To set a default for the entire account so that students can access the course after the course end date, do not select the **Restrict students from accessing courses after end date** checkbox [1], but select the **Lock this setting for sub-accounts and courses** checkbox [2].

Update Settings



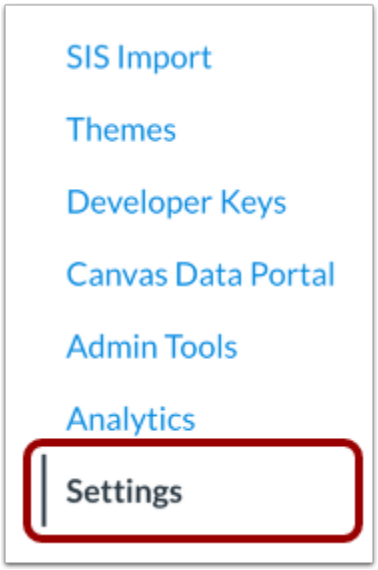
Click the **Update Settings** button.

How do I change the language preference in an account?

You can change the default language for your entire account. Canvas supports a variety of languages. This change will override any browser/OS language settings.

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

Open Settings



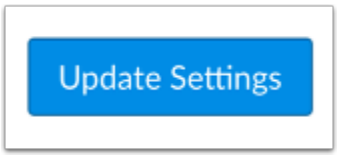
In Account Navigation, click the **Settings** link.

Select Language



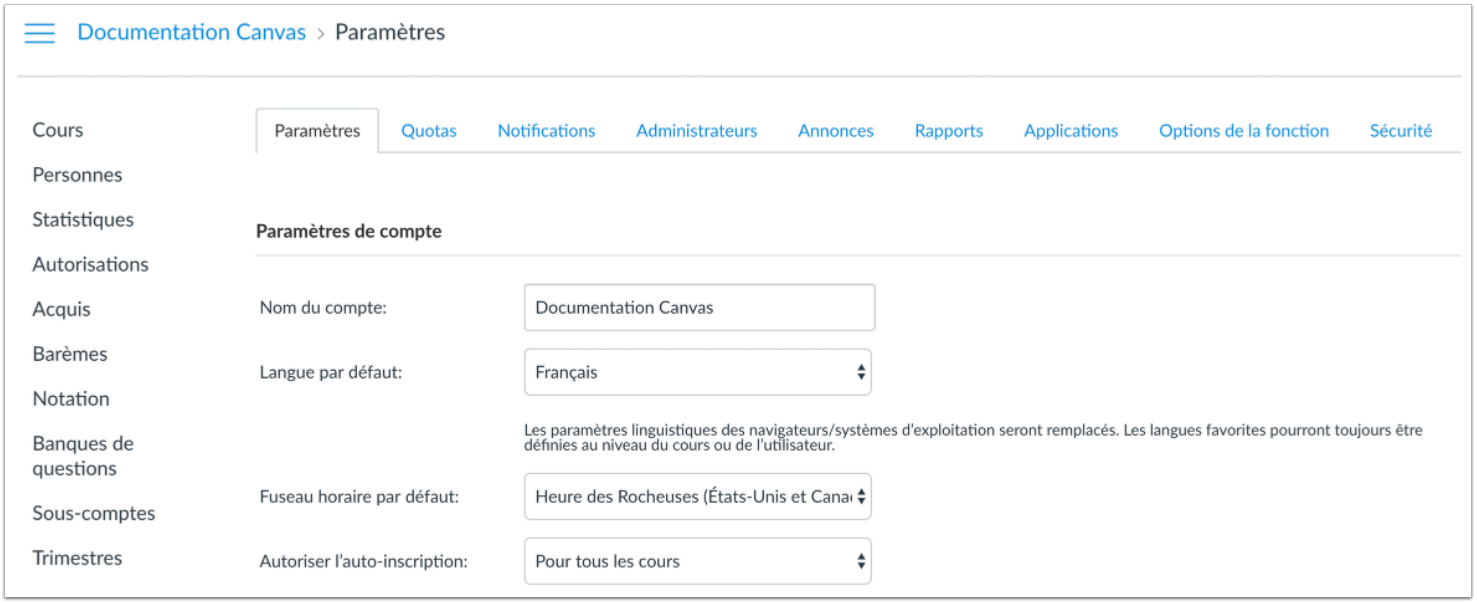
In the Settings tab, click the **Default Language** drop-down menu. Select the new default language.

Update Settings



Click the **Update Settings** button.

View in Default Language



View Canvas in the new default language for your account.

How do I restrict the viewing of quantitative data in an account?

When selected, the Restrict view of quantitative data setting allows instructors to limit the view of quantitative (numeric) grading data in a course. Students and observers only see qualitative data, which includes letter grades and comments.

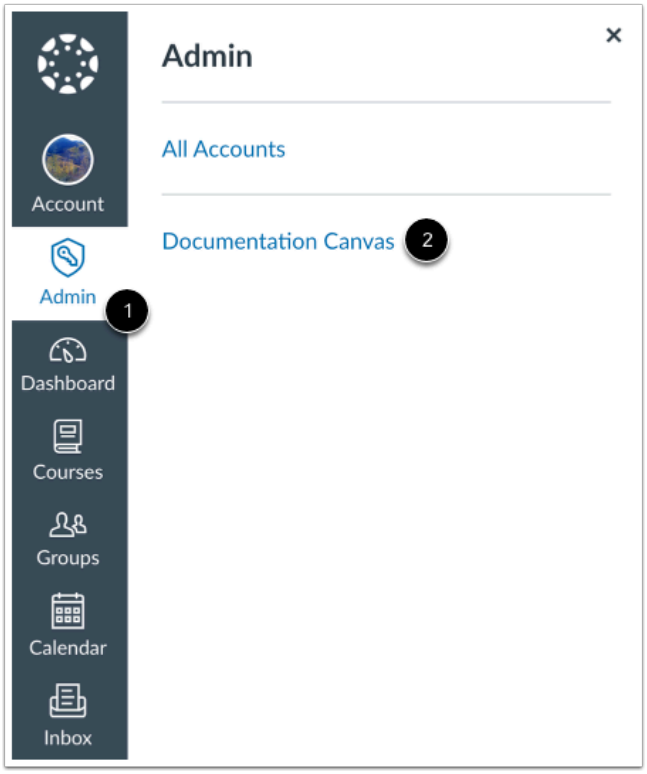
Points are converted to a letter grade and points possible are hidden. All other grading information is visible.

When locked, the setting restricts the view of quantitative data in all new courses.

Notes:

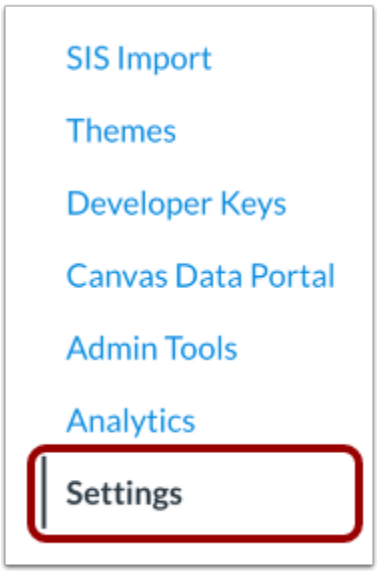
- You can enable and lock the setting for sub-accounts and courses. If the setting is unlocked, instructors can choose to enable it in Course Settings. If the setting is locked, instructors cannot disable the setting in a course.
- If the account or course does not have a custom grading scheme, the Default Canvas Grading Scheme is used.
- When the setting is enabled, Admins, Instructors, and TAs can still see quantitative data.

Open Account



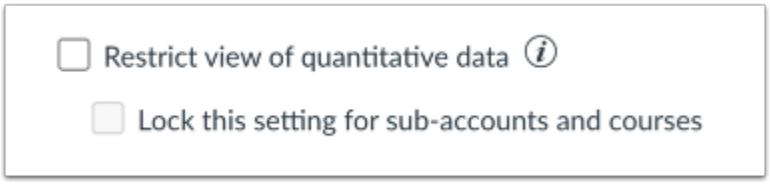
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Account Settings



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

View Restriction Options



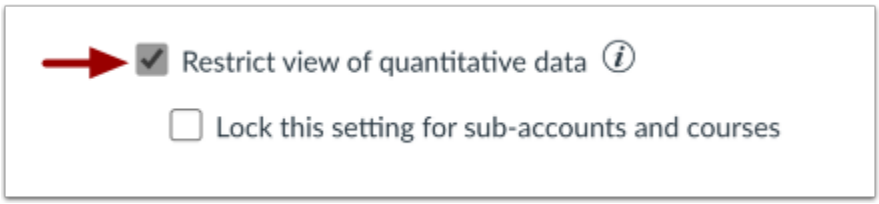
In the Account Settings tab, locate the **Restrict view of quantitative data** option.

By default, the Restrict view of quantitative data checkbox is not selected, meaning students and observers can view numeric data as well as letter grades and comments. Additionally, the option to restrict the view of quantitative data in a course is unavailable.

To retain this default for the entire institution, do not select the checkbox.

Note: The quantitative data restriction checkbox is for *all new courses* created in the account after the setting is enabled.

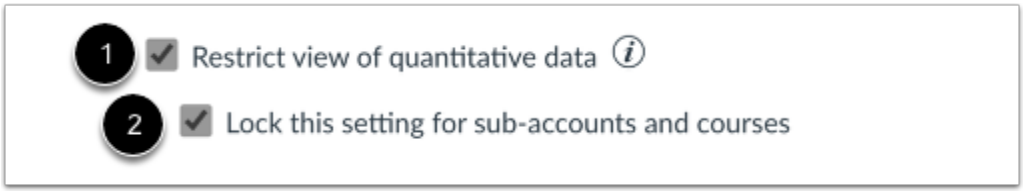
Allow Restriction of Quantitative Data in Courses



To allow users to restrict the view of quantitative data in a course, select the **Restrict view of quantitative data** checkbox.

When restricted in a course, students and observers only see qualitative data, which includes letter grades and comments.

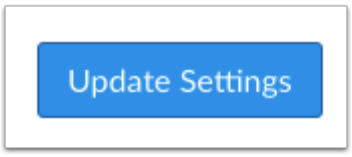
Restrict View of Quantitative Data in New Courses



To set a default for new courses and sub-accounts in the entire account so students and observers cannot view quantitative data, which includes numeric data and points, click the **Restrict view of quantitative data** checkbox [1]. Then click the **Lock this setting for sub-accounts and courses** checkbox [2].

When both options are selected, students and observers in new courses only see qualitative data, which includes letter grades and comments.

Update Settings



Click the **Update Settings** button.

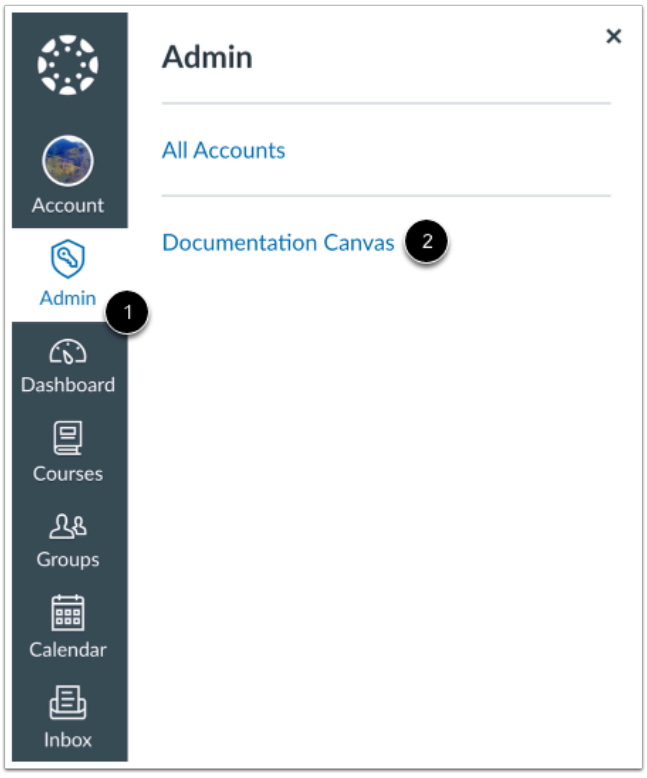
How do I disable announcement replies for all courses in an account?

As an admin, you can choose to disable replies to announcements for all courses in an account.

To manage comments, you can set the default value but allow instructors and sub-account admins to enable comments as necessary, or you can set and lock the setting for all courses and sub-accounts. The checkbox settings at the account level are passed to the sub-account and course levels as default values.

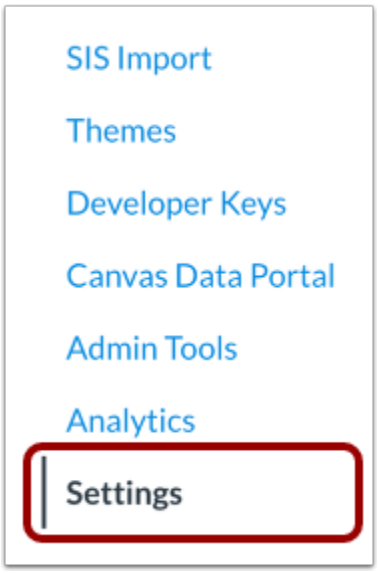
Note: Courses created before the option is applied will retain their settings until it is changed at the course level. Courses created after the option is applied will inherit the account level setting, which will persist until it is changed at the course level.

Open Account



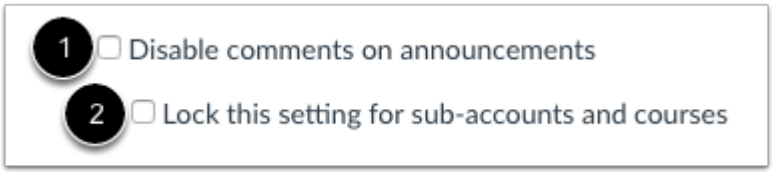
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Account Settings



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

Disable Comments on Announcements

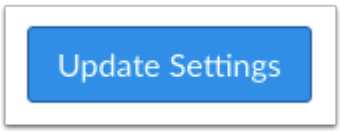


In the Account Settings tab, locate the announcements options.

To set a default for the entire account so that comments are automatically disabled for announcement comments in each course, click the **Disable comments on announcements** checkbox [1]. This option applies immediately to new courses. When enabled, all announcements show as closed for comments, but instructors can open individual announcements as necessary. Instructors can open Course Settings and remove the option completely for all new announcements.

If you want to lock the default setting for sub-accounts and courses, click the **Lock this setting for sub-accounts and courses** checkbox [2]. This option does not allow instructors to open any individual announcements or remove the limitation in Course Settings.

Update Settings



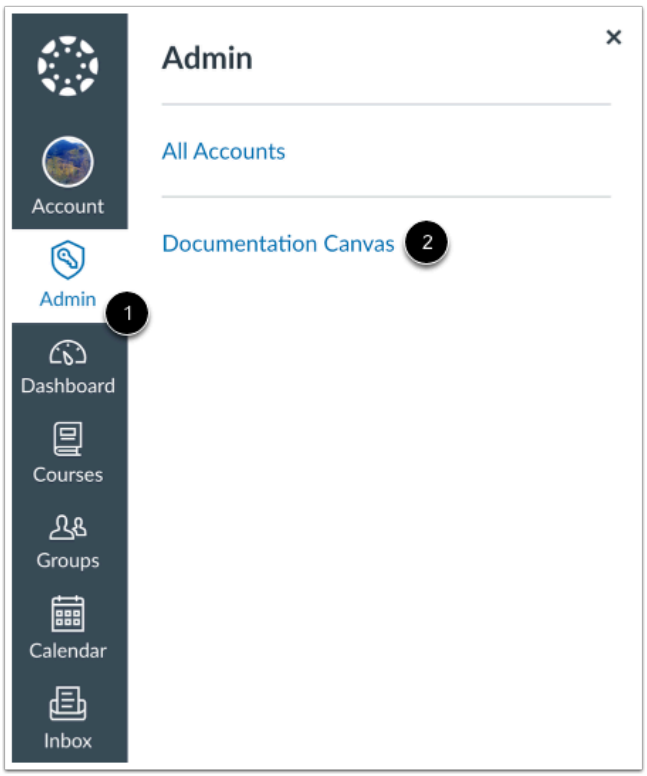
Click the **Update Settings** button.

How do I disable Canvas media uploads in the Rich Content Editor?

As an admin, you can disable Canvas media uploads in the Rich Content Editor. This option allows institutions to remove the native Canvas media icon in the toolbar in favor of using external apps for media hosting.

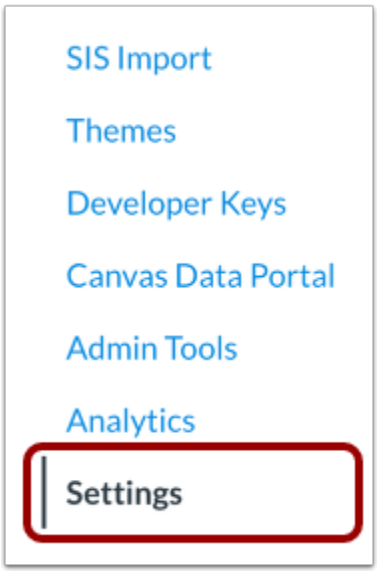
Note: Disabling Canvas media only applies to accounts and courses that have enabled the Rich Content Editor.

Open Account



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

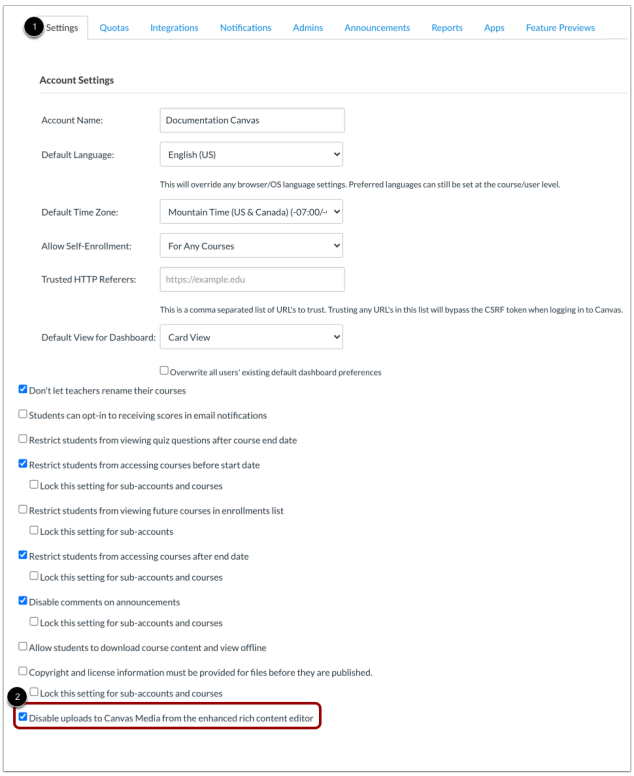
Open Account Settings



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

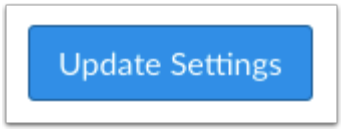
Open Account

Disable Media Uploads



In the **Settings** tab [1], click the **Disable uploads to Canvas Media from the enhanced rich content editor** checkbox [2].

Update Settings



Click the **Update Settings** button.

View Rich Content Editor



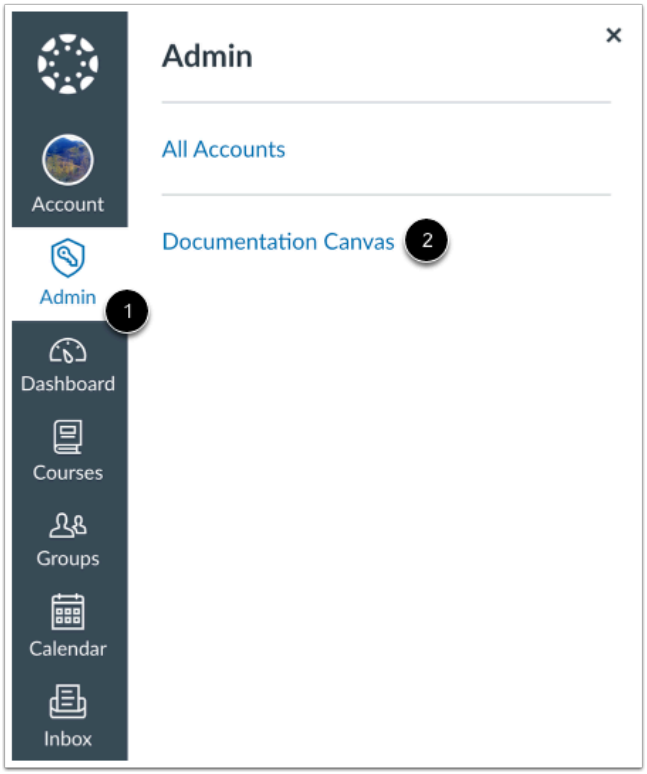
When Canvas media uploads are disabled, users cannot access the Insert Media tool from the toolbar or menubar in the Rich Content Editor [1].

If the option to Disable Canvas media uploads is not selected, users can access the Insert Media tool from the toolbar or menubar in the Rich Content Editor [2].

How do I manage file copyright settings for an account?

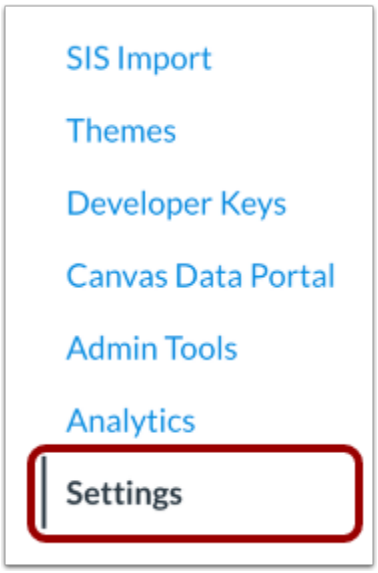
As an admin, you can manage the file copyright settings for all course file uploads in your account. Copyright settings allow you to select whether or not usage rights information is required for course file uploads by default. You can also lock this setting for all sub-accounts and courses in your account.

Open Account



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

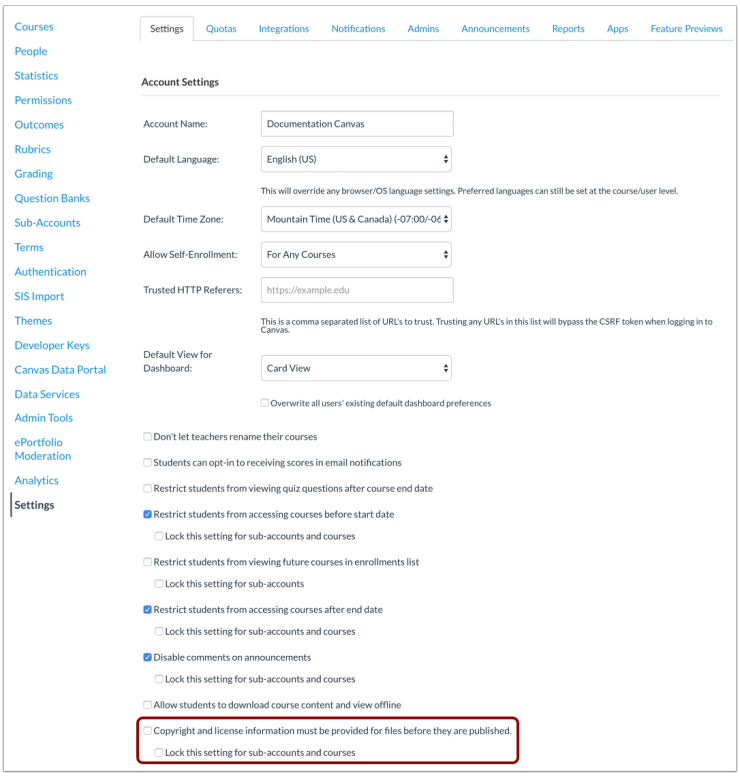
Open Account Settings



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

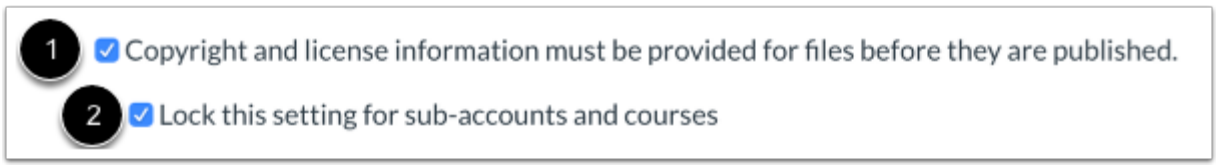
Open Account

View File Copyright Settings



Locate the file copyright settings in the Account Settings page.

Require File Copyright

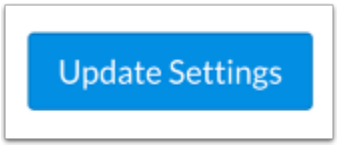


To require copyright and license information for files before they are published, click the **Copyright and license information must be provided for files before they are published** checkbox [1].

To lock this setting for sub-accounts and courses, click the **Lock this setting for sub-accounts and courses** checkbox [2]. If this option is enabled and locked, it will be enabled in all sub-accounts and courses and cannot be changed.

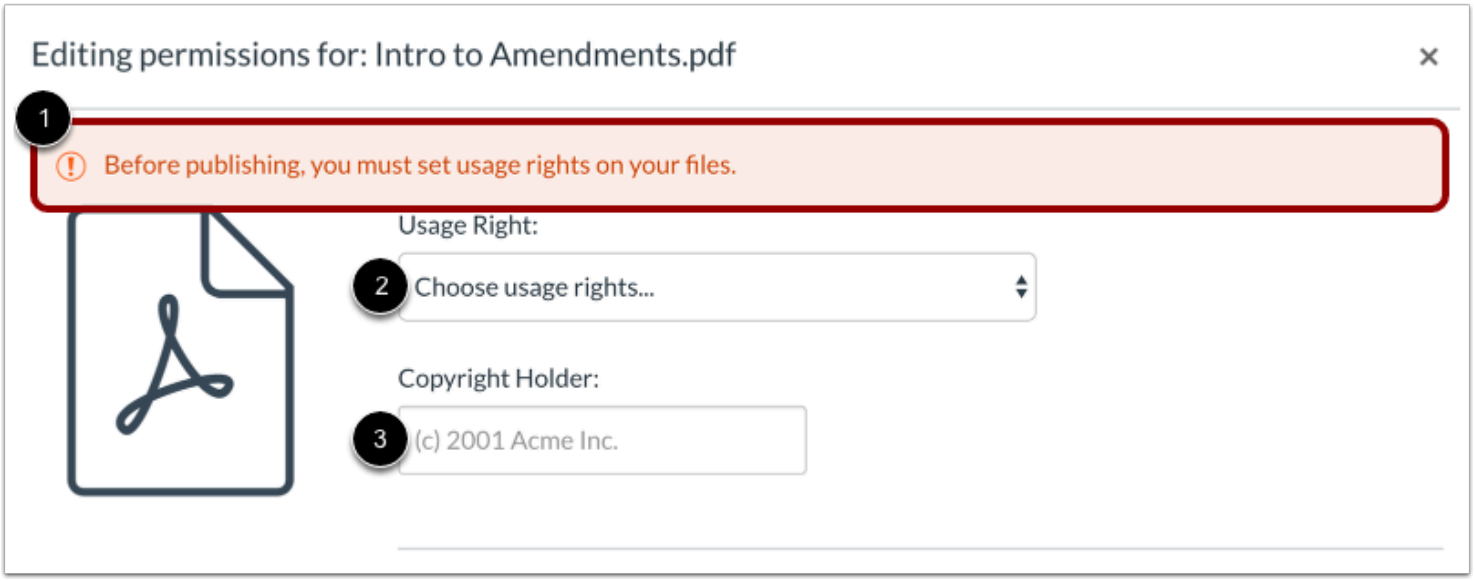
If the Copyright and license information must be provided for files before they are published option is enabled and not locked, it will be enabled in all sub-accounts and courses by default, but can be disabled by sub-account admins or instructors, respectively.

Update Account Settings



To update your account settings, click the **Update Settings** button.

View File Upload Message

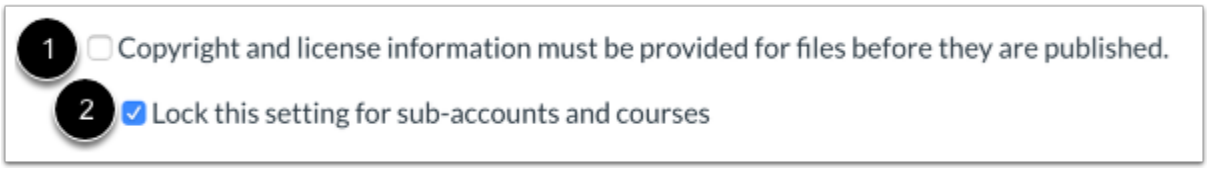


If copyright and license information is required at the course level, users will see an error message indicating that they must set usage rights before they can publish a file [1].

Usage rights can be selected in the **Usage Right** drop-down menu [2] and **Copyright Holder** field [3].

Note: Usage right settings do not apply to user files.

Remove File Copyright Requirement

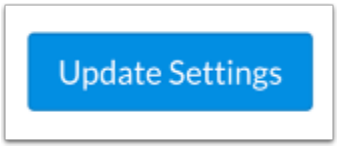


To remove the requirement for copyright and license information for files before they are published, deselect the **Copyright and license information must be provided for files before they are published** checkbox [1].

To lock this setting for sub-accounts and courses, click the **Lock this setting for sub-accounts and courses** checkbox [2]. If this option is locked but not enabled, it will be disabled in all sub-accounts and courses and cannot be managed in sub-accounts or courses.

If the Copyright and license information must be provided for files before they are published option is not enabled and not locked, it will be disabled in all sub-accounts and courses by default, but can be enabled by sub-account admins or instructors, respectively.

Update Account Settings



To update your account 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 Canvas help resources. Depending on their role, users can view up to eight 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 highlight links by adding a New label to a link or by featuring the link in the Help menu.

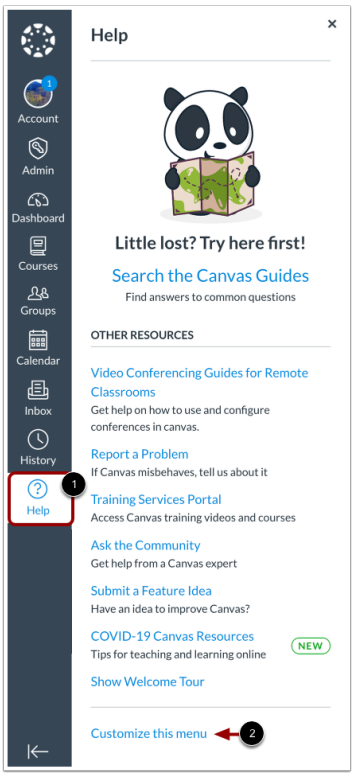
You can also change the Help icon and text that displays throughout Canvas.

This article 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:

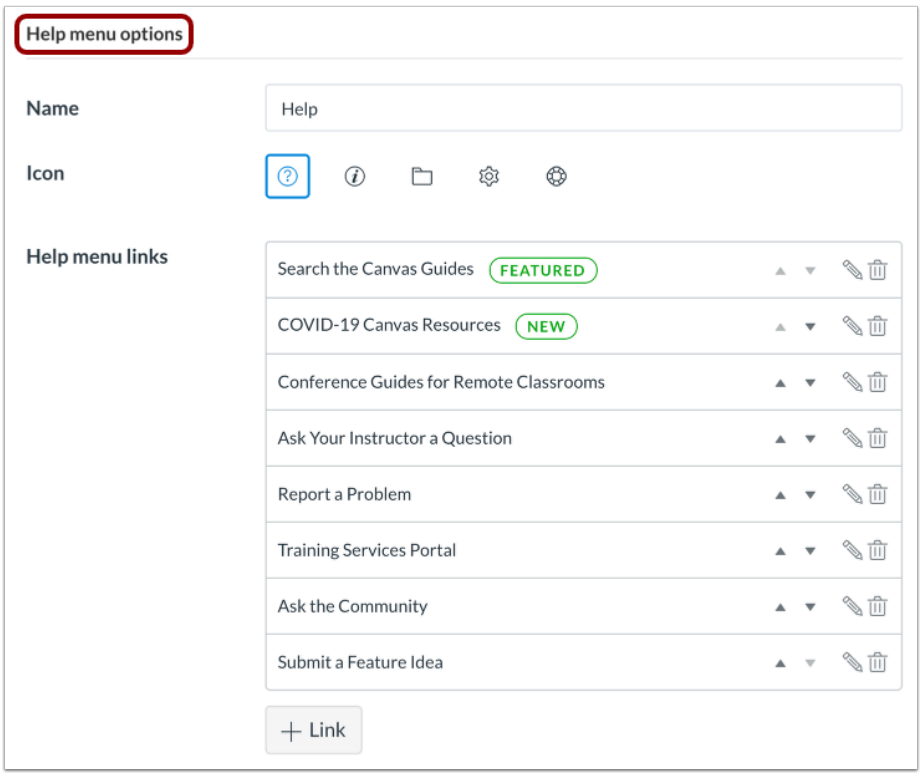
- Canvas Help menu customizations are only available at the account level and automatically apply to all subaccounts. When opening the Help menu, only admins can view the customization link.
- Help menu customizations are not available in Free-for-Teacher accounts.
- The Help menu links also display when a user accesses the Help link in the Login page. However, the Ask Your Instructor a Question and Ask the Community links are never part of the Help menu in the Login page since the Login page does not associate a user by role.
- The Help menu includes a Show Welcome Tour link which displays a short welcome tour for Admins, Instructors, and Students. This link cannot be disabled.
- Release note links can be added to the Help Menu by enabling the Embedded Release Notes feature option. When the feature option is enabled, this feature cannot be customized in Account Settings.

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 Global Navigation, the footer of the login page, and the top menu bar in SpeedGrader. The name should be no more than 30 characters.

