JENZABAR®

e-Racer™
Learning Management System

e-Racer version 1.6.x

Faculty Guide

February 13, 2012

Legal Disclaimer

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Preface

This guide explains how teachers can use e-Racer to manage their courses and interact with students.

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About e-Racer

e-Racer is a web-based learning management system, or LMS. e-Racer is a component of Jenzabar's Internet Campus Solution (JICS), an online portal where members of your school community can collaborate. At most sites, e-Racer's functionality is accessed through the Academics tab in your portal (though your setup could be different).

Intended audience

This guide is intended for faculty members (people who are members of the Faculty role in JICS). Portal administrators — people who are members of the Administrators role — may also find this guide useful.

This guide is intended for sites using version 1.6.x of e-Racer. It covers features of e-Racer and some features that are considered part of base JICS.

For an overview of features covered by this guide, see the Introduction on page 19.

Conventions used in this guide

This following sections describe conventions used in this guide.

Terminology

This guide refers to your JICS site as **the portal**. Your school probably has its own name for this site, but portal is the term that we use generically for any JICS web site.

Additionally, your school probably uses its portal in conjunction with another Jenzabar product, such as Jenzabar CX or Jenzabar EX. This guide refers to each of these as **the ERP system**. Each ERP system has its own documentation. If you need help locating ERP documentation, check with your portal administrator.

Illustrations and logos

The illustrations in this guide were created using the default artwork and site design in effect when JICS was installed. If your site has been customized with your school's own logos, artwork, and content, your view will differ.

Typographical conventions

The following table summarizes the icons and typographical conventions used in this guide.

Style	Description
black bold	Indicates a term that is being used and defined for the first time. Also used to introduce procedures and for emphasis.
gray bold	Used to quote the names of labels and options as they are displayed in the portal interface.
gray bold italic	Used to represent text in system-generated messages and labels, when the text would vary depending on the name that you gave something. For example, when you edit a page, the system displays a label that says **Edit page *name of page***, where ***name of page*** is the name of your page.
italics	Used for document titles and for emphasis.
blue	Indicates that the text is a hyperlink to either another place in this document or to a URL.
`monospace`	Used for file names, menu paths, and text that you enter.
`italic monospace`	Used to identify user input in situations where the text is not literal. For example, if we want you to enter the name of a course you teach, this might be represented as *`YourCourse`*.
	This icon is used alongside a note or a recommended practice.
	This icon is used alongside a cautionary note.

For more information

In general, more information on your portal is available at MyJenzabar.net (http://www.myjenzabar.net/ics/).

| *This section assumes that you have permission to log in to MyJenzabar. If you do not have permission, check with your portal administrator. Note that your portal administrator may also be able to brief you about any defects that exist in the product.*

e-Racer

Additional titles that cover e-Racer include:

- *Faculty Guide* (this document)

- *Release Notes*

To find these documents, log in to MyJenzabar and choose **Support** > **e-Racer** > **e-Racer V1.6 Resources**.

There is also an upgrade guide for e-Racer available at **Support** > **e-Racer** > **e-Racer installers.**

Learning Tools

A recorded demo of the Learning Tools portlet is available at **Support** > **e-Racer** > **e-Racer V1.6 Resources**.

Base JICS

Additional titles that cover JICS include:

- *Installation Guide*

- *Administration Guide*

- *Release Notes*

To obtain any of these guides, log in to MyJenzabar, choose **Support** > **JICS - CRMs** > **JICS Downloads for your ERP system**, then use the sidebar at the left to navigate to the appropriate page.

Constituent Relationship Modules

If you are looking for details on a portlet or feature that is not covered by this guide, it may be associated with a Constituent Relationship Module, or CRM, and covered by a different set of documentation. Check with your portal administrator for details.

Providing feedback

If you have comments or suggestions about this document, please e-mail them to JICSDocumentation@jenzabar.net.

Introduction

Welcome to the e-Racer learning management system.

e-Racer is a component of JICS that lets you manage the course sections you teach and interact with students. You can use e-Racer to track attendance, create assignments, and much more. This introduction is designed to acquaint you with the basics of e-Racer and help you navigate the rest of this guide more easily.

In this chapter:

- Key concepts
- Navigating to a course context
- About your course context
- Portlets available for adding
- Other tools
- Additional contexts

Key concepts

Within e-Racer, a series of pages known collectively as a **context**. For each course section you teach, you will have a **course context**, which is the place where you can prepare materials for your students, and where students can interact with you and with one another. Depending on your responsibilities at your institution, you may also have permission to manage additional contexts.

A context is made up of **pages**, which host **portlets**. Each portlet is associated with a specific type of content or activity. For example, the Announcements portlet lets you publish announcements, the Handouts portlet lets you post handouts, and so on.

The ability of a user to view pages and use portlets will vary depending on the **roles** to which that user is assigned. Each role is associated with different privileges, and you have the opportunity to fine-tune these privileges each time you manage permissions for a particular page or portlet.

This section describes these concepts in greater detail.

About the default template

e-Racer comes with a default template for course contexts that includes specific pages and portlets. However, it is possible for your school to develop its own template, which could include more or fewer portlets, as well as a different layout.

If your school is using the default template, then you may want to refer to the navigational instructions in this guide for navigating to certain key portlets. If you are using a custom template, or if you have manually modified the layout of a particular context, then the navigational instructions in this guide may not apply to you.

Additionally, depending on your school's JICS setup, some portlets may not be available.

How a faculty member uses the course context

In general, you can use your course context to do the following types of things:

- Track attendance.

- Post a list of readings.

- Distribute handouts.

- Post useful links.

- Send e-mail to the entire course, or to selected students.

- Start, participate in, and monitor discussions in forums and chatrooms.

- Create tests for students to complete online.

- Track assignments that are completed outside the portal.

- Enter scores for other criteria, such as participation, that you want to affect students' grades.

- Configure the system to generate students' grades for the term based on their assignment grades or attendance, or both.

- Review students' midterm and final grades and submit them to your school's ERP system (for example, Jenzabar EX or CX).

How students and others use the course context

The behavior of a course context varies depending on the permissions of the user.

Students

Typically, students use the course context to do the types of things:

- Complete online tests and upload files.

- Participate in forums.

- Review their attendance records.

- Review their grades — both for individual assignments and for the term overall.

- Download handouts.

- Communicate with other students via chatrooms and e-mail.

By default, all students in your course sections should belong to the "Students" role. Because of this, when students go to the course context, they see a view that is similar to the faculty view, but which has fewer options.

If you need to grant someone student access to your course, you can make the person a "non-roster student." This process is described in "Adding a non-roster student" on page 594.

Additionally, some portlets behave differently depending on one's role — for example, some portlets let faculty members see details about all students, but a student looking at the portlet will see details only about his or her own work. At any time, you can see the student view using the Student Emulation feature, which is described in Chapter 37, "Previewing a context as a student."

Custom roles

If appropriate, you can create custom roles and give those roles specific permissions. For example, you might do this if you want certain students to help manage a forum, or if you want a teaching assistant to be able to grade assignments. The process of creating roles is covered in Chapter 35, "Creating and maintaining roles."

When you create a role, you create the role for use solely in one context (such as your course context). There is a more universal type of role (called base roles, or global roles), but only administrators of the portal can create these.

About portlets and related features

The basic unit of content that might be placed on a page is the portlet. This section offers a few more details about portlets and related concepts.

About portlet views

When you navigate to a page that hosts several portlets, the portlets typically are displayed smaller than they would be if you maximized them, which you can do by clicking on the name of the portlet. The initial, smaller view of the portlet is the **default** view, and the larger view is the **maximized** view. Sometimes the maximized view includes more features and more content than the default view.

About portlet instances

Some portlets can be added to your course context multiple times. Others can exist only once. Each occurrence of a portlet is a called a portlet **instance**. For example, your context might have several instances of the Forums portlet, each devoted to a different subject. But the context can have only one instance of the Attendance portlet. The behavior and rules governing each portlet are major topics of this guide.

There are two levels of permissions that pertain portlets:

- Some portlets have "global" permissions (known as **global portlet operations**), which apply to all instances of the portlet on the site. In most cases, each role should already have the global operations that they need, but if you have a user who is having trouble access a portlet, they might need a global portlet operation. If you need help with this, contact an administrator for your system.

- Some portlets have permission that apply to only one instance of a portlet. You manage this type of permission through the portlet instance itself. These permissions are described throughout this guide, in the sections that pertain to each portlet type.

Details on managing permissions specific to the portlets are described throughout this guide, usually under headings labeled "Managing permissions."

Adding pages and sub-sections

If appropriate, you can augment your course context by adding pages to it. For details on adding a page to your context, see "Working with pages" on page 568.

If you have a large number of pages to add, you might want to group the pages into a sub-section. When you do this, you are essentially created a sub-context to your course context. A context is governed by its own set of context-specific roles. So, a sub-context that you create you will not be able to use roles that you defined at the higher level (the course context). This might be desirable if you want to put another role in charge of managing the sub-context (but not have that role be able to manage the course in general). For more details on sub-sections, see "Working with sub-sections" on page 577.

Navigating to a course context

There are a few ways to navigate to the context for a course section that you teach. The simplest is through the Quick Links sidebar, which is described below.

To navigate to a course context using the Quick Links sidebar:

1 Log in to the portal.

2 In the **Quick Links** area of the sidebar at the left, expand the link labeled **My Courses**.

The area expands to show links to all of your course sections.

3 Click the section whose course context you want to display.
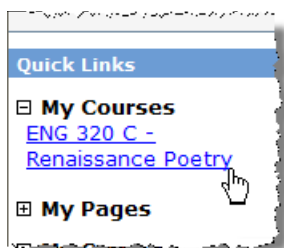
The system displays the context for the course section. The exact layout of the context may vary depending on design choices made at your school. For details on the default setup that JICS uses, see .

About your course context

This section describes both the key e-Racer portlets and the structure of the default template for course contexts. If your school has created its own template, or if you have modified your own context, then the layout described in this section may not match what you see. However, the behavior of the portlets is always the same no matter what pages or tabs they are associated with. So even if your school uses a different template, you can refer to the sections below for a quick snapshot of how the portlets are meant to be used.

Main page

In the default layout, every course context has a **Main** page, which is the page that is automatically displayed when you first navigate to the context.

Portlets on the Main page

The default layout of the Main page includes the following elements:

- **About This Course** — You can use About This Course to list details about the course section. This portlet, though it is named "About This Course," is actually an instance of the Custom Content portlet, which is described in Chapter 22, "Custom Content."

- **Announcements** — You can use this portlet for posting announcements. Announcements can be posted for all members of the course context or for particular roles or individuals only. For details, see Chapter 13, "Announcements."

- **Bookmarks** —This portlet lets you post URLs, or bookmarks, that might be useful to other members of the context. For details, see Chapter 15, "Bookmarks."

- **Calendar** — The Calendar portlet can be used to display and manage calendars. Note that the system creates a calendar for each of your course sections. Each course calendar automatically lists regularly scheduled meetings of the class. Further, you can manually add events to the calendar and, when you create assignments, you can configure their due dates to show up. For details on the Calendar portlet, see Chapter 17, "Calendar."

- **Handouts** — You can use the Handouts portlet to upload files that you want students to have. For details, see Chapter 24, "Handouts."

Other pages in the context

From the Main page — and from any page in the context — you can navigate to other pages using the sidebar on the left side of the screen. By default, the other pages in the context include the following:

- Attendance
- Collaboration
- Course Information
- Coursework
- Gradebook
- Syllabus

As illustrated below, each of these pages is listed in the sidebar on the left side of the screen. When you select one of the pages in the sidebar, the system displays that page and expands the sidebar to include a bulleted list of the portlets on that page.

Attendance

The Attendance page hosts the **Attendance** portlet, which you can use to track whether students are present, tardy, or absent. As part of this, you can use the portlet to specify how attendance is tracked and manage a variety of preferences. These options are described in Chapter 8, "Tracking attendance."

Some settings related to attendance — for example, the extent to which attendance affects students' midterm and final grades — are configured through the Gradebook portlet, which is described in Chapter 9, "Configuring the Gradebook."

By default, the content and layout of the Attendance page cannot be modified, which means that you cannot remove the Attendance portlet, nor can you add other portlets to this page.

Collaboration

By default, the Collaboration page hosts three portlets.

- **Forums** — The Forums portlet is used for discussions. For details, see Chapter 23, "Forums."

- **Chat** — The Chat portlet is an online chatroom. For details, see Chapter 19, "Chat."

- **Coursemates** — The Coursemates portlet is an online roster of all students and faculty associated with the course section. You may want to use this portlet to send e-mail to one or more students. For details, see Chapter 21, "Coursemates."

Course Information

By default, the Course Information page hosts only portlet — the **Course Information** portlet, which lists details about the course section and the person teaching it. This information is derived automatically from the system when the course context is created.

By default, the content and layout of the Course Information page cannot be modified, which means that you cannot remove the Course Information portlet, nor can you add other portlets to this page. The Course Information portlet itself also cannot be modified.

Coursework

The Coursework page hosts the **Coursework** portlet, which you can use to do the following:

- Create units for grouping your assignments. You can also set up other ways of classifying assignments. These are described in Chapter 1, "Setting up the portlet."

- Create assignments. These can include assignments that students will complete in the portal, as well as those that might take place offline, such as an oral presentation. This is described in Chapter 2, "About assignments," and Chapter 3, "Creating assignments."

- Add content to online tests. Students log in to the portal to take these tests, and the tests can also be automatically graded. This process is described in Chapter 4, "Adding content to online tests." If you prefer, you can require students to use a special browser that prevents cheating — this browser is described more in Chapter 5, "Using the e-Racer Locked Browser."

- Give students grades for assignments and provide other feedback. This process is described in Chapter 6, "Managing and grading assignments."

- Review detailed statistics about students' work on a particular online test. Using a feature called Test Analysis, you can review metrics that show which questions were most difficult for students, and so forth. This is described in Chapter 7, "Viewing statistics about online tests."

All of these chapters are part of Part 1, "Coursework."

Note that, by default, the content and layout of the Coursework page cannot be modified, which means that you cannot remove the Coursework portlet, nor can you add other portlets to this page.

Gradebook

The Gradebook page hosts the **Gradebook** portlet, which is used to track students' overall grades for the term. The Gradebook portlet automatically imports data from the Attendance portlet and the Coursework portlet, so you can see at a glance how each student is doing. You can also use the portlet to do the following:

- Assign "weights" to attendance, and to coursework assignments, so the system can automatically calculate students' midterm and final grades.

- Configure how many points (or what percentages) merit an A, B, C, and so forth.

- Override a grade that is automatically calculated by the system.

- Provide feedback to students.

All of the above tasks are described in Chapter 9, "Configuring the Gradebook," and Chapter 10, "Reviewing and adjusting grades."

You can also use the Gradebook portlet to submit midterm and final grades to your school's ERP system, which is described in Chapter 11, "Submitting grades to the ERP system."

By default, the content and layout of the Gradebook page cannot be modified, which means that you cannot remove the Gradebook portlet, nor can you add other portlets to this page.

Syllabus

By default, the Syllabus page hosts three portlets:

- **Course Syllabus** — You can use this portlet to list the agenda for the course section. Though it is named "Course Syllabus," this portlet is an instance of the Custom Content portlet, which is described in Chapter 22, "Custom Content."

- **Downloadable Version** —You can use this portlet to host a downloadable version of the information listed in Course Syllabus portlet. This portlet, though it is named "Downloadable Version," is actually an instance of the Handouts portlet, which is described in Chapter 24, "Handouts."

- **Readings** — You can use this portlet to list recommended and required readings. This list can include a link to an online bookstore, details about the appropriate edition, and whether or not the reading is required. For details, see Chapter 26, "Readings."

Portlets available for adding

If desired, you can add additional portlets to your course context. A few of the portlets you might want to add include:

- **Blog** — With this portlet you can publish blog posts for students to review — or you can set up the portlet so that they publish their own blog posts. This portlet is described in Chapter 14, "Blog."

- **Bulletin Boards** — The Bulletin Boards portlet lets users post messages for other people in the course section. A user can respond to the original poster's message via e-mail (using links in the portal). This portlet is described in Chapter 16, "Bulletin Boards."

- **RSS News Reader** — This portlet works as an RSS Reader. This portlet is described in Chapter 27, "RSS News Reader."

- **Task Manager** — You can use this portlet to assign tasks to other people — such as students or perhaps teaching assistants. For details, Chapter 28, "Task Manager."

For a longer list of portlets you can add, see "Additional portlets" on page 303.

The general process of adding a portlet to page is covered in "Creating a portlet instance" on page 571.

Other tools

This section describes additional tools that support your teaching. Unlike the tools described in "About your course context" on page 25, the portlets and tools in this section do not store information specific to any particular course section. Rather, these are general tools you can use to support any of your course sections or simply to find something you need.

Navigational tools

To assist you with navigating among all of your school's course contexts, e-Racer includes the following portlets:

- **Course Search** — You can use this portlet to search for details about any course sections that exist in the portal and to navigate to their contexts. This might be useful if you want to review details about sections taught by other faculty members. For details, see Chapter 20, "Course Search."

- **All My Courses** — The All My Courses portlet offers a way for you to quickly navigate to your own course contexts. This portlet is not included in the default template for course contexts, but you can add it to your context or to your My Pages area. For details on how the portlet works, see Chapter 12, "All My Courses."

Tools that help you manage materials

e-Racer includes a few tools that let you manage materials and reuse them in multiple course contexts. You can also export content into a course cartridge, for use outside the portal.

The File Cabinet

Every member of the Faculty role has a **File Cabinet**, which you can use to store materials for use in future course sections. For example, you can store any of the following:

- Coursework

- Bookmarks

- Handouts

- Readings

- Course cartridges

Some of these items can also be created from within the File Cabinet portlet.

The File Cabinet is located on a page within your My Pages context. For most faculty members, the content and layout of the File Cabinet page cannot be modified, which means that you cannot remove the File Cabinet portlet, nor can you add other portlets to this page.

For further details, see Chapter 30, "Working with the File Cabinet."

Copy Course Materials

If you teach the same course regularly, or if you teach similar courses, you may want to copy portlets from one course context to another. You can do this using the **Copy Course Materials** portlet, which you access from the Quick Links area of the sidebar. The idea behind this process is similar to the idea of saving something in your File Cabinet for later reuse, but with the Copy Course Materials portlet, you can copy whole portlets in bulk, along with any permissions you have defined for the portlets. This process is described in Chapter 31, "Copying course materials."

Export

The Export feature lets you create a course cartridge that includes content from any course context. Cartridges created this way have a `.imscc` extension and are compliant with the IMS Global Learning Consortium's Common Cartridge v1.1 standard. This process is described in Chapter 32, "Creating a course cartridge."

Course Content Import

You can use the Course Content Import (CCI) portlet to upload a supported course cartridge and integrate its contents into other portlets in your course context. For example, you may want to import cartridge items into the Coursework, Forums, or other portlets. Supported cartridges are those that comply with the IMS Global Learning Consortium's Common Cartridge v1.0 and v1.1 standards. The CCI portlet is described in Chapter 33, "Importing from course cartridges."

Tools for previewing your course context

e-Racer includes a feature for previewing your entire course context as a member of any other role. This feature, called **Student Emulation**, is described in Chapter 37, "Previewing a context as a student."

Tools for creating portal-only elements

e-Racer and JICS also include the following features:

- **Course Creator** — The Course Creator portlet lets an authorized user create courses that are defined and managed entirely through the portal (instead of in conjunction with your school's ERP system). This portlet is described in Chapter 38, "Creating portal-only courses."

- **Portal-only account creator** — The portal-only account creator lets an authorized user create user accounts that exist only in the portal and not in your school's ERP system. This feature can be used only by members of the Administrators role and is described in *Jenzabar's Internet Campus Solution: Administration Guide*.

Additional contexts

In some cases, you may have permission to manage additional contexts besides those for your course sections.

For example:

- If your school uses the Campus Groups feature, you might manage a campus group, which means that you would have administrative privileges in the group's context.

- You may have permission to manage another set of pages within your school's portal.

In each of the above cases, you may be add portlets, manage roles, and so forth, just as you would in your course context. For help managing a context, see Part 6, "Pages, sub-sections, and roles."

Similarly, note that you have a My Pages tab, which is solely for your own use. You have the ability to add pages and portlets to this tab. In fact, your privileges in this tab are similar to your privileges in your course context, though note that there is no Context Manager in this tab (because it is not needed — the tab has no other users besides you).

Part 1: Coursework

This section describes how to set up the Coursework portlet, create assignments, and related tasks.

In this section:

Setting up the portlet

For each course section you teach, you can create and manage assignments in the portal. You do this using the Coursework portlet.

In this chapter:

Key concepts

This section offers an overview of the Coursework portlet and the assignment-creation process.

About the Coursework portlet

e-Racer includes a unique instance of the Coursework portlet for each course section. This portlet instance is the place where students and faculty interact with assignments. For example:

- Faculty members use the Coursework portlet to create and manage assignments.

- Students use the Coursework portlet to take tests, review their own work, and view feedback from faculty.

Assignment classifications

Every assignment in the Coursework portlet is defined using a few key classifications:

- Formats

- Types

- Units

Formats

A Coursework assignment can exist in any of three **formats**.

Online Test

Online tests are created in the portal, and students complete them in the portal. You add content to tests using the **Test Builder**, which is part of the Coursework portlet. Note that online tests are sometimes generically referred to as "tests," and you also will also see this format abbreviated as **online**.

Upload File

An upload-file assignment is completed outside the portal, but it is uploaded and turned in through the Coursework portlet. For example, you might use this format for a term paper that is completed in Microsoft Word and then given to you through the portal. You will sometimes see this format abbreviated as **uploaded**.

Basic

The basic format is intended for any assignments or assessments that can't be tracked easily using the online-test or upload-file format. For example, you could use the basic format to track students' grades on an oral presentation, or their overall participation in the course.

For an additional method of tracking students' performance, see "Working with evaluations" on page 248.

Types

Each assignment you create must be classified as a particular type. In general, the type is a label that helps students understand the nature of the assignment. e-Racer comes with several predefined types, and you can also create your own. The predefined types are:

- Exam

- Homework

- Lab Report

- Paper

- Participation

- Quiz

- Reading

- Test

An assignment's type is completely independent of its format. That is, an "exam" could be an online assignment, a basic assignment, or an uploaded assignment. Similarly, a basic assignment could be a "test," a "lab report," or something else. Often, the Coursework portlet will describe an assignment both by its format and type — for example, as a "basic test," an "online quiz," or an "uploaded paper."

Related to this, note that while an assignment created using the "online test" format is sometimes referred to as a "test," an online assignment can be classified as any type — it can use the "test" type or any other type.

For details on creating, modifying, and deleting types, see "Managing types" on page 51.

Units

A unit is a group of assignments. In any given instance of the Coursework portlet, you must always have at least one unit defined. Apart from this restriction, you can create as many units as appropriate for your course, organizing them with any system you like. For example, you might create a series of units that represent the general progression of the course ("Week 1," "Week 2," and so on), or your units might coincide with topics you will cover ("Faulkner," "Hemingway," and so forth).

For details on creating, modifying, and deleting units, see "Managing units" on page 44.

Understanding the default view

The default view of the portlet varies depending on one's role — faculty and students have different views.

A main feature of both the faculty and the student view is a list of assignments. As the faculty member teaching the course, you can organize this list in a few different ways (and when you do, it changes for all users). The process of rearranging the list is described in "Configuring the portlet" on page 56.

Default view for faculty

The faculty view of the Coursework portlet includes three main components:

- At the upper left, a list of buttons that let you manage several aspects of the portlet instance.
- At the upper right, a list of assignments recently submitted by students.
- A list of assignments, organized either by type or by unit.

Default view for students

The student view of the Coursework portlet includes three main components:

- At the upper left, a list of assignments that are due next.

- A list of assignments, organized either by type or by unit. The student's view of this list may be a subset of the list that you as a faculty member see (because your view will include assignments that you have not yet finished creating). The student view shows only those assignments that the student can go ahead and work on, upcoming assignments that you have specifically set up to be visible to students, and assignments they have already finished.

As with other screens in your course context, you can at any time display the student view of the portlet using the Student Emulation feature.
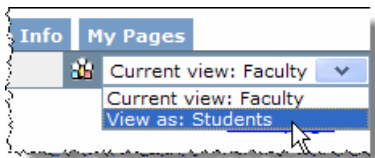
For details on Student Emulation, see Chapter 37, "Previewing a context as a student."

The life of an assignment

The way you set up and process an assignment varies slightly depending on the format that you are using, but the general steps are as follows:

A   Creating the assignment — The process of creating an assignment includes giving it a name and defining basic settings, such as whether or not the assignment is required. This process is described in Chapter 2, "About assignments," and Chapter 3, "Creating assignments."

B   Adding content (online tests only) — With the online-test format, you add content to the assignment using the Test Builder. The process of adding content is described in Chapter 4, "Adding content to online tests."

C   Activating the assignment — After you activate an assignment, students can see it listed in the Coursework portlet, and the following are true:

•   If the assignment is an online test, students can go ahead and take it.

•   If it is an uploaded assignment, students can upload their files.

Activation is controlled by the **Open** field, which is on the main screen where you edit the assignment (described in "Open" on page 74).

D   Grading the assignment — This process of grading completed assignments and providing feedback is described in Chapter 6, "Managing and grading assignments."

E   Viewing statistics about online tests — With any given online test, you may want to review statistics on how students did, and on how effective the test was. You do this using a feature called Test Analysis, which is described in Chapter 7, "Viewing statistics about online tests."

Navigating to the Coursework portlet

The way you navigate to the Coursework portlet will vary depending on whether your school has customized the portal. The following procedure describes how to find the portlet using the system's default layout.

To navigate to an instance of the Coursework portlet:

1   Log in to the portal.

2   Navigate to the appropriate course section:

    a   In the **Quick Links** area of the sidebar, expand the link labeled **My Courses**.

    b   Select the appropriate course section.
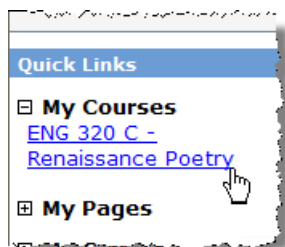
    The system displays the context for the course section.

3   In the sidebar, click the **Coursework** page button.
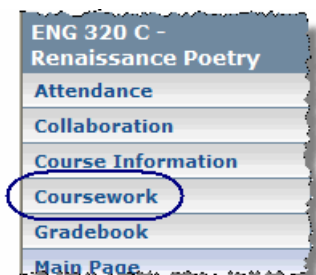
    The system displays the Coursework page, which hosts the Coursework portlet instance for this course section. If this is your first time visiting the portlet instance, the system displays a getting-started message.

    Otherwise, the portlet instance displays a list of controls at the upper left, followed by a list of any assignments you have created, organized either by unit or by type.

    From the main view of the Coursework portlet, you can do any of the following:

    •   Create units, as described in "Managing units" on page 44.

    •   Create assignments, as described in Chapter 3, "Creating assignments."

    •   Add questions to online assignments, as described in Chapter 4, "Adding content to online tests."

Managing units

A unit is a group of assignments. Every assignment must be associated with a unit when it is created. For this reason, setting up your units might be a good thing to do before you begin creating assignments.

About units

This section describes units in a bit more detail.

Attributes of a unit — defined

The main attributes of a unit are its name, date range, and description. You can set these when you create or modify a unit (as described in page 46 and page 48).

Attribute	Required?	Always displayed in the main view?	Purpose
Name	Yes	Yes	To identify the unit for both faculty and students.
Description	No	No — descriptions are displayed only if the portlet is organized by unit. Additionally, a particular unit's description is shown only when that unit is expanded.	To offer additional details on the unit.
Date range	Yes, but if you do not enter a range, the system will automatically make the range extend for the duration of the term.	No — date ranges are displayed only if the portlet is organized by unit. Also: • A unit's full date range is shown only when the unit is expanded. • If the unit is collapsed, only the start or end date is shown.	To give students a general idea of when the material will be covered, and to help determine when the unit will automatically be expanded in the main Coursework view.

Attributes of a unit — illustrated

In your own view of the portlet, the way units display varies depending on how the portlet instance is organized.

If the portlet instance is organized by unit, the names of the units will be featured somewhat prominently (as headings under which the assignments are listed). Additionally, when a unit is

expanded, its description and date range are displayed. Less information is shown for units that are collapsed.

If the portlet instance is organized by type, then only the unit name is displayed, as a column in each table that lists the assignments.

The student views in both cases are similar — although if the portlet is organized by type, the student will see the unit mentioned only in the description of open assignments.

Which units expand by default?

When a Coursework portlet instance is set up so that assignments are grouped by unit, the default view may show some units expanded and some collapsed.

A unit is automatically expanded if:

- The current date is within the date range defined for the unit.

- There are no items within the unit that require the user's attention. For example, for you as a faculty member, this would include an assignment that needs to be graded. For a student, this would include an assignment that needs to be completed. Note that this part of the equation is made on a user-by-user basis — in other words, the same units will not necessarily be expanded for the same people.

Creating a unit

Use this procedure to create a unit.

To create a unit:

1 Navigate to the appropriate Coursework portlet instance, as described on .

2 Click **Manage Units & Types**.
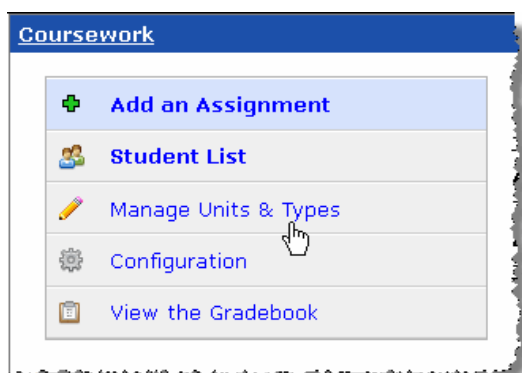
The system displays a screen used to manage both units and types.

3 Click **Add a Unit**.

The system displays a pop-up form.

4 Fill out the fields as appropriate. If you need help with any particular field, see "About units" on .

5 Click **Add unit** to save the new unit.
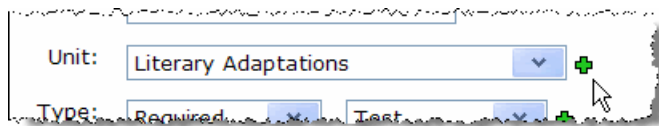
 You can also create a unit while you are adding or modifying an assignment — to get started, just click the green plus-sign icon next to the Unit field.

Modifying a unit

After you create a unit, you may want to go back and change the unit's name, date range, or description.

To modify a unit:

1   Navigate to the appropriate Coursework portlet instance, as described on page 43.

2   Click **Manage Units & Types**.

The system displays a screen used to manage both units and types.

3   Locate the unit you want to modify and click the corresponding edit icon.

The system displays the **Edit a Unit** pop-up form.

4   Make any changes as appropriate. If you need help with any particular field, see "About units" on page 44.

5   Click **Edit unit** to save your changes.

Ordering units

By default, units are presented in chronological order based on their date ranges.
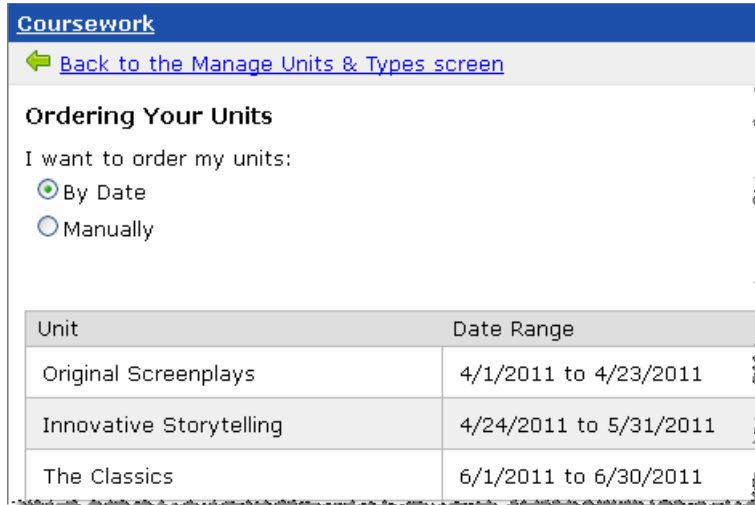
• Even if you are sticking with the default method of chronological ordering, if you have multiple units with the same date range, you may want to manually order those units.

• You might want to manually arrange all of the units and *not* have the placement be determined by their date ranges.

You can use this procedure to do either of those things. Also, if you have been manually ordering units, and you want to go back to having the sequence determined by date, you can use these steps.

To reorder units:

1   Navigate to the appropriate Coursework portlet instance, as described on page 43.

2   Click **Manage Units & Types**.

The system displays a screen used to manage both units and types.

3   Click **Unit ordering.**

The system displays a screen titled **Ordering Your Units**.

4 Select one of the following ordering types as appropriate:

- **By Date**
- **Manually**

5 If you selected **Manually**, the screen updates to let you drag and drop the units. In this case, drag the units into the appropriate order. (To select any unit, click the corresponding black arrows.)

6 When finished, click **Done reordering**.

Deleting a unit

Use this procedure to delete a unit. Note that if you delete a unit that contains assignments, you will be given the option of deleting the assignments or moving them another unit.

To delete a unit:

1   Navigate to the appropriate Coursework portlet instance, as described in .

2   Click **Manage Units & Types**.

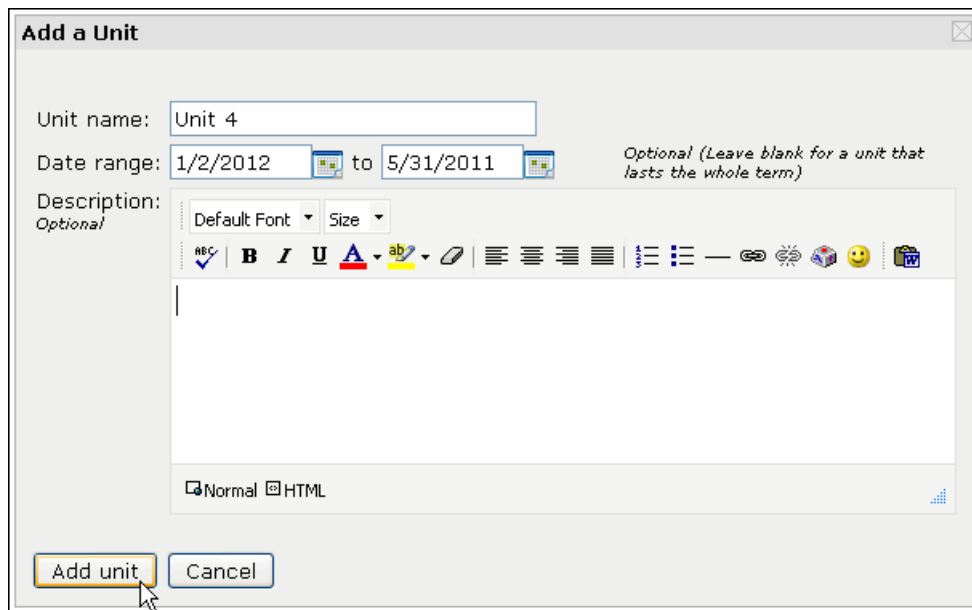The system displays a screen used to manage both units and types.

3   Locate the unit that you want to delete and click the corresponding trash-barrel icon.

The system displays a pop-up:

• If the unit contains assignments, the pop-up asks if you want to move the items to another unit.
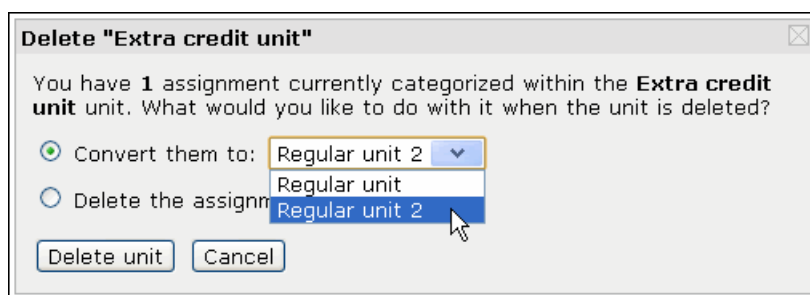
• If you have no assignments in the unit, the pop-up simply asks if you are sure you want to delete the unit.

4   If the unit contains assignments, choose the appropriate option for dealing with them.

5   Click **Delete unit**.

The system removes the unit.

Managing types

A type is a classification, such as "exam" or "paper," that helps give the student an idea of what the assignment is. This section describes how to create, modify, and delete types.

About types

This section describes types in a bit more detail.

Attributes of a type — defined

A type has only one attribute — its name. The name of the type displays in several places:

- In the main view of the Coursework portlet, sometimes as headings (depending on how the portlet is configured).

- In labels and automatically generated messages about assignments. For example, if you create an uploaded assignment of the type "paper," that assignment will often be referred to as "an uploaded paper." In these messages, it is usually assumed that the name of the type is singular, so it's recommended that you use a singular word.

Attributes of a type — illustrated

By default, when you view an instance of the Coursework portlet, the list of assignments is organized so that each unit is displayed as a heading, with that unit's assignments listed below. With this setup, each assignment's type is listed in a column labeled **Type**.

Alternatively, you can choose to organize the view by type rather than unit (this is described in "Changing the grouping method" on page 56). When you do this, the types become more prominent — each is listed as a heading on the page.

The student views in both cases are similar — although if the portlet is organized by unit, the student will see the type mentioned only in the description of open assignments.

Creating a type

Use this procedure to create a type.

To create a type:

1   Navigate to the appropriate Coursework portlet instance, as described on page 43.

2   Click **Manage Units & Types**.

The system displays a screen showing several settings.

3   Click **Add a Type**. This link is midway down on the screen.
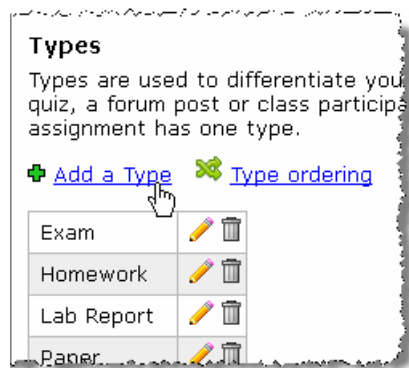
The system displays the **Add a Type** pop-up.

4   Enter a name for the new type.
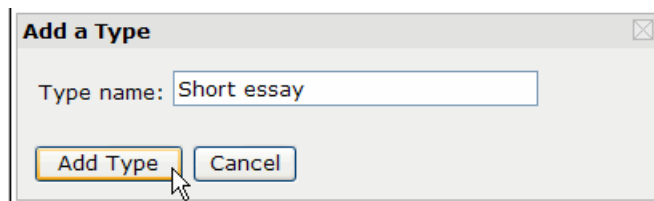
5   Click **Add Type** to save the new type.

The system creates your type.

You can also create a type while you are adding or modifying an assignment — to get started, just click the green plus-sign icon next to the Type field.
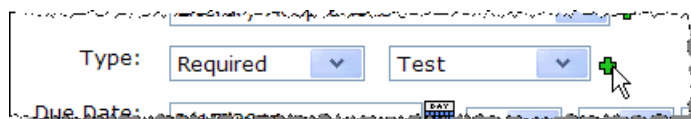
Rename a type

If you want to rename a type, use this procedure.
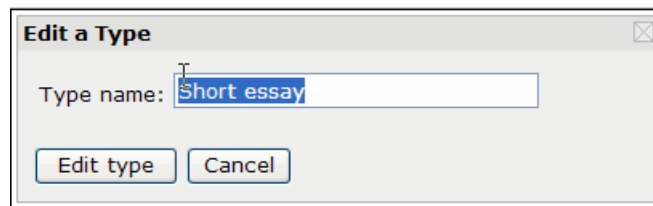
To rename a type:

1   Navigate to the appropriate Coursework portlet instance, as described in page 43.

2   Click **Manage Units & Types**.

The system displays a screen showing several settings.

3   In the area of the screen labeled **Types**, locate the type that you want to rename and click the corresponding pencil icon.

The system displays the **Edit a Type** pop-up.
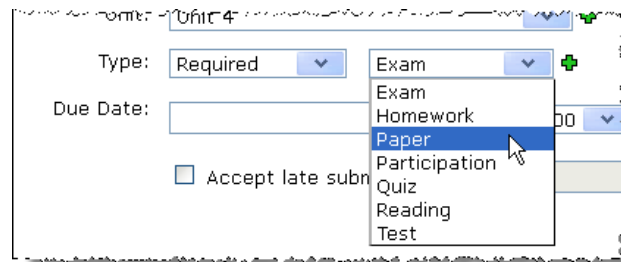
4   Modify the name as appropriate.

5   Click **Edit type** to save the change.

Ordering types

By default, types are ordered alphabetically, but you might want to change this.

The sequence of your types does two things:

- It determines the sequence used within the **Type** drop-down list, which is on the screen where you create or modify an assignment.

- If you have chosen to organize the portlet instance by type (as described in "Changing the grouping method" on page 56), then type-ordering affects the sequence of the types in the main view of the portlet.

To reorder types:

1   Navigate to the appropriate Coursework portlet instance, as described in page 43.

2   Click **Manage Units & Types**.

The system displays a screen showing several settings.

3   Click **Type ordering.**
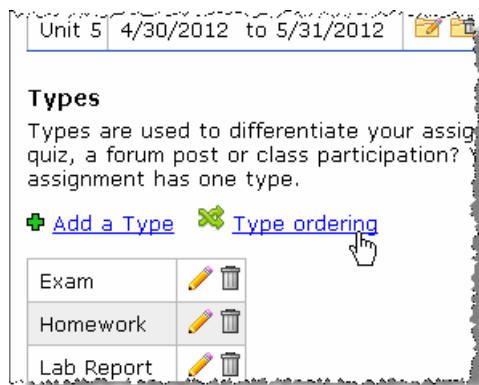
The system displays a screen titled **Ordering Your Types**.
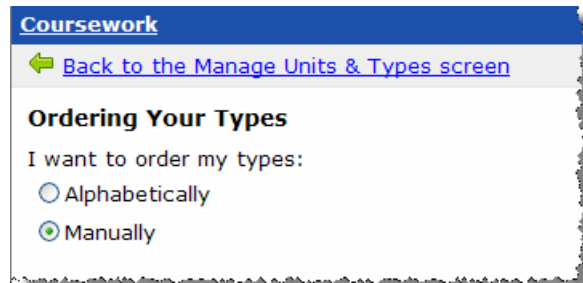
4   Select one of the following as appropriate:

- **Alphabetically**
- **Manually**

5   If you selected **Manually**, the screen updates to let you drag and drop the types. In this case, drag the types into the appropriate order. (To select any type, click the corresponding black arrows.)

6   When finished, click **Done reordering**.

Deleting a type

Use this procedure to delete a type.

To delete a type:

1 Navigate to the appropriate Coursework portlet instance, as described in page 43.

2 Click **Manage Units & Types**.

The system displays a screen showing several settings.

3 Locate the type you want to delete and click the corresponding trash-barrel icon.

The system does one of the following:

- If you currently have assignments of this type, a pop-up is displayed that lets you reclassify the assignments as another type, or choose to delete them.
- If the type is currently not used, the system displays a dialog asking whether you are sure you want to delete the type.

4 If there are assignments of this type, choose the appropriate option for dealing with them.

5 Click **Delete type**.

The system removes the type.

Configuring the portlet

By default, the Coursework portlet is configured to group assignments by unit rather than by type. That is, each unit is a heading, and the unit's assignments are listed below it, ordered according to their due dates.

However, you can change this — you can choose to group assignments by type rather than by unit, and you can also change the way that assignments are ordered.

Note that these choices affect everyone's view of the portlet instance, not just your own view. Also, as soon as you make a selection, the system changes the view immediately. That is, you will not have an opportunity to cancel out of these changes (though you can change it right back, if necessary).

Changing the grouping method

The grouping method is the main organizational choice that affects how the portlet looks. Assignments can be grouped either by unit or by type.

If you have already chosen the grouping method you want to use, but need help ordering the individual units or types, see *or* *as appropriate.*

To change the grouping method:

1   Navigate to the appropriate Coursework portlet instance, as described in .

2   Click **Configuration**.

The system displays the **Configuration** screen, with messaging indicating how your assignments are currently grouped.
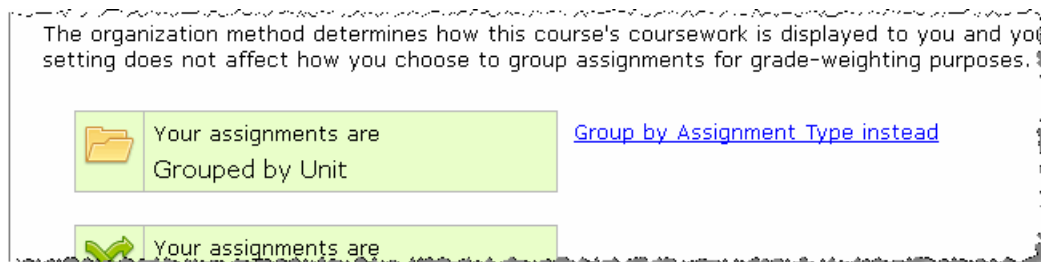
3   To change the current grouping method, click the link at the right, which will say one of the following:

- •   **Group by Assignment Type instead**
- •   **Group by Unit instead**

The system changes the grouping method.

At this point, you may want to change the way that units or types are ordered. For help doing this, see "Ordering units" on page 48 *or* "Ordering types" on page 53.

Changing the ordering method

On the main Coursework screen, either units or types are used as headings (as described on page 56). Under each heading, you can order assignments by any one of the following criteria:

- •   **by due date (oldest first)** — Assignments that are due earlier are listed first. This is the default.

- •   **by due date (newest first)** — Assignments that are due later are listed first.

- •   **by unit** — Assignments are listed by unit, with units being presented in alphabetical order. (This option is available only if grouping is done by type.)

- •   **by type** — Assignments are listed by type, with the various types being presented in alphabetical order. (This option is available only if grouping is done by unit.)

- •   **by format** — Assignments are listed in the following order: basic, online, uploaded. If there is more than one assignment of any format, then within each format, items are ordered by due date, with the assignments due earliest listed first.

- •   **manually** — You manually arrange assignments using an **Order assignments** link that is added to the screen.

- •   **alphabetically** — Assignments are ordered alphabetically.

To change the ordering method:

1   If you haven't already, go to the appropriate Coursework portlet instance, as described in "Navigating to the Coursework portlet" on page 43.

2   Click **Configuration**.

The system displays the Configuration screen, which includes messaging that explains how assignments are currently ordered.
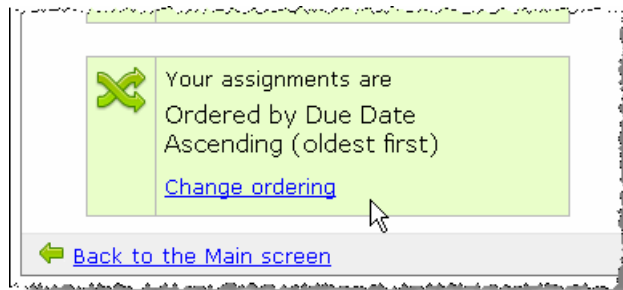
If you are currently ordering assignments manually, this box also includes a link labeled **Order assignments**.

3　Click **Change ordering**.

The system displays a pop-up that lists all the ordering methods. The method you are currently using is displayed in black — others are styled like hyperlinks.
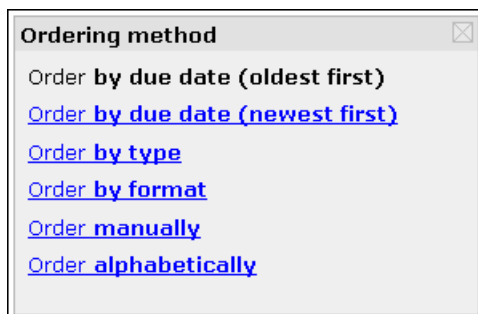
4　Select the ordering method you want to use.

The system changes the ordering method. If you selected anything but **Order manually**, you can stop now.

5　If you selected **Order manually**, the system adds a link that says **Order assignments**. Continue to "Ordering assignments manually" on page 58.

Ordering assignments manually

Use this procedure if you've decided to order assignments manually, as described in "Changing the ordering method" on page 57.

To order assignments manually:

1　If you haven't already, go to the appropriate Coursework portlet instance, as described in "Navigating to the Coursework portlet" on page 43, and click **Configuration**.

2   Click the **Order assignments** link.
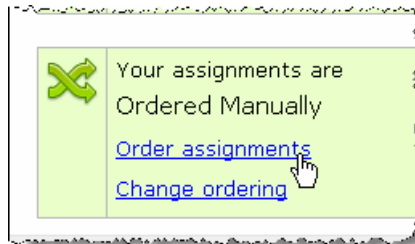
The system opens a screen that lets you manually arrange your assignments. At the top of the screen is a drop-down list that screen lets you select any of your units or any of your types (depending on the grouping method that you've chosen).

3   Use the drop-down list to select the unit or type whose assignments you want to order.
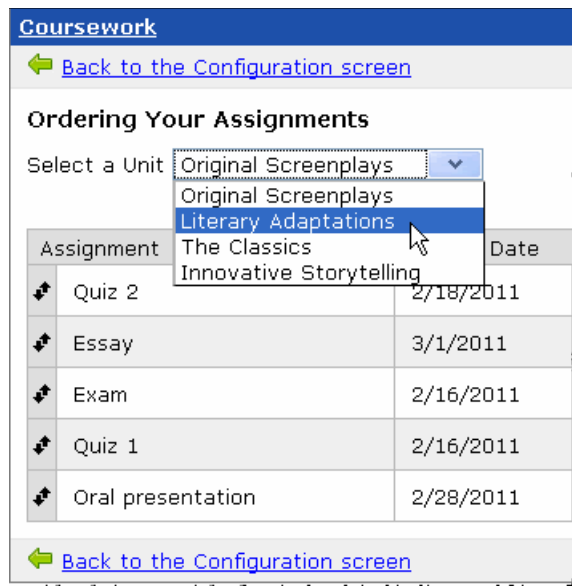
The system updates the screen to include the assignments associated with that unit or type.

4   Click and drag the units into the appropriate locations. (To select any unit, click the corresponding black arrows.)

5   Repeat steps 3 and 4 until you have ordered each unit and type as needed.

Managing permissions

By default, only members of the Administrators and Faculty roles have permission to create assignments, grade them, and so forth. If you have created a custom role — for example, a teaching assistant role — you may want to give its members permission to work with assignments and so forth. You have a few options in this regard.

Available permissions

Within the Coursework portlet, there are two permissions. Giving a role both these permissions essentially lets them do everything in the portlet except use the administrative tabs accessed using he wrench icon. To give a role more limited privileges, consider giving them just one of these permissions.

These permissions are not intended to be used by students in the course section (enrolled students and non-roster students). If you try to give a Coursework permission to one of these students, the permission will not be honored.

Can Grade Assignments

The **Can Grade Assignments** permission gives members of a role the ability to:

- Review completed assignments, grade questions, and adjust the overall grade for an assignment.

- Manage a student's interaction with the assignment by granting a retake, closing the assignment, leave feedback and so forth.

- View data about online tests using the Test Analysis feature.

This user's view of the portlet will include two buttons at the upper left — **Student List** and **View the Gradebook**.

Of these, the **Student List** functions as it would for a faculty member. However, **View the Gradebook** is useful only if the user also has permission to use the Gradebook. (For more on the available Gradebook permissions, see .)

In the main view of the portlet, this user will be able to see the **Recent submissions** list.

This user will also be able to click through an assignment and see the list of students, then click through to review each student's work and modify the student's grade.

Note that this user has full use of the controls on the Student Assignment Details screen, which allow for granting retakes, entering a personalized due date, reopening the assignment, leaving comments, and so forth.

