SAKAI BASICS
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What is Home?

When you log in to Sakai, you will immediately see your Home area, or your individual workspace in the system. Your Home displays the Message of the Day as well as course announcements, calendar, and message notifications. You will also see links to account utilities, enrolled courses, and other system-wide resources.

*Note: The default location and availability of items in Home may be customized by your institution.*

Home Navigation and Display

Home consists of the following navigation and display elements:

1. Site Navigation across the top
2. The Tool Menu on the left
3. The Message of the Day
4. Home: Calendar
5. Home: Information Display
6. Home: Recent Announcements
7. Home: Message Center Notifications
The Home area of Sakai is designed to give you an overview of what is happening in your courses, and provide access to your individual account information and preferences.
What is Site Navigation?

Site Navigation

The Site Navigation across the top of the screen allows you to access all of the Sakai sites in which you are enrolled. You may also return to Home at any time by clicking on the Home button on the far left.

Jump to site tools.

You may click on the down arrows next to each site name to expand the Tool Menu for that site. Selecting a tool from that list will take you directly to that area of the selected site.
Currently selected site.

The currently selected site will appear highlighted in a different color in the navigation bar.

Sites drawer.

The top site navigation bar can only display a small number of sites without appearing crowded or expanding to fill several lines. If you have many active sites, clicking on the Sites icon will display all of your active sites. Sites are grouped by academic term and type of site (i.e. course or project sites). If you have the appropriate permissions, you may also create sites from this location.

Note: Inactive or Archived sites will not display in the Sites drawer. You can access inactive sites from the Membership or Worksite Setup tools.
Favoriting Sites.

Click on the star icon (Add to Favorites) next to a site in the list to make it a favorite. This will add it to your persistent navigation buttons at the top of the screen.

Reload to view new navigation buttons.

When you exit the Sites drawer, you will be prompted to Reload in order to view your newly selected favorites.

All of your selected favorites will appear in the navigation bar.
Organizing favorites.

To organize your favorites, go to Sites and select the Organize Favorites tab.

Drag and drop to reorder.

The order in which sites are listed here determines the order in which the buttons appear in the top navigation.

*Note: The Home button is fixed and always appears in the same location.*
Unfavoriting a site.

To remove a site from your favorites, click on the star icon (Remove from favorites) to remove it from the top navigation. You can do this from either the Organize Favorites tab or the Sites tab.

Reload to view current selections.

You will be prompted to Reload if you made any changes to favorite sites or site order.
Automatically add new sites.

If you would like new sites to be automatically added to your Favorites when you are enrolled, keep the default On selection in the Organize Favorites tab. If you prefer to manually add new sites, select Off instead.

Logging out of the system.

You may log out of the system by clicking on the user name and profile photo in the top navigation bar and selecting Log Out from the drop-down menu.
What is the Home Tool Menu?

My Home Tool Menu.

The Home Tool Menu contains links to user account information and preferences. These links include:

- Profile
- Membership
- Calendar
- Resources
- Announcements
- Worksite Setup
- Preferences
- Account
- Help

Note: You may also see links to system-wide resources in this menu if they have been added by your institution. Also note that the tools displayed in the Tool Menu will be different depending on which Sakai site you are currently viewing.
You may expand and collapse the Tool Menu by clicking on the double arrows at the bottom of the menu area. When the menu is collapsed, the menu links are represented by their associated icons.
What is the Home Message of the Day?

In the Overview area of Home, you will see announcements from your system administrator under "Message of the Day" (MOTD). The MOTD is typically used for system-wide announcements. Most institutions use this space to display messages about scheduled maintenance, system updates, and important dates and events.

View the MOTD.
Select Options to customize display. (Optional)

You may customize the appearance of the Message of the Day by selecting the Options button.

**MOTD Options**

1. You can choose to view just the subject line or the entire body of the message (default selection) by selecting the appropriate radio button.
2. You may also use the drop-down menu to select to view All, One, or Two lines of the message body.
3. You may also specify how many days in the past messages should be displayed. This is useful if you prefer to only see recently posted messages.

If you make any changes to the default options, be sure to click **Update** to save your settings.
What is the Home Calendar?

The Home Calendar shows all events from all of the sites in which you are enrolled. In addition, you may also create individual, private calendar entries that are only visible to you from your Home area.

View Calendar.
Click Options to customize calendar display. (Optional)

You may customize the appearance of your Calendar by selecting the **Options** button.
Select custom preferences and Update.
Subscribe to your Home Calendar from another application.

If you would like to subscribe to your Home Calendar from another calendaring application, such as Outlook or Google Calendar, click the **Publish (Private)** button to generate a URL that can be used to set up your subscription.
Click Generate.

Copy the URL and use it in your desired calendar client.
What is the Home Information Display?

In the Home area may be customized by your institution to display information for all users. The Home Information Display often contains static information, unlike the announcements which may change more often in the Message of the Day.

View the information display.
What are the Home Recent Announcements?

The Recent Announcements area in Home displays announcements from all of the sites in which you are enrolled. You may use the drop-down menu to view All items, Public items only, or items By Group. (You must be a member of a group in order to see group announcements.)

View recent announcements.
Customize announcements display. (Optional)

You may select either All, Public, or By Group from the View drop-down menu to customize the display.

Note: By default, you will only see announcements that have been posted within the last 10 days in this location. (If you wish to see announcements posted within the past year, you should click on the Announcements link in the Tool Menu.)
What are the Home Message Center Notifications?

The Message Center in Home displays the count of Messages and Forum posts for all of the sites in which you are enrolled. New messages are indicated by a number and envelope icon. If there are no new messages or posts, the word "none" will be displayed.

- Clicking on the title of the site will take you to the homepage for that site.
- Clicking on the New Messages indicator will take you directly to the Message Inbox for that site.
- Clicking on the New in Forums indicator will take you directly to the Forums for that site.

View Message Center.
Customize message center display. (Optional)

You may click on the **Options** button to customize the list of sites displayed in the Message Center area.

**Choose sites to hide in this list and then Update.**
Click in the **Don't Show** box to place a check mark next to any sites that you prefer not to see in the Message Center list and then click **Update**.

*Note: If you have already hidden sites in Preferences, they will not show up in this list.*
What is Membership?

The Membership tool in Home displays the list of sites in which a user is currently enrolled. Users may search their enrolled courses or enroll in a joinable site from the Membership tool.

*Note: Unpublished sites are only visible to site managers (i.e. instructors or admin users).*

Go to Membership.

Click on the **Membership** tool in the Tool in Home to access your list of sites.
Viewing current sites.

You will see a list of all the sites in which you are currently enrolled.

1. You may sort by Worksite title by clicking on the column heading.
2. You may also search your list of sites by keyword. This is useful if you have many sites and would like to limit the list by a specific criteria.

Viewing Official Course Enrollments.

Select **My Official Course Enrollments** to see a list of all the sites in which you are officially enrolled by your institution's registrar or student information system.
Joining Sites.

1. If you would like to view and join sites that are open for self-enrollment in the system, click on the **Joinable Sites** tab.
2. You may click on the **Join** link to enroll yourself in any of the joinable sites listed.

*Note: Joinable sites may or may not be available depending on the enrollment procedures determined by your institution.*
Unjoining sites.

If you join a site by mistake, or you no longer wish to be a participant in that site, you may unenroll yourself from the site by:

1. Selecting the check box next to the site name.
2. Clicking on the Unjoin button.

Note: You may only unjoin, or unenroll, from sites in which you have self-enrolled.
How do I view and edit my account details?

Your account details include your User Id, Name, Email, and Password for the system. In most cases, this information is automatically populated by your institution's student information system. However, if you have permission to change your Sakai password, this is where you would do it. You may also update your name and email address here if desired.

*Note: If this information is being updated automatically by the institution, any changes you make here may be overwritten, depending on the user permissions allowed by your institution.*

Go to Account to view and edit details.

Click on the **Account** link in your Home Tools Menu.
Modifying account details.

Click on the **Modify Details** button.
Changing your name, email or password.

You may change any of the editable fields on this page. The password fields always appear blank upon accessing this screen. You must enter your current password in order to save any changes. You may change your Sakai password by entering your current and new passwords in the fields provided. (Leave the "new" password fields blank to keep your current password.) Changing your password here will change it for all of your sites on this system. Once you have entered your changes, select the **Update Details** button to save the change and return to Home.

*Note: Your Sakai User Id cannot be changed. Your User Id can only be modified by a Sakai Administrator at your institution.*
What is Worksite Setup?

The Worksite Setup tool provides information about the sites to which you currently belong or may join. If you have a role that allows it, you can use this tool to make changes to information about the site, tools available in the site, and access to the site. You can also publish the site using the Worksite Setup tool.

Many of the functions of the Worksite Setup tool mirror those of the Site Info tool; Worksite Setup is available through Home, whereas Site Info is available in each site.

If you don't have the appropriate permissions, you will only see the information about the site published by the site owner in Worksite Setup.

To access this tool, click Worksite Setup from the Tool Menu in Home.
What is the Preferences tool?

In Home, you can set preferences for how often you receive email notifications of site activity, set your time zone, and select your language. You can also hide sites from your list of active sites.

Go to Preferences.

Select the Preferences tool from the Tool Menu in Home.

Notifications.

To customize your notification settings, click the Notifications tab.
Select notification preferences.

You may choose from the following options for low priority email notifications in the Announcements, Resources and Drop Box, Email Archive, Syllabus, and Tests & Quizzes tools.

- Do not send me notifications.
- Send me one email per day summarizing all notifications.
- Send me each notification separately. (Default setting)

If you change any of these settings, click Update Preferences to save your changes.

*Note: These settings only apply to low priority items. High priority items will still be sent via email regardless of your settings here.*

Time Zone.

To set your local time zone, click the Time Zone tab.
Choose your time zone.

Select your local time zone from the list, and then click Update Preferences.

Language.

To set your preferred language, click the Language tab.
Choose your language.

Select your preferred language from the list, and then click Update Preferences.

Sites.

The Sites tab allows you to select your preferred site tab display format, as well as hide sites from the site drawer.
Site Tab Display Format.

Site Tab Display Format

Show tabs as:
- **Site Title**
- **Site Short Description**

Select either **Site Title** or **Site Short Description** as the display format for the site tabs in the site navigation bar at the top of the screen.

Hiding sites.

To hide one or more of your active sites, click the **Sites** tab.

Hidden sites will show up in your list of all enrolled sites in tools such as Worksite Setup and Membership; however, they do not appear in the top navigation bar or in your Sites drawer.

*Note: Hidden Sites are still active in the system, and are still available to other enrolled users regardless of individual site display preferences.*

Select the sites you want to hide, then click Update Preferences.
Editor.

This tab allows you to set your preference for the Rich Text Editor toolbar throughout the system.

Choose your editor preference, then click Update Preferences.

Editor Options

- Default Rich Text Editor toolbar layout
- Auto detected based on browser size
- Force basic/mobile mode (Limited set of buttons and features)
- Force full/desktop mode (Full set of buttons, all features)

Update Preferences  Cancel Changes
What are the Resources in Home?

Resources are available in both Home and individual course sites. The Resources tool is site-dependent; the content uploaded in the Home area is private and visible only to the user (unless the user chooses to make items public).

The Resources tool in Home serves as a personal file space for the user to save, store, and organize files.

The features and functionality of the Resources tool are the same in any site where the tool appears. Please refer to What is the Resources tool? for more information on how to manage files using this tool.

Note: Your institution may limit the user file storage quota and/or access to Resources in Home.

To access this tool, select Resources from the Tool Menu in Home.

Tip: Users who would like to store large files in a single location may choose to store files in Home and link to them from their other course sites, rather than uploading them to multiple locations. Be sure to mark your files as Public if you plan to link to them from other sites.
Course and Project Sites
What are course sites?

A course site is the official worksite for a particular academic course for an institution and can be linked to a database (such as a registrar's) to automatically populate its roster.

Course sites usually contain a selection of tools and resources provided by the instructor so that students may access course materials, interact with other site participants, and submit work.

Default participant roles for course sites.

The default participant roles in a course site are:

- **Instructor**: Instructors have full permissions throughout the site, including the ability to publish the site and set its global access. Instructors can read, revise, delete, and add both content and participants to a site.
- **Teaching Assistant**: Teaching Assistants can read, add, and revise most content in their sections.
- **Student**: Students can read content, and add content to a site where appropriate.

*Note: Additional customized roles may be added by the system administrator.*
What are project sites?

Project sites are designed to facilitate collaboration. You can invite anyone you wish to join your project site.

Project sites are typically worksites where a project director, team, or committee can make announcements, engage in online discussions, and share resources such as documents or links to other web sites. Project sites have all of the same tools available as course sites; however, they are typically not associated with credit course sections or academic terms.

Default participant roles for project sites.

The default roles in project sites are:

- **Maintain**: The Maintain role has full permissions throughout the site, including the ability to publish the site and set its global access. The Maintain role can read, revise, delete, and add both content and participants to a site.
- **Access**: The Access role can read content and add content to a site where appropriate.

*Note: Additional custom roles may be added by the system administrator.*
How do I create a new course or project site?

If you have the appropriate permissions to create new course or project sites, you may do so from either Worksite Setup or Sites in your Home area.

Go to Worksite Setup.

Select the **Worksite Setup** tool from the Tool Menu in Home.

Click New.

Or, go to Sites.

Click on the **Sites** link to view your sites drawer.
From your sites list, click Create New Site.
For Course sites only.

Select course site, the term and site template. Then click Select Course.
Select the course.

Check the box to the left of the course name.

Note: If you select multiple courses or sections, they will be combined into one Sakai course site.

For cross-listed courses or sites with multiple rosters: choose ONE course in this list that has the most appropriate name for the course site (cannot be changed later). Additional rosters can be added after the site is created through Site Info, Edit Class Rosters.
Click Done.

For academic staff and TAs creating sites on behalf of faculty.

Select course from drop-down menus.

Add course(s) and/or sections(s) not listed above…
Click Continue.

Confirm you are an instructor or the instructor's delegate. **Students are not allowed to create course sites.** Type INSTRUCTOR in the text box to confirm.

Click Done.

A link to your new site will appear in a pop-up window. The site can be published immediately by clicking Publish Site.

Newly created sites show up automatically under the **Sites icon** and in the **Sites bar** under the Duke header.
For Project Sites Only.

Select project type. Click Continue

A site can be created in a number of different ways:

This is for experienced users and lets site owners add individual site tools.

- course site
- project site

You can add or remove tools from either type of site at any time.

[Images of a Create Site interface showing options to select course site or project site.]
Accept the terms of service. Select the purpose.

1. Review and accept the Terms of Service.
2. Indicate the purpose of the project site you are creating.
3. Click **Create Site** to finish.
Define your site.

1. Title your project site
2. Choose the default language.*
3. Provide a description for the site.
4. Enter the site's contact information.
5. Click Continue.

*If desired, you can change the default language for your site to any of the available languages listed. Languages in this list will vary depending upon the language pack(s) installed on your instance. Click on the desired language to select it.

The information entered into the description area will appear on the site's home page.
Select site tools.

Place a check mark next to any tools that you would like to use in the project site.

Re-use existing material.

You may choose to re-use material from other sites that you own. Choose either No or Yes for this option. (If you select Yes, indicate the site(s) from which to copy content in the list shown below.)
Click Continue.

Configure site access.

1. **Site Status**: Select to **Publish** the site, or **Leave as Draft** (i.e. unpublished). Unpublished sites are only visible to site owners, not other participants such as students.
2. **Additional Access**: In addition to enrolled users, you may also elect to allow all users of a particular origin or role to have access to your site.
3. **General**: Select the type of users allowed to access the site. You may choose either **Anyone** (which includes unauthenticated users) or **Logged in users**.
4. **Site Visibility**: Displays the current status of site's visibility in the site browser.
5. **Global Access**: Choose to make site access **Limit to official course members or to those I add manually** (recommended) or **Allow any user to join the site**.
6. Click **Continue**.
Confirm site setup.

You will see a screen which displays all of the site settings for verification. If everything appears correct, click **Create Site**.
How do I navigate among different sites?

Home.

Home is your individual online workspace. When you first log in, you go to Home automatically. To return to your workspace after visiting other sites, click Home in the upper left corner of the screen.

For more information about Home, see What is Home?

Site Navigation.

1. Additional course and project sites appear as buttons across the top of the screen. Click a button to go to the corresponding site.
2. You may also click on Sites to view all active sites and manage favorites. For more information about site navigation, see What is Site Navigation?

It is strongly recommended that you use the site navigation, and not the back and forward buttons in your web browser, to navigate among different sites in the system.

Note: If you are not yet a member of any sites, you will see only a Home button at the top of the screen.
How do I navigate within a site?

It is strongly recommended that you use the site navigation, and not the back and forward buttons in your web browser, to navigate within a site.

Currently selected site.

The currently selected site will appear highlighted in a different color in the site navigation bar.

The Tool Menu.

The Tool Menu is a customizable column along the left side of the screen with links for each available tool (e.g., Announcements, Forums, etc.). The number of links will vary depending on which tools were chosen for a site. Menu colors and icons may also vary depending on the theme or skin chosen for your site. The currently selected tool is highlighted in a different
background color than the rest of the Tool Menu and with a solid colored line showing along the left border of the item.

Click the tool's name to go to the corresponding tool.

**The Overview page.**

Overview on the Tool Menu takes you to the primary landing page for the site you're in. Overview pages can contain a list of recent announcements, recent message or forum discussions, calendar posts and other selected resources for that specific site.

**Resetting a tool.**

When you're using a tool, clicking on the tool's name in either the Tool Menu or the content frame takes you back to the first page of that tool and resets the tool to the landing page for the tool.
Online help.

You can get help by clicking Help in the Tool Menu. You can also get contextual help by clicking the Help link within the tool content frame.

Help in the Tool Menu.

Contextual help for a given tool.
How do I reset a tool?

Resetting a tool returns you to the starting point of the tool you’re using, as if you had entered the tool in a new session.

Click on the tool name.

When you're using a tool, clicking on the tool's name, in either the Tool Menu or the in the content frame, takes you back to the first page of that tool and resets the tool.

Note: If you return to the starting point of the tool before saving (e.g., before choosing to add, post, save as draft, etc.), you will lose any information you have entered.
What does Unpublished Site mean?

By default, most sites in Sakai are Unpublished when they are first created. This gives instructors or course designers a chance to go in and edit the content of the site before it is available to students and other users. Some institutions publish all current courses automatically at the beginning of the academic term. Institutions may also unpublish courses from prior or future terms.

Unpublished Site Indicator

If you see the Unpublished Site indicator at the top of your site, that means your site is unpublished and is unavailable to students, teaching assistants, or other user roles which do not have editing permission.

If the Unpublished Site indicator does not appear, this means that your site has already been published.

Instructors always have access to both published and unpublished courses in which they are enrolled.
Click the (Publish Now) button to make your site available to all enrolled users. (Depending on the site publishing permissions established by your institution, you may or may not see this button.)

*Note: You may also publish/unpublish your site from the Manage Access area in Site Info.*
Site Info
What is the Site Info tool?

The Site Info tool contains many of the course management features needed for instructors to customize and manage their courses. Instructors may edit and rearrange the tools on their course toolbar, add participants, manage groups, publish or unpublish their course, import content from another site, and track participant enrollment activity.