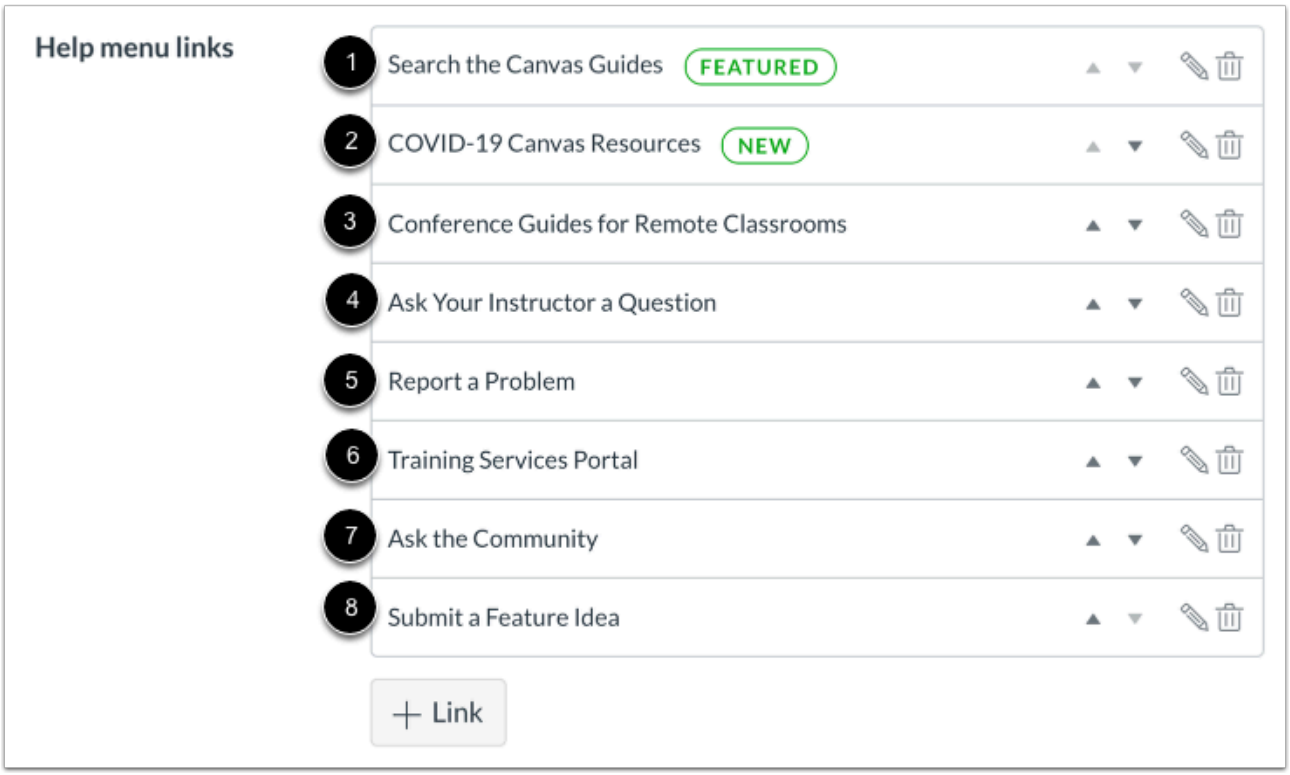
Customize Icon



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 Global Navigation. To best assist your account users, the navigation icon should compliment the name of the Help menu.

Customize Help Menu Links

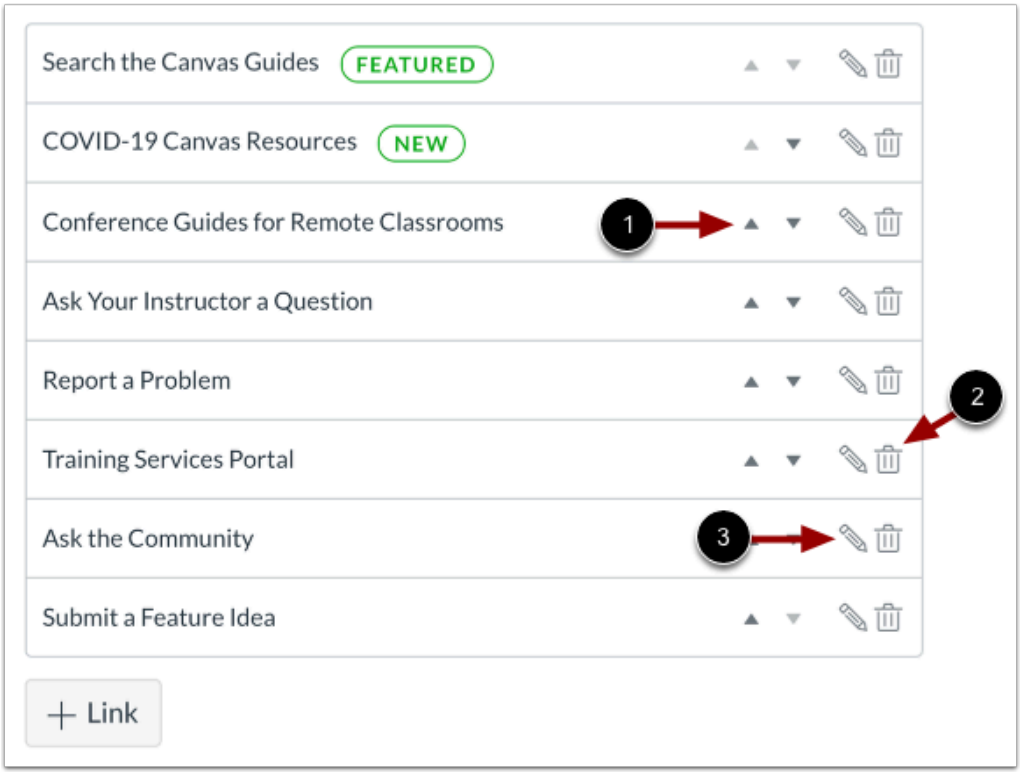


You can allow your users to view up to eight default Help menu links according to their role:

- **Conference Guides for Remote Classrooms** [1]: Users can view and search guides and resources for using Conferences in remote classrooms and online learning
- **COVID-19 Canvas Resources** [2]: Users can view resources for teaching and learning online

- **Ask your Instructor a Question** (Students Only) [3]: 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** [4]: Users can search the Canvas Guides for information about features inside of Canvas
- **Report a Problem** [5]: 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
- **Training Services Portal** [6]: Users can access training resources provided by Instructure
- **Ask the Community** (Non-Students Only) [7]: Users can exchange ideas and solutions regarding Canvas functionality with Canvas experts and their Canvas peers
- **Submit a Feature Idea** [8]: Users can submit ideas about how to make Canvas better

Manage Default Links

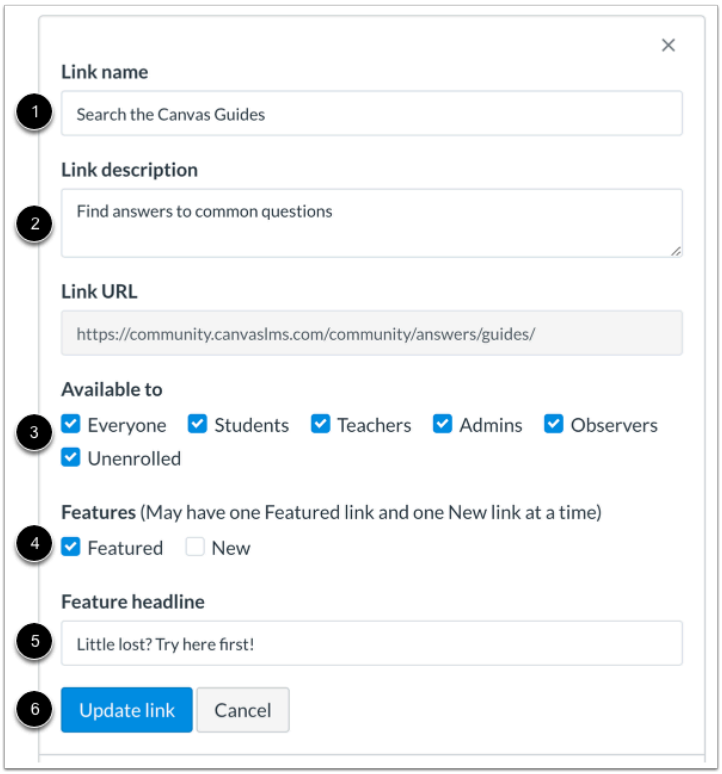


To move a default link up or down in the menu, click the up or down arrow [1]. To delete a default link, click the **Delete** icon [2]. To edit a default link, click the **Edit** icon [3].

Notes:

- 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, Ask the Community, and Training Services Portal links are never part of the Help menu in the Login page since the Login page does not associate a user by role.
- The Show Welcome Tour link cannot be modified or removed from the Help menu.

Edit Default Links



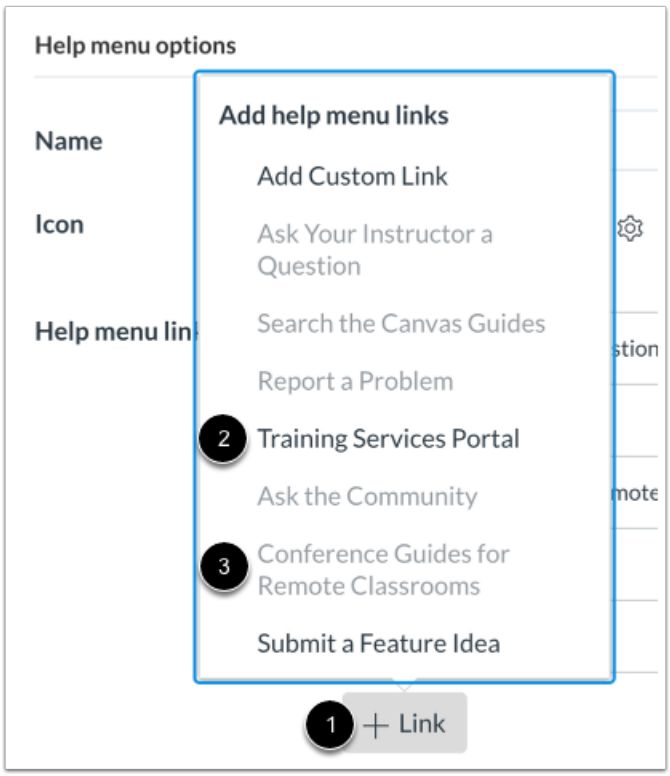
To edit the name of a default link, type in the **Link name** field [1]. To edit the description of a default link, type in the **Link description** field [2]. To select which users can view a default link, click the user role **Available to** checkboxes [3]. Options include Everyone, Students, Teachers, Admins, Observers, and Unenrolled. Unless otherwise changed, all user roles are selected for custom links.

Use the **Features** checkboxes [4] if you wish to have the link display with a New label or as a featured link. To add a custom featured headline, edit the **Featured headline** field [5]. You may only have one featured link and one new link in the Help menu.

To save your changes, click the **Update link** button [6].

Note: The Link URL cannot be changed for default links.

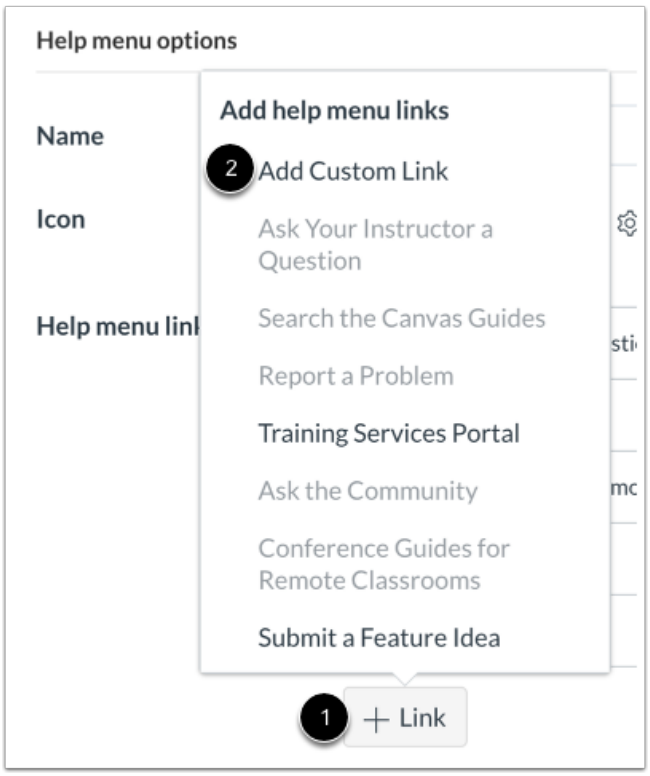
Restore Default Links



If you want to restore a default link in the Help menu, click the **Add Link** button [1] and select the name of the link [2]. Faded links cannot be added as they are already in the Help menu [3].

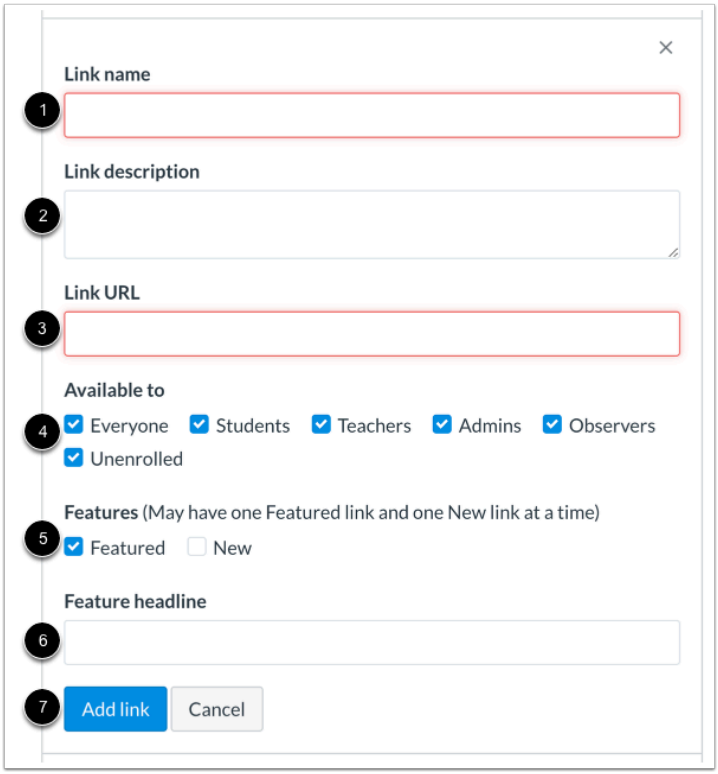
Open Account

Restore Default Links



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.

The link URL field also supports the telephone URL and mailto schemes.

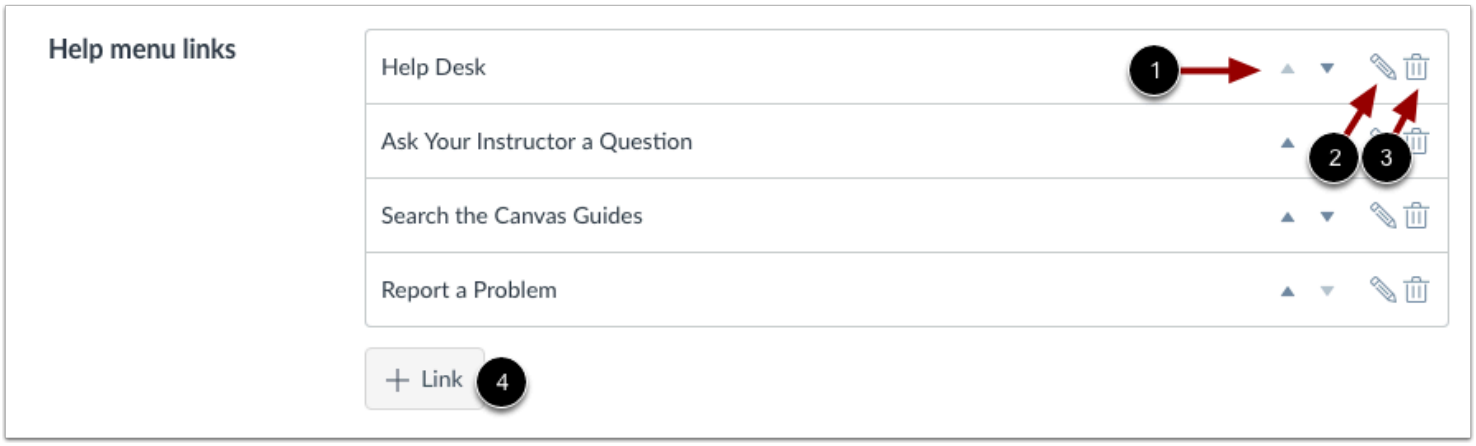
- To create a click-to-call link in the Help menu, enter tel:+ followed by the internal format of the phone number (country code, area code, and number) in this field. Additionally, users can use the telephone link to call the number through their computers. When a user clicks the link, the user receives a confirmation alert before the call is placed. (Users *may* be able to access telephone links when viewing Canvas in a mobile browser, although mobile browsers are not officially supported by Canvas.)
- To create a mailto scheme in the Help menu, enter mailto: followed by the email address. When a user clicks the link, the user's browser opens the email service configured in the user's browser and creates an email to the designated email address. If no browser configuration is set, the browser will try to pass the email link to a desktop email program.

For the **Available to** checkboxes [4], select the user(s) who can view the link. Options include Everyone, Students, Teachers, Admins, Observers, and Unenrolled. Unless otherwise changed, custom links select checkboxes for all roles.

Use the **Features** checkboxes [5] if you wish to have the link display with a New label or as a featured link. To add a custom featured headline, edit the **Featured headline** field [6]. You may only have one featured link and one new link in the Help menu.

Click the **Add Link** button [7].

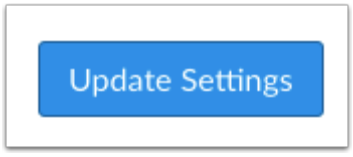
Manage Custom Links



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 select a course template in an account?

If you have enabled a course as a course template, you can select that template in an account or sub-account. Once a template is selected, all new courses created in that account or sub-account will be populated with content from the course template. This includes courses created through the Canvas UI, SIS import, or API endpoints.

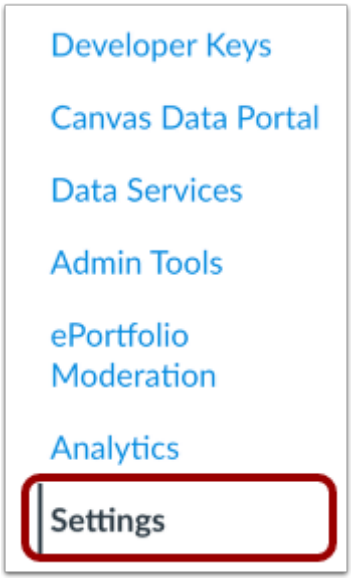
New courses created from the template are not associated with the template, and any changes to the new course must be made directly in the new course. To compare course templates to blueprint courses and Canvas Commons, view the Course Content Distribution Comparison resource document.

In order to manage course templates, an admin must have the Manage Course Templates permission enabled. This is a granular permission that is divided into individual permissions for creating, deleting, and editing templates. For more information, view the Account Permissions resource document.

Notes:

- Creating a course using a template functions in essentially the same way as copying a course. Course copies may not include all content. For more details, please see the import content section in the Canvas Basics Guide.
- Creating a course using a course template does not impact file quotas.

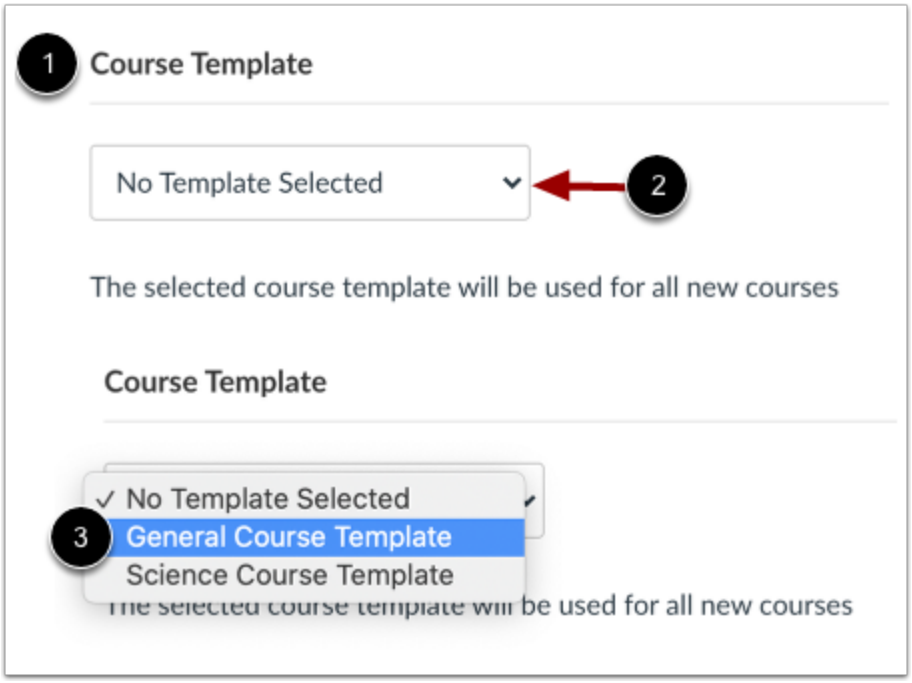
Open Settings



Open Account

Open the account or sub-account where you want to apply the course template. In Account Navigation, click the **Settings** link.

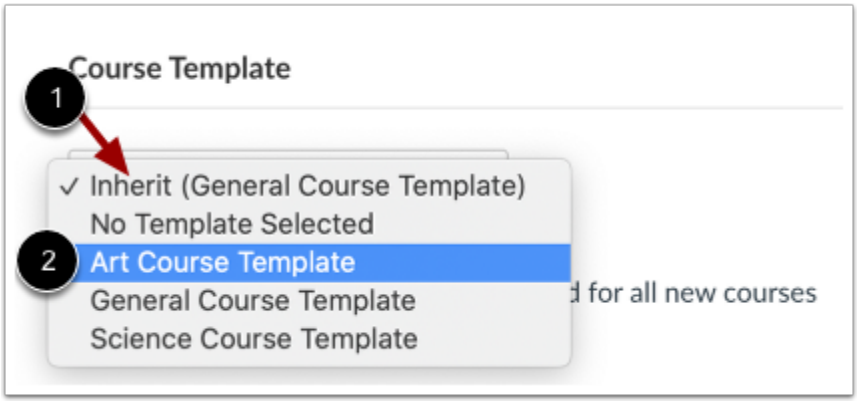
Select Template



Locate the **Course Template** settings [1]. By default, no course template is selected at the account level.

To select a template, click the **Template** drop-down menu [2] and select the template you want to use [3].

View Inherited Template



If you are selecting a course template in a sub-account, the template is identified by an **Inherit** label [1]. To select a unique template for a sub-account, click the name of the template [2].

Update Settings

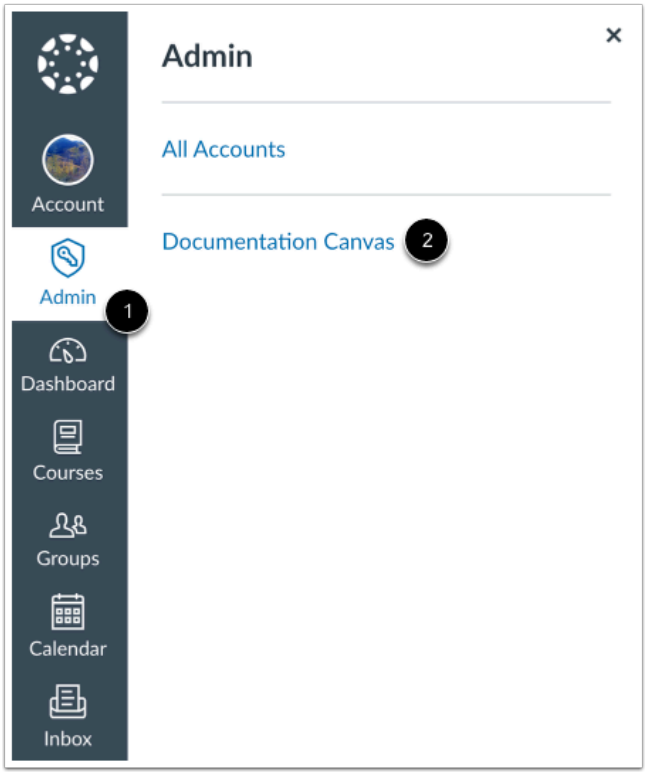


Click the **Update Settings** button.

How do I view reports for an account?

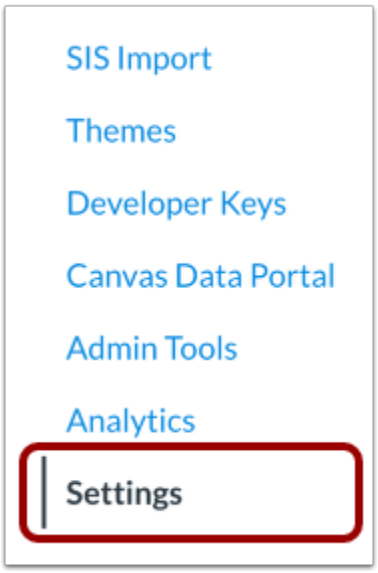
Account-level admins have access to Canvas reports that can be used to review account data. Canvas includes a set of default reports, though other customized reports may be included for your institution. Learn about report configurations in the Canvas Default Account Reports resource document.

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.

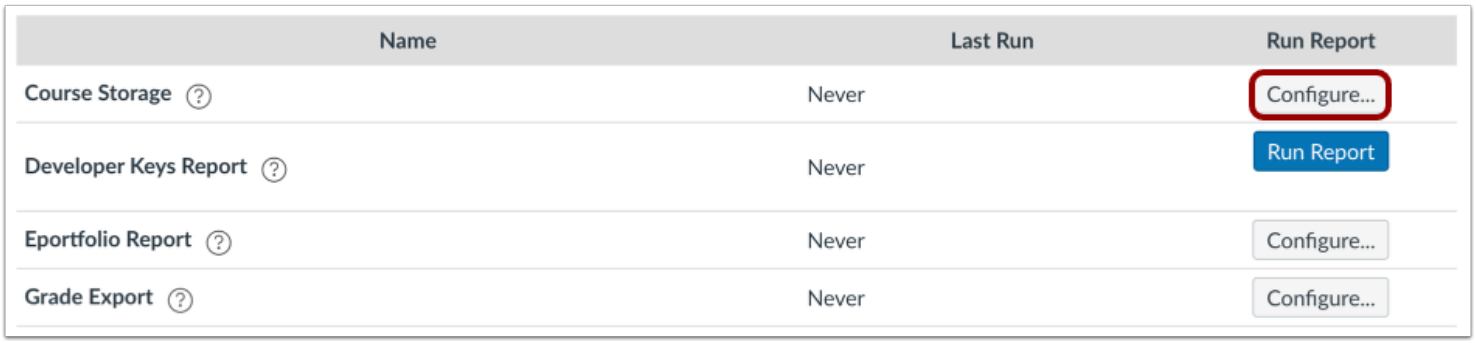
View Reports



The Reports page shows all available reports. Each report includes the name [1] and a help icon that explains more about the report [2]. You can also view the last time the report was run, if any [3].

Note: The Last Run report displays in the language of the user who last ran the report.

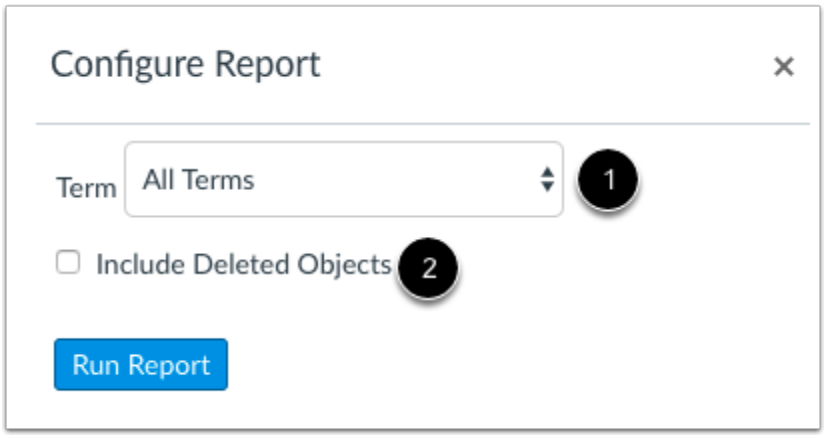
Configure Reports



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

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

Select Term

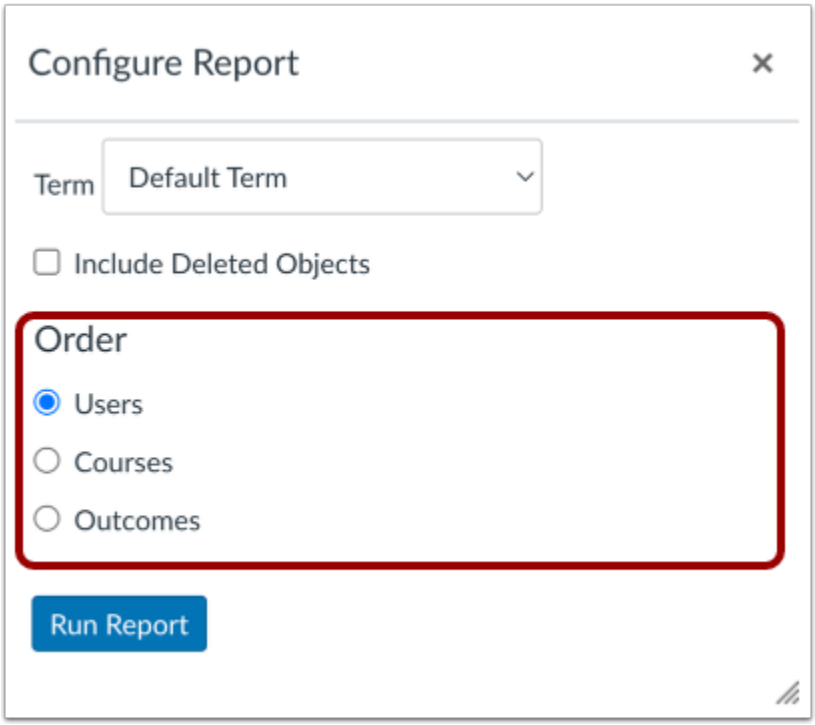


All reports except the LTI Report, Outcome Export, and User Access Tokens reports require you to select a term. In the **Term** drop-down menu, you can choose from the Default Term [1], or any active, future, or past terms. Courses with hidden assignments may not accurately reflect scores in this report.

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

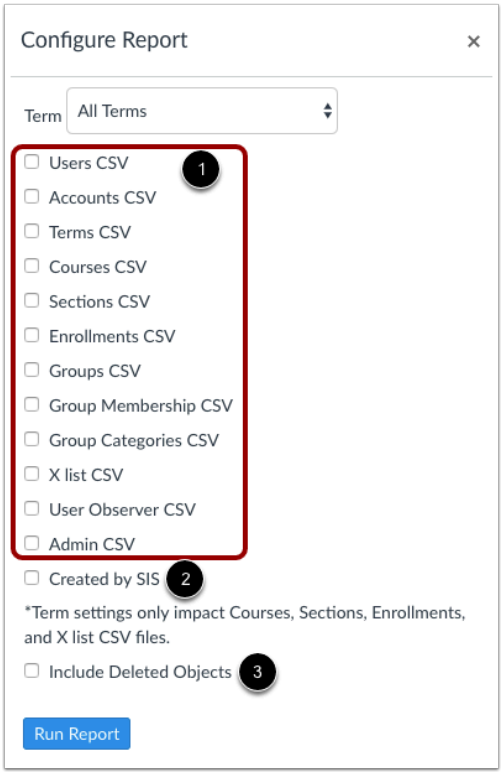
Note: The All Terms option is not available for the Outcome Results report; you must select a specific term.

Select Report Order



The Outcome Results report allows you to choose how to order the report. Ordering options are by Users, Courses, or Outcomes. By default, the report orders by Users. Select the radio button for your preferred report order.

Select CSV Files



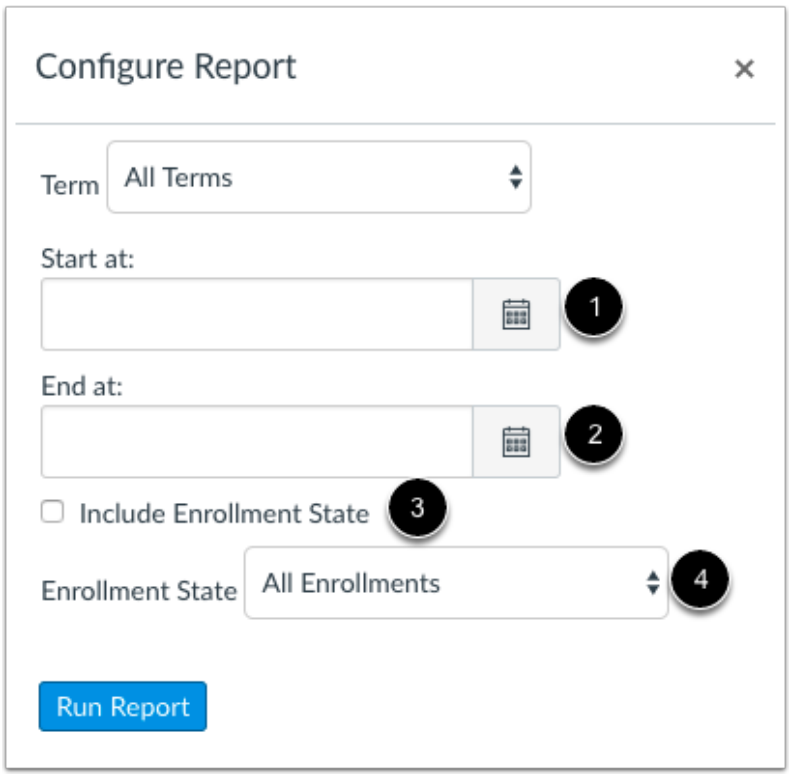
The Provisioning and SIS Export reports ask you to select the CSV files you want to generate for a selected term [1]. Select the checkboxes next to the files you want to generate. Files can be generated for Users, Accounts, Terms, Courses, Sections, Enrollments, Groups, Group memberships, Group categories,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

If you want to only view data created by your SIS, select the **Created by SIS** checkbox [2]. Otherwise, the CSV files display all data created in your Canvas account, including information created by SIS and through the interface.

To include concluded courses or deleted objects in the report, click the **Include Deleted Objects** checkbox [3].

Note: The selected term only impacts Courses, Sections, Enrollments, and Cross-listing CSV files.