Using the **More** menu, this user will also have the ability to preview the test.

Can Manage Content

The **Can Manage Content** permission gives members the ability to:

- Create, edit, and delete assignments.

- Create, edit, and delete units and types.

- View data about online tests using the Test Analysis feature.

When a user has this privilege, his or her view of the portlet includes three buttons in the upper left portion of the screen: **Add an Assignment**, **Manage Units & Types**, and **View the Gradebook**.

Of these, the **Add an Assignment** and **Manage Units & Types** buttons work as they would for a faculty member. However, **View the Gradebook** is useful only if the user also has permission to use the Gradebook. (For more on the available Gradebook permissions, see "Managing permissions" on page 280.)

In the main view of the portlet, this user will also be able to see edit icons for each assignment, and the **Edit due dates** link will be available.

Users who have this permission will *not* see the **Recent submissions** list. Also, this user's view of the assignment overview will not list individual students, and this user will not be able to grade assignments or review a student's work. However, the user will have access to several items in the **More** menu, including the ability to delete assignments.

Giving a role a permission

Use this procedure to give a role a permission in an instance of the Coursework portlet.

Make sure that you have also given the role permission to view the Coursework page. You do this through the Context Manager — for more details, see "Letting a role view pages and context links" on page 601.

> *Users who have Coursework permissions — but no other affiliation with the course — will not see the course section in their My Courses lists. These users should be instructed to bookmark the pages they'll need to access.*

To give a role permission:

1   Navigate to the appropriate Coursework portlet instance, as described on page 43.

2   Click the wrench icon.

The system displays the **Customize portlet Coursework** screen, with the **Preferences** tab selected.

3   Select the **Permissions** tab.

The system displays the **Permissions** screen.

4   Locate the role that needs a permission. In the **Operations** side of the screen, select the appropriate checkbox(es).

5   Scroll to the bottom of the screen and click **Save**.

2

About assignments

This chapter explains the various options available when you create and modify assignments.

In this chapter:

- Key concepts
- General assignment information
- Format-specific options
- Instructions and files

Key concepts

For every assignment you create, you have the option of defining values for several settings. These are divided into three categories:

- General assignment information
- Format-specific options
- Instructions and files

General assignment information

The general assignment options are the most basic ones you'll set for the assignment. They include:

- Name
- Unit
- Type
- Due date
- Open
- Grading
- Show grade

On the screen where you create or edit the assignment, the general assignment options show up under the **Step One** heading.
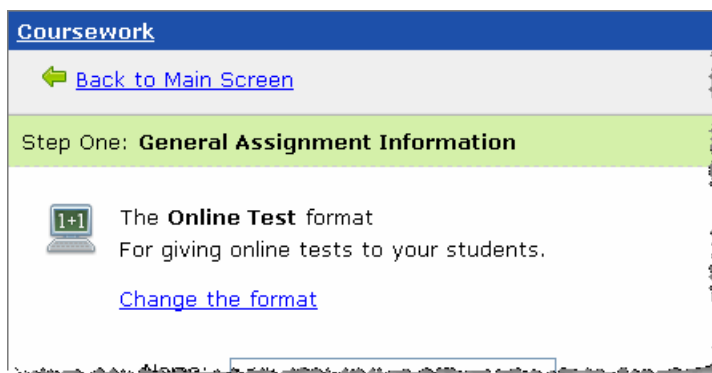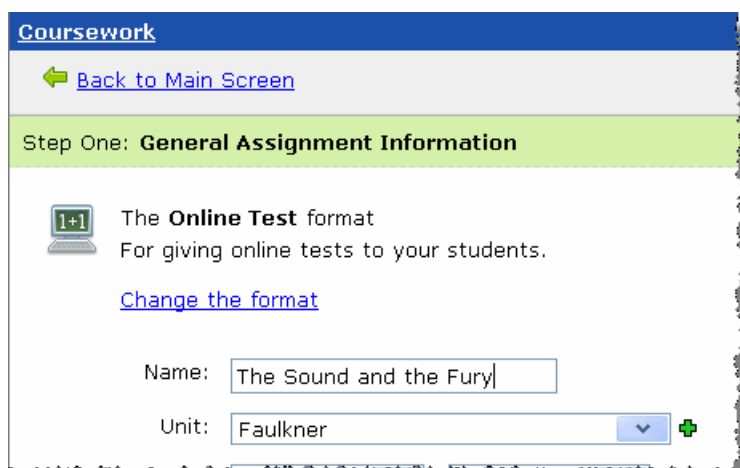
Note that with most of these options, you can pick values at the time you create the assignment, or you can go back and set them later.

Name

The name of the assignment is the main thing that identifies it, for both you and your students, so you should choose a name that is meaningful. The name must be unique within its unit.

This field is required — you will not be allowed to save the assignment until you enter a name.
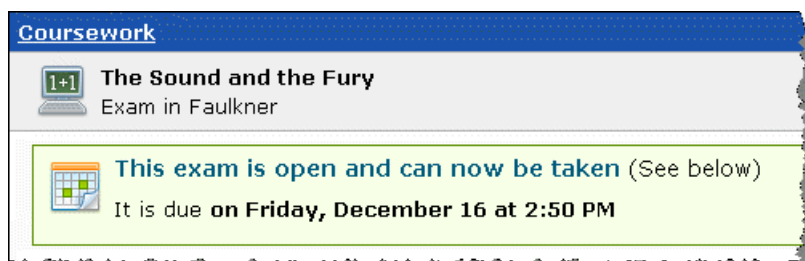
The student will see the name in the default view of the Coursework portlet instance (when the assignment becomes visible).

The name is also shown when the student clicks through to display details about the assignment.
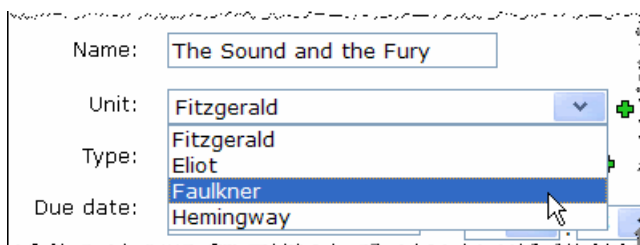
Additionally, the name is also shown on the assignment itself, and in automatically generated labels describing the assignment.

Unit
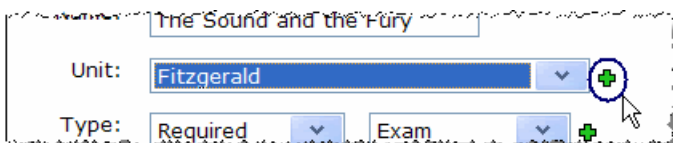
Every assignment must be associated with a unit. When creating or modifying an assignment, you select a unit using a drop-down list.

The **Unit** field is required, but if you don't actively make a selection, the system defaults to choosing the first unit in the list. (If you need help adjusting the order of the units in the list, see "Ordering units" on page 48.)
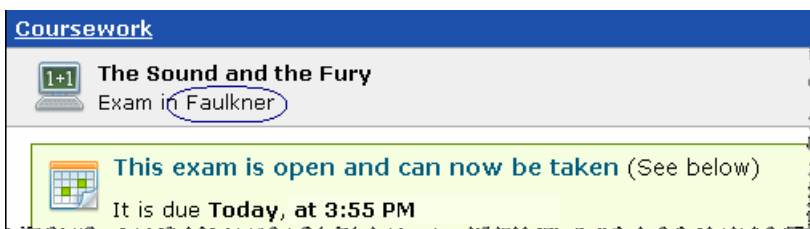
If you don't see a unit appropriate for the assignment, you can create a unit by clicking the green plus sign.

In response, the system displays a pop-up form, which you use out to create the unit. (If you need help with the form, see "Creating a unit" on page 46.)

The unit will be shown in several places, including when the student clicks through to see more details on the assignment.

It will also be displayed on the assignment itself.

Additionally, the unit is shown in automatically generated messages about the assignment.

For more details on units, see "Managing units" on page 44.

Type

Every assignment must be associated with a type. As part of specifying a type, you also make a selection regarding whether the assignment is required, optional, or extra credit. You make both choices using drop-down lists.
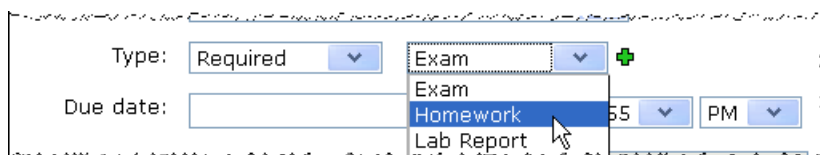
First drop-down list

The options in the first drop-down list are:

- **Required** — The assignment will be factored into Gradebook and will affect the student's course grade.

- **Extra credit** — The assignment will be factored into Gradebook but can only benefit the student.

- **Optional** — The assignment will not affect the student's grade.
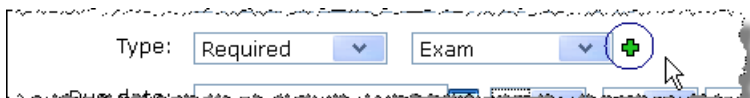
Second drop-down list

The second drop-down list allows you to actually select the type.

The **Type** field is required, but if you don't actively make a selection, the system defaults to choosing the first type in the list. (If you need help adjusting the order of the types in the list, see "Ordering types" on page 53.)

If you don't see a type appropriate for the assignment, you can create a type by clicking the green plus sign.

In response, the system displays a pop-up form, which you use to create the type. If you need help with the form, see "Creating a type" on page 52.

The type will be shown in several places, including when the student clicks through to see more details on the assignment.
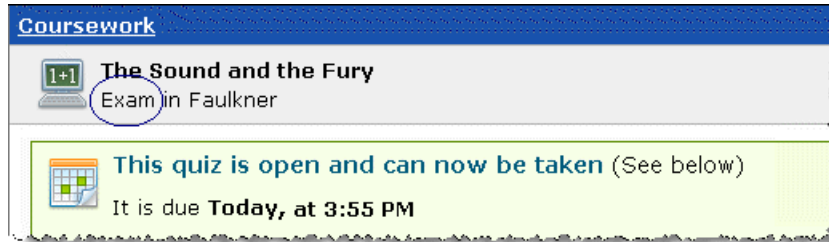
It will also be displayed on the assignment itself.

Additionally, the type is shown in automatically generated messages about the assignment.

For more details on types, see "Managing types" on page 51.

Due date

You use the **Due date** field to set the deadline for students to complete the assignment. This field is required — you will not be allowed to save the assignment until you enter a due date.
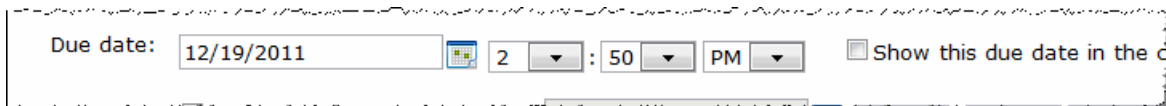
In general, the following actions automatically occur if a due date is reached and a student has not yet finished:

- For an online assignment, if the student has not yet submitted the assignment, the system gives the student a zero.

- For an uploaded assignment, if the student has not yet uploaded a file, the system automatically gives the student a zero. If the student has uploaded a file (or files) but failed to click the **Mark as Final** button, the system submits the file(s) on the student's behalf.

- If the assignment is a basic assignment, there are no automatic actions taken when the due date arrives.

You may also set up the assignment so that late submissions are allowed. If you do this, then these automatic actions will occur only when the deadline for late submissions is reached. For more details on late submissions, see page 72.
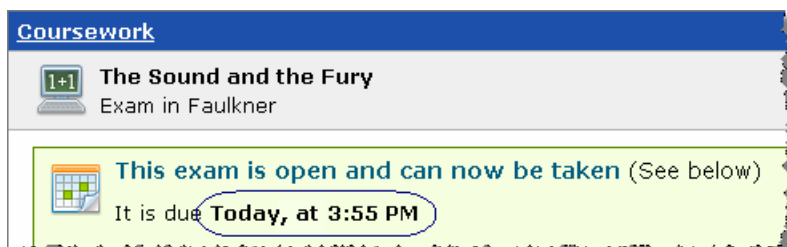
When you set the due date, you choose both a date and time. Note that if you use the calender icon to select a date, the system will automatically format the date correctly.

The due date is displayed for students in the list of assignments in the Coursework portlet instance.

The due date is also shown to students when they view the Student Assignment Details screen.

Adding the date to the calendar

If you want the due date to show up in the calendar for the course section, select the checkbox labeled **Show this due date in the course calendar**. For more details about course calendars, see Chapter 17, "Calendar."

Accepting late submissions

If appropriate, you can allow late submissions. When you do this, you fill out the following two fields:

- You must use the date and time fields to specify the latest you will accept late submissions. This is required.

- Optionally, you can use the remaining fields in this area to specific a penalty. This is either a percentage or a point value that should be deducted from the score of an assignment turned in late. This deduction can be taken off once, or for each day that the assignment is late.

If you are accepting late submissions, in the student view, once the due date passes, the assignment will be marked with a late icon.

If the assignment shows up in the **Due Next** area of the screen, the assignment will be marked as "Accepting late work" — although the actual cutoff date for late submissions is not shown.

When you configure the system to include a late-submissions date, then this is the date the system will look to for choosing when to automatically submit assignments for students who didn't complete them.

Extending a due date that has already passed

When the due date for an uploaded or an online assignment passes, generally the assignment automatically closes for all students. If you move the due date from the past to the future, this action alone will not make the assignment available again. The assignment must be also reopened for any students who should still be able to submit work.

For this reason, when you turn a past due date into a future due date and click **Save your assignment**, the system will present a pop-up asking whether you want to reopen the assignment for some or all students. The exact choices are:

- **Reopen for students who haven't** *taken the assignment / uploaded files* — This option reopens the assignment for all students who did not take the assignment at least once. For example, the assignment will *not* be reopened for a student who took the test one or more times, even if the student had additional attempts remaining.

- **Reopen for ALL students** — This reopens the assignment for all students. If this is an online test, and if any students already used all available attempts, this option also grants these student one retake each.

- **Don't reopen any student assignments** — This option does not reopen the test for any students. If you choose this option, then in practical terms extending the due date has no immediate effect. But you may want to choose this option if you plan to make other changes prior to making the test available again to students. (Later you will have to manually reopen the assignment for each student, as described on page 184.)

Note that this same pop-up also displays, with all of the same options, if you change the date for late submissions from a past date to a future date, or if you create a new late-submission date for an assignment whose due date is in the past.

Batch-editing due dates

If you want to edit all due dates for a single group of assignments on one screen, note that the main view of the Coursework portlet includes a link labeled **Edit due dates**. This link displays near the top of each group of assignments.

When you click **Edit due dates**, the system makes the due dates for all assignment editable, as well as the date for the unit (if assignments are grouped by unit). If a particular assignment is closed, the system will include a link for reopening the assignment.

Open

The **Open** setting determines whether or not an assignment is active. This is a required setting that defaults to **Later**.

When an assignment is open, or active, then all of the following are true:

- The assignment is visible in the student view of the portlet, and students can display a screen that lists details about the assignment (the Student Assignment Details screen). They can use this screen to leave comments for you, or read your comments for them.

- Also —

  - If the assignment is an online test, students can display and take the test.
  - If it is an uploaded assignment, students can upload their files and mark them as final.

When you create the assignment, you can accept the default choice of leaving the activation date undecided, or you can specify a date when the assignment will open. In some cases, you can choose **Now** to make it active immediately.

If you are working with an online assignment and have not yet added content using the Test Builder, the **Now** option will be grayed out. An online test cannot be opened until it has at least one question that is not flagged as extra credit, and until all questions have point values.

For assignments that are not yet active, you can optionally select the checkbox labeled **Display to students before it's open**. When you do this, the student will see the item listed in his or her view of the Coursework portlet and be able to display the Student Assignment Details screen, but they will not be able to submit work (and messaging will tell them that the assignment isn't open yet).

Note also that you can grant an individual student a personalized start date. When you do this, the assignment will open for that student on a different day than it does for the rest of the class. For details, see "Setting a personalized start date" on page 180.

Once an assignment is ready to be activated for the whole class, you can also open it from the main portlet view by clicking the lightswitch icon.

*An online test can also be activated from the main Test Builder screen — just click the **Activate Now** button.*
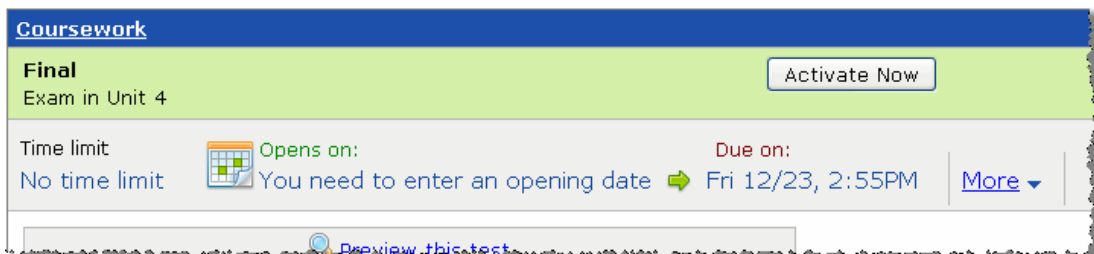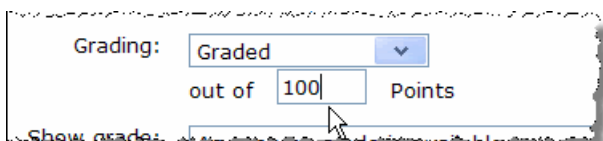
Grading

The **Grading** option is relevant only for basic and uploaded assignments — online assignments are always graded.

For basic and uploaded assignments, you can select from the following grading methods.
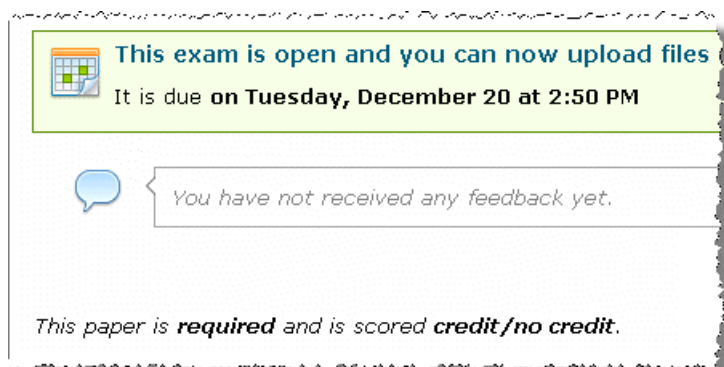
Option	Point value required?	Description	Factored into Gradebook?
Graded	Yes, you enter the point value on the screen where you create and edit the assignment, in the field directly below the **Grading** drop-down list.	Each student will get some number of points for the assignment, and a grade determined by the letter grade scale in the Gradebook portlet.	Yes, the result will be factored into Gradebook and affect the student's overall grade for the course section.
Credit / No Credit		Each student will either get *all* credit or no credit (all points or no points), similar to a pass/fail option.	
Not graded	No	There will be no grade and no indication of whether the student has completed the assignment.	No

You choose a grading method using a drop-down list. This list defaults to **Graded**.

If you choose **Graded** or **Credit/No Credit**, the screen includes a field for you to enter the total number of points that the assignment is worth.

Later, when the student clicks through to review details about the assignment, the portlet includes messaging that indicates whether the assignment is scored out of a certain number of points (**graded**), whether it is **not graded**, or whether it is **credit/no credit**. If the assignment is credit/no credit, the system does not display the number of points that the assignment is worth.

Show grade

The **Show grade** field lets you specify when students should be allowed to see the grade they got on the assignment. You can choose to show the grade at either of the following time:

- As soon as the grade is available.

- As soon as the grade is available and after the due date has passed.

You set this using a drop-down list.
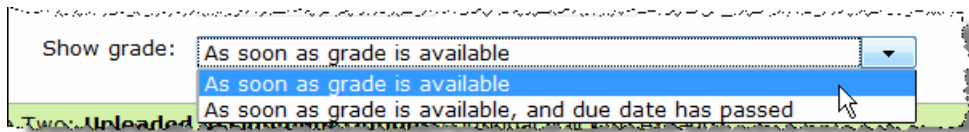
The **Show grade** value is not displayed for students.

Format-specific options
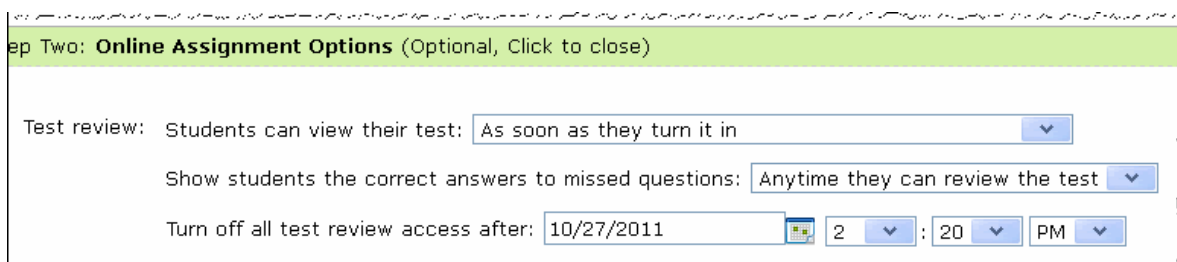
For every assignment you create, you have the ability to configure certain settings specific to the assignment's format (online, uploaded, or basic).

Online assignment options

The following settings are specific to online assignments.

Test review

This option lets you specify whether students can review their completed assignments, along with the correct answers. There are three components to this choice.

The first option determines whether students can view their completed tests, whether or not their responses were correct, and the scores they got on each question. You can choose to let students do this at any of the following times:

- As soon as they turn it in.

- As soon as it is fully graded.

- As soon as the due date passes.

- As soon as the due date passes AND it's fully graded.

- Never.

If you pick anything other than "Never," then the next two options become relevant.

The second option allows students to see the correct answers to any questions that they missed — otherwise they will just see whether they got the answer right or wrong. You can let students see the correct answers at any of the following times:

- Only after the due date.

- Anytime they can review the test.

- Never.

The third option lets you turn off review access after a certain date and time.

Time limit

The **Time limit** is the amount of time the student has to complete the test, starting from when the student clicks the link labeled **Start this** *test*.

When the time limit is reached, the test is automatically submitted, whether or not the student has completed it.

When setting this value, you can choose any number of hours, minutes, or days. The default choice is that there is no time limit.

The time limit will be displayed on the student's view of the Assignment Details screen, which offers a summary of the assignment.

Then, after the student begins the online assignment, the time limit is shown in the header on the screen. This view also includes an hourglass field that shows the current time remaining.

Once the student begins the assignment (by clicking the **Start the** *test* link), the header area keeps track of the time remaining. When the time limit ticks down to five minutes, the system generates a warning dialog that only five minutes remain, then begins counting down the seconds.

When the time limit is reached, the assignment is automatically submitted. This is true even if the student has navigated away from the page or logged out of the system.

Pagination

The **Pagination** setting determines whether and how the assignment is split into multiple pages. You can choose from any of the following pagination types:

- One section per page (this is the default).

- One question per page.

- Five questions per page.

- (None) all on one page.

You make this choice using a drop-down list.
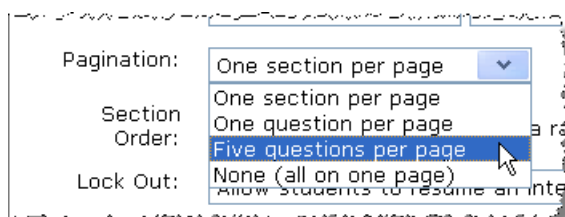
Section order

The **Section order** setting determines whether or not the sequence of sections will be shuffled for each student (meaning that different students will see a different order). The default choice is that sections are not shuffled.

You set this using a checkbox.
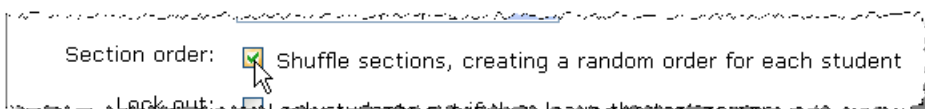
Lock out

The **Lock out** setting determines how the student's attempt is affected if interrupted by an incident such as a computer crash, or if the student navigates away from the test to another page. The default is that students are allowed to resume an interrupted attempt, which means they can re-display the assignment and start from the last place it was saved.

If you choose to lock students out, they cannot re-display the assignment, and the system will automatically submit the student's work when the time limit is reached or, if the assignment is not timed, when the due date arrives.

Extra credit

The **Extra credit** setting determines whether the system can give a student a better-than-perfect grade when automatically scoring the test. The default is that this is not allowed. What this means is that extra credit questions can raise the students' score only to a maximum of 100 percent.

Even without enabling this feature, you can always give a student a better-than-perfect score when manually grading the test.

You activate the **Extra credit** setting using a checkbox.
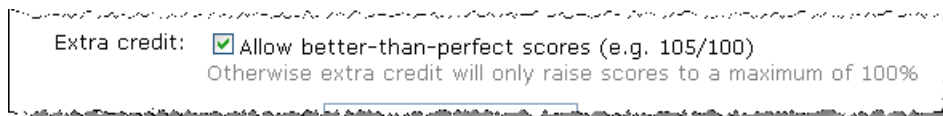
Security

Under **Security** label, you have a few choices.

Password

If desired, you can require students to enter a password before being allowed to open a test. This might be useful if you want to make sure the test is taken only by students who attend class on a particular day, when you distribute the password.

With this option, when students click the **Start the** *test* link, the system will display a pop-up that prompts them for a password. Any student who does not enter the correct password will not be allowed to proceed.

If a student begins the test, navigates away, and then returns, the student will be prompted to enter the password again before being allowed to resume work.

Requiring the e-Racer Locked Browser

When you require students to use the e-Racer Locked Browser, they are not allowed to use any other applications on their system, such as e-mail and instant messaging. They cannot take screenshots, copy, paste, print, or view other web sites.

You have two options for using the Locked Browser:

- **Require that students use the e-Racer Locked Browser for this test** — Students are redirected to the e-Racer Secure Browser when they click the **Start the** *test* link.

- **Also require the secure browser for reviewing a completed test** — Students who select the review link are redirected to the e-Racer Locked Browser.

In order for a student to use the Locked Browser, they must have downloaded the Locked Browser to their desktop. When you configure a test to require the Locked Browser, the student's view of the Student Assignment Details screen will show a link for downloading the installer. For this reason, the first time you set up an assignment to use the Locked Browser, you might want to make the assignment visible before it is active so that students have plenty of time to set up the browser. The browser is also available on Jenzabar's support web site ((http://www.myjenzabar.net/ics/), if you or an administrator wants to make the installer available at another location.
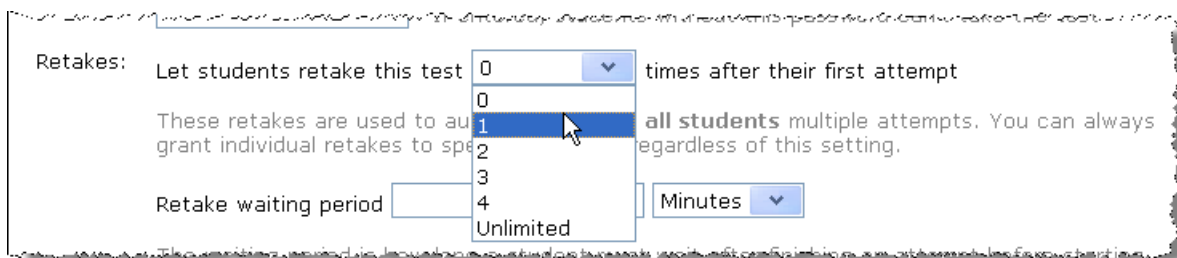
Prior to installing the locked browser, students should have already installed Internet Explorer (if they have a PC) or Safari (if they have a Mac), and they should have launched Internet Explorer or Safari at least once prior to installing the Locked Browser.

For more details on the locked browser, see .

Retakes

With the **Retakes** setting, you can allow students to take a test multiple times.

You make this choice using a drop-down list.

The options are:

- 0 (the default)
- 1
- 2
- 3
- 4
- unlimited

When you create retakes, you can also set values for each of the following:

- **Retake waiting period** — This is the minimum time that the student must wait between the end of one retake and the start of another. If you leave it blank, the student can turn in one attempt and immediately start the next.

- **Show in-progress grade updates** — If the test will be graded automatically, this lets the student see how their grade changes after each retake.

- **When taken more than one time, the final grade for this assignment should be** — This lets you choose to make the final grade the highest grade (of all retakes), the lowest, or the average. The default choice is the average of all grades.

If desired, you can also grant an individual student an additional retake, beyond those that other students get. For details on individual retakes, see .

After the assignment is closed, you can optionally customize how the final grade is determined for any particular student — for details, see .
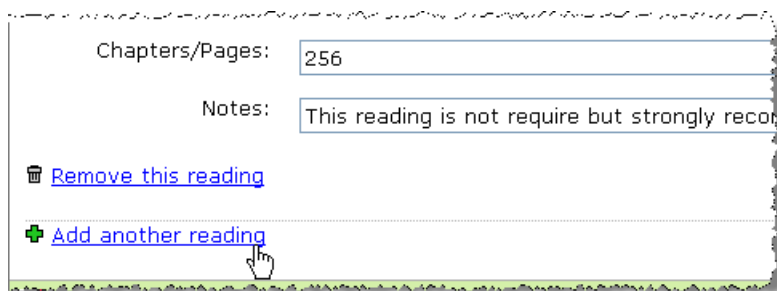
Basic assignment options

The basic assignment options are relevant only if you want to add a reading as part of the assignment.

You can add the following details about a reading:

- Title
- Author
- Edition/Issue
- Library/Bookstore link
- Chapters/Pages
- Notes

If you need to create more than one reading for the assignment, click the **Add another reading** link to add a second form to the page.
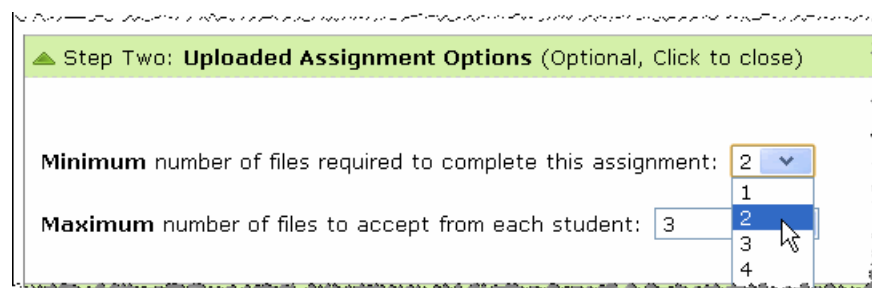
Similarly, if you need to remove a reading, click the **Remove this reading** link.

Uploaded assignment options

The uploaded assignment options determine how many files students should upload for the assignment. Specifically, you can specify:

- A minimum number of files that are required (choices are 1 to 5 — the default is 1).
- A maximum that will be accepted. (choices are 1 to 5 or unlimited — the default is unlimited).

You do this using a set of drop-down lists.

Instructions and files

For any assignment, you can optionally give students more context by adding a description, instructions, and one or more supplementary files.

Description

If you add a description, this text will be displayed as soon as the assignment becomes visible to students (either because it is active, or because you selected **Display to students while it's inactive**).

The description is shown in a few different places. First — students will see it in the main view of the portlet, along with the name of the assignment (for this reason, it may be a good idea to keep the description somewhat concise).
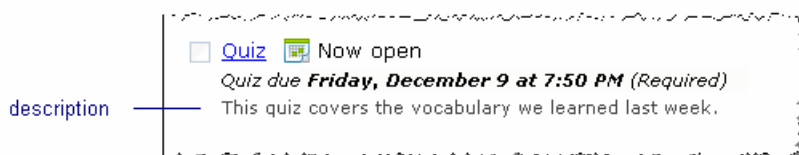
The description is also shown to students on the Student Assignment Details screen.
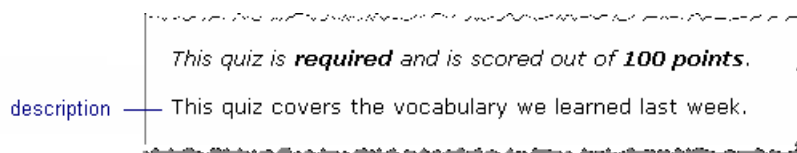
However, note that for an online test or an uploaded assignment, once the student has started taking the test or has uploaded a file, the description will be collapsed — so on future visits to the Student Assignment Details screen, the student will need to click an **Instructions** link to see the description, along with any instructions or files that you uploaded.
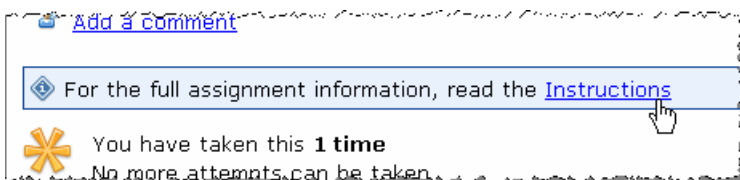
When creating or modifying the assignment definition, you enter the description using a rich text editor.
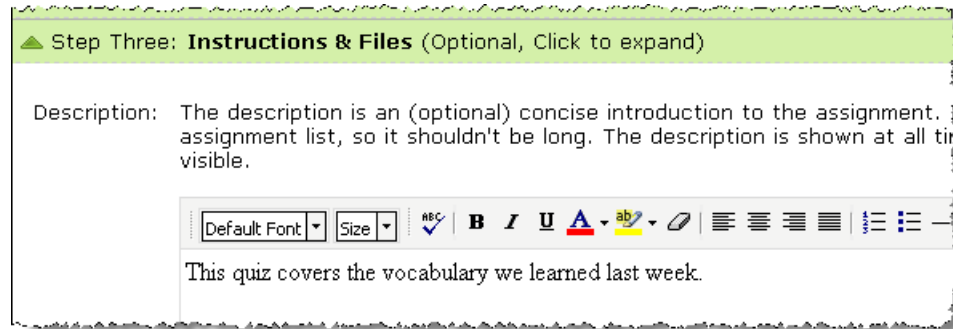
Instructions

Instructions are displayed to students *only* after the assignment has been made active (even if the assignment itself is set to be visible before then). Instructions are shown on the Student Assignment Details screen.

If you also included a description, the instructions are displayed right below the description.
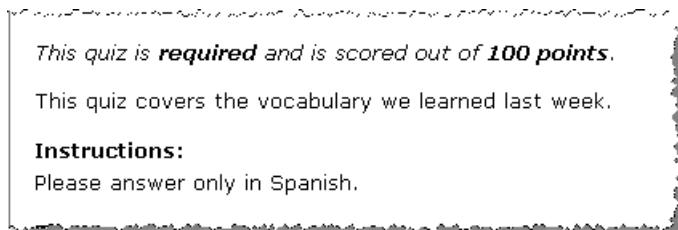
However, note that for an online test or an uploaded assignment, once the student has started taking the test or has uploaded a file, the instructions will be collapsed — so on future visits to the Student Assignment Details screen, the student will need to click an **Instructions** link to view the instructions, along with any description text or files that you uploaded.

You enter the instructions in a rich text editor.
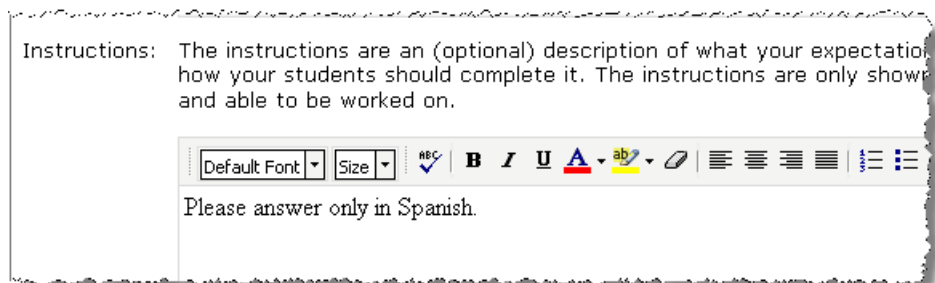
Files

You use the **Files** field to make an attachment available to students as soon as the assignment becomes active. Files are not displayed before the assignment becomes active, even if the assignment itself is set to be visible before then.

If you also included instructions, the attached file will display below the instructions.
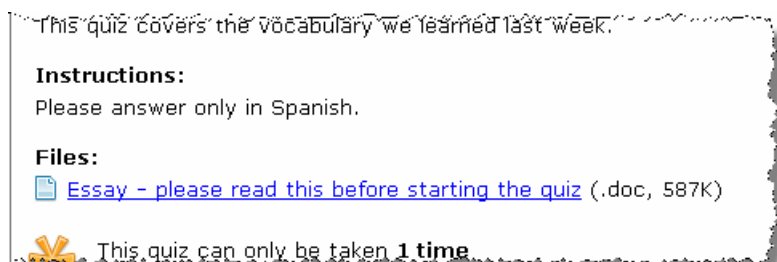
However, note that for an online test or an uploaded assignment, once the student has started taking the test or uploaded a file, the files will be collapsed — so on future visits to the Student Assignment Details screen, the student will need to click an **Instructions** link to view the files, along with any description or instructions that you created.

To upload a file, click the **Add a File** link and follow the prompts.

Note that you can give the file a label and a description, if desired.

3

Creating assignments

This chapter explains how to create an assignment. It also explains how to modify an assignment's settings or delete an assignment.

This chapter does not describe how to add content to an online assignment. For help with that process, see Chapter 4, "Adding content to online tests."

In this chapter:

- Adding an assignment
- Modifying an assignment
- Saving to the File Cabinet
- Deleting an assignment
- About the assignment detail screens

Adding an assignment

You have two options for adding an assignment:

- Creating an assignment
- Importing an assignment from the File Cabinet

Creating an assignment

If you want to create an assignment (by manually defining all of its settings), use this procedure.

To create an assignment:

1   Navigate to the appropriate Coursework portlet instance, as described on page 43.

2   In the pane at the upper left, click **Add an Assignment**.

A pop-up menu asks you to choose a format.

3 Select one of the options. (If you need help making a choice, see "Formats" on page 38.)

The system displays a screen with three sections:

- **Step One: General Assignment Information**. This is the area where you define the most basic settings. Note that the **Name** and **Due date** fields are required. If this is an uploaded or basic assignment, the **Points** field is also required. For details on all of these settings, see "General assignment information" on page 67.

- **Step Two:** *Format* **Assignment Options**. This area includes optional settings specific to the format of the assignment. For details on these, see any of the following:

  - "Online assignment options" on page 78.

  - "Basic assignment options" on page 83.

  - "Uploaded assignment options" on page 83.

- **Step Three: Instructions & Files**. These optional settings let you add a description, instructions, and supplementary files. For help with these, see "Instructions and files" on page 84.

4 Once you have filled out all of the fields that you want to complete, scroll to the bottom and click **Save your new assignment**.

The system creates your assignment. If this is an online assignment, the system opens the Test Builder, which you can use to create questions. For details on this process, see Chapter 4, "Adding content to online tests."

Importing an assignment from the File Cabinet

If you have saved assignments to your File Cabinet, you can import copies of these into any of your courses.

If you want to import an assignment from a course cartridge, that is a slightly different process — for details, see Chapter 33, "Importing from course cartridges."

To import one or more assignments from the File Cabinet:

1   Navigate to the appropriate Coursework portlet instance, as described in page 43.

2   In the pane at the upper left, click **Add an Assignment**.

The system displays a pop-up menu.

3   Click the link labeled **import an existing assignment**.
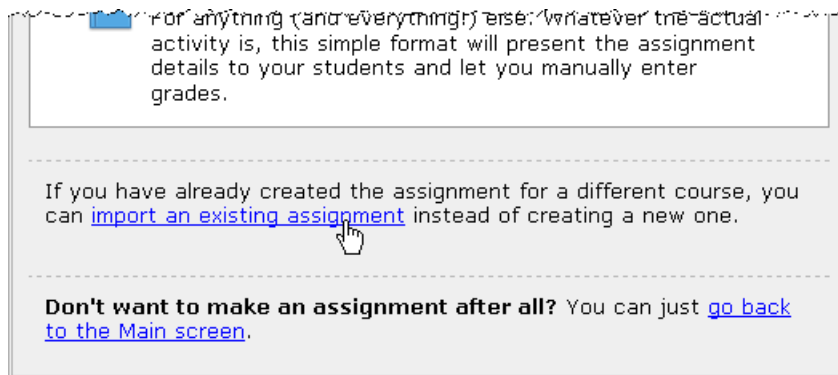
The system displays a screen that lets you browse your File Cabinet. Note that you can filter the list to show only online, only basic, or only uploaded assignments.

4 Using the checkboxes at the left, select the assignment(s) you want to import.

5 Click **Import Selected**.

The system displays a dialog stating that it imported the assignment(s). Note that by default, the imported assignments are not active and not immediately visible to students. They are automatically given a due date equal to the last day in the term.

6 Click **OK**.

Next you might want to do either of the following:

• Modify basic settings for the assignment, such as its name and its due date (for help with this, see "Modifying an assignment" on page 92).

• If this is an online assignment, you may want to modify its content (for help with this, see "Adding content to online tests" on page 101).

Modifying an assignment

You can use this procedure to change any aspect of an assignment except for the content of an online assignment (for help with that, see Chapter 4, "Adding content to online tests").

To modify an assignment:

1   Navigate to the appropriate Coursework portlet instance, as described on page 43.

2   Locate the assignment you want to modify and click the corresponding pencil icon.

3   The system displays a screen that lets you edit the assignment.

4   Make any changes necessary. For help with the fields on this screen, see the following:

   •   "General assignment information" on page 67
   •   "Format-specific options" on page 78
   •   "Instructions and files" on page 84

5   Click **Save**.

Saving to the File Cabinet

If you think you'll want to re-use some or all of an assignment, save it to the File Cabinet.

The system allows you to save the same assignment to the File Cabinet multiple times. You might want to do this if you end up making unexpected modifications to an assignment, and you want to save the revisions.

To save an assignment to the File Cabinet:

1   Navigate to the appropriate Coursework portlet instance, as described on .

2   Locate the assignment you want to save and click the name of it.

 The system displays the assignment overview.

3   At the upper right, click **More** to expand a menu with additional options.

4   In the **More** menu, click **Save to your File Cabinet**.

 The system displays a dialog stating the assignment was saved.

5   Click **OK**.

Deleting an assignment

When you delete an assignment, you also delete all students' grades for it. This cannot be undone.

To delete an assignment:

1 Navigate to the appropriate Coursework portlet instance, as described in .

2 Locate the assignment you want to delete and click the name of it.

The system displays the assignment overview.

3 At the upper right, click **More** to expand a menu with additional options.

4 In the expanded menu, click the link labeled **Delete this assignment**.

The system displays a dialog asking if you're sure you want to proceed.

5 Click **OK**.

About the assignment detail screens

Regardless of its format, each assignment you create has the following:

- An **assignment overview**, which summarizes details about the assignment and lists each student's name, as well as each student's grade, if one exists.

- A **Student Assignment Details** screen — one for each student. You get to this screen by navigating first to the assignment overview, then clicking the name of any student listed. The Student Assignment Details screen lets you leave feedback for the student, view the student's detailed history with the assignment, and take other actions.
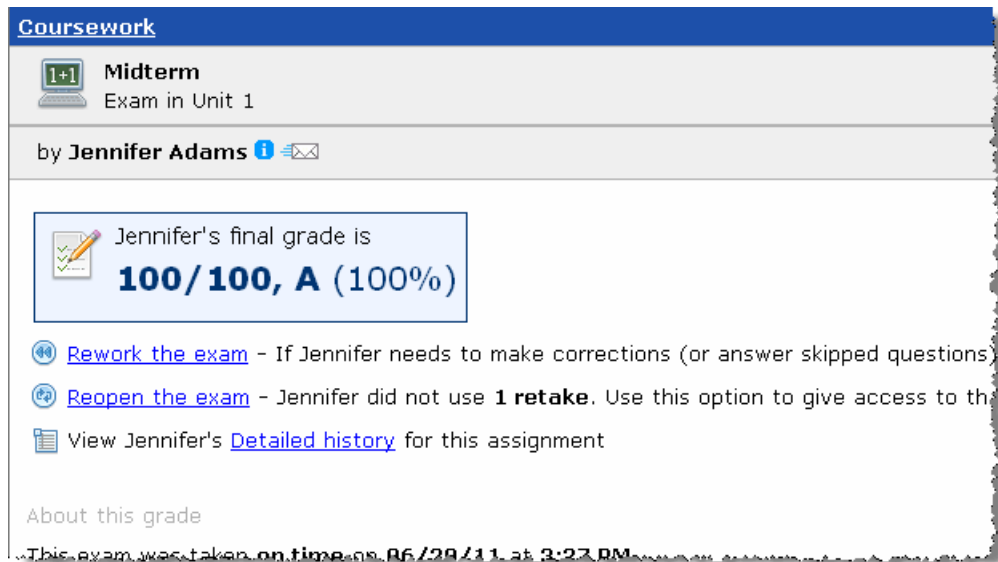
You use these two screens for a variety of tasks that are described throughout this guide. This section simply offers a quick overview of these screens.

The assignment overview

You might want to refer to the assignment overview in any of the following situations:

- For online and uploaded assignments, you can use this screen to see which students have completed the assignment.

- For uploaded and basic assignments, you can use this screen to enter students' grades, as described in Chapter 6, "Managing and grading assignments."

- For any assignment, you can use the assignment overview to navigate to other screens, such as the Student Assignment Details screen.

The assignment overview can be viewed only by faculty members and by roles that have the **Can Grade Assignments** or **Can Manage Content** permission.

Layout of the assignment overview

The exact contents of the assignment overview will vary depending on the format of the assignment, but all versions have the following:

- A header that includes details about the assignment — its name, its format, the unit it belongs to, and so forth.

- An action bar, which includes several useful links. The exact links will vary depending on the assignment's format and whether the due date has passed. If you're looking for a link in the action bar and do not see it, click the **More** link to display additional options.

- A **Student Results** area, which lists all students in the course section, along with each student's grade on the assignment (if one exists), and related details. For uploaded and basic assignments, you can enter grades here.
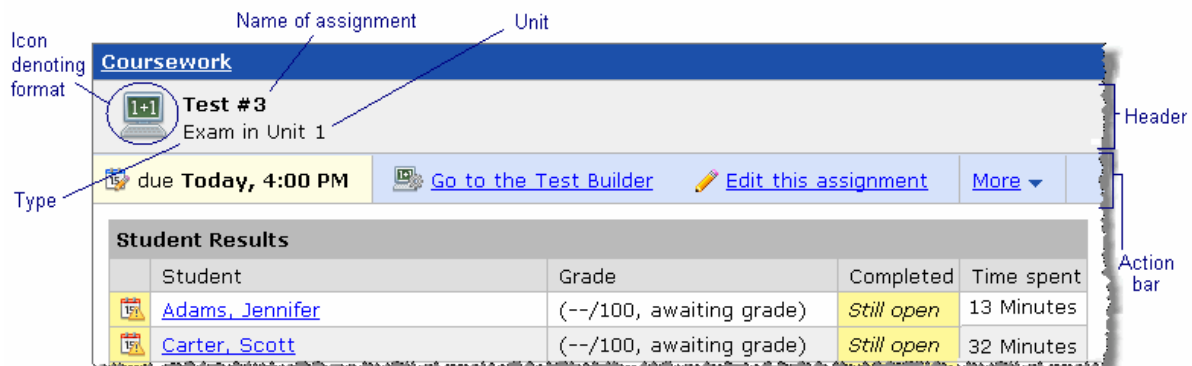
Navigating to the assignment overview

There are a few ways of navigating to the assignment overview.

To start from outside the Coursework portlet:

1   Navigate to the appropriate Coursework portlet instance, as described on .

2   Locate the assignment whose details you want to review. Click the name of the assignment.

The system displays the assignment overview screen.

To go *back* to the assignment overview from a lower-level screen:

If you are looking at another screen specific to the assignment — for example, if you are viewing the assignment in the Test Builder, or if you are on a Student Assignment Details screen — you can navigate back to the assignment overview by clicking a link in the upper left corner that says **Back to the assignment overview**. In many cases, you can display this link even if you don't see it at

first. For example, sometimes the text in the corner will just list the name of the assignment, along with its type and unit.
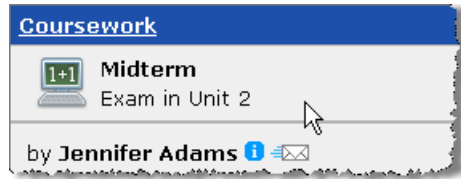
In this case, just move your cursor over whatever text is in this spot, and the text will change to a link.
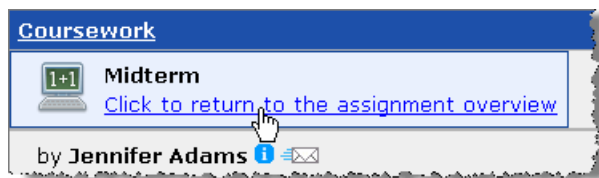
To navigate from one assignment overview to the next:

If desired, you can navigate from one assignment overview to the next using the **Previous** and **Next** links at the top right corner of the overview screen.
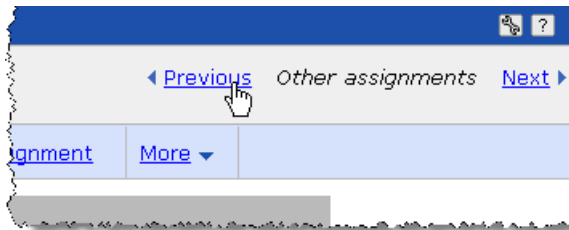
The Student Assignment Details screen

For every assignment, there is a screen you can use to manage each student's work. This is the Student Assignment Details screen. There are two versions of this screen — one shown to faculty and one shown to students.

Student version of screen

The student version of the Student Assignment Details lets them do the following:

- View details about the assignment, such as how many points the assignment is worth.

- View instructions for the assignment.

- Upload a file (if this is an uploaded assignment).

- Display and take a test (if this is an online assignment), and later review the completed test, if review is allowed.

- View feedback that you or other authorized users (such as a teaching assistant) have left.

- Enter comments for you to review.
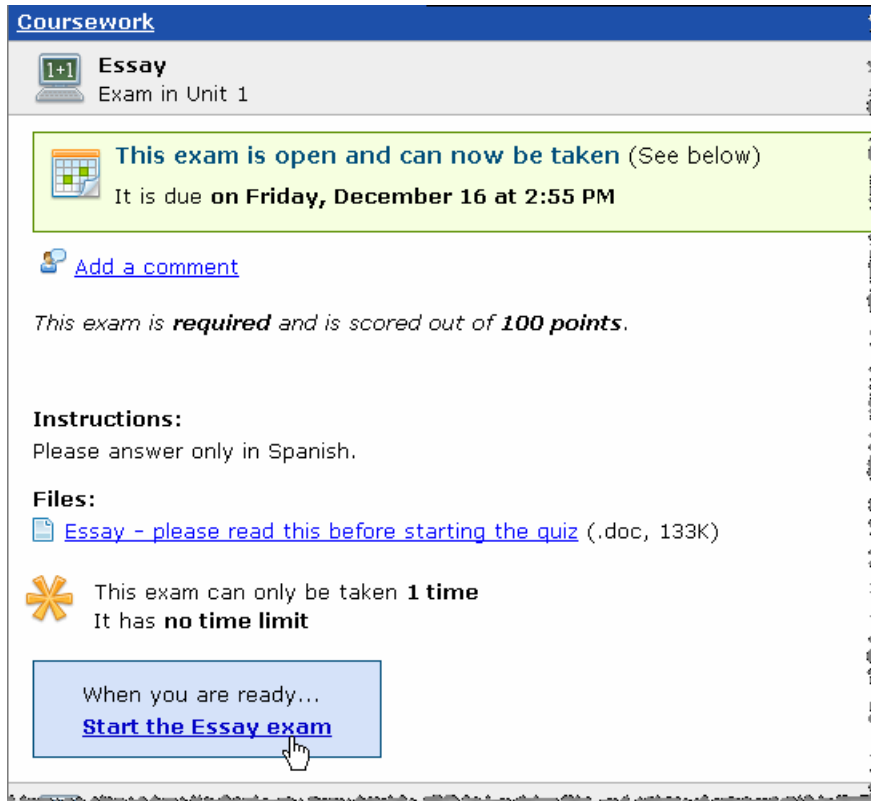
The Student Assignment Details screen is one of those which can be viewed in Student Emulation mode only in a generic sense — you can see what the screen looks like for an anonymous student who has not yet completed the assignment. You cannot preview what it looks like for a particular student.