If you have limited site permissions (i.e. participant), you'll see only the site's description and your group memberships, if applicable, in Site Info.

*Note: The functions of the Site Info tool are also available through the **Worksite Setup** tool, which is available from the Tool Menu when you are in My Workspace.*

To access this tool, select Site Info from the Tool Menu of your site.

Select the **Site Info** tool from the Tool Menu of your site.
How do I edit the site information?

Go to Site Info.

Select the Site Info tool from the Tool Menu of your site.

Select Edit Site Information.

Select the Edit Site Information tab.

View Site Title and Term

* Site Title  
DAC-EDUCATION-DEPT1-SUBJ1-476

Term  
Spring 2018
Select site language.

If desired, you can change the default language for your site to any of the available languages listed. Languages in this list will vary depending upon the language pack(s) installed on your instance.

Click on the desired language to select it.

Enter a site description.

The information entered into the description area will appear on the site's home page. You may use the rich text editor here to enter your description.
Enter a short description.

You may also enter a short description (with a maximum of 80 characters). This short description will display in the publicly viewable list of sites.

(Optional) Set a site Icon.

Provide a URL link for a custom site icon if desired.

Enter the site contact information.

Enter the **Site Contact Name** and **Site Contact Email** for the site contact. (This is typically the site creator, owner, or instructor.)

Click Continue.

Click **Continue** to save your changes.
How do I add tools to my site?

Sakai has many different tools available to use in your course or project site. You may choose which tools you want to use and may add or remove tools at any point.

Go to Site Info.

Select the **Site Info** tool from the Tool Menu of your site.

Click Manage Tools.
Select your set of tools.

As you select tools from the General list on the left side of the screen, they are added to the Selected tools list on the right side of the screen. The right side of the screen displays the tools you have selected.

Below the Selected tools you can enable MathJax for specific tools in your site by checking the box. See more information on enabling LaTeX at How do I add LaTex language to my course site?

![Enable MathJax](select_tools.png)

In addition, you can enable Lessons subpage navigation in the left tool menu by checking the box. See How do I enable Lessons subpage navigation in the Tool Menu? for more information.
Add multiple instances of some tools. (Optional)

For some tools such as Lessons and Web Content, you can add multiple instances of the tool.

The Lessons tool may be used as a single tool on the Tool Menu where students click to see all Lessons, or there can be multiple Lessons tools added to the Tool Menu so that each tool is a separate Lesson. See the Lessons tool chapter for more information.

The Web Content tool points to any URL you enter and you may create as many of these as you want.

Click on the More Lessons Tools? or More Web Content Tools? drop-down menus to add additional instances of these tools.
Example: Multiple tool instances.

The example above shows three Lessons tools (Module 1, Module 2 and Module 3) and two Web Content tools (Sakai and Apereo).

Add Preconfigured External Tools.

If your institution has preconfigured any system-wide External Tools, you may click on External Tools section to expand the list, and select from the available items as needed.

Click Continue.

Continue  Back  Cancel
Once you have made all of your tool selections, scroll down and click the **Continue** button to save your customizations.

**Confirm tool selection**

You have selected the following for your site (added tools highlighted):

- Overview (Overview)
- Syllabus (Syllabus)
- Module 1 (Module 1)
- Calendar (Calendar)
- Announcements (Announcements)
- Resources (Resources)
- Forums (Forums)
- Assignments (Assignments)
- Tests & Quizzes (Tests & Quizzes)
- Sakai (Sakai) [http://www.sakaiproject.org](http://www.sakaiproject.org)
- Site Info (Site Info)
- Gradebook (Gradebook)
- Module 2 (Module 2)
- Module 3 (Module 3)
- Messages (Messages)
- Roster (Roster)

Aperico (Aperico) [http://www.aperico.org](http://www.aperico.org)

You have enabled the automatic rendering of LaTeX for this site

New tools added are shown in red font. Confirm that these are tools you want to add and click the **Finish** button. New tools are typically added to the bottom of the Tool Menu once you save your changes. See the [How do I rearrange or rename the items in the Tool Menu?](#) tutorial for instructions on how to change the tool order.
How do I rearrange or rename the items in the Tool Menu?

The Tool Menu can be customized by the instructor of the course to modify the order or appearance of menu items in the site. Tools can be renamed, hidden from students, locked, or deleted.

Go to Site Info.

Select the Site Info tool from the Tool Menu of your site.

Click Tool Order.

Click Tool Order from Site Info tabs.
Drag and Drop items to rearrange the tool order.

1. Drag and drop tools to rearrange the order of tools in the menu.
2. Click **Save** at the bottom of the screen to save your reorder.

**Sort tools alphabetically.**

Click the **Sort Alphabetically** button at the bottom of the page to arrange all of the tools in alphabetical order by title.
Rename a tool.

Click the gear icon to go to the tool settings. Then, select Edit Tool Title from the drop-down menu.

Type the new name for the tool.

In this example, the Sakai tool was renamed as Sakai Project Website. Click the green check mark to save your changes.

Hide a tool from students.

Hiding a tool from students allows them to access the tool from other areas of the site, but they do not see it listed in the Tool Menu.
Click the gear icon to go to the tool settings. Then, select **Make Tool Invisible to Students** from the drop-down menu.

**Invisible tools are indicated by a "hidden" icon in the menu.**

In this example, the Resources tool is hidden from students. But instructors see the tool as gray and italicized with a "hidden" icon to the right of the tool.

**Lock access to a tool.**

Locking access to a tool disables it for student use. Students will not see it in the menu, and they also will not be able to access that tool from other areas of the site.

Click the gear icon to go to the tool settings. Then, select **Lock Access to this Tool** from the drop-down menu.

*Note: Not all tools are lockable. If the tool cannot be locked, that option will not appear in the drop-down menu.*
Locked tools are indicated by a "padlock" icon Tool Order list.

In this example, the Calendar tool is locked with a padlock icon to the right of the tool.

Locked tools are hidden by default in the site Tool Menu.

In this example, the Calendar tool is both hidden and locked. Instructors see the tool as gray and italicized with a "hidden" icon to the right of the tool, but students do not have access to the tool so they do not see it in the menu at all.

Delete a tool.

Deleting a tool has the same affect as removing a tool using the Manage Tools option in Site Info. It will remove the tool from the menu and deactivate it in the site, but it will not delete any content that exists within the tool.
Click the gear icon to go to the tool settings. Then, select **Delete this Tool** from the drop-down menu.

*Note: Not all tools can be deleted. If the tool cannot be deleted, that option will not appear in the drop-down menu.*

**Save your work.**

![Save, Cancel, Sort Alphabetically buttons]

Once you have completed all of your changes, click the **Save** button at the bottom of the list.
How do I add participants to my site?

Student enrollment for registered courses is handled automatically through integration with DukeHub. However, site owners can add other participants such as TAs, Designers, etc., to their site using Toolkits. Toolkits allows you to add participants to your course or project site who are *not in an official course roster*. This includes people with a Duke NetID and visitors.

Go to Site Info.

Select the **Site Info** tool from the Tool Menu of your site.

Click Add Participants.

Course sites

Click **Add Participants** from Site Info tabs.

The process of creating an initial participant list is automated, but it will take a minute for the Toolkit for the course site to load.

One moment... Toolkits is accessing the current list of participants. This can take a minute. 😊
**Project sites**

You will need to first choose a name for the Toolkits community and then hit Create.

---

**Please create a new Toolkits community**

Name: testtoolkits

Example WordPress url:
https://sites.duke.edu/adhoc_testtoolkits

Example Duke Mailing list address:
adhoc-testtoolkits@duke.edu

Create

When the Toolkits creation process is complete, you have two options to add new site participants.

**Add a participant (both Duke and non-Duke)**

To add a participant to your site, search for them by name using either the firstname and lastname, NetID, or email address. When the results come back, choose the button next to the correct participant.

Use the drop-down menu to choose the role of the user in your site.
**TIP:** The visitor role is mainly read-only access and is usually the most appropriate when inviting a guest to join your site. The instructor may fine-tune the permission settings in most tools.

Once you’ve found the user and chosen a role for them, scroll down and find and click the Add button.

**Adding non-Duke users**

If your guest already has a Duke Guest account you will be able to select their name from the search results and simply choose their role in your site. To finish the process, click the Add button below.

If your search provides no results, you may invite the guest participant to create an account at Duke. In the email box, type the email of the person you would like to add as a guest and click send.

The guest will receive an invitation via email from toolkits@duke.edu with the subject “An Invitation to Create a Duke OneLink Account”. The instructor or site owner also receives a copy of this invitation as a confirmation the invitation has been sent. Once the registration process is complete, guests should contact the site owner with their account details, such as the name and email address they used to create the account.
NOTE: It can take up to 1 business day to validate a new guest account created through OneLink.

Learn how to activate a Duke guest account.

**Batch add users**

If you have a large number of participants to add who will all be assigned the same role, you can use batch add. Type the NetIDs one per line. Select a role and click **Add**.

Once you have added new participants in Toolkits, you should see their names and roles listed on the main screen. Participants who were imported from the course roster (from the official Student Information System, aka SIS) will also appear here and have Sakai role names (like instructor or student) instead of Toolkits role names (like Manager or Auditor). These are equivalent roles and will be displayed correctly in your Sakai participants list. Any applications you add with Toolkits will now include the users you have added. Each member will be given access to different tools with a role that is appropriate for that tool.

If you have a large number of participants to add who will all be assigned the same role, you can use batch add. Type the NetIDs one per line. Select a role and click **Add**.

(For more information about the roles in other tools, see the Toolkits help pages (you'll need to login with your netID.).)

**Confirm addition of participants.**

Review the list of site participants and their roles to confirm that they will be added to your site. If the information is correct, click the **Finish** button.
How do I remove users from my course or project?

Note: Sakai does not destructively delete user data when removing users from a site. Therefore, if you remove a user from your site, and then later reinstate that user, all of the user's activity within the site will remain intact once you add the user back into the course or project.

Go to Site Info.

Select the Site Info tool from the Tool Menu of your site.

Select Manage Participants.
Remove user(s).

1. In the **Remove?** column, check the box in the row for the user(s) you want to remove from your site.
2. Select **Update Participants** to remove the selected user(s).

💡 Tip: You can remove all users from the site by checking the box at the top of the column right next to the **Remove?** column header. However, be sure that you uncheck yourself so you don't remove your own access!
How do I add a class roster?

Note: Permissions for adding or deleting rosters in a given site may vary depending on your system’s institutional enrollment implementation. In most cases, adding rosters by class or section is subject to automated roster updates.

Go to Site Info.

Select the Site Info tool from the Tool Menu of your site.

Select Edit Class Rosters.

Select the Add Roster(s) link.

There is no class assigned to the site DAC-EDUCATION-DEPT1-SUBJ1-201 yet. Add Roster(s)
Select the term and class(es).

From the **Academic Term** drop-down menu, select the appropriate academic term.

If you are listed as the instructor of record for certain courses in your course catalog, those courses and their sections will be listed. Check the box next to the roster you want to include.

**Or, select to add courses not listed above.**

Click the link to **Add course(s) and/or section(s) not listed above...**
1. Select the **Subject**.
2. Select the **Course**.
3. Select the **Section**.
4. If you are not listed as the instructor of record for a course, enter the instructor’s username. An email message requesting the instructor’s authorization for the site will be sent.
5. You have the option of adding any information that may facilitate the authorization of your site request.
6. Click **Continue** to add the roster.

Tip: If you have more rosters to add, click on the **Save and add another section** link to add additional sections.
Select Add Class(es).

Request Site Access: DAC-EDUCATION-DEPT1-SUBJ1-201...

Please confirm the addition of the following sections to your class site.

Class Information

The following class(es) were already assigned to this site:

You have indicated the following class(es) to add to this site:

Discussion 1 SMPL101 (Requested)

Add Class(es)  Back  Cancel

Review your request and select the Add Class(es) button.
How do I delete a class roster?

Note: Permissions for adding or deleting rosters in a given site may vary depending on your system’s institutional enrollment implementation. In most cases, adding rosters by class or section is subject to automated roster updates.

Go to Site Info.

Select the **Site Info** tool from the Tool Menu of your site.

Click **Edit Class Roster(s)**.

Click **Edit Class Roster(s)** from the tabs.
Select roster to be deleted.

Place a check mark in the **Remove** column for the roster(s) you want to delete.

**Click Remove Selected.**

Click the **Remove Selected** button.
How do I create groups?

You may create groups in your site in several different ways:

• Manually create and assign users to a group.
• Create joinable groups that site participants can elect to join.
• Automatically generate groups by user role, number of groups per site, or number of users per group.
• Import group information from a file.

Once groups are created, group aware tools such as Assignments, Email, Resources, or Tests & Quizzes have options for restricting access by group.

Go to Site Info.

Select the Site Info tool in the Tool Menu of your site.

Click on Manage Groups.

Manually create a group.

Select Create New Group.
1. Enter a **Group Title** for the group.
2. Enter a **Description** of the group. (Optional)
3. Check the box for **Allow members to see the other members of this group** if you want students to be able to see the names of their group members.
4. You may use the **Filter by group** drop-down menu to filter the site member list by another group or section. For example, if you have two sections combined into one site, and you want to set up groups of students within sections, you could filter the view by section to make assigning students easier. *(Note: You must have existing groups/sections for them to show up in this list.)*
5. If you would like this group to be part of a **Joinable Set**, select the set from the drop-down menu. *(Note: You must have existing joinable groups for them to show up in this list.)*
6. In the **Membership** section, click on a user or users names to select participants from the **Site Member List**. Then select on the right arrow button > to move the selected participant/s over to the **Group Member List** area.
7. Once you have selected all of the desired group members, click on the **Add** button to create the group.

⚠️ **Tip:** You may select more than one name at a time in the participant list by using **SHIFT+Click** to select a range of consecutive names, or **CTRL+Click** to select more than one non-consecutive name.
Create a joinable group.

Select **Create New Joinable Set**.

**Specify the joinable set details.**

1. You will need to enter a **Set name** for the set of groups. Each group will begin with the same name and end with a unique number.
2. Indicate the **Number of groups**.
3. Enter the **Max members per groups**.
4. Click **Add** to create the joinable set.

Optionally, you may also select any of the following options:

- Allow users to see group membership before joining
- Allow members to see the other members of these groups after joining
- Allow members to unjoin (leave) groups in this set after joining

*Note: Students will need access to Site Info to see and join any joinable sets of groups.*
Automatically generate groups.

Select **Auto Groups**.

### Create groups by role.

#### Create New Group(s)

Please select course rosters or roles to create a group for each selected item. If you select a single roster or role from the respected table, you can create randomized sub-groups from the members of that item.

#### From Roles

<table>
<thead>
<tr>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
</tr>
<tr>
<td>Teaching Assistant</td>
</tr>
<tr>
<td>Student</td>
</tr>
</tbody>
</table>

To create separate groups for different user roles in the course, select one or more roles and then click the **Add** button.

*Tip: Click the **Role** checkbox to select all roles at once; click again to de-select.*
Create random groups by number of groups.

1. Select a single role from which to create subgroups (e.g. Student).
2. Select the **Create random groups from members with selected role** radio button.
3. Select the **Split by number of groups needed** radio button.
4. Enter a **Group Title**. This title will serve as the basis for all of the group names. Unique numbers will be appended to the title.
5. Enter the **Number of groups** you would like to have for the site. Users will be randomly assigned to each group and distributed as equally as possible.
6. Click the **Add** button to auto-generate your groups.
Create random groups by number of users per group.

1. Select a single role from which to create subgroups (e.g. Student).
2. Select the Create random groups from members with selected role radio button.
3. Select the Split by number of users needed per group radio button.
4. Enter a Group Title. This title will serve as the basis for all of the group names. Unique numbers will be appended to the title.
5. Enter the Number of users per group you would like to have. Users will be randomly assigned to each group and the number of groups is determined by the class size divided by number of users per group.
6. Click the Add button to auto-generate your groups.

Bulk Creation.

Select Bulk Creation.
Provide group information.

There are two methods to create or update multiple groups at once:

1. Type or paste the group information into the text box provided.
2. Click the **Choose File** button to browse for and select your import file.
   - Your import file should be in comma-separated (CSV) format with two columns of data. The first column should contain the group title, and the second column should contain the username of the site participant. Do not include a column header row and do not include spaces.
3. Select **Continue** to proceed with group creation.

**Example: CSV file for importing groups**
How do I use groups?

Groups are subsets of participants for a given site. Groups can be created on an ad-hoc basis by instructors in course sites or by owners or administrators in collaboration sites. Groups are useful to organize study groups, project teams, and other non-official subsets of site participants. In course sites, each course roster section behaves like a group. i.e., group-aware tools recognize the section as a group.

You can use groups to make site content available to specific site participants. For example, a private announcement can be made available to a group and email notification can be sent to members of that group. You can also use groups to create group assignments, or limit access to a test or quiz with settings for specific groups.

For information on creating and editing groups, see How do I create groups?

Note: If an assignment or assessment has been released to specific groups, changing which groups have access to the assignment, or modifying/deleting a group after students have begun work is not allowed.

Which tools use groups?

You can use groups with the tools listed below. The descriptions of how groups can be used are linked to Help articles that show how to enable group access.
Announcements

Access

- Only members of this site can see this announcement
- This announcement is publicly viewable
- Display this announcement to selected groups only

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 1</td>
<td></td>
</tr>
<tr>
<td>Group 2</td>
<td></td>
</tr>
<tr>
<td>Group 3</td>
<td></td>
</tr>
</tbody>
</table>

Post announcements for specific group(s).

Assignments

1. Access (also limits groups for group submissions)

- Display to site
- Display only to selected groups

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 1</td>
<td></td>
</tr>
<tr>
<td>Group 2</td>
<td></td>
</tr>
<tr>
<td>Group 3</td>
<td></td>
</tr>
</tbody>
</table>

2. Additional Assignment Options

These additional options cannot be modified after the assignment has been posted for students.

- No additional assignment options
- Use peer assessment
- Group Submission - One submission per group
1. Create group assignments, where one member of the group submits on behalf of the group (pictured above).

2. Restrict access to an assignment to specific groups.

Note: If an assignment has been created as a group assignment or released to groups, changing the groups who can submit it, or modifying or deleting a group after students have begun work on the assignment is not allowed.

Forums

Automatically Create Topics

- Create one topic
- Automatically create multiple topics for groups

An instance of this topic will be created for each group selected below. Permissions are configured automatically. (More?)

- Group 1
- Group 2
- Group 3

Automatically create multiple topics for groups.
Messages

**Messages / Compose**

**Compose a Message**

*Required items marked with *

*To

- [Add Rec]
- Send Cc
- Label
- Subject

Click here to select recipients

- All Participants
- Instructor Role
- Student Role
- Teaching Assistant Role
- Group 1 Group
- Group 2 Group

Send a private message to a specific group.

Resources

- Display this folder and its contents to selected groups only.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 1</td>
<td></td>
</tr>
<tr>
<td>Group 2</td>
<td></td>
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<tr>
<td>Group 3</td>
<td></td>
</tr>
</tbody>
</table>

Limit access to file(s) and folders to specific group(s).
Calendar

Display to selected groups

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
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<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Group 1</td>
<td></td>
</tr>
<tr>
<td>Group 2</td>
<td></td>
</tr>
<tr>
<td>Group 3</td>
<td></td>
</tr>
</tbody>
</table>

Schedule events for specific groups only.

