ADMINISTRATOR GUIDES
# Table of Contents

Administrator Guides .............................................................................................................................................. 3  
Course Roles ...................................................................................................................................................... 4  
Term Dates / Course Dates / Concluding & Resetting Courses .............................................................. 8  
Add Non-Yale Users (Guest Users) to Canvas ......................................................................................... 12  
How to Merge Course Sections .............................................................................................................. 16  
Non-Academic Courses (Project Sites) .................................................................................................. 20
Administrator Guides
Course Roles

Below is a description of the roles available within a Canvas course site

Faculty Roles

Instructor

- **Primary Use:** Official instructor(s) of record for the course. These users will be automatically added to course sites by the registration system.
- **Permissions:** Full course permissions to add/edit/delete/copy course content and manage manually added users.
- **Limitations:** Cannot manage users that are automatically enrolled by the registration system.

⚠️ Avoid manually adding users to course sites with the Instructor role. This role should be reserved for the instructor(s) of record.

Guest Instructor

- **Primary Use:** Unofficial users that need instructor level permissions but are not the official instructor of record. These users must be manually added by the course Instructor or a TA.
- **Permissions:** Full course permissions to add/edit/delete/copy course content and manage manually added users.
- **Limitations:** Cannot manage users that are automatically enrolled by the registration system.

Support Roles

TA

- **Primary Use:** Teaching fellows and teaching assistants who will be supporting the instructor(s) for a course. These users must be manually added by the course Instructor or a TA.
- **Permissions:** Full course permissions to add/edit/delete/copy course content and manage manually added users.
- **Limitations:** Cannot manage users that are automatically enrolled by the registration system. Also, TAs can be restricted so that they can only view the course section they are assigned to manage.
Grader

- **Primary Use:** TAs or other staff. These users must be manually added by the course Instructor or a TA.
- **Permissions:** Add/edit student grades and add/edit/delete assignments and quizzes.
- **Limitations:** Cannot manage users or any other course content.

⚠️ Graders are NOT anonymous in Canvas. If you need an anonymous grader, please contact canvas@yale.edu for more information.

Designer

- **Primary Use:** Departmental and administrative staff supporting the creation of course sites. These users must be manually added by the course Instructor or a TA.
- **Permissions:** Add/edit/delete course content. Can add other TAs and Guest Instructors.
- **Limitations:** Cannot manage student users and cannot update/edit student grades.

Accessibility Support

- **Primary Use:** Accessibility support staff that are assisting faculty.
- **Permissions:** Add/edit/delete course assignments, files, announcements, discussions, and pages.
- **Limitations:** Cannot manage users, cannot update/edit/view student grades, and cannot add/edit/delete all other course content.

Librarian

- **Primary Use:** Librarian staff that are assisting faculty.
- **Permissions:** Add LibGuides links to Course Navigation.
- **Limitations:** Cannot manage users, cannot update/edit/view student grades, and cannot add/edit/delete course content.

Student Roles

Student

- **Primary Use:** Students who are officially enrolled in a course and have sealed their registration worksheet. These users will be automatically added to course sites by the registration system.
- **Permissions:** View course content and participate in course activities and assignments.
- **Limitations:** Cannot view or modify course settings or view other students' grades or assignments.
Avoid manually adding users to course sites with the Student role. This role should be reserved for officially registered students.

**Shopper**

- Avoid manually adding users to course sites with the Shopper role. This role should be reserved for officially registered students during Yale's Shopping Period.
- **Primary Use:** Students who are officially enrolled in a course and have NOT sealed their registration worksheet. These users will be automatically added to course sites by the registration system.
- **Permissions:** View course content and participate in course activities and assignments.
- **Limitations:** Cannot view or modify course settings or view other students' grades or assignments.

**NOTE:** Users will only have the Shopper role during Yale's official shopping period (plus a week or so grace period). As students seal their worksheets, their Shopper role will automatically do one of the following:

1. Change from Shopper to Student for courses the students plan to complete OR
2. Be completely removed from courses they drop.

**Auditor**

- **Primary Use:** Students who have officially registered to audit a course. These users will be automatically added to course sites by the registration system.
- **Permissions:** View course content and participate in course activities and assignments.
- **Limitations:** Cannot view or modify course settings or view other students' grades or assignments.

Avoid manually adding users to course sites with the Auditor role. This role should be reserved for officially registered students.