Faculty view

The faculty view of the Student Assignment Details screen lets you complete the following tasks:

- Manage this student's experience with the assignment by taking actions such as giving the student a personalized time limit, granting the student a retake, and so forth.

- If this is an uploaded assignment, download a student's file(s).

- If this is an online test, review a student's answers, adjust any scores that were automatically given, and enter feedback for any question.

- Enter or adjust the student's grade for the student.

- Enter feedback for the students. You can enter comments, and you can also upload a file as part of the student's feedback.

- Review comments that the student left for you.
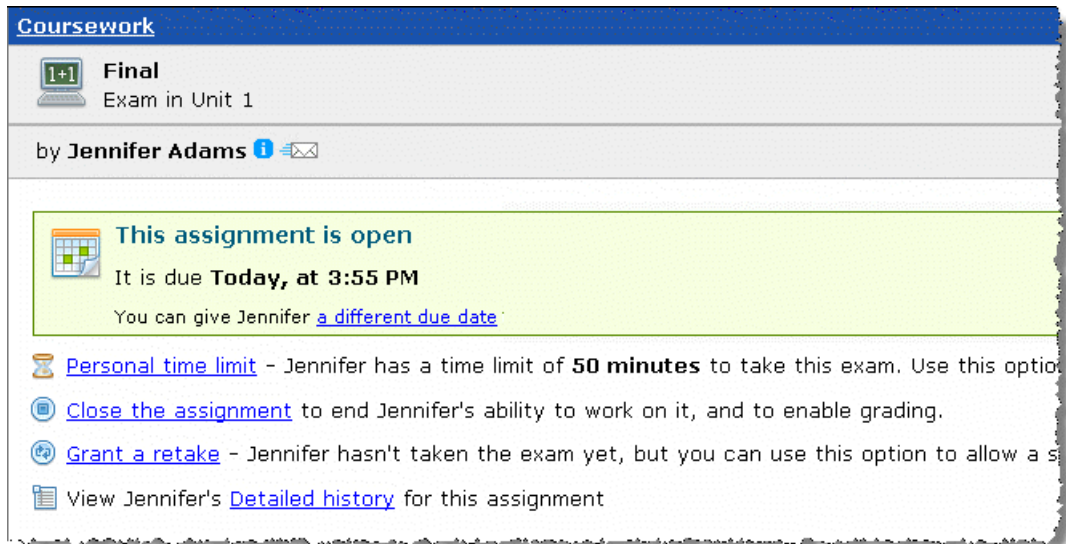
Navigating to the Student Assignment Details screen

There are a few ways of navigating to the assignment overview.

To navigate to the Students Assignment Details screen:

If you are looking at the assignment overview, just click the name of a student to view the Student Assignment Details screen for that person. (For help navigating to the assignment overview, see .)

To navigate from one Student Assignment Details screen to another student's screen:

If desired, you can navigate from one Student Assignment Details screen to the next using the **Previous** and **Next** links at the top right.
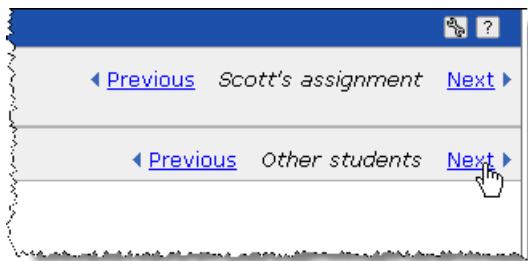
The links at the top let you move to Student Assignment Details screens for this student (but for different assignments).

The links at the bottom let you move to Student Assignment Details screens for other students (but for this same assignment).

Adding content to online tests

This chapter describes how to add questions and other content to online assignments.

In this chapter:

Key concepts

Before students can take an online test, you have to add questions to it. You do this using the Test Builder.

You can use Test Builder to do any of the following:

- Add **questions** to tests and, optionally, the correct answers, so the system can automatically score the assignment.

- Group questions into **sections**. You can optionally do either of the following:

  - Configure the section so that its questions are randomly shuffled.

  - Make the section a **question pool** — that is, configure the section to randomly display a subset of its questions.

- Assign a **point** value to each question.

- Set up **automatic feedback** that will display when students review their graded tests.

Opening an assignment in the Test Builder

After you create an online assignment, the system automatically displays the Test Builder. If you navigate away and need to go back later, use this procedure.

It is possible to open an assignment in Test Builder even if the assignment is already active and students have begun taking it. However, making major changes after students have begun taking a test is not recommended.

To open an assignment in the Test Builder:

1   Navigate to the appropriate Coursework portlet instance, as described on .

2   Click the name of the assignment.

The system displays the assignment overview.

If the test is active, the system may already list a grade for some students.

3 Click the link labeled **Go to the Test Builder**. (If the due date is in the future, this link will be in the action bar. If not, look in the **More** menu.)
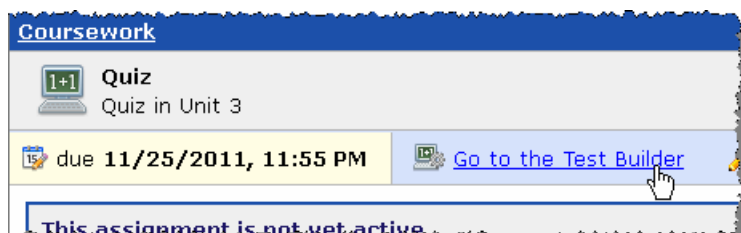
The system opens the Test Builder view of the assignment.

4 From here, you can do any of the following:

- Create and modify questions. (For more details, see "Working with questions" on page 113.)
- Change the point values of the test's questions (by clicking **Edit all points** — for more details, see "Point Value" on page 120).
- Create and modify sections. (For more details, see "Working with sections" on page 105.)
- Modify settings related to the assignment's sections, such as whether any sections will shuffle questions. (For more details, see "Modifying a section" on page 111.)

Working with sections
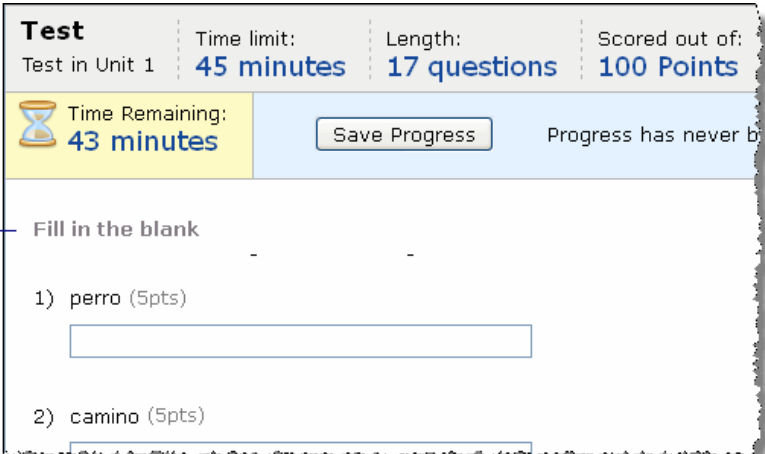
All online tests must have at least one section. A section is basically a collection of questions.

Attributes of a section

When you create or modify a section, you enter values for the following fields.

Section name

Each section must have a name. When a student displays the test, the section name is displayed as a heading over the section's questions. For this reason, you should choose a name that's meaningful.
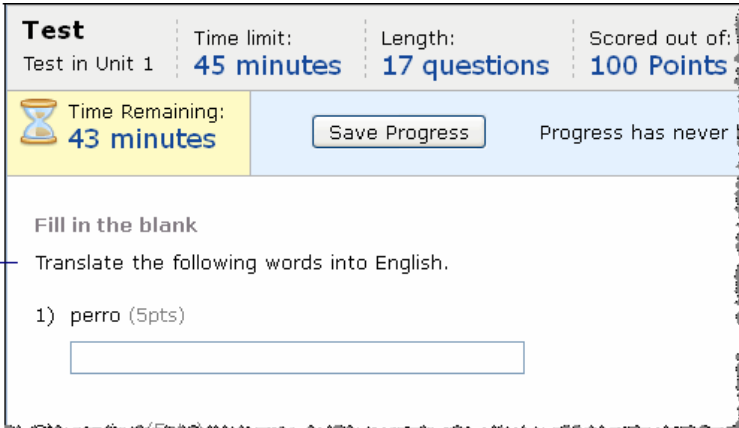
Instructions

The **Instructions** field is optional. If you decide to include section instructions, these will be displayed below the section name.
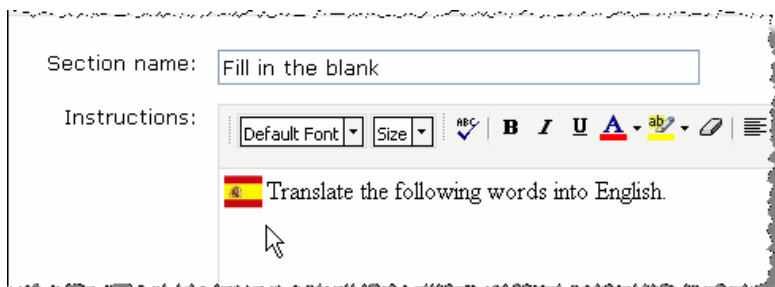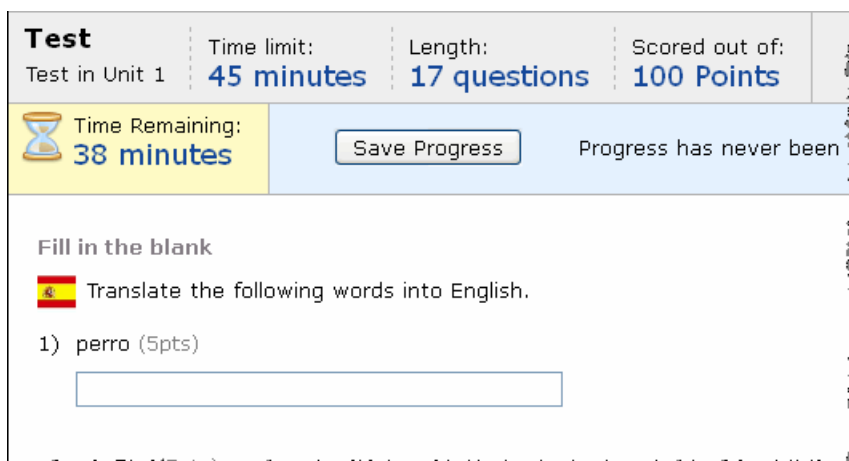
If appropriate, you can create equations or upload images, which you can add to the instruction text (or use instead of instruction text). To do this, click the **Add equation** link or the **Add Image(s)** button and follow the prompts.

You can leave the image or equation in a gallery that will display below the instructions text, or you can click and drag the image (or equation) into the rich text editor, where you can optionally resize it.

With this method, the image or equation will display alongside your instruction text.

Type

You use the **Type** filed to specify whether the section will display all its questions or just a random subset (making the section a question pool). Specifically, you choose one of the following:

- **Regular** — All questions will be displayed.

- **Pool** — A random subset of the section's questions will be displayed. If you choose this, you must also enter values for the following:

    - **Number of questions to give** — Note that if you choose a value greater than what the section contains, the system will simply display all the section's questions.
    - **Point value for each question** — Specify the point value of each question in the pool.

Within the Test Builder, the system will indicate whether or not the section is a question pool in a summary displayed under the section name.

True or False		✏ Edit	🗑 Delete
5 questions are given randomly from this **question pool**.			
Question	Type		Point value
➕ Add a **question**			
TF	True or False		5
TF2	True or False		5
TF3	True or False		5

Question order

The **Question order** field is presented only if the section is *not* a question pool. You can choose one of the following ordering methods:

- **Static** — Questions will display in the same order that you arrange them in the Test Builder.

- **Random** — Questions will be shuffled randomly for each student.

Within the Test Builder, a label under the section name indicates how questions will be ordered.

Fill in the blank		✏ Edit	🗑 Delete
All questions are given, in a random order.			
Question	Type		Point Value
➕ Add a **question**			
śapo	Short Answer		2

If you choose **Static**, the description includes a **Reorder** link.

Fill in the blank		✏ Edit	🗑 Delete
All questions are given, in the order shown below. Reorder			
Question	Type		Point Value
➕ Add a **question**			
śapo	Short Answer		2
lažã	Short Answer		2

Clicking **Reorder** lets you manually order the questions. For help working with this, see "Reordering questions within a section" on page 117.

Time limit

If desired, you can set a time limit for the section. The section time limit is shown to students when they begin the section, in a boxed message at the top of the page.

Once the time limit is reached, the system displays a dialog box stating tell the student that his or her work on the section has been automatically saved, but that no further work on the section is allowed.

If you previously saved a time limit for the section and you want to eliminate it, just clear the **Time limit** field and then save the section.

If you create a section time limit that exceeds the time limit you set for the assignment overall, the system will ignore the section time limit.

Similarly, if you set time limits for your sections that equal a smaller amount of time than the limit set for the test overall, then the overall time limit will be ignored.

Extra credit

If you want the section to be solely for extra credit, select the checkbox labeled **Make this section extra credit**. With this option, a student can earn points for the questions but will not be penalized for *missing* any of the questions. (The point value of this section's questions will not be added to the total possible for the test.)

If a section is extra credit, when the student displays the test, each question in the section will be clearly marked as extra credit.

In your view within Test Builder, the system will also include a reminder that the section is extra credit.

If you want the system to be able to give get a better-than-perfect grade when it is automatically scoring the assignment, see "Extra credit" on page 81. By default, better-than-perfect automatic scores are not allowed (though regardless of this setting, you can always manually give a student a better-than perfect score).

If you want to make the entire assignment extra credit (not just this section), see "Type" on page 70.

Adding sections

There are two ways to add a section:

- Creating a section
- Importing sections from the File Cabinet

Creating a section

Use this procedure to create a section.

To create a section:

1 Open the assignment in the Test Builder, as described on page 103.

2 Click the link labeled **Add Section**, which is near the top of the screen.

3 Enter a name for the section.

4 Enter values for any of the other fields, as appropriate. For help with these, see "Attributes of a section" on page 105.

5 Click **Save this section**.

Importing sections from the File Cabinet

If you have previously saved assignments to your File Cabinet, you may want to import one or more sections from those assignments. When you do this, you import both the section's settings and questions.

To import sections from your File Cabinet:

1 Locate the assignment to which you want to import questions. Open it in the Test Builder, as described on page 103.

2 Click the **More** link to expand a drop-down menu.

3 In the **More** menu, click **Import Question(s)**.

The system lists the assignments in your File Cabinet.

4 Click the name of the appropriate assignment.

The system lists its sections.

5 Use the checkboxes to select the section(s) you want to import.

6 Click **Import Selected**.

The system imports the selected section(s), along with each section's settings and questions.

Modifying a section

Use this procedure to modify a section.

To modify a section:

1 Open the assignment in the Test Builder, as described on page 103.

2 Locate the section you want to edit, and click the corresponding **Edit** icon.
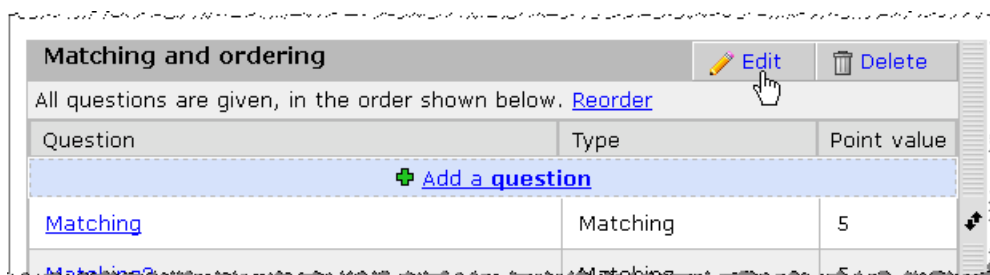
The system displays a form that lets you modify the section.

3 Modify any of the fields as appropriate. For details on any of the fields, see "Attributes of a section" on page 105.

4 Click **Save**.

Reordering sections

Use this procedure to reorder sections. Note that when you rearrange sections, the system saves your changes automatically — so you do not have to click a save button, and you also cannot cancel out of the changes.

To reorder sections:

1 Open the assignment in the Test Builder, as described on page 103.

Notice the pair of black arrows at the right side of each section.
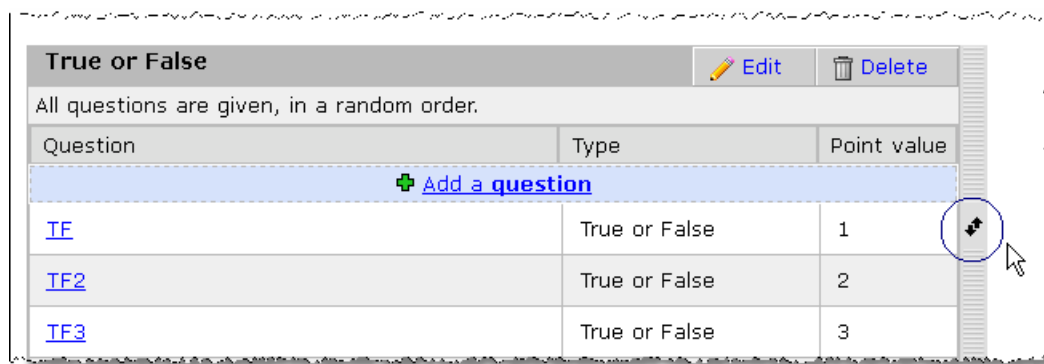
2   To move a section, clicking the corresponding black-arrow icon and drag the section to the appropriate location.

Deleting a section

When you delete a section, you also delete all of that section's questions.

To delete a section:

1   Open the assignment in the Test Builder, as described on .

2   Locate the section you want to delete, and click the corresponding **Delete** icon.
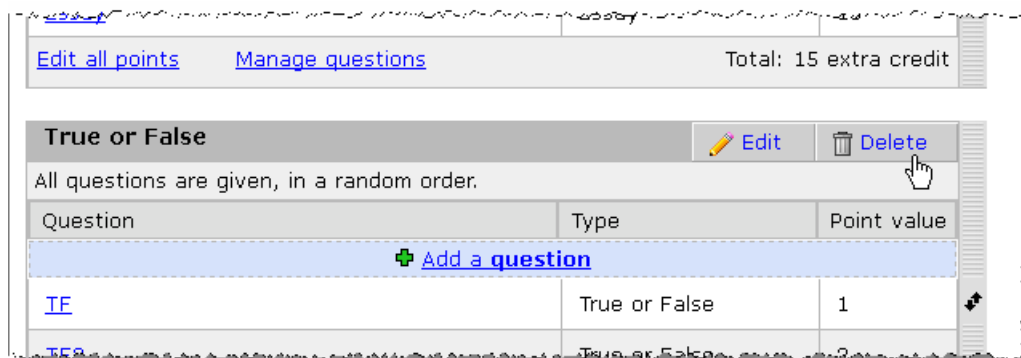
The system displays a dialog asking if you're sure you want to delete the section.

3   Click **OK**.

The system deletes the section.

Working with questions

This section explains how to add questions, move questions, and related tasks.

For details on any field related to questions, see "Using the question-design screen" on page 119.

Adding questions

There are two ways to add questions to an online assignment:

- Creating questions
- Importing questions from the File Cabinet

Creating questions

If you want to create a question, use this procedure.

To create a question:

1 Open the assignment in the Test Builder, as described on page 103.

2 Locate the appropriate section and click **Add a question**.
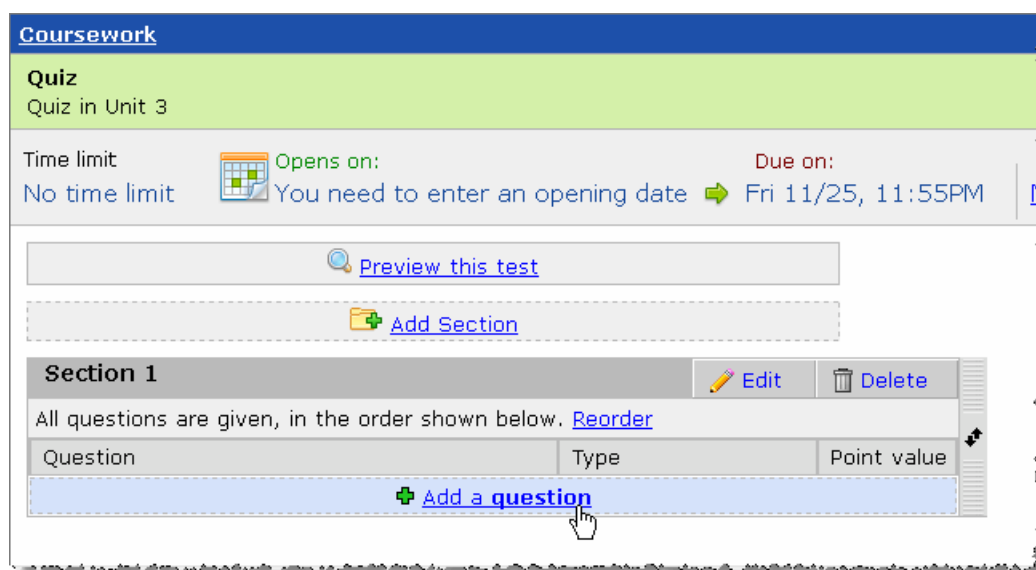
The system opens a screen that lets you design the question. At a minimum, you must fill in the following fields before you will be allowed to save the question:

- **Question Label**
- **Question Text**
- **Answer Type** (this defaults to **Multiple Choice**)
- Depending on the answer type you select, you may need to make additional selections in the **Design Your Answer(s)** area.

For further help with this screen, see "Using the question-design screen" on page 119.

3 If you want to preview the question, click **Preview Question**.

4 When you are done working with the question, click either **Save and add another** or **Save and return to Test Builder**.

Importing questions from the File Cabinet

If you have saved assignments to your File Cabinet, you may want to import one or more questions from those assignments.

To import questions from the File Cabinet:

1 Open the assignment in the Test Builder, as described on page 103.

2 Click **More** to expand a drop-down menu.
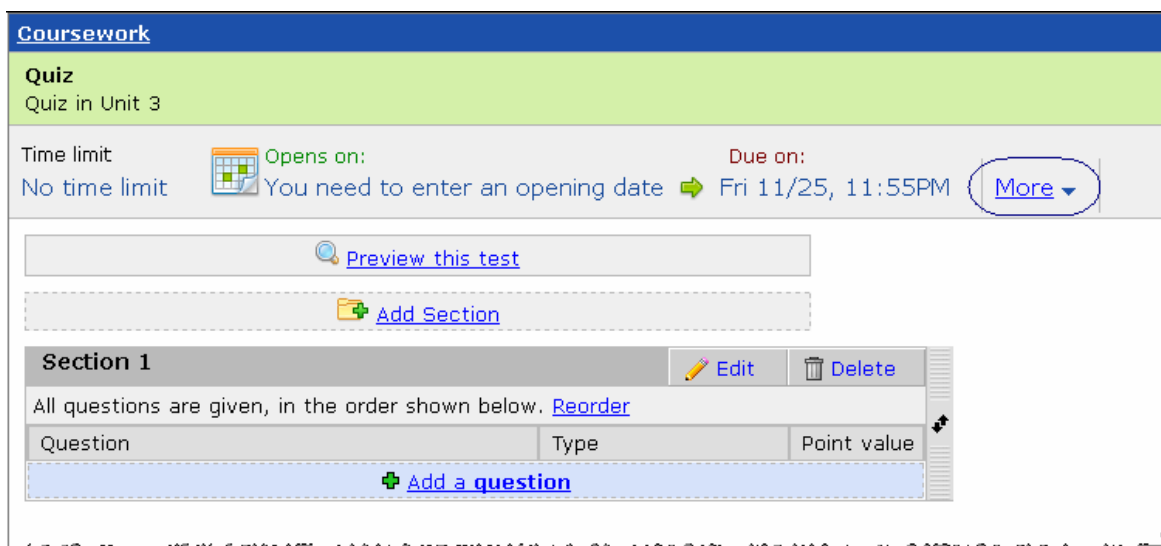
3 In the **More** menu, click **Import question(s)**.

The system lists the assignments stored in your File Cabinet.

4 Do one of the following:

- Find questions by browsing a particular assignment —

  a Click the name of the assignment to display a list of its sections.

  b Click the name of a section to a display a list of its questions. Note that you can click the name of any question to preview it.

c Use the checkboxes to select the questions you want to import.
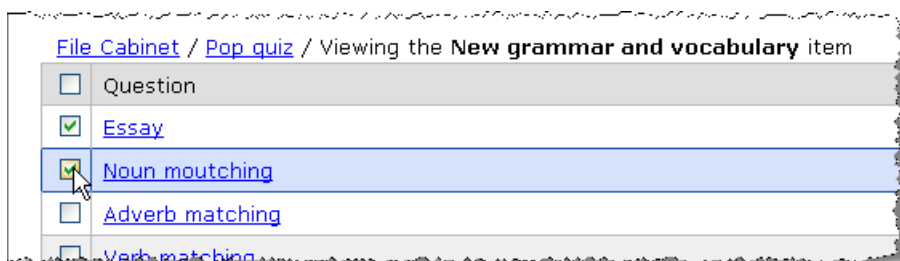
d Click **Import**.

• Search by keyword and/or question type —

a Click the link labeled **search for them**.

The system displays a form.

b Enter a keyword in the text field provided.

c If appropriate, select the checkbox labeled **Also search answer options**. Otherwise, you will be searching the question text only.

d If you want to restrict your search to a specify type of question, use the drop-down list to choose one.

e Click **Search**.

The system displays all the questions that match your criteria.

f Select the questions you want.

g Click **Import Selected**.

Opening a question for editing

After you create or import a question, you may want to make changes to it. Note that while you can make changes to most of a question's settings, you cannot change its answer type.

To open a question for editing:

1   Open the assignment in the Test Builder, as described on page 103.

2   Click the name of the question you want to edit.

The system opens the main question-design screen, which lets you modify the question and any options that will display for students. This screen is described in detail in "Using the question-design screen" on page 119.

Moving questions

After creating questions, you may want to move them or reorder them.

Moving a question to a different section

If desired, you can move questions from one section to another.

To move one or more questions to a different section:

1   Open the assignment in the Test Builder, as described on page 103.

2   Locate the section that contains the question(s) you want to move and click the corresponding **Manage questions** link.

The system updates the screen to include checkboxes and two drop-down lists.

3   Use the checkboxes to select the question(s) you want to move.

4   Leave the first drop-down list set to the default of **Move** and use the other list to choose the section that should host the question(s).

5   Click **Submit**.

The system moves the questions.

6   Click **Finish managing these questions**.

Reordering questions within a section

If a section is configured so that its questions will be presented in the same order as in the Test Builder, then you may want to reorder them.

Note that the system will not allow you to reorder questions if the section is set up to shuffle questions randomly for students.

To reorder questions within a section:

1   Open the assignment in the Test Builder, as described on page 103.

2   Locate the section that contains the question or questions you want to reorder and click the corresponding **Manage questions** link.

   The system updates the screen to include black arrows to the right of the questions. If you do not see this, that means the section is set up to display questions randomly and you cannot reorder them. (For help changing the setup of the section, see "Modifying a section" on page 111.)

3   To move a question, clicking the corresponding black-arrow icon and drag the question to the appropriate location.
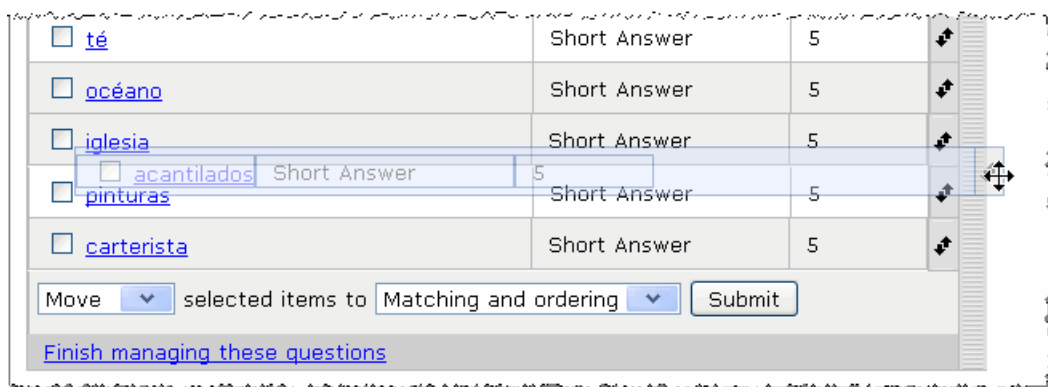
4   When done, click **Finish managing these questions**.

Previewing a question

Use this procedure to preview a question from within the Test Builder.

To preview a question:

1   Open the assignment in the Test Builder, as described on page 103.

2   Click the label of the question you want to preview.

3   Scroll to the bottom of the screen and click the **Preview Question** link.

Deleting questions

To delete one or more questions from a test, use this procedure.

To delete questions:

1 Open the assignment in the Test Builder, as described on .

2 Locate the section that contains the question(s) you want to delete and click the corresponding **Manage questions** link.

   The system updates the screen to include checkboxes and two drop-down lists.

3 Use the checkboxes at the left to select the question(s) you want to delete.

4 Set the first drop-down list to **Delete**.

5 Click **Submit**.

6 Click **Finish managing these questions**.

Using the question-design screen

This section describes the screen you use to create and modify questions. This screen is divided into three parts:
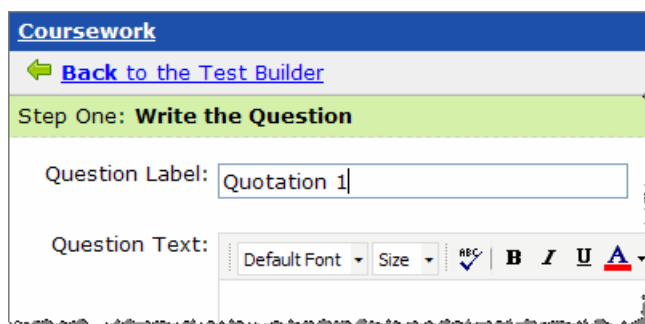
- Step One: Design the Question
- Step Two: Design the Answer(s)
- Step Three: Automatic Feedback

Step One: Design the Question

In the **Design the Question** area, you enter the text of the question and other basic details.

Question Label

The question label is used to identify the question within the Test Builder. It is not shown to students. If you do not enter a label, the system will generate a label based on the question text.
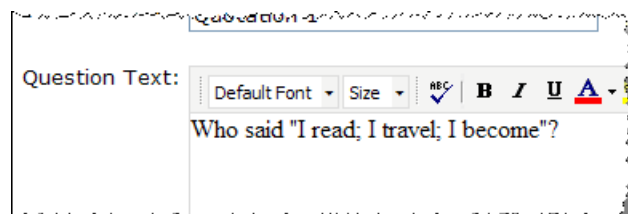
Question Text

You use the **Question Text** field to create the question that will be shown to students. This field is required. It can include any combination of the following:

- **Text** — You input this using the rich-text editor.

- One or more images — To input images, use the **Add Image(s)** button.
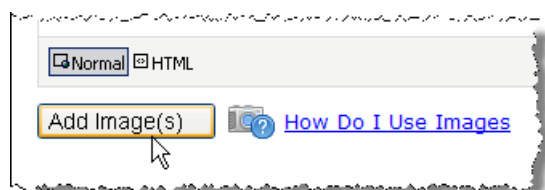
- An equation — To add an equation, use the **Add equation** link to open a LaTeX-format Equation Editor.

You can leave your images and equations in a gallery that will be displayed below any text you've entered, or you can drag them into the rich-text editor to resize them and arrange them alongside your text.

If you need additional help with images, click the link labeled **How Do I Use Images**. If you need help with the Equation Editor, note that after you open it, you can display instructions using the link labeled **Show help text**.

*If you want students to **answer** using the Equation Editor, make sure you select "equation" as this question's answer type. For more on answer types, see* "Step Two: Design the Answer(s)" on page 122.

Point Value

If you want to assign a point value to a question, enter it in the **Point Value** field.
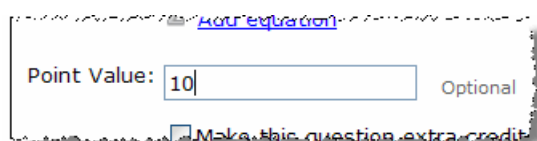
Eventually, every question must have a point value before you will be allowed to activate the assignment — but you don't have to enter the value now.

If you do not see a **Point Value** field, that means that this question belongs to a question pool — all questions in the pool must have the same value, and you can set this when you edit the section. (This is described in "Type" on page 106.)

Make this question extra credit

If you want the question to be one that can only benefit the student, click the checkbox labeled **Make this question extra credit**.

When you do this, the point value for the question is not added to the total for the test. This means the student will not be penalized for skipping or missing the question.

To help you keep track of which questions you have designated as extra credit, the system adds an extra-credit icon next to the corresponding questions in the main Test Builder view. It also makes a notation about the section's total extra-credit point value.

When they take the test, students will be able to easily see which questions are extra credit.
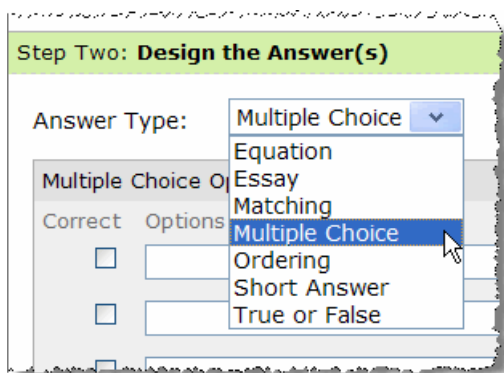
Step Two: Design the Answer(s)

In the **Design the Answer(s)** area, you select an answer type, which determines how students will submit their responses.

Answer Type

You choose the answer type using a drop-down list.

After you make a selection, the system updates the rest of the screen with details specific to your choice.

Once you save the question, you will not be allowed to change the answer type.

The various question types fall into two general categories:

- Types that can be graded automatically by the system.

- Types that *cannot* be graded automatically.

For types that can be automatically graded, you have to fill in a bit more information after selecting the answer type.

The answer types are described in the following table.

Table 4-1. *Answer types*

Type	Response required from student	Will the question be automatically graded?
Equation	A mathematical answer submitted using a LaTeX-format Equation Editor.	No
Essay	A text response that can be lengthy.	No
Matching	The matching of items from one list with their counterparts in a second list.	Yes, see "Options for matching" on page 124.
Multiple Choice	Selection of one or more answers from a list of correct and incorrect choices.	Yes, see "Options for multiple choice" on page 131.
Ordering	Correct ordering of a list of items that have been presented randomly.	Yes, see "Options for ordering" on page 138.
Short Answer	A short text response.	Optionally, see "Options for short answer" on page 142.
True/False	Assessment of a statement (the Question Text) as true or false.	Yes, see "Options for true-or-false" on page 151.

Options for matching

When you select **Matching** as your answer type, the system updates the screen to include two columns — one labeled **Object** and one labeled **Correct Match**. You fill out these two columns with pairs of items that go together.

When the question is shown to students, items in the **Object** column are listed on the screen. Next to each object is a drop-down list that includes the **Correct Match** items in alphabetical order.

If appropriate, you can configure the drop-down list to include distractors — choices that do not go with any of the objects. To do this, enter incorrect choices in the fields labeled **Unmatched distractor**.

You also have the following options:

- You can configure items in the **Object** column to use images, equations, or rich text (or any combination of these). For details, see "Using images, equations, and rich text" on page 126.

- If you plan to allow students to review their completed tests, you may want to set up automatic feedback to display if the student makes a correct match or chooses a specific distractor. For details, see "Creating match/distractor feedback" on page 128.

- You can have the system randomize items in both lists, enable partial credit, and more, as described in "Other choices" on page 130.

Using images, equations, and rich text

If appropriate, you can make each object an image, an equation, rich text, or some combination of the three. You do this using a rich-text editor.

Note that if you follow these steps, and if you have already entered text in the **Object** field, your text will be lost. To make sure your text displays, enter it again using the Rich Text Option Editor (in step 3 below).

To use images, equations, or rich text in the Object column:

1   In the **Design the Answer(s)** area of the screen, locate the object you want to work. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the rich-text/camera icon.
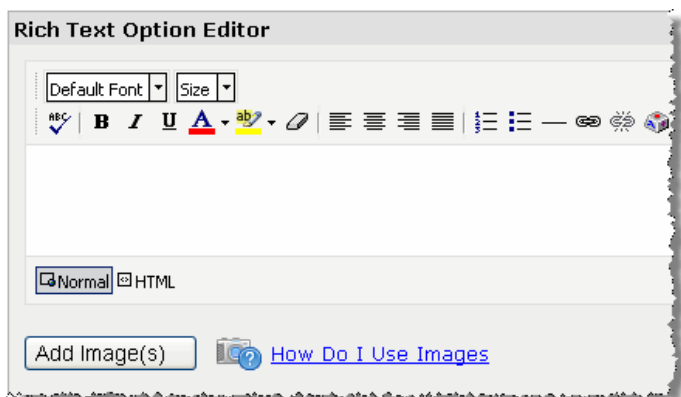
The Rich Text Option Editor opens.

3   Do any of the following as appropriate:

   •   Enter text in the text field.

   •   Select the **Add Image(s)** button and follow the prompts to upload an image file.

   •   Select the **Add equation** link to open the Equation Editor. Create your expression and click **Save your equation** to return to the Rich Text Option Editor.

Note that you can leave images and equations in a gallery that will display below the text, or you can drag them into the text field to display alongside any text you have added. (Once in the text field, images can be resized as needed.)

4   In the Rich Text Option Editor, click **Save**.

The editor closes, and your new material is displayed in the **Object** column. However, note that this item will not be saved until you save the question.

5   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Modifying or deleting images, equations, rich text

Use this procedure to modify or remove an object made up images, equations, or rich text. You can also use this procedure to remove the image, equation or rich text in the **Options** field, which might be desirable if you want to replace it with a plain-text value.

To modify an object made up of images, equations, or rich text:

1   In the **Design the Answer(s)** area of the screen, locate the object you want to change or remove. (For help getting to this screen, see .)

2   Click the corresponding **Edit this item** link.

The Rich Text Option Editor opens.

3   Do one of the following:

   •   To modify the option, make the appropriate changes and click **Save**.

- To delete the material, click **Clear this option**.
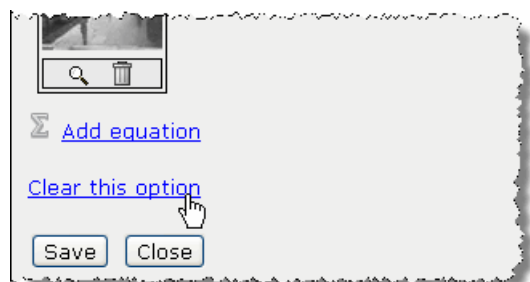
The system again displays the main question-editing screen, with your changes reflected. However, your changes will not be saved until you save the question.

4 If you deleted the item, do one of the following:

- Clear the corresponding text from the **Correct Match** column.
- Type something into the **Object** column to replace the rich text you deleted.

This is necessary because the system will not allow the question to be saved with an unmatched **Correct Match**.

5 If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Creating match/distractor feedback

You can set up automatic feedback for each of the following:

- A correct match — this feedback will be displayed only for students who match the item correctly.
- A distractor — this feedback will display if the student chooses that distractor.

Students will see match/distractor feedback only if you have set up the test so that they can review their completed work, as described in "Test review" on page 78.

You can also set up a more general type of feedback linked to this question. For details, see "Step Three: Automatic Feedback" on page 152.

To create automatic feedback for a correct match or a distractor:

1 In the **Design the Answer(s)** area of the screen, locate the item for which you want to add feedback. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2 Click the corresponding **Add feedback** link.

The system displays a pop-up editor.

3 Enter the comments you want to be displayed if the student matches this pair correctly or selects this distractor.

4 Click **Save**.

The pop-up editor closes. The system updates the balloon icon to include an ellipsis, and the link now reads **Edit feedback**.

However, note that your feedback will not be saved until you save the question.

5   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Modifying or deleting feedback

Use this produce to modify or remove feedback for a correct match or a distractor.

To modify or delete feedback from a match or distractor:

1   In the **Design the Answer(s)** area of the screen, locate the item for which you want to edit feedback. For help getting to this screen, see .)

2   Click the corresponding **Edit Feedback** link.

The system displays a pop-up editor.

3   Do one of the following:

•   If you want to modify the feedback, make the appropriate changes, then click **Save**.

•   If you want to delete the feedback, click **Clear this feedback**.

The system again displays your list of matching pairs. If you deleted feedback, note that the **Edit feedback** link has changed to an **Add feedback** link. However, your changes will not be saved until you save the question.

4   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Deleting a matching pair

Use this procedure if want to remove an object and its correct match, and any automatic feedback that you created to go with it.

To delete an object/correct match pair and its feedback:

1   In the **Design the Answer(s)** area of the screen, locate the pair you want to delete. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the red **x** to the right of the pair.

3   Save the question by clicking either **Save and add another** or **Save and return to Test Builder**.

Other choices

The checkboxes at the bottom of the form let you take advantage of a few additional features, which are described in the following table.

Table 4-2. *Additional features for matching questions*

Option	If you select this:	If you do not select this:
Randomize objects	For each student, the system scrambles the choices listed on the test (the objects).	Objects are listed in the order that you list them in the Test Builder.
Randomize matches	For each student, the system scrambles the choices displayed in the drop-down list (the correct matches and the distractors).	Correct matches and distractors are listed in alphabetical order.
Filter matches	The system displays a particular match or distractor only once, even if you entered it multiple times in the Test Builder.	The system shows each match and distractor the same number of times as you entered it in the Test Builder form.
Partial credit	The system automatically gives the student a number of points proportional to the objects the student matched correctly.	The student must match every object correctly in order to get any points.

After selecting any of these options, remember to save the question.

Options for multiple choice

With a multiple-choice question, you create options that students can choose from. You can designate multiple options as being correct, or just one.

Note that this form includes a few static options — **All of the above** and **None of the above**. You can select one or both of these to have them listed alongside the options you enter manually.

On the test, students will see each option listed next to a checkbox or radio button.

You also can do any of the following:

- Configure items in the **Options** column to use images, equations, or rich text (or any combination of these). For details, see "Using images, equations, and rich text" on page 132.

- If you plan to allow students to review their completed tests, you may want to set up automatic feedback that will display if a student chooses a specific option. For details, see "Creating feedback for an option" on page 133.

- Configure the question to automatically give students partial credit in certain circumstances, as described in "Working with partial credit" on page 136.

- Set up the question so that it will tell students how many correct options exist, as described in "Limiting selections" on page 137.

- Configure the question so the options will be presented randomly for each student, as described in "Randomizing options" on page 135.

Using images, equations, and rich text

If appropriate, you can make a multiple-choice option an image, an equation, rich text, or some combination of the three.

Note that if you follow these steps, and if you have already entered text in the **Options** field, your text will be lost. To make sure your text displays, enter it again using the Rich Text Option Editor (in step 3 below).

To use images, equations, or rich text in the Options column:

1   In the **Design the Answer(s)** area of the screen, locate the option you want to work with. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the corresponding rich-text/camera icon.

The Rich Text Option Editor opens.

3   Do any of the following as appropriate:

- Enter text in the text field.
- Select the **Add Image(s)** button and follow the prompts to upload an image file.
- Select the **Add equation** link to open the Equation Editor. Create your expression and click **Save your equation** to return to the Rich Text Option Editor.

Note that you can leave images and equations in a gallery that will display below the text, or you can drag them into the text field to display alongside any text you have added. (Once in the text field, images can be resized as needed.)

4   In the Rich Text Option Editor, click **Save**.

The editor closes, and your new material is displayed in the **Options** column. However, note that your changes will not be saved until you save the question.

5   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Modifying images, equations, rich text

Use this procedure to modify or remove an option made up images, equations, or rich text.

To modify an option made up of images, equations, or rich text:

1   In the **Design the Answer(s)** area of the screen, locate the option you want to change or remove. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the corresponding **Edit this item** link.

The Rich Text Option Editor opens.

3   Do one of the following:

- To modify the option, make the appropriate changes and click **Save**.
- To delete all of the material, click **Clear this option**.

The system again displays the main question-editing screen, with your changes reflected. However, your changes will not be saved until you save the question.

4   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Creating feedback for an option

For each option, you can enter feedback that will be displayed for the students if they chose that item. Students will see this feedback only if you have set up the test so that they can review their completed work, as described in "Test review" on page 78.

You can also set up a more general type of feedback linked to this question. For details, see "Step Three: Automatic Feedback" on page 152.

To create feedback for an option:

1   In the **Design the Answer(s)** area of the screen, locate the option for which you want to create automatic feedback. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the corresponding **Add feedback** link.

The system displays a pop-up editor.

3   Enter the comments that you want to be displayed if the student selects this option.

4   Click **Save**.

The pop-up editor closes. The system updates the balloon icon to include an ellipsis, and the link now reads **Edit feedback**. However, your feedback will not be saved until you save the question.

5   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Modifying or deleting feedback

Use this produce to modify or remove feedback for an option.

To modify or delete feedback for an option:

1   In the **Design the Answer(s)** area of the screen, locate the option for which you want to modify feedback. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the **Edit Feedback** link.

The system displays a pop-up text editor showing the saved feedback.

3   Do one of the following:

   •   If you want to modify the feedback, make the appropriate changes, then click **Save**.

   •   If you want to delete the feedback, click **Clear this feedback**.

The system again displays your list of options. If you deleted feedback, note that the **Edit feedback** link has changed to an **Add feedback** link. However, your changes will not be saved until you save the question.

4 If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Deleting an option

Use this procedure to remove a multiple-choice option. Note that when you do this, you also delete any feedback that you may have created for the option.

To delete an option and its feedback:

1 In the **Design the Answer(s)** area of the screen, locate the option you want to delete. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2 Do one of the following:

  • If this is an option you created, click the red **x** to the right of the option.

  • If this is a static option, de-select the corresponding **Include** checkbox.
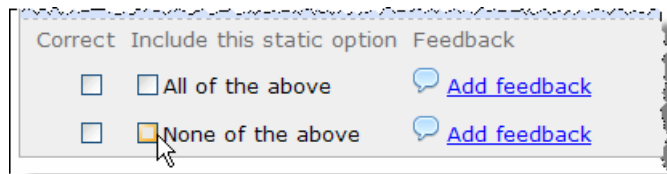
3 Save the question by clicking either **Save and add another** or **Save and return to Test Builder**.

An alternate way of deleting an option you manually added is to delete the text in the Option column and save the question.

Randomizing options

By default, the system will display multiple-choice options in the same order that you list them in the Test Builder. However, you can have the system scramble the options for each student if desired.

Note that the two static options — **All of the above** and **None of the above** — will always be listed last, if you are using them.

To activate or deactivate the 'randomize options' feature:

1   In the **Design the Answer(s)** area of the screen, scroll to the bottom of the screen and select or de-select the **Randomize** checkbox as appropriate. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   If you are done working with the question, click either **Save and add another** or **Save and return to Test Builder**.

Working with partial credit

For any multiple-choice question, you can activate partial credit, which lets the system automatically give students some points even if they don't answer the question perfectly.

With this option, the system will award partial credit in the following situations:

*   If the student selects some but not all correct options. For example, a student who selects only one of two correct choices will get 50% credit.

*   If the student selects all (or some) correct options but also a distractor.

*   If the student selects a particular distractor that you have configured to be worth a specific amount of partial credit.

Essentially, if you do *not* set up partial credit, the student must select all correct options and no incorrect options to get any credit for the question through the system's automatic scoring.

By contrast, with partial credit, the system will take the total number of correct responses the student made and divide it by the total number of selections the student made (unless the student made too few selections, in which case the system will divide by the total number of correct answers configured for the question). This value will be used to calculate the student's partial credit.

For example, suppose there is one correct option, and the student selects one correct response and one distractor: one correct choice divided by two total choices is 1/2 or .5, so the student will get 50% credit. For more examples of how these values are calculated, click **Help with Multiple Choice partial credit setting** on the **Design the Answer(s)** section of the screen.

To activate partial credit for a multiple-choice question:

1   In the **Design the Answer(s)** area of the screen, scroll to the bottom of the screen and select the **Partial Credit** checkbox. (For help getting to this screen, see "Opening a question for editing" on page 116.)

The screen updates to include a **Partial Credit** column. For each incorrect option, the **Partial Credit** column includes a field that you can use to enter a percentage.

2   If you want any particular distractor to be worth some amount of partial credit, enter the percentage in the field provided.

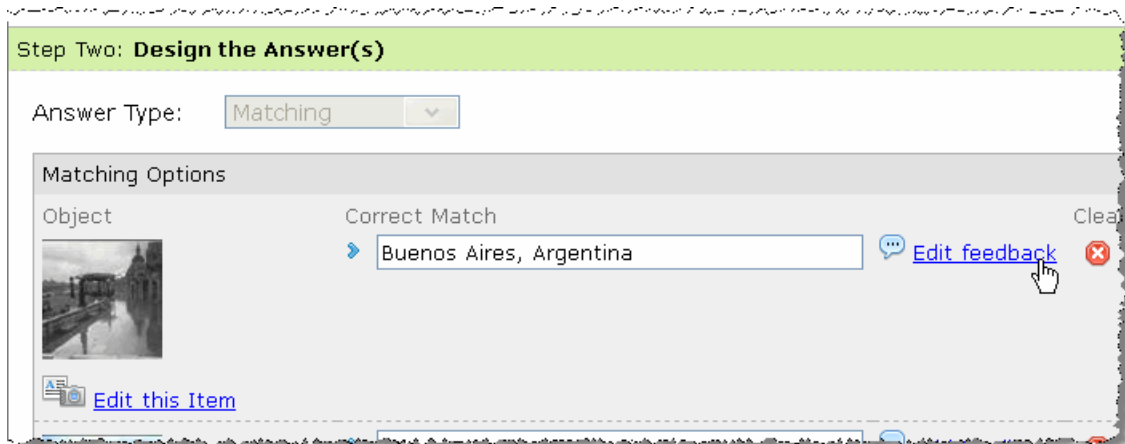Note that these values will not be saved until you save the question.

3   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Deactivating partial credit

To deactivate partial credit, simply de-select the **Partial Credit** checkbox, then save the question. Note that when you do this, any values you may have entered for distractors will be lost, so if you later decide to restore partial credit will have to manually add these back.

Limiting selections

If desired, you can have the system spell out for students how many correct options exist. To do this, you select the **Limit Selections** option.

With this feature, if the student selects too few or too many options, the system will display a pop-up error and prevent the student from submitting the test. The only exception is if the student does not make any selections at all (that is, if the student just tries to skip the question) — this is allowed.

If the **Limit Selections** feature is *not* selected, the test offers no indication of the number of correct options, and the system will allow the student to make any number of selections.