Sign-up

Available To:

- SMPL101 Spring 2018 (Current Site)
- Group 3
- Group 1
- Group 2

Set up office hours or meetings which are visible only to specific group(s).

Tests & Quizzes

Assessment released to

Selected Group(s)

1. Limit access to a test or quiz for specific group(s).
2. Set time or date exceptions on a test or quiz for specific groups.
Create and edit groups.
How do I control site access?

Go to Site Info.

Select the Site Info tool from the Tool Menu of your site.

Click Manage Access.

Select your Site Status (i.e published or unpublished).

Published

Published sites are available to all site participants and appear in their site tabs and lists.
If the site is left as draft, or unpublished, only instructors/site owners may access it and students will not see the site in their list of sites. Throughout the site, instructors will see the Unpublished Site banner and can use the Publish Now button to quickly publish a site, without going through Site Info.

**Designate additional access.**

You may also allow other users to access your site according to their authentication origin or role. Enable access for the following groups by checking the box to the left of the group:

- **Anyone** (including non-logged in)
- **Logged in users**

Checked users can access your site without being enrolled.
Site Visibility.

If site visibility is set to **Display in Site Browser**, all people with access to the Sakai system may search for your site from the Worksite Setup tool. If set to **Private**, your site will not show up in a search.

Select your Global Access setting (optional).

In most cases, site owners keep the default value for **Limit to official course members or to those I add manually (recommended)**. This will restrict enrollment to people that you add manually or that are enrolled automatically from your institution's registration system.

If the site is set to **Display in public site list** (above) AND the option **Allow any Sakai user to join the site** is selected, anyone in your system may search for and join your site.
How do I link to a parent site?

Parent sites can be useful in managing large courses with many sections, or a program that has a central site.

For example: Course ABC1234 has 15 sections. There are three TAs in this course who are each managing five sections. There can be a parent course called ABC1234 and then three child courses (Sections 1234,2345,3456; Sections 4567,5678,6789; Sections 7891,8912,9123). TAs are assigned only to the sections they manage. The content, announcements, communications, etc., can take place at the parent course level. Graded items and gradebooks will be housed at the child course level.

Or another example: The Nursing program has a site where all nursing students get information and communicate with program administrators. This site would be the parent site and each of the 15 Nursing courses can be child courses to the parent site.

Note: Participants will only access the sites in which they are enrolled. So in the Nursing example above, students would only see the nursing courses in which they are enrolled, and the parent site. They would not see the other Nursing child courses in which they are not enrolled. In the ABC1234 example, students would only see their own child courses and the parent site, not all three child courses.

Go to Site Info.

Select the Site Info tool from the Tool Menu of your child site that you want to link to a parent site.
Click Link to Parent Site.

Click **Link to Parent Site** from Site Info tabs.

**Select the parent site from the drop-down menu.**

Click **Set Link**.

Review the parent course you selected, then click the **Set Link** button.
Example: Child sites in the parent site.

For Instructors: In the parent site, the child courses show up in the Tool Menu and can be accessed by their links.

For Students: In the parent site, only the child course the student is enrolled in shows up in the Tool Menu and can be accessed by its link.

Example: Parent sites in the child site.

In the child site, the link to the parent site appears in the breadcrumbs.
How do I make my site publicly available?

Go to Site Info.

Select the Site Info tool from the Tool Menu of your site.

Click Manage Access.

In the General section, select Anyone (including non-logged in), and then Update.
This will allow anyone (including unauthenticated users) to access the site, either through the Site Browser or via a URL link to the site.
How do I copy my content from one site to another?

When you create new Sakai sites, you may want to copy content such as Lesson pages, Resources, Announcements, and Assignments from an older site into your new site. The Import from Site tab in Site Info allows you to select content from one or more tools from an older site and copy the content into the new site.

Navigate to new, empty site where you would like to copy the content.

Be careful to select the empty course shell that will be the destination for the content you are about to copy. (You do not want to overwrite an existing course with a blank site, as this will delete your content.)

Select the Site Info tool in the Tool Menu.

Select the **Site Info** tool from the Tool Menu of your destination or new site.
Select Import from Site.

Click **Import from Site** from Site Info tabs.

**Click the "I would like to replace my data" link.**

Selecting the **I would like to replace my data** option will transfer your site content, as well as your Gradebook settings. Note that choosing this option can be a destructive process, since existing content in the new course may be overwritten and replaced with your copied content.

**Tip:** If you have existing content that you do not want to overwrite, choose the **I would like to merge my data** link instead.
Select the course you want to copy from.

Select the site you want to copy content from from the list of sites.

**Click Continue.**

Click the **Continue** button.
Choose the material you would like to copy.

1. Use the checkbox at the top of the right column to select content from all tools.
2. Alternatively, you can check the boxes to the right of each tool to select specific tools to be copied.

If a tool is not active in the current site, the tool will have a + mark to indicate that it will be added to the current site if selected for import.

*Note: For each tool selected, all of the content for that tool will be copied into the new course.*

**Click Finish.**

Once you have made your tool selections, click **Finish** to complete the import.

*Note: The content import process may take a while depending on how much content you have, or if your institution has a queue for course imports on the server. Please wait for the process to finish.*
How do I add LaTeX language to my course site?

Sakai can display LaTeX equations as mathematical notation in the rich text editor. Using LaTeX options, instructors and students can simply write LaTeX in an enabled tool and the resulting equation will be displayed beautifully.

Go to Site Info.

Select the Site Info tool in the tool menu of your site.

Click on Manage Tools

Click on the Manage Tools tab.
Select the check box to enable MathJax.

Below the Selected Tools list, check the box to Enable MathJax for automatic rendering of LaTex and Asciimath in this site.

Scroll down and click Continue.
Click Finish to confirm the change.

Enter LaTeX equation in rich text editor.

Insert "$$" before and after mathematical equation to set it apart from the rest of the text. Math equations are editable in the edit screen of the tool, but will display as equation in preview and student view.
Equation displays as expected when viewed.

Explain this equation:

\[ x = \frac{-b \pm \sqrt{b^2 - 4ac}}{2a} \]
How do I remove a tool from my site?

There are two locations in Site Info where you can remove tools from your site: Manage Tools and Tool Order.

Go to Site Info.

Select the Site Info tool from the Tool Menu of your site.

Remove a tool using Manage Tools.

Click Manage Tools.
Uncheck the box next to the tool or tools to be removed.

OR click the X icon to the right of a tool in the Selected tools list.
Alternatively, you can use the *Selected tools* list to remove tools. Click the **X icon (Remove)** to the right of a tool to remove it.

**Click Continue.**

Once you have deselected the tools, scroll down and click **Continue**.

**Confirm tool selection.**

Tools to be removed will be listed at the top of the screen. Tools you have selected to keep in your site will be listed below them. Click **Finish** to confirm that these are the tools you want.
Remove a tool using Tool Order.

Click Tool Order.

Select to delete the tool.

1. To the right of a tool to remove, click the cog icon.
2. From the drop-down menu, select Delete this tool.
Confirm removing the tool.

You'll be prompted to confirm that you want to remove the tool from the site. Click **OK** if you are sure you want to remove it.

**Click Save.**
How do I hide or show items in the Tool Menu?

The Tool Menu can be customized by instructors or site administrators to modify the appearance of menu items in the site, including hiding or showing tools to site participants.

Go to Site Info.

Select the Site Info tool from the Tool Menu of your site.

Click Tool Order.
Hide a tool from site participants.

1. Click the gear icon to the right of a visible tool.
2. Select Make Tool Invisible to Students.

Example: Tool Menu with hidden tools

Hidden tools display for instructors and site administrators in italics, in light gray, with an eyeball with a slash icon (Hidden from site members). In the example pictured above, the instructor sees several hidden tools, while students do not.
Using content in hidden tools

To organize activities and make it easier for students or site members to access site content, you can use visible tools in your site, such as Lessons, to link to or embed items from hidden tools.

For example, if you hide the Resources tool in your site and upload an article PDF to Resources, you can create a lesson page and use the Add Content Links option to link to the article and make it available to students. You can also embed images on pages using the Rich-Text Editor.

Note:

• The Tests & Quizzes tool must be visible to make feedback available to students; Tests & Quizzes feedback cannot be accessed via links in other tools.
• The Site Info tool must be visible to use joinable groups; students or site members join groups via the Site Info page.

Example: Image from hidden Resources tool embedded in a lesson page

Student view of Tool Menu and lesson page

Pictured above is a site’s Tool Menu and lesson page, where Resources is hidden. The lesson page includes an embedded image which is stored in Resources.
Instructor view of Tool Menu and Resources

Pictured above is the instructor's view of the Tool Menu with hidden tools and the image file's location in Resources. The instructor has hidden Resources so that students will not be confused about where to find course materials - lesson pages with embedded and linked content guide students to specific tasks.

Show a currently hidden tool to site participants.

1. Click the gear icon to the right of a hidden tool.
2. Select Make Tool Visible to Students.

Lock access to a tool.

1. Click the gear icon to the right of a hidden tool.
2. Select Make Tool Visible to Students.
Tools can be **locked** so students or site members cannot access ANY content in the tool. Locked tools display on the Tool Order page with an *eyeball with a slash* icon (*tool is hidden from normal users*) AND a *lock* icon (*tool is disabled for normal users*).

1. Click the **gear** icon to the right of a tool.
2. Select **Lock Access to this Tool**.

**Click Save.**

![Save button](image-url)  |  ![Cancel button](image-url)  |  ![Sort Alphabetically button](image-url)
Roles and Permissions
What are Permissions and Roles?

Permissions

Permissions allow users to access certain features of a course or project site, depending on their roles, and on the decisions made by the site owner and the system administrator.

Roles

Roles are collections of permissions. Some roles allow users to simply access or read content, while other roles allow for advanced changes, such as adding participants, editing the site's content, and changing permissions for other roles.

When you create a site, or when one is created for you, you have the role with the most permissions and the broadest level of access. You can choose (within the limits established by the system administrator) which tools or functions (e.g., Forums, Calendar, Resources) you want the site to have. For many of these tools or functions, you can set permissions that allow or prevent users from seeing or performing certain tasks, depending on their roles.

Roles may vary in name, depending on the application. However, in general, the creator of a project site, or the instructor of a course site, has full permissions, and can add or delete content within a site.

A user who joins an existing site has a more limited role. The permissions of this role allow for interaction in the site (e.g., creating Chat messages), but do not allow for advanced tasks (e.g., uploading files into Resources or creating assignments).

However, each implementation of the application will be different. System administrators can decide during implementation which roles to install, and which permissions these roles will have.

Some things to remember:

- The availability of a tool in a site depends on the particular implementation of the system administrator. If you have broad rights to a site, and find that a tool is not available through Site Info, consult your administrator.
- The Resources and Drop Box tools share the same permissions set. You can modify them in the Resources tool.
- Default roles have default permissions. These defaults can be edited on the system level by the system administrator, and on the site level by anyone with full permissions to the site.
- All users are assigned the broadest role in their respective Home areas to give them editing control.
Default participant roles

The following default roles are available in course and project sites:

Course sites

- **Instructor**: Instructors have full permissions throughout the site, including the ability to publish the site and set its global access. Instructors can read, revise, delete, and add both content and participants to a site.
- **Teaching Assistant**: Teaching Assistants can read, add, and revise most content in their sections.
- **Student**: Students can read content, and add content to a site where appropriate.

Project sites

- **Maintain**: The Maintain role has full permissions throughout the site, including the ability to publish the site and set its global access. The Maintain role can read, revise, delete, and add both content and participants to a site.
- **Access**: The Access role can read content and add content to a site where appropriate.

Custom roles.

Many institutions create custom roles with specific sets of permissions for their local systems. Custom roles must be created by a system administrator using the Realms tool.
How do I change participant roles within a site?

Note: To complete these steps, you must be assigned a role having the necessary permissions within the site.

Click Site Info in the Tool Menu of the site.

Change the role from the drop-down menu in the list of enrolled participants.

Below your site's information, you will see its participant list.
1. Next to the participant whose role you want to change, select the appropriate role from the drop-down menu under "Role".
2. Click **Update Participants** to save your change.
Logins and Guest Accounts
How do I login to Sakai?

Duke students, instructors, and staff should log into Sakai with their NetIDs. After going to the Sakai website, you will see the NetID interface. Fill in your NetID and Password and click "Log in".

When you login to access services at Duke using your NetID, you will go through an electronic authorization process to confirm your identity. If you encounter difficulty with your NetID, please Contact the OIT Service Desk.
How do guests create an account?

You can provide guest access to your course to someone without a NetID. First, the guest will need to set up a OneLink account.

Duke OneLink is a login service that allows people to use an existing online account (Google, AOL, Yahoo!, FaceBook or LinkedIn) to access Duke websites without needing to create new accounts or passwords. If they don't have any of those accounts or don't want to link them to Duke, they can also create a OneLink ID account that will provide them with a username and password to access Duke sites.

People can register for OneLink here.

Once the guest has a OneLink account, direct them to the Sakai website.

After going to the Sakai website, they will see a yellow box in the upper right-hand corner that says "Login to Sakai." Clicking on that box will bring up the OneLink interface. They can fill in the information they set up during the OneLink registration process and sign into Sakai.
Creating Accessible Content
Sakai is a Learning Management System created to assist faculty and students by providing online tools for communication, assessment, content delivery, etc.

Sakai is composed of sites, and each site has a number of tools selected by the site creator. There is also a special site, My Workspace, private to you, where you can access personal information and change your settings.

This document is assistive technology agnostic and will briefly describe the different areas of the interface, point out how they are implemented for accessibility, and go into more depth where extra assistance may be needed.

If you need specific help with your assistive technology, please contact your institution’s office for Disability Student Services and/or Information Technology Services.

For additional information visit the Accessibility Working Group on the Confluence Wiki.

Note: The content depicted in images on this page may differ from what you experience, due to your institution’s customization of Sakai.

This article describes the following:

- Desktop versus Mobile View in Sakai
- Organization of Sakai
  - Important Access keys for main navigation
  - Quick Access (Skip to...) links
  - Sites
  - Your profile picture and name (use this menu to Log Out)
  - Favorite sites list (on Desktop View)
  - Tool Menu for the current site
  - Expand/Collapse Tool Navigation (for sighted users, on Desktop View)
  - Content area
  - Access keys to navigate the content area
  - Footer

- Rich-Text Editor accessibility
- Instructions for enlarging screen elements, modifying colors/contrast
- How to get more help
If you need specific help with your assistive technology, please refer to your local institution's website to find contact information for groups who can assist you with accessibility accommodations.

Desktop versus Mobile View

Sakai has a responsive design to adapt to different screen sizes, so certain elements only display when an internet browser window is larger than 770 pixels in width. In the descriptions below, Desktop View will be used to refer to the display when an internet browser window is larger than 770 pixels in width. Mobile View will refer to the display on smaller windows.

Organization of Sakai

Always present in Sakai are the following:

- Quick access Skip to... links
- One of the following two items, depending on whether or not you are logged into Sakai:
  1. Before logging in: Login links
  2. After logging in: the My Sites menu and your profile picture and name (a menu you access to Log Out)
- List of favorite sites (on Desktop View)
- Tool Menu for the current site
- Expand/Collapse Tool Navigation button (for sighted users, on Desktop View)
- Content area
- Footer

Important Access keys for main navigation

The major elements of a Sakai site can be accessed via Access keys (see note for more information on how to use Access keys):

Content - This access key takes you to the area that contains the site where you are working.

  - Landmark: main ("Jump to Content")
  - Access key: [C]

Tools - Every Sakai site has a Tool Menu with a list of links to the current site's tools.

  - Landmark: navigation ("Tools")
  - Access key: [L]

My Sites menu - After you log in, you can use this menu to access your active sites.
• **Landmark**: navigation (“My Sites”)
• **Access key**: [W]

**Note:** The exact keyboard commands to trigger an Access key depend on your computer operating system and internet browser. Commonly used browsers tend to use the following commands:

• Most Windows browsers: **Shift + Alt + [the Access key]**
• Most Mac browsers: **Ctrl + Option + [the Access key]**


**Quick Access (Skip to...) links**

**Location**: The quick access links are the first three links on the page. They are announced by text-to-speech software after the page title.

These links enable the user to reach frequently used areas of Sakai.

Pictured above is how one of these (normally invisible) links displays on the page if you navigate using the **Tab** key on your keyboard in Chrome after logging in to Sakai.

**Sites**

When logged in on Desktop View, the **Sites** menu follows the access key links, replacing the **Login** links.

On Mobile View, the **Sites** menu follows your profile picture and name (described below).

You can expand the **Sites** menu to access your active sites.
When logged in on Desktop View, your profile picture (which displays a silhouette of a student with a graduation cap by default) and name follow the Sites menu.

On Mobile View, your profile picture and name are at the top of the screen.

Selecting either your profile picture or name opens a menu with the following options:

1. Your profile picture and a Profile link that you can select to edit your picture or profile.
2. A My Connections link that will take you where you can search for, add, and manage your connections.
3. A Calendar link that will take you to your aggregated calendar for all enrolled sites.
4. A Preferences link that will take you to a page where you can edit your Sakai notifications, time zone, language, and active sites.
5. A Tutorial link to start the Sakai introductory tutorial (this tutorial also appears the first time you log into Sakai).
6. A Log Out link to log you out and take you to back to the Gateway page of Sakai.
Favorite sites list (on Desktop View)

- **Location:** On Desktop View only, the favorite sites list appears after your name.
- **Landmark:** navigation (“Sites list begins here ”)
- **Heading:** Level 1 (“Sites list begins here ”)

This list contains the links to sites you most commonly use. You can select which sites appear in the list by selecting them as Favorites from the Sites menu. Each favorite site’s tab will either take you to the site, or if you Tab into the menu and press the Down arrow key, supply you with a submenu of that site’s tools so that you can go straight to that tool on the selected site.

Using the Up and Down arrow keys, you can navigate the submenu to the site specific tool links. These links can be activated using the Enter key.

If you have a large number of favorite sites, only the first ten sites will display in this list.

**Tool Menu for the current site**
• **Location:** On Desktop View, the Tool Menu appears to the left of the screen. On Mobile View, it can be accessed by selecting **Tools** near the top of the screen.

• **Landmark:** navigation (“Tools list begins here”)

• **Heading:** Level 1 (“Tools list begins here”)

• **Access key:** [L]

Pictured above is the Tool Menu of a **Home** site, in both Desktop View and Mobile View.

Note: The **Help** tool will always be present as the last item in the Tool Menu no matter what site you are on. This enables quick access to the Sakai help documentation.

### Expand/Collapse Tool Navigation (for sighted users, on Desktop View)

![Expand/Collapse Tool Navigation](image)

**Location:** On Desktop View only, at the bottom of the screen underneath the Tool Menu is a button to collapse or expand the menu. When collapsed, the Tool Menu displays with icons only, no text.

The **Expand/Collapse Tool Navigation** button display switches between << (to collapse the Tool Menu) and >> (to expand the Tool Menu), depending on the state of the menu.

Note: Using the **Expand/Collapse Tool Navigation** button will have no effect on page navigation for users of screen reading software as all tools will still be available and announced.
The content comes after the Tool Menu.