**Guest Student**

- **Primary Use:** People who are unofficially requesting to audit or participate in a course. These users must be manually added by the course Instructor or a TA.
- **Permissions:** View course content and participate in course activities and assignments.
- **Limitations:** Cannot view or modify course settings or view other students' grades or assignments.
Viewer

- **Primary Use:** For users who would like to view the course only.
- **Permissions:** View course content and post to discussions.
- **Limitations:** Cannot view or modify course settings or view other students' grades or assignments.

Roles to Avoid

Teacher

- **Primary Use:** Please do not use.
- **Permissions:** Full course permissions to add/edit/delete/copy course content and manage manually added users.
- **Limitations:** Cannot manage users that are automatically enrolled by the registration system.

Observer

- **This is a default Canvas role and is not recommended for use.**
- **Primary Use:** Typically used in the K-12 arena to allow parents to view and monitor their children's progress.
- **Permissions:** View course content. When linked to a student account, this user can also see the associated student's assignment submissions and grades.
- **Limitations:** Cannot add/edit/delete content or participate in any activities.

💡 For more help, please contact canvas@yale.edu.
This article describes the differences between term dates and course dates. It also provides details and instructions on concluding and resetting courses.

**Term Dates**

Term dates that are set globally which help to manage user's "dashboard" and "all courses course lists" to show courses completed during a previous term under a "Past Enrollments" heading. Courses that are concluded by Term dates are still visible to all instructors and participants, but cannot be modified after the end date (Admins can intervene to undo this). Term dates can be overridden by course dates.

**Canvas Term End Dates**

**Fiscal Year Terms**

<table>
<thead>
<tr>
<th>Term</th>
<th>Start</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY22</td>
<td>July 1, 2022 12:01 am</td>
<td>June 30, 2021 11:59pm</td>
</tr>
<tr>
<td>FY21</td>
<td>July 1, 2021 12:01 am</td>
<td>June 30, 2020 11:59pm</td>
</tr>
<tr>
<td>FY20</td>
<td>July 1, 2020 12:01 am</td>
<td>June 30, 2019 11:59pm</td>
</tr>
<tr>
<td>FY19</td>
<td>July 1, 2019 12:01 am</td>
<td>June 30, 2018 11:59pm</td>
</tr>
</tbody>
</table>

**Academic Terms**

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Fall &amp; Spring</th>
<th>Summer</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021-2022</td>
<td>August 31, 2022 11:59pm</td>
<td>August 31, 2022 11:59pm</td>
</tr>
<tr>
<td>2020-2021</td>
<td>August 31, 2021 11:59pm</td>
<td>August 31, 2021 11:59pm</td>
</tr>
<tr>
<td>2019-2020</td>
<td>August 31, 2020 11:59pm</td>
<td>August 31, 2020 11:59pm</td>
</tr>
<tr>
<td>2018-2019</td>
<td>August 31, 2019 11:59pm</td>
<td>August 31, 2019 11:59pm</td>
</tr>
</tbody>
</table>
Course Dates

Course dates are set at the individual course level through the course's "Settings" area. Course dates override term dates which allows instructors to give students access to participate in the course after the term date as past. To prevent students from being able to participate after the course end date, instructors will need to also select the option "Users can only participate in the course between these dates". Courses that are concluded by the course dates are still visible to all instructors and participants.

💡 Please note: Course dates do not override term dates unless you also select the check box for "Users can only participate in the course between these dates"

Manually Concluded Courses

Courses can be concluded manually by clicking the "Conclude" button in a course's "Settings" area. Manually concluded courses are still visible to all participants, but cannot be modified (this can be undone by an administrator). Student enrollments are shifted to "Prior Enrollments" and will not appear within the People tool unless you opt to view prior enrollments.

Reset Courses

Resetting a course deletes the course site and creates a brand new empty course shell for the course which only contains the user enrollments from the original site (this can be undone by an admin).