If you intend to use this feature, make sure students are instructed to configure their browsers to allow pop-ups.

To activate or deactivate the Limit Selections feature:

1   In the **Design the Answer(s)** area of the screen, scroll to the bottom of the screen and select or de-select the **Limit Selections** checkbox as appropriate. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   If you are done working with the question, click either **Save and add another** or **Save and return to Test Builder**.

Options for ordering

When you select **Ordering** as your answer type, the system updates the screen to include a form labeled **Ordering Items**. When you fill out this form, place your items in the correct order — the system will scramble the list for students.

You also have the following options:

- You can configure the content in the **Items** column to use images, equations, or rich text. For details, see "Using images, equations, and rich text" on page 139.

- If you plan to allow students to review their completed tests, you may want to set up automatic feedback to display next to certain items. For details, see "Modifying or deleting feedback" on page 140.

- You can set up the system to award partial credit if the student gets some of the order correct, but not all. For details, see "Working with partial credit" on page 141.

Using images, equations, and rich text

If appropriate, you can make a choice in the **Items** list an image, an equation, rich text, or some combination of the three.

Note that if you follow these steps, and if you have already entered text in the **Items** field, your text will be lost. To make sure your text displays, enter it again using the Rich Text Option Editor (in step 3 below).

To use images, equations, and rich text in the Items column:

1   In the **Design the Answer(s)** area of the screen, locate the item for which you want to add an image, equation, or rich text. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the corresponding rich-text/camera icon.

The Rich Text Option Editor opens.

3   Do any of the following as appropriate:

- Enter text in the text field.
- Select the **Add Image(s)** button and follow the prompts to upload an image file.
- Select the **Add equation** link to open the Equation Editor. Create your expression and click **Save your equation** to return to the Rich Text Option Editor.

Note that you can leave images and equations in a gallery that will display below the text, or you can drag them into the text field to display alongside any text you have added. (Once in the text field, images can be resized as needed.)

4   In the Rich Text Option Editor, click **Save**.

The editor closes, and your new rich text is displayed in the **Items** column. However, note that your item will not be saved until you save the question.

5   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Modifying images, equations, rich text

Use this procedure to modify an ordering item that uses images, equations, or rich text.

To modify an ordering item that uses images, equations, or rich text:

1   In the **Design the Answer(s)** area of the screen, locate the item you want to modify or remove. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the corresponding link labeled **Edit this item**.

    The Rich Text Option Editor opens.

3   Do one of the following:

    •   To modify the item, make the appropriate changes and click **Save**.

    •   To delete all of the material, click **Clear this option**.

    The system again displays the main question-editing screen, and you will see your changes in the **Items** column. However, your changes will not be saved until you save the question.

4   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Creating feedback for an item

If appropriate, you can create feedback for any ordering item. This feedback will be displayed next to the item *only* if the student orders this item correctly. Also, students will see this feedback only if you have set up the test so that they can review their completed work, as described in "Test review" on page 78.

If desired, you can set up a more general type of feedback linked to this question. For details, see "Step Three: Automatic Feedback" on page 152.

To create feedback to go with an ordering item:

1   In the **Design the Answer(s)** area of the screen, locate the item for which you want to add feedback. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the corresponding **Add feedback** link.

    The system displays a pop-up editor.

3   Enter the appropriate feedback (remember, it will be shown only if the student orders the item correctly).

4   Click **Save**.

    The pop-up editor closes, and the system updates the balloon icon to include an ellipsis, which indicates that you have added feedback. (However, note that your feedback is not truly saved until you save the question.) The system also changes the **Add feedback** link — it now says **Edit feedback**.
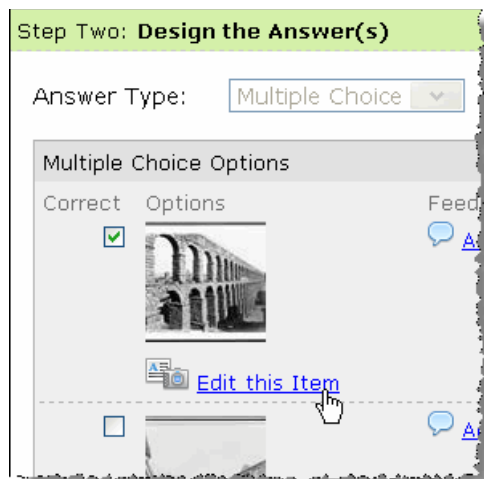
5   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.
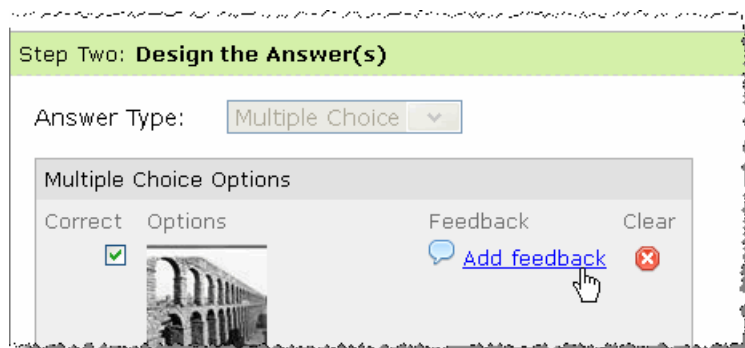
Modifying or deleting feedback

Use this produce to modify or remove feedback for an ordering item.

To modify or delete feedback:

1   In the **Design the Answer(s)** area of the screen, locate the item for which you want to modify feedback. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the **Edit Feedback** link.

The system displays a pop-up text editor showing the existing feedback.

3   Do one of the following:

•   If you want to modify the feedback, make the appropriate changes, then click **Save**.
•   If you want to delete the feedback, click **Clear this feedback**.

The system again displays your ordering items. If you deleted feedback, note that the **Edit feedback** link has changed to an **Add feedback** link. However, your changes will not be saved until you save the question.

4   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Deleting items

Use this procedure to remove a multiple-choice option. Note that when you do this, you also delete any feedback that you may have created for the option.

To delete an ordering item and its feedback:

1   In the **Design the Answer(s)** area of the screen, locate the item you want to delete. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the red **x** to the right of the item.

3   Save the question by clicking either **Save and add another** or **Save and return to Test Builder**.

An alternate way of deleting an ordering item is to delete the text in the Items column and save the question.

Working with partial credit

If appropriate, you can set up the question so that, when the test is automatically scored, the system will give the student a number of points proportional to the items the student ordered correctly. Otherwise, the student must order *all* items correctly in order to get any credit for the question.

To activate or deactivate partial credit:

1   In the **Design the Answer(s)** area of the screen, scroll to the bottom of the screen and locate the **Partial Credit** checkbox. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Select or de-select the checkbox as appropriate.

3   Scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Options for short answer

When you choose **Short Answer** as your answer type, the system updates the screen to include a gray box labeled **Answer Field**.

If desired, you can use this screen to:

- Place additional answer fields on the test. That is, by default, when you create a short-answer question, the system will display only one field on the test for the student to fill in. However, you might have a question that requires two or more answers. (For example: "Name a.} the 41st U.S. president and b.} the year that he took office.") For such questions, you create an additional answer field. When you do this, your own view of the Test Builder is updated to include a second gray **Answer Field** box on the screen. For more details, see "Creating additional answer fields" on page 143.

- Set up automatic scoring for any of your answer fields. To do this, you enter one or more acceptable responses in any **Answer Field** box. When you do this, the system will automatically give the student full or partial credit for matching this response. If you do not enter any responses for automatic scoring, then all student responses will be flagged for manual grading. For more details, see "Setting up automatic scoring" on page 143.

Creating additional answer fields

If you want to ask a multi-part question, you should configure the question to provide the student with multiple answer fields. When you do this, the first answer field will be labeled **"a,"** the second will be labeled "**b**," and so forth.)

To create an additional answer field:

1   In the **Design the Answer(s)** area of the screen, click the link labeled **Add another answer field**. (For help getting to this screen, see "Opening a question for editing" on page 116.)
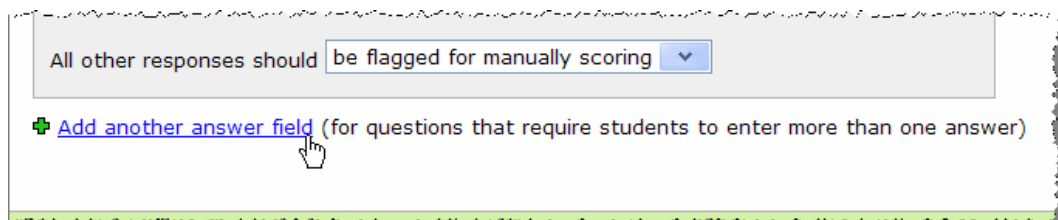
The system updates the screen to include an additional gray box labeled **Answer Field**.

2   If you want the system to automatically score the responses submitted using this answer field, enter the appropriate details under the label **Automatic scoring (optional)**. (For more details on this, see "Setting up automatic scoring" on page 143.) Or, if you want to manually score all student responses entered in this field, you can ignore this section.

3   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

If you have set up automatic scoring for more than one answer field, you may want to select the Partial Credit checkbox, which will allow the system to give the student some points for one answer field even if they miss the other. For details, see "Working with partial credit for multiple answer fields" on page 151.

Setting up automatic scoring

For any **Answer Field** box, you can enter one or more correct (or partially correct) answers that the system can use to grade the student's response.

For each answer you enter, you can specify the following:

•   The percentage of points that the student should be awarded for that response — your choices are 25%, 50%, 75%, or full credit.

•   The precision with which the student must match the response. Your choices for this are described in Table 4-3 on page 144.

Table 4-3. *Short-answer matching options*

option	The student must:
match	Match the spelling of the answer, with no extraneous text. With this choice, the portal forgives capitalization and punctuation errors, as well as leading and trailing spaces.
match exactly	Match the spelling, punctuation, and capitalization of the answer, with no extraneous text. The portal forgives only leading and trailing spaces.
include	Match the spelling of the answer, with or without extraneous text. The portal forgives capitalization and punctuation errors, as well as leading and trailing spaces.
in between	A number (entered in digits, not spelled out) that is between two numbers that you specify (or *is* one of the numbers that you specify), with no extraneous text, no punctuation, and no spaces.

You can set up multiple acceptable responses for each answer field, and give each response a different value. For example, you could give full credit for a complete answer (such as "Martin Luther King, Jr.") and partial credit for an answer that is incomplete but conveys the right general idea (such as "Martin Luther King").

Another approach is to create one correct answer, but have the system give full credit for "matching exactly" and a lesser amount of credit to students who just "match" the answer.

You can also combine different scoring techniques.

To set up automatic scoring for an answer field:

1 Navigate to the **Design the Answer(s)** area of the screen. (For help getting to this screen, see "Opening a question for editing" on page 116. For help understanding the options in the drop-down list, see Table 4-3, above.)

2   Use the left-hand drop-down list to indicate how closely the student must match the answer you are planning to enter.

If you chose **in between**, the system updates the form slightly so that you can enter a number range.

3   Do one of the following:

- If in Step **2** you chose **match**, **match exactly**, or **include**, enter the appropriate response in the text field provided.

- If in Step **2** you chose **in between**, enter a number range in the fields provided.

4   In the drop-down list above the response, specify what percentage of the question's points this response merits:

- Full
- 75%
- 50%
- 25%

5   If you want to add another response that will automatically give the student some amount of credit for this answer field, click the link labeled **Add an alternate correct answer**.

The system adds additional response fields to the screen.

6   Repeat steps 1 through 4 for the new response.

7   If you want all other responses to get zero credit, adjust the last drop-down list in the response field, so that it reads **All other response should receive 0 points**. If you do not do this, then all other responses will be flagged for you to score manually.
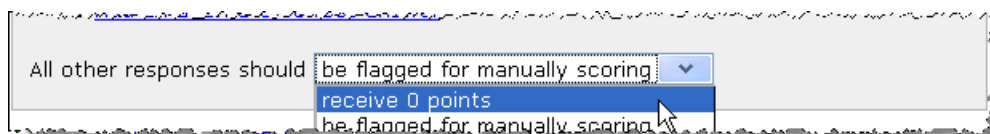
8   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

If you have set up automatic scoring for more than one answer field, you may want to select the Partial Credit checkbox, which will allow the system to give the student some points for one answer field even if they miss the other. For details, see "Working with partial credit for multiple answer fields" on page 151.

Editing a response

If you need to change a response that you already set up, simply open the question for editing and change the text, the style of matching, or the credit value, as appropriate, then save the question.

Deleting a response

If you need to remove a response that you previously set up, do one of the following:

- If the response you want to remove was not the first one you added, you can remove it by clicking the red **x** icon to the right of the response.

- If the response you want to remove *is* the first one on the form, clear the answer text and save the question.
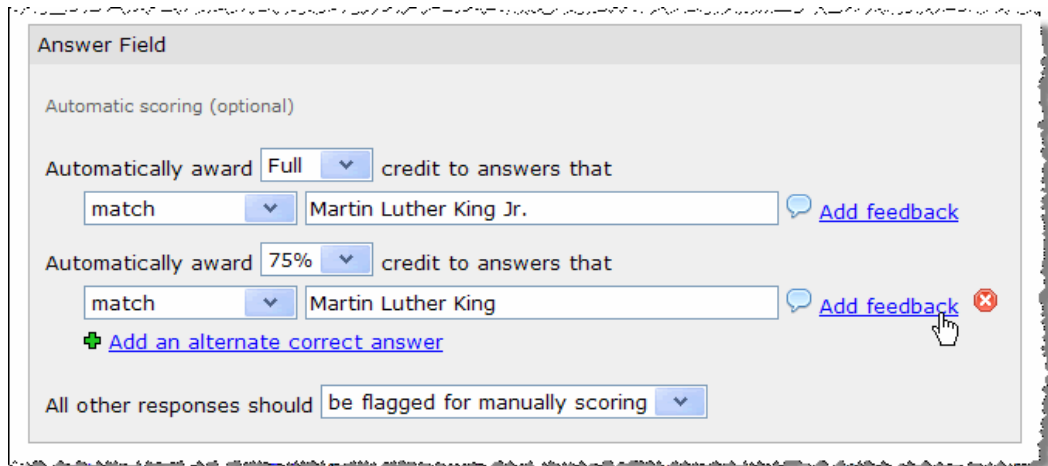
Creating feedback for a response

For each response you have created, you can add automatic feedback. The system will automatically display this feedback for a students who gets credit for the response. Students will see this feedback only if you have set up the test so that they can review their completed work, as described in "Test review" on page 78.

You can also set up a more general type of feedback linked to this question. For details, see "Step Three: Automatic Feedback" on page 152.

To add feedback to go with a response:

1 On the **Design the Answer(s)** area of the screen, locate the response for which you want to add feedback. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2 In the **Answer Field** area, click the **Add feedback** link.

The system displays a pop-up text editor.

3 Enter the feedback you want to display if the student enters this response.

4 Click **Save**.

The system updates the balloon icon in the **Answer Field** area with an ellipsis, which indicates that you have created feedback for this response. However, your feedback will not be saved until you save the question.

5   If you are done working with the question, scroll to the bottom of the screen and click **Save and return to Test Builder**.

Modifying or deleting feedback

If you have set up automatic feedback to go with a particular response, as described in "Creating feedback for a response" on page 148, you may want to change or remove it later.

To modify or delete automatic short-answer feedback:

1   On the **Design the Answer(s)** area of the screen, locate the response for which you want to modify feedback. (For help getting to this screen, see "Opening a question for editing" on page 116.)

2   Click the corresponding **Edit Feedback** link.

The system displays a pop-up text editor showing the existing feedback.

3   Do one of the following:

•   If you want to modify the feedback, make the appropriate changes, then click **Save**.

•   If you want to delete the feedback, click **Clear this feedback**.

The system again displays your response(s). If you deleted feedback, note that the **Edit feedback** link has changed to an **Add feedback** link. However, your changes will not be saved until you save the question.

4   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

Removing an answer field

If you decide later that you want to remove an answer field that you previously added, open the question for editing and click the link labeled **Remove this answer field**.
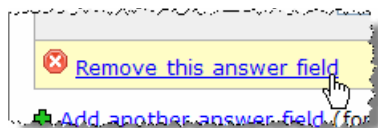
The system will prompt you to confirm that you want to remove the answer field — to complete the removal, click **OK**.

Working with partial credit for multiple answer fields

If you have set up more than one answer field, and if you have configured automatic scoring for all answer fields, by default the system will not automatically give the student any credit unless the student matches responses that you set up as being worth some amount of credit for all answer fields.

If you want the student to get some credit even if they *completely* miss one answer field, select the **Partial Credit** checkbox.

Note that this checkbox is displayed only if your question has at least two answer fields.
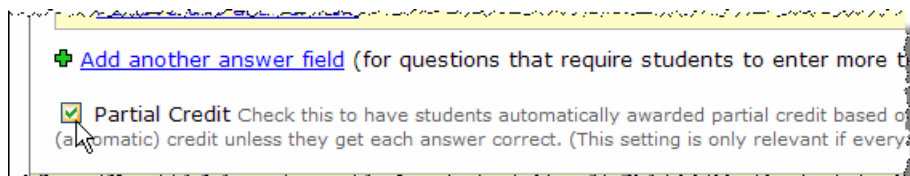
Options for true-or-false

If your answer type is **True or False**, the system adds an **Options** field to the screen with radio buttons for **True** and **False**. Use this field to provide the correct response to the question.
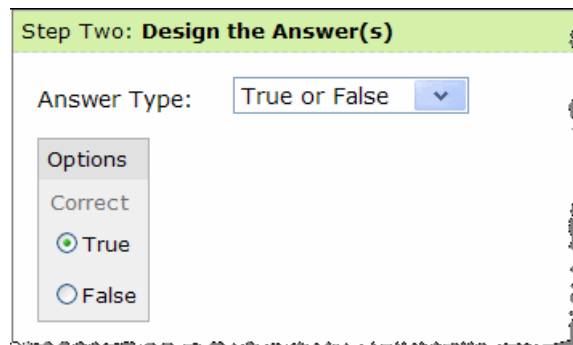
Step Three: Automatic Feedback

If appropriate, you can set up automatic feedback, for any question, using the area of the screen labeled **Step Three: Automatic Feedback**. This area includes three fields:

- **Feedback for all students** — Displayed regardless of how the student responded.

- **Feedback for all correct responses** — Displayed for students who get full credit on this question.

- **Feedback for all incorrect responses** — Displayed for students who get 0 points on this question.

Students will see this feedback only if you have set up the test so that they can review their completed work, as described in "Test review" on page 78.

To add, modify or delete automatic feedback:

1   On the question-design screen, expand the area labeled **Step Three: Automatic Feedback**. (For help getting to this screen, see "Opening a question for editing" on page 116.)

    The screen expands to include fields for added several different types of feedback.

2   Add, modify, or delete feedback text.

3   If you are done working with the question, scroll to the bottom of the screen and click either **Save and add another** or **Save and return to Test Builder**.

If you want to set up feedback for students that are getting partial credit, or feedback that corresponds with a particular option in the answer set, note that you can do this for some question types. For details, see the following sections:

For matching questions, "Creating match/distractor feedback" on page 128.

For multiple-choice questions, "Creating feedback for an option" on page 133.

For ordering questions, "Creating feedback for an item" on page 140.

For short-answer questions, "Creating feedback for a response" on page 148.

Working with point values

Before students can take an online assignment, all of its questions must have point values.

For a regular section (not an extra-credit section), you use these procedures to ensure each question has the appropriate value:

- Adding point values to questions
- Modifying a question's point value

Point values for question pools are handled a bit differently. You do this by editing the section and specifying the point value for all questions there. For more details, see "Type" on page 106.

Adding point values to questions

When a question has no point value, in the main Test Builder screen displays an alert at the upper right corner of the screen and adds yellow highlighting to the section hosting the question. A text field is provided for the question that needs a point value.
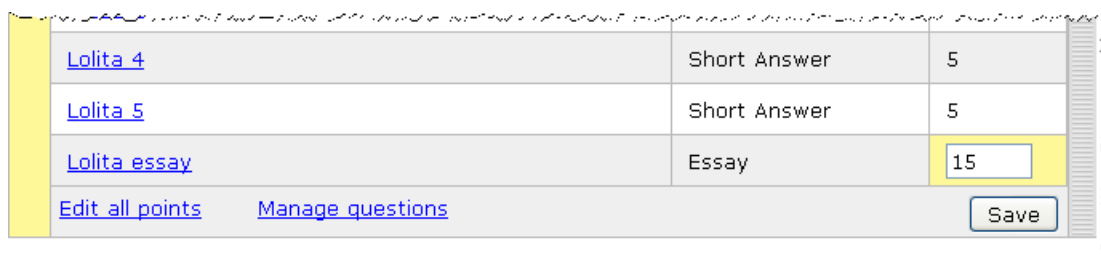
To assign point values:

1   Open the assignment in the Test Builder, as described on page 103.

2   Locate the question that needs a point value, and add the appropriate number in the corresponding **Point Value** column.

3   Click **Save**.

Modifying a question's point value

There are two ways to change a question's point value.

To modify a question's point value:

1   Open the assignment in Test Builder, as described on page 103.

2   Do one of the following:

•   Make your changes on the main Test Builder screen:

   a   Locate the section that contains the question whose value you want to change.

   b   Click the link labeled **Edit all points**.

      The screen updates so that all the **Point Value** fields are modifiable.

   c   Make any changes necessary.

   d   Click **Save**.

•   Make your changes by opening the question for editing:

   a   Open the question for editing, as described on page 116.

   b   Modify the **Point Value** field as appropriate.

   c   Save the question by clicking either **Save and add another** or **Save and return to Test Builder**.

Previewing an test

There are two methods of previewing an assignment:

- You can activate the assignment, then switch to Emulation mode and review and complete the test as a student would. This is described in Chapter 37, "Previewing a context as a student". The disadvantage with this method is that the assignment is also viewable by students once you activate it (unless you are testing it in a test course section; for example, one set up just for your own testing.)

- You can preview the assignment from within Test Builder, which lets you view the assignment and make choices, but not submit it. This is the method described below.

To preview an assignment from within Test Builder:

1 Open the assignment in the Test Builder, as described on page 103.

2 Click the link labeled **Preview this test**.

The system displays the preview. If the assignment has multiple pages, you can page through the whole assignment. The system will display only those sections that contain questions.

3 When finished, click the exit link that displayed at the upper right corner. The exact wording will vary depending on the type of assignment this is (for example, **Exit this Exam**, **Exit this Quiz**, and so forth).

Activating tests

The system will not make a test available for students to take until all of the following are true:

- The test must have been "built," meaning that —
  - The test has at least one question in a non-extra-credit section.
  - Every question has a point value.
- The test has been activated. The various methods of doing this are described in this section.

Making a test active immediately

Use one of these procedures to immediately activate a test that you have finished building.

Through the main Coursework view

To activate a test while working in the main portlet view, click the lightswitch icon that corresponds with the test.

If the icon isn't showing up, that means either that the test is already active, or that it is not ready to be activated. For help resolving this, see "Troubleshooting activation problems" on page 157.

Through the Test Builder
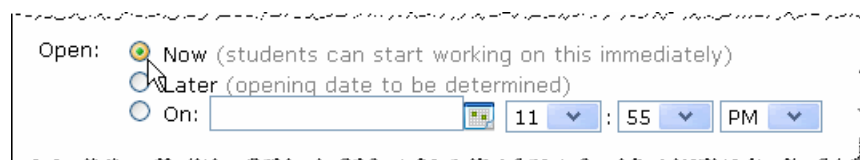
To activate a test while working in the Test Builder, click the **Activate Now** button, which is located at the upper right.
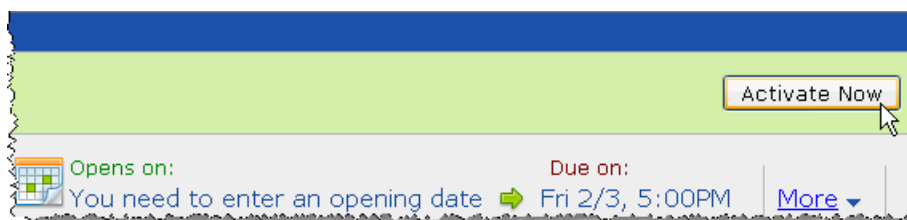
If the icon isn't showing up, that means either that the test is already active, or that it is not ready to be activated. For help resolving this, see "Troubleshooting activation problems" on page 157.

On the screen where you edit the assignment

On the screen where you edit the assignment, you can set the **Open** field to **Now**. Once you save the assignment, it will be activated.
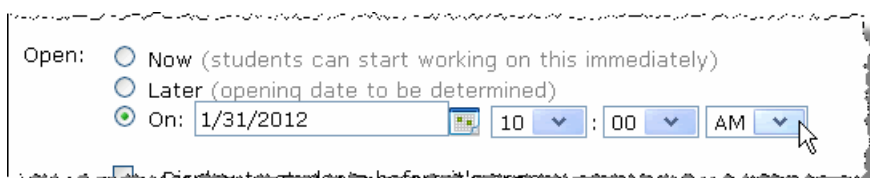
If the **Now** radio button is grayed out, that means either that the test is already active, or that it is not ready to be activated. For help resolving this, see .

Setting a future activation date

You can specify a future activation date on the screen where you edit the assignment. Just set the **Open** field to **On**, then enter the appropriate date and time, and save the assignment.

For help opening a test for editing, see .

Troubleshooting activation problems

If you are having trouble making a test active, double-check that each of the following is true:

- All questions have a point value
- Not all questions are extra credit

All questions have a point value

All questions must have a point value. To check this open the test in the Test Builder — if any questions lack a point value, the system will display a yellow warning and highlight questions that need point values. For more details, see .

Not all questions are extra credit

Unless this is actually an extra-credit assignment, not all questions can be extra credit. You can check this by opening the assignment is Test Builder, as described on , and reviewing the summary of questions. Extra-credit questions are marked with a medal icon.

If the student sees a message that a test has not been 'built'

There is one scenario in which a test might become active before you have completely built it. This can occur if you specify a future activation date, and that date is reached before you finish creating the test. In this case, the test will appear active to students at first, but a message on the Student Assignment Details screen will tell them that the test is not ready to be taken.

Using the e-Racer Locked Browser

This chapter offers additional details and guidance on the e-Racer Locked Browser, a secure browser you might wish to require for online tests.

If you are looking for help specifying that the e-Racer Locked Browser be required for a particular test, note that this is a setting you can configure when you create or modify the assignment. The field that you use to require the browser is **Security**, which is described on page 81. For help opening the assignment for editing, see "Modifying an assignment" on page 92.

This chapter includes more details on how the browser works, how to install it, and related topics.

In this chapter:

- Key concepts

- Features of the locked browser

- Technical requirements for browser installation

- Downloading the browser installers

- Setup tips and suggestions

- Making online tests even more secure

Key concepts

The e-Racer Locked Browser is a customized browser that increases the security of online testing. When students use the e-Racer Locked Browser to access a test, they are unable to print, copy, go to another URL, or use other applications. Students are locked into a test until it is submitted for grading.

For a student to take a test using the e-Racer Locked Browser, the browser must first be installed on the student's computer.

The browser installer provides a custom interface for the Internet Explorer (Windows) or Safari (Macintosh) software that is already installed on the computer. The locked-browser installer does not modify existing copies of Internet Explorer or Safari, but rather installs a separate program that will display the custom browser when it is started.

The e-Racer Locked Browser uses the same security features and service packs that are currently installed for Internet Explorer or Safari. Installing the e-Racer Locked Browser won't modify the current version of Internet Explorer or Safari in any way.

Features of the locked browser

The e-Racer Locked Browser creates a "locked" testing environment for e-Racer online tests. It includes the following features, among others:

- Tests are displayed full-screen and cannot be minimized.

- Tests cannot be exited until submitted by students for grading.

- Task switching is prevented, as are any attempts to access other applications.

- Printing functions are disabled.

- Print Screen and capturing functions are disabled.

- Copying and pasting anything to and from a test is prohibited.

- Right-click menu options are disabled (Windows); key + click options are disabled (Macintosh).

- Browser menu and toolbar options are disabled except Back, Forward, Refresh and Stop.

- Function keys (F1-F12) are disabled.

- Source code for the HTML page cannot be viewed.

- URLs cannot be typed.

- Hundreds of screen capture, messaging, screen-sharing and network monitoring applications are blocked from running.

- The browser automatically starts when the student launches a test that requires the e-Racer Locked Browser (by clicking the links labeled **Start the** *test*, **Resume the** *test*, or **Launch the locked browser to review your** *test*).

- Links in questions that point to other servers don't compromise the "locked" testing environment.

- Pages from the test aren't cached or stored in the browser's history.

The e-Racer Locked Browser is not intended to replace the browser typically used by faculty or students within e-Racer. The e-Racer Locked Browser is only intended for use by students while taking tests that have been prepared for use with locked browser. The locked browser has not been tested for use in other areas of e-Racer.

Technical requirements for browser installation

This section describes prerequisites for students' computers.

Windows

A Windows computer must have the following:

- Windows 7, Vista, XP, or Windows 2000

- Internet Explorer

- 4 MB of permanent space on the hard drive

Note also that prior to installation, the student (or an administrator) should have started Internet Explorer at least once and dismissed any prompts presented related to settings or preferences.

Macintosh

A Macintosh computer must have the following:

- OS X 10.3.9 or higher (Power PC or Intel)

- Safari

- 2 MB of free hard drive space

- 512 MB RAM

Note also that prior to installation, the student (or an administrator) should have started Safari at least once and dismissed any prompts presented related to settings or preferences.

Downloading the browser installers

Depending on your school, there may be a few ways for you to obtain the locked-browser installers.

Obtaining the installer from the Student Assignment Details screen

It is possible to obtain the installers through e-Racer. To do this, use this procedure.

To obtain the installers from the Student Assignment Details screen:

1   Create an online test that requires students to use the locked browser. (For help creating tests, see "Creating an assignment" on page 88.)

2   Make the test visible to students, either by activating it or marking it as visible (by choosing the option labeled **Display to students before it's open**, in the **Step 1** portion of the form where you create the assignment).

3   Use Student Emulation to view the Coursework portlet as a student:

   a   At the upper right corner of the screen, set the drop-down list to View as: Students.

   b   Click **Change View**.

4   While in the student view, open the Student Assignment Details screen for the test that you created in Step 1. Note that this screen allows you to download either the PC or Mac version of the installer.

Other options

Jenzabar makes the e-Racer Locked Browser available on its support site, MyJenzabar.net (http://www.myjenzabar.net/ics/). If you do not have access to this site, check with an administrator for your school's portal — they may already have the installers available for you.

If not, ask an administrator to obtain the installers using the steps below.

To obtain the installers from MyJenzabar:

1   Log in to http://www.myjenzabar.net/ics/.

2   Choose **Support** > **e-Racer** > **e-Racer Installers**. The installers can be downloaded from this page.

Setup tips and suggestions

Make sure students know well in advance that they must use the e-Racer Locked Browser to take an online test. This is particularly important if students are required to install the e-Racer Locked Browser on their own computers.

It is also recommended that you have students visit the test's Student Assignment Details screen as soon as it is visible – even if they can't yet take the test. The Student Assignment Details contains a confirmation link the student can use to make sure the e-Racer Locked Browser is properly installed.

If you are giving the test in a computer lab, be sure that the staff has installed the e-Racer Locked Browser on all computers there before your test begins.

It's also a good practice for you to preview the exam using e-Racer Locked Browser. This can be done using the Student Emulation feature, which is described in "Previewing a context as a student" on page 607.

Once a student begin a test in the e-Racer Locked Browser, the test will appear in a full-screen window, and all other applications and links will be locked down. The student cannot exit the test without clicking the **Exit** link or using the **Submit** button.

The e-Racer Locked Browser will maintain the "locked" testing environment even if a question contains a link to another web page (which opens another secure browser window). However, all links that may appear on the new web page will be blocked, so be sure the content that students must see is available from the initial linked page.

Making online tests even more secure

The e-Racer Locked Browser is an important tool for preventing cheating, but it's not a total solution. For example, students working from remote locations could use two computers at once (one for taking the exam, the other for accessing other applications). Students could use digital cameras to capture the screen content, send text messages on mobile phones, or simply refer to printed notes.

Additional methods can be employed that further reduce the risk of cheating and ensure that students know the course material. Each approach below provides another "layer of security." Even one or two of these items can often provide sufficient security for most tests.

Have a proctor monitor test taking

Having students take an exam in a room being monitored by a proctor is a major deterrent to most forms of cheating. Enhance this method by having the proctor check the identification of the student prior to the start the exam, placing web cameras throughout the room, or using a "test password" (see next item). If your course is taught remotely, note that proctored settings can be established in other cities, even other countries. Because of the time and expense required for a proctored setting, proctors are sometimes used only with high-stake tests (such as midterms and finals).

Set up a password for opening the test

Using a password prevents students from accessing the test until a password has been supplied. You can set up a password for any online test when you create (or edit) the assignment. The password feature is described more on .

You can simply give students the password at the start of the test, or, for added security, you can have a proctor enter the password for each student.

Disallow multiple attempts

If you allow only one attempt for a test, students won't be able to look up the answers to questions between attempts. You control the number of attempts allowed when you create (or edit) the assignment. The setting feature is described more on .

Randomize answers

Answer choices to multiple choice questions can easily be randomized. You can set this when you create the question, or when you modify it later. For details, see .

Randomize questions

For tests delivered in a classroom setting, question randomization is a good strategy. You can randomize the questions in any section on your test. For details, see .

Use question pools

Question pools are groups of questions that assess similar content. During a test, questions are randomly drawn from the pool so that each student sees a different set of questions. For example, the first question in a test might be drawn from a pool of 5 questions, making the odds only 1 in 5 that two students will see the same question. Question pools are ideal for creating alternate forms of the same question. For help creating a question pool, see page 106.

Use time limits

By limiting the time a student can spend on a test, students can be discouraged from consulting other sources (since they won't have time to do so). Time limits can be set at the test level or at the section level — or both — to give as much control as you need over the available time.

For details on time limits for a test, see page 79. For help setting up a time limit in a section, see page 108.

Restrict the dates and times that the test can be viewed

Consider restricting when the test can be launched and when it must be turned in. You can do this using the start date and the end date settings of the assignment. These are described in "Open" on page 74 and "Due date" on page 71.

Deliver questions one at a time

Have the test deliver questions one at a time. Having test questions delivered this way makes it more difficult for students to capture the test's contents using a digital camera (because a test of 50 questions would require 50 photos.) This can be controlled using the **Pagination** field, which is in the **Step 2** area of the screen where you edit the assignment. For details, see "Pagination" on page 80.

Require the e-Racer Locked Browser for test review

If you allow students to review their completed, corrected test, you can require they use the e-Racer Locked Browser to view it. This is another way of limiting the possibility that the questions can be copied. For help setting this up, see "Requiring the e-Racer Locked Browser" on page 81.

Create a code of conduct

Have students sign a statement that summarizes your expectations and requirements regarding academic honesty.

Other ideas

Combine objective tests with other methods of assessment, such as group projects and writing assignments. Essay questions also make it difficult for students to cheat, because they will know the instructor may recognize an answer that has been copied from another student.

6

Managing and grading assignments

For each assignment in the Coursework portlet, you will probably want to review students' work, enter scores, and so forth. This chapter describes these processes.

In this chapter:

Key concepts

There are a number of actions you might want to take with assignments you've created. Most of these tasks are things you would do once you're made the assignment available to students. These actions vary depending on the assignment's format.

Uploaded assignments

For an uploaded assignment, you may want to do some or all of the following:

- Monitor student progress, as described on page 171.
- Download students' files for review, as described on page 174.
- Manage a particular student's ability to interact with the assignment. You can do any of the following as needed:
  - Give a student a personalized start date or due date, as described on page 180.
  - Manually close an assignment, ending a student's ability to work on it and allowing you to enter a grade, as described on page 183.
  - Reopen the assignment, as described on page 184.
- Grade the assignment and, optionally, enter feedback, as described on page 199.

Online tests

For an online test, you may want to do some or all of the following:

- Monitor student progress, as described on page 172.
- Review students' completed tests, as described on page 175.
- Manage the student's ability to interact with the test by doing any of the following as needed:
  - Give a student a personalized start date or due date, as described on page 170.
  - Manually close an assignment, ending a student's ability to work on it and allowing you to enter a grade, as described on page 183.
  - Reopen the assignment, as described on page 184.
  - Give a student a personalized time limit, as described on page 186.
  - Let a student rework an attempt on a test, as described on page 187.
  - Grant a student a retake, as described on page 189.
- Grade the test and, optionally, enter feedback, as described on page 192.

Basic assignments

If you are using basic assignments, at some point you will need to enter grades for students and, optionally, feedback. To complete these tasks, see "Grading basic and uploaded assignments" on page 199.

Monitoring student progress

After activating an assignment, you may want to periodically check to see whether students have completed it. You can do either of the following:

- To see a list showing which students have completed an assignment, refer to the assignment overview. For more details see "Understanding the assignment overview," below.

- To see an overview of all work that a particular student has completed, refer to the Student List, which is described in "Viewing the Student List" on page 173.

Understanding the assignment overview

This section includes a few more details on the assignment overview. This screen offers slightly different options and information depending on the assignment's format — each one is described below.

If you need help getting to the assignment overview, see "Navigating to the assignment overview" on page 96.

For uploaded assignments

With uploaded assignments, the assignment overview tells you whether students have uploaded files and marked them as final. You get these details from the **Grade** and **Files** columns:

- If the **Grade** column has a link that says **Download**, that means the student has uploaded at least one file and marked it as final. You can see how many files were uploaded by looking at the **Files** column.

- If the **Grade** column is empty but there is a number in the **Files** column, that means the student uploaded at least one file but did not mark it as final (and the student may still be working).

Coursework

Essay
Paper in Unit 5

due **Today, 5:00 PM** | Edit this assignment | Edit all grades | More ▾

Student Results

	Student	Files	Grade	Turned in
	Adams, Jennifer	1	Download	12/12/2011 3:10:48 PM
	Jones, Frank	0		Still open
	Miller, Grace	1	Download	12/12/2011 3:15:57 PM
	Roberts, Jane	1	Download	12/12/2011 3:16:42 PM
	Thomson, Jeff	0		Still open
	Williams, Aaron	1		Still open

Note that if the due date has passed, all students will have a date in the **turned in** column, even if they did not upload a file and mark it final. This is because the system automatically closes the assignment for the student when the due date passes. If the student never uploaded a file, the system will also automatically give the student a failing grade.

If the **Grade** column shows a **Download** link, you can click this to download the student's files. If you don't see a **Download** label but want to review the student's uploaded files, click the student's name to display the Student Assignment Details screen — from this screen, you can download the files. (For more details, see "Reviewing uploaded assignments" on page 174.)
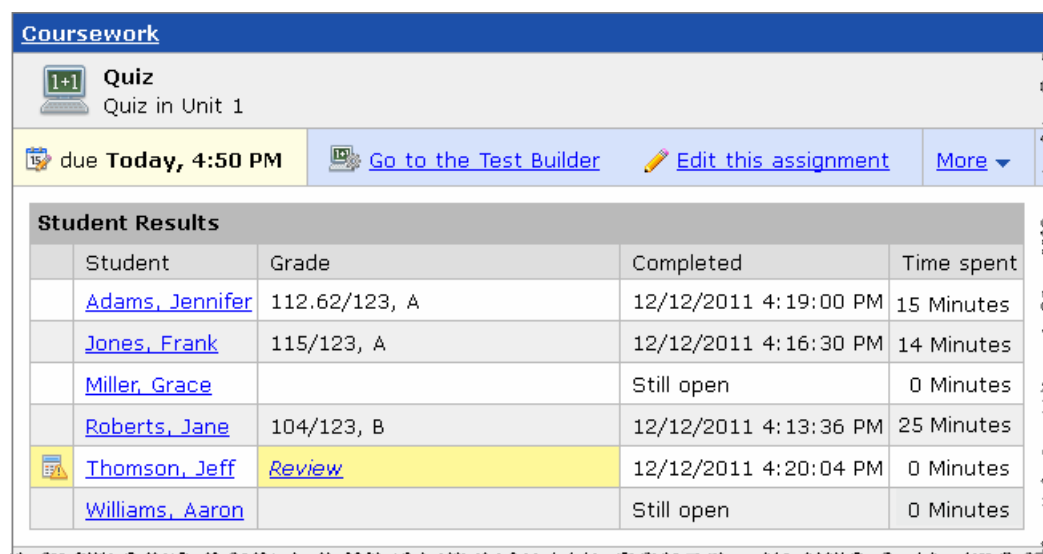
Yellow highlighting on any student's name means that there is an action that needs to be taken with that assignment — either the student has to finish working, or you have to give the student a grade.

For online assignments

With online assignments, you can use the assignment overview to see who has finished the test, how long each student spent on the test, and other details.

You can see each student's progress by looking at the **Completed** column:

- If the value in this column is **Still open**, that means either that the student has not taken the test, or that the student has unused attempts remaining.

- If the student has used all of his or her attempts, then the **Completed** column shows the time the student completed the last attempt.

Coursework

Quiz
Quiz in Unit 1

due **Today, 4:50 PM** | Go to the Test Builder | Edit this assignment | More ▾

Student Results

	Student	Grade	Completed	Time spent
	Adams, Jennifer	112.62/123, A	12/12/2011 4:19:00 PM	15 Minutes
	Jones, Frank	115/123, A	12/12/2011 4:16:30 PM	14 Minutes
	Miller, Grace		Still open	0 Minutes
	Roberts, Jane	104/123, B	12/12/2011 4:13:36 PM	25 Minutes
	Thomson, Jeff	*Review*	12/12/2011 4:20:04 PM	0 Minutes
	Williams, Aaron		Still open	0 Minutes

Note that if the due date has passed, all students will have a date in the **Completed** column, even if they did not take the test. This is because the system automatically turns in the test for the student when the due date passes. If the student never took the test, the system will also automatically give the student a failing grade.

If the **Grade** column shows a **Review** link, you can click this to review the student's work. The **Review** label displays only if the test includes questions that you must grade manually. If you don't see a **Review** label but want to review the student's assignment, click the student's name to

display the Student Assignment Details screen — you can view the completed assignment on this screen. (For more on reviewing online assignments, see .)

The **Time spent** column shows the total amount of time that the student spent on the test. If the test was set up to allow multiple attempts, this column shows the amount of time spent on the most recent attempt.

Yellow highlighting on any student's name means that there is an action that needs to be taken with that assignment — either the student has to finish working, or you have to give the student a grade.

Viewing the Student List

For every course, the system includes a Student List that lists all students associated with the course (both enrolled and non-roster students).

This list shows the number of assignments each student has finished and includes a link to the student's most recent submission. If the student has any assignments that need to be graded, the student's name is highlighted in yellow and marked with the needs-grading icon.

To view the Student List:

1 Navigate to the Coursework portlet, as described on .

2 In the pane at the upper left, click **Student List**.

   The system displays the Student List. From here you can click any student's name to see more details about that student's work and, optionally, enter grades. You can also click any item in the **Recent submission** column to go to the Student Assignment Details screen for the corresponding student and assignment.

Reviewing completed assignments

This section describes how to review students' uploaded and online assignments.

Reviewing uploaded assignments

When you are ready to review students' uploaded assignments, you can do either of the following:

- Download all students' files in a single `.zip` archive. In this case, the `.zip` archive will contain a folder for each student.

- Download each individual student's file (or files) separately. In this case, you'll download a single `.zip` archive that contains the file or files turned in by one particular student.

You can do this at any time after students have begun uploading the files — even if students have not marked the files as final. Just be aware that if the student did not mark the file(s) final, he or she is probably still working.
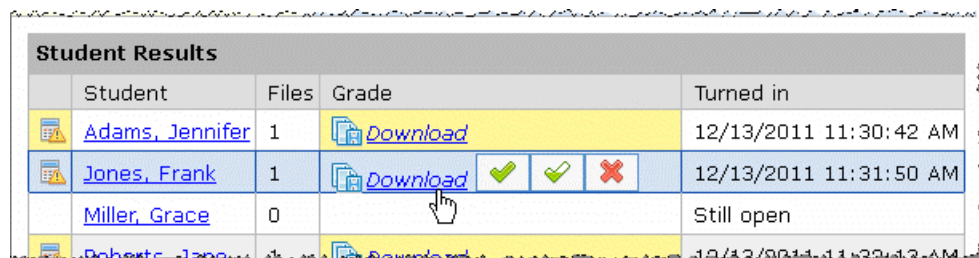
To download files:

1   Display the assignment overview, as described on .

2   Do one of the following:

   •   If you want to download all uploaded files together in one `.zip` archive, click the link labeled **Download all files** and follow the prompts to save or open the `.zip` archive.
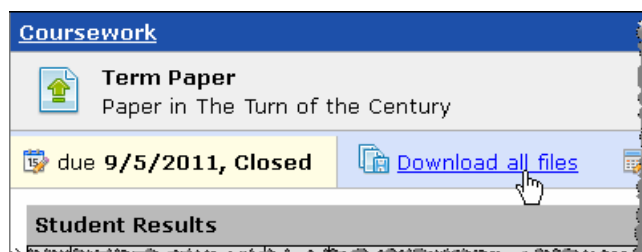
   Note that if the link is not in the action bar, then you should see it in the **More** menu.

   •   To download a single student's files, locate the student's name on the assignment overview. If you see the **Download** link on this screen, in most cases that means that the student has marked the assignment as final and feels that the work is done (it could also mean that the due date passed, and the files were automatically marked final by the system). Click the **Download** link and follow the prompts for opening or saving the `.zip` archive.

- If there is no **Download** link, but the **Files** column indicates that the student has uploaded one or more items, this means that the student has not yet marked the files as final and may still be working on them. If you still want to download the files, click the student's name to display the Student Assignment Details screen. This screen lists the files that the student has uploaded. You can click the name of one of the files to download it, or click **Download all of** *student name's* **files**.
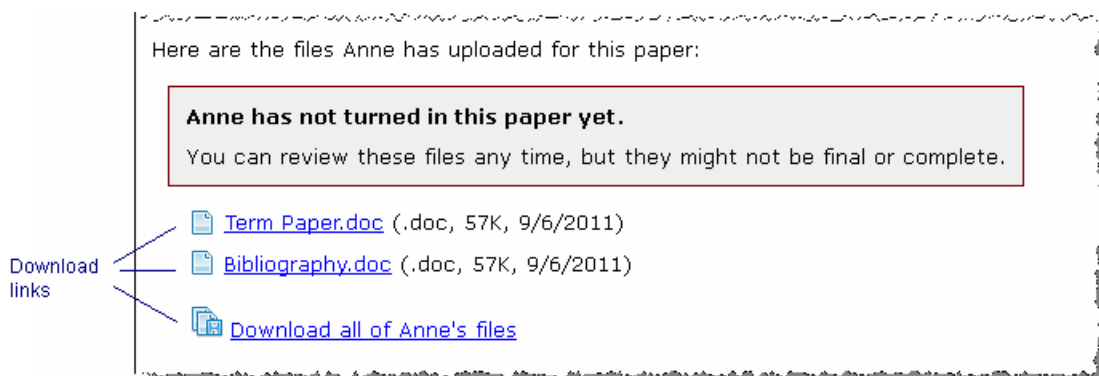
Reviewing online tests

After a student completes an online test, you may want to go over the completed test to grade individual questions or just take a look at the student's work. You also have the option of viewing all students' answers to a single question side by side. This might be useful if you want to compare the full range of different responses while grading.

Reviewing one student's test

Use this procedure to view one student's work on an online assignment.

To review a student's test:

1 Navigate to the assignment overview, as described on page 96.

2 Locate the name of the student whose work you want to review. If you want to check whether the student is done, look at the **Completed** column:

- If this column lists a date and a timestamp, then the student is done — continue to step 3.
- If this is a test that allows retakes, and the student has not yet used all of his or her attempts, the value in this column is **Still open**. Still, it is possible that the student used one or more attempts that you may want to review. You can tell this by looking at the **Time spent** column. If the student submitted an attempt and is not currently in the midst of a new attempt, the **Time spent** column will show a value. In this case, if you want to review the student's attempt(s), continue to step 3.

3   Do one of the following:

- Click the corresponding **Review** link for the student.

- If there is no **Review** link, click the student's name to display the Student Assignment Details screen, then scroll to the bottom of the screen. If the student has taken the test, you will see the beginning of the student's responses.

Note that you can page through the test from here, or you can click the link labeled **Show the whole *assignment type* on one page**.

By default, each question is truncated, but there are links throughout the screen that let you expand an individual question or all questions.

If the student took the test more than once, each attempt is represented by a tab.
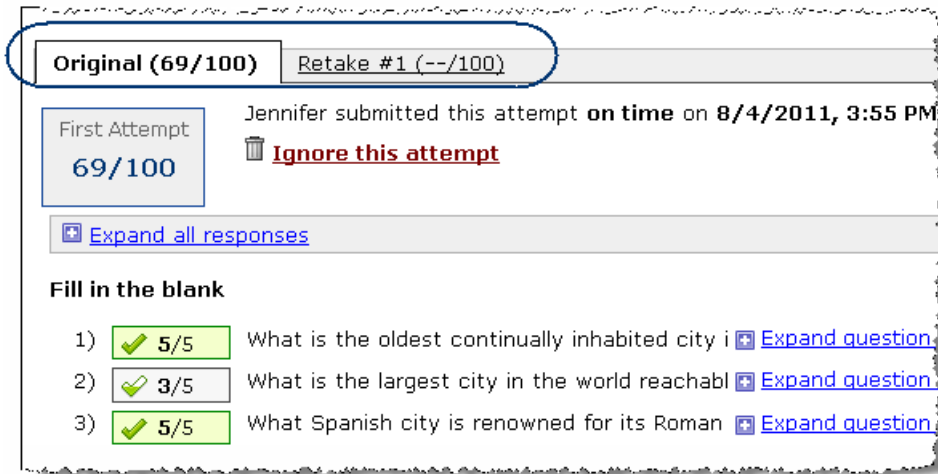
4   From this point, you may want to grade individual questions and enter feedback, as described in "Grading assignments" on page 190.

Viewing all students' responses to a question

In some cases, you might want to view all students' responses to a particular question side by side. You can navigate to this view in a few different ways.

To view all students' responses to a single question:

Do one of the following:

*   Start from the assignment overview —

    a   Open the assignment overview, as described on page 96.

    b   Click the link labeled **Grade by question**.
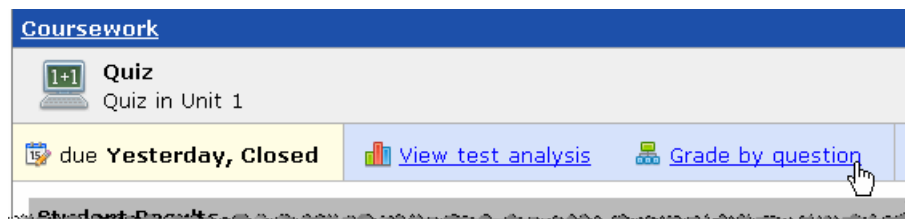
    If you do not see this link in the action bar, look in the **More** menu.