- **Location:** On Desktop View, the content displays to the right of the Tool Menu. On Mobile View, the content appears underneath the **Tools** link.
- **Landmark:** main
- **Heading:** Level 1 “Content begins here”
- **Access key:** [C]

At the top of the content area for most tools, you will find:

1. The **title of the tool** you are currently viewing. This is also a **Refresh Tool** link that returns you to the main page of the tool when clicked. Pictured above is an example of an **Assignments** (**Refresh Tool**) link.
2. The title will be followed by a **Help** button, which opens a new tab or window (depending on your internet browser preferences) with help documentation for the current tool.

### Access keys to navigate the content area

Most content views use some or all of these Access keys:

- Delete, remove, or cancel - **Access key:** [X]
- Edit or revise - **Access key:** [E]
- Help - **Access key:** [0]
- Refresh - **Access key:** [U]
- Save - **Access key:** [S]
- View or preview - **Access key:** [V]

**Note:** The exact keyboard commands to trigger an Access key depend on your computer operating system and internet browser. Commonly used browsers tend to use the following commands:

- Most Windows browsers: **Shift + Alt + [the Access key]**
- Most Mac browsers: **Ctrl + Option + [the Access key]**
Rich-Text Editor accessibility

In most areas of Sakai where text can be entered, you can use the Rich-Text Editor to edit and format your text, and to add links, images, or media.

Steps to access the Rich-Text Editor's toolbar with a keyboard are included in What are some keyboard shortcuts for the Rich-Text Editor?

Instructions for enlarging screen elements, modifying colors/contrast

You can use the browser’s zooming function to increase text size. Sakai will work well with up to 200% zoom.

If you need a higher level of magnification, or if you need to have the cursor/pointer augmented, you may be more comfortable using a third-party magnifier such as MAGic (opens new window) or ZoomText (opens new window).

To change color and contrast settings, use the operating system settings, browser settings, or your preferred browser plug-ins.

Getting more help

If you need further help, please contact your local institution's accessibility support resources.
What does it mean to make content accessible?

Everybody experiences the world, including content they access on the internet, in their own way. How someone experiences content on the internet can be vastly different depending on the computer or device and size of the screen on which they view it, and how they interact with it.

For example, while some people read text and interpret images they view, others use assistive technology to listen to content using a screen reader. Meanwhile, some people click on links using a mouse or similar device, while others navigate using a keyboard or by tapping on touch screens.

Improving the accessibility of content is about reducing basic barriers to comprehension, such as providing alternative text for images, so that those who cannot see the images can grasp their meaning. Similarly, making captions or transcript text available for a video file can make it accessible to someone who cannot hear audio.

For more technical information about making content accessible, see [What are some guidelines for making content accessible?](#)

What does an example of inaccessible content look like?

The next section on this page contains a photograph with no alternative text. It is an example of very inaccessible content. The reasons why it is inaccessible will become apparent by the number of questions we need to ask and answer in order to understand its content.
What is depicted in the image below?

The photograph above depicts a title page of a book, which was published in 1682. Unless you're curious about this image, which is irrelevant to the topic at hand, you might want to skip to the next question: Why is the content of the image above inaccessible?

The book in the picture contains a play, titled *Le Menteur*, a French comedy written by Pierre Corneille.

At the top of the page in the photograph is a frontispiece, a picture of a scene from the play. This frontispiece contains some of the following information:

- There are four young people, two women and two men, in a park.
- The two men are positioned to the right of a fountain (the reader's left), and the two women to the left (the reader's right).
- One woman has tripped and nearly fallen. The other woman stands behind her. The woman in back is holding up her right hand, but it's not clear what gesture she's making; maybe she's motioning to stop her friend from falling. The standing woman holds a pair of gloves near her waist in her left hand.
- One man has caught the falling woman by her right hand, and is helping her up. In his left hand, he has taken off his hat and is holding it up, as if to greet the women. He is dressed in nice clothing.
- The other man, who is more plainly dressed, stands demurely behind the man who is helping the woman to stand.
- Behind the people and fountain are some bystanders. You can't tell if the people in the background are watching what the other four are doing.
Underneath the frontispiece is a decorative border that surrounds text. The text indicates the title of the play, that it is a comedy, and that it was written by Pierre Corneille: "Le Menteur / Comedie / Par le Sr. / P. Corneille."

**Why is the content of the image above inaccessible?**

Below are just some of the reasons why the image above might be inaccessible.

- All of the text included above regarding what the photograph contains is necessary for a screen reader user to get similar meaning out of it to what someone else might be able to interpret by looking at the image.
- There's no meaningful Alternative Text (Alt Text) on the image. A screen reader user might hear the image's file name, or nothing at all, where someone else might see an image.
- There's text on the page of the book, which must be typed out so a screen reader can present it to users.
- The image is small. It's in a format that doesn't allow you to zoom in on it to see it very well, so someone with vision impairment may have greater difficulty seeing or understanding it than someone else.
- The quality of the image is relatively poor. On a high-resolution screen, it may appear grainy or blurry.
- It doesn't have very good color contrast, and that may also make it harder for some users to see or read.

**What types of content are inaccessible?**

Certain types of content tend to be more inaccessible than others. Below is a list of the worst offenders that can cause barriers to comprehension, when they are not marked up for assistive technology to present them adequately or when they lack critical contextual information. Click on an item in the list for more information on how to make it more accessible.

1. Images (as demonstrated in the example above)
2. Tables
3. Videos and audio files
4. Links
5. Lists of items
6. Background and text colors
7. Page structure that isn't clearly defined, such as important information which is conveyed only with reference to a location on a page (e.g. "Click the link at the top left corner of the page" as opposed to "Click the Reset link")
8. Line breaks (Shift + Enter/Return) instead of paragraph breaks (Enter/Return)

Footer
What are some guidelines for making content accessible?

Sakai uses a single consistent Rich-Text Editor across all areas where text can be added that is more than a few lines. This editor is based on the most recent stable version of the CKEditor.

When creating content using the Rich-Text Editor, it is important that the author follow the simple guidelines below to ensure that the content can be read and understood by all. Creating well-structured and accessible content is a best practice which ensures that content is compatible with assistive devices, such as screen readers, and robust enough to be copied and pasted to other contexts or presented in unanticipated contexts. Making content accessible is also a legal requirement.

The technical measure of accessibility for a web-based resource is the WCAG 2.0 standard from the W3C. The requirements of the WCAG 2.0 are summarized in the four-letter acronym POUR:

- Perceivable - Information must be presentable to users in ways they can perceive.
- Operable - User interface components, navigation and structure must be operable.
- Understandable - Information and the operation of user interface must be understandable, and structural elements should be used in a meaningful way.
- Robust - Content must be robust enough so that it can be interpreted reliably by a wide variety of technologies, including assistive technologies.

These relatively simple considerations make a big difference if applied when content is created. The W3C provides more information in their Introduction to Understanding WCAG 2.0.

See the articles linked below.

The articles below provide instructions to make specific kinds of content more accessible.

- How can I make images more accessible?
- How can I make tables more accessible?
- How can I make videos and audio files more accessible?
- How can I make links accessible?
- How can I make lists of items accessible?
- How can choices in background and text color affect accessibility?
- How can I structure my page to make it more accessible?
• Why should I use paragraph breaks in my document?
How can I make images more accessible?

Users with some disabilities will be unable to see images and/or comprehend what they are meant to convey. **Alternative Text** can help give context and meaning to an image.

**When to Add Alternative Text Descriptions for Images**

- **Simple image with "simple meaning"** - add descriptive alternative text of 10 to 169 character as outlined below. The alternative text should describe the educational/informational purpose of the image.
- **Complex image with "rich meaning"** - add a paragraph above or below the image that goes into more detail. Some pointers, such as "Next image," or "Previous image," will help tie them together. If the image is referenced from elsewhere in the document, add a paragraph below it that can serve as a caption, and then refer to it. If the longer alternative text is not feasible, create a link to an external Web page that contains an appropriate description.
- **Decorative image** - if the image is purely decorative or used for visual formatting, the alternative text description should be left blank to hide it from users of assistive technology.

**Examples of Text Alternatives for Images**

- **Alternative Text:** “Scientist in a lab filling a vial with fluid”
- **Description in the text before or after the image:** “Next/Previous image shows a female forensic scientist, who is filling a vial containing a small amount of blood with fluid to denature the sample as part of the process of the PCR analysis method of DNA profiling. In the background is a centrifuge which will aid in the process of extracting the DNA from the sample of blood.”
- **Reference farther away in the body of the document:**
  
  "... Figure 1.3 shows the correlation between the...."
  
  [Image] Figure 1.3
Steps to Add Alternative Text to a Newly Embedded Image

1. If you do not already have an image embedded in the text box, click on the Image icon in the Rich-Text Editor's toolbar to insert an image. The Image icon displays a picture that looks like a landscape, with mountains and a sun. For more information on adding an image, please see the article How do I embed an image in a text box?

2. In the Image Properties dialog window, enter short, meaningful descriptive text in the Alternative Text box.

3. Click OK to confirm the addition of the text.
Steps to Add Alternative Text to an Existing Image

1. Click on the image you have embedded in the text box to select it.
2. Click on the **Image** icon in the Rich-Text Editor's toolbar. The **Image** icon displays a picture that looks like a landscape, with mountains and a sun.
3. In the **Image Properties** dialog window, enter short, meaningful descriptive text in the **Alternative Text** box.
4. Click **OK** to confirm the addition of the text.
How can I make tables more accessible?

Users of screen readers cannot read tables the same way sighted users do. Sighted users can tell at a glance what column and row a given cell is associated with, but a screen reader user needs a properly coded table. To make tables usable, additional steps will need to be taken to make them accessible.

Examples of Tables: Simple table

<table>
<thead>
<tr>
<th>John</th>
<th>Tomiko</th>
</tr>
</thead>
<tbody>
<tr>
<td>Game of Thrones</td>
<td>Crime and Punishment</td>
</tr>
<tr>
<td>Ender's Game</td>
<td>Brothers Karamazov</td>
</tr>
<tr>
<td>Farewell to Arms</td>
<td>Sound and Fury</td>
</tr>
</tbody>
</table>

The image above displays a simple table: books read by 2 people. Only column headers are needed to identify who read which books.

Examples of Tables: Complex table

<table>
<thead>
<tr>
<th>John</th>
<th>Tomiko</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>Game of Thrones</td>
</tr>
<tr>
<td>Week 2</td>
<td>Ender's Game</td>
</tr>
<tr>
<td>Week 3</td>
<td>Farewell to Arms</td>
</tr>
</tbody>
</table>

In the image above, there is a complex table: books read by 2 people each week. Both column and row headers are needed.

In the second example, a screen reader user will know that *The Sound and the Fury* was the book read by Tomiko on Week 3.
Steps to Making Accessible Tables

When adding tables, add a row and/or column to be used as a heading for each as appropriate. The table creation menu contains **Headers** options that allow for selecting the first row, column or both.

Add a **Summary** of the table that will inform readers of the table's content. Good examples are: "Data from recent study," "Table of inputs and outputs," etc.

Tables should only be used for tabular data, not for layout.
How can I make videos and audio files more accessible?

When you include video or audio content in your document, you must provide an alternative method for your audience to understand the content if they cannot hear the audio or see the images in the video. You can improve video and audio accessibility by providing transcripts and captions, and descriptions of video images.

Please contact your institution's office for Disability Student Services and/or Information Technology Services for students to get help with accessibility issues and instructors to get help with adapting their course content for accessibility.

Provide a transcript.

Transcripts are required to provide basic accessibility. A transcript is a textual version of video or audio content that can be read either visually or by a screen reader, searched by a web browser or other software, and scanned by a reader for important information.

A transcript should contain the words spoken in a video or audio clip, and additional descriptions, explanations, or comments that may be beneficial. For example, a transcript of a video that shows children playing ball in a school gymnasium might describe the room and indicate when the teacher blows a whistle to get the students' attention.

If you do not have a transcript of your video or audio content readily available, you can create a transcript yourself. Note that if you did not create the video or audio yourself, you may
encounter copyright issues in creating your own transcript. Please refer to your institution's Copyright Policy for more information. For some video and audio content, you may be able to find an existing transcript by searching in your institution's library catalog or online.

Note: Minutes are not sufficient for a transcript of an audio or video of a meeting (unless done by a court reporter or someone who can capture every word).

**Use video with captions.**

Captions are like the text of a transcript synchronized with audiovisual content so that someone can get the audio information in text at the same time as the corresponding image displays in the video. Captions for audio files can also help non-native speakers to follow along and understand better.

If you are presenting a video in class, it's best to find videos that are already captioned. Your institution's library may have video and media resources available, and may be able to assist you with finding appropriate captioned videos.

Your institution's office for Disability Student Services may also provide captioning assistance for those with an immediate need.

**Include an audio description for video.**

Audio descriptions are required for important visual elements of a video that aren't already described in spoken text. For example, if a graph or chart is displayed in a lecture video, and the instructor does not describe it when speaking, an audio description would be needed to supplement the video.
How can I make links accessible?

Assistive technology users use link lists to navigate content. This means they cannot rely on context to tell what a link does. Each link needs to be uniquely descriptive of what it does. The best place to uniquely identify a link is in the link text. Good examples are: "View Assignment 34," "Visit Entomological Society of America," etc.

Use Unique and Descriptive Link Text

Above is an image displaying two tables.

1. In lists where each item has several links associated with it, the temptation would be to create a table like the first example shown above. It contains three rows, each containing an Item where you can click a link to Vote for the item or Delete it. Because each item only has Vote and Delete for the links, someone using assistive technology, such as a screen reader, might not be able to tell for which item they're voting.

2. The second example shown would be better, if a bit verbose. Each item's links contain all the information you need to know to select them: Vote on Item 1, Delete Item 1, Vote on Item 2, Delete Item 2, etc.
Add Alternative Text for Image Links

For every HTML web link embedded into the rich text editor that contains only an image and no textual content, concise and descriptive alternative text is mandatory. The alternative text should describe the purpose of the link (e.g., The "destination" that the user will be taken to upon activation of the link.) For more information on adding alternative text to an image, see How can I make images more accessible?

Identify File Types in Links to Downloadable Files

Assistive technology users will benefit from knowing what type of file it is they are downloading. When you link to a file in the Rich-Text Editor, include the information in the link text.

Example: essay (MS Word), report (PDF), presentation (MS Powerpoint).
How can I make lists of items accessible?

If you think of a vertical series of items as a list, you should include it in your page as a numbered or bulleted list. Screen readers can identify lists; for example, a bulleted list containing two items may begin: "List of two items. Bullet 1."

Create a numbered list.

To create a numbered list in a document, click the Insert/Remove Numbered List button. This button has a picture of the numbers 1 and 2, each followed by lines that represent text. If you have already entered text in the editor from which you want to create a list, select the text, then click the button.

Create a bulleted list.

To create a bulleted list in a document, click the Insert/Remove Bulleted List button. This button has a picture of two bullets, each followed by lines that represent text. If you have already entered text in the editor from which you want to create a list, select the text, then click the button.
How can choices in background and text color affect accessibility?

Many users will have visual impediments that will require good contrast in the documents you are producing. The best way to help these users is to make sure that the contrast between background and foreground has a ratio of 4.5:1 or higher. Leaving the defaults of the editor intact is best - black text on white, with a ratio of 21:1.

Examples of Contrast

<table>
<thead>
<tr>
<th>Sample</th>
<th>Contrast ratio</th>
<th>Passes?</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is example text. <em>Some of it bolded. Some of it italicized.</em></td>
<td>19.56:1</td>
<td>Yes</td>
</tr>
<tr>
<td>This is example text. <em>Some of it bolded. Some of it italicized.</em></td>
<td>7.7:1</td>
<td>Sort of</td>
</tr>
<tr>
<td>This is example text. <em>Some of it bolded. Some of it italicized.</em></td>
<td>5.48:1</td>
<td>No</td>
</tr>
<tr>
<td>This is example text. <em>Some of it bolded. Some of it italicized.</em></td>
<td>16.63:1</td>
<td>Yes</td>
</tr>
<tr>
<td>This is example text. <em>Some of it bolded. Some of it italicized.</em></td>
<td>20.62:1</td>
<td>Yes</td>
</tr>
</tbody>
</table>

The image above contains examples of text with varying contrast ratios, and indicates whether the level of contrast would be adequate.
Steps to Change Foreground and Background Colors

1. If you need to edit the text color, click on the **Text Color** button, which resembles a letter A with an underline: \texttt{A}.

2. To edit the background color of the text, which displays as if you had highlighted the text with a highlighter, click on the **Background Color** button to the right of the **Text Color** button. The **Background Color** button resembles a solid black box containing a white letter A.

3. Clicking on either of these buttons will display a **Color Picker**, from which you can select a color, such as **Black** or **Maroon**. **Yellow** is a **Background Color** commonly used to highlight text. Click on a color to select it.
Check your color selection for adequate contrast.

In most cases the contrast will be obvious, but if you need to verify, take the following steps:

1. Click on the More Colors... option in the Color Picker.
2. A Select color window will pop up. At the top right of the window, your selected color will be displayed under Highlight.
3. Under this box with your selected color, you'll see a 6-digit hex number, starting with #. This is the number that allows the internet browser to display the selected color.
4. Record the the 6-digit hex number for the color you have selected. Using an online tool such as WebAIM's Color Contrast Checker, check how the Text Color you've selected contrasts with the background color behind your text (if you're selecting a Text Color) or how your selected Background Color contrasts with the color of your text. To use WebAIM's Color Contrast Checker, enter the hex number for your text and background colors into the boxes provided. The contrast checker will tell you the colors Pass if they have enough contrast.
How can I structure my document to make it more accessible?

Organizing your page with helpful titles and headings creates an outline that helps your audience access the most important information more quickly and easily.

Assistive technology users rely heavily on page titles and headings to navigate complex content. Structuring complex content will help all users parse it as well. Headings allow users to jump from one part of a document to another, without using a mouse. Screen readers will interpret headings for those who use them.

Note that for this reason, you should not use headings for typographical effects. If you need to increase or decrease the font size of large blocks of text, please use the Normal Paragraph Format and select a new Font size from the Size menu, or use Styles.

Use Unique and Descriptive Page Titles

Assistive technology users rely on page titles. You will run across the need to specify this when you are creating a page in the Lessons tool or an HTML page in the Resources tool. The title of the new document will be the same as the name of the item as it shows on the left-hand tool menu or the list in Resources.

Do Not Use Color or Spatial Position to Convey Information

Using color or spatial position to convey important information can be problematic. For example, if you were to say, "click the green button on the left," color blind users may not be able to distinguish the button. Screen reader users may have difficulty interpreting "left" because a screen reader reads from the top of the page to the bottom, as well as left to right - the best solution is to quote the target label, for example: "Click on Start Assignment," or, "Click the Save button."

Add Structure with Headings.

If a document can be outlined or you have an outline in mind when writing it, then adding headings will convey its structure. Use short title-like headings that describe content which follows.

Nest headings appropriately:

- Heading 1 > Heading 2
• If you have a section containing three sub-sections, it might look like this: Heading 2 > Heading 3, Heading 3, Heading 3
• In most cases, you should start with a Heading 1.