Course Access by Role

<table>
<thead>
<tr>
<th>Role</th>
<th>Permission</th>
<th>Term Date Conclude</th>
<th>Course Date Conclude</th>
<th>Manual Conclude (click button)</th>
<th>OLD COPY Reset Course</th>
<th>NEW COPY Reset Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can view course</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
<td></td>
</tr>
</tbody>
</table>

Poorvu Center for Teaching and Learning
<table>
<thead>
<tr>
<th>Role</th>
<th>Permission</th>
<th>Term Date Conclude</th>
<th>Course Date Conclude</th>
<th>Manual Conclude (click button)</th>
<th>OLD COPY Reset Course</th>
<th>NEW COPY Reset Course</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Can add/edit content</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td></td>
<td>Course appears in Dashboard</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td></td>
<td>Course appears in Past Enrollments</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Student</td>
<td>Can view course</td>
<td>YES</td>
<td>YES$^2$</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td></td>
<td>Can add/edit content</td>
<td>NO</td>
<td>YES$^3$</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td></td>
<td>Course appears in Dashboard</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td></td>
<td>Course appears in Past Enrollments</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>General</td>
<td>Enrollments moved to &quot;Prior Enrollments&quot;</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td></td>
<td>Can import content into next term courses (or new site)</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td></td>
<td>Can be</td>
<td>YES$^1$</td>
<td>YES$^4$</td>
<td>YES$^5$</td>
<td>YES$^6$</td>
<td>YES$^7$</td>
</tr>
</tbody>
</table>

Page 10

Poorvu Center for Teaching and Learning
<table>
<thead>
<tr>
<th>Role</th>
<th>Permission</th>
<th>Term Date Conclude</th>
<th>Course Date Conclude</th>
<th>Manual Conclude (click button)</th>
<th>OLD COPY Reset Course</th>
<th>NEW COPY Reset Course</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>overridden/ undone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Who can override/ undo</td>
<td>Admin</td>
<td>Instructor/ Admin</td>
<td>Admin</td>
<td>Admin</td>
<td>Admin</td>
</tr>
<tr>
<td></td>
<td>Offical Course - Banner Feed Fix?</td>
<td>NO</td>
<td>NO</td>
<td>YES?</td>
<td>YES?</td>
<td>YES?</td>
</tr>
</tbody>
</table>

1. Admin will need to temporarily move course into an active term, change course end date, return course to correct term.
2. Students can see the course as long as the instructor has not selected the option to "Restrict students from viewing course after end date".
3. Students can participate in the course as long as the instructor has not selected the option "Users can only participate in the course between these dates".
4. Instructor or Admin can change the Course End date and/or the options from 2 & 3 above.
5. Admin will need to "Un-Conclude" course and then add back all of the users (instructors, TAs, & students). Adding back the users will add back their assignment submissions.
6. Resetting a course deletes the original copy of the course and creates a brand new empty course site which keeps all enrollments. The old site can be restored by an admin using the Canvas Course ID and by re-enrolling all users.
7. If original copy of course is restored, new copy should be deleted by an Admin.

? - Banner may over-write these changes during the next feed if the course is in a current, active term.

For more help, please contact [canvas@yale.edu](mailto:canvas@yale.edu).
Add Non-Yale Users (Guest Users) to Canvas

Please follow these steps to request Canvas accounts for non-Yale users. These are also known as guest accounts. All guest account requests are submitted through our Guest Account Request Form.

- Request a large number of accounts
- Request a single account

### Bulk Requests

⚠️ NOTE: The process for bulk requests has changed - please review the information below.

Bulk requests are submitted through the Guest Account Request Form.

### Download the Bulk Guest Account CSV Template

1. Go to the Guest Account Request Form.
2. On the form, select the option to request more than one guest account.
3. Read through the instructions on the form and download a copy of the Bulk Guest Account Template.
4. Enter in your user data into the template following the guidelines below under Format For Your CSV File.
5. Save your completed file as a CSV (Comma Delimited)(*csv) file.
   
   NOTE: Do not save the file as CSV (Macintosh), CSV - UTF-8 (Comma delimited) or CSV (MS-DOS).

We recommend that you always download a fresh copy of the template each time you need to submit a bulk request to ensure that your submission is not corrupted in any way.

### Format For Your CSV File

After you download a copy of the Bulk Guest Account Template from the form, you will need to enter the information for each user you are requesting into the CSV template file.
Below is a description of what information should be included. A sample row (Row 2) is provided in the template file as an example of how to format your data - please remove the sample student row before you enter you user data.