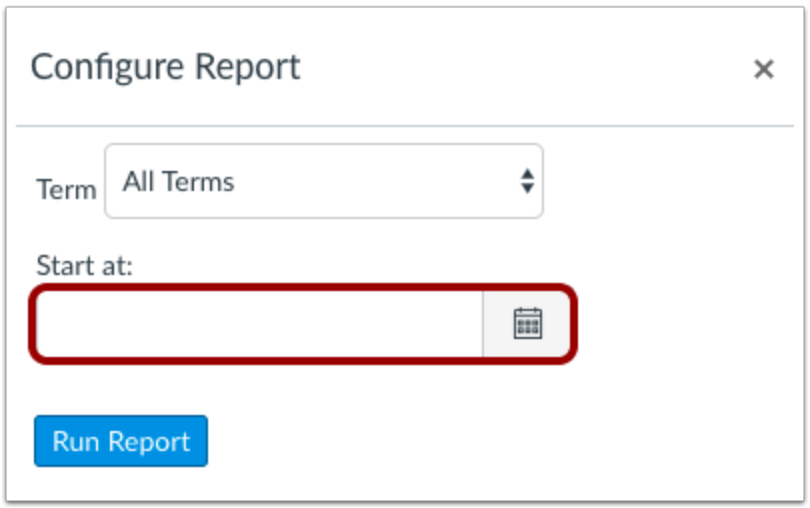
Select Dates and Enrollment State



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.

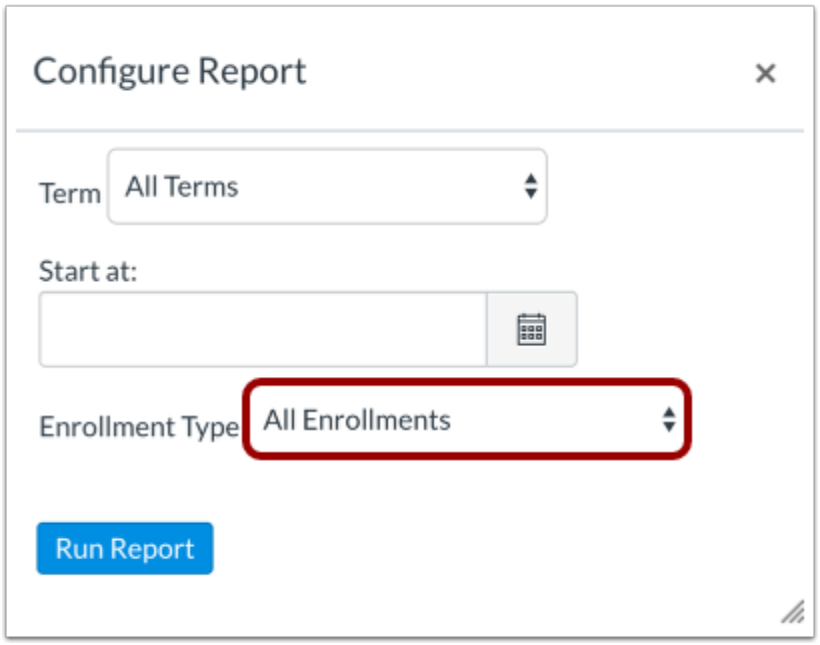
Select Start Date



The User Course Access Log and Zero Activity reports ask 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.

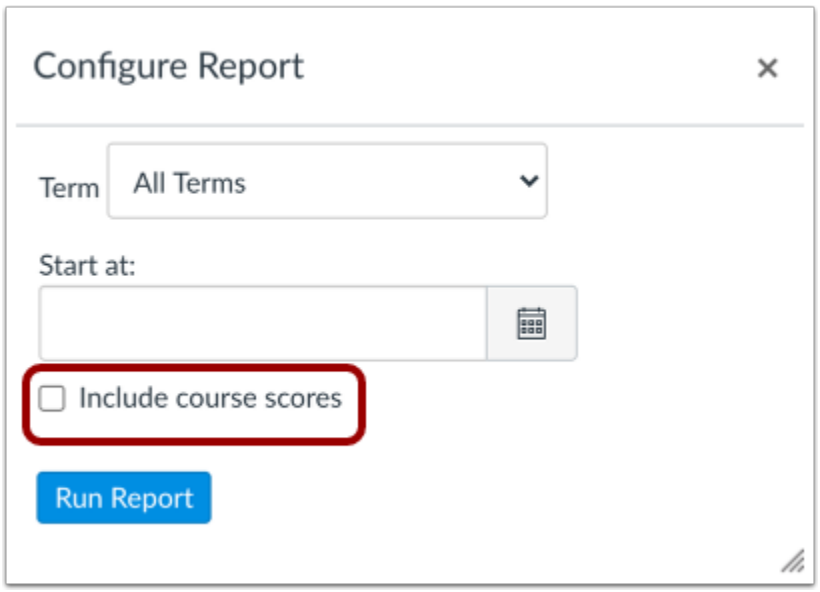
Note: A maximum of two years' data will be retrieved in the User Course Access Log report. If a user had access to a course over two years prior, a message displays but details cannot be provided.

Select Enrollment Type



The User Course Access Log report allows you to choose to include all or individual enrollment types. In the Enrollment Type drop-down menu, select all enrollments, student enrollments, teacher enrollments, TA enrollments, observer enrollments, or designer enrollments.

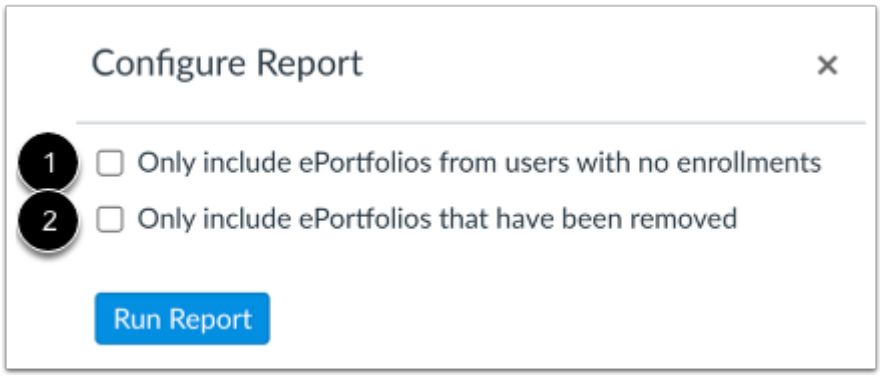
Select Course Scores



The SIS Submission Report allows you to include course scores. Click the **Include course scores** checkbox. By default, the SIS Submission Report does not include course scores.

Note: The SIS Submission Report may only display for institutions that have authenticated Canvas to post grades to their SIS.

Filter ePortfolio Data

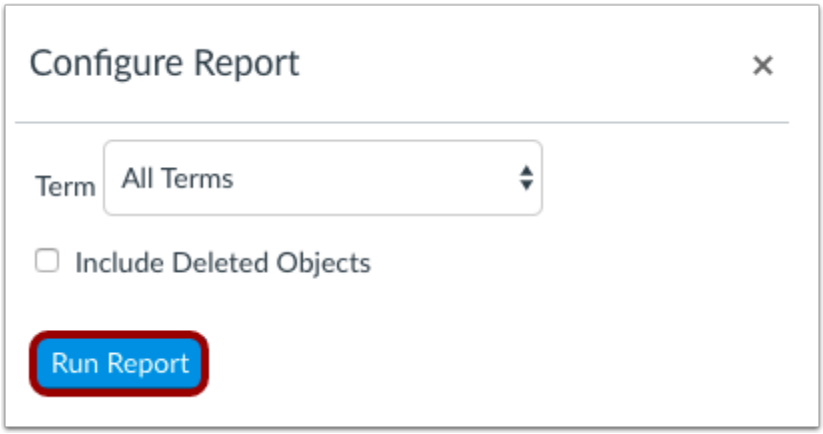


The ePortfolio Report allows you to filter the data displayed in the report.

To only display ePortfolios from users without enrollments in your Canvas account, click the **Only include ePortfolios from users with no enrollments** checkbox [1].

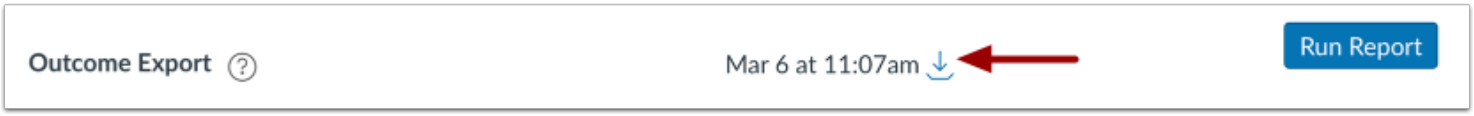
To only display removed ePortfolios, click the **Only include ePortfolios that have been removed** checkbox [2].

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.

Note: When an account report fails, an error message displays with an accompanying error code.

How do I manage feature options for an account?

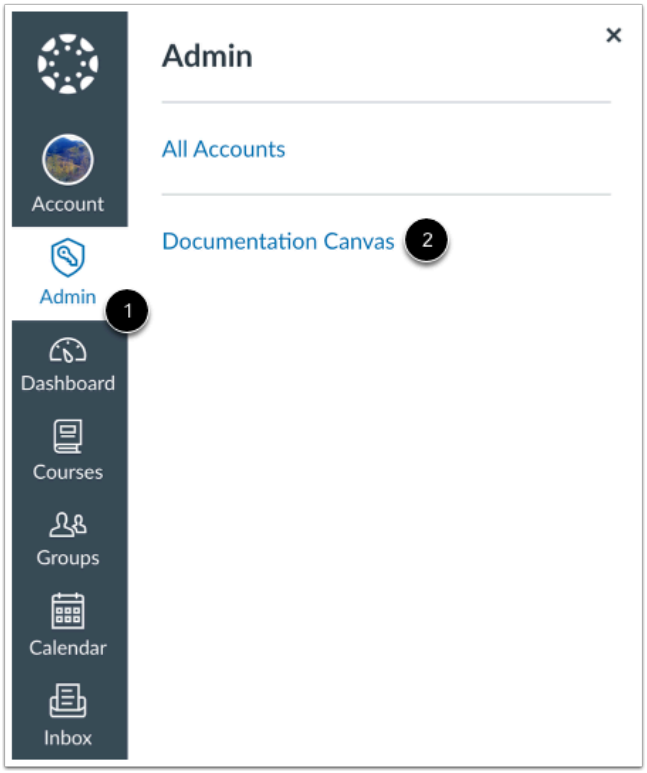
Some Canvas features are optional or new and can be turned on or off. This lesson gives an overview of how to manage feature options for an entire account. You can manage some features on the account, sub-account, course, and user levels. On the course level, you can give instructors the option to implement features on a course-by-course basis. Instructors can view and manage course-level feature options in Course Settings. Admins and instructors have no control over user-level feature options for other users.

By default, most feature options are set to Off and Unlocked, which means they are visible at the course level but not turned on. You can set feature options On or Off. The state you select is the default for sub-accounts and courses. You can also lock or unlock some features to prevent or allow other users to change the default at the sub-account or course level. Some features default to On, and others only display when they are enabled by your Customer Success Manager. For details on all feature options available in Canvas, visit the Canvas Feature Option Summary resource document.

Notes:

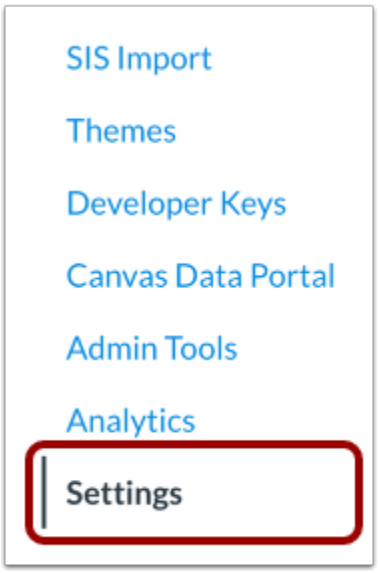
- Feature option settings are never copied from production and always retain their default settings. Feature options must be managed individually in the test and beta environments.
- Some feature options may not be available in sub-accounts and Free-for-Teacher accounts. For more information about available feature options in Free-for-Teacher accounts, please view the Canvas Account Comparisons resource document.
- In sub-accounts, you can only manage unlocked account-level feature options.
- In Free-for-Teacher accounts, you cannot manage account-level feature options.

Open Account



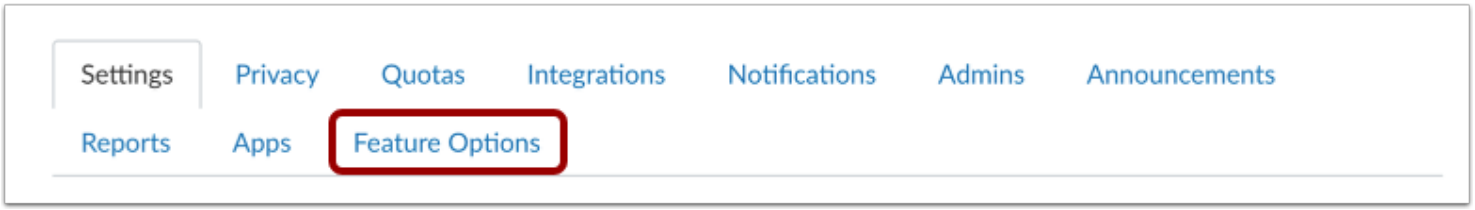
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Settings



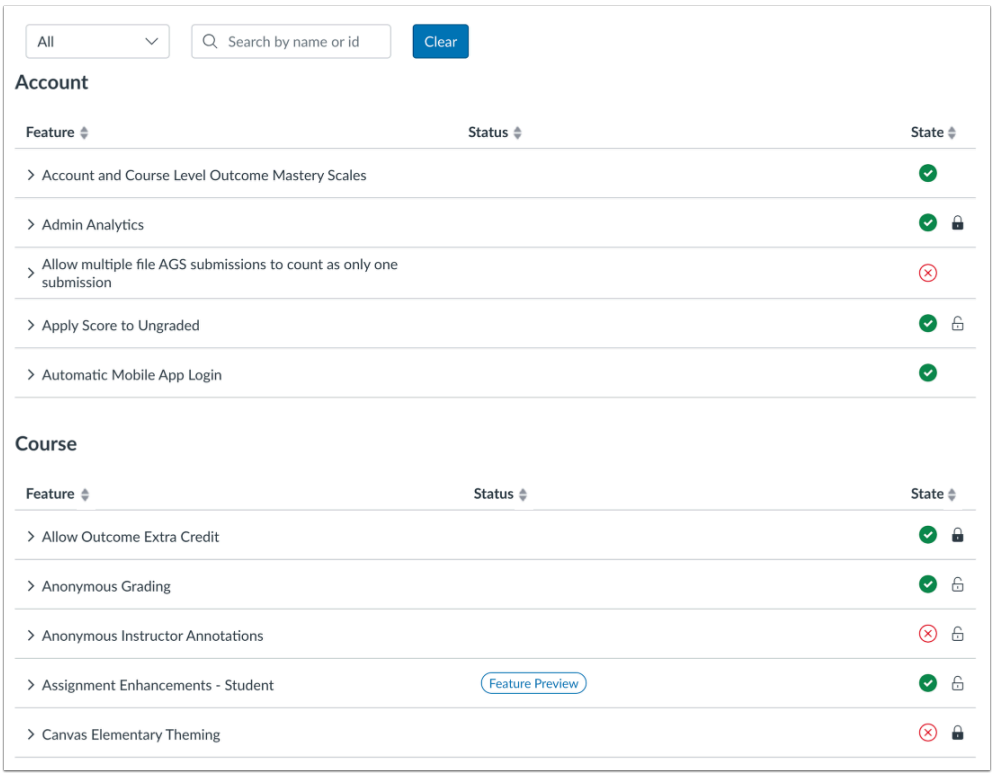
In Account Navigation, click the **Settings** link.

Open Feature Options Tab



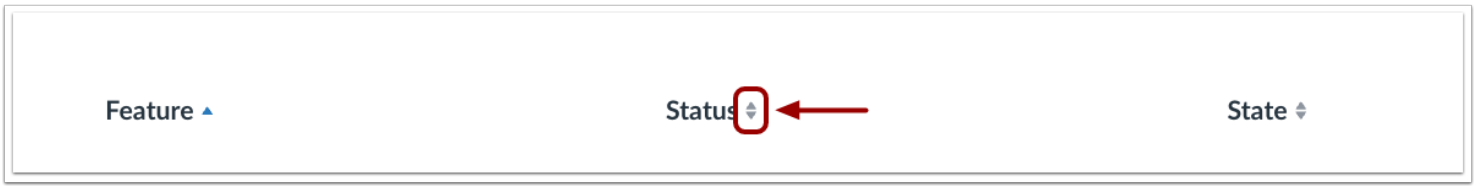
Click the **Feature Options** tab.

View Feature Options



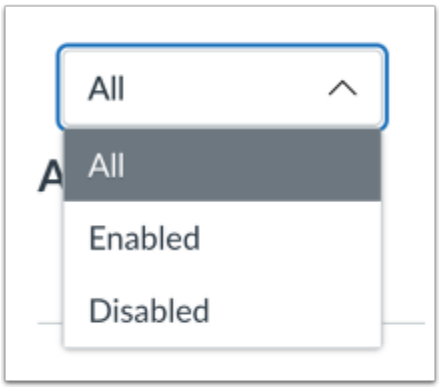
Available features display in the Feature Options tab. Some new features may need to be enabled by your Customer Success Manager (CSM).

Filter Ascending and Descending Icon Options



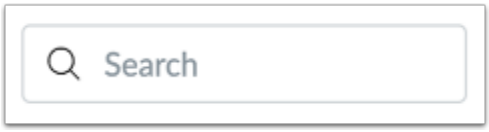
You can sort feature options by feature, status or state. Click the ascending and descending icons to filter by feature, status or state.

Filter Feature Options



To filter by all features, enabled features, or disabled features, click the **Filter** drop-down menu.

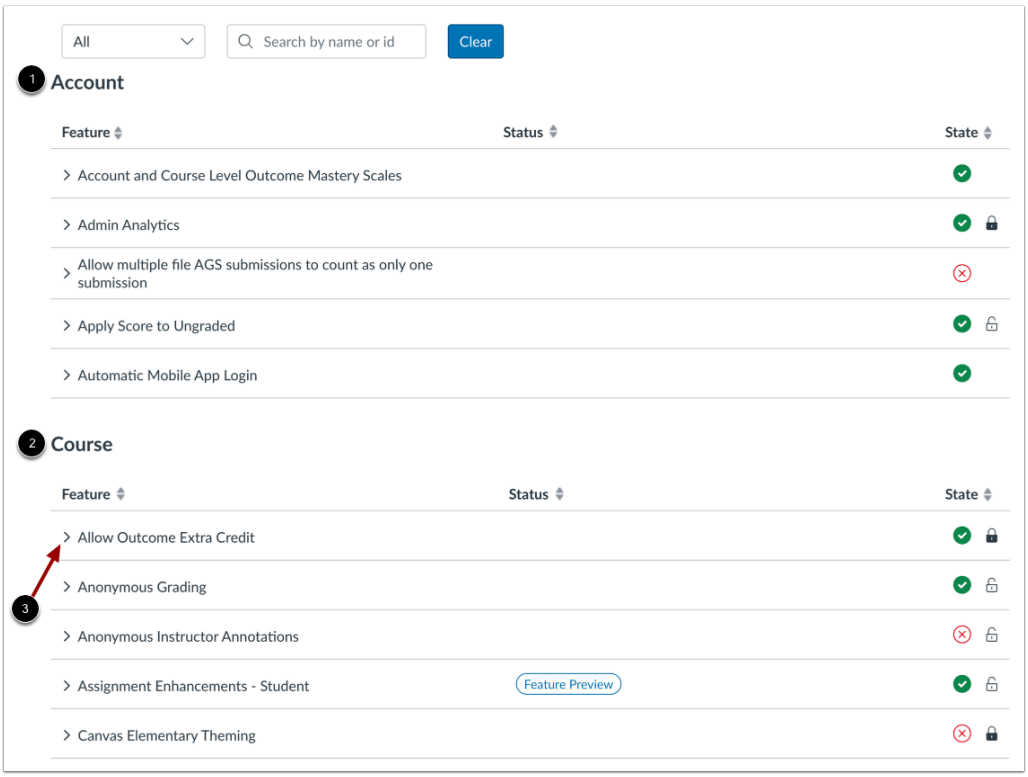
Search Feature Options



To search for a feature option, type a keyword in the **Search** field.

Open Account

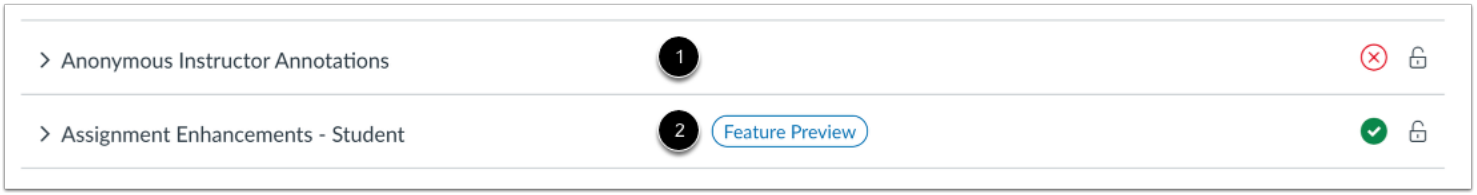
View Feature Hierarchy



Once features are available, they are listed by Account [1] or Course [2], depending on the feature's hierarchical level.

Each feature includes a feature description. To expand the feature box and display the description, click the arrow icon [3].

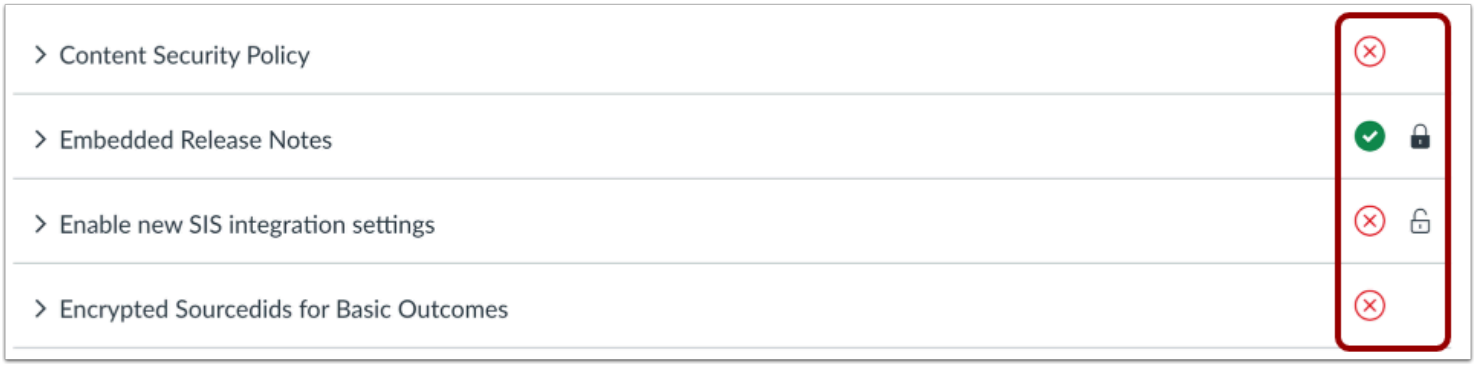
View Feature Tags



Feature tags help identify the state of each feature. No tag means the feature is stable and ready for use in your production environment [1].

Features may include a **Feature Preview** tag [2], which means the feature is in active development. You can opt-in to the feature and join the Community user group to help improve the feature through direct feedback. Access to the user group is noted in the description of the feature option.

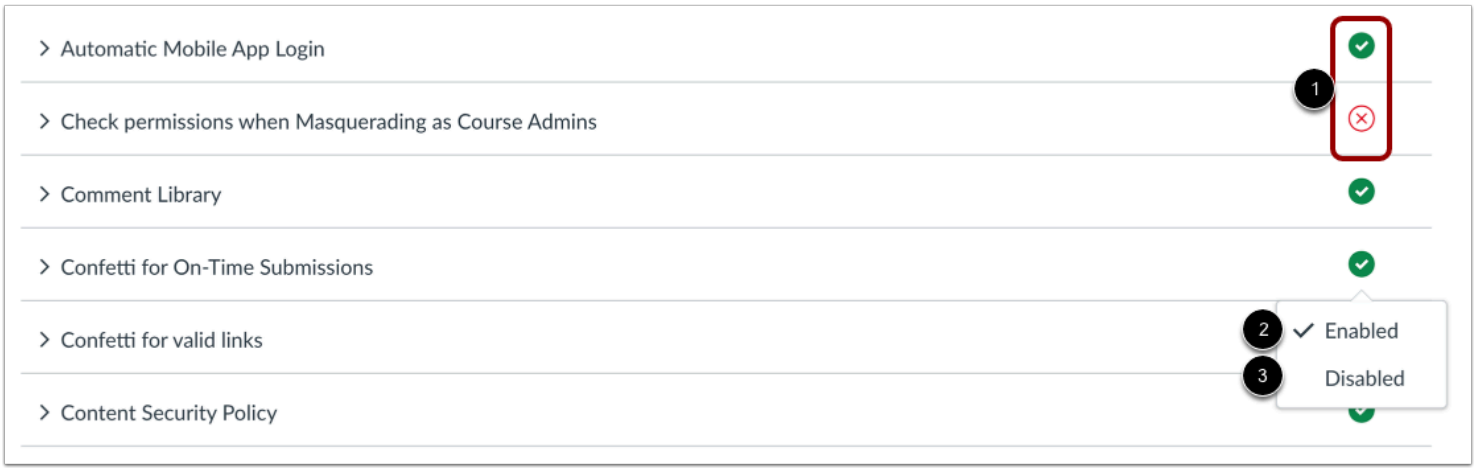
View Feature States



As an account level admin, you can choose to enable or disable features by default in the account and all subaccounts.

If a feature can be edited at the sub-account or course level, you can choose to lock or allow editing of the default feature state at the sub-account or course level.

Manage Default Feature State



As an account level admin, you can choose to enable or disable features by default for the account and all subaccounts.

To enable or disable a feature, click the feature's **State** icon [1].

To enable the feature by default for the account and all subaccounts, click the **Enabled** option [2].

To disable the feature by default for the account and all subaccounts, click the **Disabled** option [3].

Note: Depending on feature functionality, when you enable a feature, Canvas may display a warning message asking to confirm your option, as some account features cannot be turned off once they are enabled.

View Default Feature State



Features enabled by default display the **Enabled** icon [1].

Features disabled by default display the **Disabled** icon [2].

Allow and Lock Features



Some features can be managed at the sub-account or course levels. As an account admin, you can choose to lock or allow those features to be edited at the sub-account or course levels.

To allow or disallow a feature's default state to be edited at the sub-account or course levels, click the feature's **State** icon [1].

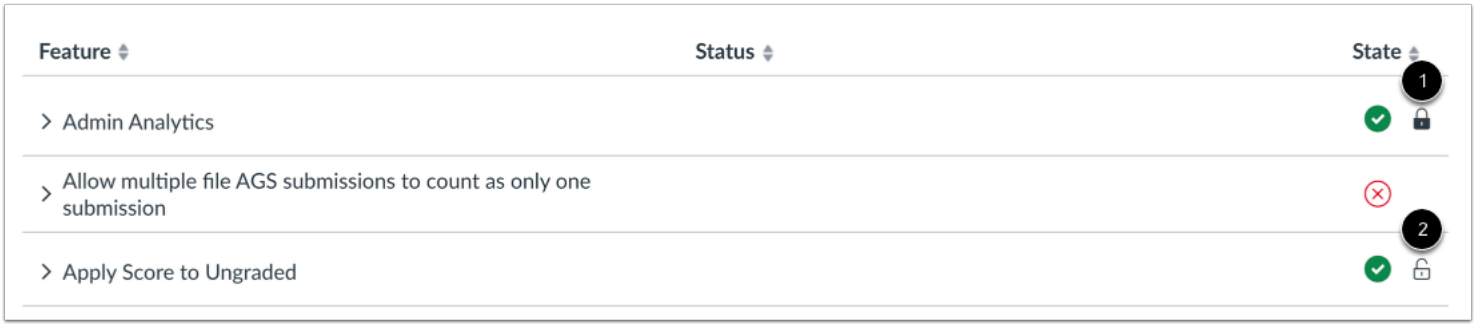
To lock the default feature state so it cannot be edited at the sub-account or course level, select the **Lock** option [2].

To allow a feature's default state to be edited at the sub-account or course level, uncheck the **Lock** option.

Notes:

- Features that can only be managed at the account level will not display a locked or unlocked icon [3]. Those features' default states are set for the account and all subaccount.
- Depending on feature functionality, when you unlock a feature state, Canvas may display a warning message asking to confirm your option, as some account features cannot be turned off once they are enabled.

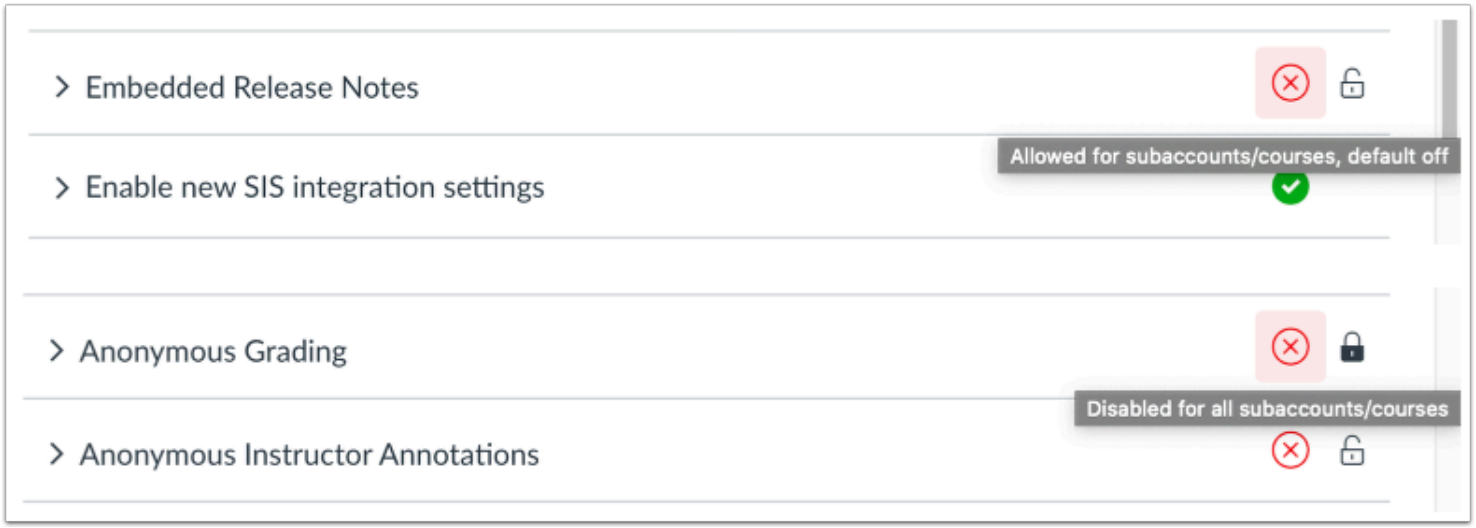
View Allowed and Locked Features



Locked features display the **Locked** icon [1].

Allowed features display the **Unlocked** icon [2].

View Feature State Tooltips



To view a more detailed description of the state of the feature preview, hover over the feature preview state icon. A tooltip explains the current state of the feature preview. The tooltip displays the following descriptions based on the feature preview state:

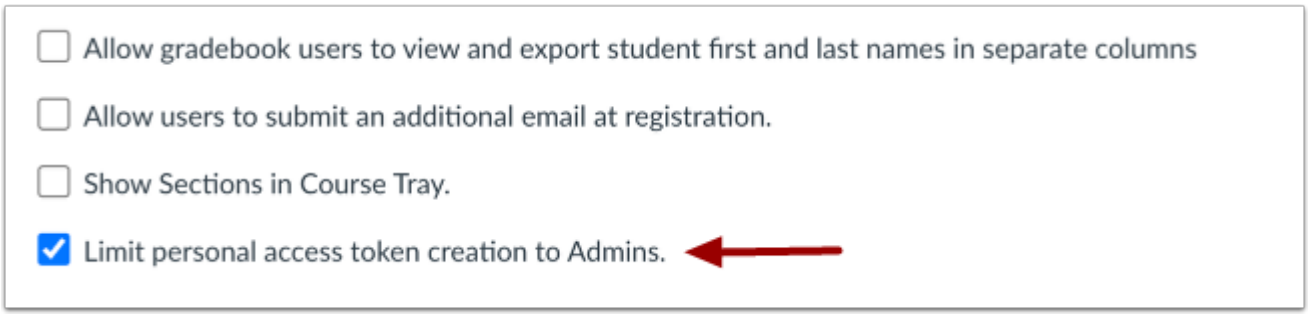
Account Feature Previews:

- State: Enabled and Unlocked | Tooltip: Allowed for subaccounts/courses, default on
- State: Enabled and Locked | Tooltip: Enabled for all subaccounts/courses
- State: Disabled and Unlocked | Tooltip: Allowed for subaccounts/courses, default off
- State: Disabled and Locked | Tooltip: Disabled for all subaccounts/courses

Course Feature Previews

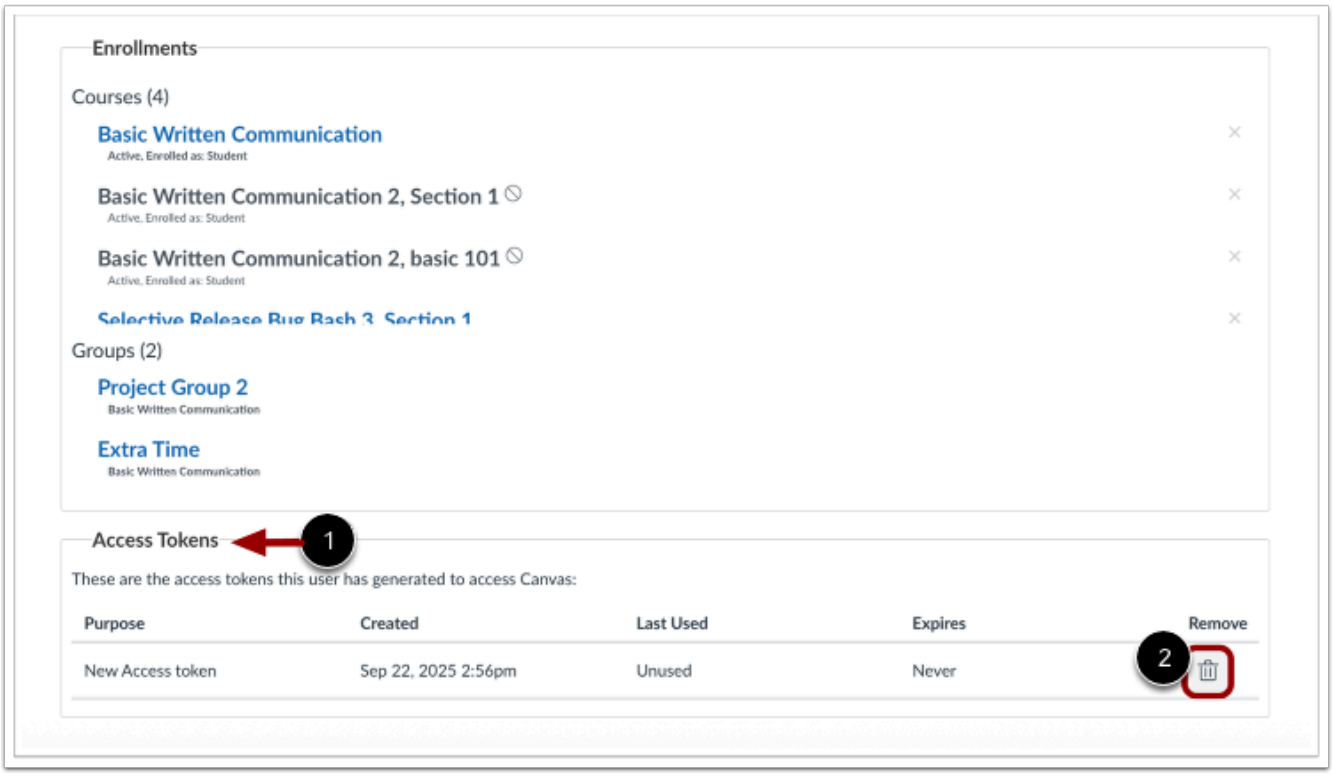
- State: Enabled and Unlocked | Tooltip: Optional in course, default on
- State: Disabled and Unlocked | Tooltip: Optional in course, default off

Limit Personal Access Token



The Limit personal access token creation to Admins setting allows only admins with the Users-Manage Access Token permission to generate access tokens.