Steps to add Headings

1. Headings are available from the Paragraph Format menu. By default, this menu will say Normal.
2. When you position your cursor in the text box, the name of this menu will change to match the Paragraph Format of your text. In a blank document, it will say Normal.
3. Click on the Format menu (Normal, in a blank document) to select a Heading.

Notes:

• The default size of the Headings can always be adjusted with the Size menu. The default size of some of the higher-level headings (the ones with small font sizes, e.g. Heading 5-Heading 6) may need adjustment.
• Conversely, do not use headings for typographical effects; users of assistive technologies can navigate through a document by jumping from heading to heading. If you need to increase or decrease the font size of large blocks of text, please use the Normal Paragraph Format and select a new font size from the Size menu.
Use inline Styles.

Using the right style to format a bit of text is very helpful as it "codes" it appropriately. The following types of formatting are all available in the Styles menu:

- **Italic Title** - Makes selected text an *italicized Heading 2*.
- **Subtitle** - Makes selected text an *italicized Heading 3*, colored **pale gray**.
- **Special Container** - Inserts a block of text (a `<div>` HTML element) which can be used to group together several items in a document and/or format them with background color or borders. As with *paragraph breaks*, using `<div>` *containers* to group items in meaningful ways can assist with navigation because keyboard users can skip from one group of elements to another.
- **Small** - Without setting a specific font size, this style makes selected text slightly smaller than the text that surrounds it.
- **Computer Code** - Indicates a block of text that has been identified as computer code; for example, a list of HTML tags to indicate how to code in HTML.
- **Keyboard Phrase** - Defines keyboard input.
- **Sample Text**
- **Variable**
- **Deleted Text** - This puts a strikethrough through selected text (a line through the middle of the text to cross it out).
- **Inserted Text** - This underlines text.
- **Cited Work** - Visually, text is *italicized*.
- **"Inline Quotation"**
  - **Language: RTL** - Indicates that the language reads from right to left. Some examples of RTL languages include Hebrew and Arabic.
  - **Language: LTR** - Indicates that the language reads from left to right. English is an example of an LTR language.

If you are curious to see what these do, add one and switch to Source view - Inline quotation will use `<q>`, which will signify the opening of an inline quotation, very helpful. **Cited Work** will
create an element that presents itself as such. Conversely, avoid using these special formats to achieve a typographical effect. For example, Cited Work produces italic text, but it would be confusing to a screen reader if you used it just for that reason.
Why should I use paragraph breaks in my document?

A paragraph break (hit Enter or Return on the keyboard) is always more meaningful than a line break (hit Shift + Enter or Return on the keyboard). A paragraph break inserts what looks like a double-space in between one line of text and another, and allows screen reader users to parse the information on the page more readily.

Although programs like Microsoft Word have options to create single-spaced documents with paragraph breaks, web pages do not. You may find using a line break more esthetically pleasing than a paragraph break, but line breaks can create problems for screen reader users.

While a screen reader can interpret a paragraph break as "blank," a line break may not be indicated to the user. The text on the new line may sound like a new sentence, instead of the start of a new paragraph.

Images with examples of paragraph and line breaks.
1. The first image above depicts a poem, *Mary Had a Little Lamb*, where line breaks were used to separate each line.
2. In the second image, paragraph breaks separate the lines.

While the line breaks may "look better" for a visual reader, a screen reader user will hear the poem that is split up with line breaks as one contiguous sentence: "Mary had a little lamb, his fleece was white as snow, etc."
How do I check my content for accessibility?

Note: The Accessibility Checker is a third party add-on for the rich text editor. While it is open source software, the licensing guidelines do not allow it to come packaged with Sakai. If your institution has installed this add-on, the features described below will be available. If you do not see the Accessibility Checker icon, that means that your institution has not installed this add-on.

You can use the Accessibility Checker to inspect the accessibility level of content created in the Rich-Text Editor and immediately solve any issues that are found.

The Accessibility Checker presents issues with each item in the editor one at a time. For many issues, the Accessibility Checker gives you a Quick fix option. If a Quick fix is not available, the checker will describe what needs to be done to fix the issue.

Select the Accessibility Checker button.

The Accessibility Checker button looks like a human inside a dark-gray circle.

Use Quick fix options to correct issues.

The accessibility checker has multiple Quick fix options to correct accessibility issues. Below are a few of the most commonly used ones.
Quick fix option for images

1. If you have an image that lacks Alternative Text, enter a short, meaningful description for the image in the text box provided.
2. Click the Quick fix button.

Notes:

• If the image requires a longer description, include that description in the body of the document. If the text you would normally use as alternative text would be redundant to your description, leave the Alternative text box blank instead.
• If the image is purely decorative or used for visual formatting (e.g., a decorative horizontal bar that has no meaning, but separates text on the page), the alternative text description should be left blank to hide it from users of assistive technology.
• For more information about creating meaningful text alternatives for images, see How can I make images more accessible?
Quick fix option for paragraph formatting

Structuring your document with paragraph headings helps users of assistive technology navigate the page and "skim" content to get to what they need.

1. Select a **Header level** from the drop-down menu (the accessibility checker will automatically suggest a header level for you).
2. Click **Quick fix**.
Quick fix option for tables

Users of screen readers cannot read tables the same way sighted users do. Sighted users can tell at a glance what column and row a given cell is associated with, but a screen reader user needs a table to include appropriate headers and captions so that they can match up content in columns and rows.

1. From the Position drop-down menu, select where the headers belong in the table. Choosing Horizontally makes the text in the first row into headers, i.e., the text in each column of the first row becomes the title of that column. Choosing Vertically makes the text in the first column into headers, i.e., the text in each row of the first column will be the title of that row. Choosing Both puts headers in both the first row and the first column.

2. Click Quick fix.
Manually fix issues.

Sometimes the accessibility checker cannot provide a Quick fix because the suggested fix requires editing your text. For example, if you have a list of items that has been created by typing "1), 2), 3)" rather than using the Numbered List button, the accessibility checker will warn you that you need to select the text and make it into a real numbered list, so that users of assistive technology can navigate it more easily.

1. If you need to make manual changes, select the X icon (Close) in the top-right corner of the accessibility checker.
2. Edit your document's content accordingly.
3. Select the Accessibility Checker button again to continue checking.
Rich-Text Editor
What is the Rich Text Editor?

In most areas of the system where text can be entered, you can control the appearance of your text using the rich-text editor, sometimes called a WYSIWYG (What You See Is What You Get) editor. The rich-text toolbar has icons for editing and formatting your text. You may use the rich text editor to include images, links, audio and video as well as text.

*Note: Pasting text into the rich-text editor should preserve most formatting, but some types of formatting, such as colored text, may need to be added manually in the editor after pasting.*

The rich-text editor is based on an open-source application called CKEditor. For more information on the CKEditor, you may also refer to the [CKEditor 4 Documentation Site](#).

Rich Text Editor Toolbar

The Rich Text Editor toolbar contains an array of icons. See [What actions can I perform using the Rich Text Editor icons?](#) for more information on individual icon functionality.

*Note: Some configurations may not have all of the above tools and some may have additional tools.*
What actions can I perform using the Rich Text Editor icons?

Note: Depending on your implementation, you may have more icons or fewer icons available to you in the Rich Text Editor. There are several third party tools which integrate with the editor and display as additional icons in the editing toolbar (e.g. equation editors, video management applications, etc.). Also, some institutions hide seldom-used icons to make the appearance of the editing toolbar more compact.

Standard Rich Text Editor icons allow the following features:

**Source**

View or edit the document source code (for advanced users).

**Templates**

Select a layout template.

**Cut**

Cut the highlighted text to the clipboard.
Copy

Copy the highlighted text to the clipboard.

Paste

Paste the data copied to the clipboard.

Paste as Plain Text

Paste the data copied to the clipboard (without formatting).

Paste from Word

Paste content copied from Microsoft Word or similar applications.

Print

Print

Print the current document.

Preview

Preview

Footer
Preview the current document.

**Undo**

Undo the most recent action taken.

**Redo**

Redo the most recent action taken.

**Find**

Find a word or phrase within the document.

**Replace**

Find and replace a word or phrase within the document.

**Select All**

Select the entire text in the document.
Remove Format

Remove the formatting from the highlighted text.

Insert/Remove Numbered List

Create Numbered Lists.

Insert/Remove Bulleted List

Create Bulleted Lists.

Decrease Indent

Decrease the paragraph indent.

Increase Indent

Increase the paragraph indent.
Block

“

Format a block of text to identify quotations.

Create DIV Container

<div>

Creates a container to apply formatting beyond one block of text.

Bold

B

Applies Bold formatting to highlighted text.

Italic

I

Applies Italic formatting to highlighted text.

Underline

U

Applies Underline formatting to highlighted text.

Strike Through

S

Footer
Applies Strike Through formatting to highlighted text.

**Subscript**

$x_a$

Subscript the highlighted text.

**Superscript**

$x^a$

Superscript the highlighted text.

**Align Left**

Set text alignment left.

**Align Center**

Set text alignment center.

**Align Right**

Set text alignment right.
Justify

Justify text alignment.

Text Direction Left to Right

Displays text left to right.

Text Direction Right to Left

Displays text right to left.

Link

Create hyperlink.

Unlink

Remove hyperlink.

Anchor

Footer
Inserts or modifies a link anchor.

**Insert Content Item**

Inserts an external tool (i.e. LTI tool) as a content item.

**Record Audio Clip**

Create and display a voice recording.

**Image**

Inserts images into the document.

**Insert/Edit Movie**

Inserts a movie/audio player.

**Table**

Creates a table with the defined number of columns and rows.
Insert Horizontal Line

Inserts a divider line (horizontal rule).

Smiley

Inserts an emoticons image (smiley faces, email icon, light bulb, etc.).

Insert Special Character

Inserts symbols & special characters (accented characters, trademark, currency symbol, etc.).

Styles

Applies special styles to a block of text.

Format

Applies paragraph formatting to a block of text.

Font
Applies a specific font to a block of text.

**Size**

Applies a specific size to a block of text.

**Text Color**

Changes the color of the text.

**Background Color**

Changes the background color of the text.

**Maximize**

Maximizes the editor size inside the browser.

**Show Blocks**

Shows where there are block elements boundaries in the text.
What are some keyboard shortcuts for the Rich-Text Editor?

You can operate the Rich-Text Editor using a computer keyboard with the shortcuts and hotkeys below. For a full list of keyboard commands in the Rich-Text Editor, you may also refer to the CKEditor list of shortcut keys.

Keyboard navigation to the editing area

From your course/project site, **tab** or **arrow down** into the editor's text box to place focus in the text box and edit content. When you are done, you can tab or arrow down out of the editor.
Accessibility Help for the Rich-Text Editor

Alt + 0 opens the Accessibility Instructions dialog for the Rich-Text Editor.

Hotkeys inside the editing text box

Formatting shortcut keys

When focus is in the editor, you can use formatting shortcut keys similar to those used in most word processors, such as Microsoft Word. Some examples include:

- **Bold** - Ctrl + B (in Windows) or Command + B (on a Mac)
- **Italics** - Ctrl + I (in Windows) or Command + I (on a Mac)
- **Underline** - Ctrl + U (in Windows) or Command + U (on a Mac)

In the example pictured above, bold text was added.
Navigate away from the editing text box to the list of formatting elements

Type **Alt + F11** to navigate to the list of formatting elements and styles that have been used in the text where your cursor was positioned.

Navigate away from the editing text box to the Editor toolbar

Type **Alt + F10** to select the first button in the editor toolbar (i.e. **Source**) and begin using the toolbar.
Navigate within the Editor toolbar

When focus is in the Editor toolbar, you can navigate it as follows:

- **Tab** and **Shift + Tab** – move focus forward and backward among the toolbar button groups.
- **Left Arrow** and **Right Arrow** – move focus forward and backward among the toolbar buttons within a group, respectively.
- **Enter** and **Space** – activates a selected toolbar feature.
- **Escape** – puts the focus back to the editing area without executing any commands.

Note: See the step **Navigate away from the editing text box to the editor toolbar** for instructions to access the toolbar from the editing window.
How do I create a link to a web site in a text box?

Note: To link to an HTML page you have stored in Resources, see How do I create a link to a Resources item in a text box?

Select the text.

In the text box, select the text you would like to serve as a link to a web site. For accessibility, you should use meaningful text to describe your link.

Note: If you do not select text, the text of the link will display in full, linked to the site (e.g. http://www.oed.com).

Click the Link icon.

The Link icon looks like a chain link.
Or use Ctrl/Command-L on the keyboard to open the Link dialog box.

Alternatively, you can open the Link dialog box with the keyboard command Ctrl + L (in Windows) or Command + L (on a Mac).

Enter the URL.

The Link window will pop up for you to enter the link (URL).

1. Enter or paste (CTRL-V on PC or COMMAND-V on Mac) the URL for the web page to which you are linking in the box marked URL.
2. Click OK to confirm the addition of the link.
Note: To link to an HTML page you have stored in Resources, see How do I create a link to a Resources item in a text box?

View link in editor.

Please refer to the Oxford English Dictionary when you include definitions in your essay.

The linked text will be underlined.
How do I create a link to a Resources item in a text box?

Go to the Rich-Text Editor and select your text.

In the text box, **select** the text you would like to serve as a link to the folder or file. For accessibility, you should use **meaningful text** to describe the folder or file you are linking.
Click the Link icon.

The Link icon looks like a chain link.

Or use Ctrl/Command-L on the keyboard to open the Link dialog box.

Alternatively, you can open the Link dialog box with the keyboard command Ctrl + L (in Windows) or Command + L (on a Mac).

Footer
Insert the link.

A window will pop up to allow you to enter a URL or select an item using the Server Browser.

Note: If you copy a link in Resources and paste it into the Rich-Text Editor in another tool (e.g. Lessons) rather than using the Server Browser to select the item in the editor, the link will not change when you import content from the site.
1. Click the Browse Server link.

2. Double-click Resources.
The Server Browser will open. It displays items on your site to which you can link.

Double-clicking Resources will expand the list of the site's Resources.

3. Navigate to the item to which you would like to link and click on the checkbox next to the file name.

1. Select the item to which you would like to link by clicking the checkbox next to the file name.
2. Click OK.

Note: There may be additional folders in Resources in which the item is located. Double-click each folder to display its contents.
Click OK to create the link.

The Link dialog box will display the link to the item in the URL box.
1. Click OK to create the link.
2. The text linked to the Resources item will be underlined.

**Alternately, you may go to Resources to locate the item URL.**

Select the Resources tool from the Tool Menu in your site.
Click Actions, then Edit Details for the item.

Locate the item you want to link to in Resources and from the **Actions** drop-down menu, select **Edit Details**.

This displays the Edit Details page.

**Copy the item URL.**

Copy the item URL to your computer's clipboard (CTR-C for PC or COMMAND-C for MAC).
Paste the item URL.

<table>
<thead>
<tr>
<th>Link Info</th>
<th>Target</th>
<th>Advanced</th>
</tr>
</thead>
</table>

**Display Text**

Class01 Lecture Notes

**Link Type**

URL

**Protocol**

<other>

**URL**

/group/253b15ab-6bfa-493b-a994-54dbcf3c14b9/class01.pdf

Paste (CTRL-V for PC or COMMAND-V for MAC) the URL for the Resources item in the box marked URL.
Click OK.

When the item that contains the text box is posted, the selected text will display as an underlined link to the Resources item.

View link.

Read Class01 Lecture Notes.

Words: 4, Characters (with HTML): 105/1000000
How do I create a link to an activity in a text box?

Tip: If you are creating a text box in the Lessons tool, you may also insert activities directly as individual items on the page, rather than within the Rich-Text Editor. See How do I add activities to Lessons? for more information.

Select the text to be linked.

In the text box, select the text you would like to serve as a link to the activity. For accessibility, you should use meaningful text to link to the activity.

Click the Link icon.

The Link icon looks like a chain link.

Or use Ctrl/Command-L on the keyboard to open the Link Footer.
dialog box.

Alternatively, you can open the Link dialog box with the keyboard command **Ctrl + L** (in Windows) or **Command + L** (on a Mac).

**Click Browse Server.**

The *Link* dialog box will pop up. Click **Browse Server**.
Double-click the name of the tool with the activity to which you want to link.

The Server Browser will display in a pop-up window. If you have any items posted in tools such as Forums, Assignments or Tests & Quizzes, they will be displayed in the Server Browser.

Double-click the name of a tool to expand the list of items available in that tool, for example, Forums.
Click the checkbox next to the activity to which you want to link.

1. Click the checkbox next to the activity to which you want to link.
2. Click OK
Click OK to create the link.

The *Link* dialog box will display the URL of the activity in the **URL** box.

1. Click **OK** to create the link.
2. The text linked to the activity will be underlined.
How do I embed an image in a text box?

Position the cursor.

Robert Lee Frost (March 26, 1874 – January 29, 1963) was an American poet. His work was initially published in England before it was published in America. Known for his realistic depictions of rural life and his command of American colloquial speech, Frost frequently wrote about settings from rural life in New England in the early twentieth century, using them to examine complex social and philosophical themes.

Frost was honored frequently during his lifetime, receiving four Pulitzer Prizes for Poetry. He became one of America's rare "public literary figures, almost an artistic institution." He was awarded the Congressional Gold Medal in 1960 for his poetic works. On July 22, 1961, Frost was named poet laureate of Vermont.

Position your cursor in the text box at the point you want to embed the image.
Click on the Insert/Edit Image icon.

This displays the image properties dialog box

Click Browse Server.
Upload the image file.

Select the folder where you want to store the image file (i.e. Resources) then click on the Upload File icon.

Drop files or paste URLs or clipboard images.
Or, click Select files.

This displays an upload file dialog box.

**Locate and select the image file on your computer, then click Open**
Click OK.

This returns the display to the file browser window. The uploaded file will be selected. Click OK to continue.
Modify image properties. (Optional)

Adjust the image width and height if needed and add an alternative text for screen readers.

Set the Alignment.

Set the Alignment (left or right) for the image if you want to surround the image with text.
Click OK.

This returns the display to the text box with the embedded image.

Example of additional text displayed next to a left-aligned image.
How do I embed a linked web image in a text box?

Locate and copy the image link.

Locate the image on the web that you want to embed.

Right-Click the Image (PC) or CTRL-Click (MAC) the image and copy the image URL to your computer's clipboard (CTRL-C for PC or COMMAND-C for MAC).
Position the cursor.

John Steinbeck's Dust Bowl America

Position your cursor in the text box at the point you want to embed the web linked image.

Click Insert/Edit Image icon.

This displays the Image Properties dialog box.
Paste the URL.

Paste the copied URL into the box marked **URL**. (Use CTRL-V for PC or COMMAND-V for MAC to paste.)

**Modify image properties. (Optional)**
Adjust the image width and height if needed and add an alternative text for screen readers.

**Set alignment. (Optional)**

Set the Alignment (left, right, or center) for the image.

**Click OK**
Example of centered image below text.
How do I embed a YouTube video in a text box?

Locate the Youtube video you would like to embed in a text box.

Click Share.

This displays the YouTube sharing panel.
Click Embed.

This displays the YouTube video embed code.

Copy the embed code.

Copy the YouTube embed code to your computer's clipboard (CTRL-C for PC or COMMAND-C for MAC).