The template includes 3 columns - for each column, you will enter in the information as follows:

1. **full_name** - Enter the user's first name and last name (Example: John Doe)
2. **password** - Enter a generic password of at least 8 characters.
3. **email** - Email address

**NOTE: Do not change the column heading titles in Row 1 of the template file.**

You will likely want to pick one generic password that you give to all of your students. When the student logs in, they will be able to change their password to something unique. For instructions on how guest users change their password, please visit this help article. Please keep in mind that passwords need to be eight or more characters.

⚠️ **NOTE: Files must be in the CSV format and header names must not be modified. Any deviation will cause the bulk account creation to fail, and the file will be sent back to you for revision.**

## Submit Completed File

1. Go back to the [Guest Account Request Form](#).
2. Make sure that you have selected the option to create multiple guest accounts [1].
3. In the upload area, click the "Choose File" button [2].
4. Navigate to and select your completed template.
5. Click the "Upload" button [3].
6. Click the "Submit Form" button [4] to submit your accounts for processing.
Please allow 3-5 business days for these requests to be completed.

You will be notified when the guest accounts have been created. Guest accounts will NOT automatically be added to any courses. See below for adding students.

**Single Account Requests**

Single guest account requests are submitted through the Guest Account Request Form.

1. Go to the Guest Account Request Form.
2. On the form, select the option to request only one guest account.
3. Complete the form with the user's name, email address, and password *(optional)*.

You will be notified when the user account has been created. Guest accounts will NOT automatically be added to any courses. See below for adding students.

**NOTE:** You can set up a password for a single account or you can skip the password and the user will be emailed asking them to complete registration and set up their own password.
Add students

Once the account(s) are created, you can add them to any course by going to the course site and using the "People" tool. You can add people using their email addresses. For instructions on how to add users to a course, please visit this help article.

💡 For more help, please contact canvas@yale.edu.
How to Merge Course Sections

Merging course sections allows you to move section enrollments from individual courses and combine them into one course. This feature is helpful for instructors who teach several sections of the same course and only want to manage course data in one location. Instructors can allow students to view users in other sections or limit them to only view users in the same section. Section names do not change when they are merged; the section is just moved to another course.

⚠️ NOTE: This is not an official cross-listing process. Courses that should be cross-listed in the registration system (Banner) will need to be done through the Registrar's Office.

Merging should be done while the courses are still unpublished and no course work has been submitted by students. Although you can un-merge sections, you will not want to do so if students have already submitting assignments and classwork.

The individual section sites are not maintained. If an instructor needs to have a combined site as well as the individual section sites, they will need to request an umbrella site through our umbrella site request form.

Merging Course Sections

1. Before you begin this process, go to the "Settings" area of the course site you want to contain all sections (parent course) and copy the Course ID number. This number can be found at the end of the URL of the course site as shown below.
2. Once you have the course ID number, navigate to the course you want to merge (child section). Go to "Settings" and click on the "Sections" tab.

3. On the sections screen, click on the title of the child section you'd like to move to the parent course.
4. On the next screen, click the "Cross-List this Section" button.

5. In the pop-up that appears, enter the course ID number of the parent course into the search box.

6. Confirm that the course you have selected is correct. If everything is correct, click the "Cross-List this Section" button.

7. The merged section now appears in the new course. The breadcrumbs show the new course code.
For more help, please contact canvas@yale.edu.
Non-Academic Courses (Project Sites)

In some instances, it is possible to create non-academic course sites (project sites) in Canvas. Project Site requests will be honored on a case by case basis. Please review the guidelines and restrictions for project sites below before you submit a request for a Project Site.

💡 If your project site meets the criteria listed in this article, please fill out the Project Site Request Form. Upon receiving your request, you may be asked to schedule a consultation with a member of the Canvas @ Yale Support Team.

**NOTE:** All new project site requests require a consultation with a member of the Canvas @ Yale Support team.

Project Site Requirements

**REQUESTS:**

- All project sites request must come from a Yale faculty member or Yale faculty support staff member.
- All project sites expire at the end of the term or fiscal year it was created.
- After expiration, you will need to request a new site in Canvas via the Project Site Request Form.
- Project Site requesters manage the content and enrollments in the site.

**EXCLUSIONS:**

- Project sites are not for staff training/sharing/communicating.
- Project sites are not for student-led groups or organizations.