User Details Access Tokens



You can view the Access Tokens section [1] on a user's details page and delete any unwanted user-generated tokens [2].

This allows you to more easily manage access tokens, improving security and oversight by allowing them to view and delete user-generated tokens directly from the user's details page.

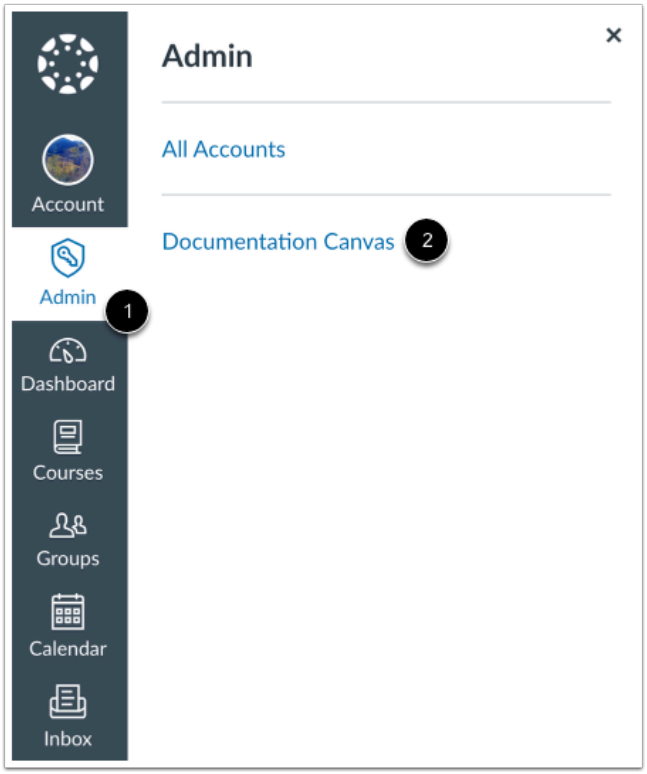
Notes:

- This permission will be enabled by default for AccountAdmins in all accounts and for users with the account-level Create Access Tokens permission at institutions where it has been turned on.

How do I view and manage blocked emojis for an account?

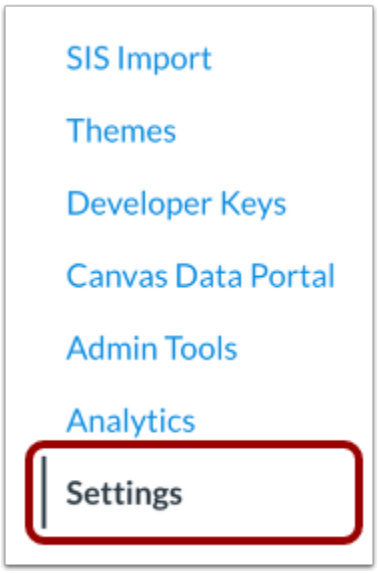
As an admin, you can view and manage emojis available to teachers and students in an account when adding submission comments.

Open Account



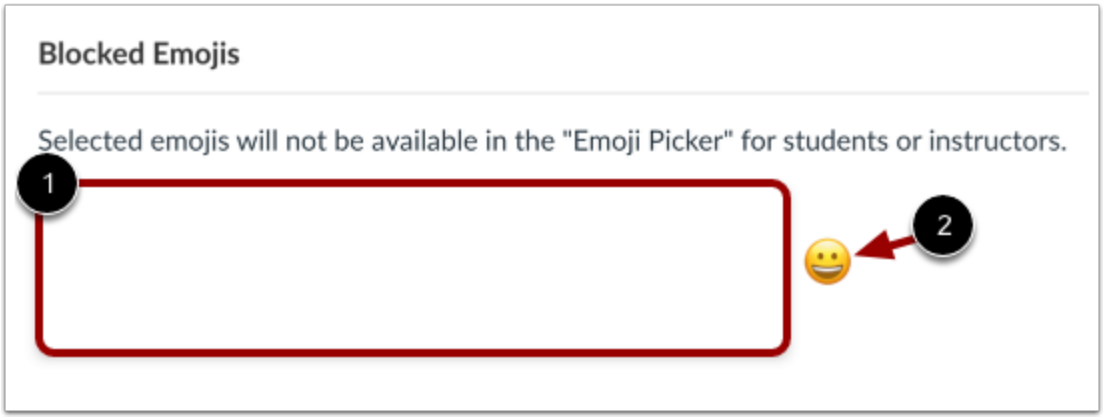
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Settings



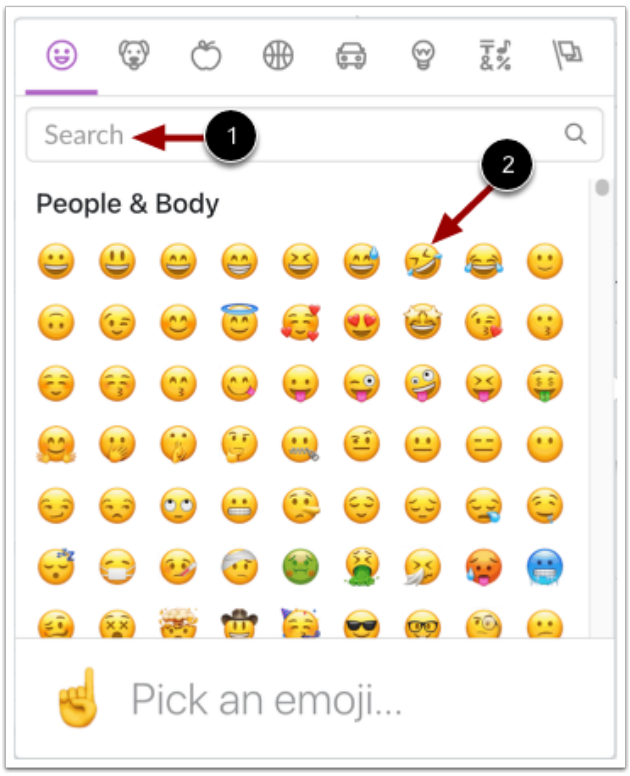
In Account Navigation, click the **Settings** link.

Managed Blocked Emojis



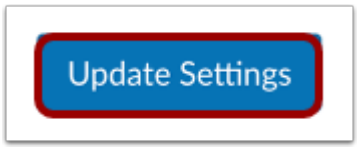
Blocked account emojis display in the **Blocked Emojis** field [1]. To block additional emojis for all account users, click the **Emoji** icon [2].

Select Emoji



To locate an emoji to block, type a keyword the **Search** field [1]. To block an emoji, click the emoji [2].

Update Settings



To save your changes, click the **Update Settings** button.

How do I manage the Content Security Policy for an account?

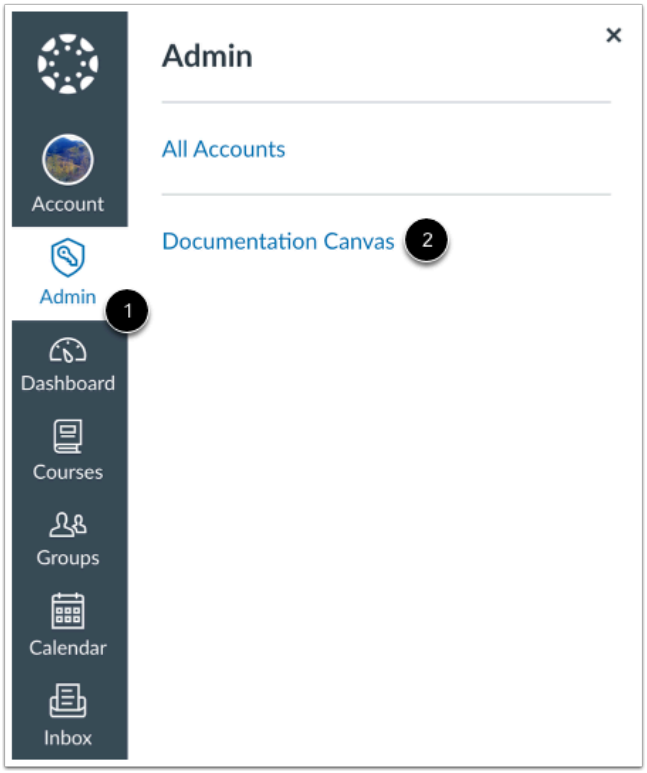
You can enable and manage the Content Security Policy from the Security tab in your Account Settings. The Content Security Policy allows you to restrict custom JavaScript that runs in your instance of Canvas. You can manually add up to 50 domains to your allowed domains. Using wild cards is recommended (e.g. *.instructure.com). Canvas and Instructure domains are included in allowed domains automatically and do not count against your 50 domain limit. Additionally, any LTI tools added in your account are automatically added to allowed domains and do not count against your 50 domain limit.

When enabled in an account or sub-account, the Content Security Policy is automatically enabled for all courses within the account or sub-account. Administrators can manually disable the policy for individual courses.

Sub-accounts have three options for managing the Content Security Policy. Sub-accounts can choose to disable the Content Security Policy, which disables the policy for the sub-account, enable the Content Security Policy at the sub-account level, which only includes domains which have been allowed for the sub-account, or inherit the Content Security Policy from the parent account level. Inheriting the policy will inherit any allowed domains from the parent account level. Sub-accounts are set to inherit by default.

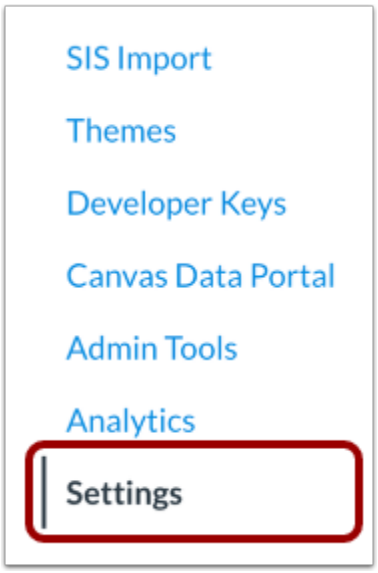
Note: The Security tab only displays in Account Settings if you have enabled the Content Security Policy feature option.

Open Account



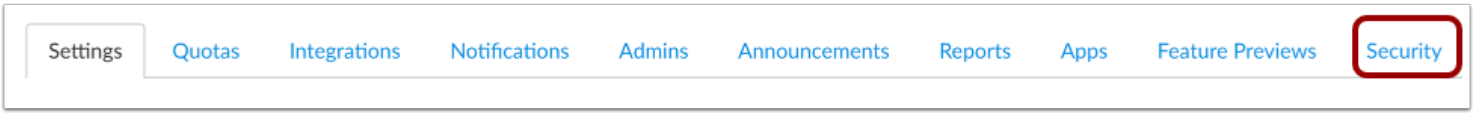
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Settings



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

Open Security Tab



Click the **Security** tab.

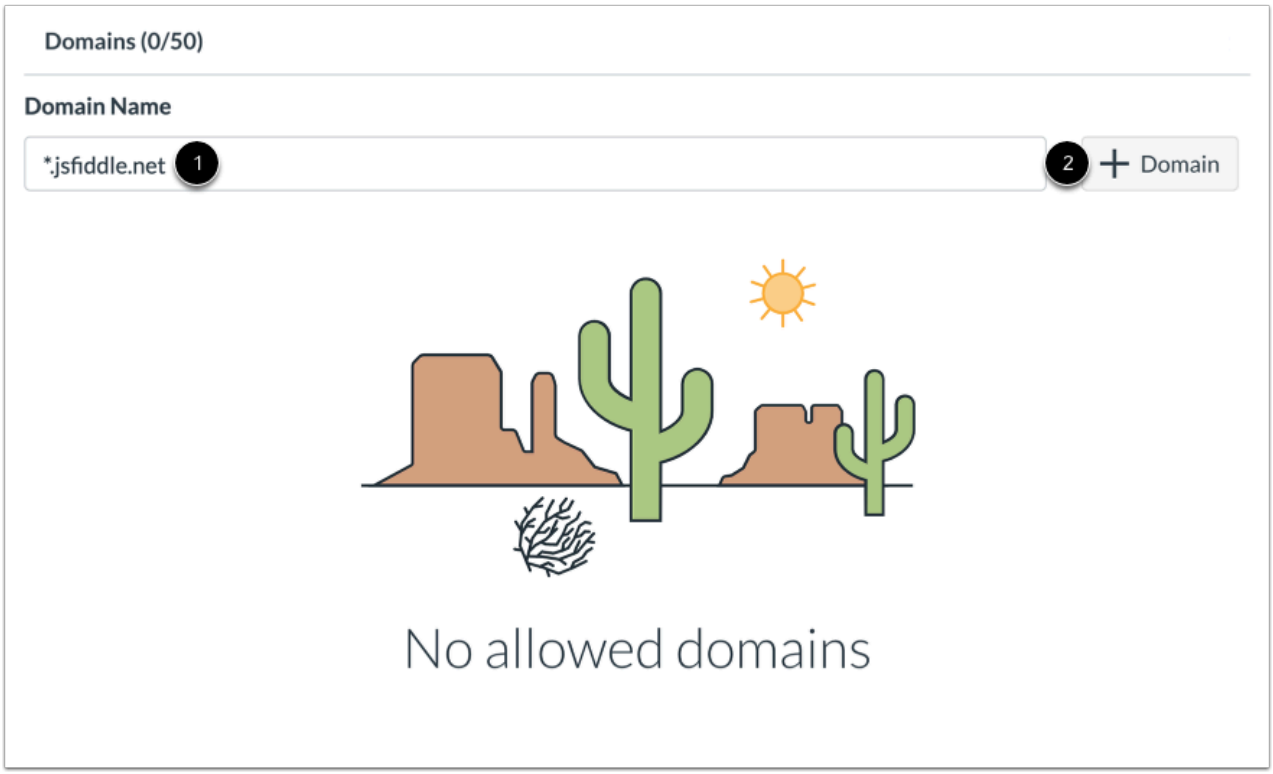
Note: The Security tab only displays in Account Settings if you have enabled the Content Security Policy feature option.

Enable Content Security Policy



To enable the Content Security Policy for an account, click the **Enable Content Security Policy** toggle.

Add Domain to Allowed Domains

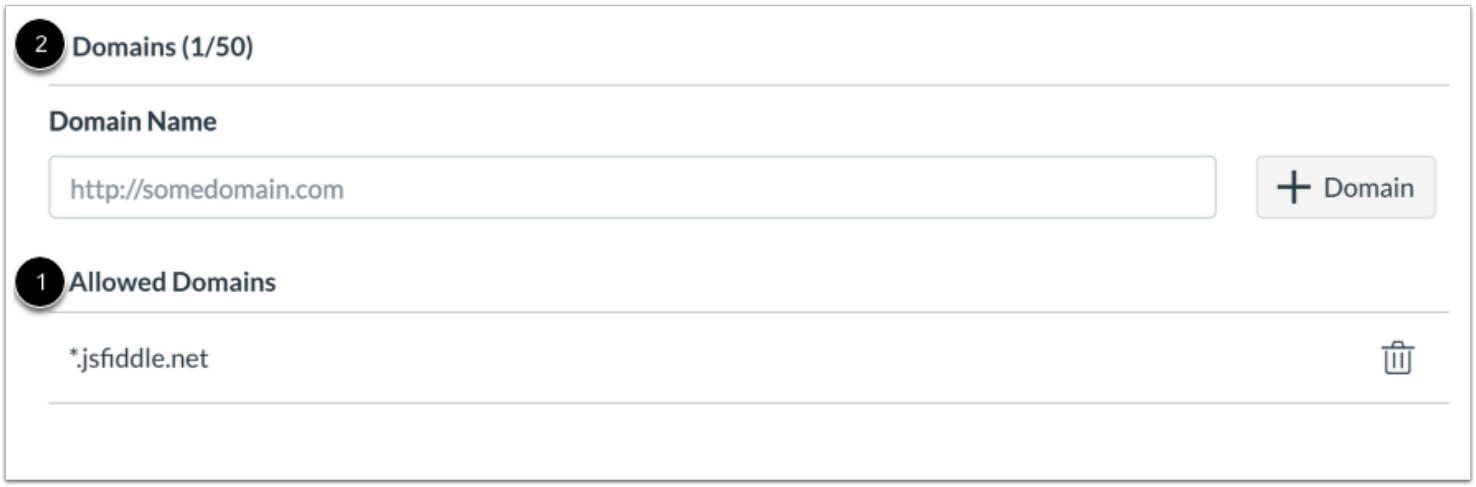


To add a domain to your allowed domains, type the domain name in the Domain Name field [1].

Click the **Add Domain** button [2].

Note: Wild card domains (e.g., *.instructure.com) are recommended. Wild cards include all subdomains tied to the domain name (e.g., example.instructure.com).

View Allowed Domains



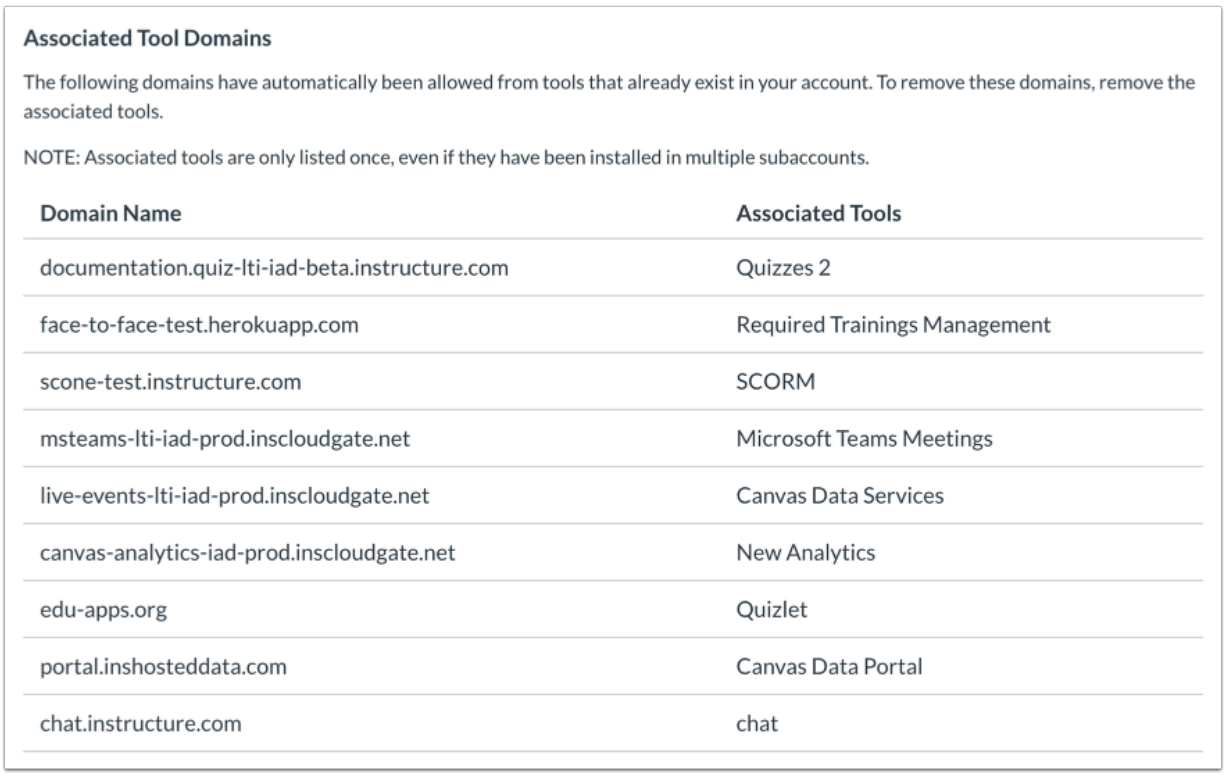
You can view all allowed domains in the Allowed Domains list [1] as well as the number of allowed domains contained in the list [2].

Remove Allowed Domain



To remove a domain from the Allowed Domains list, click the **Delete** icon.

View Associated Tool Domains



Associated Tool Domains

The following domains have automatically been allowed from tools that already exist in your account. To remove these domains, remove the associated tools.

NOTE: Associated tools are only listed once, even if they have been installed in multiple subaccounts.

Domain Name	Associated Tools
documentation.quiz-lti-iad-beta.instructure.com	Quizzes 2
face-to-face-test.herokuapp.com	Required Trainings Management
scone-test.instructure.com	SCORM
msteams-lti-iad-prod.inscloudgate.net	Microsoft Teams Meetings
live-events-lti-iad-prod.inscloudgate.net	Canvas Data Services
canvas-analytics-iad-prod.inscloudgate.net	New Analytics
edu-apps.org	Quizlet
portal.inshosteddata.com	Canvas Data Portal
chat.instructure.com	chat

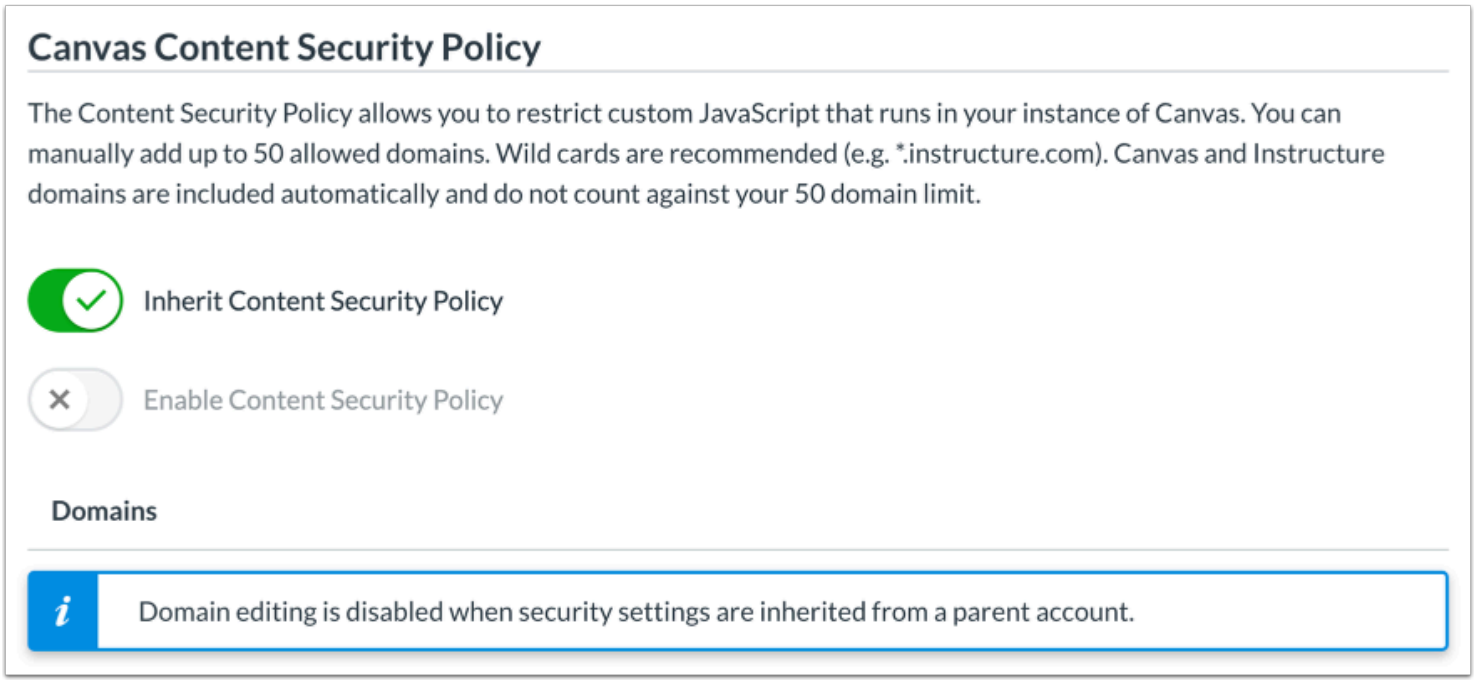
You can view domain names that have automatically been added to your allowed domains in the Associated Tool Domains list.

All Canvas and Instructure domain names are automatically added to allowed domains and do not count against the 50 domain limit. Additionally, LTI tools in your account are also automatically added to allowed domains and do not count against the 50 domain limit.

Notes:

- To remove a domain for an LTI tool, the LTI tool must be removed from the account or sub-account.
- Associated tools are only listed once in the list of associated tool domains, even if they have been installed in multiple sub-accounts.

Manage Sub-Account Content Security Policy

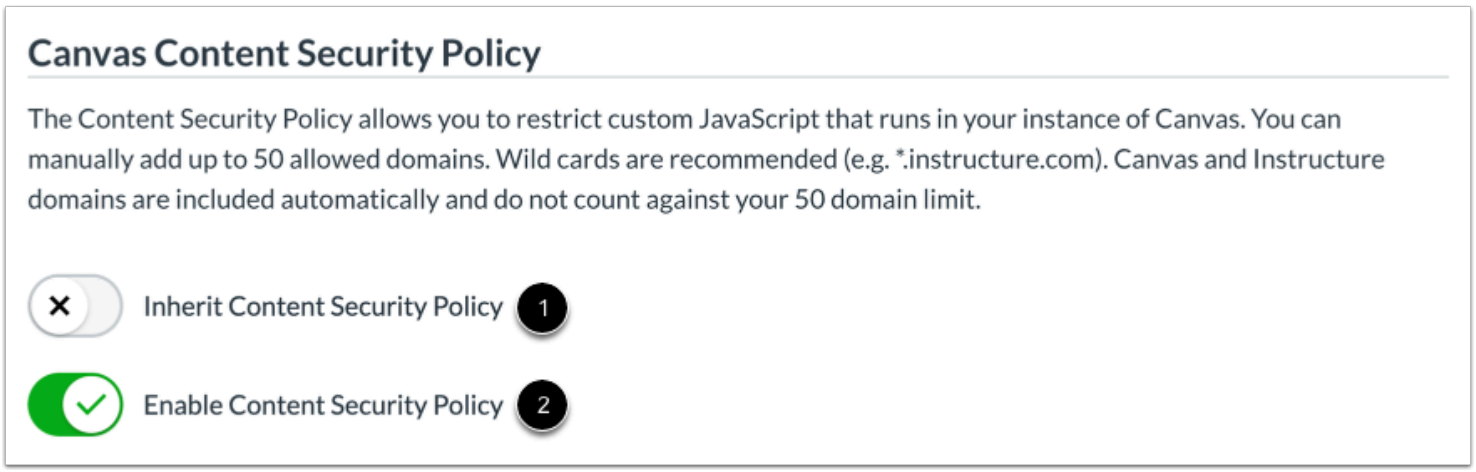


Sub-accounts can manage their own Content Security Policy or choose to inherit the policy from a parent account.

By default, sub-accounts are set to inherit the Content Security Policy from the parent account.

Note: When policy settings are inherited from a parent account, domain editing is disabled at the sub-account level.

Enable Content Security Policy



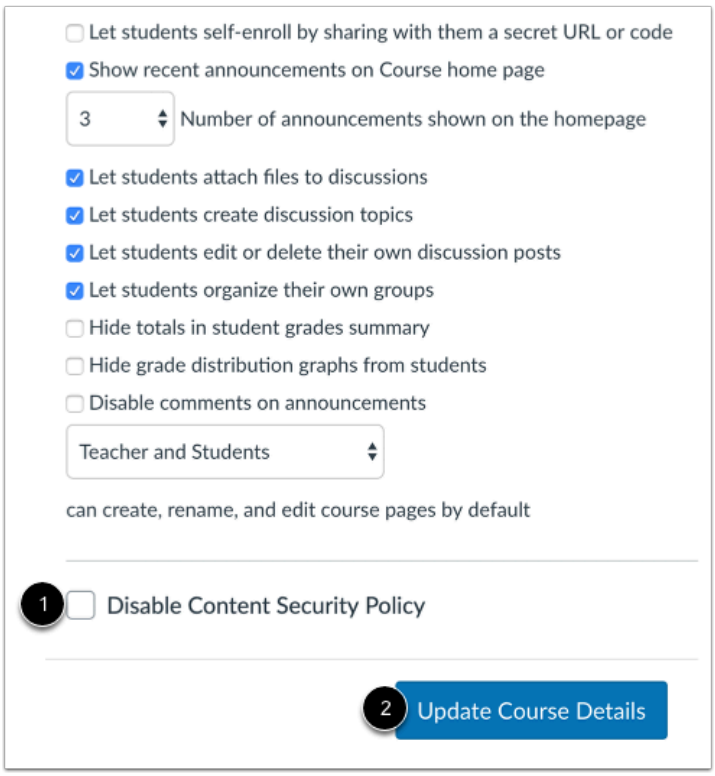
To manage the Content Security Policy from the sub-account level, disable the **Inherit Content Security Policy** toggle [1] and enable the **Enable Content Security Policy** toggle [2].

Disable Content Security Policy



To disable the Content Security Policy for the sub-account, disable the **Enable Content Security Policy** toggle.

Manage Individual Course Settings



The Content Security Policy automatically applies to all courses in the account or sub-account where the policy is enabled.

To disable the Content Security Policy for the course, navigate to the course Settings page and click the **Disable Content Security Policy** checkbox [1].

To save your changes, click the **Update Course Details** button [2].

How do I access the Canvas beta environment as an admin?

The beta environment allows you to explore new features before they reach production. The beta environment is overwritten with data from the production environment every Saturday. Any work or content you add to your beta environment will be overwritten every week.

If you want to keep up on the latest beta features in Canvas, visit the Release Notes page in the Canvas Community.

The beta environment is separate from the test environment, which is overwritten with data from the production environment every third Saturday of the month. The test environment allows you to test using your real data without ruining the experience for your users. Learn more about the different Canvas environments.

Notes about the Beta Environment:

- All users can access the Canvas beta environment, but students cannot access course content beyond the Dashboard; if you want to allow students to view all course content, please contact your Customer Success Manager.
- Notifications, including course invitations and report downloads, cannot be sent in the beta environment.
- Canvas DocViewer can be used in the beta environment, but new and updated DocViewer features are not available for testing.
- Canvas Commons can be used in the beta environment, but new and updated Commons features are not available for testing.
- New Quizzes can be used in the beta environment, but reports, statistics, item bank search, and item bank tagging are not currently supported. Outcomes added to Canvas in the beta environment after the beta refresh will not display in the New Quizzes beta environment.
- Any changes you want to keep in the beta environment must be made directly within the production environment before beta is reset.
- LTI tools (External Apps) are typically not available outside the production environment. LTI tools may display in the beta environment, but often they are only configured for the production environment. Using production-configured LTI tools in the beta environment will affect live data. If you have permission to edit LTI tools, you can confirm the configuration for a specific LTI tool in your course or account. Please contact your Customer Success Manager for specific questions.
- Account-level user page views always reflect activity from the production environment.
- Feature option settings are not copied from the production environment. Feature options must be managed individually in the beta environment.
- Viewing your recent Canvas course page view history is not supported in the Canvas beta environment.

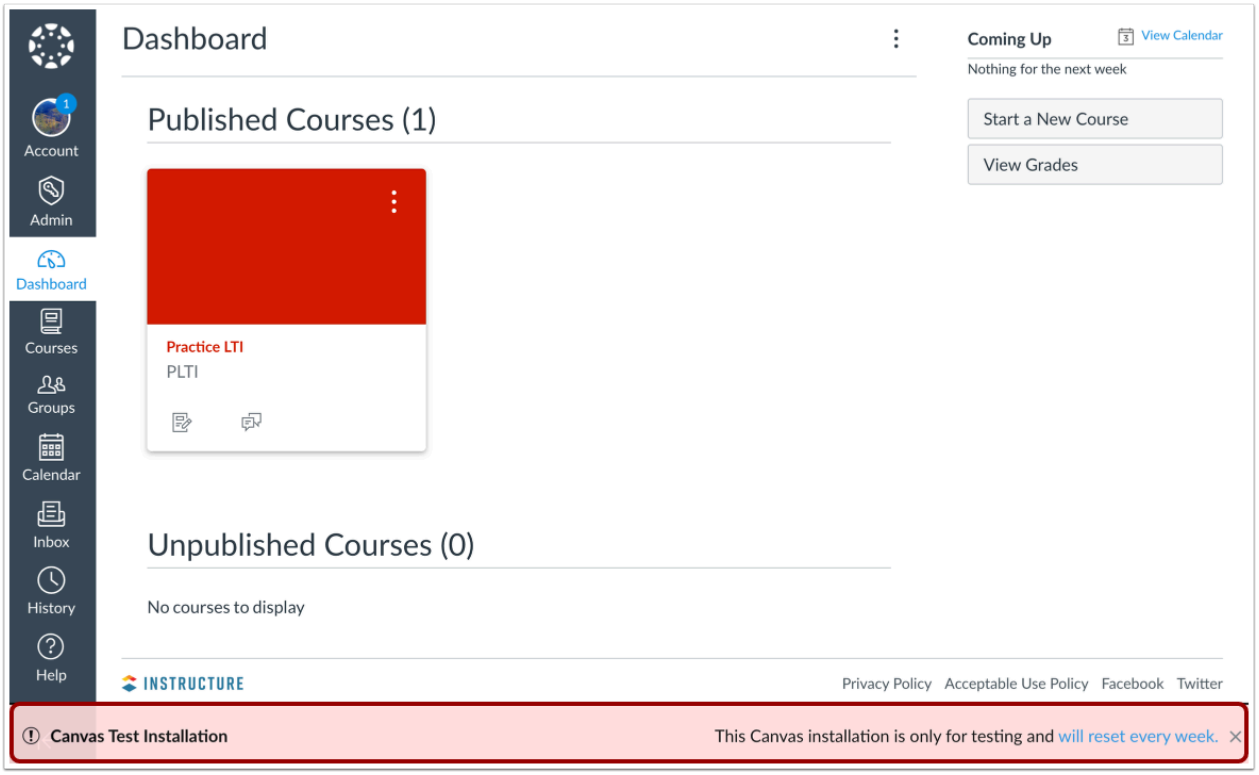
Open Account

Access Beta Environment



To log in to your beta environment, type **[organization name].beta.instructure.com** into the URL field.