Tip: Remove the check mark next to "Show suggested videos when the video finishes"
In the text box, click Source.

View the following video about how future generations might live on Mars.

This displays the HTML code for the text box.
Position the cursor.

View the following video about how future generations might live on Mars.

Position your cursor where you would like the video embedded, then paste the YouTube embed code (CTRL-V for PC or COMMAND-V for MAC).
Click Source again.

This returns the text box display to normal editing mode. The embedded YouTube video will display as a box marked "iframe". When the item using the text box is posted or saved, it displays the embedded YouTube video.
How do I add special characters to a text box?

Position the cursor.

Position your cursor where you want to insert the special character or diacritical mark.
Click the Insert Special Characters icon.

This displays the Select Special Character box.
Select the special character or diacritical mark you want to insert.

View special character.

The special character / diacritical mark will now be displayed in the text box.
How do I add/edit a table in a text box?

Position the cursor.

Position your cursor in the text box where you want the table to display.

Click Table icon.

This displays the Table Properties dialogue box.
Set the number of Rows, Columns and any other table properties needed.
Click OK.

View the table.

Below is a table of 19th Century poets noting their name, dates, and country.
Edit the table properties. (Optional)

To edit the table properties, right-click (CTRL-click for MAC) on the table. This displays the Edit Table dialog box.
Select the Table Element that you want to edit (Cell, Row, Column, Table Properties or Delete).
How do I add a content template to a text box?

Click the Template icon.

This displays the Content Template dialog box.
Select the content template.

This displays the selected content template in the text box.

Add content to the content template.

Type the title here

Type the text here
Mars

Mars is the fourth planet from the Sun and the second-smallest planet in the Solar System after Mercury. In English, Mars carries a name of the Roman god of war, and is often referred to as the "Red Planet" because the reddish iron oxide prevalent on its surface gives it a reddish appearance that is distinctive among the astronomical bodies visible to the naked eye. Mars is a terrestrial planet with a thin atmosphere, having surface features...
1. Right-Click (CTRL-Click for MAC) the image and select Image properties.
2. Enter the URL of the image in the box marked URL.
3. Click OK

Example page.

Mars

Mars is the fourth planet from the Sun and the second-smallest planet in the Solar System after Mercury. In English, Mars carries a name of the Roman god of war, and is often referred to as the "Red Planet" because the reddish iron oxide prevalent on its surface gives it a reddish appearance that is distinctive among the astronomical bodies visible to the naked eye. Mars is a terrestrial planet with a thin atmosphere, having surface features...
How do I paste text from a Microsoft Word document to a text box?

Note: In the most recent version of the Rich Text Editor, Word-specific tags are removed automatically when copied text is pasted into the editor.

Copy the text from Word.

Copy the text in your MS Word document to your computer's clipboard (CTRL-C for PC or COMMAND-C for MAC).
In the Rich Text Editor, click the Paste From Word icon.

Paste the text.

You must paste your text using the keyboard shortcuts (CTRL-V for PC or COMMAND-V for MAC).
Oceanography Syllabus

Course Objectives

A. Communication Skills:

Upon successful completion of this course the student should be able to:

Communicate in verbal, written and visual forms, the basic information about the geographic, geologic, chemical and biologic features of the world’s ocean, and the basic relationships and interactions between ocean, continents, and atmosphere.

B. Qualitative Reasoning Skills:

The pasted content will now appear in the Rich Text Editor and you may edit it there to display the desired formatting.
How do I embed an mp4 video in a text box?

MP4 videos can embed in a text box using the Rich Text Editor. Other file types that can be embedded in a text box are .FLA, .F4V, .3GPP, .M4V or .MOV files.

In the text box, position your cursor where you want to embed the mp4 video.
Click the Insert/Edit Movie icon.

This displays the Movie Properties dialog box.

Click Browse Server.
This displays the Entity Picker dialog box.

**Click the Upload file icon.**

![Full page screenshot of an upload file dialog box, with the Entity Picker dialog box visible, showing a folder that is empty with the message: "Folder is empty. Drop to add items." The dialog box has options for selecting files, viewing resources, and forums.]

**Drop files or paste URLs or clipboard images.**

Drop files or paste URLs or clipboard images

**Or, click Select files.**

Click the Upload file icon.

This displays an upload file dialog box.
Locate and select the mp4 video file that you want to embed in the text box.

Once you have located and selected the file, click **Open** to upload it.
The file will upload.

Your file will be uploaded to the server. This may take a while if it is a large file.
Click OK to embed the video on the page.

Once the file has finished uploading, it will appear in Resources and will be selected by default. Click OK to add the video to the Rich Text Editor.
Click OK to continue.

View embedded video file.

Instructions

View this video to learn more about the new features in Sakai 12.
The embedded video will display in the editing view as "Movie." When the text box is posted or saved, it will display the video on the page.
How do I embed an mp3 audio in a text box?

In the text box, position your cursor where you want to embed the mp3 audio file.

Click Insert/Edit Movie.

This displays the Movie Properties dialog box.
Click Browse Server.

This displays the Entity Picker dialog box.
Click the Upload file icon.

Drop files or paste URLs or clipboard images.

Or, click Select files.

This displays an upload file dialog box.
Select the mp3 audio file you want to embed in the text box.

Once you have located and selected the audio file, click Open to upload it.
Click OK.

Once the file finishes uploading, it will show in the file directory listing and will be selected by default. Click **OK** to continue.
Set the Height to 35, and then click OK.

View the embedded audio file in the editor.

Instructions
What is the tempo in the following piece of music?
The editing display will show a place-holder for the audio marked "Movie". When the text box item is published the embedded audio player will be displayed.
How do I set my preference for the Rich-Text Editor mode?

You may set your preference for the rich text editor toolbar display throughout the system if desired.

**Go to Preferences.**

From your *Home* area, select the *Preferences* tool.

**Select the Editor tab.**
Choose your default preference.

PREFERENCES
Notifications  Time Zone  Language  Sites  Editor

Editor Options

- Default Rich Text Editor toolbar layout

- Auto detected based on browser size
- Force basic/mobile mode (Limited set of buttons and features)
- Force full/desktop mode (Full set of buttons, all features)

Update Preferences  Cancel Changes

Click Update.

Update Preferences  Cancel Changes
Profile Tool
What is the Profile tool?

The Profile tool contains basic user information, including names, and other optionally displayed information.

Your Profile is available in all of your sites throughout the system. It contains information about you, such as status messages, your photo, biography, contact information, social networking information (e.g. Twitter integration), connections, notification preferences, and privacy settings. Some institutions update fields in the Profile automatically when user accounts are created. Typical institutional updates include the user photo and email address. All Profile fields are optional.

Note: Some Profile options may be locked or unavailable depending on institutional settings.

To access this tool, select Profile from the Tool Menu in My Workspace.
Or, select your username/photo in the top right corner.

When the dropdown menu appears, click on **Profile**.
How do I set up my profile?

Your Profile is available in all of your sites throughout the system. It contains information about you, such as status messages, your photo, biography, contact information, social networking information, and privacy settings. Some institutions update fields in the Profile automatically when user accounts are created. Typical institutional updates include the user photo and email address. All Profile fields are optional.

*Note: Some Profile options may be locked or unavailable depending on institutional settings.*

Go to Profile.

Select the **Profile** tool from the Tool Menu in the Home area.

Changing Your Picture

Mouse over the image area and select **Change picture** to upload a new photo.
Select a new picture and upload.

Click the **Choose File** button to browse your computer for a new image.

Select your new picture.

Once you have located the image you would like to use, select it and click **Open**.
Note: Your image must be in a web-friendly format (such as .jpg, .gif or .png) and 2 MB or less in file size.

Upload your new picture.

The filename of the picture you selected will appear listed. If this is correct, click the Upload button.
Your profile picture has been updated! This is the image that will display throughout Sakai when users view your profile. It is visible in places such as the Forums tool when you post messages and the Roster tool in your sites.
Example of profile image display in Roster.

<table>
<thead>
<tr>
<th>Picture</th>
<th>Name</th>
<th>User ID</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="example.png" alt="Profile Image" /></td>
<td>Demo, Instructor</td>
<td>демонстратор</td>
<td>instructor</td>
</tr>
<tr>
<td><img src="example.png" alt="Profile Image" /></td>
<td>Demo, Student01</td>
<td>student01</td>
<td>Student</td>
</tr>
<tr>
<td><img src="example.png" alt="Profile Image" /></td>
<td>Demo, Student02</td>
<td>student02</td>
<td>Student</td>
</tr>
<tr>
<td><img src="example.png" alt="Profile Image" /></td>
<td>Demo, Student03</td>
<td>student03</td>
<td>Student</td>
</tr>
<tr>
<td><img src="example.png" alt="Profile Image" /></td>
<td>Demo, Student04</td>
<td>student04</td>
<td>Student</td>
</tr>
</tbody>
</table>

Example of profile image in Forums.

**Intro**

Student01 Demo (student01) (Dec 13, 2017 4:25 PM) - Read by: 1

Hello class! I'm Student One and this is my first time using Sakai.
Editing your information.

Student01 Demo

Say something

Say it

Profile

Basic Information

You haven't filled out any information yet

Edit

Mouse over the right side of information each section near the horizontal rule to display the editing option.

Click on the Edit link to modify or add your information.

Basic Information.

Save changes  Cancel
Enter a brief personal statement under **Basic Information** so that other system users can get to know a little bit about you, and then click **Save changes**.

The [Rich Text Editor](#) is available to you here, in case you would like to format your text.

*Note: Remember that all fields are optional. You may also choose to show/hide some information in your Privacy settings.*

**Contact Information.**

<table>
<thead>
<tr>
<th>Contact Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Email</strong></td>
<td><a href="mailto:student01@awesomeu.edu">student01@awesomeu.edu</a></td>
</tr>
<tr>
<td><strong>Home page</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Work phone</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Home phone</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Mobile phone</strong></td>
<td>555-555-5555</td>
</tr>
<tr>
<td><strong>Faximile</strong></td>
<td></td>
</tr>
</tbody>
</table>

Often, the user’s college email address is automatically populated in this area. If it is not, or if you prefer an alternate email address, you may enter it here.

You may also choose to enter your phone and/or fax numbers if desired.

Be sure to click **Save changes** to save any changes.
If you are a staff member at your institution, the Staff Information section is a place to display more information about you and your role at the institution. For example, faculty members might choose to include a professional biography here, as well as information about research interests, publications, or the classes that they teach. Click **Save changes** to save any changes.

### Staff Information

<table>
<thead>
<tr>
<th>Position</th>
<th>Professor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>English</td>
</tr>
<tr>
<td>School</td>
<td>Arts and Sciences</td>
</tr>
<tr>
<td>Room</td>
<td>4th</td>
</tr>
</tbody>
</table>

**University profile URL**

**Academic/research URL**

**Publications and conferences**

Save changes  Cancel

If you are a student at the institution, you may enter information about your degree or program tracks here. Click **Save changes** to save any changes.

### Student Information

<table>
<thead>
<tr>
<th>Degree/Course</th>
<th>Bachelor's Degree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subjects</td>
<td>English major</td>
</tr>
</tbody>
</table>

Save changes  Cancel
Social Networking.

You may also include links to your social media accounts or contact information on social networking sites. Click **Save** to save any changes.

Personal Information.
You may also choose to share information about your favorite books, TV shows, movies, or quotes. Click **Save changes** to save any changes.

*Tip: Users can search for connections in Profile based on common interests.*
How do I post a status message to my profile?

You can post to your wall in the Profile tool by entering a status message, or by posting directly to your wall.

Go to Profile.

Select the Profile tool from the Tool Menu in your Home area.

Enter a status message.
Enter your message into the text box provided and then click the **Say It** button.

*Note: Status messages are limited to 140 characters. You will see a counter to the right of the text box which tells you how many characters you have remaining.*

The message will appear at the top next to your name.
How do I add pictures to my profile picture gallery?

Go to Profile.

Select the Profile tool from the Tool Menu in your Home area.

Click Pictures.
Click Browse to select your image files.

You may select more than one image if you like. The maximum number of profile gallery images is 10.

View selected files.

1. Selected files will appear listed below the **Browse** button.
2. If you decide not to upload a given image, you can click **Delete** to remove a file from the list.

**Upload chosen files.**

Once you have selected your file/s, click the **Upload chosen files** button.

*Note: The combined file size of all images to upload should not exceed 20MB.*
Once your images have been uploaded, they will display under "My Pictures".
How do I search for and add connections?

Go to Profile.

Select the Profile tool from the Tool Menu in your Home area.

Click Search.

Or, you can also go to Connections to view/search from there.

1. Click Connections.
2. Then, click Search for Connections.
Enter your search terms.

Enter a name or keyword to search for, and then click the **Search** button.

*Note: Optionally, you can choose to search by name/email, or common interest. You may also include current connections, or limit the search to a particular course by selecting it from the drop-down menu.*

**View search results.**

Displaying 1 result for: **student02**

- [Clear search](#)

<table>
<thead>
<tr>
<th>Student02 Demo</th>
<th>Add as a connection</th>
<th>View connections</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Cat" /></td>
<td><img src="icon" alt="Icon" /></td>
<td><img src="icon" alt="Icon" /></td>
</tr>
</tbody>
</table>
Search results will display at the bottom of the screen.

**Add connections.**

Click the **Add as a connection** link to send a connection request to the selected user.

**Connection request confirmation.**

You will receive a notice letting you know that the user you have contacted will have to confirm the request before being added as your connection. To proceed with the connection request, click **Add connection**.
Pending requests.

Note: Once you have sent a connection request to someone, you will see the text “Connection requested” displayed for that user until they accept or ignore the request.
How do I accept a connection request?

Go to Profile.

Select the Profile tool from the Tool Menu in your Home area.

Click Connections.

View connection requests.

Any pending connection requests that you have received will be listed here.
Select Confirm connection to accept the request.

Click **Confirm connection** to accept the connection request from the selected user.

Select Confirm connection requests again to verify your selection.
How do I send a message to a connection in Profile?

Go to Profile.

Select the **Profile** tool from the Tool Menu in your Home area.

**Click Messages.**

**Click Compose message.**
Enter your message and send.

<table>
<thead>
<tr>
<th>PROFILE</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>My profile</td>
<td>Pictures</td>
<td>Connections</td>
</tr>
</tbody>
</table>

1. Start typing the name of one of your connections to get a list of connections you can send a message to, then select them from the list.
2. Enter a subject.
3. Enter a message.
4. Click **Send Message**.
Sent message will display.

To: Student02 Demo
Subject: Hi
Message: Hello! How are you?

Message sent
How do I change my privacy settings?

On your privacy page you can control what parts of your profile other people can see. You can tailor this so that certain information is only available to you, to your connections, or to everyone.

Go to Profile.

Select the Profile tool from the Tool Menu in your Home area.

Click Privacy.
Modify your privacy settings.

You may use the drop-down menus to change the privacy settings for each of the items listed.

*Note: Depending on your institutional Profile settings, some of these privacy settings may be locked or unavailable.*
Click Save settings.
If you make any changes, be sure to click **Save settings** to save your changes.
How do I set my notification and other profile preferences?

On your preferences page you can control what emails are sent you when various actions occur, choose what widgets are shown on your profile, manage your preference to an officially provided image (if configured) as well as manage the Twitter integration for your status updates. All changes in preferences are optional.

*Note: Depending on institutional settings, some of these options may not be available in your local instance.*

Go to Profile.

Select the **Profile** tool from the Tool Menu in your Home area.

Click Preferences.
Manage email notifications.

Click the radio buttons to adjust the settings on or off for each email notification preference.

Manage Twitter integration.

If you have an existing Twitter account, you may link it to your Sakai profile if desired.

Click **Link Twitter account** and a new window will open and connect to Twitter.

*Note: The Twitter integration will post your Sakai status updates to your Twitter account. However, it does not post your other Tweets to Sakai.*
Grant access.

Log in with your Twitter username and password, and then click the **Authorize app** button to grant Profile2 access to post status updates.

You'll be presented with a PIN code.

**Enter the PIN and click Link.**

Back on the preferences page, enter the PIN code in the box and click **Link**. Your details will be verified with Twitter.

*Note: You can disable the Twitter integration by clicking Unlink.*
Manage profile image settings.

If you have an existing gravatar and you would like to use that as your profile image, you may check the box here.

Manage widget settings.

Check the box next to any of the available widgets to show them on your profile.

- **Show my kudos rating**: This will display your kudos rating on your profile once it has been calculated.
- **Show my pictures**: This will display pictures from your image gallery on your profile if selected.
- **Show my online status**: This will show whether or not you are currently online. If enabled, you can further control this in your privacy settings. If disabled, you will appear to be offline.

Click Save settings.

If you have made any changes to your preferences, be sure to click **Save settings** to save your changes.
Resources Tool
What is the Resources tool?

The Resources tool allows instructors to share a wide variety of files with their students within a site. Individual users may also have Resources within their personal My Workspace area.

Instructors or site owners can upload files (for instance, word processing documents, spreadsheets, slide presentations, audio and videos), as well as create and post HTML (web) pages, simple text documents, library citations, and share links to useful web sites.

Instructors or site owners can organize these files and links into folders and subfolders making it easier for students to locate and access items. Folders and files in Resources can be moved or reordered within a site or copied from one site to another.

Files and folders can display contextual remarks, can be shown, hidden or viewable only during specific dates and times. Instructors can automatically notify site members by email that an item has been added to Resources.

Resources also allows users to upload multiple files using the Drag and Drop interface, or using the WebDAV protocol.

To access this tool, select Resources from the Tool Menu in your site.
Example of a Resources page.

<table>
<thead>
<tr>
<th>Title</th>
<th>Created By</th>
<th>Modified</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Root Folder: Oceanogr OCN 101 Spring 2018 Resources</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 8:51 am</td>
</tr>
<tr>
<td>Folder: Syllabus and Guidelines</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 8:52 am</td>
</tr>
<tr>
<td>Folder: Oceanography</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 8:51 am</td>
</tr>
<tr>
<td>Subfolder: Readings</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 8:52 am</td>
</tr>
<tr>
<td>Folder: Unit 1</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 8:57 am</td>
</tr>
<tr>
<td>Content files: O class01.pdf</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 9:02 am</td>
</tr>
<tr>
<td>Folder: Unit 2</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 8:51 am</td>
</tr>
<tr>
<td>Folder: Oceanography Websites</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 8:54 am</td>
</tr>
<tr>
<td>Web Link: Oceanography Society</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 8:51 am</td>
</tr>
</tbody>
</table>
How do I navigate the Resources tool?

There are a number of controls and breadcrumbs that determine the display of the Resources tool, making it easier to maneuver about within the tool.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Folder View

Clicking on the name of any folder will isolate the display to just the contents of that folder.
Breadcrumb Trails

Tool-Level Breadcrumb Trail

When a folder or subfolder is isolated, a breadcrumb trail of links allows users to navigate the folders. Clicking the root folder will return the Resources display to the root level with all the folders closed.

Open / Close

Folders with content will display a solid folder icon. Clicking a solid closed folder will open a folder, within the view of all of the folders. Clicking a solid open folder will close a folder.
Expand All / Collapse All

Clicking **Expand All** will open up and display the contents of all folders and subfolders. Clicking **Collapse All** will close all folders and subfolders.