**SITE RESTRICTIONS:**

- **User Audience and Enrollments**
  - Project sites may contain Yale NetID holders.
  - Project sites that enroll non-Yale users are subject to licensing fees.
  - Project site enrollments must not exceed 250 users (if you need additional users, you will need to consult with the Canvas @ Yale Support Team).

- **Site Content:**
  - Project Sites cannot be made publicly available.
• Project Sites must not contain high risk data anywhere within the site.

⚠️ Project sites that violate the above policies are subject to re-evaluation and may not be renewed.

Alternative Solutions

Depending on your needs, there are other solutions that may better suit your situation. Please review these options as alternative solutions should Canvas not be the right fit for your request.

File Sharing

Box / Dropbox / Google Drive / OneDrive

• Used for sharing files.
• Has ability to set granular permissions on each file and folder.
• If you have HIPPA, FERPA, or 3-lock data - you must use Box.
• Check out Yale's help article comparing Box, Dropbox, and Google Drive.

Interfolio

Used for faculty search or review, promotions and tenure cases. These use cases will not be allowed in Canvas due to their sensitive nature. All search/review and promotion/tenure cases must use Interfolio or another Yale approved system specifically designed for these tasks.

For more information, please visit the Interfolio - Introduction and Tips site.

Communication Solutions

Mailman

• Used for creating email lists (listserv email addresses).
• Mailman lists can be public (anyone can join) or private (join by invitation only).

For more information, check out the ITS information page on Mailman Lists.
Project / Process Management

BaseCamp

BaseCamp is a project management tool used to track progress and facilitate team communications during a project. BaseCamp provides the ability to create, assign, and track to-dos, create discussions and feedback and to quickly and automatically summarize progress.

BaseCamp is available for use to anyone in the Yale community with an active NetID.

For more information please visit the ITS BaseCamp information page.

Scheduling Tools

Calendly

Calendly is a scheduling tool that connects to your calendar to help you schedule meetings. You can set up the kind of meetings you’d like to schedule. Calendly then produces a link that you can share that allows people to select a time for that meeting that works for them, and is a free slot in your calendar.

NOTE: This is a free to individuals tool that is not Yale affiliated or supported.

Multipurpose Solutions

CampusPress

• Multipurpose tool with capabilities:
  • Website
  • Blogging

• Can be made publicly available or can be locked to site members.

For more information, visit the Yale CampusPress site.

EliApps for Education

EliApps (Google Apps for Education) is a collection of tools, apps, and collaboration services including email, calendars, and more used by undergraduates and students in the Yale Graduate School of Arts and Sciences.

EliApps includes:

• Google Classroom - a streamlined, easy-to-use tool that helps teachers manage coursework. With Classroom, educators can create classes, distribute assignments, grade and send feedback, and see everything in one place.
• **Google Groups** - allows users to create and manage groups of people to communicate and collaborate. Can be used for email communication and document sharing.

• **Google Drive** - a personal cloud storage service which allows users to store and share folders, files, and collaborative documents (Google Docs, Google Sheets, etc...).

• **Google Sheet, Google Docs, Google Slides**, etc... for cloud hosted word processing and document creation that allows for real-time document collaboration with other users.

For more information, go to the Yale ITS site on [EliApps for Education](#).

**Yale Connect (aka OrgSync)**

• Used for student organizations and groups.

• Allows for posting/sharing content, creating events, and messaging.

For more information, check out the Student Organization's [Yale Connect Information Site](#).

**Microsoft Teams**

• Create different channels to communicate and collaborate

• Share files and create a library for just your team on OneDrive

• Integrates with your Outlook calendar

For more information, go to the Yale ITS site on [Using Microsoft Teams](#).

**Non-Yale Canvas**

Instructure, the the vendors or Canvas, offers a [free to individuals version of Canvas](#). This allows you to create course sites and invite anyone. You and users you wish to participate to must create an account, as it is a completely separate instance of Canvas outside of Yale. While it is the full version of Canvas, it is only has the basic/native features, as any external applications that are provided by Yale do not exist in this free version.

NOTE: This is a free to individuals tool that is not Yale affiliated or supported.

**Renewing an approved Project Site**

If your project site has expired and you need a new site, please complete the [Project Site Request form](#) and select the option to renew.

Prior to receiving your new site, you may be asked to complete a consultation with our team so that we can update you on new tools and features and to ensure that your Canvas site is meeting your needs.

💡 For more help, please contact canvas@yale.edu.