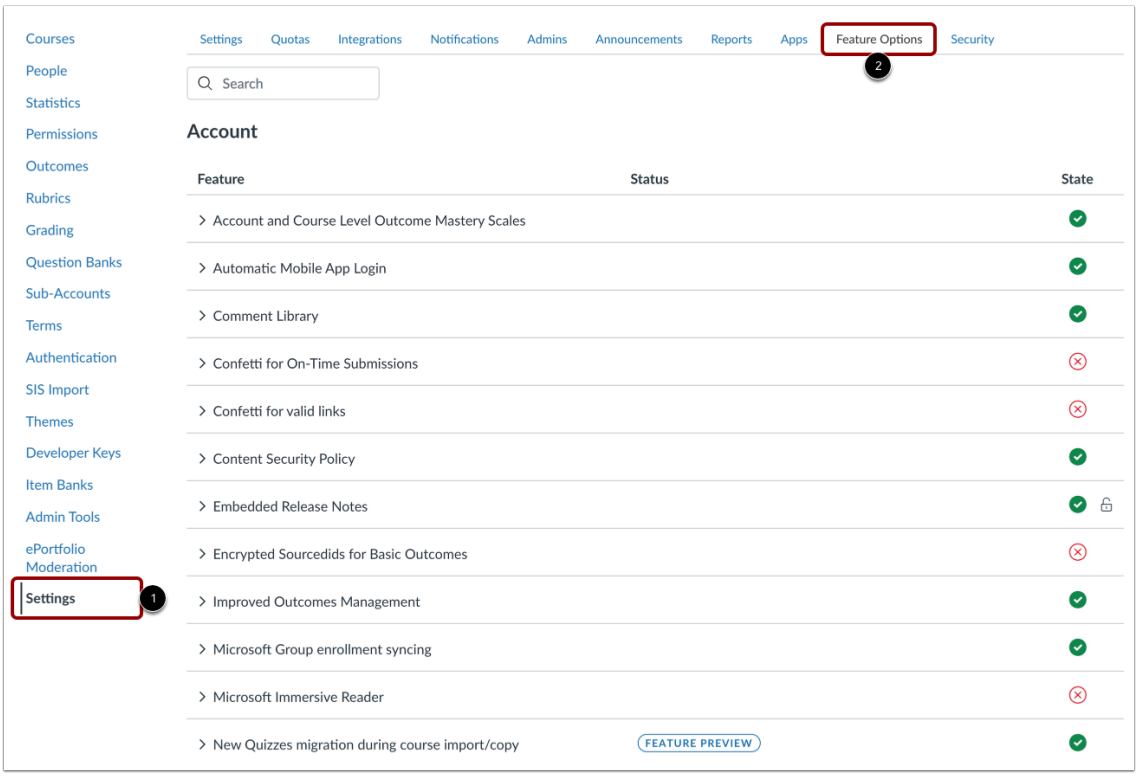
View Test Installation Message



Users in the beta environment will see the Test Installation 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 Test Installation bar, click the close icon.

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 by clicking the **Settings** link [1] and clicking the **Feature Options** tab [2].

How do I access the Canvas test environment as an admin?

The test environment may not be available at your institution. If you cannot access the test environment at your institution, consider using the beta environment for testing purposes.

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 inherits new and updated features added to the production environment on Monday after the production release. You can configure your test environment with production-ready features, such as access to your institution's login authentication system.

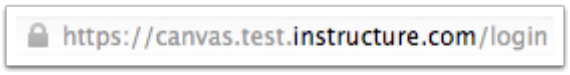
If you want to keep up on the latest production features in Canvas, visit the Release Notes page in the Canvas Community.

The test environment is separate from the beta environment, which is overwritten with data from the production environment every week. The beta environment allows you to explore new features before they reach production. Learn more about the different Canvas environments.

Notes about the Test Environment:

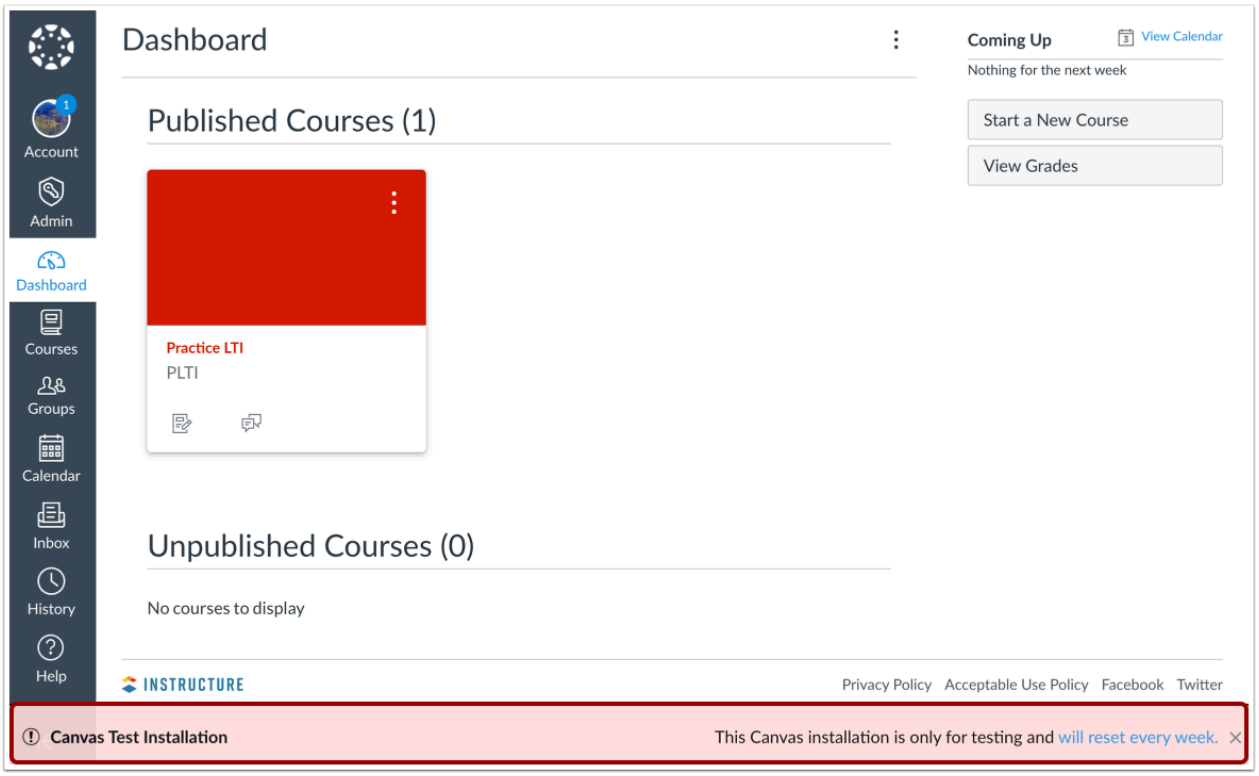
- All users can access the Canvas test environment, but students cannot access course content beyond the Dashboard; if you are an admin and want to allow students to view all course content, please contact your Customer Success Manager.
- Notifications, including course invitations and report downloads, cannot be sent in the test environment.
- New Quizzes is not supported in the Canvas test environment.
- Any changes you want to keep in the test environment must be made directly within the production environment in order to affect live data.
- LTI tools (External Apps) are typically not available in the outside the production environment. LTI tools may display in the test environment, but often they are only configured for the production environment. Using production-configured LTI tools in the beta environment will affect live data. If you have permission to edit LTI tools, you can confirm the configuration for a specific LTI tool in your course or account. Please contact your Customer Success Manager for specific questions.
- Account-level user page views always reflect activity from the production environment.
- Feature option settings are never copied from production and always retain their default settings. Feature options must be managed individually in the test environment.
- Viewing your recent Canvas course page view history is not supported in the Canvas test environment.

Access Your Test Environment



To log into your test environment, type **[organization name].test.instructure.com** into the URL field.

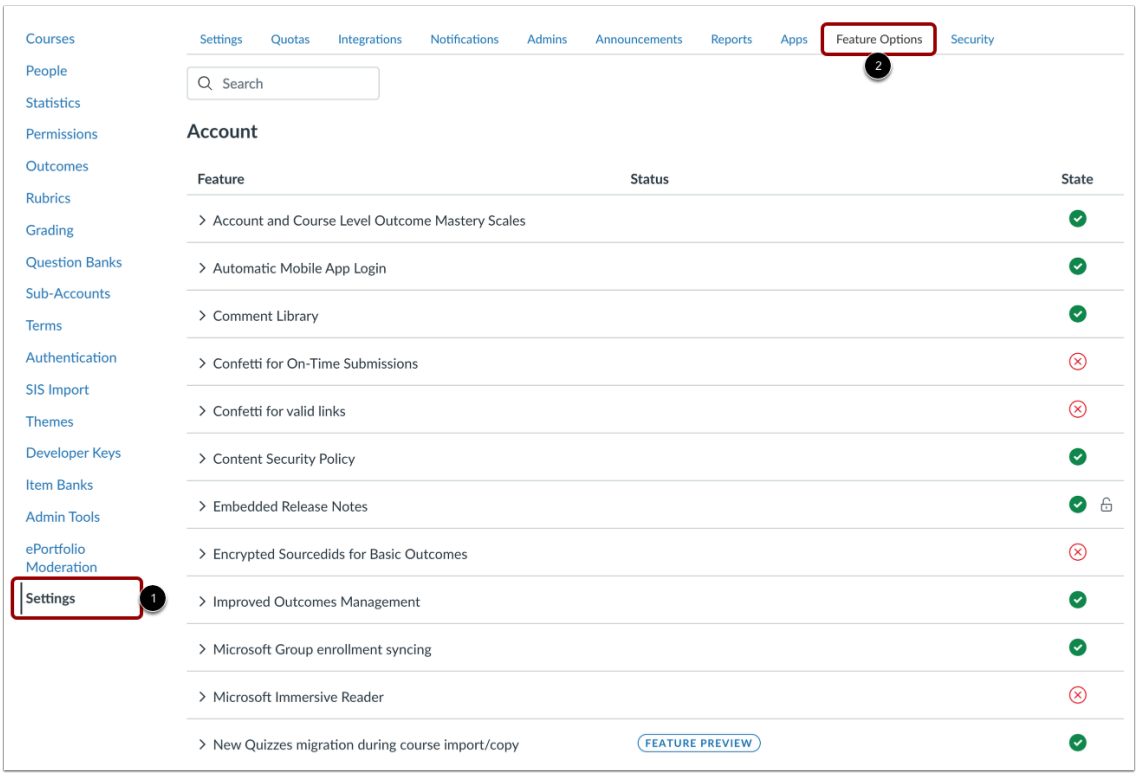
View Test Installation Message



Users in the test environment will see the Test Installation bar across the bottom of the screen indicating the user is in a Canvas Test Installation. Test environments are reset every month 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 Test Installation bar, click the close icon.

Manage Canvas Features

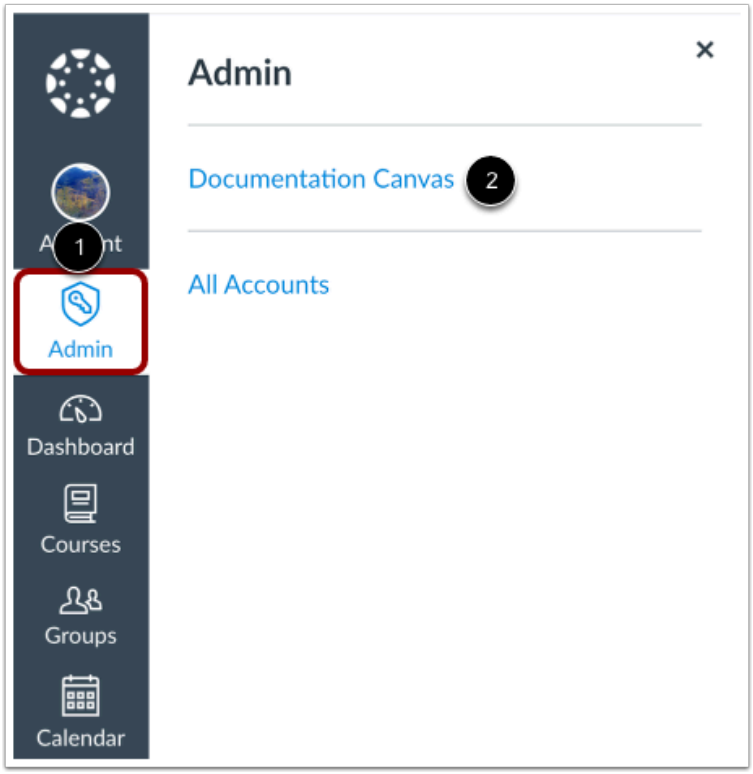


Some new features may be released as opt-in only and will not appear until you enable them in your test environment. You can view these features by clicking the **Settings** link [1] and clicking the **Feature Options** tab [2].

How do I enable Canvas for Elementary in my sub-account?

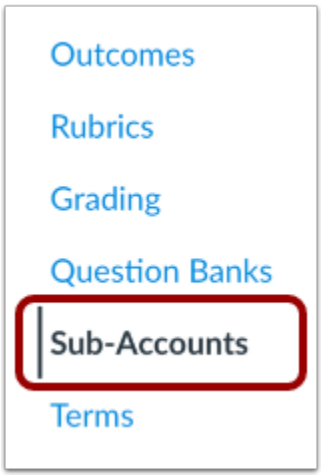
You can enable Canvas for Elementary using the Canvas for Elementary setting in your sub-account.

Open Account



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

Open Sub-Accounts



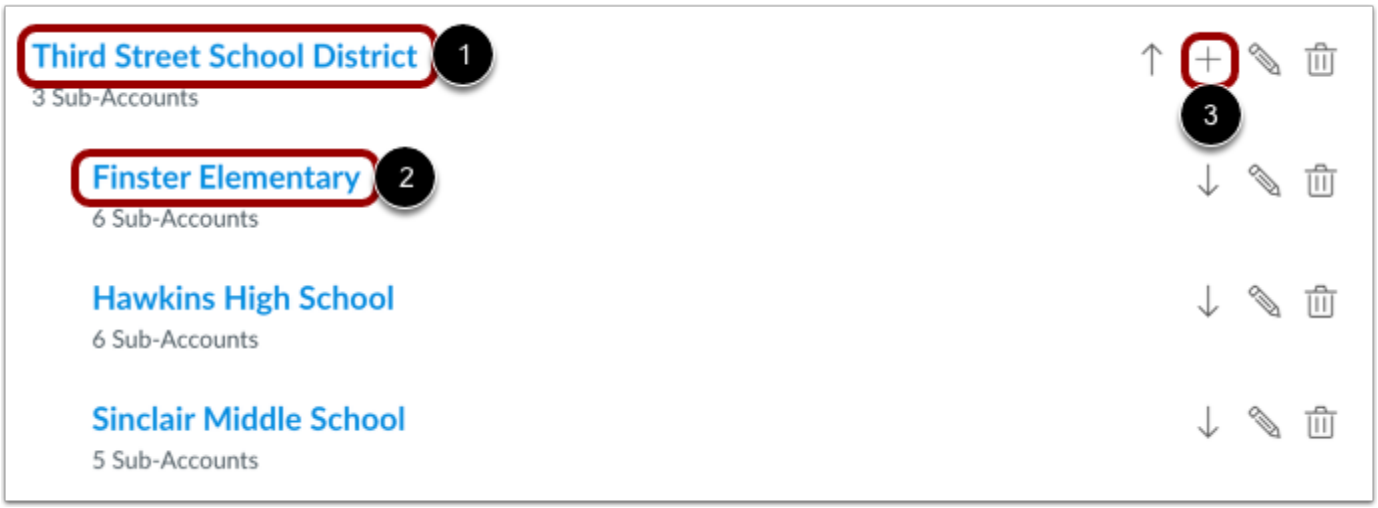
In Account Navigation, click the **Sub-Accounts** link.

Show Accounts



To display all sub-accounts, click the **Down Arrow** icon.

Open Sub-Account



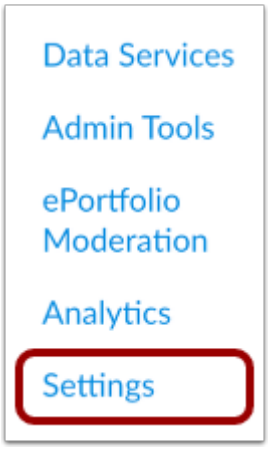
Open the sub-account in which you'd like to enable the Canvas for Elementary setting.

To enable the setting in the main sub-account and subsequent sub-accounts, click the main sub-account name [1].

To enable the setting in a single sub-account, click the sub-account name [2].

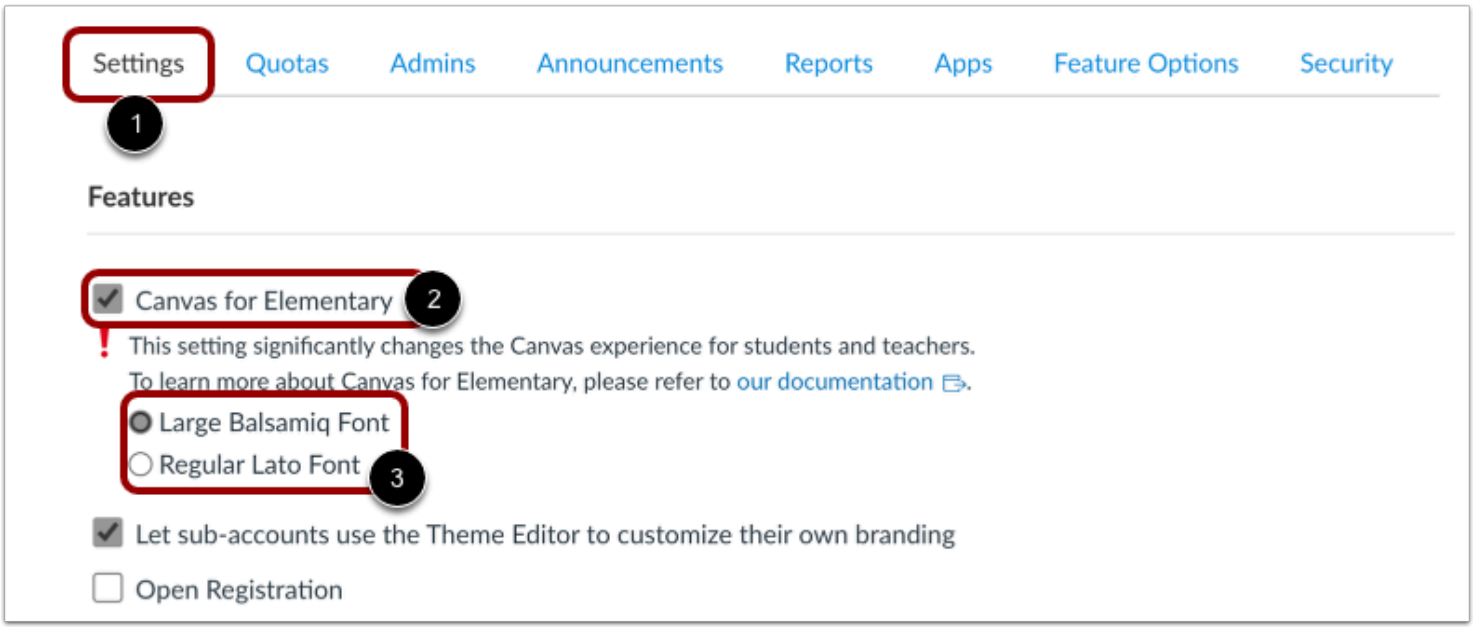
To create a new sub-account, click the **Add** icon [3].

Open Settings



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

Enable Setting



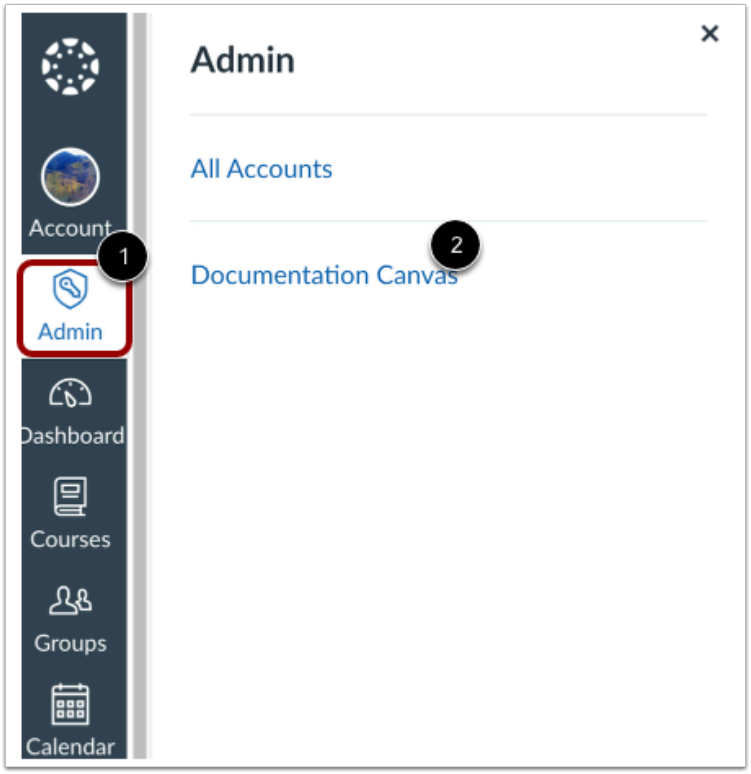
In the Settings tab [1], enable the Canvas for Elementary setting by clicking the **Canvas for Elementary** checkbox [2].

When enabling Canvas for Elementary, you can select whether to have large balsamiq font or regular lato font [3].

How do I enable Differentiation Tags for an account?

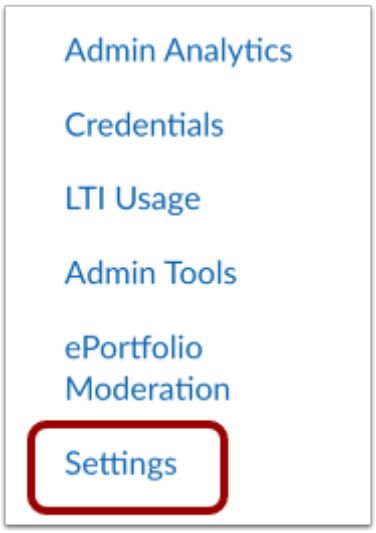
You can enable Differentiation Tags setting at the account level or sub-account level. This setting can also be locked for sub-accounts.

Open Account



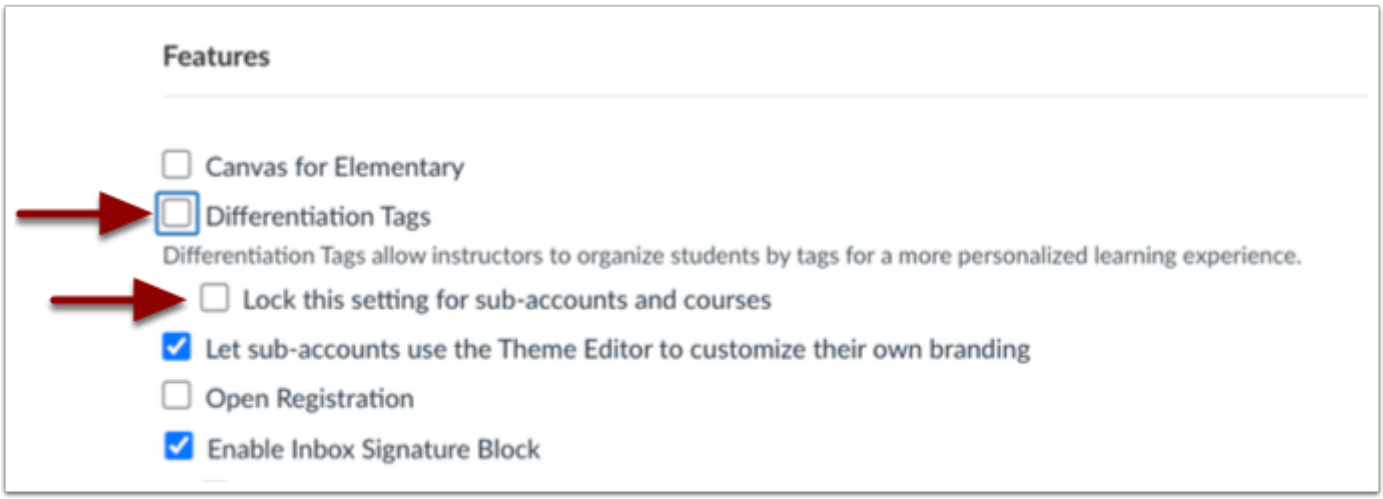
In Global Navigation, click the **Admin** link [1], then click the name of the account [2].

Open Settings



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

Enable Setting



In Account Settings, click the **Differentiation Tags** checkbox to enable the feature. To prevent sub-accounts and courses from changing this feature, click the **Lock this setting for sub-accounts and courses** checkbox.

How do I manage API access tokens for a user as an admin?

As an admin, you can limit the generation of access tokens with the Users-Manage Access Token admin permission. The Users-manage Access Tokens permission is required when managing access tokens.

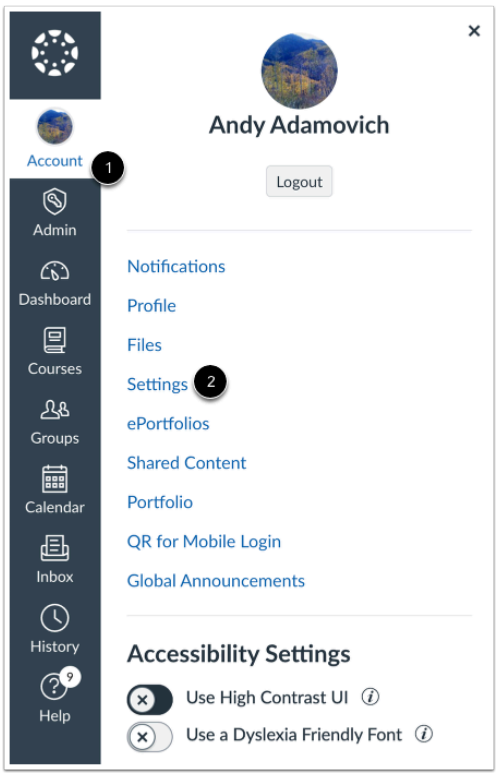
This feature benefits users by enhancing security and control over access tokens. By limiting token generation to admins, it reduces the risk of unauthorized token creation, helping to prevent potential misuse or security breaches.

You can also manage API access tokens from your User Settings. Access tokens can be generated automatically for third-party applications or created manually.

Notes:

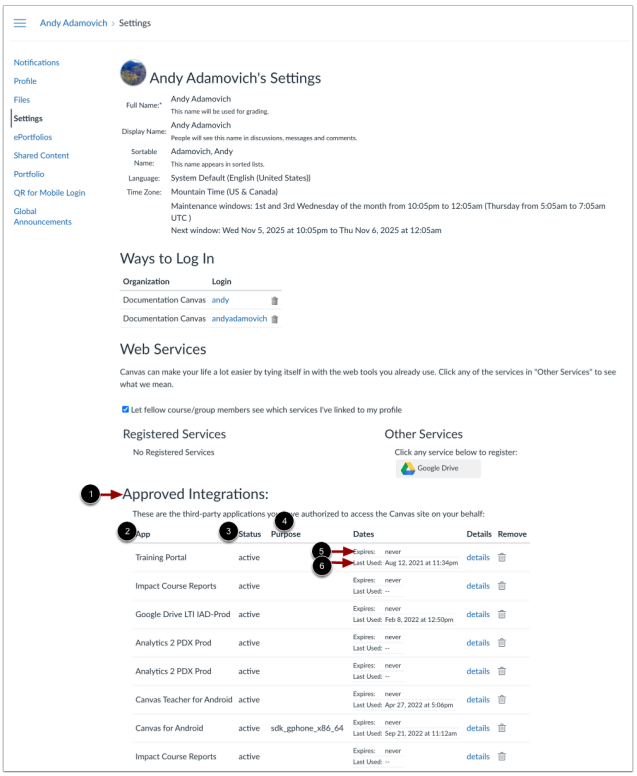
- For all API keys, it is best to assign a single, clearly defined purpose. This helps ensure you can identify which API user is performing specific actions and makes it easier to remove keys that are no longer needed.
- User Access Tokens are required to have a defined purpose, regardless of which user creates them.
- To minimize security risk if a token is compromised, expiration dates are now required for all User Access Tokens created by users with only student roles (maximum expiration date as 120 days). This requirement will also be applied to all previously created tokens for users with only student roles.

Open Account



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

View Access Tokens

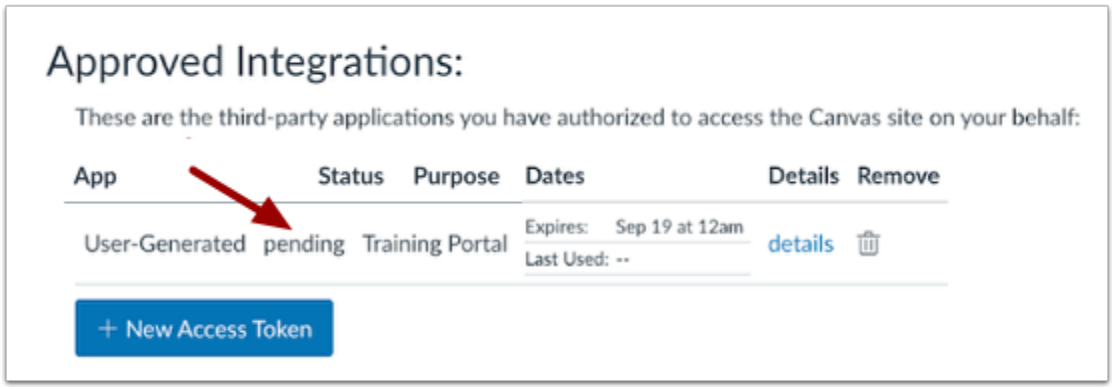


Third-party applications with access tokens and user-generated access tokens are listed in the Approved Integrations section [1].

For each access token, you can view the name [2], status [3], purpose [4], expiration date [5], and date of last use [6].

Note: Mobile access tokens are generated for you when you log in to a Canvas mobile app and never expire. To remove access for a mobile application, the access token must be deleted.

View Token Status

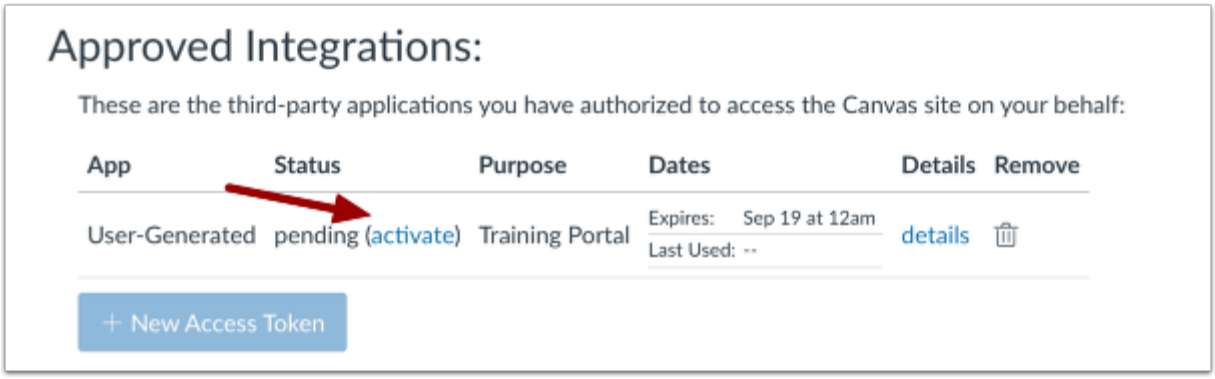


As an admin, If you have both the Users - Manage Access Tokens permission and the Users - act as permission, you can masquerade as a user to generate a token on the user's behalf. This updates the status to **Pending** which prevents unauthorized token generation without the user's knowledge. The access token should then be securely shared with the user by the admin. Additionally, as an admin, you can masquerade as a user to delete that user's existing access tokens and regenerate tokens.

Notes:

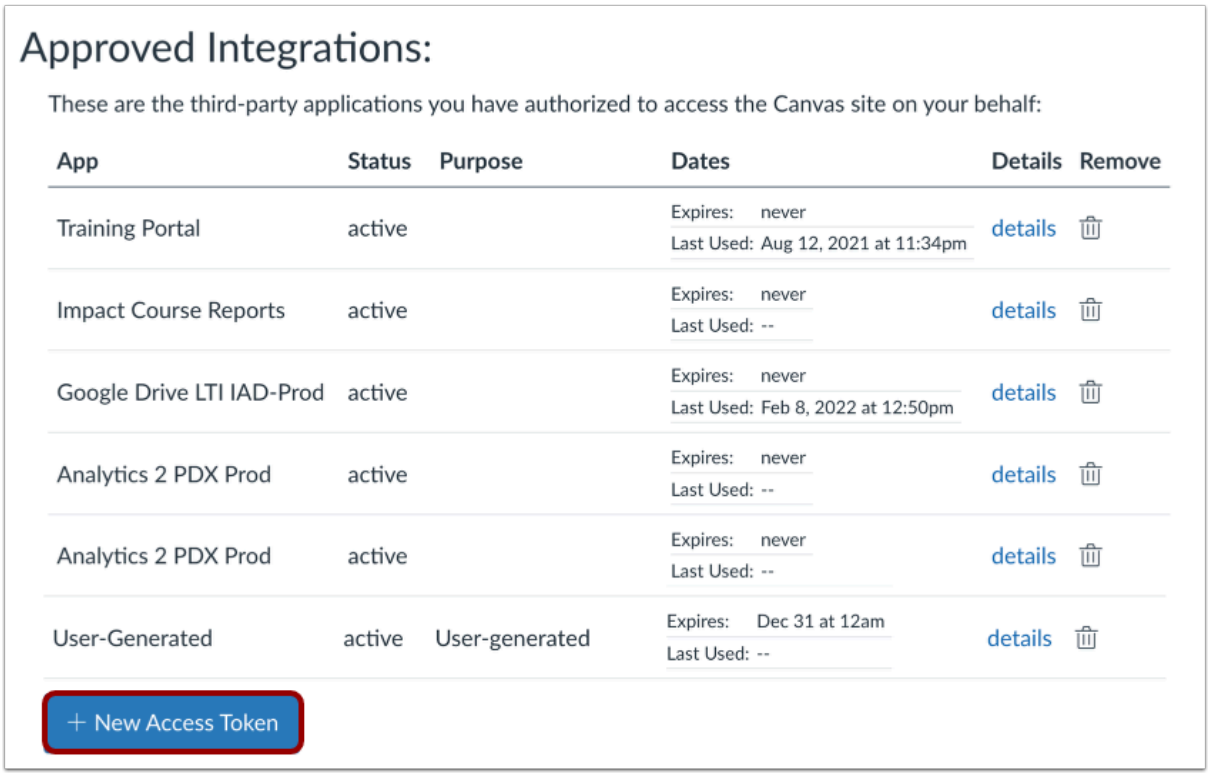
- Regenerating an existing access token on behalf of a user will place the token in a pending state, similar to newly generated tokens. The user must activate the token before it can be used. The access token should be securely shared with the user by the admin.
- Tokens generated by an admin on behalf of a user will remain in a pending state until the user navigates to their user settings and activates the token.
- Users will receive an email notification if an access token has been generated on their behalf.