Expand All / Collapse All is a toggle button. Clicking it once will expand the display; clicking it again will collapse the display.

Search
Clicking **All Site Files** link will display a search field. Enter keywords to locate a specific file or files.
How do I create folders?

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Create Folders.

To the right of the site's root folder, from the Actions drop-down menu, select Create folders. This displays the Create Folders page.
Enter the name of the folder.

Add multiple folders. (Optional)

If you would like to create multiple folders, click **Add another folder**.

*Note: You can add as many folders as you want by clicking “Add another folder”.*
Click Create Folders Now.

To create the folder(s) in Resources, click **Create Folders Now**.
This returns the display to the Resources page with the newly created folder(s) displayed.

**View folders in Resources.**

Notice that the folders are displayed slightly indented to the root folder.

**Create subfolders. (Optional)**
To create a subfolder within a folder, from the Actions drop-down menu, select Create Folders to the right of the parent folder.

This displays the Create Folders page.

**Enter a title for the subfolder.**

Create Folders

Location: /Oceanogr CCN 101 Spring 2018 / Reading

Create as many folders as you like! If you change your mind about needing one of your folders, click the 'X' icon beside it. Press the 'Create Folders Now' button when you have finished.

Folder Name

Add Another Folder

Add details for this item

Create Folders Now Cancel

Create multiple subfolders. (Optional)

Create Folders

Location: /Oceanogr CCN 101 Spring 2018 / Reading

Create as many folders as you like! If you change your mind about needing one of your folders, click the 'X' icon beside it. Press the 'Create Folders Now' button when you have finished.

Folder Name

Add Another Folder

Add details for this item

Create Folders Now Cancel

If you would like to create multiple subfolders, click Add Another Folder.

Note: You can add as many subfolders of a folder as you want by clicking "Add Another Folder".
Click Create Folders Now.

To create the subfolder(s) in Resources, click **Create Folders Now**.

This returns the display to the Resources page with the newly subfolder(s) displayed within the main folder.

**View subfolders in Resources.**

Once a folder contains subfolders, the icon will appear as a solid folder.
View contents of subfolder.

Click the solid folder icon to view the folder contents. Notice that the subfolders are displayed slightly indented to the parent folder.
How do I upload files to Resources?

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Upload Files.

To the right of the folder to which you want to add files, click the Actions dropdown menu and select Upload Files.

If you have not created any folders yet, use the site's root folder (bearing the name of the site) to add files.
Drag and drop files from your computer.

Drag and drop files from your desktop into the box above.
Files can be uploaded individually or in ZIP archives. Expand ZIPs after uploading via the file's Action menu. Click Continue when ready to complete the upload. Note that you cannot upload more than 50 MB of material at once.

Copyright. It is your personal responsibility to verify that you have permission from the copyright holder to upload the file(s) to this website. Text, graphics and other media files may all be subject to copyright control even if your site is restricted to site members.

Drag files from your computer and drop them in box Drop files to upload, or click here to browse.
This will display thumbnails of the files that will be uploaded.

Or, browse your computer for files.

Click the Drop files to upload, or click here to browse button.
This will open your computer’s **File Upload** window where you can browse for and select the file.

**Click Continue.**

This uploads the files.

**View files in Resources.**

The files are now located inside the selected Resources folder.
How do I transfer files to Resources using WebDAV?

Users can transfer files to Resources using the WebDAV protocol. WebDAV allows users to upload multiple files and folders from their local computer to and from their site Resources.

WebDAV stands for "Web-based Distributed Authoring and Versioning". It is a set of extensions to the HTTP protocol that allows users to collaboratively edit and manage files on remote web servers.

Once users have set up WebDAV for a particular site Resources, their computer will treat the Resources like any other folder on their local system. Users are able to drag and drop files and folders from Resources just as they would in “My Computer” in Windows, or the “Finder” on a Mac.

For Windows, users can download AnyClient for WebDAV connections, or set up a connection using the native Windows WebDAV support.

Mac OS X 10.4 (Tiger) and newer supports secure WebDAV connections in the Finder. Mac users can also use Cyberduck or AnyClient.

When providing your login name and password, you must use your Duke NetID followed by @duke.edu (e.g. abc12@duke.edu).

Depending on your specific operating system version, you may find one method performs better than another.

Note: You may also upload multiple files using the drag and drop feature in Resources.

Go to Resources.

Select Resources from the Tool Menu in your site.
Click Transfer Files.

To locate directions for setting up WebDAV on your computer, click Transfer Files.

WebDAV instructions will display.

This displays links to directions for setting up WebDAV for your computer’s operating system. Locate your operating system in the list of supported systems shown, and follow the instructions provided for setting up WebDAV on your computer.
How do I upload and unpack a zip file to a Resources folder?

There are two methods for uploading a zip file to Resources: drag-and-drop and the upload file functionality. Once you have uploaded the file, you may use the Actions / Expand Zip Archive functionality to unpack the zip file into its component files.

Go to Resources.

Select the **Resources** tool from the Tool Menu of your site.

From the Actions menu, select **Upload Files**.

From the **Actions** drop-down menu to the right of the folder where you want to upload the zip file, select **Upload Files**.
Drag and drop the zip file from your computer.

Drag the zip file from your computer and drop it in the box marked **Drop files here to upload**. This will display a thumbnail of the zip file that will be uploaded.
Or, click to switch to a file browser view.

If you prefer to browse for your file instead, click the **Drop files here to upload, or click here to browse** button to go to the file browser view.

Locate and select the file on your computer, then click **Open** to upload.
Click Continue.

This uploads the zip file.

Click Actions, then Expand Zip Archive.

From the Actions drop-down menu next to the zip file, select Expand ZIP Archive.
View zip contents in Resources

The zip file is automatically unpacked within the current folder.
1. A new subfolder within the current folder is created using the name of the zip file.
2. The zip file content is unpacked within this new subfolder.
3. The original zip file remains.
How do I create a zip archive file in Resources?

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Compress to Zip Archive.

To the right of the folder you want to zip archive, from the Actions drop-down menu, select Compress to ZIP Archive.

This creates a zip file.
Zip file contents.

The zip file contains a copy of all of the subfolders and files inside the selected folder.

*Note: The zip file is named the same as the Resource folder that was compressed. By default, the zip file is placed inside of the root folder of the site.*
How do I add a web link or URL?

Users can create links to web pages in Resources.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Add Web Links (URLs).

To the right of the folder to which you would like to add the web link, from the Actions dropdown menu, select Add Web Links (URLs).

This displays the Add Web Links (URLs) page.
Enter web address.

Enter (or paste) the web site address (URL) and enter a name of the link.
You may also click **Add Another Web Link** to add additional links. (Optional)
Click Add Web Links Now.

View links in Resources.

This creates links to the web sites in the selected Resource folder.
How do I create a text document?

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Create Text Document.

To the right of the folder in which you want to create the text document, from the Actions drop-down menu, select Create Text Document.

This displays the Create Text Document page.
Enter text, then click Continue.

Create Text Document

Type in the text and click 'Continue' at the bottom.

Oceanography Syllabus
Course Objectives
A. Communication Skills:
Upon successful completion of this course the student should be able to:
Communicate in verbal, written and visual forms, the basic information about the geographic, geologic, chemical and biologic features of the world's ocean, and the basic relationships and interactions between ocean, continents, and atmosphere.
B. Qualitative Reasoning Skills:
Upon successful completion of this course the student should be able to:
Evaluate and solve problems related to ocean features and processes by use of maps, charts and graphs of tectonic plate motions

Continue Cancel

Enter (or paste) the text into the text box, then click Continue.
This displays the details page for the text document.

Enter document information.
Enter a display name for the text document, and additional details if needed, then click **Finish**.

**View text document in Resources.**

The text document has been placed in the selected folder.

*Note: You may click on the blue Information icon to the right of the file to see the item description.*
How do I create an HTML page?

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Create HTML Page.

To the right of the folder where you want to create the HTML page, from the Actions dropdown menu, select Create HTML Page.
Oceanography (compound of the Greek words ὠκεανός meaning "ocean" and γραφή meaning "write"), also known as oceanology, is the study of the physical and the biological aspects of the ocean. It is an Earth science covering a wide range of topics, including ecosystem dynamics, ocean currents, waves, and geophysical fluid dynamics; plate tectonics and the geology of the sea floor; and fluxes of various chemical substances and physical properties within the ocean and across its boundaries. These diverse topics reflect multiple disciplines that oceanographers blend to further knowledge of the world ocean and understanding of processes within: astronomy, biology, chemistry, climatology, geography, geology, hydrology, meteorology and physics. Paleoceanography studies the history of the oceans in the geologic past.
Use the Rich Text Editor tools to format the text, add images, links or other HTML items to the document.

Click **Continue** to save your document when you are finished editing.
Enter document details.

Enter a display name for the HTML document, and any other information as needed. Click Finish when done.

View HTML file in Resources.

The HTML page is created and placed in the selected folder.

Note: You may click on the blue Information icon to the right of the file to see the item description.
How do I create a citation list?

Users can create a citation list for books, journal articles, manuscripts, newspapers or musical compositions in Resources. There are two methods for creating a citation list.

**Method 1:** Import a file in RIS (Research Information Systems) format.

**Method 2:** Manually create list.

Go to Resources.

Select the **Resources** tool from the Tool Menu of your site.

**Method 1: Import RIS file.**

To the right of the folder you want to import the RIS citation list, from the **Actions** drop-down menu, select **Create Citation List**.

This displays the New Citation List page.
Enter a name, then Import.

Enter a name for the citation list, then click **Import**.
This displays the Import Citations page.
Click **Choose File**.

Click **Browse** to locate and select the .ris file on your computer.
Click Import.

**Import Citations**

Please select an RIS file to upload or enter the text of an RIS file directly into the text area below.

Import File From:

Choose File oceanography.ris

Import RIS Formatted Data from the Following Text:

Import

Back to Add Citations

Cancel

*Note: The selected .ris filename will appear next to the Choose File button.*
Click Done.

New Citation List
- Citation List Name: Oceanography: An Invitation to
- Email Notification: None - No notification

Add Citations From:
- Search Resources
- Manually Create
- Import

Done

Oceanography: An Invitation to Marine Science 9th Edition
Get It | view citation | edit | remove | export

Done

View citation list in Resources.

<table>
<thead>
<tr>
<th>Title</th>
<th>Access</th>
<th>Created By</th>
<th>Modified</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oceanography: CCN 101 Spring 2018 Resources</td>
<td>Actions</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 10:23 am</td>
<td>1 citations</td>
</tr>
<tr>
<td>Oceanography: An Invitation to Marine Science</td>
<td>Actions</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 10:32 am</td>
</tr>
<tr>
<td>Syllabus and Guidelines</td>
<td>Actions</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 10:32 am</td>
</tr>
<tr>
<td>Readings</td>
<td>Actions</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 10:32 am</td>
</tr>
<tr>
<td>Oceanography Websites</td>
<td>Actions</td>
<td>Entire site</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 10:32 am</td>
</tr>
</tbody>
</table>

> Copy Content from My Other Sites

The citation list is located in the selected folder.
Click on the citation list name.

Clicking on the list name will open the item and display the list of citations.

**Method 2: Manually create citation list.**

To the right of the folder where you want to create the citation list, from the Actions dropdown menu, select **Create Citation List**.

This displays the New Citation List page.
Enter a name for the citation list, then click Manually Create.

Enter citation information, then Save.
Manually enter the citation information, then click **Save Citation**.

**Click Done.**

The citation is listed in the selected folder.
Click on the citation list name.

Clicking on the list name will open the item and display the list of citations.
How do I move a file or folder within Resources in the same site?

Go to Resources.

[Image showing the Resources tool in the Tool Menu]

Select the **Resources** tool from the Tool Menu of your site.

Select one or more items, then click **Move**.

[Image showing a list of files and folders with check boxes]

Check the boxes to the left of the files or folders you want to move, then click **Move**.

*Note: Alternately, if you are only moving one item, you may select Move from the item Actions menu instead.*
Click the clipboard icon (paste moved items here).

To the right of the destination folder where you want to place the files or folders to, click the clipboard icon.

View moved files in new location.

This returns the display to the Resources page with the files or folders now moved to the destination folder.
How do I copy a file or folder within Resources in the same site?

Go to Resources.

Select one or more items, and then select Copy.

Check the box next to the item or items you want to copy, and then select Copy at the top of the Resources listing.

Note: Alternately, if you are copying a single item, you may select Copy from the item Actions menu instead.
Click the clipboard icon.

Click the clipboard icon to the right of the folder where you want place the copied item/s.

*Note: If you prefer, you may select Paste copied items from the destination folder Actions menu instead.*

**View copied item(s).**

This returns the display to the Resources page with a copy of the files or folders in the new location.
How do I copy a Resources file or folder from one site to another site?

Instructors can copy a Resource file or folder from on site to another site.

Go to Resources.

Select the **Resources** tool from the Tool Menu of your site.

Click **Copy Content from My Other Sites**.

This displays the Resource folders located in your other sites.
Select the site containing the files that you would like to copy.

Note: Folder icons that are transparent have no files. Folder icons with a solid fill color contain files and folders.
Select the files or folders you would like to copy.

Check the boxes next to the files or folders you would like to copy to select them.

*Tip: You can use the arrows icon in the upper left to expand/collapse all folders and subfolders at once.*
Click Copy.

This places the Resources page into a temporary display state to facilitate the copying of files.

Navigate to the site where you would like to place the copied files.

You may return to the original site by clicking on the title of the site in the breadcrumbs.
Click the clipboard icon.

To the right of the folder where you want to place the copied items, click the clipboard icon.
View copied files.

This places a copy of the files or folders into the Resources folder in the destination site.
How do I reorder files or folders within Resources?

Anyone with access to view Resources sees the reordered items in the desired order. If an instructor wants students to go directly to Resources to locate content items, this feature allows the items to be placed in a specific order. Or, if you have used the Make a Web Content Link option to place a Resources folder into the Tool Menu, the reorder feature controls the placement of items on that page as viewed by site participants.

The process is the same for reordering both files and folders. However, items must be within the same parent folder in order to be reordered at one time.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.
Click Actions, then Reorder.

In the parent folder, from the Actions drop-down menu, select Reorder. This displays the Reordering page.

Reorder items and Save.

Click and drag the items into the desired order, then click Save.
View reordered items.

<table>
<thead>
<tr>
<th>Title</th>
<th>Access</th>
<th>Created By</th>
<th>Modified</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oceanogr GCN 161 Spring 2016 Resources</td>
<td>Actions</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 10:32 am</td>
<td>4 items</td>
</tr>
<tr>
<td>Syllabus and Guidelines</td>
<td>Actions</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 1:12 pm</td>
<td>3 items</td>
</tr>
<tr>
<td>Readings</td>
<td>Actions</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 11:46 am</td>
<td>87.2 KB</td>
</tr>
<tr>
<td>class01.pdf</td>
<td>Actions</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 11:46 am</td>
<td>87.2 KB</td>
</tr>
<tr>
<td>class02.pdf</td>
<td>Actions</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 11:46 am</td>
<td>87.2 KB</td>
</tr>
<tr>
<td>class03.pdf</td>
<td>Actions</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 10:32 am</td>
<td>5 items</td>
</tr>
<tr>
<td>Oceanography Websites</td>
<td>Actions</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 10:32 am</td>
<td>5 items</td>
</tr>
</tbody>
</table>
How do I upload a new version of a file in Resources?

If a file is linked and active elsewhere in your course site - such as in a Lessons module or an image in a quiz - deleting it from Resources and uploading a new file in its place will break the link. By uploading a new version, your existing links remain intact.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Upload New Version.

To upload a new version of a file, to the right of the file to replace, from the Actions drop-down menu, select Upload New Version.

This displays the Upload New Version page.
Click **Choose File** to locate and select the file on your computer.

This returns the display to the Upload New Version page with the name of the new file.
Click Upload New Version Now.

The file name of the new file is displayed.

Original file is replaced.

This replaces the original file with the new revised file.

Note: The display name for the new file remains the same as the original file.
How do I hide files and folders?

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Method 1: Select the file(s) or folder(s), then click Hide.

This displays the Hide Items Confirmation page.
Confirm action by clicking Hide again.

Are you sure you want to hide the following item(s) from selected site participants? Students or those without permission to read hidden resources will not be able to view items marked as hidden unless they created the items themselves. NOTE: If you hide a folder, all items within it will be hidden as well.

### Hide item(s) confirmation...

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>Added By</th>
<th>Last Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>class01.pdf</td>
<td>87.2 KB</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 11:46 am</td>
</tr>
<tr>
<td>class02.pdf</td>
<td>87.2 KB</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 11:46 am</td>
</tr>
<tr>
<td>class03.pdf</td>
<td>87.2 KB</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 11:46 am</td>
</tr>
</tbody>
</table>

[Hide]  [Cancel]

Items are hidden.

This returns the display to the Resources page with the selected items hidden.

**Notes:**

- Instructors see hidden Resource items as grayed out.
- If you hide a folder, all of the files within the folder are automatically hidden.
Method 2: Click Actions, then Edit Details.

To hide a file or folder, to the right of the file or folder, from the **Actions** drop-down menu, select **Edit Details**.

This displays the Edit Details page for the item.
Hide item and Update.

Under Availability and Access, select Hide this item, then click Update.

Item is hidden.

This returns the display to the Resources page with the selected item hidden.

Notes:
- Instructors see hidden Resource items as grayed out.
• If you hide a folder, all of the files within the folder are automatically hidden.
How do I unhide files or folders?

There are 2 methods Instructors can use to un-hide (show) files or folders.

**Method 1**: Select files or folders / Show

**Method 2**: Actions / Edit Details / Show

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

**Method 1**: Select the file(s) or folder(s), then click Show.

This displays the Show Items Confirmation page.
Click Show again to confirm.

Are you sure you want to make the following item(s) visible to all site participants? NOTE: If you make a folder visible, all items within it will be visible unless individually set as hidden.

### Show item(s) confirmation...

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
<th>Added By</th>
<th>Last Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>class01.pdf</td>
<td>67.2 KB</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 1:52 pm</td>
</tr>
<tr>
<td>class02.pdf</td>
<td>67.2 KB</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 1:57 pm</td>
</tr>
<tr>
<td>class03.pdf</td>
<td>67.2 KB</td>
<td>Kristine Instructor</td>
<td>Feb 15, 2018 1:57 pm</td>
</tr>
</tbody>
</table>

[Show] [Cancel]

Items are now visible.

This returns the display to the Resources page with the selected items available.
Method 2: Click Actions, then Edit Details.

To unhide a file or folder, to the right of the file or folder, from the Actions drop-down menu, select Edit Details.

This displays the Edit Details page for the item.
Select Show this item, then click Update.

Under **Availability and Access**, select **Show this item**, then click **Update**.

**Item is now visible.**

This returns the display to the Resources page with the selected item available.
How do I set the display of a Resources item to a specific time period?

Users can set the availability of a Resource file or folder to display to site participants at a specific date and time and become hidden at a specific date and time.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Edit Details.

To set specific availability of a file or folder, to the right of the file or folder, from the Actions drop-down menu, select Edit Details.

This displays the Edit Details page for the item.
Specify dates.

Under **Availability and Access**, check the boxes next to **From** and **Until**, set the dates and times using the calendar icon, then click **Update**.