*   Start with a single student's test —

    a   View a student's completed test, as described on page 175.

    b   Locate the question that you want to review. Expand the question, if it is not already expanded.

c   Click **View all students' responses to this question**.
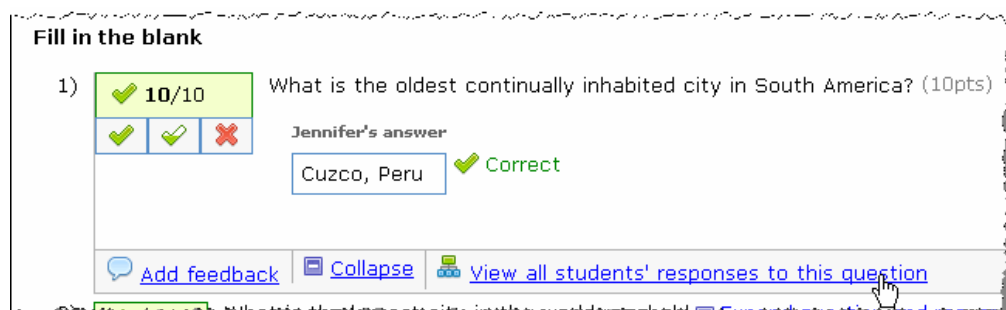
If students already have scores, the system displays a summary of the scores, with links that let you expand any single response.
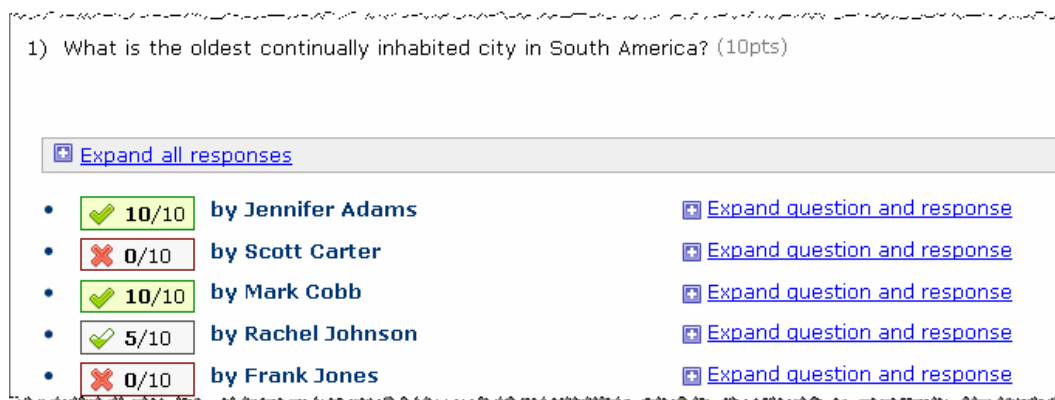
If students do *not* already have scores on this question, the system displays all responses on the screen, along with scoring icons.

5   To display all students' responses, click **Expand all responses**, which is at the upper left.

Managing active assignments

Although most assignments are set up with a specific start date, a specific due date, and related settings, many of these parameters can be adjusted for an individual student. Note that the exact options vary depending on the assignment's format.

Options for uploaded and online assignments

The following describe some of the options for uploaded and online assignments:

- Working with personalized start and due dates

- Closing an assignment for a student

- Reopening an assignment

- Viewing the detailed history for an assignment

For online tests, there are some additional options, which are described starting on page 186.

Working with personalized start and due dates

If a student needs to take a test at a different time than the rest of the class, you might want to give the student a personalized start date, a personalized due date, or both.

Setting a personalized start date

If you give a student a personalized start date, that is the date on which the assignment will open for him or her, and the start date defined for the assignment is mostly ignored. You can give the student a personalized start date only if the start date defined for the assignment has not yet passed.

When you set a personalized start date, you are allowed to choose a date that occurs before or after the start date for the assignment.

To give a student a personalized start date:

1   Navigate to the appropriate Student Assignment Details screen, as described on page 99.

    At the top of the screen is a link labeled **a different start date**. (If you do not see this, then the assignment is already open and you cannot give the student a personalized start date.)
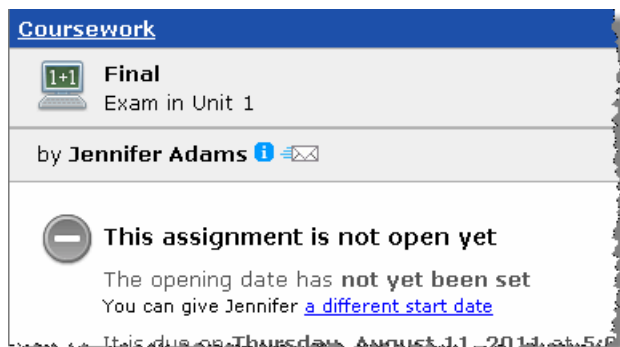
2 Click **a different start date**.

The system displays a dialog box labeled **Individual Start Date**.

3 Enter the appropriate date and time using the fields provided.

4 Click **Save**.

The system saves the personalized date. Your view of the Student Assignment Details screen for this student will now show this as the start date. If the assignment is visible to the student, he or she will also see this date.

Note that on your view of the Student Assignment Details screen, there is no indication this is a personalized date for the student, but in the future, any authorized user who visits this screen will be able to tell that the date has been customized by clicking **a different start date** — if a student's start date has been personalized, then the pop-up includes an option that reads **Remove** *student name's* **individual start date**.

You can also see that the start date was customized by viewing the detailed history of the assignment, as described on page 185.

Setting a personalized due date

If the assignment's due date has not yet passed, you can give the student a custom due date that differs from the one set for the assignment.

If the assignment's due date is configured to show up on the course calendar, the student's My Calendar will still show the due date defined for the assignment, not the date customized for him or her.

To give a student a personalized due date:

1 Navigate to the appropriate Student Assignment Details screen, as described on page 99.

The screen includes a line of text indicating the date and time the assignment is due, along with an option for creating a different due date.
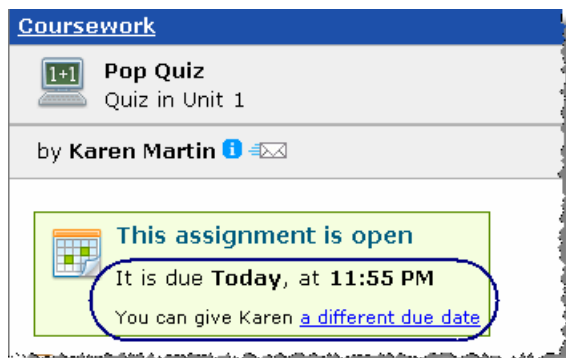
*If you do not see the link labeled **a different due date**, that means the due date for the assignment has already passed, or that the student has already taken the test and used all available retakes. In either case, the assignment is considered closed for the student. If this is the situation and you still want the student to be able to continue working, you can let the student rework an existing attempt, as described on* page 187*, or reopen the assignment so the student can use any remaining attempts, as described on* page 184*.*

2 Click the link labeled **a different due date**.

 The system displays the **Individual Due Date** pop-up.

3 Enter the appropriate date and time.

4 Click **Save**.

 The system saves the personalized date. Your view of the Student Assignment Details screen for this student will now show this as the due date. If the assignment is visible to the student, he or she will also see this date.

 Note that on your view of the Student Assignment Details screen, there is no indication that this is a personalized date for the student, but in the future, any authorized user who visits this screen will be able to tell that the date has been changed by clicking **a different due date** — if a student's due date has been personalized, then the pop-up includes an option that reads **Remove** *student name's* **individual due date**.

 You can also see that the due date was customized by viewing the detailed history of the assignment, as described on page 185.

Removing or changing a personalized due date or start date

If you've given the student a personalized due date or start date that you now want to remove or change, use this procedure.

To remove or change a personalized due date or start date:

1 Navigate to the appropriate Student Assignment Details screen, as described on page 99.

2   Click one of the following:

- the link labeled **a different start date**.
- the link labeled **a different due date**.

The system displays a pop-up.

3   Do one of the following:

- To modify the personalized date, change the date and time fields, then click **Save**.
- To delete the personalized date and revert to the date defined for the assignment, click **Remove** *student name's* **individual** *due/start* **date**.

Closing an assignment for a student

The Student Assignment Details screen includes a feature that lets you close the assignment for the student and enter a grade.

You might want to do this for a few different reasons. For example, suppose you have created an online test that allows retakes and uses the student's best attempt for the final score. If a student did perfectly on the first attempt, you may want to close the assignment, since he or she does not need the additional attempts.

If the assignment was an uploaded assignment, you might want to close it if the student gave you a hard-copy version of his or her file, or if the student uploaded a file but failed to mark it as final (and you know that it is the final version).

To close an assignment for a student:

1   Navigate to the appropriate Student Assignment Details screen, as described on .

You will not be prompted to confirm that you want to close the assignment, so make sure you really want to close it before proceeding.

2   Click the link labeled **Close the assignment**. (If you do not see this link, then the assignment is already closed.)
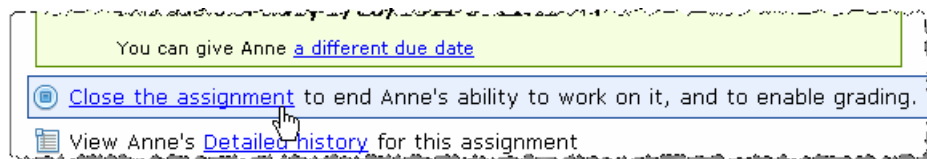
The system closes the assignment. The student can no longer work on it, and you are allowed to enter a grade.

If you later decide you want to reopen the assignment for the student, see .

Reopening an assignment

There may be cases where an assignment has closed for a student — either because the student completed it or because the due date passed — but you want the student to be able to continue working. In many cases, you can address this by reopening the assignment.

Reopening works differently depending on the assignment's format:

- If this is an uploaded assignment, reopening it allows the student make changes to the file(s) that he or she already uploaded. If the student has not exceeded the maximum, the student will also be allowed to upload more files.

- If this is an online test, reopening the assignment is possible only if the student never took the test or has at least one retake remaining. Reopening will allow the student to use the remaining attempt(s).

If the student does not have additional attempts outstanding, consider granting the student a retake, as described on *, or letting the student rework an earlier attempt, as described on* *.*

For both assignment formats, you can also extend the due date when you reopen the assignment.

To reopen an assignment for a student:

1 Navigate to the appropriate Student Assignment Details screen, as described on .

2 Click the link labeled **Reopen the** *assignment type*. (If this is an online assignment and you don't see this link, in most cases that means the student does not have outstanding attempts available, and you cannot reopen the assignment.)
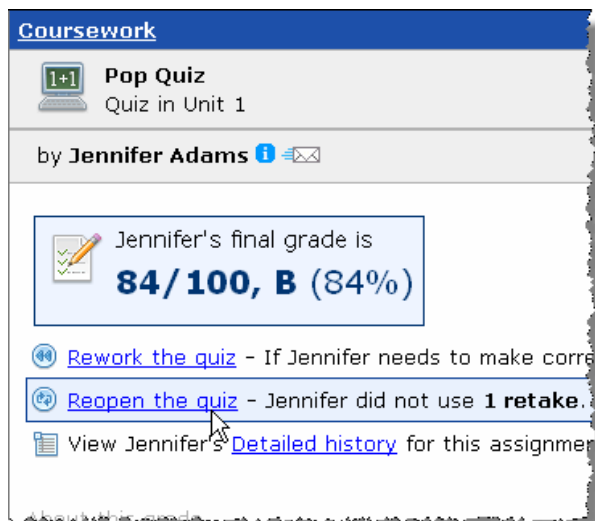
After you click **Reopen the** *assignment type*, the system displays a pop-up that lets you do either of the following:

- Give the student a personalized due date. (If the due date for the assignment has already passed, giving the student a new due date is required.)

- Enter a comment for the student. This message will display on the student's view of the Student Assignment Details screen.

3 Click the **Reopen the *assignment type*** button.

The system reopens the assignment for this student. In the student's view of the portlet, the assignment will revert from being grayed out to showing as a hyperlink, indicating that the assignment is open.

If the student previously attempted the test or uploaded a file, the system will add a status message that says **In Progress**.
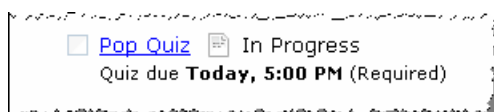
Viewing the detailed history for an assignment

If you want to see details of the actions taken with an assignment — such as when the student started taking it, whether or not the student was granted a personalized due date, and so forth — you should view the detailed history for the assignment.

To view the detailed history of an assignment:

1 Navigate to the appropriate Student Assignment Details screen, as described on page 99.

2 Click the link labeled **Detailed history**.
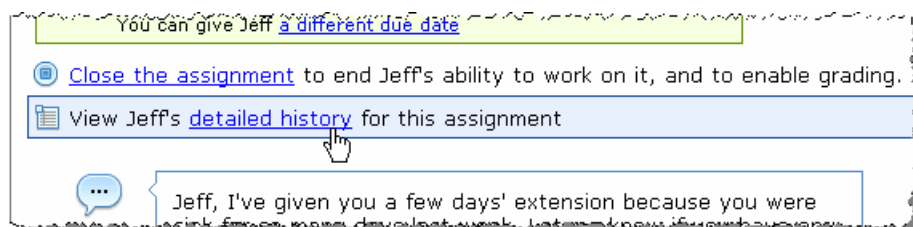
The system displays a pop-up that lists actions that the student took, and actions that you took specific to this student.

Options for online assignments

In addition to the choices described in "Options for uploaded and online assignments" on page 180, you can also do any of the following when managing online tests:

- Give a student a personalized time limit, as described below.

- Let a student rework an attempt, as described on page 187.

- Grant a student a retake, as described on page 189.

Working with personalized time limits

If desired, you can give a student a customized time limit for completing an online assignment. This time limit will supersede any time limit that might have been set for the assignment.

Setting a personalized time limit
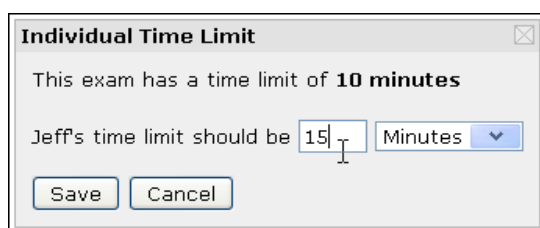
Use the procedure below to give a student a personalized time limit.

To give a student a personalized time limit:

1   Navigate to the appropriate Student Assignment Details screen, as described on page 99.

2   Click the link labeled **Personal time limit**. (If you don't see this link, then the assignment has already closed for the student, or it is not an online test.)

    The system displays a dialog box labeled **Individual Time Limit**.

3   Enter the appropriate time limit.

4   Click **Save**.

    The system saves the personalized time limit. Your view of the Student Assignment Details screen for this student will now show this time limit. If the assignment is visible to the student, he or she will also see this time limit.

    Note that in your view of the Student Assignment Details screen, there is no indication that this value has been customized, but in the future, any authorized user who visits this screen will be able to tell this is a personalized time limit by clicking **a different time limit** — if the time limit is customized, the pop-up includes an option that reads **Remove** *student name's* **individual time limit in favor of the standard limit**.

    You can also see that a custom time limit was added for this student by viewing the detailed history of the assignment, as described on page 185.

Removing or changing a personalized time limit

If you've given a student a personalized time limit that you want to remove or change, use this procedure. Note that when you remove a time limit for a student, whatever time limit you defined for the assignment (if any) will apply.

To remove or change a student's personalized time limit:

1   Navigate to the appropriate Student Assignment Details screen, as described on .

2   Click the link labeled **Personal time limit**.

The system displays a dialog box labeled **Individual Time Limit**.

3   Do one of the following:

•   To delete the personalized time limit and revert to whatever time limit (if any) is defined for the assignment, click **Remove** *student name's* **individual time limit in favor of the standard limit**.

•   To modify the personalized time limit, edit the time fields and click **Save**.

Letting a student rework an assignment

After a student submits a test, you can open the test back up to let the student refine his or her answers and complete any unanswered questions. This is the equivalent of handing a hard-copy test back to the student for further work. In e-Racer, this is called letting the student rework the assignment.
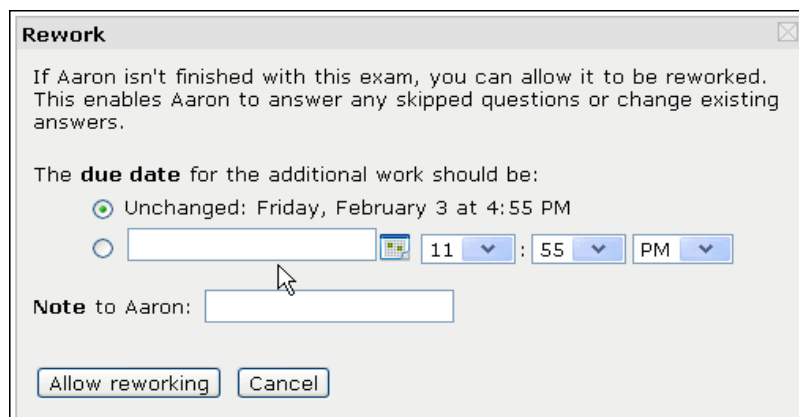
To let a student rework an assignment:

1   Navigate to the appropriate Student Assignment Details screen, as described on .

2   Click the link labeled **Rework**.

If you don't see the Rework link, it means the student did not take the test and therefore has nothing to rework. If the student did not take the test and the due date has passed, you can still give the student another chance by reopening the assignment, as described on .
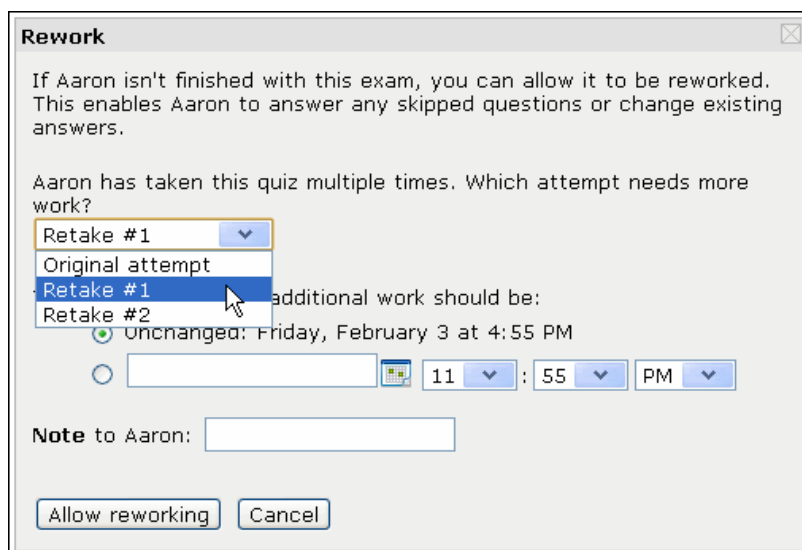
The system displays the **Rework** pop-up.

If the student took the test more than once, the dialog will include a drop-down list that lets you select a specific attempt for the student to rework.

3   Fill out the form as follows:

- If the student took the test multiple times, use the drop-down list to select one of the attempts.

- If appropriate, enter a different due date. If the due date for the assignment has already passed, this is required.

- If appropriate, enter a note to the student. This message will display on the student's view of the Student Assignment Details screen.

4   Click the **Allow reworking** button.

The student will now be able to resume work on the assignment.

Granting a student a retake

If you want to grant a student an extra retake (in addition to any that you might have defined for the assignment), use this procedure.

To grant a student a retake:

1 Navigate to the appropriate Student Assignment Details screen, as described on page 99.

2 Click the link labeled **Grant a retake**. If you don't see this option, then either the due date has already passed, or the assignment is set up to allow an unlimited number of retakes.

If the due date has passed but you want the student to be able to keep working, see "Reopening an assignment" on page 184.

The system displays a pop-up screen with several options.

3 Fill out the form as follows:

- If appropriate, enter a different due date for the retake.
- Choose one of the options listed for determining how this retake should affect the student's overall grade for the assignment.
- Optionally, specify the minimal amount of time between the end of the student's last attempt and the time they can begin the retake.
- Enter a note for the student. This message will display on the student's view of the Student Assignment Details screen.

Note that you will not be able to edit these choices later, so make you sure enter the appropriate values before closing the pop-up screen.

4 Click **Grant a retake**.

The system gives the student one additional retake, and the screen updates to show the new number of retakes available. If the assignment is visible to the student, he or she will also see this updated number.

Note that on your view of the Student Assignment Details screen, there is no immediate indication that the available retakes for this student is different from the rest of the class, but you and other authorized users can see that number of retakes was customized by viewing the detailed history of the assignment, as described on page 185.

Grading assignments

This section describes how to grade assignments and leave feedback for students.

About the grading notifications

The main view of the portlet will flag any assignment that needs grading with an icon that looks like a calculator with an explanation point. Additionally, the **Status** column includes a notation of the number of students whose assignments that need grading.

When you navigate to the assignment overview, each student whose work needs grading is also marked with the calculator/exclamation-point icon and highlighted in yellow.

When you view the Student List, if any students have assignments that need grading, you will see the same yellow highlighting and calculator/exclamation-point icon.

Grading online assignments

In some cases, the system will can automatically grade an entire test, but you may want to do the following tasks manually:

- Adjust the scores given by the system. This is described in "Grading questions" on page 192.

- Give a student feedback on a question, as described in "Working with question-specific feedback" on page 193.

- Manually grade those questions that require it, such as essay questions. This is described in "Grading questions" on page 192.

- Manually change the score for an assignment, or for one attempt, as described in "Adding a bonus after a student takes a test" on page 195.

Grading questions

There are a handful of reasons to manually grade a question:

- All essay questions must be manually graded.

- Some short-answer questions must be manually graded.

- You may want to adjust a score that was given automatically by the system.

- You may want to adjust a score that you previously gave.

To grade a question:

1 Open the test for review, as described in "Reviewing online tests" on page 175.

2 Locate the question you want to grade. If the question is not already expanded, click **Expand question and response**.

   To the left of the question text, you should see the scoring icons — a green checkmark, a green-and-white checkmark, and a red x.
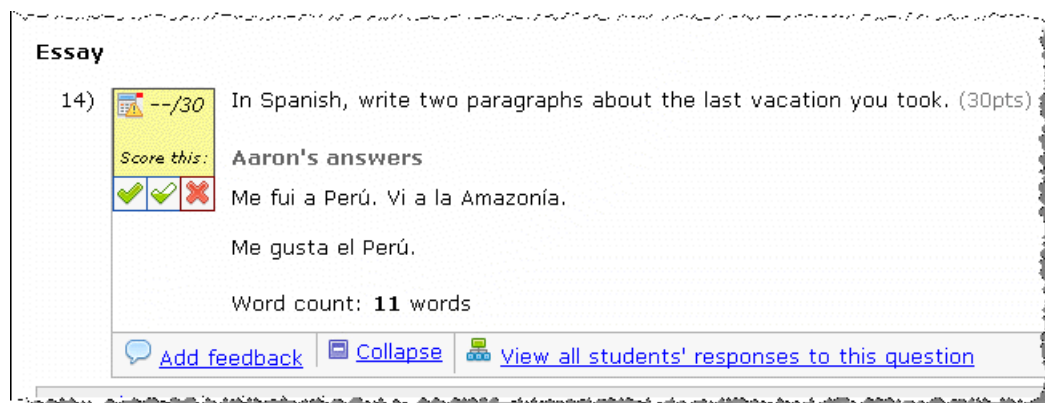
3 If you want to compare the student's response with other students' responses to this question (and optionally grade the others as well), click **View all students' responses to this question**.

4   To enter or adjust the score, click one of the scoring icons. For details on the scoring icons, see "About the scoring icons" on page 630.

Working with question-specific feedback

If desired, you can leave personalized feedback for a student regarding a particular question on the test. Note that for students to see your comments, the test must be set up so that review is allowed. (Allowing test review is described on page 78.)

Adding feedback

Use this procedure to add feedback about a student's response to a question.

To leave feedback about an answer:

1   Open the test for review, as described in "Reviewing online tests" on page 175.

2   Locate the question you want to leave feedback on. If the question is not already expanded, click **Expand question and response**.

3   Click **Add feedback**.
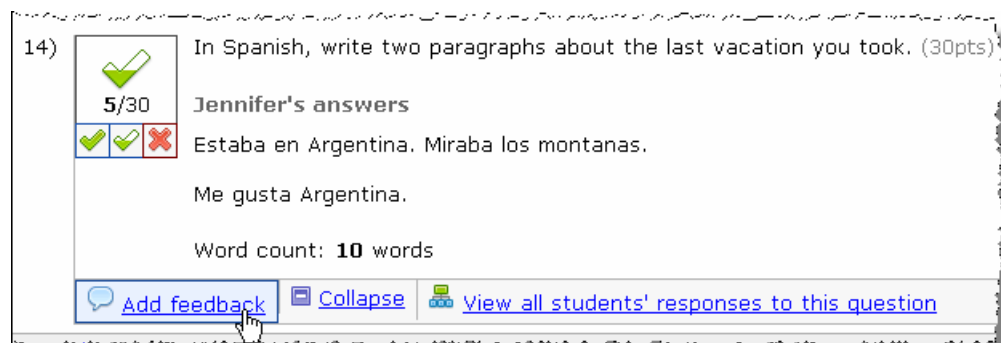
The system displays a pop-up editor.

4   Enter your comments. Note that the system will not attribute your remarks, so if more than one person has the ability to leave comments, you may want to include your name.

5   Click **Save**.

The system saves your comments, and the student will see the remarks when he or she is allowed to review the test.

When the student looks at the test, even if the question that you commented on is not expanded, the student can tell that feedback exists if there is a balloon icon next to the score for the question.
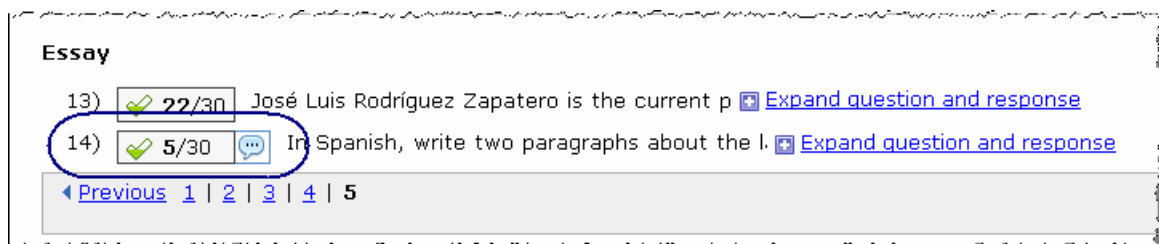
When the student expands the question and response, the full text of the comment is shown.
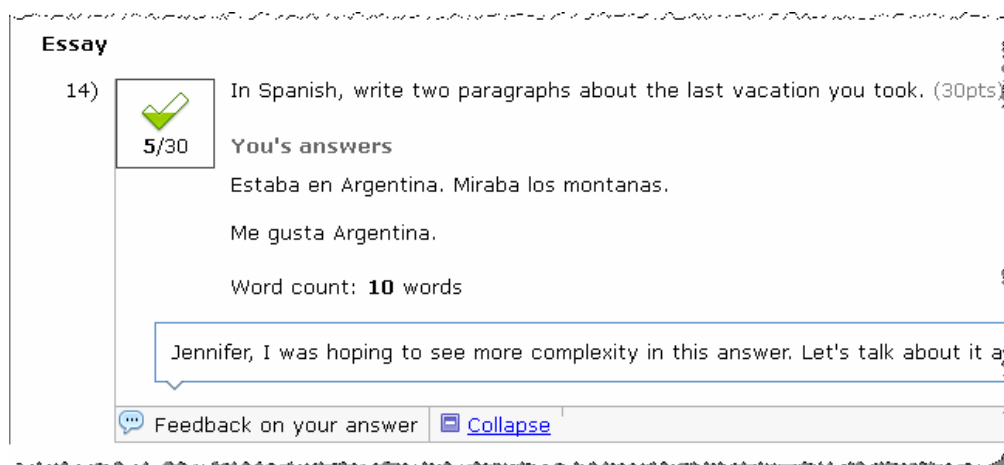
Removing or changing feedback

Use this procedure to remove or modify feedback on a question left by you or another authorized user.

To remove or change feedback:

1 Open the test for review, as described in

2   Locate the question with the feedback you want to remove or modify. If the question is not already expanded, click **Expand question and response**.

3   Click **Edit feedback**.
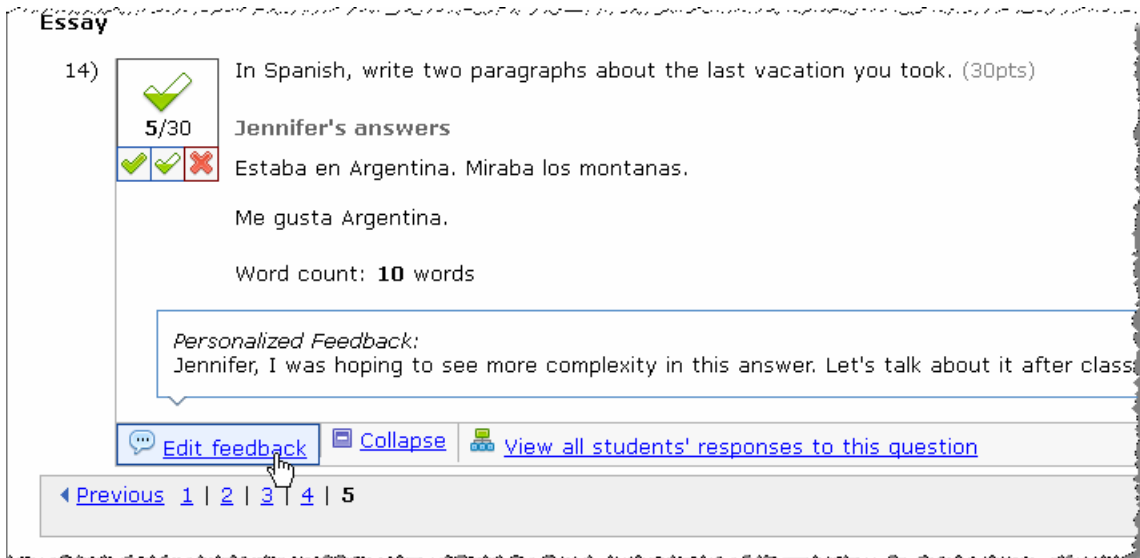
The system displays a pop-up editor that includes the feedback.

4   Do one of the following:

•   Edit the comments and click **Save**.

•   To delete the comment, click **Clear this feedback**.

Adjusting the score of a single-attempt test

If students were allowed only one attempt on a test, you can use these procedures to adjust their scores.

Adding a bonus after a student takes a test

If students were allowed only one attempt on a test, you can add points to their scores using this procedure. If desired, you can also give a negative bonus to reduce a student's score.

If you are working with an assignment that allowed multiple attempts, you will probably want to refer to . However, if you need to adjust a score of just one attempt that the student completed, you can do that using this procedure.

If you want to add an adjustment for the whole class — either a bonus or a reduction — see .

To add a bonus:

1 Open the student's test for review, as described in "Reviewing online tests" on page 175.

2 At the right of the screen, just above where the completed test is shown, you will see a link that says either **Add a bonus** or **Edit bonus**. Click whichever link is shown.

The system displays the **Bonus points** pop-up. If you previously adjusted the student's score, this pop-up will show the adjustment you made.

3 Do any of the following:

  • To give the student a bonus, enter the number of points to be added.

  • If you want to reduce the student's score, enter a minus sign followed by the appropriate number.
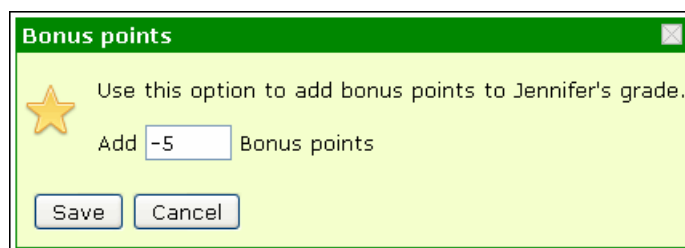
  • If you want to remove an adjustment that you previously made, clear the text field.

4 Click **Save**.

Adjusting the score if a student didn't take the test

If a student didn't take a test, the system will automatically give the student a zero. However, you can adjust this.

To give a score when a student didn't take the test:

1 Open the student's test for review, as described in "Reviewing online tests" on page 175.

2 Click the link that says **Change this grade**.
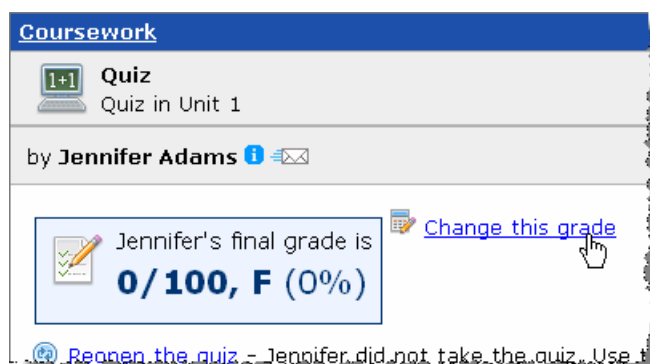
The system displays the grading icons.

3 To enter a score, click one of the scoring icons. For details on the scoring icons, see "About the scoring icons" on page 630.

Adjusting the final score when multiple attempts were allowed

You have a few options for adjusting a student's score on a test where multiple attempts were allowed:

- Manually entering a score for the assignment
- Changing the way retakes are weighted
- Adding or removing points from a student's final score

Note that the assignment has to be closed before you can do any of these things. That means either that the student has completed all attempts, the due date has passed, or the assignment has been manually closed (either by you, or by the student clicking the **Turn in** *assignment* button).

If you want to add an adjustment for the whole class — either a bonus or a reduction — see "Entering a class-wide adjustment" on page 202.

Manually entering a score for the assignment

If desired, you can ignore the scoring for the student's attempt(s) and just enter the overall score you think the student should have.

To enter a score for an assignment:

1 Navigate to the appropriate Student Assignment Details screen, as described on page 99.

2 Click the link labeled **final grade options**.

   The system displays a pop-up.

3 Select the radio button labeled **Set manually to**.

4 Enter a point value or a grade in the corresponding text box. (For details on what type of values you can enter, see "Values that can be entered" on page 630.)

5   Click **Save**.

Changing the way retakes are weighted

If a student took the test more than once, the overall grade typically will be determined by the settings you chose in the **Retakes** area of the screen you use to create and edit the assignment. (This field is described on .) However, if you want one student's grade to be calculated in a different way from the rest of the class, you can make changes using this procedure.

To change the way retakes are weighted for a particular student:

1   Navigate to the appropriate Student Assignment Details screen, as described on .

2   Click the link labeled **final grade options**.

The system displays a pop-up.

3   Specify how the grade should be calculated by choosing one of the following options:
   •   **average of all grades received**
   •   **highest grade received**
   •   **last grade received**

4   Click **Save**.

Adding or removing points from a student's final score

If you want to make an across-the-board adjustment to a student's score by adding points or subtracting points, use this procedure.

To add or remove points from a student's final score:

1   Navigate to the appropriate Student Assignment Details screen, as described on .

2   Click the link labeled **final grade options**.

The system displays a pop-up.

3   Select the checkbox labeled **Adjust the calculated final grade by** and enter a point value in the text box provided. Note that you can enter a negative value by using the minus sign.

If this checkbox is grayed out, that means that you already have manually given the student a grade — in this case you may want to simply adjust the grade that you previously entered (in the **Set manually to** field).

4   Click **Save**.

The system adjusts the score by the number that you specified.

Grading basic and uploaded assignments

This section describes how to enter grades for a basic or uploaded assignment. You can enter or modify grades using either of two methods:

- On the assignment overview — This method lets you enter grades for many students at once.

- On the Student Assignment Details screen — This method might be useful if you want to enter a comment along with the grade.

For help grading online assignments, see "Grading online assignments" on page 192.

Entering grades using the assignment overview

There are several advantages to entering grades on the assignment overview:

- You can enter grades for many students all on one screen.

- Even if you are entering just one student's grade, you can see other students' grades for comparison.

- If this is a basic assignment, you can give multiple students the same grade with just a few clicks.

When you enter grades, you will use either the scoring icons or enter values in text fields. For help with either of these scoring methods, see "Entering scores" on page 630.

To enter grades on the assignment overview:

1   Display the assignment overview, as described on page 96.

If you have not entered grades for your students, each student's name will be accompanied by grading icons, which you can use to enter scores.

If you have already given some students a score, those scores will be listed instead of the grading icons — but you can make the icons come back (and change the score) by hovering your cursor over the row that represents any student.

If you want to be able to manually type in each student's grade, you can click the **Edit all grades** link. When you do this, the system displays a text box next to each student's name. You can then manually enter or modify each grade.

Note that this screen includes tips on the permissible grade values that you can enter. You can also refer to for a list of guidelines.

2   Do one of the following:

- Enter the score(s) for each student using either the grading icons or by clicking **Edit all grades** and type in the grades. If you use the latter method, make sure to click the **Save Grades** button when you are done.

- If this is a basic assignment and you want to enter the same score for all students who do not currently have a score, click the **Enter a default grade** link to display a pop-up. Note that this option is displayed only if some students don't have scores yet. Enter the default grade and click **Fill Empty Grades** to apply this score to all students who don't currently have a score.

Entering a grade or feedback for a student

If appropriate, you can enter grades using the Student Assignment Details screen. One of the benefits of this approach is that it lets you first review comments that the student might have left.

You can also use this screen to leave comments of your own for the student.

To enter a grade or feedback for one student:

1   Navigate to the appropriate Student Assignment Details screen, as described on page 99.

2   To work with the student's grade, do one of the following as appropriate:

   • Use the scoring icons to enter the grade. For help using the scoring icons, see "About the scoring icons" on page 630.

   • If the student already has a grade, click **Change this grade** to display the scoring icons and make any necessary adjustments.

3   If you want to leave feedback for the student, click **Add a feedback comment** or **Add a feedback file** as appropriate. If you need further guidance on this, see "Working with personalized feedback" on page 204.

4   If you want to enter grades for other students on this same assignment, note that you can click the **Next** or **Previous** link next to the **Other students** label to display the Student Assignment Details screen for a different student.
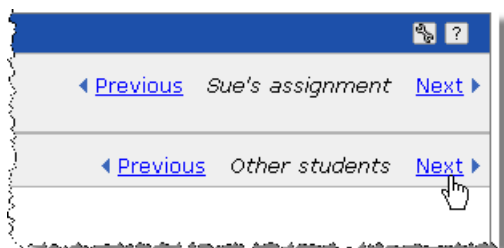
If you want to enter grades or feedback for other assignments that this student has completed, use the **Next** or **Previous** links next to the *StudentName's* **assignment** label.

Grading in summary view

If a particular student has several uploaded and basic assignments that need grading, you can enter these grades on one screen.

To grade in summary view:

1   Navigate to the Coursework portlet, as described on page 43.

2   In the pane at the upper left, click **Student List**.

The system displays the Student List.

3   Click any student's name to see a list of assignments that this student completed.

4   You can use the grading icons to assign or adjust a grade for any of the basic and uploaded assignments. For help with the grading icons, see "About the scoring icons" on page 630.

Working with class-wide grade adjustments

If desired, you can create a class-wide grade adjustment — either positive or negative.

Entering a class-wide adjustment

Use this procedure to give all students bonus points. If desired, you can also enter a negative bonus to reduce all students' scores.

To enter a grade adjustment for the entire class:

1   Navigate to the assignment overview, as described on page 96.

2   Click **More**.

3   In the pop-up menu, click **Give a class-wide bonus**.

The system displays a pop-up.

4   Enter a point value. To subtract points, use the minus key.

5   Click **Save**.

The system adjusts all grades in the class. A notice is added to the top of the assignment overview, indicating that an adjustment has been added. Students will see a similar message on their grade sheets.
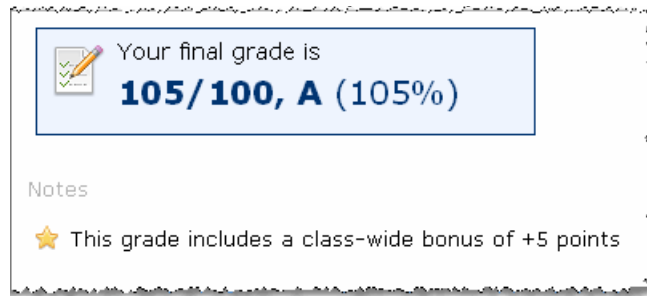
Modifying or deleting a class-wide grade adjustment

If you previously entered a class-wide adjustment, you can use this procedure to change or delete it.

To modify or delete a class-wide grade adjustment:

1   Navigate to the assignment overview, as described on page 96. This screen includes messaging that describes the adjustment.

2   Click the link labeled **class-wide bonus**.

The system displays the bonus pop-up.

3   Use the pop-up to modify the grade adjustment as appropriate. To remove the adjustment, clear the text field.

4   Click **Save**.

Working with personalized feedback

This section explains guidelines for entering feedback on the Student Assignment Details screen of any assignment, regardless of its format.

For help adding feedback for a particular question in an online test, see "Adding feedback" on page 193.

Entering a comment

Use this procedure to enter a comment on an assignment. The student will see the comment when he or she navigates to the Student Assignment Details screen for the assignment. Students can also enter comments for you, which display on your view of this screen.

To enter a comment:

1   Navigate to the Student Assignment Details screen, as described on page 99.

2   Click **Add a feedback comment**.

The system displays a pop-up editor.

3   Enter your comments.

4   Click **Save**.

The system saves your comments, and the student will see them when he or she next navigates to the Student Assignment Details screen for this assignment. Your name and the time you left the comments will be displayed as well.
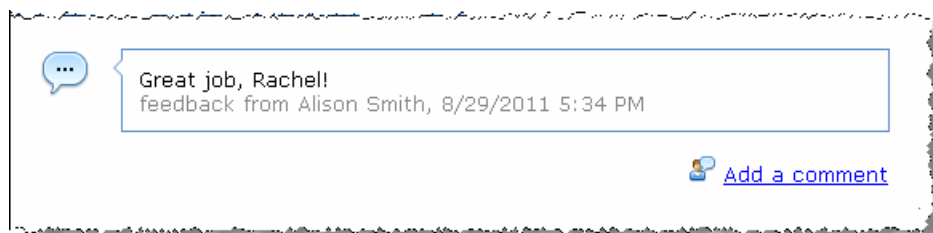
Other authorized users will be able to see your comments as well, but will not be able to modify them. (This differs from comments left in regard to a specific question on a test, which can be modified by another authorized user, if one exists.)

Adding a file

If desired, you can include a file as part of your feedback. For example, you may want to upload a file for the student's reference, or you may want to embed your comments in a file. The student will be able to download the feedback file from the Student Assignment Details screen.

To add a file:

1 Navigate to the Student Assignment Details screen, as described on .

2 Click **Add a feedback file**.

The system displays a pop-up.

3 Click the **Browse** button and follow the prompts in your browser to select a file.

4 If desired, enter a name in the **Label** column. This is the name that will be used to identify the feedback file on the screen. Note that you will not be able to change this once you finish uploading the file.

If you do not enter a label, then the name of the file will be used as a label in the Student Assignment Details screen.

5 Click **Save**.

The system adds the file to the Student Assignment Details screen. The student will see the file when he or she next navigates to the Student Assignment Details screen for this assignment. The system will also display your name and the time that you uploaded the file.

Modifying or deleting feedback

After you add feedback, you may want to do any of the following:

- Edit or delete your comments.

- Delete a feedback file.

To modify or delete feedback:

1 Navigate to the Student Assignment Details screen, as described on .

2 Do one of the following:

- To delete either a comment or a file, click the corresponding trash-barrel icon. The system will display a dialog asking if you are sure you want to delete the item. Click **OK**.

- To modify a comment, click the pencil icon to display a text editor with your comments. Make whatever changes are appropriate and click **Save**.

7

Viewing statistics about online tests

The Coursework portlet allows you to review detailed statistics about graded online assignments that three or more students have completed. You do this using a feature called Test Analysis.

In this chapter:

- Key concepts
- Understanding the main Analysis screen
- Navigating to the main Analysis screen
- Setting preferences for the course section

Key concepts

This section describes general concepts related to Test Analysis.

About Test Analysis

Test Analysis provides data on all graded online assignments after they are completed by three or more students. This feature is useful if you want to assess the effectiveness of an assignment and each of its questions, if you want to see which parts of the curriculum students struggled with, and other data along these lines.

Test Analysis provides:

- A snapshot of students' performance on the assignment.

- A summary of the relative difficulty of the assignment and each of its questions.

- An assessment of whether each question adequately distinguished between students who understood the material and those who did not.

- Analysis — using parameters that you set — about whether a question was too hard or too easy.

- Analysis of multiple-choice questions, including a look at the efficacy of distractors (the incorrect options within multiple-choice answer sets).

Key terms

This section defines key terms that you'll need to know in order to configure Test Analysis and understand the data the system generates.

Performance groups

Performance groups are categories that classify students as high, low, or midrange performers. Essentially, these groups are intended to represent those students who basically understood the material, those who didn't, and those who are in between.

The size of each performance group is a percentage of the total class size, and it is configurable. So, for example, if the high-performers group is defined as 10 percent, and 100 students complete the assignment, the high-performers group consists of the 10 students who did the best.

You manually define the size of the high- and low-performers groups using the **Performance Groups** tab. If you configure these two groups so that together they contain less than 100 percent of the entire class, the system creates and automatically determines the size of a middle-performers group. These size definitions are used throughout the course section (as opposed to a test-by-test basis).

The default sizes of the performance groups are:

- High — 25%

- Middle — 50%

- Low — 25%

Note that it is possible for students who got the same score to be organized into different performance groups. For example, suppose that your performance groups have the default sizes of 25%, 50%, and 25%. If 19 of 20 students who took the test got the same score, there would be students in the high-, middle, and low-performers groups who have the same score.

Difficulty rating

The **difficulty rating** is a number between 0 and 1 that reflects the percentage of students who answered the question incorrectly. The higher the difficulty rating, the harder the question was. You can configure the system to display a warning if any question is too easy (using the Low Difficulty Warning field) or too difficult (using the High Difficulty Warning field).

Discrimination index

The **discrimination index** is a number between -1 and 1 that tells you how effective a question was at distinguishing between high and low performers. The closer the number is to 1, the better the question was at making this distinction.

Technically, the discrimination index is the difference between the percentage of high performers who got a question right and the percentage of low performers who got it right. A negative discrimination index is problematic because it means that more low performers than high performers answered correctly.

Distractor performance

Distractors are the incorrect options offered as part of a multiple-choice question. The percentage of students who choose a particular distractor is its distractor performance. Possible values are between 0 and 99.

Ideally, you want a question's distractors to be chosen with equal, or close-to-equal, frequency. For this reason, you can configure the system to warn you if there is a large disparity among the distractor performances for the various incorrect options.

For example, suppose you set the Poor Distractor Performance Warning to 20 percent. In this case, if 10 percent of students chose the first distractor, and 50 percent chose another distractor, the system would display a warning.

Understanding the main Analysis screen

The Analysis screen is broken down into three sections:

- Summary Info — Provides statistics related to students' grades and the speed with which they completed the assignment.

- Charts — Displays a few snapshots related to students' grades and the difficulty of the assignment's questions.

- Item Analysis — Offers detailed analysis on the difficulty of each question.

Summary Info

The Summary Info area of the screen displays the data described below:

- **Total Students** — The total number of students who completed the assignment and received a score that was above zero.

- **Average Time Used** — The average length of time used by students to complete the assignment (based on students who scored above zero).

- **Fastest Time** — The fastest time a student used to complete the assignment. If the fastest score was achieved by only one student, the system includes a link to the **Student Assignment Detail** screen for that student.

- **Slowest Time** — The slowest time a student used to complete the assignment. If the slowest score was achieved by only one student, the system includes a link to the **Student Assignment Detail** screen for that student.

- **Average Score** — The average score, displayed both in percentage and in point form.

- **Median Score** — The score that is midway among all scores achieved. That is, the score for which there is an equal number of scores above and below. If there are an equal number of scores, then the median is the average of the two middle values.

- **Mode** — The score(s) that were most frequently achieved.

- **High Score** — The highest score. If the high score was achieved by only one student, the system includes a link to the **Student Assignment Detail** screen for that student.

- **Low Score** — The lowest score. If the low score was achieved by only one student, the system includes a link to the **Student Assignment Detail** screen for that student.

- **Score Distribution** — A graphic showing all scores for the assignment, along with the number of students who achieved each score.

Charts

The Charts area of the screen displays three types of charts:

- Letter Grade Distribution — Shows the number of students who received each letter grade. The system assigns letter grades using the values you set up in the Gradebook. For details, see "Letter grade configuration" on page 247.
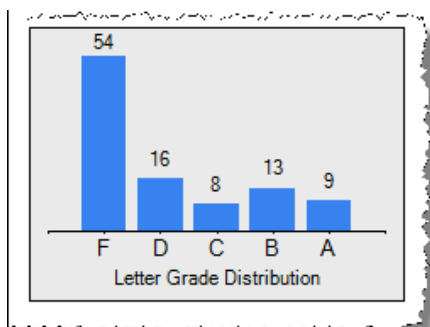
- Question Difficulty Distribution — Shows the number of questions in each difficulty range.
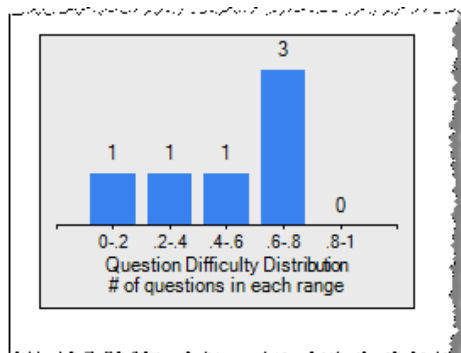
- Average Score by Performance Group — Shows the average score for each of the three performance groups.
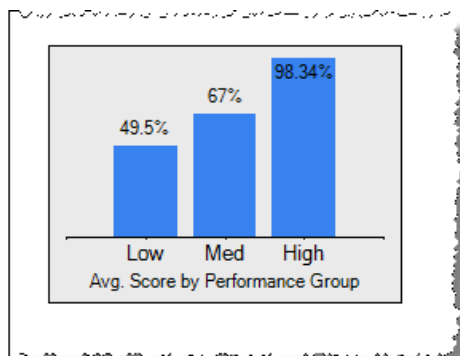
Item Analysis

The Item Analysis area of the screen analyzes the difficulty and discrimination index for the entire assignment, with details about each question. This section is divided into the following parts:

- Overall
- Grid View
- Question by Question

Overall

The overall section displays the following information:

- The average difficulty rating for the assignment overall.
- The average discrimination index for the assignment overall.
- A link to the page on which you can configure the size of the performance groups for the course section.
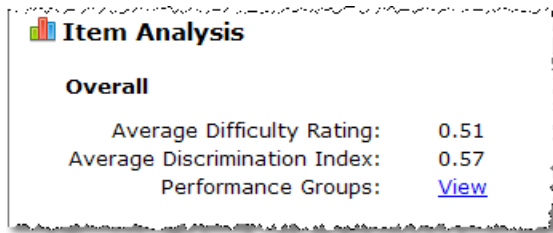
Grid View

The **Grid View** area of the Item Analysis section offers a summary of the key statistics on each question. For each question, it displays the following values:

- **Difficulty** — The question's difficulty rating.
- **Discrimination Index** — The question's discrimination index.
- **Average Score** — The average score achieved by students on the question.

If appropriate, the system displays a warning icon in this area. The warning icon is displayed if a question's difficulty, or some other parameter, exceeded the minimal level you configured for the

course section. (For details on these levels, see "Setting preferences for the course section" on page 215.)