View Token Status Activate Link



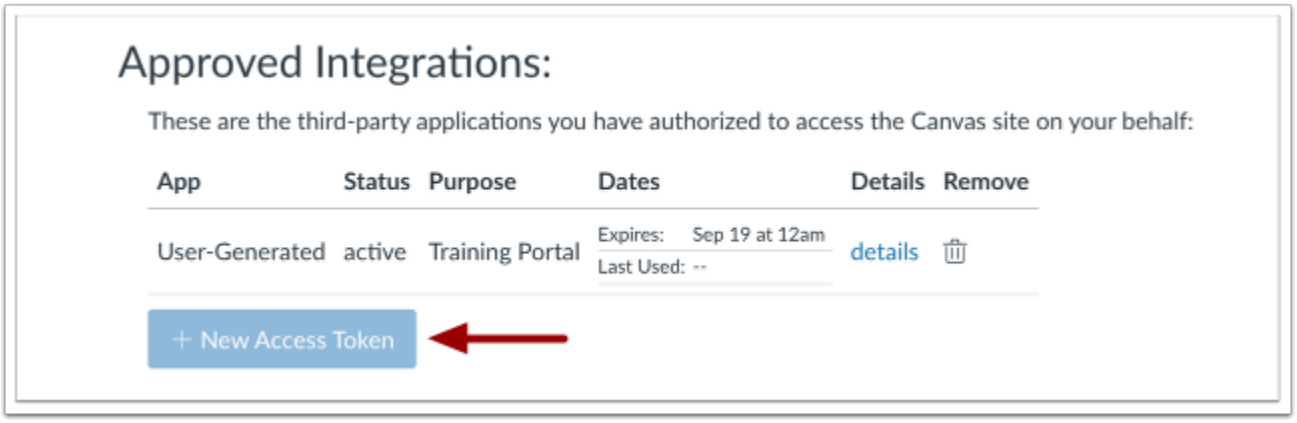
When you generate a token on behalf of a user, the user must click the **Activate** link. This changes the status to **Pending (Activating)**. Afterward, the user should refresh the screen to see the updated status as **Active**.

Add Access Token



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

Disabled Add New Access Token Button



When users do not have the Users-manage Access Tokens permission, the Add New Access Token button is disabled or if generating access codes is limited to admins.

Note: Existing personal tokens are not removed, but unauthorized users are unable to regenerate them.

SIS Imports

What student information system (SIS) integrations are available in Canvas?

Instructure supports integrations with several student information systems (SIS). These integrations may require an SFTP configuration, or they may use APIs made available from LIS, SIF 2.0, and OneRoster 1.1 to share information between the SIS and Canvas. Learn more about Canvas SIS integrations.

Most Canvas SIS integrations work bi-directionally:

- **SIS to Canvas Provisioning:** SIS rostering changes (updates to users, courses, enrollments, etc.) sync to Canvas via one-way data transfer from the SIS to Canvas. Rostering sync schedules are configured upon implementation and can be managed by admins.
- **Canvas to SIS Grade Passback (GPB):** Canvas assignment and gradebook updates sync to SIS gradebooks via one-way data transfer from Canvas to the SIS. Instructors can manually sync grades from Canvas to the SIS. Institutions can also configure automated grade sync schedules upon implementation.

For more information about SIS integrations, view the Canvas Student Information Systems guides. You can also visit the Canvas Community Admin Group.

Note: If your institution's SIS is not included in the list of Instructure-supported integrations, you may be able to configure a Canvas SIS integration. For more information about configuring a Canvas-SIS integration, contact your SIS provider.

Instructure Supported SIS Integrations

Instructure supports Canvas integrations with the following Student Information Systems:

- Aeries
- Aspen
- Aspire
- Blackbaud
- Classlink *
- Focus
- Infinite Campus
- PeopleSoft (Oracle)
- Pinnacle (Wazzle)
- PowerSchool
- ProgressBook (DASL)
- Q (Mistar/Aequitas)
- Qmlativ (Skyward)
- Sapphire

- SchoolTool
- Skyward (SMS)
- Sunet LMS *
- Synergy

** This integration does not currently support grade passback (GPB).*

Other SIS Integrations

If your institution's SIS provider is not listed above as an Instructure Supported integration, your SIS provider may support an integration with Canvas. For more information, please contact your SIS provider.

Alternatively, you can utilize the SIS Import Tool to bulk-upload your institution's SIS data to Canvas. Learn more about Canvas SIS Import Format Documentation and Canvas API documentation.

How do I import SIS data to a Canvas account?

SIS data can be uploaded through the SIS Imports link in Account Settings. SIS data is only accessible at the account level and cannot be added to sub-accounts.

The SIS Import page supports a few formats for standard imports to Canvas: Instructure formatted CSV file or a zip file of CSV files, IMS Enterprise Specification XML zip, or Banner Grade Exchange Results XML. Files can be set for a full batch update and to override UI changes.

Please ensure you are aware of the risks associated with these upload options. For more details about these risks, please view the SIS Imports lesson.

API Processing

SIS Imports are added to a queue that processes each imported CSV separately (whether uploaded individually or within a ZIP file). Import errors are displayed in the SIS Import page.

API Practice

Before importing SIS information, practice using the API to manage SIS data. You should also use your test environment to avoid conflicts with your live production data. Once you have confirmed your data in your test environment, you can re-apply your SIS integration to your production environment. Additionally, some SIS data options are only available via the API.

Notes:

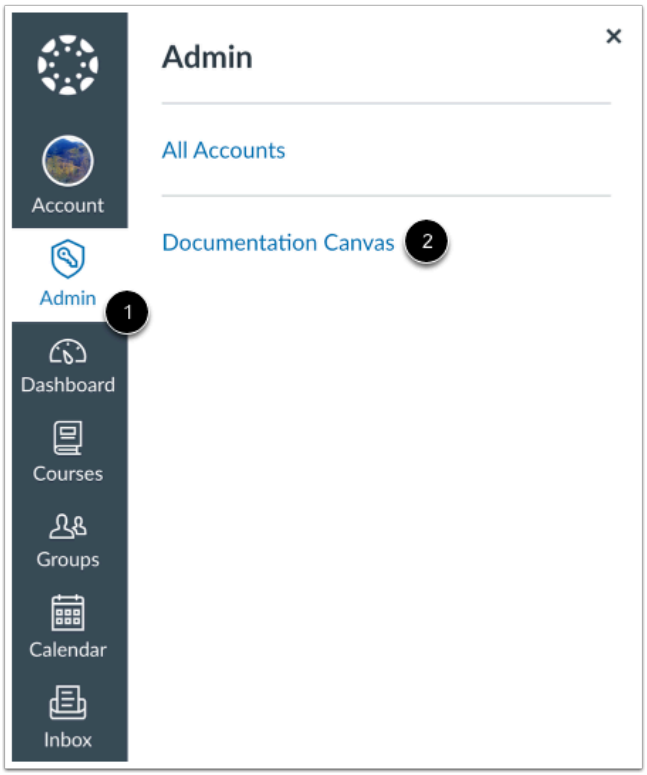
- SIS Imports must be enabled by your Customer Success Manager before files can be uploaded to your account.
- Importing SIS files is an account permission. If you do not have access to manage SIS files, your institution has restricted this feature.
- Before setting permission for a user role, you must ensure the role you want to assign the user already exists in your account. Learn how to create an account-level role.

Troubleshooting Tip: Certain fields become "sticky" when information is modified directly by a user or administrator. Stickiness prevents automatic changes via a SIS Import. If changes do not occur after importing SIS data, users may have made changes through the user interface (UI). You can override changes using the Override UI changes option.

If you use an automated system to import data from a SIS, you may want to restrict users from editing their name directly in Canvas. To prevent users from modifying their own names, de-select the **Users can edit their name** option in account settings.

You can see a full list of fields that may become sticky on the SIS Import API page.

Open Account



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

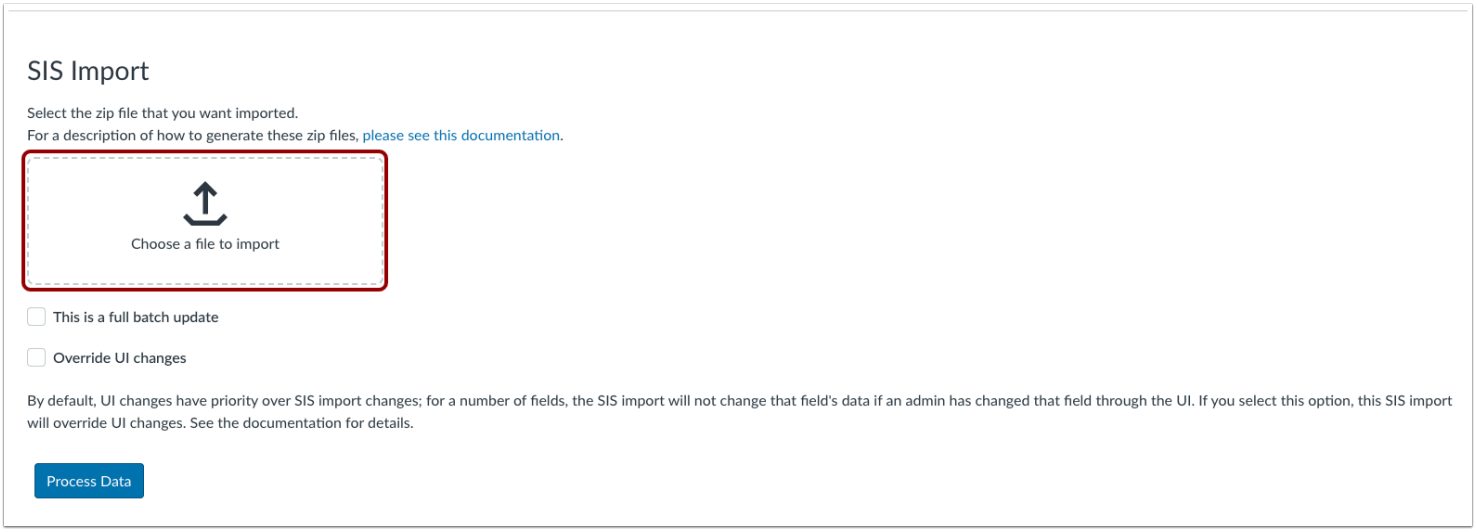
Open Account

Open SIS Import



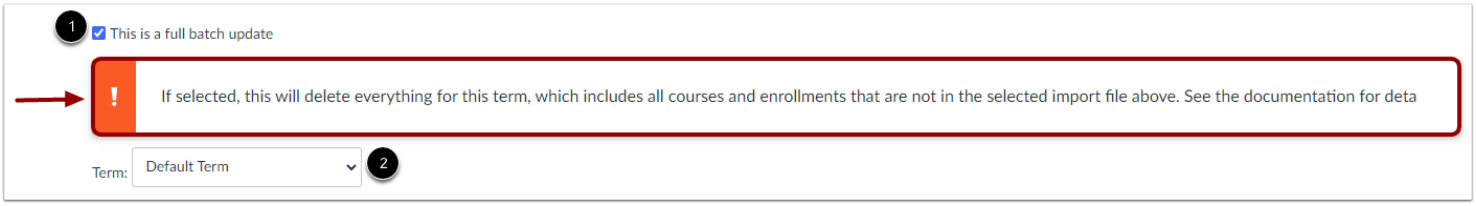
In Account Navigation, click the **SIS Import** link.

Select File



Click the **Choose a file to import** button and locate the SIS import file from your computer.

Set Full Batch Update



If you want to create a full batch update, select the **This is a full batch update** checkbox [1]. A warning informs users of the risks associated with selecting the **This is a full batch update** checkbox. In the Term drop-down menu [2], type the term you want to search for, then select it to apply the full batch update. With this option, any courses, sections, or enrollments with a SIS ID record in Canvas that is linked to the Term selected in the drop-down can be deleted. For enrollments, this option means the linked user and course/sections require SIS IDs. A Canvas record will be deleted if it is not included in the current import file.

This option will only affect data created via previous SIS imports. Manually created courses, for example, won't be deleted even if they don't appear in the new SIS import.

Notes:

- Ensure you are aware of the associated risks before selecting this option.
- When importing section CSVs using SIS Imports, existing *integration_id* values are now retained if the *integration_id* column is not included in the import file. To remove an *integration_id*, it must be explicitly unset using the `change_sis_id.csv` file.

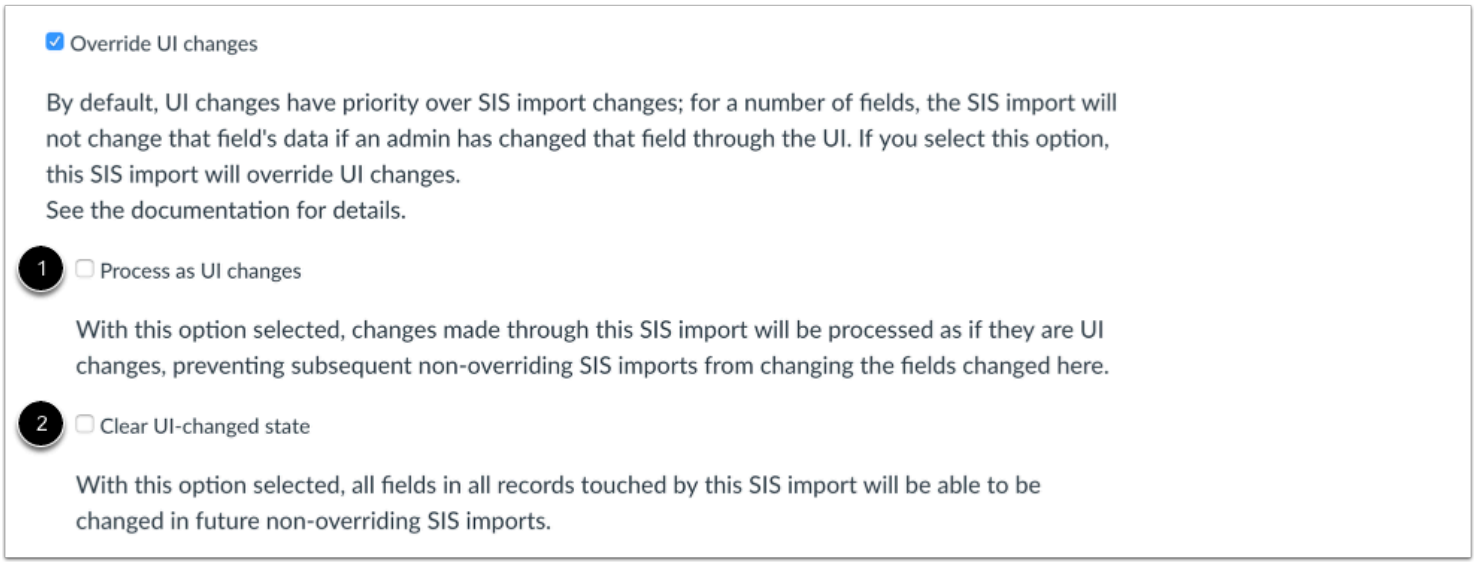
Override UI Changes



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:

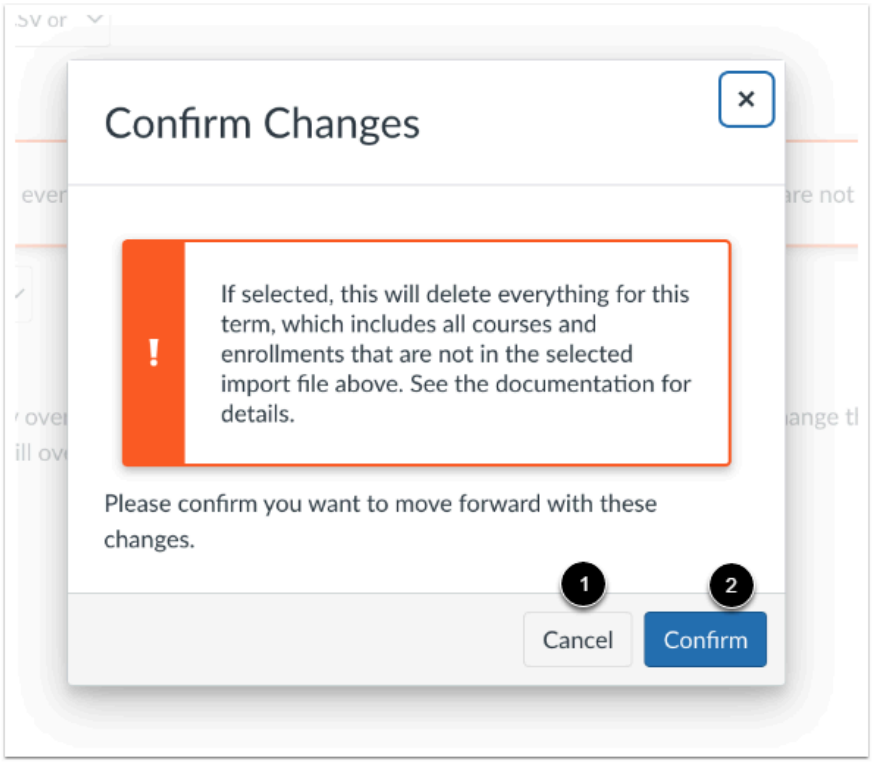
- **Process as UI changes [1]:** overrides changes that have taken place in the UI as "sticky" data; all data acts as if the changes were actually manually updated in the UI
- **Clear UI-changed state [2]**: removes the "stickiness" of all data that exists in this import; future imports with this data will not indicate any data in the UI as "sticky"

Process Data



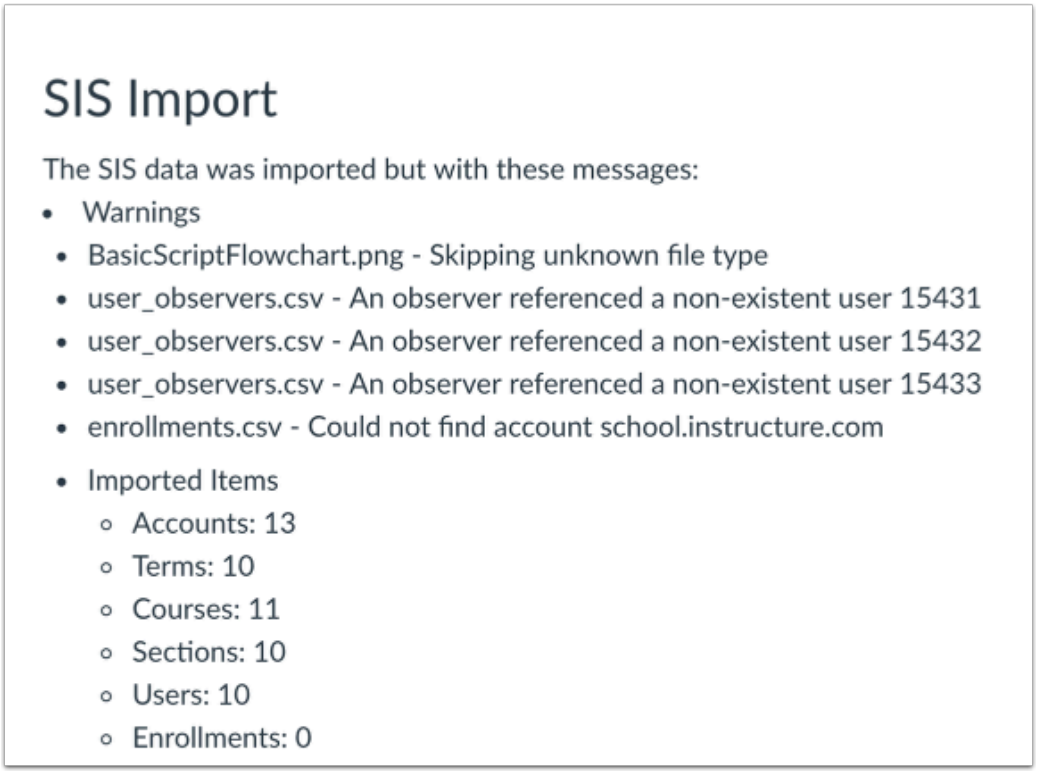
Click the **Process Data** button.

Confirm Changes



After clicking the Process Data button, a confirmation modal displays. Click **Cancel** [1] to stop or **Confirm** [2] to proceed.

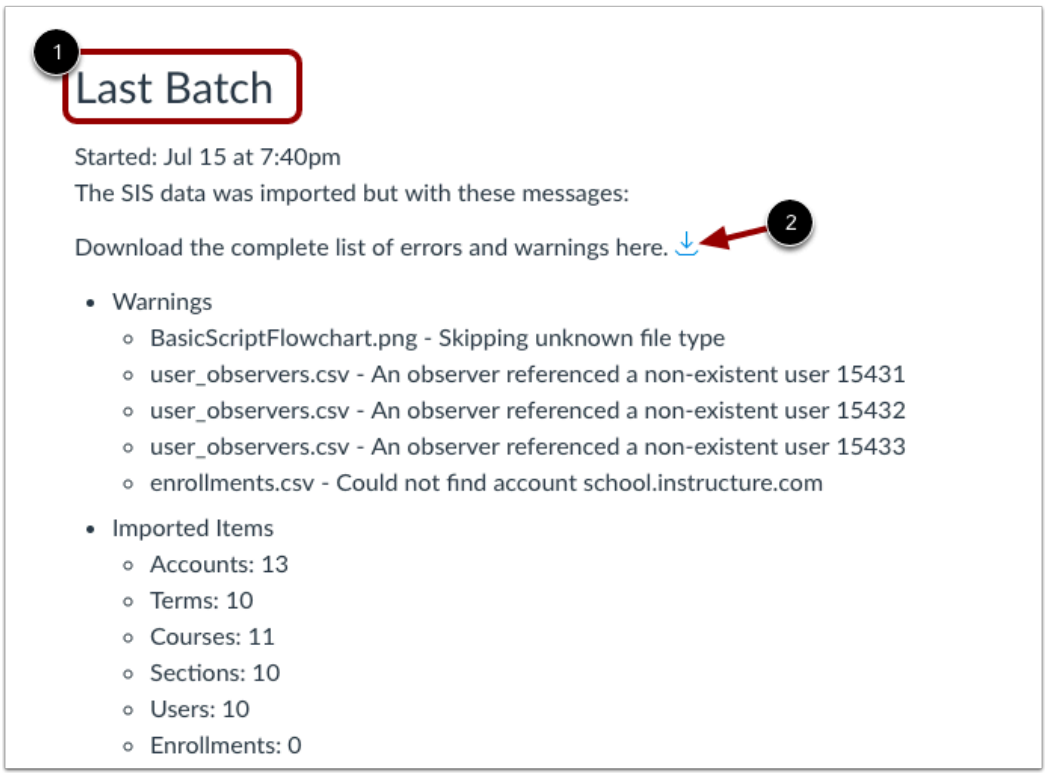
View Import Data



After the import processes, Canvas displays the results of the imported file, along with up to 50 errors and warnings. If you imported a full batch update, the results also show the number of deleted items removed from the account. Deleted items include enrollments, courses, and sections.

After you refresh the page, this information will stay in the SIS Import page under the Last Batch heading until another import is made.

Download Errors



If you want to download all warnings and errors from your last import file, return to the SIS Import page. Under the Last Batch heading [1], click the **Last Batch Download** icon [2]. A CSV file downloads and contains all errors and warnings from your last import.

Note:

- You may need to refresh the page to view the download icon.
- If the report is downloaded, the link expires after an hour. If the page is refreshed, a new URL is generated and active for one hour.

Review Errors

If you find a file has failed, review any error messages that are available to you. Note the following when reviewing errors:

- You may find that the file itself had an error message, or that particular lines in the file failed.
- You can use the SIS Import Errors API for additional troubleshooting details, which will return the CSV line number where the error occurred.

- The CSV requires specific formatting to upload properly. In particular, review the CSV headers. Learn more about formatting CSV files.
- SIS Import CSV files must be encoded in UTF-8 without byte order mark. Most applications automatically encode for UTF-8, though some programs, such as Microsoft Excel, will change to an alternate encoding. If your software is capable of encoding files out of UTF-8, select UTF-8 as an option when saving.
- Certain error messages require you to contact support to review.

How do I format CSV text files for uploading SIS data into a Canvas account?

Canvas allows you to import CSV files to manually bulk create users, accounts, terms, courses, sections, enrollments, and logins 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 works with the others and tells Canvas how to manage information for the account. View the SIS relationship diagram.

Sample Files

Each step in this lesson provides details about the CSV files and descriptions of each required and optional field. Each step also includes a link to download a sample CSV file. Sample files contain all required fields and may also contain optional fields. Additionally, you can download a zipped package of all sample files. If CSV links do not download, try opening the link in a new tab.

You should practice importing data in your Canvas test environment before importing any content to your production environment.

CSV File Format

In order to bulk upload data into Canvas, you must create one or more CSV text files. CSV files can be generated by many programs. Student Information Systems (SIS) often have a method for generating reports in CSV format that can be modified to fit the format Canvas requires. If you do not know how to save a file in a CSV format, please check the documentation for the program you are using to create your CSV file (e.g., Excel).

When using the Instructure format for importing files in the SIS Import page, you may import an individual CSV text file or you may compress multiple files into a single ZIP file to bulk import data. If you are manually uploading individual files, the files must be uploaded in the order shown in this lesson.

CSV Field Formatting

The first row of your CSV file (header) must include the complete field name for each file. The order of the *columns* does not matter but having the *rows* ordered properly is crucial for files like the accounts.csv.

Sticky Fields

By default, certain changes made in the user interface are not overwritten by future SIS imports and are specified as being sticky. All sticky fields are identified in this document. You can override these fields by setting override_sis_stickiness in the API or checking the Override UI changes checkbox in the SIS Import page.

API Documentation

CSV files only include a specific set of fields. Canvas contains additional values that are available through each individual API. After running the CSV files for your institution, standard practice for a majority of institutions is to upload all SIS CSV files and then use the Canvas API to update full account and course attributes. For more information, view the Canvas API documentation for Users, Accounts, Terms, Courses, Sections, Enrollments, and Groups. SIS Imports can also be managed using the SIS Imports API.

users.csv

Users are the people who have user accounts within an institution. The users.csv adds people into the system as generic users. The enrollments.csv will assign a role (teacher, student, etc.) to these users. When a user account is *deleted* all of their enrollments will also be deleted and they won't be able to log in to their Canvas account. If you still want the user to be able to log in but just not participate or if you want to only delete them from a particular course, then you should leave their user account as *active* and change their enrollment (in the enrollments.csv) to *completed* or *deleted*, respectively.

Download a sample users.csv file with 10 Canvas user accounts.

Required Field* | **Sticky Field^**

- **user_id*:** This is a unique value used to identify anyone with an account in Canvas. This value must not change for the user, and must be unique across all users. In the user interface, this is called the SIS ID and may be comprised of any combination of characters. You can find this SIS ID by visiting any user account and then viewing their *Login Information.*
- **integration_id:** This is a secondary unique identifier useful for more complex SIS integrations. This identifier must not change for the user, and must be globally unique.
- **login_id*^:** This is the username one will use to log in to Canvas. If you have an authentication service configured (like LDAP), this will typically match their username in the remote system. Login_id can contain letters, numbers, or the following symbol characters: - _ = + . @
- **password:** If the account is configured to use LDAP or an SSO protocol, then this isn't required. Otherwise, this is the password for the 'login_id' above. This password must be at least 8 characters.
- **ssha_password:** Instead of a plain-text password, you can pass a pre-hashed password using the SSHA password generation scheme in this field. While better than passing a plain text password, you should still encourage users to change their password after logging in for the first time. Learn how to generate SSHA passwords.
- **authentication_provider_id:** This is the authentication provider the login is associated with. Logins associated with a specific provider can only be used with that provider. Legacy providers (LDAP, CAS, SAML) will search for logins associated with them, or unassociated logins. New providers will only search for logins

explicitly associated with them. This can be the integer ID of the provider, or the type of the provider (in which case, it will find the first matching provider).

- **first_name^:** This is the given (first) name of the user. If present, used to construct full_name and/or sortable_name.
- **last_name^:** This is the surname (last) name of the user. If present, used to construct full_name and/or sortable_name.
- **full_name^:** This is both the given and surname of the user. Omit first_name and last_name if this is provided.
- **sortable_name^**: This is the sortable name option in Canvas, usually inferred from the user's name but it can be customized.
- **short_name^:** This is the display name of the user, usually inferred from the user's name but it can be customized.
- **email:** This is the *institution-assigned email address* and will also be marked as the *default email address* for this user account. This email address should still be provided even if it is the same as the user's login_id.
- **pronouns^:** If personal pronouns are enabled, these are the personal pronouns that display after a user's name in Canvas. The pronouns field accepts all pronouns, even if they were not created in the Account Settings page.
- **declared_user_type:** This declared user type can be either administrative, observer, staff, student, student_other, or teacher. Can pass "<delete>" to remove the declared user type from the user.
- **canvas_password_notification:** This defaults to false. When true, user is notified for password setup if the authentication_provider_id is canvas. If your institution does not have a Canvas SIS integration, this field is required to notify new users of their created accounts.
- **home_account:** Setting the home_account as true will create a new user in the target account for the SIS import and merge in another existing user from another account within the consortium with a matching integration_id. Will be ignored unless the target account is associated with an auto-merge consortium.
- **status*^:** This is where you can add or remove a user from Canvas. Mark as *active* to add a user, *suspended* to suspend a user, or *deleted* to remove an existing user.

Email Address Conflicts

Canvas identifies users by email address. When students are added to a course, Canvas attempts to reconcile any email address conflicts when the user first logs in to the course.

Normally email addresses are unique to each student. At times multiple students may share a single email address. When adding students to courses via SIS import, Canvas recognizes when an email address is assigned to more than one student.

- If a new SIS ID is associated with an email address already assigned to an existing SIS ID, Canvas sends an email to the email address.
- When users are added to an account through SIS import, they will not receive an email notification unless the system detects a duplicate user. However, if a user is added or enrolled manually they will receive an

email notifying them they have been added or enrolled in a new course. The student sharing an email address will receive a notification that the email address is already in use and is invited to create a new account in Canvas. *This process may also apply when adding a user to a course enrollment.*

accounts.csv

An account is an organization unit within Canvas (e.g., the parent account for an institution). Each account can contain a hierarchy of sub-accounts, such as creating accounts for individual colleges within an institution, or for individual schools within a district. Sub-accounts can also contain multiple sub-accounts, such as when a college subdivides into departments or programs, or a school that subdivides into grade levels or subjects.

Download a sample accounts.csv file with the following sub-accounts:

- 3 sub-accounts within your main/root account. (Arts & Humanities, Business, Math & Science)
- 4 sub-accounts within your Business sub-account. (Accounting, Computer Science, Economics, and Marketing)
- 3 sub-accounts within your Math & Science sub-account. (Biology, Physics, and Statistics)
- 1 sub-account within your Arts & Humanities sub-account. (Visual Arts)
- 2 sub-accounts within your Visual Arts sub-account. (Photography, and Digital Media)

Required Field* | **Sticky Field^**

- **account_id*:** This is a unique identifier used to create a sub-account. The courses.csv file will allow you to assign courses to a particular account id. This unique identifier must not change for the account, and must be globally unique across all accounts. In the Canvas UI, this is called the SIS ID and can be modified by visiting the *Settings* for each respective sub-account.
- **parent_account_id*^:** This identifier indicates that a sub-account should be nested beneath this parent account. If this field is blank, the sub-account will be nested beneath your root or main account. Note that even if all values are blank, the column must be included to differentiate the file from a group import.
- **name*^**: This is the name for the sub-account.
- **status*:** This is how you can create or remove a sub-account. Mark as *active* to add a sub-account or *deleted* to remove an existing sub-account.
- **integration_id:** This is a secondary unique identifier useful for more complex SIS integrations. This identifier must not change for the account, and must be globally unique.

terms.csv

A term provides a default set of start and end dates to any course assigned to that term. Term dates for courses can be manually managed at the course level without an import file. However, attaching a term_id to many different courses ensures all courses in that term begin/end at the same time. Uploaded term dates will also help you sort and organize courses when viewing data and reports in the Admin interface.

Download a sample terms.csv file with 10 terms.

Required Field* | **Sticky Field^**

- **term_id*:** This is a unique identifier for the term. The courses.csv will allow you to reference this term_id so your courses know when to start and when to conclude. This identifier must not change for the term, and must be globally unique across all terms. In the user interface, this is called the SIS ID.
- **name*^:** This is the name of your term. Come up with a good naming convention that will help you easily reference your terms. There are many admin tools that allow you to search or query data by the term name.
- **status*:** This is how you can create or remove a term. Mark as *active* to add a term or *deleted* to remove an existing term.
- **start_date^:** This is the date the term begins. The format should be in ISO 8601: YYYY-MM-DDTHH:MM:SSZ (The *T* may be replaced with a space, as seen in the example screenshot.) For example August 26, 2013 at 5:00pm EST would be written 2013-08-26T17:00-5:00
- **end_date^:** This is the date the term ends. The format should be in ISO 8601: YYYY-MM-DDTHH:MM:SSZ (The *T* may be replaced with a space, as seen in the example screenshot.) By default, user access is cut off at midnight on your indicated end date, meaning the previous day is the last full day that users have access to the term. Best practice is to set your end date to the day after the term ends.
- **integration_id:** This is a secondary unique identifier useful for more complex SIS integrations. This identifier must not change for the term, and must be globally unique.
- **date_override_enrollment_type:** This allows you to set or remove start and end dates for a specific enrollment type within an existing term. When set, all columns except term_id, status, start_date, and end_date are to be ignored for the row. If status is set to active, the term dates will apply only to enrollments of the given type. If status is set to deleted, the currently set dates will be removed for the given enrollment type. Enrollment type can be set to StudentEnrollment, TeacherEnrollment, TaEnrollment, or DesignerEnrollment.

courses.csv

A course is an organized presentation about a particular subject. Sometimes a course may include a series of courses. Courses are placed within terms to create default start and end dates. However, if a course includes specific course dates, these dates will override the student access dates on the term, identified by the term_id (if included) The value of attaching a term_id is that you will be able to sort and organize the courses when viewing data and reports, in the Admin interface. A term_id can be easily attached to many different courses that begin/end at the same time. If you do not link a course to a term then the course will be linked to the term called *Default Term.*

If your institution has enabled Blueprint Courses, you can use a courses.csv to add associated courses to a blueprint course. Please note that the blueprint course must be created and enabled as a blueprint course before associated courses can be added.