**Notes:**

- The "Show this item" radio button must also be selected.
- The "From" and "Until" functionality is optional. You can select to show an item "From" a date/time or show an item "Until" a date/time or both.

**View file or folder in Resources.**

This displays the file or folder in Resources as hidden, except during the specified time period.
Notes:

- Instructors see hidden Resource items as grayed out.
- If you set a specific date/time for the availability of a folder, all of the files within the folder automatically have the same availability date/time restrictions.
How do I remove a file or folder in Resources?

Go to Resources.

Select the **Resources** tool from the Tool Menu of your site.

Select one or more items, then click Move to Trash.

To remove a Resource file or folder select the item(s) by checking the boxes next to each one to be removed, then click Move to Trash.

*Note: Alternately, if you are removing one item at a time, you may select Move to Trash from the item Actions menu instead.*
Click Remove again to confirm.

Items are removed.

Note: If you remove a folder, all of the items inside the folder are also removed.
How do I restore a removed file or folder in Resources?

Users can restore a file or folder they have previously removed from Resources.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Trash tab.

This displays the Resources Restoring Items page.

Select the items to be restored, then click Restore.
Item is restored.

This restores the previously removed items back to the original folder.
How do I add and display contextual information about a file or folder?

Users can add a description to files and folders in Resources. Site participants can view these descriptions by clicking on the information icon located to the right of the item.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Edit Details.

To add contextual information, to the right of the file or folder, from the Actions drop-down menu, select Edit Details.

This displays the item's Edit Details page.
Enter details, then Update.

Enter (or paste) a description of the file or folder in the **Description** box, then click **Update**.

**View item details.**

The description is now available to participants by clicking on the information icon.
How do I notify site participants that content has been added to Resources?

Site owners can automatically notify participants via the Notifications feature that an item has been added to Resources. When used, site members receive an email containing details of the file or link that has been added to Resources.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Add a content item.

See any of the following articles for more information on adding items to Resources:

- adding a file
- adding a URL
- adding a text document
- adding an HTML page
- adding a citation list
When adding an item, select High or Low notification.

Notes:

- When uploading a file, creating a web link, creating a text file, creating an HTML page or creating a citation, the Email Notification dialog box is displayed before confirming file creation.
- Selecting "High" will result in an email being sent to every site participant.
- Selecting "Low" will result in an email being sent to only those participants that have not opted out of "Low" level notifications in their workspace Preferences.
How do I obtain the URL for a file or folder in Resources?

Each file and folder in Resources has its own URL. For example, instructors can create links to folders or files anywhere that the Rich Text Editor appears throughout the site.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Edit Details.

To obtain a file or folder's URL, to the right of the file or folder, from the Actions drop-down menu, select Edit Details.

This displays the Edit Details page for the item.
Copy the URL.

Scroll down the page to find the **File Details** section. Copy the file's unique URL displayed in the **Web Address (URL)** field.

### Copy short URL. (Optional)

An alternative is to select **Short URL** check box and then copy a shortened version of the URL.

*Note: Once you have copied the file's URL, you should not move the file into another folder in Resources. If you change the file's location, the file's link will be broken and no longer functional.*
How do I make a link to a Resources folder appear in the Tool Menu?

Instructors can create a link to a Resource folder and have that link appear as a button in the Tool Menu.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Make Web Content Link.
To create a link to a Resources folder, to the right of the folder, from the **Actions** drop-down menu, select **Make Web Content Link**.

This displays the Make Web Content Link page.

**Enter a title, then Add.**

![Make Web Content Link](Image)

Enter a title for the page link, then click **Add**.

**View folder link in Tool Menu.**

![View folder link in Tool Menu](Image)

This creates a link in the Tool Menu. Clicking the button displays the folder contents.

*Note: Any contextual descriptions that have been added to the folder or files are displayed on the page.*
How do I create a group folder in Resources?

Instructors can create group folders in Resources that are only displayed to students assigned to that group. Instructors must first create the site groups. (See How do I create groups?)

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Create Folders.

To create a group folder, to the right of the root folder, from the Add section of the Actions drop-down menu, select Create Folders.

This displays the Create Folders page.
Enter name and add details.

Under **Availability and Access**, select **Display this folder and its contents to selected groups**, select the group name, then click **Create Folders Now**.
View group folder.

This creates a folder that is only displayed to members of the selected group.

Notes:

- *Instructors and site managers can see and access all group folders.*
- *Students that are not a member of the group will not have the folder displayed in their Resources.*
How do I allow group members to upload content to a group Resources folder?

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Edit Folder Permissions.

To grant uploading permission to group members, select Edit Folder Permissions from the Actions drop-down menu to the right of the group folder.

This displays the folder permissions.

*Note: You will need to make the folder a group folder in order to limit uploading permissions to a single group.*
Modify student permissions and then Save.

In the student column, select **Create resources**, **Edit own resources**, **Delete own resources**, and **Access/create group resources**, then click **Save**.

Group members may now add and edit items.
This allows the students that are members of the group to upload and edit content in the group folder.

Students that are members of the group will have an "Add" section available in the folder's Actions dropdown menu.
How do I allow all students to upload content to a selected folder?

Instructors can allow all students to upload and edit file to a selected folder in Resources. Instructors must first create the folder. (See How do I create folders?)

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Actions, then Edit Folder Permissions.
To grant uploading permission to all students, to the right of the folder, from the *Actions* drop-down menu, select **Edit Folder Permissions**.

This displays the folder permissions dialog box.

**Modify student permissions, then Save.**

<table>
<thead>
<tr>
<th>Permissions</th>
<th>Logged in users</th>
<th>Instructor</th>
<th>Student</th>
<th>Teaching Assistant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create resources</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Read resources</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Edit any resource</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Edit own resources</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Delete any resource</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Delete own resources</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Access/create group resources</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Read hidden resources</td>
<td></td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

In the student column, select **Create resources**, **Edit own resources** and **Delete own resources**, then click **Save**.

**Students may now upload and edit items within the folder.**

This allows the students to upload and edit content in the selected folder.

Students will have an "Add" section added to their *Actions* button displayed next to the folder.
How do I make a file or folder publicly viewable?

Site owners can make a file or folder publicly viewable. This means that the file or folder can be viewed by anyone with the file or folder's URL, even if they're not members of the folder's original site. Some institutions also have a "Search Public Course and Project Sites" button on their gateway page that will allow publicly available files and folders to be searched and viewed.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.
Click Actions, then Edit Details.

To make a file or folder publicly viewable, to the right of the file or folder, from the Actions drop-down menu, select Edit Details.

This displays the Edit Details page for the item.
Make item public, then Update.

Under **Availability and Access**, select the radio button for **This folder and its contents are publicly viewable**, then click **Update**.

*Note: This can be done with files as well.*

**The Resources item is designated as Public.**

*Note: While the content can be viewed by those who are not members of the folder's originating site, the content cannot be searched for or viewed by those who are not logged into your institution's system.*
What is the Resources quota?

Each site's Resources has a quota. That is, the limit to the amount of Resource storage space (in megabytes MB or gigabytes GB) allowed by the institution. Users can see how much storage space is currently being used in Resources and view the allowed quota.

Go to Resources.

Select the Resources tool from the Tool Menu of your site.

Click Check Quota.

This displays the Resources Quota page.
Quota is displayed.

Quota

This is the quota for the current site and your usage of it.

This site is currently using 0% (355 KB) of its 1 GB quota.

Back

The amount of storage space currently being used and the site's quota will be displayed.
How do I attach files from my Home Resources to submissions in my other sites?

You can attach items from My Resources in your Home site to any location in another site where you have permission to add attachments. For example, you may attach a file stored in My Resources to an assignment or forum post in one of your course sites.

Upload item(s) to My Resources.

For information on accessing and uploading files to My Resources, see What are My Resources in Home? and How do I upload files?

Attach a My Resources file to work in another site.

In the site where you want to add an attachment, go to the tool where you want to add it, for example, Assignments.

Go to the item where you want to attach the file.

Click on the item where you want to attach the file, for example, the title of an assignment.
Under Attachments, select files from Home or site.

Click the button or select files from 'Home' or site.

Under Select a resource, expand the folder that contains the file to attach.

Under Select a resource, Home, click the folder with a solid folder icon (Open this folder) that contains the file you want to attach.

To the right of the file you want to attach, click Attach a copy.
Confirm attaching selected file(s).

The name of your selected file will display under *Items to attach*. Depending on how the assignment is configured, you can attach an additional file by choosing **Attach a copy** beside another file.

When you have selected the files you want to attach, click **Continue**.

**File is attached.**

A link to your file will be displayed under **Attachments**.
Announcements Tool
What is the Announcements tool?

The Announcements tool allows for the delivery of messages to the entire class, to groups, or to specific sections within the class. Participants will see the Announcement message displayed in the Announcements area of their Home area, as well as within the course itself. These messages can be set to show immediately, or to show during specific dates. Email notifications can be sent to alert participants of the Announcement message.

To access this tool, select Announcements from the Tool Menu in your site.
How do I add an announcement?

Go to the Announcements tool.

Select the **Announcements** tool from the Tool Menu of your site.

**Click Add.**

Announcements
(viewing announcements from the last 365 days)
Title your announcement and add content.

Give your announcement a title, and then enter the content of the announcement into the Rich Text Editor. You may use the formatting options in the editor to modify the font size or color, add images or links, or embed other content.

Determine who can view the announcement.

By default, all people enrolled in this site see the announcement.

Making the announcement publicly viewable means that you can send a link to the announcement to people outside the course, even outside your instance of Sakai, and the announcement will be viewable by them.
Post announcement to group(s). (Optional)

Access

- Only members of this site can see this announcement
- This announcement is publicly viewable
- Display this announcement to selected groups only

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️ Group A</td>
<td></td>
</tr>
<tr>
<td>❌ Group B</td>
<td></td>
</tr>
</tbody>
</table>

If you have created groups in your course, the option to display to groups is shown. Select the group(s) you want to see the announcement. Only the people in the selected group will see this announcement.

Select when the announcement will be displayed.

Availability

- Show - (Post and display this announcement immediately)
- Hide - (Draft mode - Do not display this announcement at this time)
- Specify Dates - (Choose when this announcement will be displayed)

By default, the announcement is displayed immediately upon posting. You can also choose to Hide it (saving as a draft until you are ready to post it), or you may Specify Dates when the announcement will be available.
Select availability dates. (Optional)

**Availability**

- Show - *(Post and display this announcement immediately)*
- Hide - *(Draft mode - Do not display this announcement at this time)*
- Specify Dates - *(Choose when this announcement will be displayed)*

Check the box beside **Beginning** and/or **Ending** and click the calendar icon to insert the properly formatted date and time when the announcement will begin and/or end.

**Click calendar icon to insert date and time.**

Click the date on the calendar, and use the sliders to select the time. Then click **Done**.

If you want the announcement to display during a specific time frame, choose **Specify Dates**. Select the box beside **Beginning** and/or **Ending** and click the calendar icon to insert the properly formatted date and time when the announcement will begin and/or end.
Add attachments. (Optional)

Attachments

No Attachments Yet

Add Attachments

Click the **Add Attachments** button.

Browse for the file.

If the file is not already in your Resources in the course, click **Choose File** to locate the file on your computer. Click **Continue** to attach the file.

If the file is in your Resources, click **Attach a copy** to the right of the file. Click **Continue** to attach the file.
Notify participants of announcement by email. (Optional)

By default, no email notification is sent. You may also select:

- **High - All participants** to send an email to everyone in the course.
- **Low - Not received by those who have opted out** to send to everyone except people who have intentionally changed their settings so that they don't receive low priority messages.

Click Post Announcement.
How do I edit an announcement?

Go to the Announcements tool.

Select the **Announcements** tool from the Tool Menu of your site.

Click **Edit** below the title of the announcement.

Make your edits.

Make edits based on the "How do I Add an Announcement" tutorial.

Click **Save Changes** when edits are complete.
How do I delete an announcement?

Go to the Announcements tool.

Select the Announcements tool from the Tool Menu of your site.

Select the announcement.

Select the check box in the Remove? column for the announcement you would like to delete, and then click Update.
Confirm deletion message.

Deleting announcements...

Are you sure you want to delete the following announcements?

<table>
<thead>
<tr>
<th>Subject</th>
<th>Saved By</th>
<th>Modified Date</th>
<th>For</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome!</td>
<td>Kristine Instructor</td>
<td>Feb 7, 2016 2:43 pm</td>
<td>site</td>
</tr>
</tbody>
</table>

Click **Remove**.
How do I merge announcements?

The function to merge announcements allows for a central course to push out announcements to other courses. For example, a Nursing Program includes twenty different courses. But a single Nursing Program Master course or project site could be used to push announcements out to all twenty of the Nursing Program courses. Announcements that are merged from the Master course cannot be edited or deleted in the individual Nursing Program courses. Those courses could create additional announcements that would apply to their specific course only. Those would appear in addition to the announcements merged from the Master Course.

Go to the Announcements tool.

Select the Announcement tool from the Tool Menu of your site.
Click Merge.

Select the course to merge from.

Check the box beside the course from which this course will draw its announcements, and then click Save.
Example: Master Site Announcements

This image shows the *Master Nursing* site with announcements created.
Example: Merged Site Announcements

Merged announcements show up in the *Nursing 101* Announcements list, but there is no option to edit here. Announcements can only be edited within their site of origin. Edits made in originating message will display in merged sites once they are saved.
How do I reorder announcements?

Go to the Announcements tool.

Select the **Announcements** tool from the Tool Menu of your site.

**Click Reorder at the top of the screen.**
Drag and drop to re-order announcements.

Click Update.

Reorder Announcements

<table>
<thead>
<tr>
<th>Sort by subject</th>
<th>Sort by author</th>
<th>Sort by beginning date</th>
<th>Sort by ending date</th>
<th>Sort by modified date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment 1 Due Tomorrow</td>
<td>Kristine Instructor</td>
<td>Feb 7, 2018 3:32 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welcome Reception</td>
<td>Kristine Instructor</td>
<td>Feb 7, 2018 3:31 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welcome to the Nursing Program</td>
<td>Kristine Instructor</td>
<td>Feb 7, 2018 3:30 pm</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Update  Cancel
Auto-Sort Options

There are five options that allow you to auto-sort the Announcements:

1. **Sort by subject** - orders the announcements in alphabetical order according to the subject line
2. **Sort by author** - orders the announcements in alphabetical order according to the person who created the announcement
3. **Sort by beginning date** - orders the announcements based on first date of display
4. **Sort by ending date** - orders all announcements based on last date of display
5. **Sort by modified date** - orders the announcements in order based on the creation (or most recent modification) date.

When you click the link, an arrow icon appears beside it showing if the list is sorted smallest to largest, or largest to smallest. In the above illustration, the announcements are sorted by modified date, with the oldest at the top and the most recent at the bottom. If the link is clicked again, the arrow icon points down showing that the most recent announcements are at the top and the oldest ones are at the bottom of the list.
How do I change Announcements tool permissions?

By default, students may only read announcements that have been posted by instructors and other instructor-type roles. But permissions can be changed so that students may create, edit, delete, and even access draft versions of the announcements not yet published.

Go to the Announcements tool.

Select the Announcements tool from the Tool Menu of your site.

Click Permissions.
Modify the permissions for the roles listed.

1. Check the box next to each permission you would like to allow for a given role. (Deselecting a box will remove the corresponding permission.)
2. Click **Save** to save your changes.

In the illustration above, students have been given access to create an announcement and to edit or delete an announcement that they created themselves. With these permissions they can not edit or delete the announcements created by others. (Yellow highlighting has been added for emphasis).

*Note: You may see different roles listed depending on the roles which exist in your site. A role must be present in the site in order for you to modify its permissions. For instance, in a project site, you will see role for Access (i.e. students/participants) and Maintain (i.e. site owners/instructors).*
How do I view announcements?

Announcements are displayed in several locations. You can view them from Home, from an individual course or project site, or from the Announcements tool.

Viewing announcements in Home.

When you are logged in to Home, you will see your Recent Announcements displayed there. Your Recent Announcements in this location will show all announcements from all sites in which you are enrolled.
Click on the announcement subject.

Welcome to the Nursing Program

Saved By
Kristine Instructor

Modified Date
Feb 7, 2018 5:22 pm

Groups
site

Message
Hello and welcome to the Nursing Program.
Viewing announcements within a course or project site.

When you enter a given course or project site, your Recent Announcements for that site only will display on the site Overview page.

Click on the announcement subject.

Welcome to the Nursing Program
(Kristine Instructor - Feb 7, 2018 5:22 pm)
View announcement details.

Welcome to the Nursing Program

Saved By
Kristine Instructor

Modified Date
Feb 7, 2018 5:22 pm

Groups
site

Message
Hello and welcome to the Nursing Program.

Return to List

Viewing announcements via the Announcements tool.

You may also view your announcements by selecting the Announcements tool in the Tool Menu from Home, or from within an individual course or project site.

Note: Remember that Home will display announcements from all courses.
Click on the announcement subject.

View announcement details.

Welcome to the Nursing Program

Saved By: Kristine Instructor
Modified Date: Feb 7, 2018 5:22 pm
Groups: site

Message

Hello and welcome to the Nursing Program.
Communication Tools
What is the Email tool?

The Email tool allows users to send an email message to site participants by role, section, or group, and also provides a field for specifying non-site participant email addresses.

The Email tool works using the sender's external email address, which is specified in the user's account details. Typically, this email address is the user's institutional email.

Note: The Email tool can work in conjunction with the Email Archive tool to post email messages to the course archive.

To access this tool, select the Email tool from the Tool Menu of your site.
What is the Messages tool?

The Messages tool offers a convenient way to send and receive private messages to other members enrolled in the course site. Each course site has its own Messages tool. For example, if you are enrolled in two course sites (Site 1 & Site 2) you will have two separate inboxes, one in each site. When in Site 1 you may send and receive messages to and from members of Site 1. When in Site 2 you may send and receive message to and from members of Site 2.

The Messages tool is like email in some respects but the two have fundamental differences. The Messages tool does not use external email addresses. Instead, you simply select the person you wish to write from the list of enrolled site participants. Also, messages do not leave the system. They are not carried over the Internet like email is; therefore, they remain self-contained with the course or project site.

To access this tool, select Messages from the Tool Menu in your site.
Or, go to Messages directly from your Message Center Notification links.

You may also click on the new message number indicator or envelope icon from the Message Center Notifications shown either in Home, or on the Overview page in your site, to go directly to Messages for a given site.
What is the Chat Room tool?

The Chat Room is a real-time, text-only chat tool within a site. The Chat Room tool can be used for synchronous, unstructured conversations among site participants who are logged into the site at the same time. Only participants enrolled in the same site may chat using the Chat Room.

The Chat Room tool supports multiple rooms and the default room can be set by the site owner. For example, instructors may choose to create an "Online Office Hours" chat room for student questions and answers. Chat rooms for student groups can also be set up as a space to collaborate among group members across distances.

The Chat Room tool alerts users to other participants who have entered the same chat room. This way, users know who is available to talk.

Site owners can specify how many chat messages are archived and for how long, or they can allow participants to configure their own archive settings.

The Chat Room tool does not provide a way to chat privately. By default, all messages are visible to all participants.

To access this tool, select Chat Room from the Tool Menu in your site.