Full Details

| Grid View | Question by Question |

Question Analysis

	Question	Difficulty	Discrimination Index	Average Score
	Q1 (OR)	0.74	0.52	2.60/10
⚠	Q2 (MC)	0.66	0.74	3.40/10
	Q3 (TF)	0.50	1.00	5.00/10
⚠	Q4 (ES)	0.19	0.21	40.18/50
	Q5 (SA)	0.22	0.37	7.80/10
	Q6 (MA)	0.74	0.56	2.56/10

Question by Question

The Question by Question offers more in-depth analysis. In this view, the system presents the full text of each question alongside a more detailed set of statistics. By default, some of the details are collapsed, but you can expand them by clicking the blue plus-sign icons.

| Grid View | Question by Question |

Question 1
Going from West to East order these U.S. Cities (Ordering)

Honolulu	29 (29%)
San Francisco	41 (41%)
Chicago	43 (43%)
Cleveland	26 (26%)
New York City	78 (78%)
Boston	26 (26%)

Question 1 Analysis

Difficulty Rating:	0.74
	High-Performers: **0.93**
	Middle Group: **0.86**
	Low-Performers: **0.40**
Discrimination Index:	**0.52** ✔ Good discrimination
Average Score:	**2.60/10** points
More Details:	➖ Collapse to hide details

Navigating to the main Analysis screen

You display the main Test Analysis screen in either of the following situations:

- If you want to review data about the assignment, as described "Understanding the main Analysis screen" on page 210.

- If you want to set general analysis preferences for the course section, as described in "Setting preferences for the course section" on page 215.

To navigate to the main Analysis screen:

1 If you haven't already done so, display the appropriate assignment overview by completing the following steps:

   a Display the appropriate Coursework portlet instance, as described in "Navigating to the Coursework portlet" on page 43.

   b Locate the assignment for which you want to view data.

   c Click the name of the assignment.

      The system displays the **Assignment Info** screen for that assignment.

2 On the **Assignment Info** screen, click the **Test Analysis** link, which is in the **Assignment Stats** area of the screen.
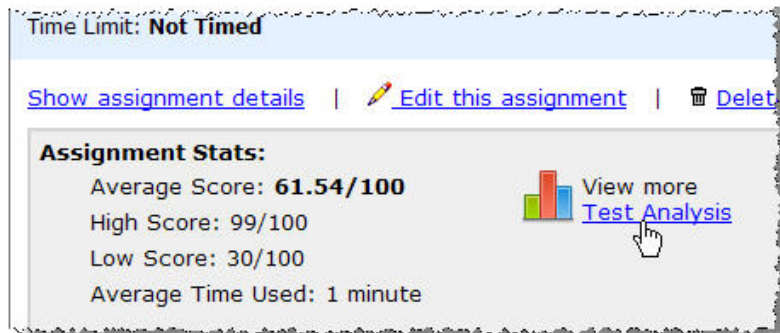
The system displays the Analysis data for that assignment.

3 Do one of the following:

   • If you need help understanding the information displayed on this screen, see "Understanding the main Analysis screen" on page 210.

   • If you want to set preferences, see "Setting preferences for the course section" on page 215.

Setting preferences for the course section

The Test Analysis feature provides you with statistics on high-performing students versus low-performing ones, and it also warns you about potential problems with your assignment. This section explains how you can customize this behavior.

Configuring warning settings

The Test Analysis feature warns you about potential problems with your assignment. For example, the system warns you if any of the following is true:

- If a question is too hard.

- If a question did not discriminate well between high- and low-performing students.

- If a distractor is not effective (multiple-choice questions only).

For more details on these concepts, see "Key terms" on page 208.

The way warnings are issued varies depending on preferences that you can set for your course section. Note that this procedure sets these preferences for your entire course section and all of its assignments, not just this one.

To configure warning settings:

1 Display the main Test Analysis screen for any online assignment, as described in "Navigating to the main Analysis screen" on page 214.

2 Locate the **Test Analysis Help** box. In that box, click the link labeled **Warning Settings**.
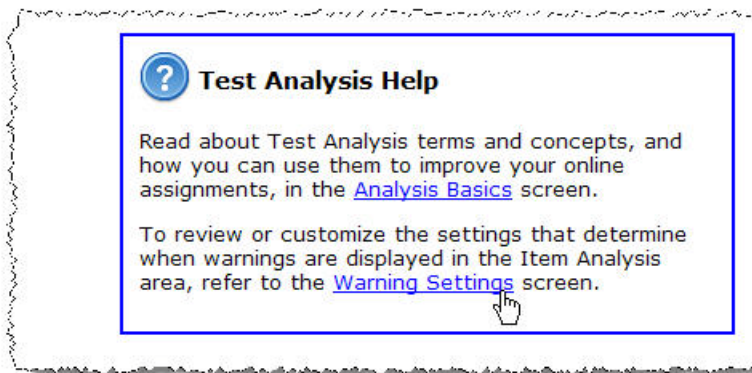
The system displays the **Warning Settings** tab.

3 Use the **Warning Settings** tab to change any of the following, as appropriate:

- The difficulty rating warnings
- The discrimination index warning
- The distractor performance warning

If you need to reset any of these values to their original default settings, click the link labeled **Reset to the default configuration for this course**.

Note that this screen includes links that take you to explanations for each of the terms used.

4 Click **Save**.

Configuring the size of performance groups

The system uses performance groups to categorize students into one of three groups — those that basically understood the material, those who didn't, and those in between. You manually define the size of the high- and low-performers group, and the system calculates the size of the middle group.

For more of an overview of what performance groups are, see .

Note that this procedure sets the size of these groups for your entire course section and all of its assignments, not just this one.

To configure the size of performance groups:

1 Display the main Test Analysis screen for any online assignment, as described in .

2 Scroll to the bottom of the screen. Locate the **Performance Groups** label and click the corresponding **View** link.
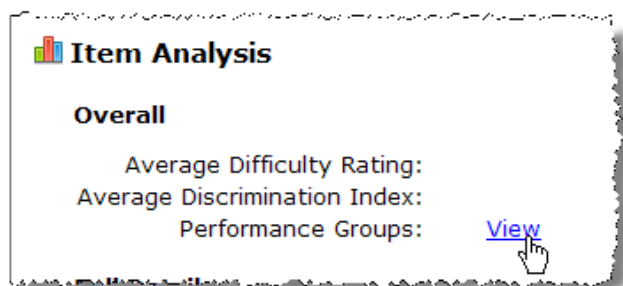
The system displays the **Performance Groups** tab. This tab displays data on the performance groups defined for your course context, along with details about students that completed this particular online assignment.

3 As appropriate, navigate to the area labeled **High Performers** or **Low Performers**, and click the link labeled **Edit Group Size**.

The system updates the screen to include a text field.

4 Enter the appropriate figure.

5 If you want this group to be the same size as its counterpart on the other end of the spectrum, select the checkbox labeled **Use this percent for the** *Low/High* **Performer group as well**.

If you need to reset the size of the performance groups to their original default settings, click the link labeled **Reset to the default configuration for this course**.

6 Click **Save**.

The system changes the size of the group and, if appropriate, the size of the other groups.

Part 2: Attendance

This section describes the Attendance portlet. Attendance is also described in .

In this section:

Attendance

8

Tracking attendance

You track each student's attendance using the Attendance portlet. This chapter describes how to configure and use this portlet.

In this chapter:

- Key concepts
- Navigating to the Attendance portlet
- Configuring the attendance marking method
- Working with warnings
- Working with sessions
- Working with attendance records
- Managing permissions

Key concepts

The Attendance portlet is used to track students' attendance. Data from the portlet is automatically imported into the Gradebook portlet, where you can use it to help determine students' midterm and final grades, if desired.

About the value of attendance

If you want attendance to affects students' midterm and final grades, you will make that configuration within the Gradebook portlet. For details, see "Working with the attendance evaluation" on page 254. Although that setup is not done here in the Attendance portlet, this section provides a brief overview of the Gradebook options, since it may be useful to understand them before setting up your Attendance portlet.

Giving attendance a value

You can configure your system so that attendance is equal to a specific value that will be used to determine the student's midterm and final grades. Depending on how you set up your Gradebook, this value could be a point value or a percentage of the total grade. With this system, you can penalize students for tardiness and unexcused absences.

Triggering automatic failure

In addition to — or instead of — the options described in "Giving attendance a value," you can set up your Gradebook so that students automatically fail the course after a certain number of unexcused absences. In this scenario, it doesn't matter how well the students do on any of their coursework. It also doesn't matter whether you set up attendance to have a relatively small value in relation to coursework (or any value). If students reach the limit of unexcused absences, they fail.

About sessions

Student attendance records are organized by **session**. A session is any scheduled meeting of the class. The Attendance portlet automatically includes a session for each regular class meeting (as determined by the schedule for the course section), and you can also manually add sessions. For example, you might manually add a session if you schedule a field trip or a review meeting outside the regular schedule.

If you have set up the course section so that attendance affects grades, note that by default, the credit that a student gets for attending a session is proportional to the duration of the session. However, you can manually increase a session's value by increasing the minutes that it is worth, without changing the scheduled start and end times.

For example, suppose your class meets once a week for an hour, and you have also scheduled a one-hour field trip. If you want the field trip to count for three times the regular class meeting, you can specify in the Attendance portlet that it is worth 360 minutes, even if it only is scheduled for one hour.

About the faculty view

The initial view of the Attendance portlet includes the following tools:

- A calendar, which you can use to locate existing sessions or create new ones.

- Details on the most recent session, with each student's record for that session. If you have not yet recorded attendance for that session, the system displays drop-down boxes that you can use to mark students present, absent, and so forth.

- Links to screens for adding and managing sessions.

- A link for displaying settings for the portlet instance.

- A link to a tool for exporting attendance data to Microsoft Excel.

About the student view

When a student displays the Attendance portlet, it shows details about that student's own attendance. Specifically, the system displays a short summary and a detailed list of the student's attendance history.

About the Attendance page

If you are using the default template for course contexts, the Attendance page is read-only. This means you cannot remove the Attendance portlet, nor can you add additional portlets to the page.

Navigating to the Attendance portlet

This procedure explains how to display the Attendance portlet. These steps assume that your school uses the default template for course contexts. If your school has customized the template, your Attendance portlet might be located elsewhere.

To navigate to the Attendance portlet:

1 Navigate to the appropriate course context, as described on .

2 In the left-hand pane, select the **Attendance** page.

The system displays the Attendance page, which hosts the Attendance portlet.

Configuring the attendance marking method

The Attendance portlet is ready to use out of the box. However, you can also fine-tune a few characteristics of it.

About the options

The attendance marking method determines the exact options that are available each time you record a student's attendance. By default, the system is set up to use the simplest attendance marking method (Whole Sessions).

Whole Sessions

The **Whole Sessions** option is the simplest setup option, and it also is the default choice. With this setup, you choose between the following options when recording a student's attendance:

- **Present**
- **Absent (Excused)**
- **Absent (Unexcused)**
- **Tardy**

As described in "Giving attendance a value" on page 222, when you set up your Gradebook, you can choose to give attendance a value. If you plan to do this, and if you choose the Whole Sessions marking method, note the following:

- The system will automatically reduce the student's total attendance credit if the student has one or more unexcused absences. The amount deducted is proportional to the number of unexcused absences.

- You can configure the system to treat a specific number of tardies as an unexcused absence. For example, three tardies might equal one unexcused absence. In this scenario, a student who is habitually late will not get full credit for attendance, even if he or she did show up for every session. If you don't use this option, students are not penalized for being late.

- You can configure the system to eliminate the student's attendance credit after he or she is marked **Absent (Unexcused)** a certain number of times.

By Hour and By Minute

With the **By Hour** and **By Minute** options, there are two steps to creating an attendance record.

First, you choose between the following options:

- **Present**
- **Absent (Excused)**
- **Absent (Unexcused)**

Next, if you choose **Present**, you have the option of specifying the exact amount of time the student actually was present (in hours or minutes as appropriate). In this scenario, if you want to reflect that a student was late, you mark him or her as present and then input the exact amount of time the student was present. Any minutes or hours missed in this manner are considered unexcused.

As described in "Giving attendance a value" on page 222, you can choose to give attendance a value within Gradebook. If you plan to do this, and if you choose the By Hour or By Minute method of tracking attendance, note the following:

- The system will automatically reduce the student's total attendance credit if the student is late, or if the student has one or more unexcused absences. The amount deducted is proportional to the total amount of time the student missed. (Excused absences do not count against the student, even though they show up as giving the student zero minutes/hours for the session.)

- You can configure the system to eliminate the student's attendance credit after he or she is absent for a certain number of minutes or hours. (Excused absences do not count against the student, even though they show up as giving the student zero minutes/hours for the session.)

Selecting an attendance marking method

This section describes how to configure the appropriate method for tracking students' attendance.

To configure the attendance marking method:

1   Display the settings screen:

    a   Navigate to the appropriate Attendance portlet instance, as described in "Navigating to the Attendance portlet" on page 224.

    b   Click the **Settings** link.

       The system displays the **Attendance - Notification and Attendance Method** screen.

2   Under **Attendance Marking Method,** select the appropriate option.

3   Scroll to the bottom of the screen and click **Save**.

Working with warnings

If desired, you can configure the system to send warnings if students have too many unexcused absences. You define how many are "too many" in the Attendance portlet's settings screen. These warnings can take any of the following forms:

- A message sent to the student via the Message Center.

- A message sent to you via the Message Center.

- A e-mail message sent to an account that you specify.

When you use this option, messages are automatically sent at the time that the student crosses the threshold of having too many unexcused absences. You can also resend warning notifications at any time to students who meet the warning condition.

Finally, within your own view of the Attendance portlet, on the **Weekly View** and **Most Recent Session** screens, you can configure the system to highlight in red those students who meet the warning conditions. The highlighting also shows up on the view of the most recent session (in the default view of the portlet)

Setting up attendance warnings

Use this procedure to create or modify attendance warnings.

To set up attendance warnings:

1   Display the settings screen:

    a   Navigate to the appropriate Attendance portlet instance, as described in "About the faculty view" on page 223.

    b   Click the **Settings** link.

        The system displays the **Attendance - Notification and Attendance Method** screen.

2   Scroll down to the area labeled **Notification**.

3   Set or modify the warning condition:

    a   Where the form says **Send a warning after:,** enter the desired values. Note that you can enter a specific number of unexcused absences or a percentage of the course.

    b   If the warning condition you chose in step a is for a certain number of unexcused absences, the system gives you the option of specifying that the absences be consecutive. As appropriate, select or de-select this checkbox.

4   Where the form says **Send the warning to:,** make sure all desired recipients are selected. Warnings that go to the student or faculty member are sent via the Message Center. Recipients in **Other**: text field must be e-mail addresses.

5   If you want your own view of the Attendance portlet to highlight those students who meet the warning condition, select the **Warning Highlight** checkbox. Doing this means that the system will highlight (in red) the names of the students who meet the warning condition. This

highlighting will occur in the **Weekly View** and the **Most Recent Session** screens. Note that this highlighting will not be displayed in the **View a Session** screen.

6   Click **Save**.

The system saves your changes and exits the **Attendance - Notification and Attendance Method** screen.

Resending warnings

At times you might want to resend a warning to a student or another party.

Note that if you want to modify the recipient list prior to resending warnings, you must first complete the steps described in "Setting up attendance warnings" on page 227. That is, you must make your changes on the settings screen, click **Save**, and then continue with the steps below.

To resend warnings:

1   Display the settings screen:

a   Navigate to the appropriate Attendance portlet instance, as described in "About the faculty view" on page 223.

b   Click the **Settings** link.

The system displays the **Attendance - Notification and Attendance Method** screen.

2   Scroll down to the area labeled **Notification**.

3   Where the screen says **Resend all warnings**, click **Send**.
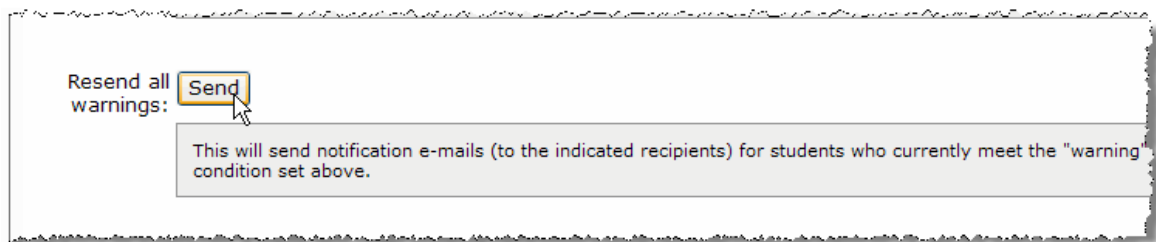
Highlighting students who have been absent

Within your own view of the Attendance portlet, you can configure the system to highlight in red those students who meet the warning conditions that you set up in "Setting up attendance warnings" on page 227. The highlighting also shows up in the details of the most recent session view (in the default view of the portlet).

To highlight students:

1 Display the settings screen:

   a Navigate to the appropriate Attendance portlet instance, as described in "About the faculty view" on page 223.

   b Click the **Settings** link.

     The system displays the **Attendance - Notification and Attendance Method** screen.

2 Scroll down to the area labeled **Notification**.

3 Select the **Warning Highlight** checkbox.

4 Click **Save**.

The system saves your changes and exits the **Attendance - Notification and Attendance Method** screen.

Now the system will highlight (in red) the names of the students who meet the warning condition.

This highlighting will occur in the **Weekly View** and the **Most Recent Session** screens. Note that this highlighting will not be displayed in the **View a Session** screen.

Working with sessions

At times, you might need to do any of the following:

- Mark a session as cancelled.

- Create a session.

- Modify a session by change its start or end time, adding a note to the calendar about it, and so forth.

This section describes how to complete all of these tasks.

About the options that define a session

When you create or modify a session, the system displays a form that contains the following fields:

- Start and End (Required)

- Minutes (Optional, for By Minute or By Hour tracking only)

- Notes field (Optional)

Start and End (Required)

Use these fields to establish the date, time and duration of the session.

Minutes (Optional, for By Minute or By Hour tracking only)

You can optionally use this field to configure the session to count for a value that is greater or less than its actual duration. Doing this is relevant only if both of the following are true:

- You are tracking attendance By Minute or By Hour.

- You have configured attendance to be able to affect students' grades in the Gradebook.

Notes field (Optional)

You can optionally use this field to enter any notes that you want to record about the session. These notes will be visible solely to you.

Displaying a list of currently defined sessions

Use this procedure to display a list of all the sessions currently defined for your course section.

To display a list of currently defined sessions:

1 Navigate to the appropriate Attendance portlet instance, as described in "About the faculty view" on page 223.

2 Click **Manage Sessions**.

The system displays the **Attendance - Manage Sessions** screen, which lists all the sessions currently defined for the course section.

Marking a session as cancelled

If you decide to cancel a class, you might want to mark the session as cancelled in the Attendance portlet. That is, if your system is configured to give students credit for attendance, you should cancel the class so that the system does not use it as part of the calculation of attendance credit.

To mark a session as cancelled:

1   Display the **Attendance - Manage Sessions** screen:

   a   Navigate to the appropriate Attendance portlet instance, as described in "About the faculty view" on page 223.

   b   Click **Manage Sessions**.

      The system displays the **Attendance - Manage Sessions** screen, which lists all the sessions currently defined for the course section.

2   Locate the session that you want to cancel. Use the corresponding drop-down list to mark it as one of the following:

   •   Cancelled
   •   Cancelled (Instructor Out)
   •   Cancelled (School Holiday)
   •   Cancelled (Rescheduled)

3   Scroll to the bottom of the screen and click **Save**.

Adding a session

If you want to manually add a session to your course section, use this procedure. This procedure also places the session on the calendar for the course, which all students can display within their MyPages context.

As an alternative to creating a session for which you can track attendance, you can simply add an event to the course calendar, as described in "Adding an event" on page 367. With that approach, you do not use the Attendance portlet, and you cannot track attendance to the event.

To add a session:

1   Navigate to the appropriate Attendance portlet instance, as described in "Navigating to the Attendance portlet" on page 224.

2   Click **Add a Session**.

   The system displays the **Attendance - Add/Edit a Session** screen.

3   Fill out the form as appropriate. For help with any of the fields, see "About the options that define a session" on page 230.

4   Click **Save**.

The system adds the session to the calendar.

Modifying a session

At times you might need to modify a session by changing its scheduled date or time.

If you track attendance by minute or by hour, and if your Gradebook is configured to give value to students' attendance, you also might want to change the value that it represents using the **Minutes** field.

Note that you can modify any session — including those that you create and those that are created automatically by the system as part of the regular schedule for the course section.

To modify a session:

1   Navigate to the appropriate Attendance portlet instance, as described in "Navigating to the Attendance portlet" on page 224.

2   Click **Manage Sessions**.

The system displays the **Attendance - Manage Sessions** screen.

3   Locate the session that you want to modify and click the corresponding pencil icon.

The system displays the **Add/Edit a Session** screen.

4   Fill out the form as appropriate. For help with any of the fields, see "About the options that define a session" on page 230.

5   Click **Save**.

The system adds the session to the calendar.

Deleting a session

If you want to delete a session that you have manually added, use this procedure.

Note that you cannot delete a session that is part of the regular schedule for the course section. If the session did not (or will not) occur, consider cancelling it instead, as described in "Marking a session as cancelled" on page 231.

To delete a session:

1   Navigate to the appropriate Attendance portlet instance, as described in "Navigating to the Attendance portlet" on page 224.

2   Click **Manage Sessions**.

The system displays the **Attendance - Manage Sessions** screen.

3   Locate the session that you want to modify and click the corresponding trash-barrel icon.

The system generates a dialog asking if you are sure you want to delete the session.

4   Click **OK**.

The system deletes the session.

Working with attendance records

This section describes the process of saving attendance records for each student.

Recording attendance by session

Use this procedure to record all your students' attendance for a specific session.

To record attendance by session:

1 Navigate to the appropriate Attendance portlet instance, as described in .

   The default view contains a form that lets you create attendance records for the most recent session.

2 If you want to record attendance for a session other than the most recent one, locate the appropriate session:

   a Click **Manage Sessions**.

      The system displays the **Attendance - Manage Sessions** screen, which lists all the sessions currently defined.

   b Locate the date of session for which you want to record attendance. Click the date, which should show up as a hyperlink.

      The system displays the **Attendance - View a Session** screen, which lets you mark each student's attendance.

   Another way of opening an older session is to click the date in the calendar that represents that session. Days that host sessions are colored blue.

3 For each student, do the following:

   a Set the drop-down list to the appropriate value:

      – Present
      – Absent (Excused)
      – Absent (Unexcused)
      – Tardy

      Note that the Tardy option is displayed only if you track attendance by whole session. (With other attendance marking methods, you mark the student as Present and then enter the exact amount of time the student was actually there.)

   b If your screen includes a **Minutes** or **Hours** column, you'll notice that for any students marked as absent, the system clears the Minutes or Hours field to zero.

      If the absence is excused, the system also deducts the total of possible time the student could attend. For example, suppose there 100 hours of class time, and the student has perfect attendance, except for one excused absence for one hour. In this case, the system represents the student's attendance record as 99/99.

4 Click **Save**.

The system updates the screen to show the choices you made.

If you want to mark attendance for the next scheduled session or for the previous one, you can use the links at the upper right portion of the portlet to navigate through the schedule.

Recording attendance by student

If you want to record a single student's attendance for multiple sessions, use this procedure.

To record attendance by student:

1   Navigate to the appropriate Attendance portlet instance.

2   In the initial view of the portlet, click the name of the student for whom you want to create attendance records.

The system displays the **Attendance > View a Student** screen.

3 Use the drop-down lists to set the student's attendance for as many sessions as appropriate.

Note that the Tardy option is displayed only if you track attendance by whole session. (With other attendance marking methods, you mark the student as Present and then enter the exact amount of time the student was actually there.)

4 Scroll to the bottom of the screen and click **Save**.

The system updates the screen to show the choices you made.

If you want to mark attendance for the next student or for the previous one, you can use the links at the upper right portion of the portlet to navigate through the course roster.

Modifying attendance records

Use this procedure to modify a attendance records that you previously created.

To modify an attendance record you previously created:

1 Navigate to the appropriate Attendance portlet instance.

2   Do one of the following:

- To modify a record in the most recent session, click **Edit saved entries**.

- To modify a record for an earlier session, complete the following steps:

    a   Click **Manage Sessions**.

    The system displays the **Attendance - Manage Sessions** screen, which lists all the sessions currently defined for the course section.

    b   Locate the date of the session for which you want to modify an attendance record. Click the date, which should show up as a hyperlink.

    The system displays the **Attendance - View a Session** screen.

    Another way of opening an older session is to click the date in the calendar that represents that session. Days that host sessions are colored blue.

    c   Click **Edit saved entries**.

3   For each student, modify the choices in the drop-down lists as appropriate.

4   Click **Save**.

The system updates the screen to show the changes you made. Note that selections that have a negative effect on students' grades are displayed in red.

Managing permissions

If you want to give another role permission to mark attendance, use this procedure.

To give another role permission to mark attendance:

1   Navigate to the appropriate Attendance portlet instance.

2   Click the wrench icon.

3   Click the **Permissions** tab.

4   Locate the role that you want to have permission to mark attendance. Make sure that the **Operations** checkbox is selected for that role.

5   Click **Save**.

If you want to revoke this role's permission later, just de-select the **Operations** checkbox.

Part 3: Gradebook

This section describes how to set up the Gradebook portlet, manage grades, and related tasks.

In this section:

9

Configuring the Gradebook

This chapter offers an overview of the Gradebook portlet and explains how to do basic setup tasks.

Other chapters that cover the Gradebook include Chapter 10, "Reviewing and adjusting grades," and Chapter 11, "Submitting grades to the ERP system."

In this chapter:

- Key concepts
- Navigating to the Gradebook
- Understanding the portlet layout and functions
- Working with evaluations
- Working with final grade weighting
- Working with letter grade configurations
- Managing permissions

Key concepts

For each course section, there is a unique instance of the Gradebook portlet, which you can use to view students' overall progress in the course, among other features.

How faculty use the Gradebook

For faculty members, the Gradebook is the place where you do the following:

- Specify whether the system should automatically calculate students' overall grades, using results from the Coursework and Attendance portlets.

- Optionally, create evaluations — items you define that can affect the student's overall grade.

- Configure a letter-grade scale (for example, defining an "A" as 90% to 100%) that will be used both for Coursework assignments and for final grades.

- Review and optionally adjust each student's automatically calculated course grade, or manually enter a grade.

- Enter personalized feedback for students regarding their work in the course.

- Depending on your school's configuration, submit midterm and final grades to the ERP system.

This chapter, and the next two chapters, cover these topics.

How students use the Gradebook

For students, the Gradebook is the place where they can review their overall grade throughout the term as it progresses, along with any personalized feedback you have entered. Students can also use the Gradebook portlet to leave comments for you.

Navigating to the Gradebook

The way you navigate to the Gradebook may vary if your school has customized the portal. The following steps describe how to navigate to the portlet using the system's default layout.

To navigate to the Gradebook portlet:

1   Log in to the portal.

2   Navigate to the appropriate course section:

    a   In the **Quick Links** area of the sidebar, expand the link labeled **My Courses**.

    b   Select the appropriate course section.
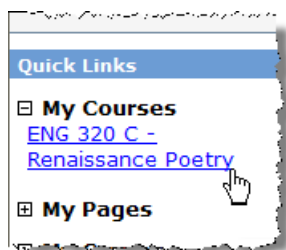
    The system displays the course context.

3   In the sidebar, click the **Gradebook** page button.

    The system displays the Gradebook portlet.

Understanding the portlet layout and functions

The Gradebook includes several screens that let you perform different tasks. This section offers a quick overview of each screen. Later sections talk about some of these screens in more detail.

Home screen

When you navigate to the Gradebook portlet, it displays a home screen that lists all enrolled students and non-roster students, along with students' grades so far, and links to other screens.

*If the course section exists only in the portal, the home screen will not show a **Submit your grades** link.*

Full Gradebook

The Full Gradebook screen lists all students, along with their grades for each assignment and each evaluation, and their overall grades in the course section so far.
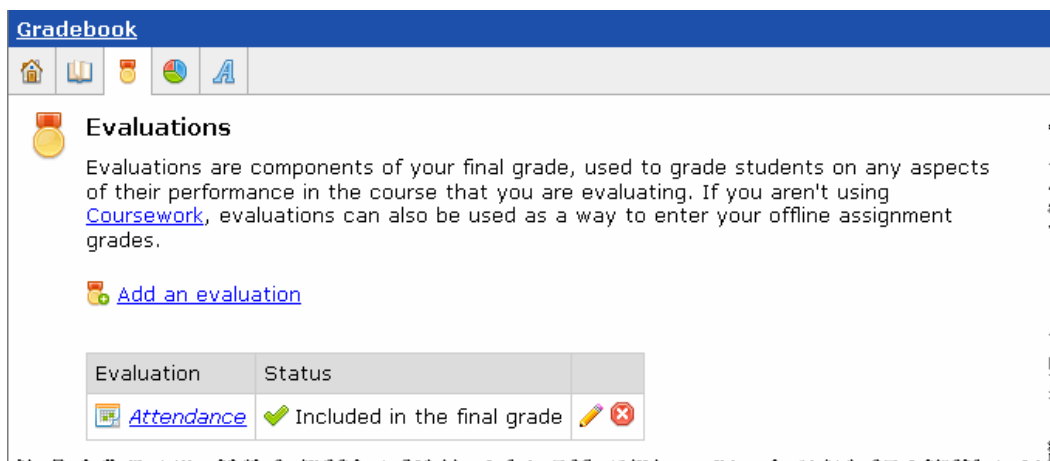
Note that if you have selected the Manual Method as your weighting method, you will not have a Full Gradebook screen.

The Full Gradebook is described in more detail in the next chapter, Chapter 10, "Reviewing and adjusting grades."

Evaluations

You can use the Evaluations tab to track any qualities or accomplishments that you expect from students. As part of this, you can make students' overall grades dependent on their evaluation scores — either in conjunction with Coursework scores, or in instead of them.

Additionally, if you want students' overall grades to be affected by attendance details that you enter in the Attendance portlet, you can use the Evaluations tab to include an attendance evaluation.

Note that if you have selecting the Manual Method as your weighting method, you will not have a Evaluations tab.

The Evaluations tab is described in more detail in "Working with evaluations" on page 248.

Final grade weighting

You use the Final Grade Weighting screen to manage how students' overall grades for the term are determined. You can choose to manually entering students' scores, or you can have the portlet automatically calculate grades, using any of several methods.

Weighting is covered in more detail in "Working with final grade weighting" on page 257.

Letter grade configuration

You use the Letter Grade Configuration screen to manage the definition for each of your letter grades (for example, an A could be defined as 90 to 100%, a B as 80 to 89%, and so on). There are several grading-scale options from which you can choose. You can also implement any of the pre-set scales and then make changes to it.
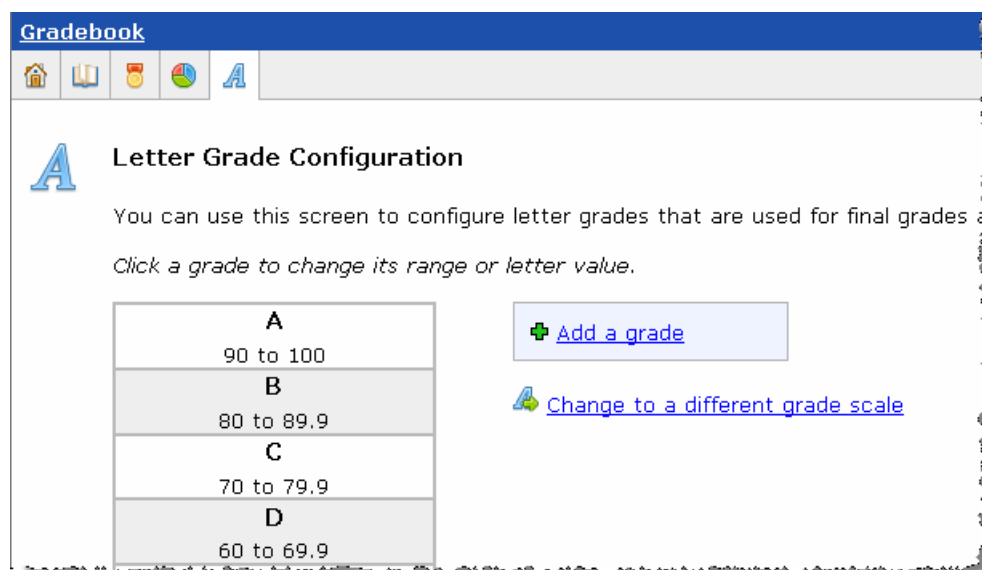
Working with letter-grade scales is covered further in "Working with final grade weighting" on page 257.

Submit your grades

The **Submit your grades** screen lets you send midterm and final grades to your school's ERP system. If you are teaching a course section that exists only in the portal, then your Gradebook will not have this feature.

For more details on submitting grades, see Chapter 11, "Submitting grades to the ERP system."

Working with evaluations

In addition to its other features, the Gradebook offers a method of tracking student performance — the **evaluation**.

You can create an evaluation to represent any quality or activity for which students should receive a score. Additionally, the portlet has a predefined attendance evaluation which, if you choose to use it, will automatically factor an attendance score into each student's grade. These two types of evaluations are described more in "About evaluations."

Evaluations can be used to supplement the Coursework assignments or as an alternative to them. For example, you may want to use evaluations to represent general factors, such as participation and attitude, that are distinct from any assignment. If the Coursework portlet is not being used at all, you may want to create evaluations to show the individual factors in the students' overall grades and, if desired, to automatically calculate final grades.

Evaluations are created and managed entirely within the Gradebook portlet.

If you want to delegate management of evaluations to other people, there are two permission levels that allow users to complete different actions with evaluations. For details, see "Managing permissions" on page 280.

About evaluations

This section describes evaluations in a bit more detail.

Types of evaluations

There are two types of evaluations:

- **The attendance evaluation** — This represents the student's attendance as recorded in the Attendance portlet for the course section. Each student's score is automatically calculated. There is only one attendance evaluation per course section, and it cannot be deleted – you either include it or remove it from your grading scheme.

- **Regular evaluations** — Regular evaluations – usually referred to just as "evaluations" – can represent any criteria that you want to define. For this type of evaluation, you manually give students a score. You can create as many regular evaluations as appropriate.

The attendance evaluation and regular evaluations share many characteristics, but there are also a few differences. These are described in "Attributes of an evaluation" on page 249.

If you do not track attendance through the Attendance portlet but want to have attendance affect the student's grade, you can create a regular evaluation and manually enter the appropriate score for each student.

Attributes of an evaluation

Evaluations have the attributes listed below.

As you review the features of evaluations, you may notice that you have fewer options than when you create a Coursework assignment. For example, evaluations do not have due dates. If you need more options than what an evaluation offers, consider creating an assignment that uses the basic format. Like evaluations, basic assignments can be used to measure performance on intangible accomplishments such as participation. For more details, see "Basic" on page 38.

Name

The name of the evaluation is used to identify it for both you and your students. The **Name** field is required.

Point value

The significance of an evaluation's point value varies depending on what weighting method you are using:

- If you use the Point Method for weighting, the point value determines the impact this evaluation will have in relation to any Coursework assignments that exist, and in relation to other evaluations.

- If you are using the Unit or Type Method for weighting, or one of certain Custom configurations, this value determines the impact the evaluation will in relation to other evaluations.

- Regardless of your weighting method, the point value provides a range that determines how precise you can be when giving partial credit. (For example, a point value of 100 lets you give a greater variety of scores than a value of 10.)

The **Point value** field is required.

Note that if you change the point value after having given a score to any student, those scores will be skewed. In general, it is a good practice to make a decision about an evaluation's point value prior to entering any scores.

Extra credit

If you select the **Extra credit** checkbox, the evaluation can only help the student in his or her overall course grade. Note that the attendance evaluation cannot be designated as extra credit.

By default, the **Extra credit** checkbox is not selected when you create a new evaluation.

Hidden

If you select the **Hidden** checkbox, the evaluation will not be shown to any student until he or she receives a score on it. Note that you cannot hide the attendance evaluation.
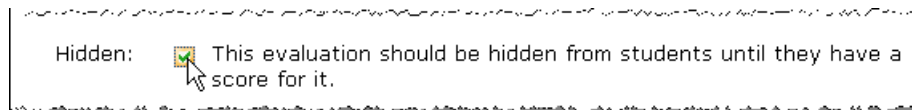
By default, the **Hidden** checkbox is not selected when you create a new evaluation.

Description

The **Description** field may be useful if you want to include details about the evaluation and how its scored. This field is optional.

Settings

The **Settings** label displays only for an attendance evaluation. These options allow you to do any of the following:

- Penalize a student who is habitually late. To do this, select the checkbox labeled **Count an unexcused absence for every [*number*] times tardy**, then enter the appropriate number.

- Give any student zero points for attendance after incurring a certain number of unexcused absences. To do this, select the checkbox labeled **No credit for attendance after [*number*] unexcused absences** and enter the appropriate number.

- Automatically fail the student after a certain number of unexcused absences. To do this, select the checkbox labeled **Automatic course failure (0%) after [*number*] unexcused absences**, then enter the appropriate number.

All three **Settings** fields are optional.
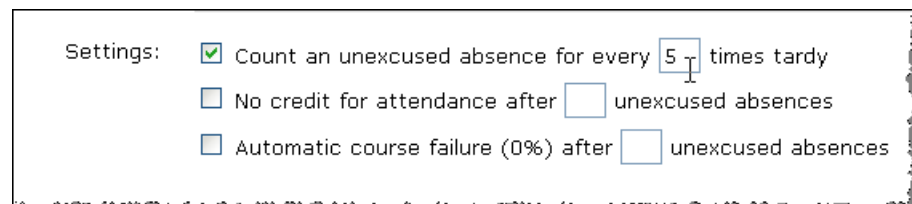
Navigating to the Evaluations screen

Before you can work with evaluations, you must navigate to the Evaluations screen.

To navigate to the Evaluations screen:

Do one of the following —

- If you are on the Gradebook home screen, click the link labeled **Evaluations**.
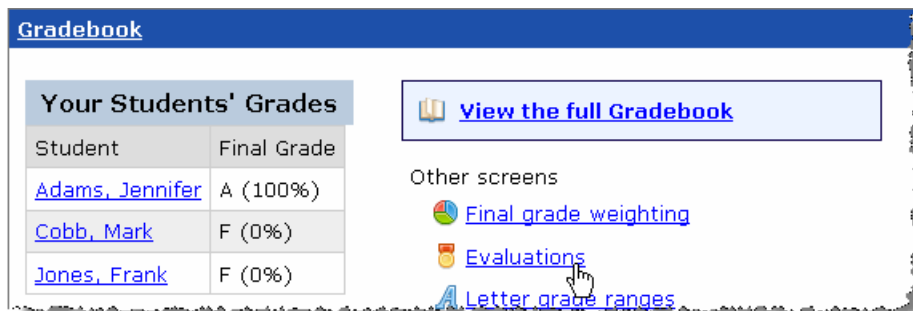
For help getting to the Gradebook home screen, see "Navigating to the Gradebook" on page 243.

- If you are already working in the Gradebook portlet instance but have navigated past the home screen, click the evaluations icon, which looks like a medal.

Working with regular evaluations

Use these procedures for working with any regular evaluation — that is, any evaluation except the attendance evaluation.

Adding an evaluation

Use this procedure to create a regular evaluation.

To add a regular evaluation:

1 Navigate to the Evaluations screen, as described in "Navigating to the Evaluations screen," above.

2 Click **Add an evaluation**.
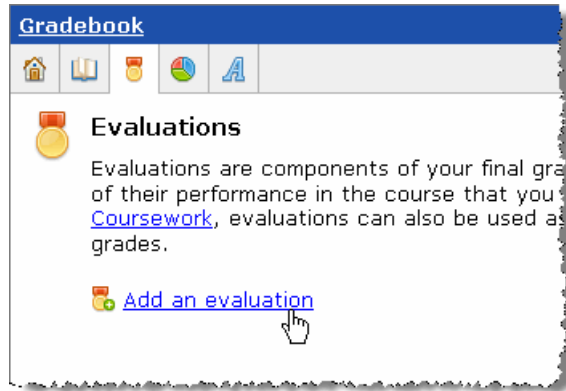
The system displays the **Add an Evaluation** screen.

3 Fill out the form as needed. If you need help with any particular field, see "Attributes of an evaluation" on page 249.

4 Click **Save**.

Entering scores for evaluations

If you have created a regular evaluation, you will need to manually enter a score for each student before the end of the term. Bear in mind that scores are immediately visible to students after being entered.

If you do not enter a score for an evaluation, then the system will ignore the item when it calculates the student's final grade.

For the attendance evaluation, you do not enter scores, because they are automatically determined by data that you enter in the Attendance portlet.

To enter or update scores for a regular evaluation:
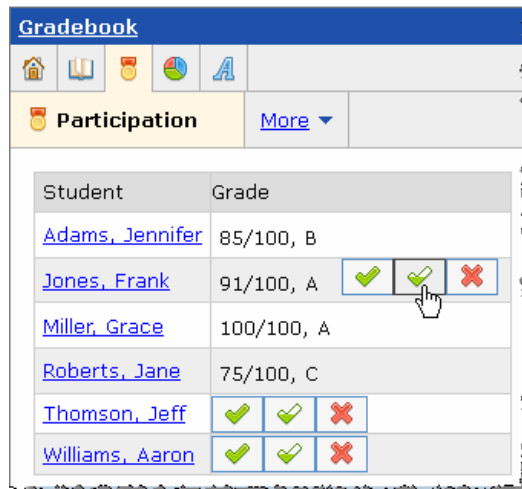
1 Navigate to the Evaluations screen, as described on page 251.

2 Click the name of the evaluation you want to work with.
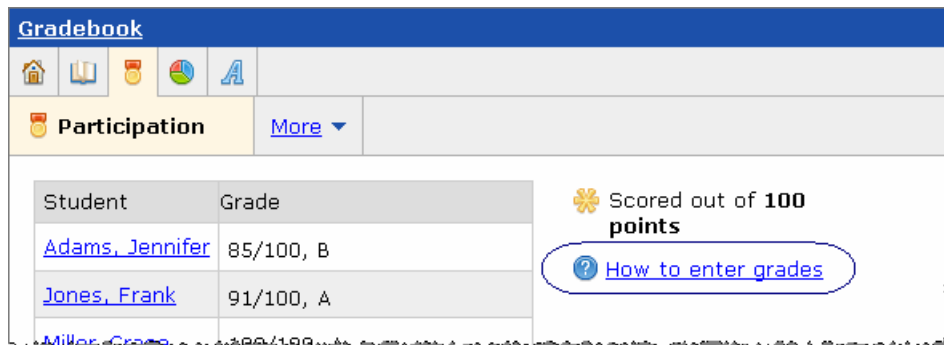
The system displays a screen that lists the students in the course. For each student, the system lists either the grade that you already entered, or a series of grading icons that you can use to enter a score.

If a grade has already been entered for any student, you can run your cursor along the right of the score to make the grading icons display.

3   For each student whose grade you need to enter (or change), use the scoring options to enter a grade. If you need help with the scoring icons, see "Entering scores" on page 630 or click the **How to enter grades** link.

Deleting an evaluation

Use this procedure to delete a regular evaluation. If you have entered any scores for the evaluation, those scores will also be deleted, and students' overall grades will be updated to reflect the change.

If you need details on deactivating the attendance evaluation, see "Including or removing the attendance evaluation" on page 254.

To delete an evaluation:

1   Navigate to the Evaluations screen, as described on page 251.

2   Locate the evaluation you want to delete and click the corresponding trash-barrel icon.

      The system displays a dialog asking if you're sure you want to delete the evaluation.

3   Click **OK**.

      The system removes the evaluation.

An alternate way of deleting an evaluation is available on the screen where you enter students' scores for the evaluation. Just select More > Delete this evaluation.

Working with the attendance evaluation

The attendance evaluation draws on data from the Attendance portlet to generate an attendance score for each student. The attendance evaluation exists in every course section, but you are not required to use it as a factor in students' overall grades.

Including or removing the attendance evaluation

The attendance evaluation is a bit different from other evaluations in that it cannot be deleted — rather, you can include and exclude it from students' grades.

By default, the attendance evaluation is worth 100 points. (To change this value, click the pencil icon and modify the **Point Value** field as appropriate, then click **Save**.)

To include or remove the attendance evaluation:

1   Do one of the following:

      •   If the course section is brand new, navigate to the Gradebook's home screen, as described on page 243. You will see a question asking whether you want attendance included in grades — click **Yes** or **No** as appropriate.
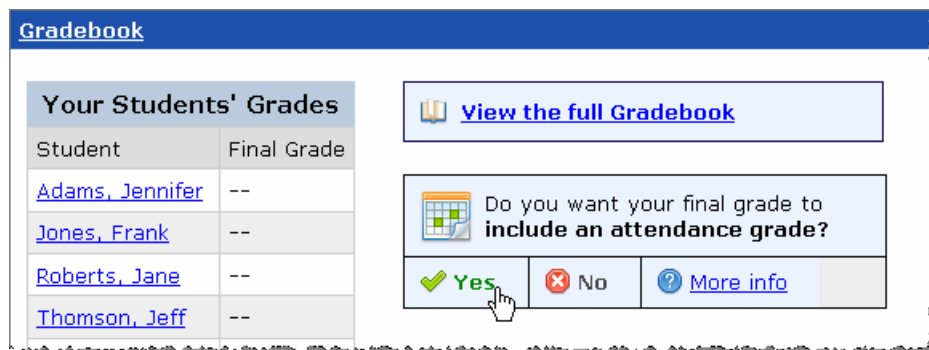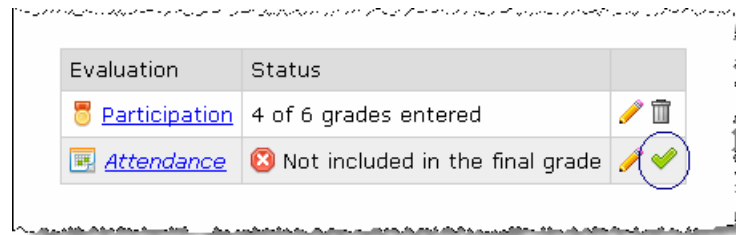
      •   If the course section is not brand new, you may need to navigate to the Evaluations screen (as described on page 251), to make this choice. The Evaluations screen includes a table

listing all evaluations that exist. For the attendance evaluation, this table's **Status** column includes one of the following:

— A green checkmark and a message stating **Included in the final grade**.

— A red X and a message stating **Not included in the final grade**.

In the column at the far right are controls that let you take actions. So if the attendance evaluation is currently *not* included, the actions area will include a green checkmark that, if clicked, will include the attendance evaluation.

In the column at the far right, do one of the following:

Click the green arrow to include the attendance evaluation.

Click the red X to remove the attendance evaluation.

The system includes or removes the attendance evaluation as appropriate. Depending on how you have configured your weighting and whether you have already entered details in the Attendance portlet, students' grades may be updated accordingly at this point.

Viewing students' attendance scores

If you are using attendance as part of your students' final grades, you may want to view students' attendance scores from time to time.

To view students' attendance scores:

1   Navigate to the Evaluations screen, as described on .

2   Click **Attendance**.
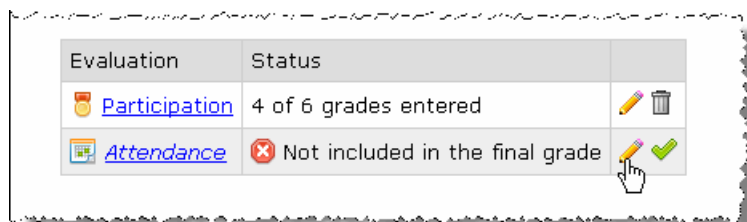
The system displays a screen listing students' attendance scores. Note that the scores cannot be changed on this screen. To change the student's attendance score, you have to change his or her attendance record. If you need to make any adjustments, click the student's name to see his or her details as recorded in the Attendance portlet.

Modifying an evaluation

At times you might want to make changes to an evaluation. For a summary of the values that can be changed, see .

To modify an evaluation:

1   Navigate to the Evaluations screen, as described on page 251.

2   Click the pencil icon next to the evaluation that you want to change.

The system opens a screen that lists details about the evaluation.

3   Make any changes that are appropriate.

4   Click **Save**.

An alternate way of opening an evaluation for editing is available from the screen where you enter or view students' scores for the evaluation. Just click More > Edit this evaluation.

Copying evaluations

If you want to copy evaluations from one course section to another, you can do this by copying all Gradebook settings using the Copy Course Materials portlet (described in Chapter 31, "Copying course materials"). Note that with this approach you copy not just evaluations, but also all Coursework assignments, all Gradebook settings, and all Attendance settings. With this selection, the material from the source overwrites the material in the target.

Working with final grade weighting

A key feature of the Gradebook is that it can calculate students' midterm and final grades. The way the Gradebook does this depends on the weighting method you choose.

If you want to delegate management of final grade weighting to other people, you can do this using the Content management access permission. For details, see "Managing permissions" on page 280.

About the weighting methods

The various weighting methods are described in the following table. Note that with some methods, you just select the method and then you are done. With others, there is some additional configuration to do after you select the method.

Name	Description	Additional configuration?
The Point Method	All items are weighted according to their point values. This is the default method. For Coursework assignments, the point values are set in the Coursework portlet. For Gradebook evaluations, point values are set on the Gradebook's evaluations tab.	No
The Unit Method	All Coursework units are weighted equally. Within each unit, items are weighted according to their point values. If you have created one or more evaluations, all evaluations are treated like a single unit. Within that unit, individual evaluations are weighted according to their point values.	Not generally, although you may choose to customize weighting within one or more units, using an exception feature.
The Type Method	You manually enter a weight for each type, and a weight for all your evaluations, which are treated as a single type. Within each type, all assignments are weighted equally. Individual evaluations are weighted according to their point values.	Yes
The Manual Method	There is no automatic grade calculation — instead, you manually enter each student's grade.	No, but you do have to manually enter grades.
A Custom Method	This method allows you to weight assignments using a number of different methods.	Yes

How is extra credit handled?

If you choose a weighting method that includes units or types, and if you plan to have extra-credit assignments, you may want to review this section for details of how these assignments will be weighted.

A unit or that contains both required and extra credit assignments

If a unit (or type) is associated with both required assignments and extra-credit assignments, within the grade sheet view, the weight of the extra-credit item will be determined by both the weight of the group and the weight of the item.

For example, suppose you have two units, one worth 90% and one worth 10%. Each unit includes an extra-credit assignment worth 10%, and the student gets full credit for both extra-credit assignments. The extra-credit assignment belonging to the first unit will give the student 9 percentage points of extra credit. The assignment belonging to the second unit will the give the student 1 extra-credit percentage point.

A unit or type that consists only of extra-credit assignments

That is, if all of the assignments within a unit — or all assignment of a certain type — happen to be set up as being for extra-credit, then that unit (or type) will be clearly labeled as being for extra credit within the Gradebook. Further, you can give that group a weight, as well as giving an individual weight to each item.

So, suppose a unit contains three extra-credit items, and that unit is worth 10% of the final grade. In this scenario, if the student completes any number of extra-credit assignments, his or her score on that assignment will scale to as much as 10% in bonus points. However, note that the student does not have to complete all three assignments to get the 10% extra credit.

For example:

- If the student completes and gets full credit (100%) on *one* assignment only, the student will get the full 10% extra credit.

- If the student completes two assignments, scoring 80% and 100%, the student will give 9% extra credit.

- If the student completes all three assignments, scoring 80%, 90%, and 100%, the student will give 9% extra credit.

Navigating to the weighting screen

Before you can configure your weighting method, you must navigate to the Final Grade Weighting screen.

To navigate to the Final Grade Weighting screen:

Do one of the following —

- If you are on the Gradebook home screen, click the link labeled **Final grade weighting**.
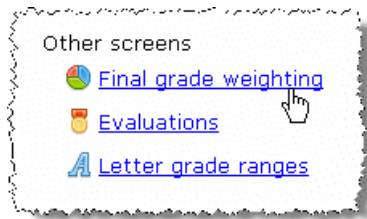
  For help getting to the Gradebook home screen, see "Navigating to the Gradebook" on page 243.