Download a sample courses.csv file with 10 courses; they reside within their respective sub-accounts in a specific term.

Required Field* | **Sticky Field^**

- **course_id*:** This is a unique identifier used to differentiate courses within Canvas. This identifier must not change for the course and **must be globally unique across all courses**. In the user interface, this is called the SIS ID.
- **short_name***^: This is a short name for the course. In the Canvas UI this is also called the *Course Code* or *Reference Code*.
- **long_name***^: This is a long (full) name for the course. (This can be the same as the short name, but if both are available, it will provide a better user experience to provide both.)
- **account_id^:** This is the unique SIS ID account identifier (from the accounts.csv) which tells the course under which sub-account it will reside. If an account_id is not specified for a new course, then the course will be attached to your main/root account. The SIS ID can be found in the subaccount's Settings.
- **term_id^:** This is the unique term identifier (from the terms.csv) which tells the course when to begin and when to conclude. If associating a term_id with a course you do not need to enter a start_date or end_date.
- **status***^: This is the status of the course, also known as the workflow_state. This field allows you to create, remove, conclude, or publish a course. Mark as *active* to add a course, *deleted* to remove an existing course, *completed* to conclude an existing course, or *published* to publish a new or existing course.
- **integration_id:** This is a secondary unique identifier useful for more complex SIS integrations. This identifier must not change for the course, and must be globally unique.
- **start_date^:** This is the date the course begins. The format should be in ISO 8601: YYYY-MM-DDTHH:MM:SSZ (The *T* may be replaced with a space.)
- **end_date^:** This is the date the course ends. The format should be in ISO 8601: YYYY-MM-DDTHH:MM:SSZ (The *T* may be replaced with a space). By default, user access is cut off at midnight on your indicated end date, meaning the previous day is the last full day that users have access to the course. Best practice is to set your end date to the day after the course ends.
- **course_format**: This is the format for the course. The format can be *online*, *on_campus*, or *blended*.
- **blueprint_course_id**: This is the course ID of the blueprint course to which you want to add an associated course. To remove the Blueprint Course link you can pass 'dissociate' in place of the ID. In the user interface, this is the SIS ID of the blueprint course.
- **homeroom_course:** This is used to designate homeroom courses for Canvas for Elementary accounts. Requires the Canvas for Elementary setting to be enabled.

sections.csv

A section subdivides students within a course. Multiple sections can also be cross-listed into one course, especially if all student sections are learning the same course material. Multiple sections can be placed in one course, but a section cannot contain multiple sections. Sections inherit the course dates as set by the term.

However, if a section includes specific dates, these dates will override the student access dates for the course and the term start and/or end dates.

If you are trying to delete a course and the users are associated with sections, you'll need to include the section_id parameter in the CSV import as well as the section SIS IDs.

Download a sample sections.csv file with the following sections:

- 4 sections in the *ACCT300 - Cost Accounting* course
- 4 sections in the *ACCT310 - Managerial Accounting* course
- 2 sections in the *BIO101 - Intro to Biology* course

This file assumes that you may have multiple sections within one course. Many institutions import course sections as separate courses. This can be done by (1) creating a Canvas course for each section in your courses.csv, then (2) creating a single section in each of these courses. You may use essentially the same data for the course and section including the SIS ID which will be the same for both the course_id and section_id.

Required Field* | **Sticky Field^**

- **section_id*:** This is a unique identifier used to create sections within a course. This identifier must not change for the section, and must be globally unique. In the user interface, this is called the SIS ID.
- **course_id***^: This is the unique identifier of the course where the section will be added or deleted (added in courses.csv).
- **name***^: This is the name of the section. Sections are ordered alphabetically by name.
- **status*:** This is how you can create or remove a section within a course. Mark as *active* to create a section or *deleted* to remove an existing section.
- **integration_id:** This is a secondary unique identifier useful for more complex SIS integrations. This identifier must not change for the section, and must be globally unique.
- **start_date^:** This is the date the section begins. The format should be in ISO 8601: YYYY-MM-DDTHH:MM:SSZ (The *T* may be replaced with a space).
- **end_date^:** This is the date the section ends. The format should be in ISO 8601: YYYY-MM-DDTHH:MM:SSZ (The *T* may be replaced with a space). By default, user access is cut off at midnight on your indicated end date, meaning the previous day is the last full day that users have access to the section. Best practice is to set your end date to the day after the section ends.

Note: When importing section CSV files, existing `integration_id` values are now retained if the `integration_id` column is not included in the import file. To remove an `integration_id`, it must be explicitly unset using the `change_sis_id.csv` file.

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.

Note: SIS enrollment CSV files that include start_date and end_date values override term dates, course dates, and section dates.

Download a sample enrollments.csv file with the following enrollments:

- 1 user as a teacher in the *ACCT300 - Cost Accounting* course
- 1 user as ta in the *ACCT300 - Cost Accounting* course
- 1 user as a designer in the *ACCT300 - Cost Accounting* course
- 3 users as students in section 1 of the *ACCT300 - Cost Accounting* course
- 3 users as students in section 2 of the *ACCT300 - Cost Accounting* course
- 1 user as an observer of a student in section 1 of the *ACCT300 - Cost Accounting* course

Required Field* | **Sticky Field^**

- **course_id*: (Required if the section_id is missing)** This is a unique identifier for the course where the user will be enrolled (added in courses.csv). If enrolling students into the course rather than a specific section, put the course_id in this field. Otherwise, leave it blank.
- **root_account**: This is the domain of the account to search for the user.
- **start_date^:** This is the enrollment start date. For start_date to take effect, the end_date also needs to be populated. The format should be in ISO 8601: YYYY-MM-DDTHH:MM:SSZ.
- **end_date^:** This is the enrollment end date. For end_date to take effect, the start_date also needs to be populated. The format should be in ISO 8601: YYYY-MM-DDTHH:MM:SSZ.
- **user_id*:** This is the unique identifier of the user that will be enrolled within the designated courses (added in users.csv). If the user_integration_id is present, this field will be ignored.
- **user_integration_id*: (Required if the user_id is missing)** This is the secondary unique identifier of the user (added in users.csv as the integration_id).
- **role*:** This is the role that a user will be assigned to a user for the designated course. You can enroll a user with any of the following roles: teacher, designer, TA, student, observer, or a custom role that you define. Each role has a permission set that Admins can customize at the main/root account or sub-account level.
- **role_id*: (Required if role is missing)** This is the unique identifier for the role in which the user will be added as part of an enrollment.
- **section_id*: (Required if the course_id is missing)** This is the unique identifier for the section in which the user will be enrolled (added in sections.csv). If enrolling students in a specific section of a course, put the section_id of the section here. Otherwise, leave this field blank. If no section_id is specified the default

section for the course will be used. If a default section does not exist, one will be created automatically without an SIS ID.

- **status*:** This is how you enroll, conclude, deactivate (make inactive), or remove an enrollment in a course. Mark as *active* to enroll a user in a course, *completed* to conclude a user's enrollment in a course, *inactive* to deactivate the user in the course, and *deleted* to remove a user from a course. When in an 'inactive' state, a student will be listed in the course roster for instructors but will not be able to view or participate in the course until the enrollment is activated.
- **associated_user_id: (Observer role only)** This is the unique identifier of the user whose information (including grades) the observer will be able to view. The observer should be enrolled in the same course/ section as the user you would like them to observe. This field will be ignored for any role other than observer.
- **limit_section_privileges:** This is how to designate that the enrollment will allow the user to only see and interact with users enrolled in the section given by course_section_id. This field defaults to false. Limiting students to interact by section only affects Collaborations, Chat, People, and Conversations. When enrolling instructors and TAs, section limitations allow those users to grade students in their same section(s). Discussion topics and Pages are not affected by section limitations and can be viewed by any student. These feature areas could be restricted by creating content in course groups.
- **notify:** This is how you choose to send a notification to the enrolled user(s) when they are enrolled in a course.

Note: The root_account field is recommended when identifying users in a trusted account.

group_categories.csv

Group categories allow you to organize groups in Canvas. A group_categories.csv allows you to create group categories at the account or course level. In the user interface, group categories are called group sets.

Download a sample group_categories.csv file with the following group categories:

- Admin Groups
- Designer Groups
- History Project Groups

Required Field* | **Sticky Field^**

- **group_category_id:** This is the identifier used to reference the group category. The identifier must not change for the group category, and must be globally unique.
- **account_id:** This is the identifier that attaches the group category to an account (added in accounts.csv). If no account or course is specified, the group will be attached to the root account.
- **course_id:** This is the identifier that attaches the group category to a course (added in courses.csv). If no course or account is specified the group will be attached to the root account.
- **category_name*^**: This is the name of the group category.

- **status*:** This is the status of the group category. Mark as *active* to create the group category or *deleted* to delete the group category.

groups.csv

A group can be used to provide collaborative opportunities for students, instructors, admins, or other users. A groups.csv allows you to create course-level and account-level groups. Groups uploaded via SIS can only be updated or deleted via SIS.

Download a sample groups.csv file with the following groups:

- Admins
- Math Teachers
- Designers

Required Field* | **Sticky Field^**

- **group_id*:** This is the unique identifier used to reference your group. It must not change for the group, and must be globally unique.
- **group_category_id:** This is the identifier of the group category (added in group_categories.csv) into which you are adding a group. If no group category is specified, the group will be placed in the default group category for the defined account or course. If no account or course is specified, the group will be placed in the default group category for the root account.
- **account_id:** This is the identifier that attaches the group to an account (added in accounts.csv). If none is specified, the group will be attached to the root account.
- **course_id:** This is the identifier that attaches the group to a course (added in courses.csv). If no course or account is specified the group will be attached to the root account.
- **name*^**: This is the name of the group.
- **status*:** This is the status of the group. Mark as *available* to set the group open for membership or *deleted* to delete the group.

groups_membership.csv

Membership in a group allows users to collaborate on activities in Canvas. A groups_membership.csv allows you to bulk add or remove people to a group you have created via groups.csv.

Download a sample groups_membership.csv file with the following group memberships:

- 1 accepted user in the Admins group
- 1 accepted user in the Math Teachers group
- 1 deleted user in the Math Teachers group

Required Field*

- **group_id*:** This is the unique identifier used to reference your group (added in groups.csv).
- **user_id*:** This is the unique identifier of the user you want to add to the group (added in users.csv).
- **status*:** This is the status of the users in the group. Mark as *accepted* to add a user to a group or *deleted* to remove a user from a group.

xlists.csv

Cross-listing allows you to move sections into another course. A xlist.csv file allows you to cross-list sections into existing courses and create a section hierarchy.

Section ids are expected to exist already and already reference other course ids. If a section id is provided in this file, it will be moved from its existing course id to a new course id, such that if that new course is removed or the cross-listing is removed, the section will revert to its previous course id. If xlist_course_id does not reference an existing course, it will be created. If you want to provide more information about the cross-listed course, please do so in courses.csv.

Download a sample xlists.csv file with the following courses and sections:

- 4 active sections from the *ACCT300 - Cost Accounting* course cross-listed into the *ACCT310 - Managerial Accounting* course

Required Field*

- **xlist_course_id*:** This is the identifier of the new course (added in courses.csv).
- **section_id*:** This is the identifier of the section (added in sections.csv).
- **status*:** This is the status of the section. Mark as *active* to make the section active or *deleted* to remove the section.

user_observers.csv

The observer role can be used to enroll parents and link them to a student, allowing them to view their student's grades and course interactions. A user_observers.csv allows you to enroll and link observers to each of the designated student's enrollments.

Download a sample user_observers.csv file with the following enrollments:

- 2 active observers
- 1 deleted observer

Required Field*

- **observer_id*:** This is the unique identifier of the observer (added as the user_id in users.csv).
- **student_id*:** This is the unique identifier of the student (added as the user_id in users.csv).

- **status*:** This is the status of the observer. Mark as *active* to enroll the observer for each of the student's enrollments or *deleted* to remove all the observer's enrollments.

logins.csv

The logins.csv allows you to create or update login credentials for users. Logins can only be added to existing users. Logins can be removed using the users.csv.

Download a sample logins.csv file with three user logins.

Required Field* | **Sticky Field^**

- **user_id*:** This is the unique identifier of the user (referenced in enrollments.csv). This value must not change for the user and must be unique across all users. Called the SIS ID in the Canvas user interface.
- **integration_id:** This is a secondary unique identifier useful for complex SIS integrations. This value must not change for the user and must be unique across all users. This field should be left blank when merging users with matching integration IDs.
- **login_id*:** This is the name that the user would use to log in to Canvas. For configured authentication services, such as LDAP, this will be the username from the remote system.
- **password:** This is the password that the user will use to log in to Canvas. This field should not be filled for accounts configured to LDAP or SSO.
- **ssha_password:** This is a password generated with a pre-hashed SSHA generation scheme.
- **authentication_provider_id:** This is the authentication provider that the login is associated with.
- **existing_user_id^:** This is the user's SIS ID, as found in the users.csv.
- **existing_integration_id^:** This is the user's integration ID, as found in the users.csv.
- **existing_canvas_user_id^:** This is the user's Canvas ID.
- **root_account:** This is the domain account for the user.
- **email:** This is the user's email address.

Notes:

- **existing_user_id, existing_integration_id, or existing_canvas_user_id*: (required for a successful import of logins.csv)**
- **root_account*: (required when identifying users in a trusted account e.g., when cross-listing users across accounts within a trusted account).**
- **status*: (required when performing a SIS import using logins.csv)**

admins.csv

Admins manage settings for an entire account or subaccount. An admins.csv allows you to designate users in Canvas as account admins or other custom account or subaccount roles.

Download a sample admins.csv file with the following admins:

- 2 active account admins
- 1 deleted account admin
- 2 active custom account roles

Required Field*

- **user_id*:** This is the unique ID of the user you would like to designate as an admin (added in users.csv).
- **account_id*:** This is the unique identifier of the account in which you would like the admin to reside (added in accounts.csv). If this column is left blank, the user will reside in the root account. This column is always required, even if the value is blank.
- **role_id*: (required if role is missing)** This is the ID of the role, either the default ID or a custom ID defined by the account.
- **role*: (required if role_id is missing)** This is the name of the role, either the default Account Admin role or a custom role defined by the account. If you are adding an account admin, format the field to read 'AccountAdmin'. If you are adding a custom role, format the field exactly as it appears in the Canvas UI.
- **status*:** This is the status of the admin. Mark as *active* to create an active admin or *deleted* to remove an admin.
- **root_account:** This is the domain of the account to search for the user.

change_sis_id.csv

A SIS ID is a unique identifier for an object in Canvas. A change_sis_id.csv allows you to bulk change SIS IDs for existing accounts, terms, courses, sections, groups, or users.

Download a sample change_sis_id.csv file with the following SIS ID changes:

- 1 user SIS ID change
- 1 course SIS ID change
- 1 term SIS ID change

Required Field*

- **old_id*:** This is the current SIS ID of the object.
- **new_id*:** This is the desired SIS ID of the object. The new SIS ID must be currently unique to the object type and the root account.
- **type*:** This is the type of object. Type can be account, term, course, section, group, or user.

How do I create an automated data integration for an account with Canvas and my SIS?

Student Information System (SIS) Imports are a great way to manually import bulk data (or changes) into the Canvas system. This lesson will provide the basic lessons on how to use the Canvas API and the programming language of your choice to set up an automated system to manage your SIS import workflow.

Several programming languages can be used to build an automated integration tool with Canvas. If your preferred programming language can make Secure Socket Layer (SSL) web calls (HTTPS) to an external server and has the ability to post files, you can apply the steps in this lesson to the programming language of your choice (or just install cURL and write a batch file). This lesson provides a simple approach to setting up a basic automated import system. However, you may want to develop a more complex system based on your skills and the abilities of your specific SIS integration.

Testing Data Integrations

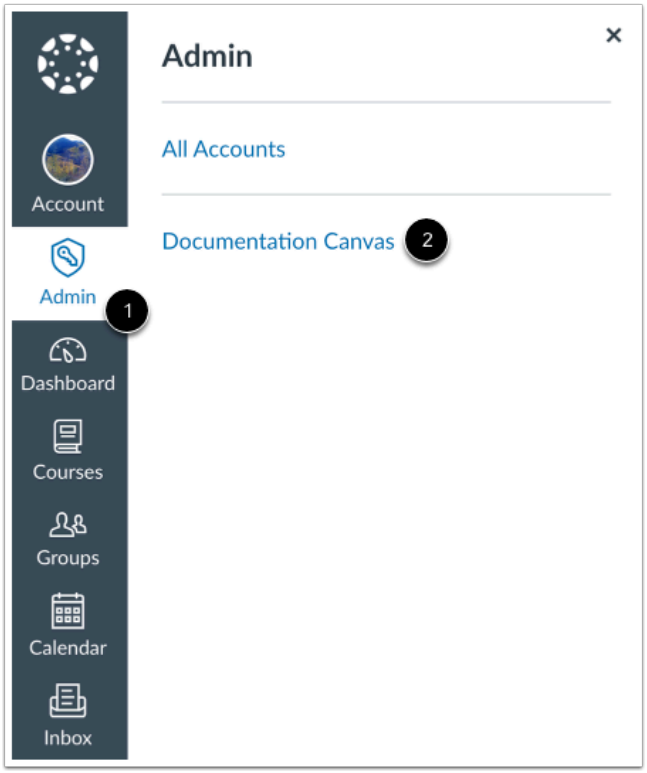
To avoid affecting data in your production environment, you may want to set up your SIS integration in your test environment for accurate testing. Every three weeks, the day after a new Canvas production release, your production environment will create an updated copy for your test environment so you can test with up-to-date data. Once you have confirmed your data works correctly, you can re-apply your SIS integration to your production environment.

Alternatively, you can create your changes in your production environment, then wait for the next refresh before you begin practicing in your test environment.

Advanced Help

- Canvas Community Migrations and Integrations Group
- Canvas API Documentation
- SIS Imports via Canvas API (automated)
- SIS Imports via Canvas UI (manual)

Open Account



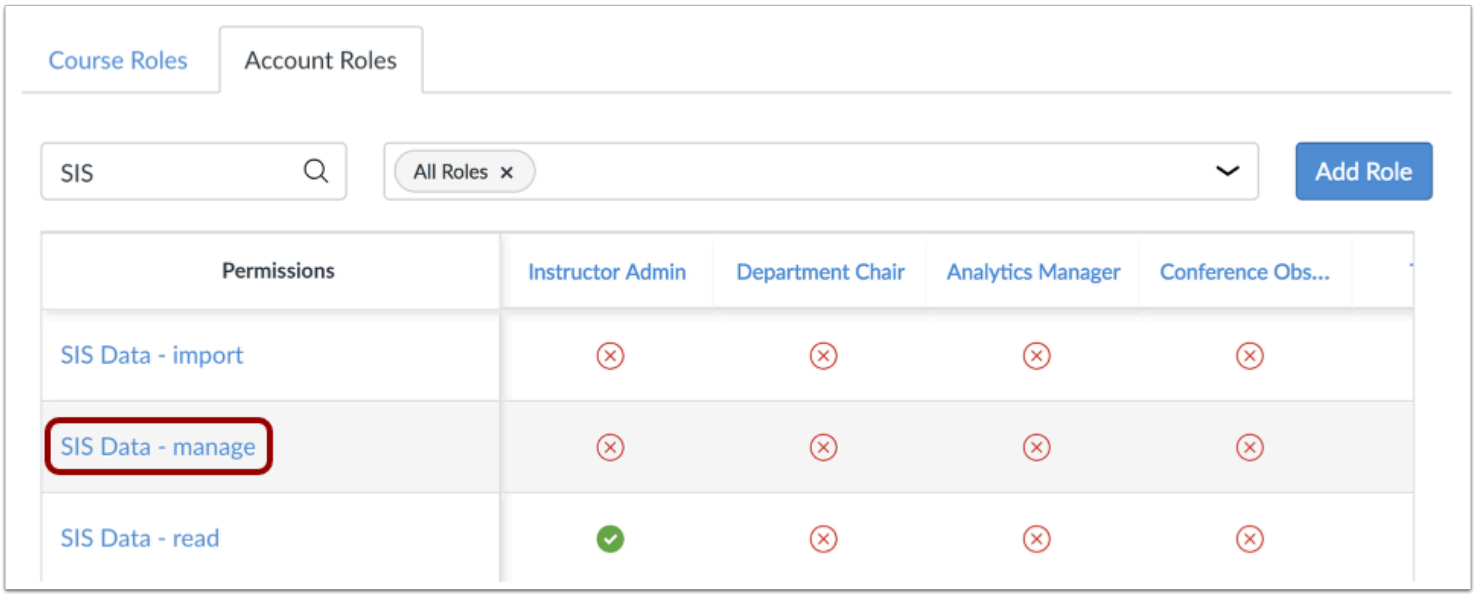
Click the **Admin** link [1], then click the name of the account [2].

Open Permissions



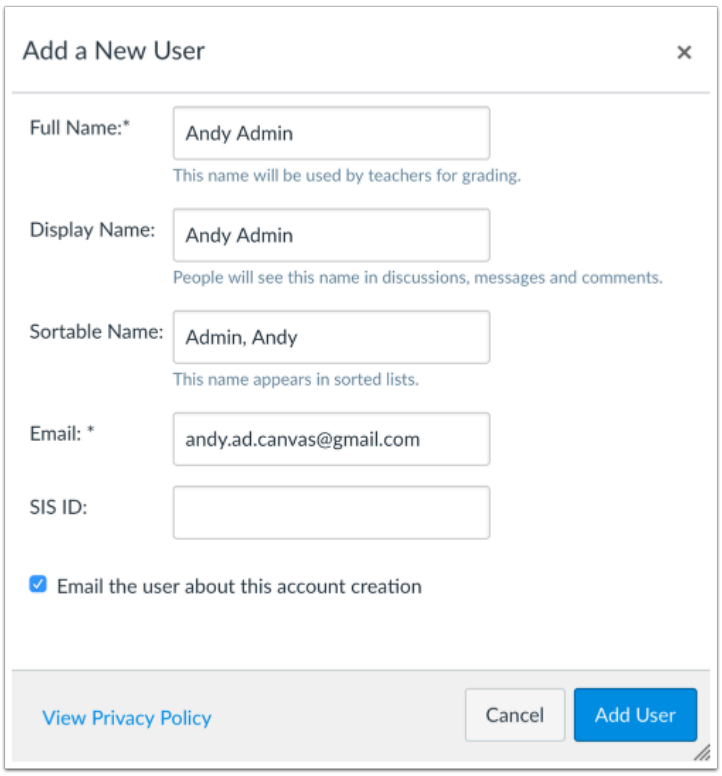
In Account Navigation, click the **Permissions** link.

Modify User Role and Permissions



In the Account Roles tab, create an account-level user role and allow the user to manage SIS data. If you do not want to create a new user role, you can use an existing user role and modify the permissions.

Manually Add New User



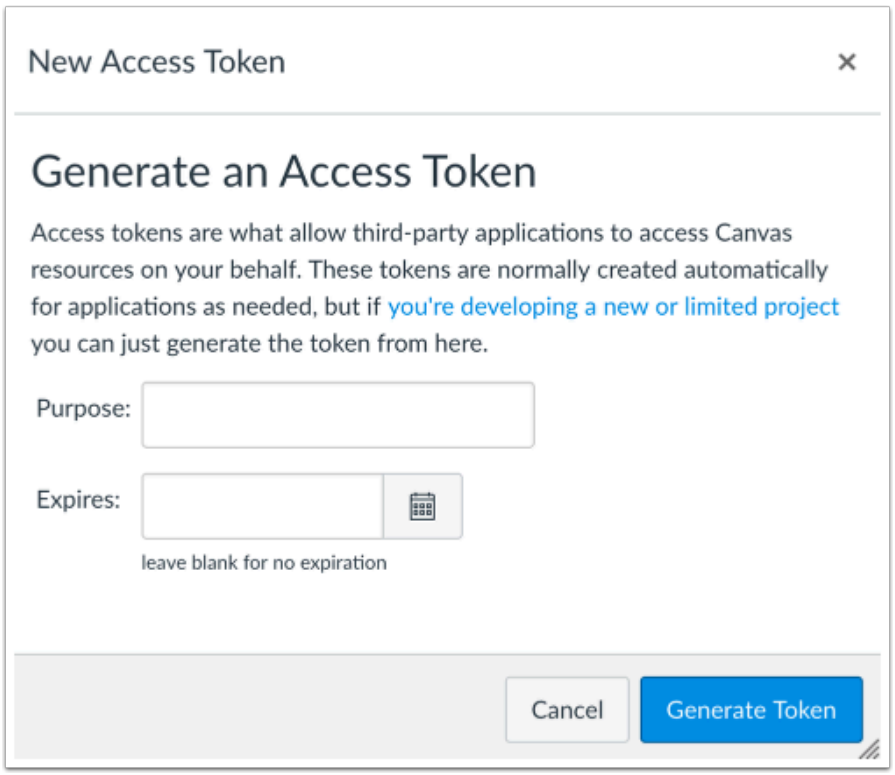
You'll need to manually add a new user to manage the SIS data. You can use an existing user imported via SIS, but manually creating a new user is beneficial for security purposes. This new user will end up with only one permission, but that one permission grants the ability to create, modify, and delete many object types in Canvas.

Add User as Admin



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 & Linux (Ubuntu)

cURL should already be installed and run from the Terminal application.

cURL may already be installed. If not already installed, run the following command with a user that has sudo privileges:

```
sudo apt-get install curl
```

After installing cURL, test the installation by typing the following command on a terminal or command prompt:

```
curl --version
```

If successfully installed, the version of cURL should be displayed.

Windows

If you are planning to use Windows as your import server you should consider using PowerShell instead of cURL for your production import tool. PowerShell is native to Windows and should result in a more reliable import script than using cURL and a batch file. We only recommend using cURL on Windows for testing purposes. Learn how to install PowerShell on Windows.

Import Test File

Practice using the API before adding the complexity of a script.

1. In the “tmp” directory, create a CSV file name \P\P\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.

Notes:

- When this command is complete, you will need the "id" parameter to check the status of an import.
- When importing section CSV files, existing `integration_id` values are now retained if the `integration_id` column is not included in the import file. To remove an `integration_id`, it must be explicitly unset using the `change_sis_id.csv` file.

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 the result from running the previous command:


```
{"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_typ
e":"instructure_csv","supplied_batches":["course"],"counts":{"accounts":0,"terms":0,"abst
ract_courses":0,"courses":1,"sections":0,"xlists":0,"users":0,"enrollments":0,"groups":0,
"group_memberships":0,"grade_publishing_results":0}}}
```


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.

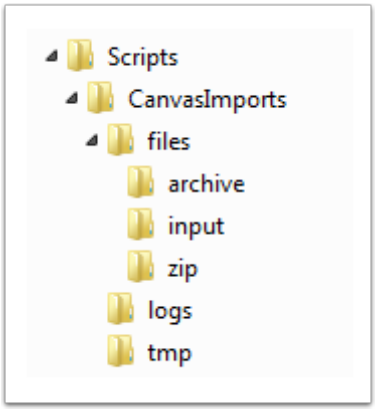
Script Programming Languages

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.

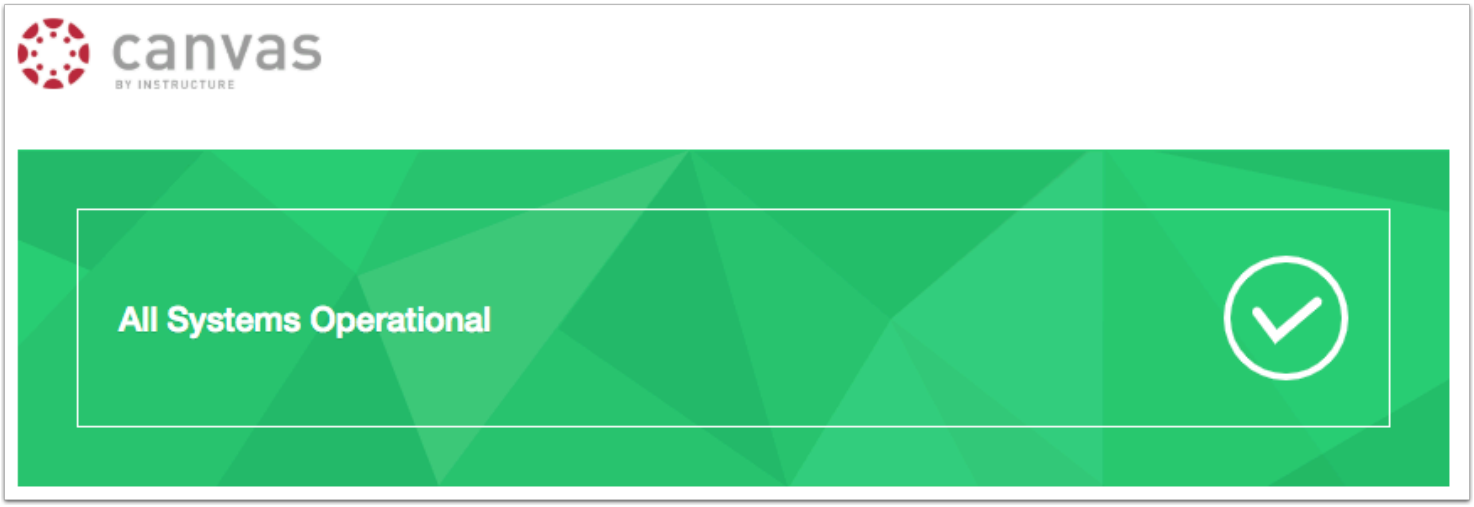
By using the tools that are presented in these tutorials, you should now be better prepared to create your own automated import tool. If you run into challenges, please visit our LMS Migration Strategies group. You may find other people there who can help with comments and suggestions on your script.

Support Information

How will I know if there is a Canvas outage?

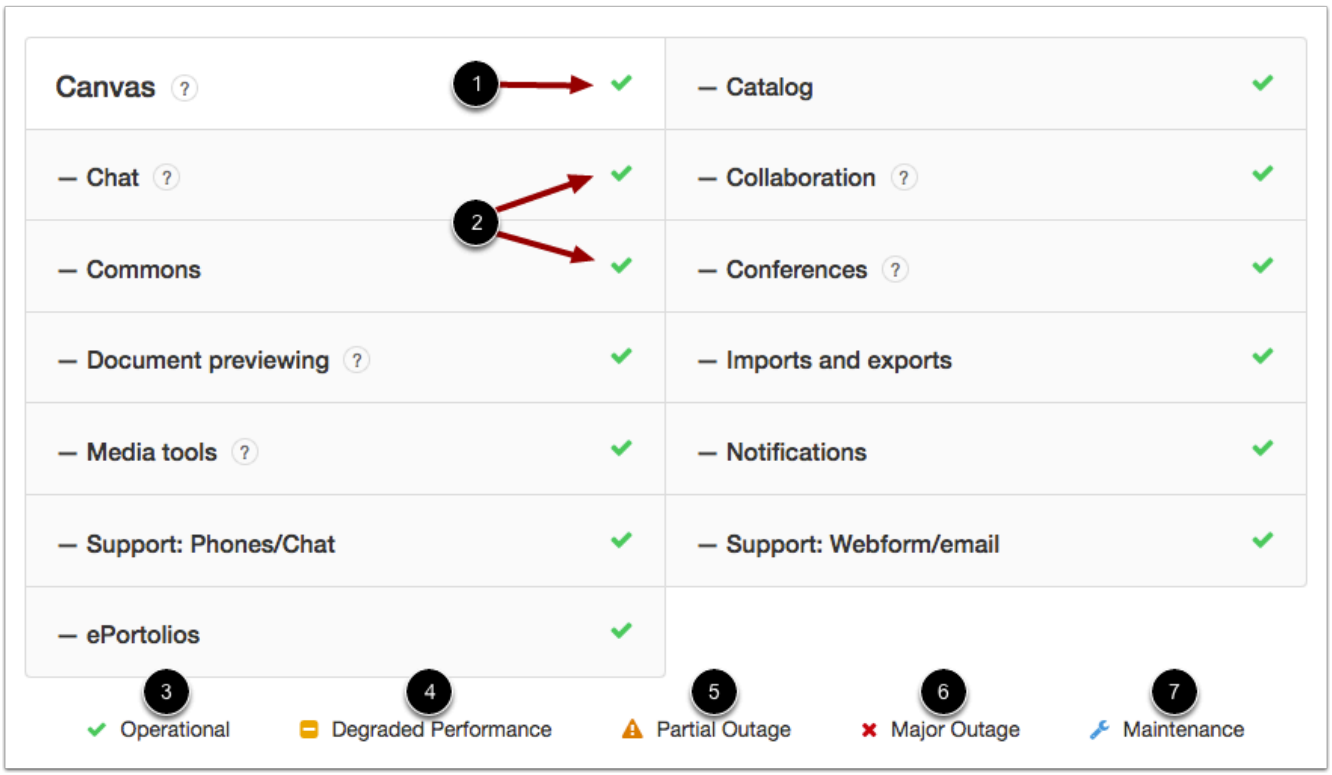
Stay updated on information regarding Canvas by using the Status Page or the Admin Mailing List.

View Canvas Status Page



Visit status.instructure.com for incident reports regarding Canvas. The reports are global announcements that may or may not affect your institution. The Canvas Status Page will only include outages that last longer than 15 minutes.

View Status Icons



On the Status Page, icons are used to describe the current status of Canvas as a whole [1] and specific components within Canvas [2]. These icons will correlate with the following statuses:

- **Operational:** component is working as expected [3]
- **Degraded Performance:** component is experiencing slowness outside of expected range [4]
- **Partial Outage:** component is experiencing extreme slowness with intermittent downtime that typically affects a small subset of users [5]
- **Major Outage:** component is no longer functional or experiencing partial outage that affects large number of Canvas users [6]
- **Maintenance:** component has been intentionally taken down for major repairs [7]

Subscribe to the Admin Mailing List

Contact your Customer Success Manager to subscribe to the Admin Mailing List. If you are subscribed to the mailing list, you will receive emails if your institution is affected by a Canvas outage.