- If you are already working in the Gradebook portlet instance but have navigated past the home screen, click the Final Grade Weighting screen, which looks like a pie chart.
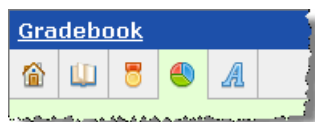
Selecting a weighting method

This section explains how to choose a weighting method. For details about the different options, see "About the weighting methods" on page 257.

To select a weighting method:

1 Navigate to the Final Grade Weighting screen, as described above (in "Navigating to the weighting screen").

   The system displays the Final Grade Weighting screen. If you previously selected a weighting method, or copied one using the Copy Course Materials feature, the system displays details about that choice here. Otherwise, the system shows the default choice, which is the Point Method.

2 Click **Change weighting method**.

   The system displays the **Final Grade Weighting: Weighting Method** screen, which lists each of the five weighting methods. A checkmark is displayed next to the method that you are currently using.

3　Click the name of the method you want to use.

The system automatically saves your selection.

If you chose the Type Method or a Custom Method, you still have some additional choices to make. See ,"or , as appropriate.

With the Custom Method, if you do not immediately configure the method, the system will select a particular Custom Method on your behalf (**Manual types with point-based assignment weights**). The next time you return to the **Final Grade Weighting** screen, the system will prompt you to enter weights based on that configuration, but you can also change to a different custom method at that point.

If you chose the Unit Method, you're not required to do any additional configuration, though you are able to manually customize the weights within any particular unit, if appropriate. For details, see .

Weighting with the Type Method

With the Type Method, you assign a percentage weight to each type. This is the main thing you have to do before the configuration is complete and grades can be calculated.

Within each type, all assignments are weighted equally, though you can change this for any particular type, if appropriate.

To assign weights using the Type Method:

1   If you haven't already, select the Type Method using the steps described in "Selecting a weighting method" on page 259.

2   Navigate to the Final Grade Weighting screen. (For help with this, refer to page 259 — or, if you are still on the screen where you chose the Type Method, click the link labeled **Back to the Final Grade Weighting screen**.)
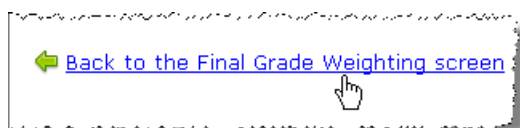
The Final Grade Weighting screen lists all of the types that you have defined for the course section, along with the percentage weights that you have assigned to them, if any.

If there is one or more type that needs a weight, that type is highlighted in yellow.

3   For each type, enter the appropriate percentage in the corresponding text box.

The system automatically saves each value you enter and, with each entry, updates the total displayed at the bottom of the **Weight** column.

4   If you finish weighting your types, and you failed to make the weights add up to 100 percent, the system displays a warning message. If this happens, correct the numbers before navigating away from this screen. If you fail to do this, the system will discard all the values that you entered. Once the values equal 100 percent, the system adds a Save changes button to the screen.

5   Click **Save changes**.

By default, within each type, assignments are weighted equally, but you can change this for any given type. For details, see "Customizing weighting within a group" on page 266.

Weighting with the Custom Method

This section describes how to configure a custom weighting method.

About the questions

To create a Custom Method, you start by answering three questions, which are described below.

Question 1: Assignment Grouping

The first question is: Should assignments be grouped? Note that if you have evaluations, and if you select **By Unit** or **By Type**, all evaluations are treated like a single unit or type.

Choice	Description
By Unit	Choose one of these options if you want the Gradebook to consider the assignment's unit or type when calculating the grade. For example, you might want one unit or type to have greater weight than the others.
By Type	
All Together	Choose this option if, for grading purposes, you want the Gradebook to essentially ignore each assignment's unit and type.

Question 2: Group Weighting

You answer Question 2 only if you answered **By Unit** or **By Type** to Question 1. Question 2 asks how you want each unit or type weighted in relation to one another. Note that if you have evaluations, all evaluations are treated like a single unit or type.

Choice	Description
All Equally	The system automatically calculates the weight of each unit or type, making them all equal, regardless of how many assignments or points are associated with each.
Manually	You enter the exact weight of each unit or type.

Question 3: Assignment Weighting

This question determines how each assignment and evaluation will be weighted.

Choice	Description
All Equally	The exact result varies depending on how you answered Question 1: • If you are answered By Unit or By Type to Question 1, then within each group, all items are weighted equally. • If you answered All Together, then all assignments and evaluations in the course are weighted equally.
By Point Value	The system weights items by their point values.
Manually	With this option, you enter the exact weight of each item.

Configuring the Custom Method

Use this procedure to configure your Custom Method.

To configure your Custom Method:

1 Navigate to the Custom Method configuration screen by doing one of the following:

   • If you are still on the screen where you selected the Custom Method, click the link labeled **Configure your custom method**.
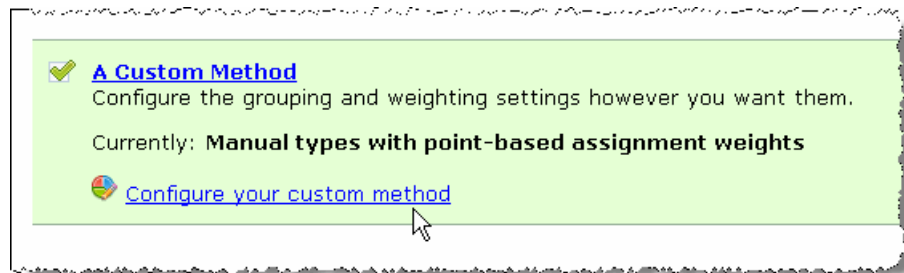
   • If you have moved to a different part of the Gradebook, navigate back to the Final Grade Weighting screen, as described on . Click **Change weighting method** and then **Configure your custom method**.

   The system displays the Custom Method configuration screen.

2   Answer the questions as appropriate. If you need help with any of the questions, see "About the questions" on page 263.

Once you have answered all the questions, the screen updates to show options for saving the method or clearing the screen to start over.

3   Click **Use this method** to save and implement your choices.

4   If your Custom Method does not require any manual weighting, then you are done. If your method *does* require some manual weighting, click the link labeled **Back to the Final Grade Weighting screen**. This screen will include messaging that tells you what needs to be weighted.

5   If there are weights to be saved here on this screen, there will be a text box in the Weight column. In this case, enter the appropriate values and click **Save changes**.

6   If you have grouped assignments by unit or by type, you still may have items to weight. If this is the case, the system will display a message stating this, and it will apply yellow highlighting to any group that contains items needing attention.

7   Click the name of any group whose items need manual weighting. On the resulting page, enter the appropriate weights and click **Save changes**.

If you chose to group assignments by unit or by type, generally each group's items are weighted using the same rule (for example, all equally, by points, or manually). However, you can customize the way assignments within any particular unit or type are weighted. For details, see "Customizing weighting within a group," below.

Customizing weighting within a group

If you are using a weighting method that assigns specific weights to units or types, then in general, within each group the same method of weighting is applied (for example, all assignment are weighted equally, by points, or manually). However, within any unit or type, and within the evaluations category, you can customize the way weighting is handled.

To customize the weighting of items within one group, or to remove a customization:

1   Navigate to the Final Grade Weighting screen, as described above (in "Navigating to the weighting screen").

The system displays the Final Grade Weighting screen, which identifies your currently selected Weighting Method and lists any groups that have a particular weight.

2   Select the name of the group whose weighting you want to customize.

The system displays a screen that shows the group's items and their current weights.

At the top of the screen is a message explaining how the items are weighted.

This message also says one of the following, depending on whether you have already modified the weighting:

- "If these assignments should be handled differently, you can make an exception **here**."
- "You can change or remove this exception **here**."

3 Click **here**.

The system displays a pop-up. The bulleted list shows alternate ways you could manage these weights.

4 Select one of the options listed.
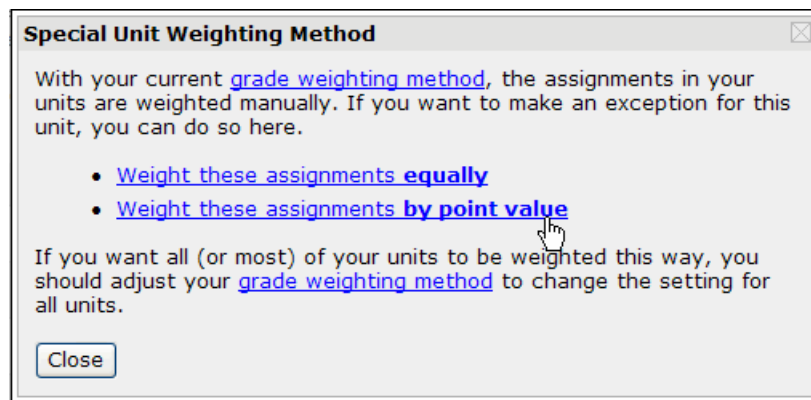
*If you decide that you want to change your entire weighting method, you can click **grade weighting method** to go to the screen that lets you make that change.*

If you chose to weight the assignments equally or by point value, there is nothing further to do on this screen.

5 If you chose to weight the assignments manually, the screen updates to include text boxes for you to fill in weights. After you have filled in the weights as appropriate, click **Save changes**.

Reviewing and changing weights

This section explains how to review and make changes to your weighting setup.

Reviewing weights

If you want to go back and review your weighting choices, navigate to the Final Grade Weighting screen, as described on page 259.

This screen shows the following information:

- The weighting method that you're currently using.

- Some or all of your current weights. If you weight using units or by types, the weight for each group is shown here, and you can also click the name of any group to see how items within that group are weighted. Otherwise, all items and their weights are listed on the Final Grade Weighting screen.

Changing weights

At times you may want to make any of the following changes:

- Changing the way that a specific unit, type, assignment, or evaluation is weighted.

- Changing the weighting method used by the course.

Changing the way an item is weighted

There are a few ways to modify a specific item's weight.

To change the way specific items are weighted:

1   Go to the appropriate screen, as described in "Reviewing weights" on page 268.

2   Do one of the following:

- If the item you want to change is manually weighted, the system displays its current weight in a modifiable text box. Make any changes necessary. In response, the system adds a **Save Changes** button to the screen. Select this button to implement your changes.

- If you want to change the way that weights are handled within a particular unit, type, or within the evaluations category, see "Customizing weighting within a group" on page 266.
- If you are using the Custom Method, and you want to fine-tune any aspect of it, refer to "Configuring the Custom Method" on page 264.

Changing the weighting method

If at any time you want to change the weighting method used by a course, navigate to the Final Grade Weighting screen (as described on page 259) and click the **Change weighting method** link. For further guidance, see "Selecting a weighting method" on page 259.

You may want to be cautious about changing the weighting method in the following situations:

- If the term has already started, and students have been turning in work — tweaking the weighting could confuse students if they see changes in their grades.

- If you've spent a lot of time configuring your weighting and are not sure you want to change — be aware that your original choices may not be saved if you decide you want to revert back to the old method. In that case, you might have to spend time reconfiguring your original weighting method.

Automatically dropping low grades

With most weighting methods, you have to the option of configuring the system to automatically drop low grades. The options for doing this vary depending on which weighting method you are using:

- With all weighting methods except the Manual Method, you can set up the system to automatically drop the lowest grade(s) from the full list of each student's scores, as described in "From the full list of assignments," below.

- With the Unit Method, the Type Method, and some Custom Methods, you can also set up the system to automatically drop the lowest grade(s) from one or more units or types, or from a group of evaluations, as described in "From the full list of assignments," below.

By default, the system is set up to count all grades.

You can also manually review a students list of scores and drop any score as appropriate. For details, see "Dropping or reinstating a score for an assignment" on page 292.

From the full list of assignments

Use these steps to configure the system to drop the lowest grade(s) from the full list of each student's scores. You can configure the system to drop anywhere from single lowest grade to the five lowest.

Note that you cannot do this is if you are using the Manual Method of weighting (because that weighting method does not consider these scores).

To automatically drop the lowest grade(s) from the full list of assignments and evaluations:

1 Navigate to the Final Grade Weighting screen, as described on page 259.

2 Scroll to the bottom of the screen.

3 Under the **Dropping Assignment** label, select the checkbox.

4 Set the drop-down list to the number of scores you want dropped for each student.

Your choices are automatically saved.
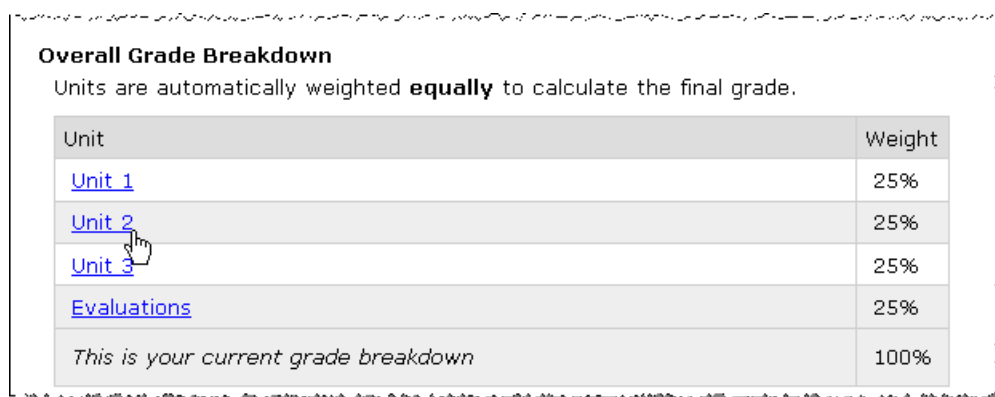
From a single unit or type

With some weighting methods, you can configure the system to drop the lowest grade(s) within a certain unit, or of a certain type, or from within the full list of evaluations. This is an option if you are using the Unit Method, the Type Method, or if you are using a Custom Method that groups assignments by unit or by type.

To drop grades from a single unit or type:

1 Navigate to the Final Grade Weighting screen, as described on .

   If you are using the Unit Method, the Type Method, or a Custom Method that weights units or types, this screen will list each group along with its weight.

2 Click the name of the appropriate group.

   The system displays a screen that lists the items in this group.

3 Scroll to the bottom of the screen.

4 Under the **Dropping Assignment** label, select the checkbox.

5 Set the drop-down list to the number of scores you want dropped for each student.

   Your choices are automatically saved.

Working with letter grade configurations

For each course section, you use a single grading scale. This scale determines both the type of grade that students will get (such as "A" or "B," and "Pass" or "Fail") and the specific grade that will be given to each student based on the credit that he or she earns.

The scale is used for:

- All graded assignments (created in the Coursework portlet).

- All evaluations (created in the Evaluations portlet).

- The student's overall work in the course (that is, the student's midterm and final grades).

You select from a list of existing grading scales, which you can then modify as needed. The list you choose from includes scales that are installed with e-Racer, and those scales currently used by your other course sections (note that only current courses are listed — not past or future courses).

If you want to delegate management of letter grade configuration to other people, you can do this using the Content management access permission. For details, see "Managing permissions" on page 280.

Available grading scales

The following table describes the grading scales that you can select from. For each course section, you can implement any one of these scales and then modify it as appropriate.

Scale	Description
Portal **default grade scale**	Choosing this option means you'll use whichever scale has been defined as the default by the portal administrator.
Basic ABCDF	A 90 to 100 (percent) B 80 to 89.9 C 70 to 79.9 D 60 to 69.9 F 0 to 59.9

Scale	Description
ABCDF with + / -	A 93 to 100 (percent) A- 90 to 92.9 B+ 87 to 89.9 B 83 to 86.9 B- 80 to 82.9 C+ 77 to 79.9 C 73 to 76.9 C- 70 to 72.9 D + 67 to 69.9 D 63 to 66.9 D - 60 to 62.9 F 0 to 59.9
Pass / Fail	Pass 60 to 100 (percent) Fail 0 to 59.9
Other course section	Choosing the name of another course section means that section's scale will be used in the section you're currently configuring. Note that subsequent changes you make to the first course section's scale will *not* be dynamically brought into the second course section — so you may want to finish refining the scale before you begin using it in other courses.

How scales are saved and reused

You cannot modify the scales that are installed with e-Racer, with one exception — it is possible for your portal administrator to make changes to the *Portal* **default grade scale**. This change is managed through the Site Manager menu, which is available only to members of the Administrators role.

While you can make changes to any scale that you select for your course section, there is no option of saving that scale in a library or a list — however, if you want to reuse an older scale, you can copy that course's Gradebook using e-Racer's Copy Course Materials feature. This feature is described in Chapter 31, "Copying course materials." Note that when you copy the Gradebook, you copy all of its settings and its evaluations, and the Gradebook in the target course is overwritten with the choices being copied.

Navigating to the Letter Grade Configuration screen

Before you can work with a grading scale, you navigate to the Letter Grade Configuration screen.

To navigate to the Letter Grade Configuration screen:

Do one of the following —

- If you are on the Gradebook home screen, click the link labeled **Letter grade ranges**.
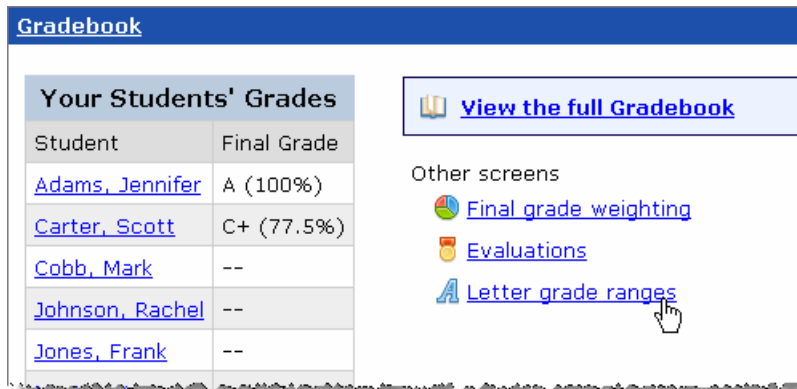
For help getting to the Gradebook home screen, see "Navigating to the Gradebook" on page 243.

- If you are already working in the Gradebook portlet instance but have navigated past the home screen, click the letter-grade configuration tab.

Implementing a grading scale

To implement a grading scale that is predefined by the system, or one that's used in another of your course sections, use this procedure.

Be aware there is no preview feature or staging area for grading scales. The process is: you choose a scale, and the system implements it automatically in the course section. When you make changes to it, any changes you make are immediately seen.

To implement a grading scale:

1 If you are not already viewing the Letter Grade Configuration screen, display the screen as described in "Navigating to the Letter Grade Configuration screen," above.

2   Click the link labeled **Change to a different grade scale**.
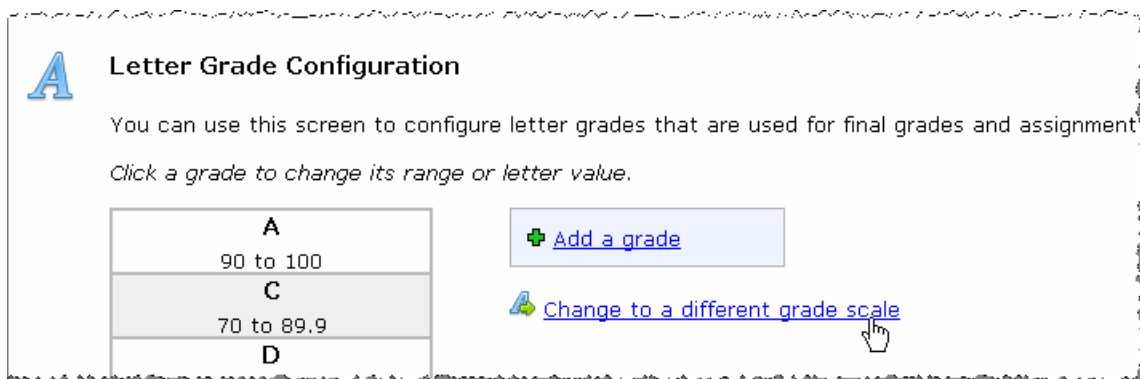
The system displays a pop-up dialog box that includes a drop-down list.

3   Use the drop-down list to select the scale you want to implement. Note that the drop-down always lists *Portal* **default grade scale** first, even if that is not the scale that was last selected or which is currently in use.

If you need details on any scale listed, refer to "Available grading scales" on page 272.
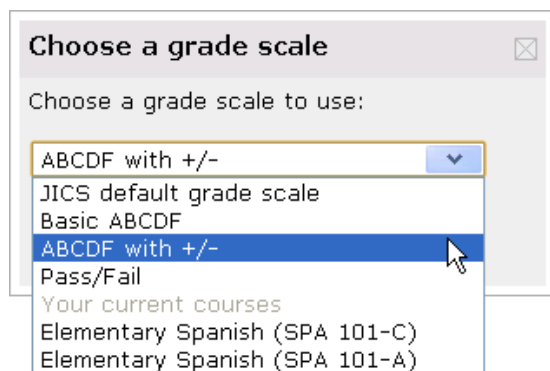
4   After you select a scale, click the button labeled **Use this grade scale**.

The system displays a dialog stating that if you proceed, any changes you have made to the currently used scale will be lost.

5   Click **OK**.

The system implements the scale you chose and displays details about the scale on the Letter Grade Configuration screen.

6   If you want to make changes to this scale, see "Modifying a grading scale."

Modifying a grading scale

After you have implemented a grading scale, you may want to make any of the following adjustments:

- Adding a grade to the scale
- Modifying an existing grade
- Deleting a grade

Be aware there is no preview feature or staging area for grading scales. The process is: you choose a scale, and the system implements it automatically in the course section. When you make changes to it, any changes you make are immediately seen.

Adding a grade to the scale

If you want to add a grade to a scale you have implemented, complete the following steps.

To add a grade to a scale:

1 If you are not already viewing the Letter Grade Configuration screen, display the screen as described in "How scales are saved and reused" on page 273.

2 Click **Add a grade**.

The system displays a pop-up form.

3 Enter a name in the **New grade name** field.

4 In the second field, enter the low-end percentage of this grade's range. (For the top end of the range, the system will automatically use the number that goes up to the next-highest grade on the scale.)

5 Click **Save**.

The system adds your grade, and adjusts the next-lowest grade on the scale accordingly.

Modifying an existing grade

If you want to modify an existing grade — by changing its name or its percentage range — complete these steps.

To change an existing grade in a scale:

1 Navigate to the letter grade configuration screen, as described on .

2 Click the grade you want to modify.
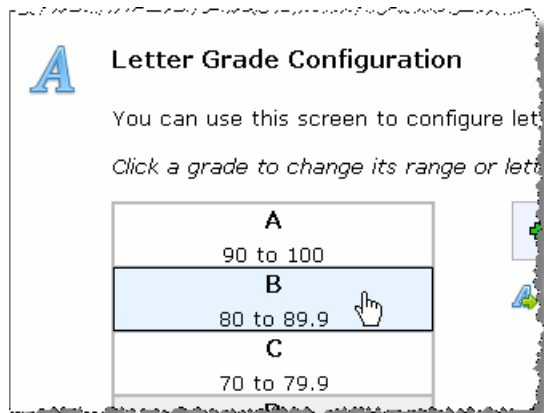
The system displays the **Edit a grade** pop-up, which lets you change the name of the grade and the low-end percentage of this grade's range.

3 Make any changes that are appropriate.
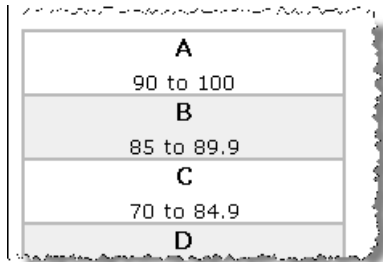
4   Click **Save**.

The system modifies the grade. If you modified the range of this grade, the system updates the range for the next-lowest grade on the scale appropriately.
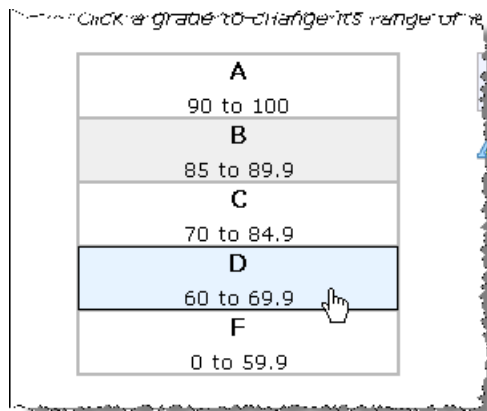
Deleting a grade

When you delete a grade, the system automatically assigns that grade's percentage range to the next-lowest grade. So, for example, if you are using the **Basic ABCDF** scale and you delete the D, the system will automatically extend the F grade's range up to 69.9 percent.

To delete a grade from a scale:

1   Navigate to the letter grade configuration screen, as described on .
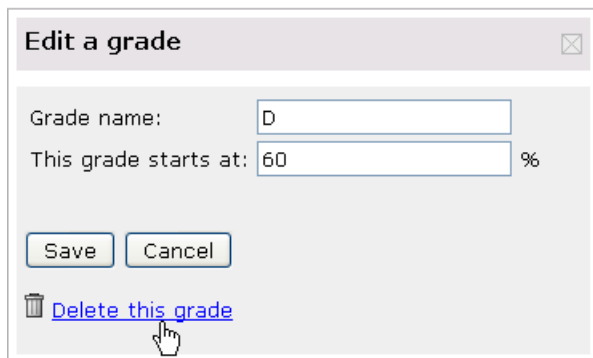
Click the grade you want to delete.

The system displays the **Edit a grade** pop-up, which lets you make changes or delete the grade.

2   Click **Delete this grade**.
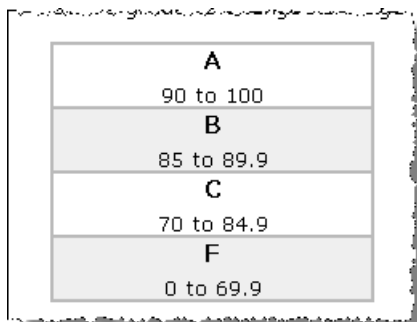
The system displays a dialog asking if you're sure you want to delete the grade.

3   Click **OK**.

The system removes the grade and adjusts the next-lowest grade in the scale accordingly.

Managing permissions

By default, only members of the Administrators and Faculty roles have permission to manage grades in the Gradebook. If you have created a custom role — for example, a TA role — and you want its members to have permission to work with grades, you must manually give them permission.

Available permissions

This section lists the available Gradebook permissions.

These permissions are not intended to be used by students in the course section (enrolled students or non-roster students). If you try to give a Gradebook permission to one of these students, the permission will not be honored.

Content management access

This permission lets the user do the following:

- On the Evaluations screen —

  - Create and modify evaluations (but not enter scores for them).
  - Include or exclude the attendance evaluation, and adjust its value and settings.

- On the Final Grade Weighting screen —

  - Change the weighting method, and make exceptions to the way weighting is handled within a single unit or type.
  - Manually weight items.
  - Configure the system to drop the lowest grade from the course as a whole, or from one group (from a unit, a type, or from the list of evaluations).

- On the letter grade scale tab, change the letter grade scale being used by the course section, add grades, and so forth.

Note that when this user displays the Gradebook portlet, the user will not see the home screen. The Evaluations tab will display.
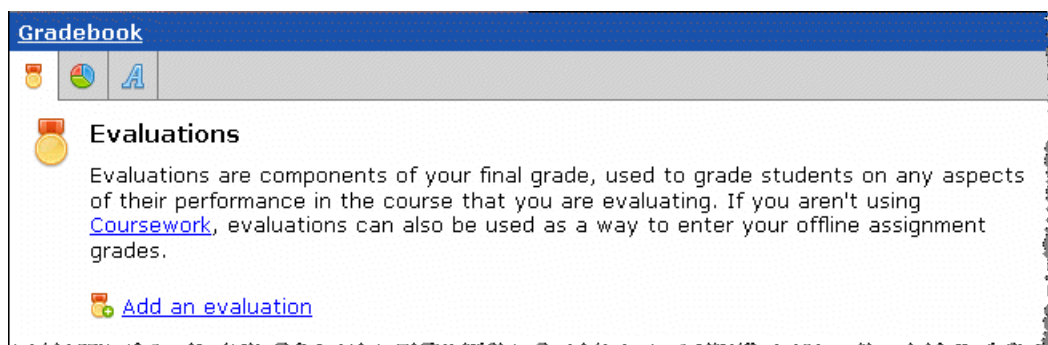
Grading access

This permission lets the user do the following:

- On the Full Gradebook screen —

  - Add feedback comments and files
  - Add extra credit
  - Drop grades on the grade sheet
  - Export grades to an Excel spreadsheet

- On the Evaluations screen, this user can grade evaluations.

When this user displays the Gradebook portlet, the user will see the home screen, along with options for displaying the Full Gradebook and the Evaluations screen.
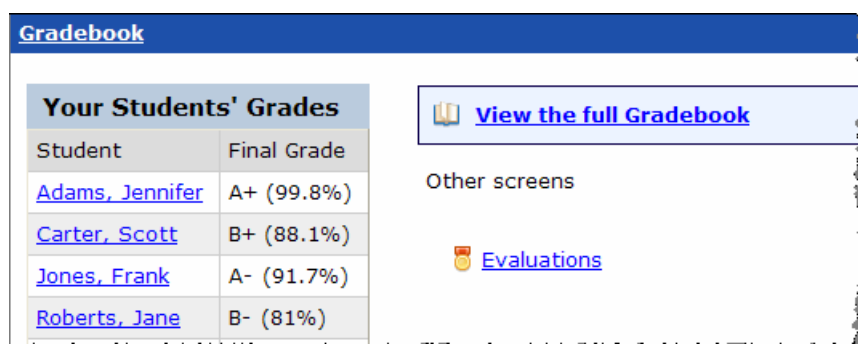
Giving a role a permission

Use this procedure to give a role a Gradebook permission. Make sure that you have also given the role permission to view the Gradebook page, as well as any other pages in the course that they'll need to view.

Users who have Gradebook permissions — but no other affiliation with the course — will not see the course section in their My Courses lists. These users should be instructed to bookmark the pages they'll need to access, or told how to navigate to the appropriate page.

To give a role permission to a Gradebook permission:

1 If you haven't already done so, display the Coursework portlet instance for the appropriate course section, as described in .

2 Click the wrench icon.

   The system displays the **Customize Portlet Gradebook** screen, with the **Preferences** tab selected.

3 Click the **Permissions** tab.

   The system displays the **Permissions** screen.

4   Locate the role that should be allowed to manage the Gradebook. Select the corresponding checkbox in the **Can Administer Gradebook** column.

5   Click **Save**.

10

Reviewing and adjusting grades

After students begin participating in the course, you may want to review their overall grades for the course, adjust their grades, or enter feedback for them. This chapter explains how to complete these tasks.

In this chapter:

Key concepts

This chapter deals mainly with the concept of reviewing students' overall grades during the term, making adjustments, and entering feedback.

If you want to delegate responsibility for the tasks described in this chapter, you can do this using the Grading access permission. For details, see "Managing permissions" on page 280.

Navigating to the Full Gradebook

To see a summary of how all students are currently doing in the course, you view the Full Gradebook.

To navigate to the Full Gradebook:

Do one of the following —

- If you are on the Gradebook home screen, click **View the full Gradebook**. (For help getting to the Gradebook home screen, see "Navigating to the Gradebook" on page 243.)
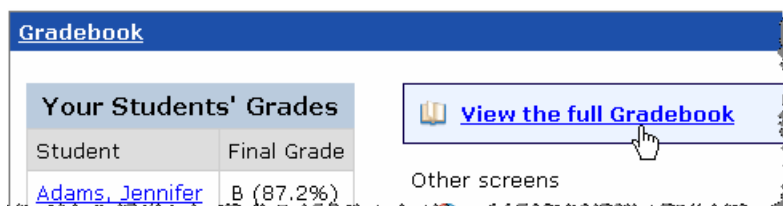
- If you are already working in the Gradebook portlet instance but have navigated past the home screen, click the evaluations icon, which looks like an open notebook.
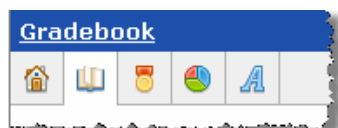
Reviewing students' grades
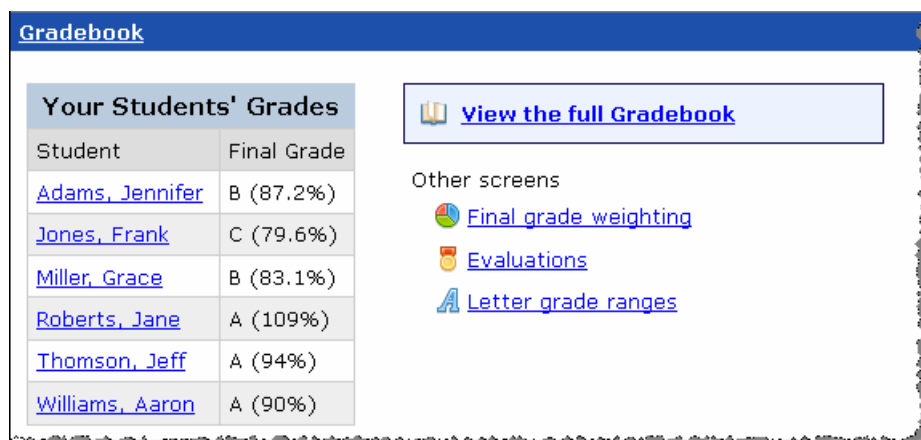
The Gradebook portlet offers several options for letting you see a snapshot of all student work in a course, as well as looking at a single student's work in detail.

Reviewing all students' progress

There are a few places where you can review all students' progress side by side.

Viewing a summary

The home screen of the Gradebook shows each student's grade so far.

To view the home-screen summary of your students' grades:

- Navigate to the appropriate Gradebook instance, as described on .

  The system displays the home screen, which includes each student's grade for the course so far.

Viewing a detailed list

If you want to see more details, the Full Gradebook also lists the same information, along with all the grades that students have received on assignments and evaluations.

To the left is each student's name and final grade so far.

To the right are the grades that each student received for individual assignments and evaluations, or for individual units or types. This display will vary depending on your weighting method — if your weighting method assigns a weight to either units or types, then grades will be shown for each unit or type.

You can expand or collapse all groups, or one group in particular, to see details about individual grades in that category.

Regardless of the exact items listed, you can use the blue arrows to scroll right and then back left, or the left/right arrows on your keyboard. You can also click **View everything at once on one page** to expand the width of the screen to include all items — if needed, your browser will add a horizontal scrollbar so you can move from left to right.

Note that assignments are ordered as follows:

*   Assignments with earlier due dates are shown before those with those later due dates.

*   Evaluations are shown after assignments.

To view a detailed summary:

*   Navigate to the Full Gradebook, as described on page 285.

    The system displays a screen that lists each student's overall grade so far.

Viewing one student's progress

For each student in the course section, the system creates a grade sheet that shows each student's progress in the course so far, including the student's grades on each assignment and evaluation.

To review an individual student's progress:

1 Navigate to the appropriate Gradebook portlet instance, as described on page 243.

2 Locate the name of the student whose work you want to review and click that student's name.

   The system displays the grade sheet for that student.

3 If you want to navigate away from this student's grade sheet to another student's, note that you can use the **Previous** and **Next** links at the top right of the screen to navigate through the whole list of students.

You can also click the down arrow next to **Other students** to display a menu of all students in the class and jump to any of them.
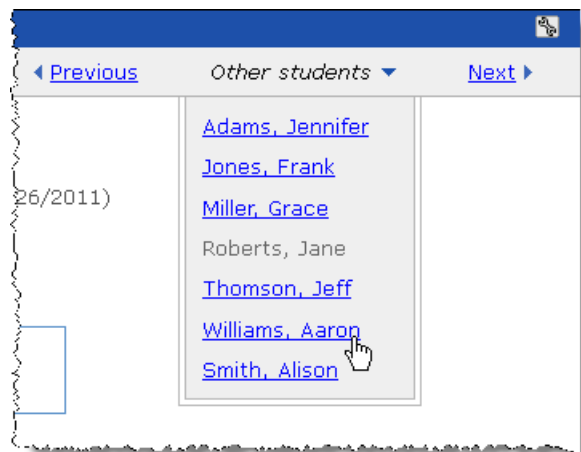
About the student view of the grade sheet

When the student navigates to the Gradebook, the view simply shows his or her grade sheet. This view is similar to your view, but it will not shows assignments that the student isn't yet allowed to see (whereas your view will show all assignments).

Why would the final grade be different in the student's view?

If a student has a score on an assignment that he or she isn't allowed to view, your view of the grade sheet will include this score, but the student's view will not. As part of this, your view of the student's overall grade for the course will reflect the inactive assignment score, but in the student view it will not.

Why would students have grades for assignments that they are not allowed to see? This can happen in certain unusual circumstances. For example, if you create a basic assignment and enter a score for a student but never activate the assignment, the student will not be allowed to see the score (or the assignment). This will lead to differences between your view and the student's view of the grade sheet and overall grade.

In this situation, at some point you may want to either drop the score, as described in "Dropping or reinstating a score for an assignment" on page 292, or activate the assignment so that the student can see the score, as described in "Open" on page 74.

Adjusting grades

There are two ways to adjust a student's overall grade:

- Manually adjust the student's overall points or percentage for the term.

- Drop one or more scores of the scores that contribute to the overall grade.

Manually adjusting the total points or percentage

You can add or remove points to the student's overall grade as appropriate.

To adjust a student's grade:

1 Display the grade sheet for the student, as described in "Viewing one student's progress" on page 289.

In the upper right portion of the screen, you will see one of the following links:
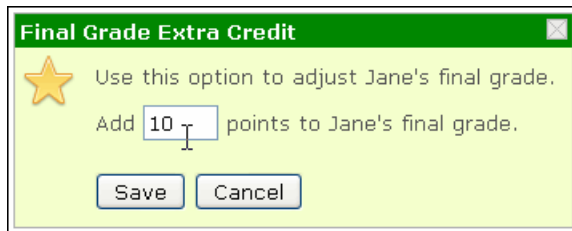
- **Give** *Student Name* **extra credit** — displays if you have never adjusted the grade
- **Adjust** *Student Name***'s extra credit** — displays if you previously adjusted the grade

2 Click whichever of these links is displayed.

The system displays a pop-up titled **Final Grade Extra Credit**. If you previously adjusted the student's grade, this pop-up shows the adjustment.

The pop-up may ask for a percentage, or it may ask for points — this varies depending on which weighting method you are using.

3 Do any of the following as appropriate —

- To increase the student's grade, enter the value you want to add.
- To reduce the students grade, enter a minus sign followed by the value you want to deduct.

4 Click **Save**.

The system saves your changes, and the screen updates to show that an adjustment has been made. The student will see this on his or her view of the grade sheet.
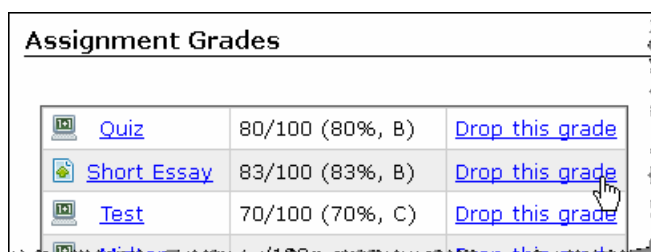
Dropping or reinstating a score for an assignment

If desired, you can drop a score for a particular assignment or evaluation. When you do this, the student's overall grade for the term will be automatically recalculated without that score.

After dropping a grade, you can always go back at any time and reinstate it. You can drop (an reinstate) as many scores as appropriate.
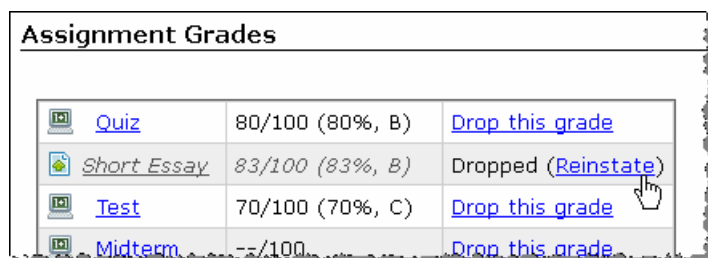
To drop or reinstate a score:

1 Display the grade sheet for the student, as described in .

2 In the list of assignments, locate the grade that you want to drop or reinstate. Click the corresponding **Drop this link** or **Reinstate** link.

Assignment Grades		
Quiz	80/100 (80%, B)	Drop this grade
Short Essay	83/100 (83%, B)	Drop this grade
Test	70/100 (70%, C)	Drop this grade

The system saves your change, and the student's grade is automatically recalculated. If you have dropped a grade, the assignment is now shown in gray, italic type, and there is a **Reinstate** link shown, so you can reverse the change later if desired.

Assignment Grades		
Quiz	80/100 (80%, B)	Drop this grade
Short Essay	*83/100 (83%, B)*	Dropped (Reinstate)
Test	70/100 (70%, C)	Drop this grade
Midterm	--/100	Drop this grade

Leaving feedback

If you want to leave a student feedback regarding his or her work for the term.

To leave feedback:

1 Display the grade sheet for the student, as described in "Viewing one student's progress" on page 289.

2 As appropriate, leave feeding using either the **Add a feedback comment** or **Add a feedback file** link. If you need help with this, see "Working with feedback" on page 631.

Exporting grades to Excel

If desired, you can create a Microsoft Excel spreadsheet that contains a summary of students' grades, including the following:

- Each student's overall grade so far.

- Each student's grade on each assignment and evaluation.

You can view all students' grades at once, or a single student's.

Exporting all student's grades

Use this procedure to create a spreadsheet that includes the grades for all students in the course.

To export a summary to Excel:

1   Navigate to the full gradebook, as described on .

2   Click the **Export to Excel** link.
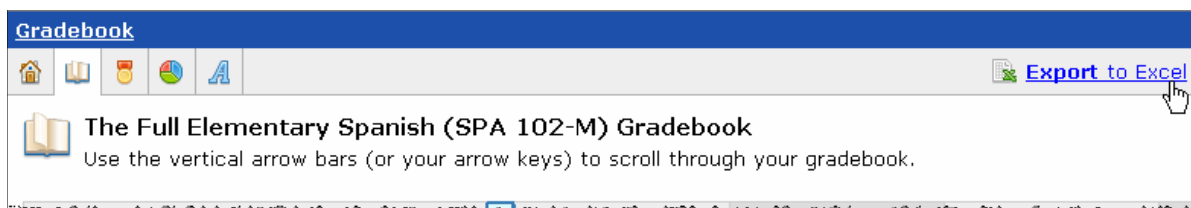
3   Following the links for opening or saving the spreadsheet.

Export a single student's grades

Use this procedure to create a spreadsheet that includes the grades for all students in the course.

To export a single student's grades to Excel:

1   Display the grade sheet for the appropriate student, as described on page 289.

2   Click the export link, which is displayed below the student's photo.
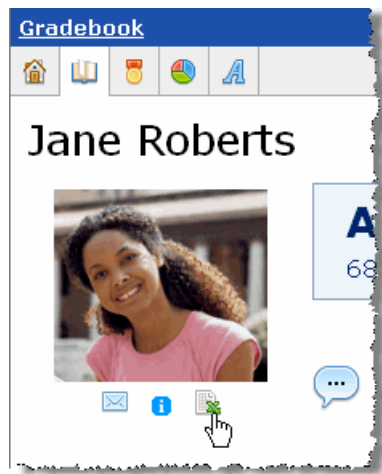
3   Follow the prompts to either open or save the file.

Next steps

Once your course section is complete and you are satisfied with all the final grades in the Gradebook, you probably will want to submit the grades to your school's ERP system. Depending on how your system is set up, you will probably use one of the following methods:

• The Gradebook Grade Entry feature. If your school uses this feature, you can submit the grades directly from the Gradebook. For details, see "Submitting grades to the ERP system" on page 297.

• The Grade Entry portlet, which is a feature available with CRM Faculty. For details on this portlet, see *Getting Started with CRM Faculty*, which is available from MyJenzabar.

11

Submitting grades to the ERP system

Gradebook Grade Entry is a feature in the Gradebook portlet that lets you submit grades and attendance records to your school's ERP system.

In this chapter:

- Key concepts
- Submitting grades and attendance records
- Re-submitting data

Key concepts

Gradebook Grade Entry is a feature that, when enabled by an administrator, lets you submit details generated within your course section to your school's ERP system. The primary purpose of this feature is to let you submit grades. Depending on how your school's site is configured, the feature may also let you submit attendance records.

These functions minimize the need for manual data entry. When this feature is enabled, you should not need to use the Grade Entry portlet (part of CRM Faculty).

Depending on your system's setup and your permissions, you can submit data about the following:

- A student's midterm or final grade.

- The total number of absences the student had.

- The student's last day of attendance.

Depending on the level of permission that you have within your ERP system, you may also be able to re-submit previously submitted data. This may be useful if you already submitted a grade, then decide to make an adjustment.

Note that even if you do not have permission to submit or re-submit data, you may still be able to use this feature to simply review data on students' grades and attendance.

Navigating to the Submit Grades screen

Before you can work with the Gradebook Grade Entry feature, you must display the **Submit Grades** screen.

To navigate to the Submit Grades screen:

1   Navigate to the appropriate Gradebook portlet instance, as described in .

2   Click **Submit your grades**.
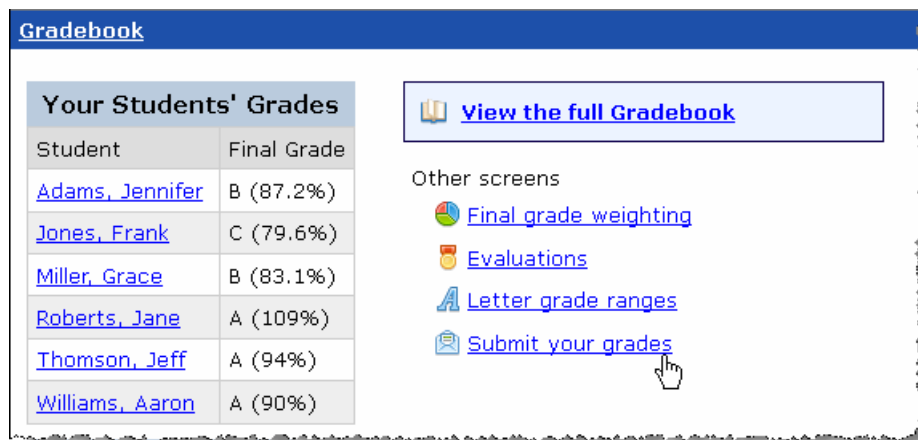
The system displays the Submit Grades screen.

If you do not see the Submit Your Grades link, there are a few possible reasons why, including:

- *The portal is not currently configured to allow faculty members to submit grades.*
- *You do not have permission to view, submit, or re-submit grades. This is set within your school's ERP system.*
- *This course is a portal-only course, which means that it does not exist in the ERP system, and there is no submit feature.*

If the link is not displayed, and you think that it should be, contact a system administrator.

At this point, you can submit or re-submit grades, as described in "Submitting grades and attendance records" and .

Or, if you need help understanding the information on this screen, see .

About the Submit Grades screen

Typically, when you display the Submit Grades screen, it includes only one tab — either **Midterm Grades** or **Final Grades** — depending on what point you are at in the term. In some cases, your school's ERP system might be set up to allow you to submit both midterm and final grades at the same time, but in most cases only one tab will be available.

The structure of both these tabs is the same. The tab lists all students in the course section, grouped according to whether their grades have been submitted or not submitted.

The two columns at the right — **Absences** and **Last Date of Attendance** — will show up only if your portal administrator has configured the system to include them. Note that the display of each of these columns is configured separately, so an administrator can choose to include one but not the other.

The following sections include more details about the **Not yet submitted** and **Submitted** categories.

Not yet submitted

Typically, each row of student data in the **Not yet submitted** area is populated with information from the Gradebook and Attendance portlets for the course context. The system uses the following icons:

A red icon indicates that the student's information is not ready for submission, either because the data could not be read from the Gradebook or Attendance portlet, or because there is a problem with the data. In this case, you should enter the information manually.

A green icon indicates that the student's information is ready for submission. Before submitting this data, can also overwrite any of the data in the row.

Submitted

Each row in the **Submitted** area shows the data that was previously submitted. In some cases, your system may be configured so you can re-submit information. Otherwise, the information in the **Submitted** area is read-only.

In this area, the system labels each row of student data with one of the following icons:

A green checkmark indicates that there are no problems with the data submitted.

A yellow icon indicates that, since the student's information was submitted, it changed in the Gradebook portlet or in the ERP system.

Submitting grades and attendance records

Use the procedure below to submit grades and attendance records.

Your ability to submit grades depends on settings in your school's ERP system. Specifically, your ERP system must be set up to give you permission to submit grades, and you must be at a point in the term during which the system accepts submission of this data.

If you have the ability to submit grades, then you also have permission to submit attendance records, if the portal is set up to allow this.

To submit or grades and attendance data:

1 Navigate to the **Submit Grades** screen, as described on .

2 Check the **Not yet submitted** area of the screen to review the details that are ready for submission. At the bottom of the list of students, you will see one of the following:

   • A **Submit Selected Grades** button — If this button is displayed, you have permission to submit grades.
   • A grayed-out button that says **You don't have permission to enter new grades** — If this message is displayed and you think you should have permission, contact an administrator.

3 Using the checkboxes at the left, select the student(s) whose data you want to submit. If appropriate, modify the grades or attendance data displayed for any of the students.

4 Click **Submit Selected Grades**.

   If you clicked **Submit Selected Grades** without having entered required information that was required, the system displays an error message. In this case, click **OK** and correct the omissions.

   Assuming you entered all required data, the system displays a **Please wait** dialog as it submits the selected data. Afterward, the system displays the **Submit Grades** screen, this time with the student(s) whose data you submitted listed in the **Submitted** area of the screen.

Re-submitting data

In some cases, you might have the ability to re-submit information that you have already sent. This permission is determined within your school's ERP system.

To re-submit grades or attendance records:

1   Navigate to the **Submit Grades** screen, as described on .

2   Check the **Submitted** area of the screen to review those students whose data has been submitted. At the bottom of the list, you will see one of the following buttons:

   • **Submit Selected Grades** — this means you have permission to re-submit grades.
   • **You don't have permission to update existing grades** (grayed out) — If this message is displayed and you think you should have permission, contact an administrator.

3   Using the checkboxes at the left, select those student(s) whose data you want to re-submit. Modify the data as appropriate.

4   Click **Submit Selected Grades**.

   If you clicked **Submit Selected Grades** without having entered required information — for example, if you deleted the student's attendance data and that data was required — the system displays an error message. In this case, click **OK** and correct the omissions.

   Assuming you entered all required data, the system displays a **Please wait** dialog as it updates the selected data. Afterward, the system displays the **Submit Grades** screen, this time updated to reflect the changes you made.

Part 4: Additional portlets

This section describes additional portlets that you can use in your course context — or anyplace where you manage pages.

In this section:

Additional portlets

12

All My Courses

e-Racer includes a portlet — called All My Courses — that you can use to easily navigate to any of your course contexts.

In this chapter:

- Key concepts
- Displaying details about your course sections
- Navigating to a context through All My Courses

Key concepts

The All My Courses portlet offers another avenue for letting you (and other users) quickly navigate to your (or their) course sections.

The portlet includes a record for every course section that you teach, with a drop-down list that lets you show past, current, or future sections. The portlet shows both a list of courses and a graphical display of them.

Default view versus maximized view

This section describes the default view versus the maximized view of the All My Courses portlet.

Default view

The default view of the All My Courses portlet shows details on your current course sections. Information on each section is broken into three columns:

- **Course code** — The code for the section.
- **Course** — The name of the course. The text in this column also serves as a link to the main page of the context for the course section.
- **Grade** — A link to the Gradebook page within the appropriate course context.
- **Schedule** — The course section's meeting time (the start times are shown).

Each term can be hidden or collapsed using the plus/minus sign at the upper right.