How can I manage support tickets for my institution?

You can choose from three possible destinations for where the tickets your users create through the Canvas Help Menu will go, which helps you streamline your internal support team's workflow.

You can choose to route your users' tickets to:

- Our ticketing system (Salesforce Service Cloud)
- Your own instance of Zendesk or Service Cloud using a custom API connector
- Almost any other ticketing system by email or web post

Note: Ticket management processes are determined by your institution, including how tickets are routed, prioritized, and resolved.

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. Learn how to 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.

Terms

How do I use the Terms page in an account?

Terms create a default set of participation start and end dates that apply to any course added to that term. Terms can be added manually or created through SIS imports. Once a user is added to a course, terms set default dates for when users can participate in courses assigned to that term. User participation is limited to published courses.

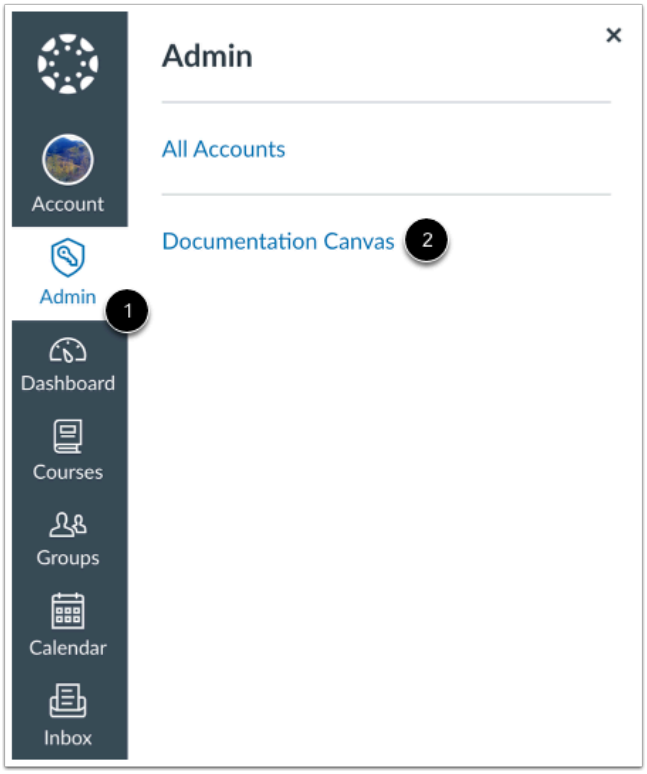
Canvas always includes a default term, which cannot be removed or renamed.

View a video about Terms.

Notes:

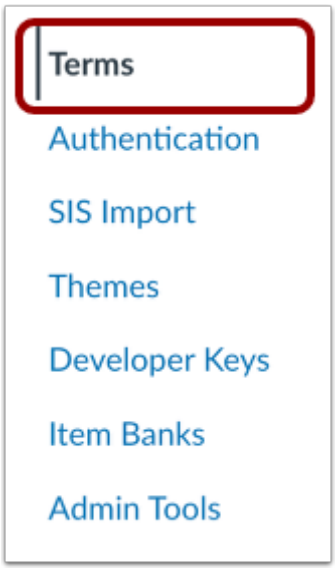
- Not all courses within a term conform to the term dates, as course or section start dates may override the term dates. Course or section overrides may be before or after the start of the term.
- Only admins can view the Terms page in Canvas. Instructors can view term dates in Course Settings. Make sure students in your institution are aware of term dates for your institution.
- Terms in consortium accounts are inherited from the parent account. Child consortium accounts cannot view or change terms.

Open Account



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

Open Terms



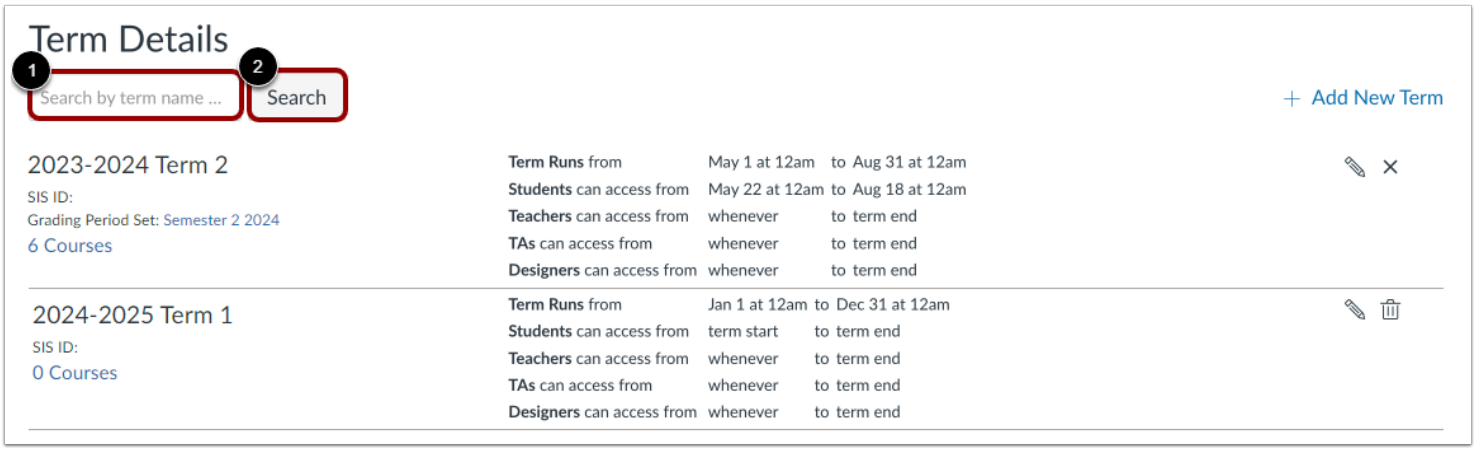
In Account Navigation, click the **Terms** link.

Add Term



To add a new term, click the **Add New Term** link.

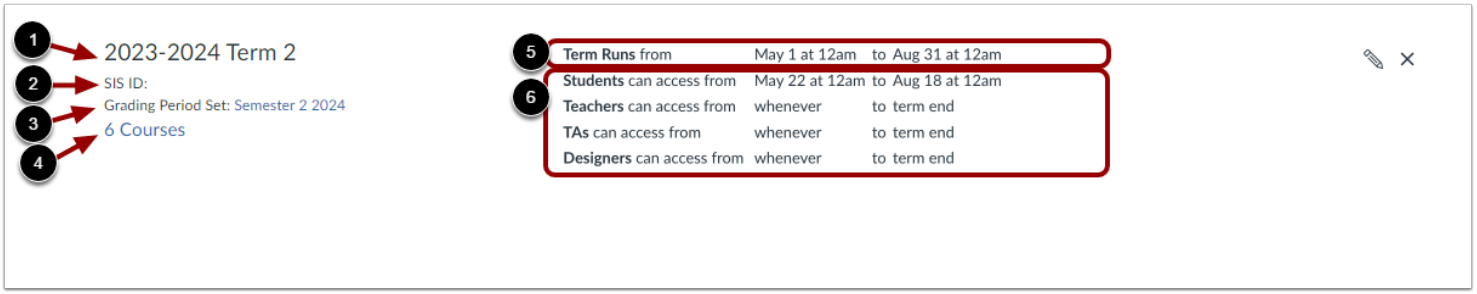
View Terms



The Terms page displays all terms that have been created in your account. Terms can be created manually or via SIS Import.

To search for a term, enter the term name in the **Search by term name** field [1] and click the **Search** button [2].

View Term Details



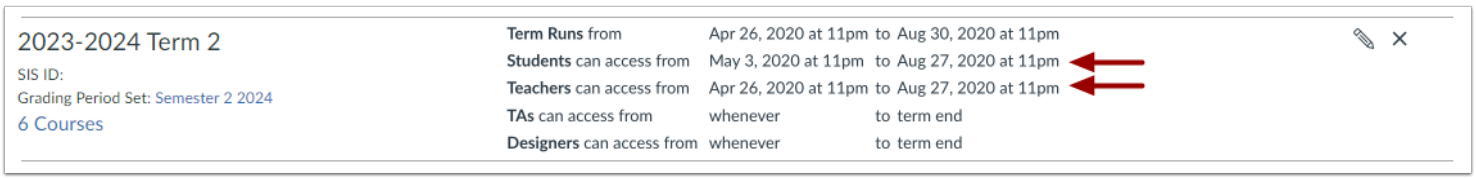
For each term, you can view all the details created in that term.

You can view the name of the term [1], the term SIS ID (if applicable) [2], the grading period set associated with the term (if applicable) [3], and the number of courses within the term [4].

You can also view the term dates [5] and specific user role access dates [6].

Open Account

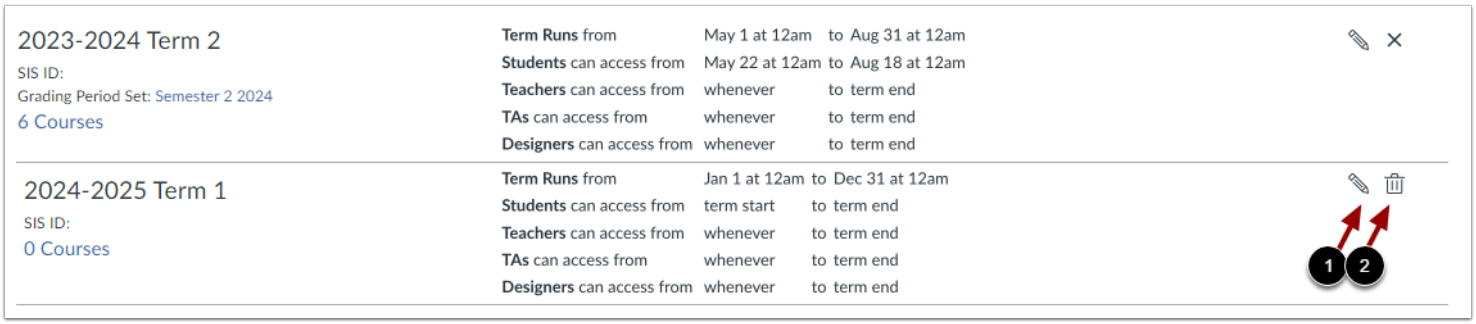
View Custom User Dates



If specific user access dates have been added for the term, you can view the dates within each user role.

Note: SIS imports cannot specify specific dates for each user group. Those dates must be changed manually.

Manage Terms



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

Note: You cannot delete a term that contains courses.

How do I add a new term in an account?

Term dates should be set before adding any courses to your account. Terms are associated with and used to filter data in account grading periods, admin analytics, analytics hub, and account reports.

Canvas always includes a default term, which cannot be removed or renamed. However, you can add new terms with specific start and end dates.

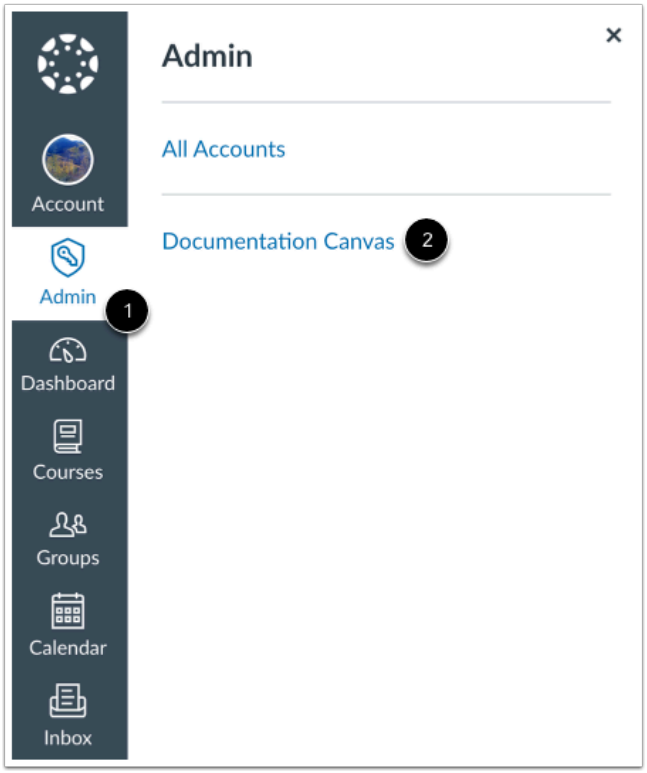
Within each term, you can also set participation dates for specific user roles. Retaining the default term settings seem to be preferred by the majority of Canvas institutions, as they allow Teachers, TAs, and Designers to ensure course content will be ready by the course start date. Default settings include the following access for each user role:

- Students inherit the term start and term end date.
- Teachers, TAs, and Designers dates inherit a *whenever* start date to the term end date. *Whenever* means that these user roles can always access a course before the term begins.

Notes:

- Terms can also be created using SIS Imports. However, SIS imports cannot specify specific dates for each user group and must be changed manually.
- Terms reside at the main account level and cannot be created for sub-accounts.
- Only admins can view the Terms page in Canvas. Instructors and students cannot view the Terms page, so please ensure users in your institution are aware of term dates for your institution publicly.
- Terms in consortium accounts are inherited from the parent account. Child consortium accounts cannot view or change terms.

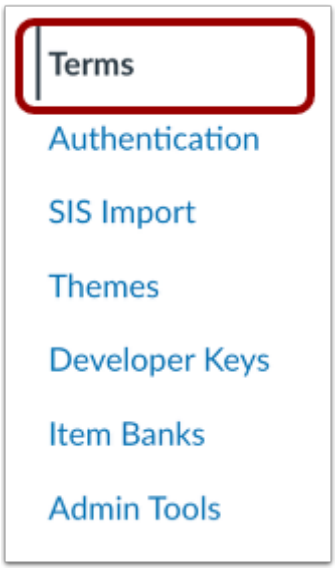
Open Account



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

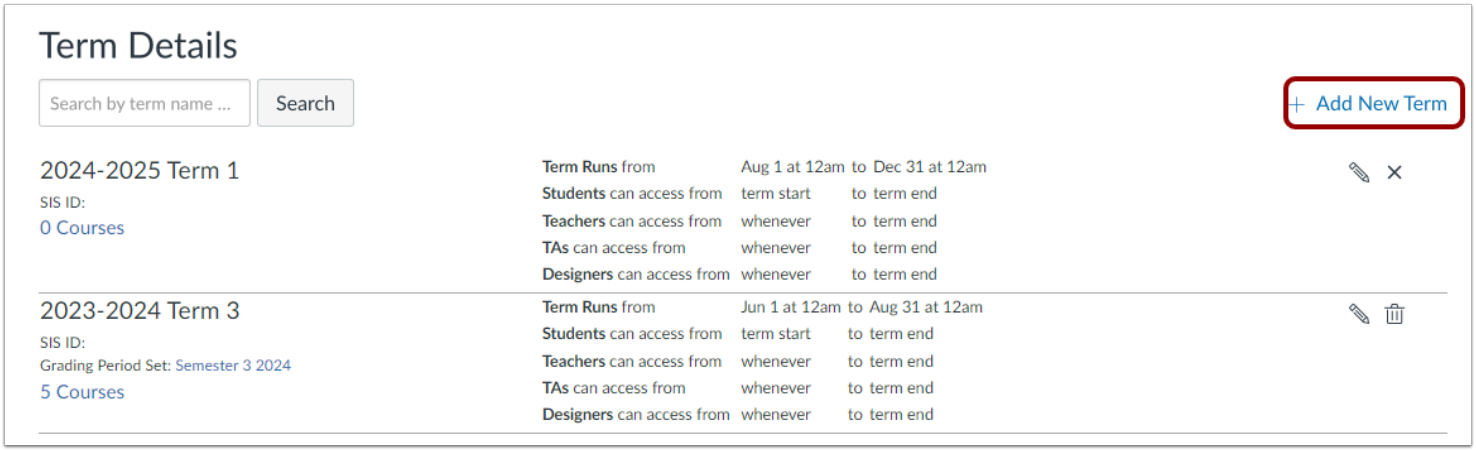
Open Account

Open Terms



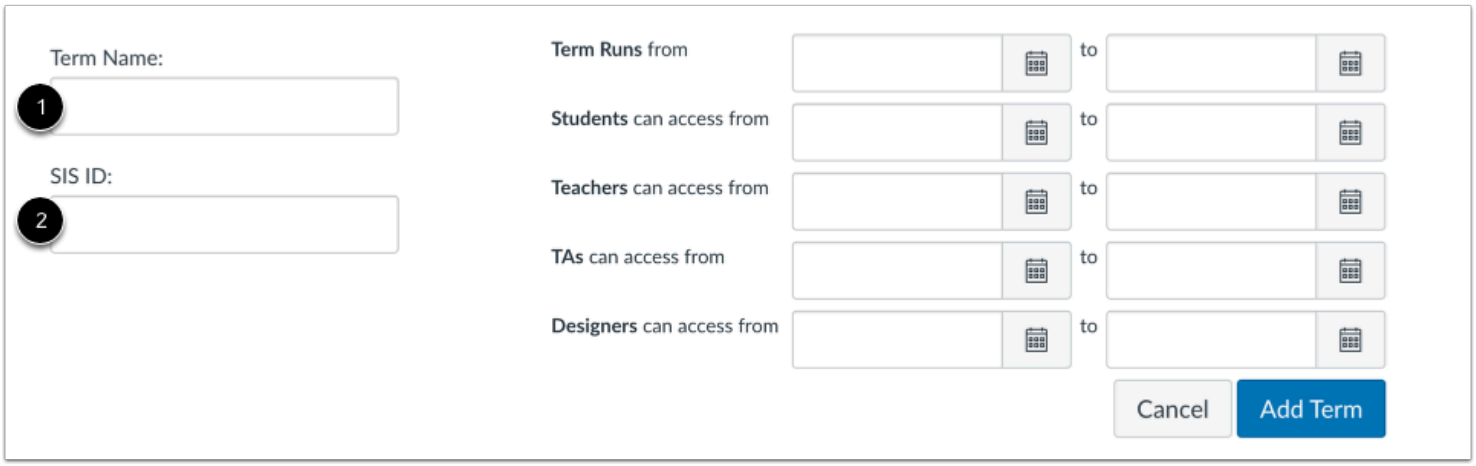
In Account Navigation, click the **Terms** link.

Add New Term



Click the **Add New Term** link.

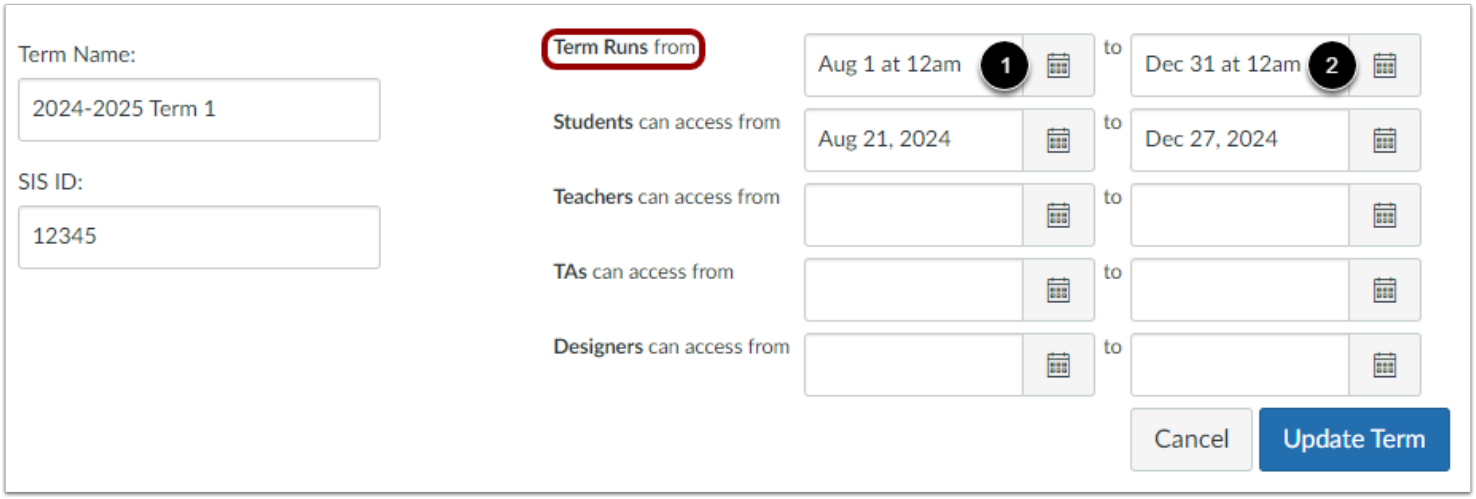
Add Term Details



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]. In SIS CSV files, the SIS ID is called the course ID.

Add Term Dates



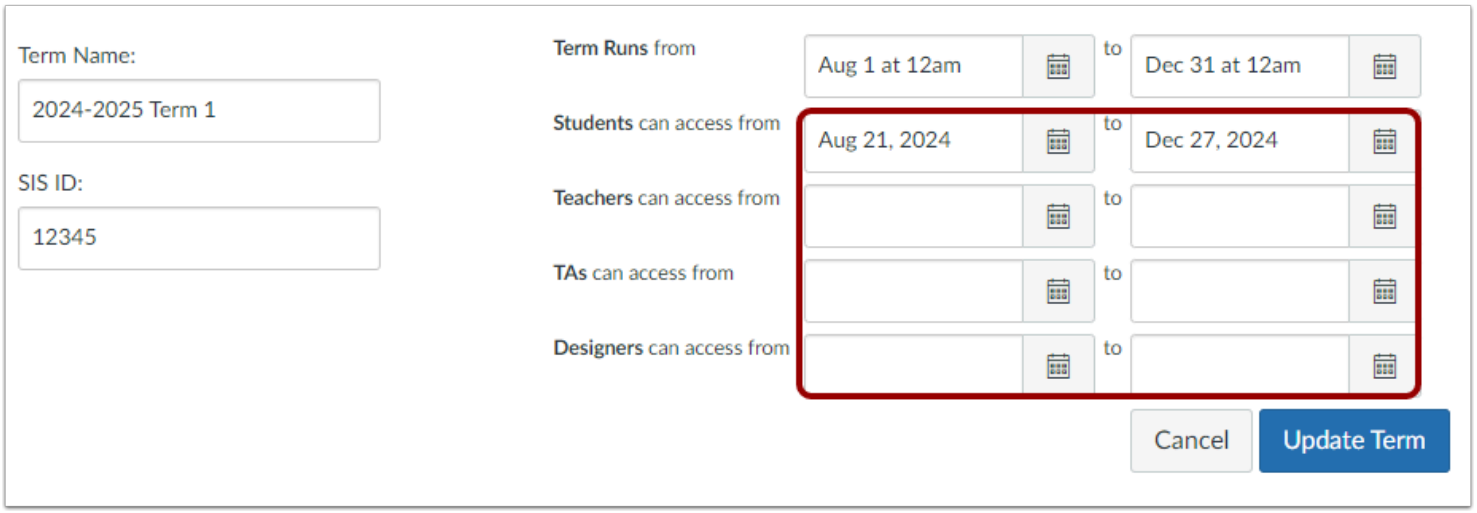
In the **Term Runs from** line, use the calendar icons to set a term start date [1] and term end date [2].

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].

Notes:

- By default, term access is cut off at 12 AM on your indicated end date, meaning the previous day is the last full day that users have access to the term. For instance, setting an end date of December 16 means December 15 is the last full day users can access the course. However, you can set a specific time as part of the term dates.
- End dates occur at precisely the minute they are set. For example, a term with an end time at 11:59pm will end at 11:59:00.

Add User Dates

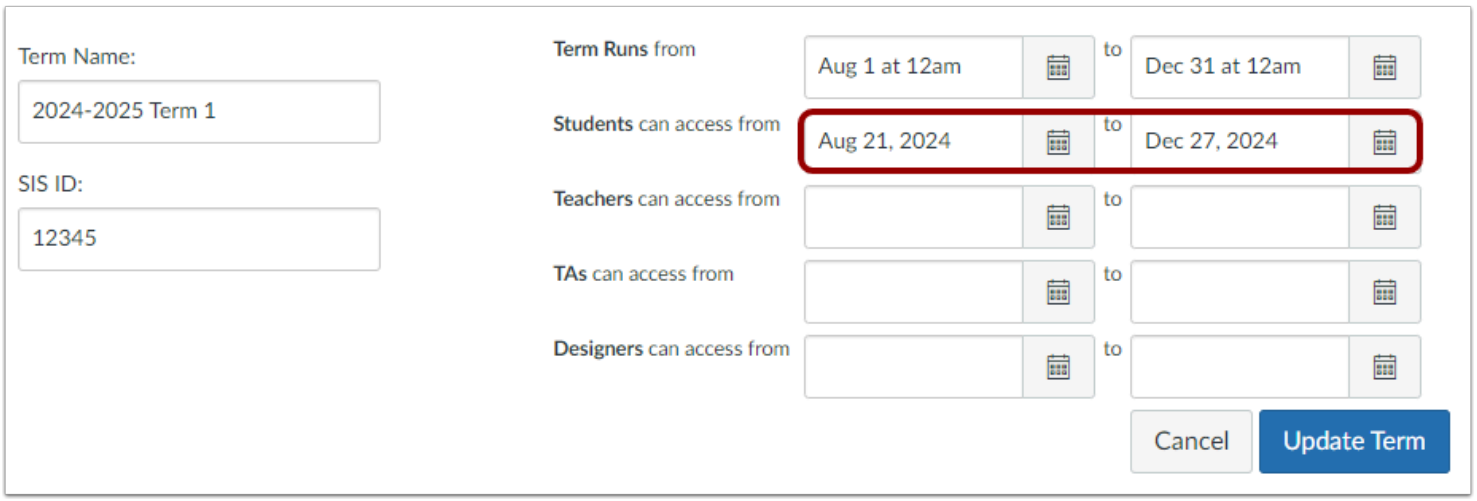


Each term allows you to set specific participation dates for each user role.

If you want each user role to inherit the default term dates, *you do not need to enter any dates*. Once you save the term and add it to your account, the user roles will display the following defaults:

- Students inherit the term start and term end date (identified in the Terms page as *term start* and *term end*).
- Teachers, TAs, and Designers dates inherit a *whenever* start date to the term end date (identified in the Terms page as *term end*). *Whenever* means that there is no start date, and these user roles can always access a course before the term begins.

Modify User Dates



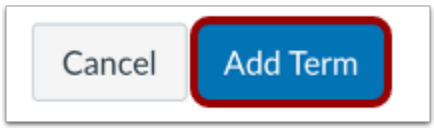
If you want to set start and end dates for a specific user role, locate the role and set dates for that role.

For example, if you want teachers to only be able to access unpublished courses two months before the term start date, and TAs only one week before the term start date, you can set a new start date for each of their respective roles. Date changes to a base role affect all users with the role, including custom roles.

Notes:

- Use caution when editing a *whenever* date, as the *whenever* entry is no longer available after it is edited.
- Changing the Teachers, TAs, and Designers start dates affects their ability to access unpublished courses in the term.

Add Term



Click the **Add Term** button.

Manage Term



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

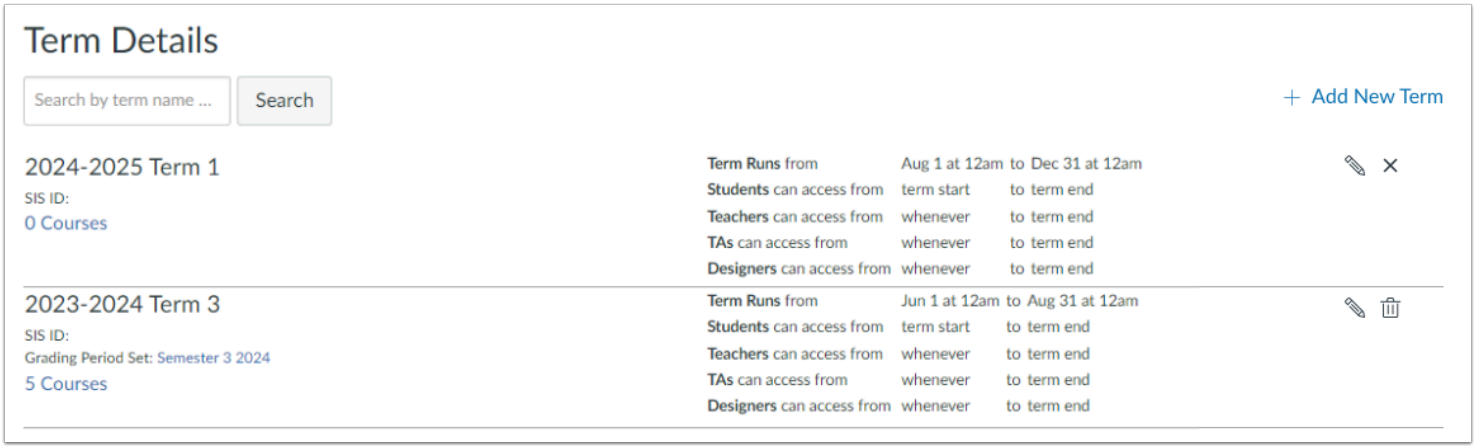
Note: Terms cannot be deleted if they contain courses.

What should I do at the beginning and end of each term as an admin?

This lesson includes information on creating terms, adding sections, and ending terms.

Note: Terms in consortium accounts are inherited from the parent account. Child consortium accounts cannot view or change terms.

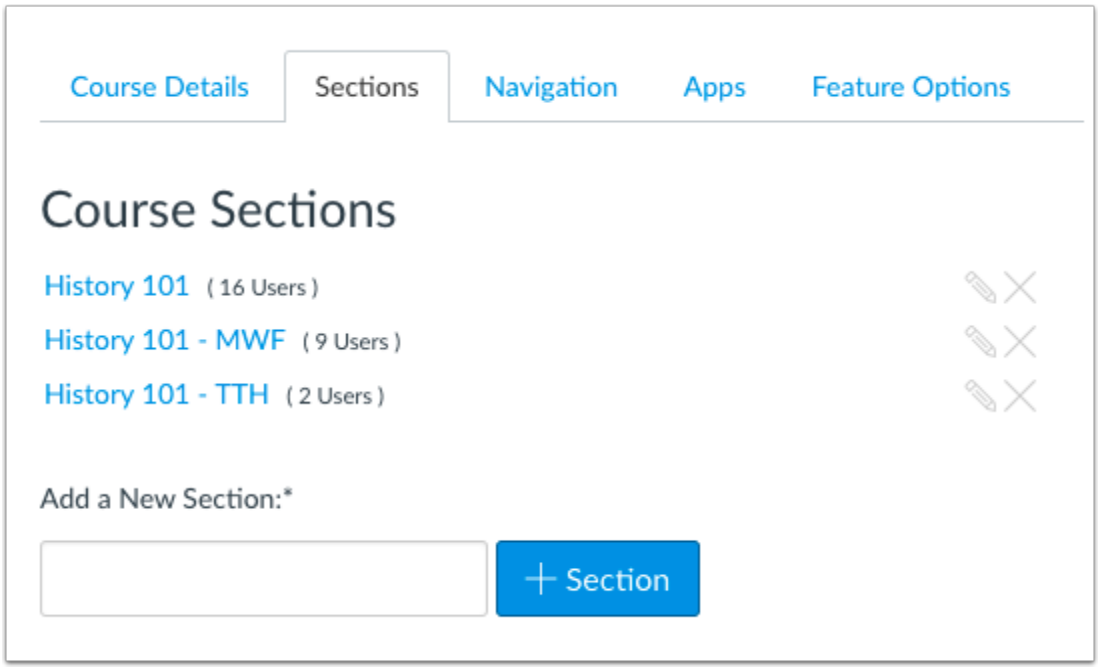
Create Term



At the beginning of the term, make sure the term is built. If there is no term, the courses have no home. Instructors should have access to the course(s) they are teaching before and after the term. Once the term is built, then most of the information that goes into the term will be automatically added. This information includes the SIS file with all the student information, sections, enrollments, and cross-listings.

If your institution uses grading periods, you can associate a term with a grading period set.

Add Sections



The next step is to add sections. This usually takes place via SIS files. The SIS Importer tells Canvas how to interpret the XML file that comes from the SIS file. Those XML files may include section and/or course information. To add a section manually, in Course Navigation, click the **Settings** link.

Course Sections create a course short name by adopting the section name (ie: DS-101 section 001, that will a create a course with the name DS-101-001). Enrollments are automated and flow between the software and Canvas.

Note: Sections are mobile. They are easily created and can move from term to term or course to course. Just be wary that if there are multiple sections (cross-listing), that the instructor knows to not start building the course until the information has been processed through Canvas. For courses with cross-listings (DS-101-001, DS-101-002, DS-101-003), Canvas pulls a random section to be the main one. For example, DS-101-003 is the section that Canvas pulls to be the live course which makes it the section that needs to be built. Otherwise, the hard work of the instructor won't be there in the live course. This is done by live events or manual batch uploads.

End Term

If course participation dates are associated with a specific term, the course should automatically conclude at the end of the term. Course dates can be set to extend past term dates if the course needs to extend past the term. 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 complete general course building.
- Make sure courses are properly built for their needs. This includes reviewing proper course names, sections, cross-listed sections, etc.
- Verify participation dates in your Course Settings. Participation dates can align with term dates or be set to their own specific dates.
- Additionally, you can restrict students from viewing the course before and/or after the participation dates.
- Copy content into the course if you are migrating from another system. Otherwise, it is a best practice to build the course from scratch in Canvas.
- Update the syllabus, make sure assignment dates are set properly, and make sure quizzes and/or surveys have been published.
- Make sure the grading scheme has been set.
- Make sure Assignment groups are set up correctly.
- Make sure files or folders that you don't want students to see are locked.
- Check course content to be certain all the information is there.

Notes:

- Building a course within Canvas is usually easier to edit than importing content and fixing everything that goes wrong. A best practice would be to download the files and/or course content you want to move to Canvas and then manually upload everything into Canvas. Sure, it may take longer, but in the end the instructors will have to look over their content and perhaps change some of it to make it better.
- If instructors have courses they no longer want to use, encourage them to conclude or delete the course for the benefit of their students. If your institution allows students to see their future enrollments, any course that is not published will remain in the Future Enrollments section of a student's Courses but will not be accessible to students. Concluding or deleting the course will remove these courses from this section.

View Grades

At the end of the term, instructors should be encouraged to:

- Make sure all assignments have a graded value. For example, a score of 0 or default grades for all ungraded assignments.
- Download .csv gradebook for backup, publish to SIS (feature,) or manually enter into SS.

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).