Note that if you set the **Show** drop-down list to **Past Courses** or **Future Courses**, the portlet is automatically maximized.

Maximized view

The maximized view of the portlet is identical to the default view except that it also includes a graphical view of the schedule(s).

About the student view

When a student maximizes the All My Courses portlet, the portlet is the same as the faculty view except that in the **Grade** column, instead of showing a dash, the system shows the student's current grade. Clicking the grade displays the student view of the Gradebook (the student's grade sheet).

No default locations

In the default layout of the portal, there are no instances of the All My Courses portlet — but you can add this portlet to your course section's pages. If desired, you may also be able to add the All My Courses portlet to a Campus Groups context, or to another context that you might manage.

If you need help with adding a portlet to a page, see .

When adding the All My Courses portlet to a page, you don't need to worry about permissions and privacy, because the portlet only reflects information about the person viewing it.

Displaying details about your course sections

If your portal includes an instance of the All My Courses portlet, use this procedure to display a list of your course sections.

To display a list of your course sections in the All My Courses portlet:

1   Navigate to the page that hosts the All My Courses portlet.

2   If appropriate, maximize the portlet instance by clicking its name.

3   Use the drop-down list to choose the type of course section you want to display — past, current, or future.

    The system displays a list of the appropriate course sections.

Navigating to a context through All My Courses

If your portal includes an instance of the All My Courses portlet, use this procedure to navigate to any of your course contexts.

To display a list of your course sections in the All My Courses portlet:

1   Navigate to the page that hosts the All My Courses portlet.

2   If appropriate, maximize the portlet instance by clicking its name.

3   Use the drop-down list to choose the type of course section to which you want to navigate — past, current, or future.

    The system displays a list of the appropriate course sections.

4   Do one of the following:

    •   To go to the main page of the course context, click the name of the course.
    •   To go to the course section's Gradebook page, click the dash in the **Grade** column.

13

Announcements

The Announcements portlet lets you post announcements for students and others.

In this chapter:

- Key concepts
- Setting up an instance of the portlet
- Working with announcements

Key concepts

The Announcements portlet is used to post and display announcements.

Portlet basics

All instances of this portlet are essentially a window into the same announcements, the only difference being that some instances might show announcements posted to base (global) roles, and some might show only those announcements posted to context-specific roles.

Default view versus maximized view

In the default view of the portlet, users see the titles of the announcements that they have permission to see, along with (typically) the authors' names.

In the maximized view, users see the title and details of the announcements.

If any announcements are new since the logged-in user last looked at the portlet, they are grouped under a **New** subheading, while announcements the user has already seen are listed under **Viewed**.
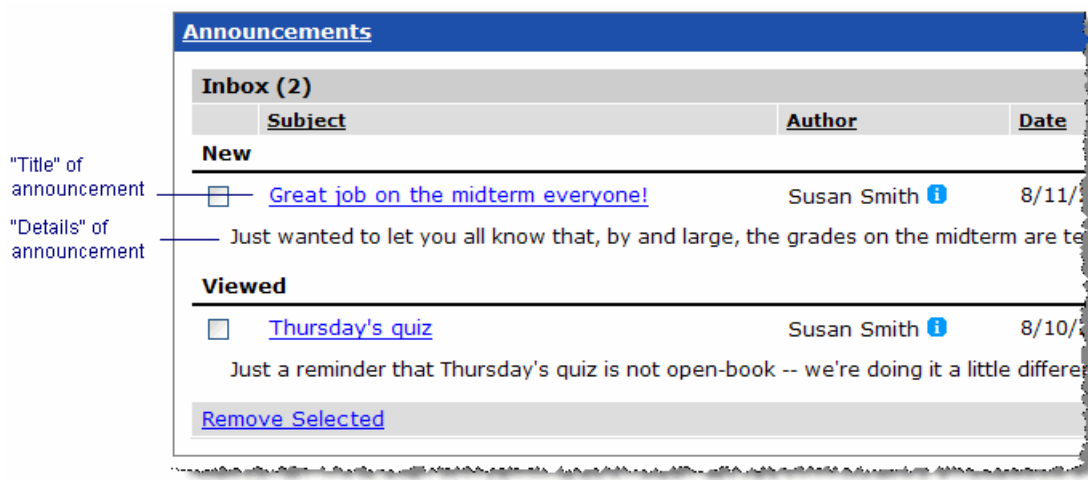
If the user has already seen all announcements, the system omits the **New** and **Viewed** subheadings (and all items are just listed under **Inbox**).

If the logged-in user has permission to create announcements, the maximized view includes a **Manage** menu. Additionally, any announcements that the user has already posted are displayed under an **Outbox** heading.

Default locations

By default, the portal includes several Announcement portlet instances. The following are a few that you may have permission to help manage:

* The default layout for course contexts includes an instance of the Announcements portlet on the Main page.

* If you manage a Campus Group, the context for your group is created with an Announcements portlet instance on its default page.

* The default layout for your My Pages context includes an instance of the Announcements portlet.

If desired, you may be able to create additional instances. If you need help with adding a portlet to a page, see "Creating a portlet instance" on page 571.

Setting up an instance of the portlet

When setting up an instance of the Announcements portlet, you may want to consider the following:

• Do you want the instance to show all announcements posted through portal, or do you want to show just those announcements posted to context-specific roles in the context that hosts the portlet instance? For details, see "Choosing the type of announcements the portlet instance will show."

• Should the portlet instance allow for anonymous posting? For details, see "Allowing or disallowing anonymous announcements."

• In any given instance of the portlet, should any additional roles be allowed to post announcements? For details, see "Managing permissions."

Choosing the type of announcements the portlet instance will show

For each instance of the Announcements portlet, you can choose one of the following two options:

• **Context-Based** — With this setup, the portlet instance displays only those announcements sent to context-specific roles the user belongs to within the host context. Announcements sent to the user by name are not shown, and announcements sent to base roles are not shown.

• **General** — With this setup, the portlet instance displays *all* announcements the user has permission to see, regardless of where in the portal the announcements were created, and regardless of what type of role they were posted to. So this includes announcements sent to:

    • The user by name.
    • Base roles that the user belongs to.
    • All context-specific roles that the user belongs to.

With either of these two setups, the information contained in the portlet instance is not specific to that instance. The Announcements portlet always simply offers a window into a single set of announcements. However, with the "General" window, the scope of the window is larger.

For help understanding the difference between context-specific and base (global) roles, see Chapter 35, "Creating and maintaining roles."

If the Announcements portlet instance is located in a context that has no context-specific roles, it will function as a General portlet instance, regardless of which configuration option you choose.

To choose the type of announcements the portlet instance will show:

1 Navigate to the appropriate portlet instance and click the wrench icon.

   The system displays the **Customize Portlet** *Announcements* screen, with the **Preferences** tab selected.

2 Click the **Settings** tab.

The system displays the **Settings** screen.

3   In the area labeled **Portlet Type**, choose either **General** or **Context-Based**, as appropriate.

4   Click **Save**.

Allowing or disallowing anonymous announcements

For each instance of the Announcements portlet, you must decide whether people creating announcements will be allowed to do so anonymously. By default, this is not allowed.

Note that you cannot prohibit a portlet instance from displaying anonymous announcements that were created elsewhere. However, if the portlet instance is set up to be **Context-based** (as described in "Choosing the type of announcements the portlet instance will show" on page 312), and if you have administrative privileges in the context (such as in your course context), you can prohibit anonymous posting in all portlet instances, which would eliminate the issue.

To allow or disallow anonymous announcements:

1   Navigate to the appropriate portlet instance and click the wrench icon.

The system displays the **Customize Portlet *Announcements*** screen, with the **Preferences** tab selected.

2   Click the **Settings** tab.

The system displays the **Settings** screen.

3   In the area of the screen labeled **Allow Anonymous Posting**, select or de-select the checkbox as appropriate.

4   Click **Save**.

Managing permissions

For each instance of the portlet, you can allow other roles to post announcements. You do this by giving them the **Can Post Announcements** permission.

With this permission alone, users can post announcements to the various context-specific roles only. If you want the role to also have permission to post to base roles, which could be desirable if you set up the portlet using the **General** option, check with an administrator to make sure that the role has the **Can Post to Base Roles** global portlet operation.

Note that when users post announcements, they have the ability to publish the announcement immediately, without review. Their announcement will be displayed not only in this portlet instance, but in all portlet instances configured to display this type of announcement. Because of this, you may want to be somewhat cautious about giving roles permission to post announcements.

To allow roles to post announcements:

1   Navigate to the appropriate portlet instance and click the wrench icon.

The system displays the **Customize Portlet** *Announcements* screen, with the **Preferences** tab selected.

2   Click the **Permissions** tab.

The system displays the **Define Permissions** screen, which lists all the roles defined for this context as well as all the base (global) roles.

3   Locate the role that should be able to post announcements. Select the corresponding checkbox in the **Can Post Announcements** column.

4   Click **Save**.

Working with announcements

This section describes how to create, edit, archive, and delete announcements.

Deactivated announcements

By default, announcements will be displayed immediately and indefinitely. However, the author of the item, or someone with permission to modify it, can choose to do either of the following:

- Have the announcement display in the future.

- Make the announcement end at a specific time.

In most cases, this is done using the **Start** and **End on** fields on the form where a user creates or edits the announcement.

During those times when the announcement is not actively being displayed, it is considered deactivated (either **unsent** or **archived**). At these times, most users cannot see it — though the author can at any time edit the announcement and display it.

Note that while someone other than the author can deactivate an announcement (for example, an administrator), once it is deactivated, only the author can see it.

Unsent announcements

If desired, you (or an administrator) can specify that an item will launch at a specific time in the future, or that it will be launched later manually. Prior to its launch, the item is saved in your

outbox, under an **Unsent** subheading. At this point, only you can see and work with the announcement.

Archived announcements

If desired, you (or an administrator) can specify that an announcement will end at a certain time, after which it is deleted or becomes archived.

If you do this and choose to archive the announcement (instead of deleting it), it is stored in your outbox under an **Archived** subheading. At this point, only you can see the announcement.

Posting an announcement

Regardless of who the intended recipients are, the process of publishing an announcement is more or less the same. However, because of potentially conflicting setup and permissions options, we suggest that you use one of the following procedures. If desired, you can mix and match these procedures as long as you understand the general requirements of each.

Note that whenever you post an announcement, unless you select an option to post the item anonymously, your name will be listed as the author. If you do not see the anonymous option on the form, then anonymous posting is not an option (and your name will be listed).

Posting to a context-specific role

Use this procedure to post an announcement to a context-specific role, such as the Students role within a particular course context (which includes only the students enrolled in the course section).

To complete these steps, you must have the **Can Post Announcements** permission for the appropriate portlet instance.

To post to a context-specific role:

1   Navigate to the appropriate portlet instance. The instance must be located in the context that hosts the role you want to post to.

2   Maximize the portlet and select **Manage** > **New Announcement**.

The system displays a form. The exact details on the form may vary slightly depending on your permissions. The illustration below shows a typical view for a user who does not have the **Can Post to Base Roles** global permission.

3   In the **Title** field, enter a label or heading for the announcement.

4   In the **Send to** area, use the available checkboxes to select the context-specific role(s) that the announcement is targeted to.

5   In the **Details** field, enter the main text of the announcement (assuming the **Title** text does not cover everything you want to say).

6   By default, your announcement will be displayed immediately and indefinitely. But if you want to change this, choose dates and times for the **Start** or **End on** fields.

7   If you want to post anonymously, and if the portlet instance is set up to allow for this, select the checkbox labeled **Post Announcement Anonymously**.

8   Click **Save**.

Posting to a base (global) role

Use this procedure to post an announcement to a base (or global) role, such as the global Students role, which includes every student in the institution. Before doing this, you may want to make sure that the roles you are posting to have access to an Announcements portlet instance that was set up using the **General** option. This is the only type of portlet instance that will actually show an announcement posted to a base role.

By default, users have a **General**-type Announcements portlet instance in their My Pages contexts, but if you plan to regularly communicate with base-role members this way, you may want to confirm that they actively refer to this portlet instance or to a similar one.

To complete this procedure, you must have the following permissions:

• The **Can Post Announcements** permission for an instance of the Announcements portlet, preferably one set up using the **General** option.

• The **Can Post to Base Roles** global portlet operation.

To post an announcement to a base (global) role:

1   Navigate to the appropriate portlet instance. We suggest that you use a portlet instance that has been set up using the **General** setup option. (Assuming that you are posting the announcement for immediate display, this type of portlet will let you review the announcement as soon as you post it and see it as other users will.)

2   Maximize the portlet instance and select **Manage** > **New Announcement**.
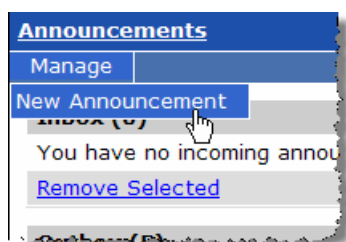
The system displays a form. The exact details on the form may vary slightly depending on your permissions. The illustration below shows a typical view for a user who has permission to post to base roles.

3   In the **Title** field, enter a label or heading for the announcement.

4   In the **Send to** area, use the available checkboxes to select the base role(s) that you should see the announcement. The base roles are displayed beneath the context-specific roles.

5   In the **Details** field, enter the main text of the announcement (assuming the **Title** text does not cover everything you want to say).

6   By default, your announcement will be displayed immediately and indefinitely. But if you want to change this, choose dates and times for the **Start** or **End on** fields.

7   If you want to post anonymously, and if the portlet instance is set up to allow for this, select the checkbox labeled **Post Announcement Anonymously**.

8   Click **Save**.

Posting to an individual

Use this procedure to post an announcement to one or more individuals. Before posting an announcement this way, you may want to verify that the recipient(s) are people who have access to

an Announcements portlet instance that is configured using the **General** option. This is the only type of portlet instance that will actually show an announcement posted to an individual.

By default, users have a **General**-type Announcements portlet instance in their My Pages contexts, but if you plan to regularly communicate with individuals this way, you may want to confirm that they actively refer to this portlet instance or to a similar one.

To complete these steps, you must have the **Can Post Announcements** permission for any instance of the Announcements portlet. To post the announcement to an individual who is *not* a member of the context that hosts the Announcements portlet instance that is being used, the user must have the **Can Post to Base Roles** global portlet operation.

To post an announcement to an individual:

1   Navigate to any instance of the Announcements portlet.

2   Maximize the portlet instance and select **Manage** > **New Announcement**.

    The system displays a form.

3   In the **Title** field, enter a label or heading for the announcement.

4   Click **Add Individual Users**.

    The system displays a pop-up screen labeled **Select Users**.

5   Select the individual(s) who should see the announcement, and click **OK** on the **Select Users** dialog box.

6   In the **Details** field, enter the main text of the announcement (assuming the **Title** text does not cover everything you want to say).

7   By default, your announcement will be displayed immediately and indefinitely. But if you want to change this, choose dates and times for the **Start** or **End on** fields.

8   If you want to post anonymously, and if the portlet instance is set up to allow for this, select the checkbox labeled **Post Announcement Anonymously**.

9   Click **Save**.

Editing an announcement

Use this procedure to edit your own announcement or someone else's. You can use the procedure to change the text of an announcement, to archive it, or, if it is currently inactive, to display it.

Note that in order to edit an announcement other than your own, you must have a global portlet operation called **Show Admin Section**. To check to see if you have this permission, maximize the portlet instance and check to see whether it contains an area labeled **All Announcements**. If you see this area, then you have the permission. If you don't have this permission and feel you need it, speak with an administrator for your portal.

To edit an announcement:

1   Navigate to the appropriate portlet instance and maximize it.

2   Locate the announcement that you want to edit and click the corresponding pencil icon.

If you are the author of the announcement, it is located under the **Outbox** heading.

If you are not the author, look for it under the area labeled **All Announcements**. (If you are the author and you have the **Show Admin Section** global permission, you will see the item in both places — it doesn't matter which one you select.)

The system displays a form.

3   Make the necessary changes, including any of the following:

  •   Changes to the announcement's text — its **Title** and **Details**.

  •   The people that are allowed to see the announcement — you can do this using the **Send to** area of the form.

  •   The **Start** and **End** times of the announcement — for example, if the announcement is not currently active, you can make it display, and vice versa.

4   Click **Save**.

Deleting an announcement

Use this procedure to delete your own announcement or someone else's.

Note that in order to delete an announcement other than your own, you must have a global portlet operation called **Show Admin Section**. To check to see if you have this permission, maximize the portlet instance and check to see whether it contains an area labeled **All Announcements**. If you see this area, then you have the permission. If you don't have this permission and feel you need it, speak with an administrator for your portal.

To delete an announcement:

1   Navigate to the appropriate portlet instance and maximize it.

2   Locate the announcement that you want to delete. If you are the author of the announcement, it is located under the label **Outbox**. If you are not the author, look for it under the area labeled **All Announcements**. (If you are the author and you have the **Show Admin Section** global permission, you will see the item in both places — it doesn't matter which one you select.)

3   Click the corresponding trash-barrel icon.

The system generates a dialog asking if you are sure you want to delete the item.

4   Click **OK**.

Archiving several announcements at once

If there are several announcements that should be archived, you may want to archive them all at once. Note that after you do this, only the author will have the ability to re-launch the announcement(s) later. If you don't want the announcements to ever be re-launched, you might want to delete them instead, as described in

Note that in order for a user to delete an announcement other than his or her own, the user must be a member of the Administrators role or have a global portlet operation called **Show Admin Section**.

To archive several announcements at once:

1   Navigate to the appropriate portlet instance and maximize it.

2   Scroll down to the area labeled **All Announcements**.

3   Using the checkboxes at the left, select the announcements in this area that you want to archive.

4   Click **Deactivate Selected**.

For all users except the author(s), the announcement(s) are removed from view. For the authors, the items will be displayed under an **Archived** subheading under the **Outbox** label.

Announcements

14

Blog

The Blog portlet allows authorized users to post text and images for the rest of the portal community to review.

For help posting a blog item, see the Blog portlet's online help (click the question mark icon in the corner). This section offers a brief overview of the portlet and focuses on how to administer and manage it.

In this chapter:

- Key concepts
- Enabling or disabling RSS feeds
- Changing the default settings for authors
- Modifying the layout of the portlet instance
- Specifying the maximum posts to display
- Managing permissions

Key concepts

The Blog portlet lets you and other authorized users post blog items. As shown below, the typical blog post might include a headline, body text, and optionally one or more images.

By default, the portlet instance displays the headline and the opening text of each post, and users must click through to read the entire item. The system uses a vertical bar at the left to denote whether the item is being displayed for the first time. If the item is marked "important," the bar at the left is red; otherwise it is blue. The next time the same logged-in user displays the portlet instance, the bar for the item will be omitted.

In general, the information contained in each portlet instance is specific to that instance — in the default and minimized views of the portlet — though this portlet also includes a "My

Subscriptions" view. With this feature, individuals can use any Blog portlet instance to subscribe to posts from other portlet instances, and they can read all relevant posts from within a single portlet instance.

Choices for authors

When adding a post to an instance of the Blog portlet, the author of the post has several options.

- The person posting the item can include (or exclude) his or her name under the item's headline.
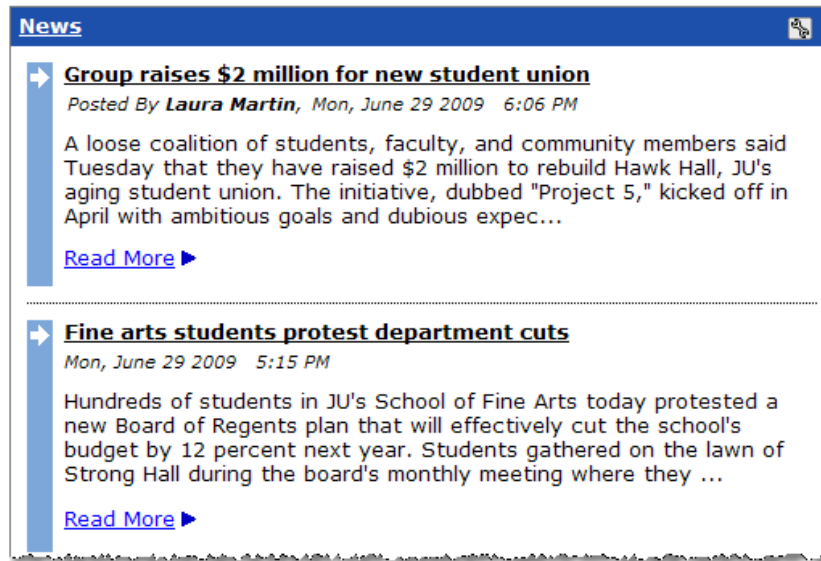
- The author can mark a post as being of high importance, which makes the item's headline red. When such posts are new to the currently logged-in user, they are also denoted by a red bar at the left. (The next time the same logged-in user displays the portlet instance, the bar for the item will be omitted.)
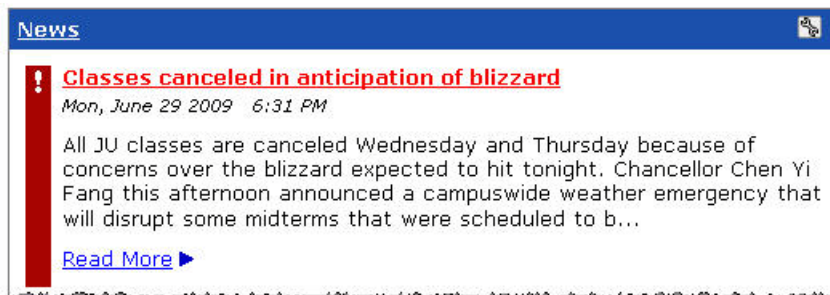
- Depending on the configuration of the portlet instance, the author can select the roles that are allowed to display the post.
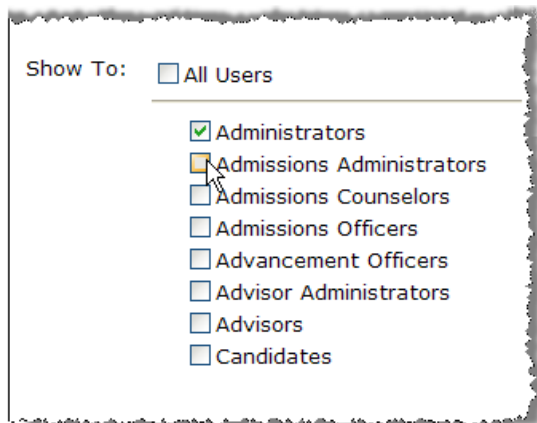
- Depending on the configuration of the portlet instance, the person posting the item can enable commenting for the post. When commenting is enabled, a **Discuss** link is added to the item. Users can click this link to leave a comment and review other people's comments. Note, however, that the usability of this feature varies depending on whether an administrator has configured the portlet instance to allow any roles to add comments.
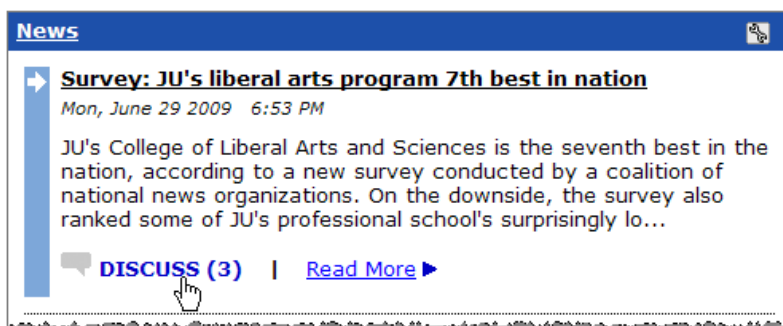
Choices for the faculty member managing the portlet

When configuring the Blog portlet, you as the faculty member have several options:

- You can enable a Blog portlet instance to generate RSS feeds, as described in "Enabling or disabling RSS feeds" on page 329.

- In any given portlet instance, you can set default values for options available to authors when they post blog items, as described in "Changing the default settings for authors" on page 330.

- You can specify the layout of the portlet instance, as described in "Modifying the layout of the portlet instance" on page 331.

- You can specify the maximum number of items to display on the opening screen of the Blog portlet instance.

- As described in "Managing permissions," for each instance of the portlet, you can allow roles to do any of the following:

  - Post blog items.
  - Administer the portlet instance.
  - Comment on posts.

No default locations

In the default layout of the portal, there are no instances of the Blog portlet, but you may be able this portlet to your course section's pages. If desired, you may also be able to add the Blog portlet to a Campus Groups context, or to another context that you might manage.

If you need help with adding a portlet to a page, see "Creating a portlet instance" on page 571.

Enabling or disabling RSS feeds

For any instance of the Blog portlet, you can enable an RSS feed. With this functionality, people can use an RSS reader to view items posted in the portlet instance. The RSS reader will display the 20 most recent items from the portlet instance.

Note that when you enable RSS feeds, the options available to authors change slightly. That is, normally an author could specify which roles can display his or her post. However, when RSS feeds are enabled, authors cannot restrict the availability of the items they post — all users with the ability to display the portlet instance, including guests, can also display all posted items.

To enable or disable RSS feeds:

1   Navigate to the appropriate portlet instance and maximize it.

2   Click the **Setup** link.

    The system displays the **Setup** screen.

3   As appropriate, select or de-select the **Enable RSS** checkbox.

The University Observer

Main Screen > Setup

Setup

RSS Subscription

This portlet is able to create an RSS feed of the items you post, to which users can sul preference. However, enabling this feature means all your posts must be public, so you on a post-by-post basis.

RSS: ☑ Enable RSS (also disabling post-level security)
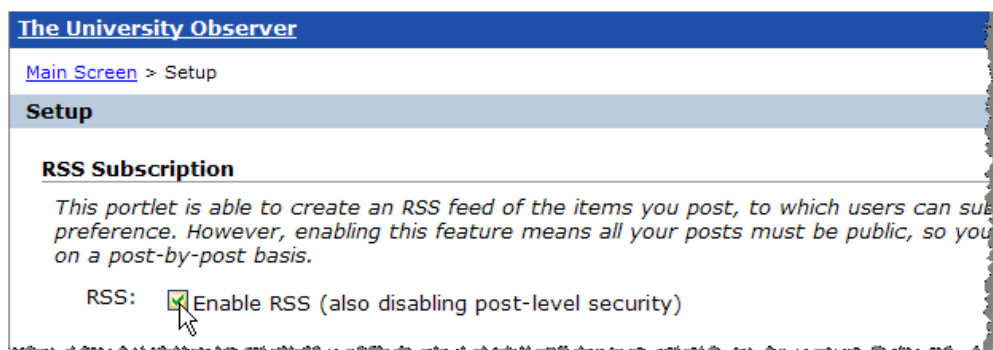
4   Scroll to the bottom of the screen and click **Save**.

If you choose to enable RSS functionality, the system adds a subscription URL to the **Subscribe** area of the portlet instance (which users can access by clicking the **Subscribe** link at the bottom of the portlet instance). If you disable RSS functionality, the system removes this link.

Changing the default settings for authors

When a user posts a Blog item, that user has several choices. The author can specify:

- Whether to enable commenting on the item (though the usefulness of this choice might be limited depending on whether an administrator has allowed any roles permission to post comments — for details see).

- Whether to include his or her name under the item's headline.

- Which roles can view the post (but note that if RSS is enabled, this choice is not available).

When authors post items in the portlet, certain defaults are set up for each of these choices. You as an administrator can dictate what these defaults are. Note that people posting Blog items can change any of these choices for their posts.

To change the default settings for authors:

1 Navigate to the appropriate portlet instance and maximize it.

2 Click the **Setup** link.

The system displays the **Setup** screen.

3 In the area of the screen labeled **Default Values**, make any of the following changes as appropriate:

- To control whether commenting is enabled by default, select or de-select the **Enable commenting** checkbox.
- To control whether the author's byline is displayed by default, select or de-select the **Include your name as the author checkbox**.
- In the **Show to:** area, select any roles that should, by default, be allowed to display Blog posts.

4 Scroll to the bottom of the screen and click **Save**.

Modifying the layout of the portlet instance

By default, the Blog portlet displays the headline for each post and the first part of the body text. However, this is configurable. You can choose from three layout options:

- The default, called the **Summary** option, displays each item's headline and the first 250 characters of the text. With this option, a maximum of five items are displayed on the initial view of the portlet instance (before it is maximized). You can also specify that fewer posts will be shown, as described in "Specifying the maximum posts to display" on page 333.
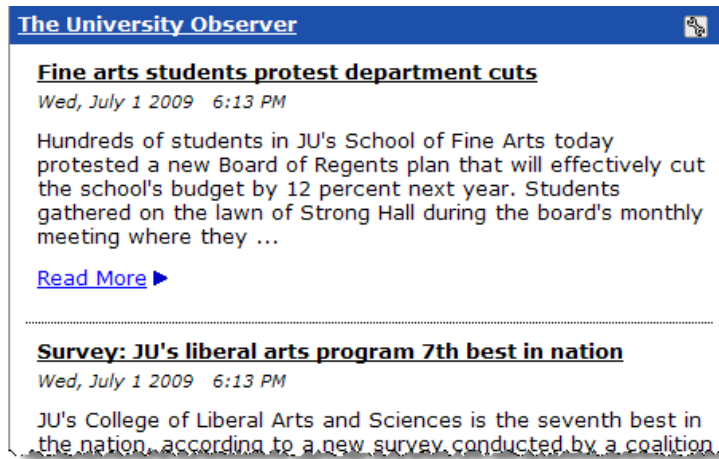
- With the **Headline Only** view, the portlet instance list headlines but no body text. With this option, a maximum of 10 items are displayed on the initial view of the portlet instance (before it is maximized). You can also specify that fewer posts will be shown, as described in "Specifying the maximum posts to display" on page 333.

- The **Full Item** view displays the heading and full text of the newest posts in the instance. With this option, a maximum of two items are listed on the main page of the instance (before it is

maximized). You can also specify that fewer posts will be shown, as described in "Specifying the maximum posts to display" on page 333.
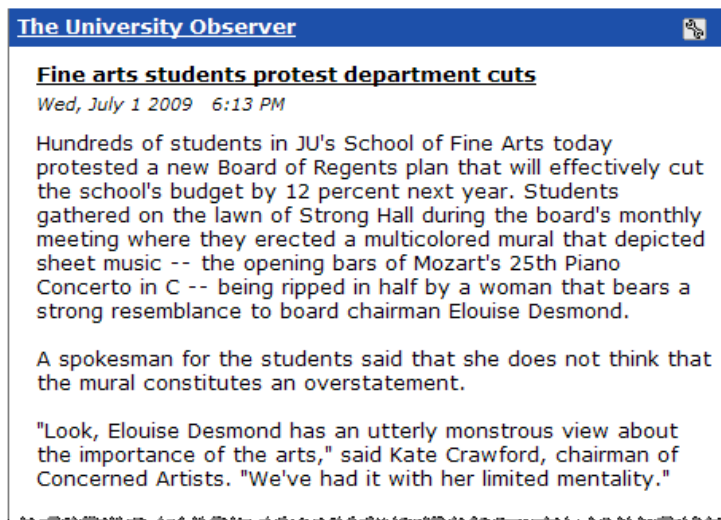
To specify the layout of the portlet instance:

1   Navigate to the appropriate portlet instance and maximize it.

2   Click the **Setup** link.

    The system displays the **Setup** screen.

3   In the area of the screen labeled **Main Screen**, select the layout style you want to use.
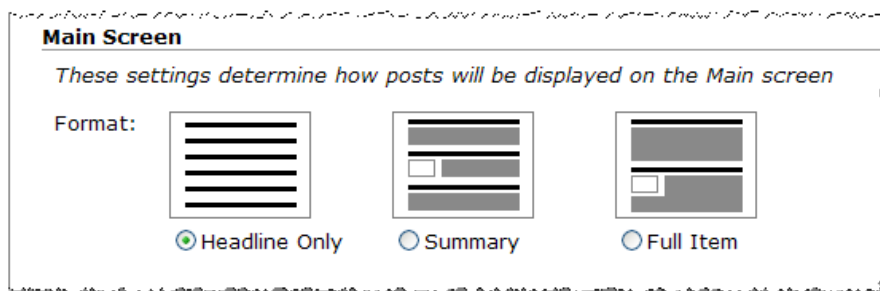
4   Scroll to the bottom of the screen and click **Save**.

Specifying the maximum posts to display

In the first views of the Blog portlet instance that a user sees, the instance probably will not display every post that has been launched. It shows a limited number of posts.

For example, the portlet instance below is actually host to more than 100 items, but in this view, where the portlet is not yet maximized, the portlet displays only two items. This is the default view of the portlet instance.
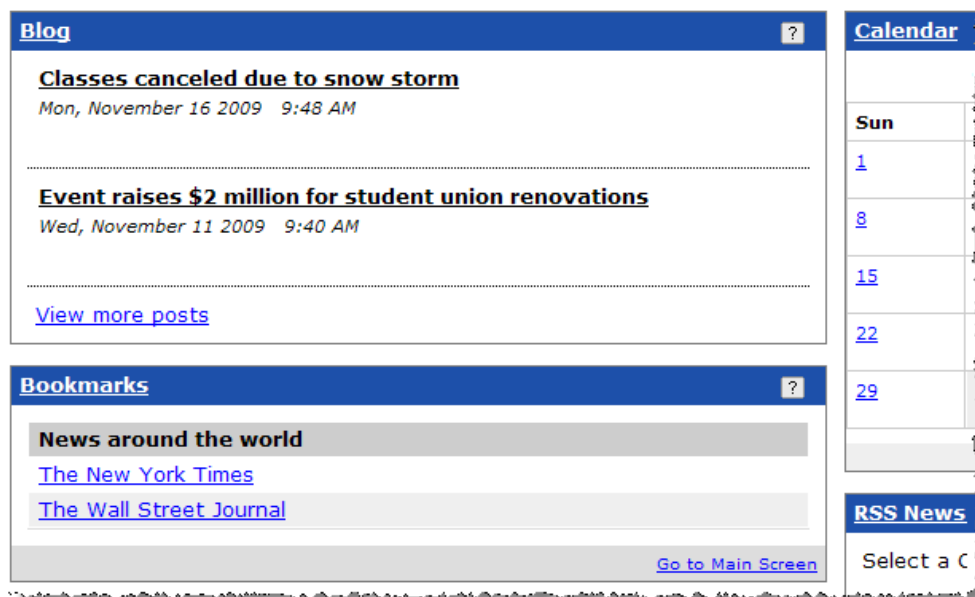
When the user maximizes the portlet instance, the instance might show a greater number of posts than it did in the initial non-maximized view, but it still will probably not show all of them

(depending on how many exist). Users can click the **Older Items** link (shown below) to display more posts.

Using the Blog portlet instance's **Setup** screen, you can specify the exact number of posts that you want to display in the maximized view. This number can be between one and 100.

The number of posts displayed in the default view of the portlet will always be one of the following, whichever is smaller:

- The default number determined by the layout style of the portlet instance (described in "Modifying the layout of the portlet instance" on page 331).

- The number that you specify, using the Setup screen, for the maximized view.

So, for example, suppose you have chosen to display a maximum of four posts on the maximized view of the portlet instance. If you are using the headline-only layout style for the portlet instance (which dictates a maximum of 10 items for the initial view), the instance will bypass the default maximum and use your choice of four, because it is smaller. If you are using the full-item layout style, which dictates a maximum of two posts, the system will go with the default for that style.
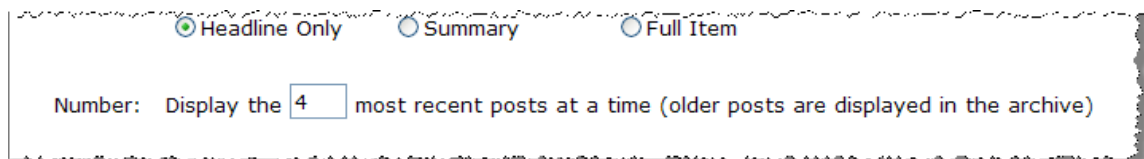
To specify the maximum posts to display:

1   Navigate to the appropriate portlet instance and maximize it.

2   Click the **Setup** link.

The system displays the **Setup** screen.

3   In the area of the screen labeled **Main Screen**, locate the field labeled **Number**.

4   Enter the number of posts that you want to display on the maximized view of the portlet. Bear in mind that the number you enter here can also limit the number of posts displayed in the initial view of the portlet.

Headline Only   Summary   Full Item

Number: Display the 4   most recent posts at a time (older posts are displayed in the archive)

5   Scroll to the bottom of the screen and click **Save**.

Managing permissions

When configuring this portlet, you can specify which roles can do each of the following:

- Post blog items

- Administer the portlet instance

- Comment on Blog items

You can grant the first two permissions using the wrench icon, as described in "Allowing roles to post blog items, access the Setup menu" on page 336. You control commenting permissions using the **Setup** menu, as described in "Allowing roles to comment" on page 338

Note that there are no global portlet operations for the Blog portlet. What this means is that any user with permission to display a page hosting the portlet instance can display the instance and any Blog posts that have not been restricted by authors.

Allowing roles to post blog items, access the Setup menu

For each portlet instance, you can specify who is allowed to do post blog items and use the Setup menu, as described below.

Post blog items

This permission also lets a user modify and delete his or her own posts. The exact name of this permission is **Can Add, Edit, and Delete Own Posts**.

Access the Setup menu of the portlet instance

This permission lets the user control many aspects of the portlet instance — that is, the role will have permission to complete any of the following tasks:

- "Enabling or disabling RSS feeds" on page 329.

- "Changing the default settings for authors" on page 330.

- "Modifying the layout of the portlet instance" on page 331.

The exact name of this permission is **Can Administer Portlet**. Note, however, that if you want to give a role permission to display the wrench-icon menu, this can only be done by giving the role the **Can Admin** privilege for the context, which is a much bigger privilege overall (as described in "Letting a role administer a context" on page 603).

To allow roles to post blog items or access the Setup menu:
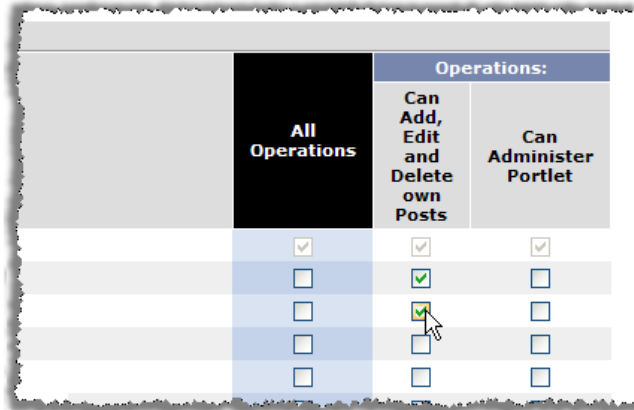
1 Navigate to the appropriate portlet instance and click the wrench icon.

2 Click the wrench icon.

 The system displays the **Customize portlet *Blog*** screen, with the **Preferences** tab selected.

3 Click the **Permissions** tab.

The system displays the **Permissions** screen.

4   Locate any roles that should be allowed to post items or administer the portlet instance. Select the corresponding checkboxes.

5   Scroll to the bottom of the screen and click **Save**.

Allowing roles to comment

By default, no roles are allowed to comment on blog posts. What this means is that if the author of a post enables commenting, the **Discuss** link will be active on the post, but users who click through will not be able to add comments.

To resolve this, you can configure the portlet instance to specify that some or all roles have the ability to comment.

To allow roles to comment:

1 Navigate to the appropriate portlet instance and maximize it.

2 Click the **Setup** link.

   The system displays the **Setup** screen.

3 On the section of the screen labeled **Contents Permissions**, select the roles that should be allowed to comment.

4 Click **Save**.

15

Bookmarks

This chapter explains how to set up the Bookmarks portlet and add links to it.

In this chapter:

- Key concepts
- Working with sets
- Working with bookmarks
- Other administrative tasks
- Managing permissions

Key concepts

The Bookmarks portlet lets you or other users post links — or **bookmarks** — that students and others may find useful.

Portlet basics

Within each instance of the Bookmarks portlet, you create **sets**, which are essentially groups of bookmarks. Individual bookmarks are placed within sets.

All users are allowed to view instances of the Bookmarks portlet — so if you want to restrict access to it, you must place it on a page that is restricted.

By default, most roles are not allowed to post bookmarks and sets. If you want to give a role this privilege for an instance of the portlet that you manage, see "Managing permissions" on page 349.

Default locations

By default, the portal includes several Bookmarks portlet instances. The following are a few that you may have permission to help manage:

- The default layout of course contexts includes an instance of the Bookmarks portlet on the Main page.

- The default layout of your My Pages context includes a Bookmarks instance called "My Bookmarks."

- If you manage a Campus Group, the main page of the group is created with an instance of the Bookmarks portlet.

If desired, you may be able to create additional instances. If you need help with adding a portlet to a page, see "Creating a portlet instance" on page 571.

Working with sets

When you add an instance of the Bookmarks portlet to a page, by default it contains a set called **Ungrouped**. You can use this set to host all your bookmarks, or you can create different sets.

Note that sets are displayed only if they contain bookmarks. So if you create a set but do not place any bookmarks inside it, the set will not show up, except in certain administrative screens.

Attributes of a set

In the Bookmarks portlet, a category has the several attributes, which you can configure:

- **Name** — Each set has a name that serves a heading within the portlet instance.

- **Description** — Optionally, you can include a description which will be displayed below the portlet name.

- **Position** — The position determines where the set is placed relative to other sets.
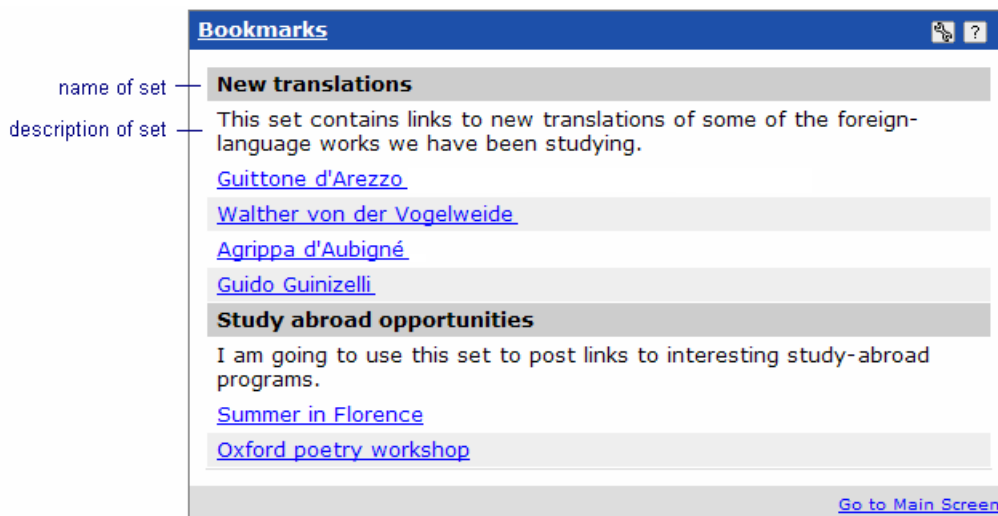
Creating a set

This procedure describes how to create a set.

To create a set:

1   Log in to the portal and navigate to the appropriate portlet instance.

2   Maximize the portlet instance.

3   Choose **Manage** > **Add a Set**.

   The system displays a form.

4 Fill out the fields as appropriate. For help understanding a specific field, see "Attributes of a set" on page 341.

5 Click **Save**, or **Save and Add Another**.

Modifying a set

Use this procedure to do any of the following:

- Change the name or description of a set.

- Change the position of a set relative to the other sets.

- Reorder the bookmarks within a set.

To edit a set:

1 Log in to the portal and navigate to the appropriate portlet instance.

2 Maximize the portlet instance.

Choose **Manage** > **Edit Set** > *name of set*.
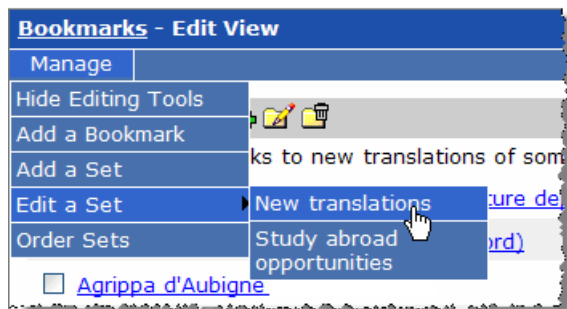
The system displays a form.

3 Make any necessary changes. For help understanding a specific field, see "Attributes of a set" on page 341.

4 Click **Save**.

Reordering sets

You can change the position of one set when you edit it, as described above, in "Modifying a set." However, if you want to rearrange all of the sets, you may want to use the steps described below.

To reorder categories:

1 Log in to the portal and navigate to the appropriate portlet instance.

2 Maximize the portlet instance.

3   Choose **Manage** > **Order Sets**.
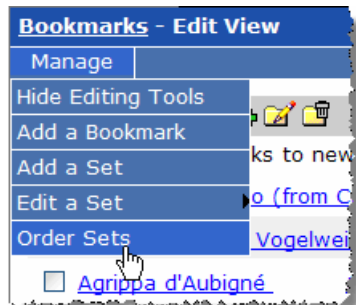
The system displays a list of the existing sets.

4   Use the boxes at the left to change the order of the sets.
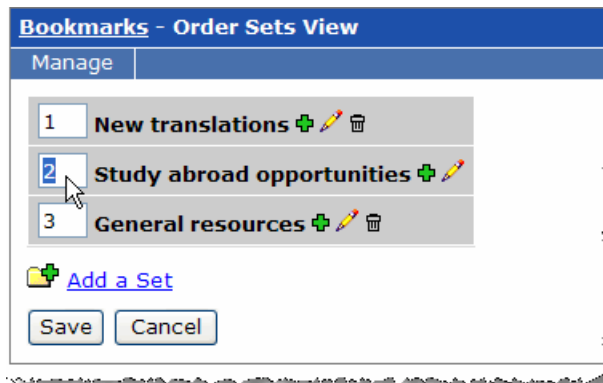
5   Click **Save**.

Deleting a set

Use this procedure to delete a set. Note that when you delete a set, you delete all the bookmarks that the set contains.

To delete a set:

1   Log in to the portal and navigate to the appropriate portlet instance.

2   Maximize the portlet instance.

3   Choose **Manage** > **Order Sets**.

The system displays a list of the existing sets.

4   Locate the set you want to delete and click the corresponding trash-barrel icon.

The system displays a dialog asking if you're sure you want to delete the set.

5   Click **OK**.

Working with bookmarks

This section describes the process of adding and modifying bookmarks, among related tasks.

Attributes of a bookmark

In the Bulletin Boards portlet, a bookmark — or link — has the following characteristics.

Name

The name is label that is used to identify the link in the portlet. If you don't enter a name, the system will use the URL.

URL

You use the **URL** field to enter the link you want to post.

Set

For each bookmark your create, you must choose a set that will host the bookmark.

Description

The **Description** field lets you enter additional details about the bookmark. The description is displayed below the name.
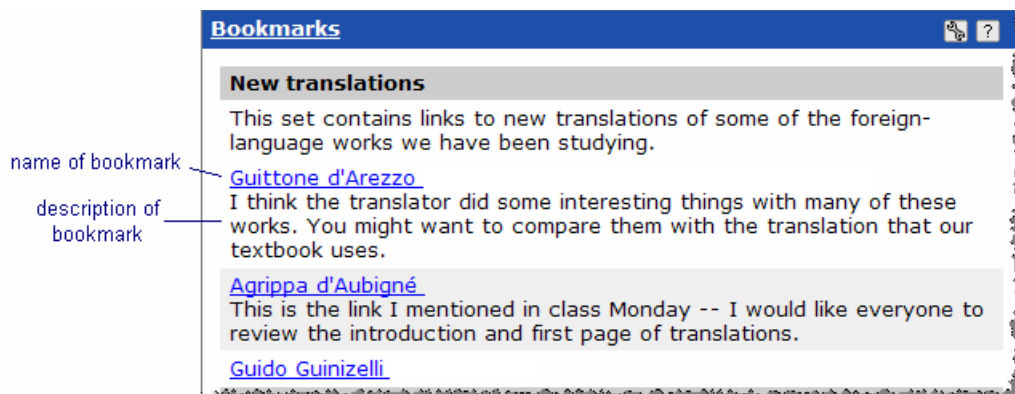
Start and End

The **Start** and **End** fields determine when the topic will be displayed. These fields are displayed only if the portlet instance is set up to use the display indicator (this is described in "Configuring whether bookmarks will be displayed indefinitely" on page 348). The default setup is that these fields are available.

If you are using the **Start** and **End** fields, note that you can choose to have a bookmark end at a specific point. With this option, you have the additional choice of having the bookmark be

automatically deleted it when the date is reached, or making it become inactive. (For details, see).

After End

If you have specified an end date for the bookmark, you use the **After End** setting to specify what happens to the bookmark at that point. You can choose either of the following options:

- **Delete** - Have the system delete the bookmark.

- **Inactive** - Have the system hide the bookmark from all users except you and others with administrative privileges. This might be a good option if you want to make the bookmark active again at some point in the future. If you do this, the system adds an **Inactive** heading within the appropriate set (in the administrative view), which you can use to manage these inactive links.
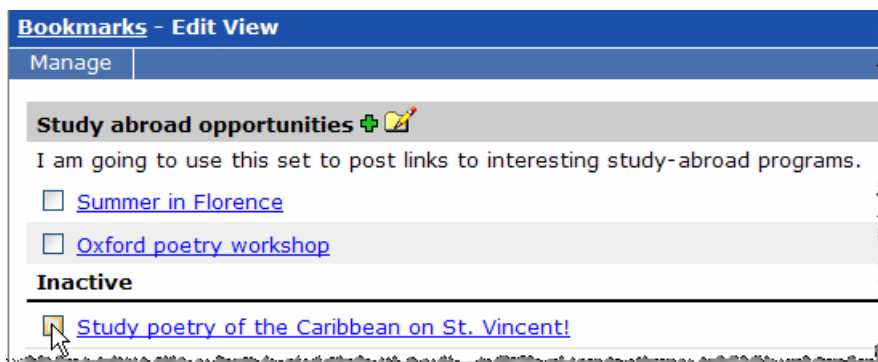
Creating a bookmark

This procedure describes how to create a bookmark.

To create a bookmark:

1. Navigate to the appropriate portlet instance.

2. Maximize the portlet instance.

3. Choose **Manage** > **Add a Bookmark**.

   The system displays a form.

4. Enter a link in the **URL** field, and fill out any other fields as appropriate. For help understanding a specific field, see "Attributes of a bookmark" on page 344.

5. Click **Save**.

Importing a bookmark from the File Cabinet

This procedure describes how to import a bookmark from the File Cabinet.

To create a bookmark:

1   Navigate to the appropriate portlet instance.

2   Maximize the portlet instance.

3   Click the link labeled **Import Bookmarks from File Cabinet**.

The system displays the **Edit** > **Import Bookmarks from File Cabinet** screen.

4   Locate the bookmarks you want to import and click the corresponding checkboxes.

5   Click **Import Selected**.

Saving a bookmark to the File Cabinet

Use this procedure to save a bookmark to the File Cabinet.

To save a bookmark to the File Cabinet:

1   Navigate to the appropriate portlet instance.

2   Maximize the portlet instance.

3   Locate the bookmark you want to save and select the corresponding checkbox.

4   At the bottom of the portlet, set the drop-down list to **Save to the File Cabinet**.

The system updates the screen to include a **Submit** button.

5   Click **Submit**.

Editing a bookmark

Use this procedure to edit a bookmark. You might use these steps if you want to do any of the following:

- Change the label or URL of a bookmark.

- Change its description.

- Change its start or end date, delete it, or make it inactive (if the portlet instance uses the display indicator, which is described in "Configuring whether bookmarks will be displayed indefinitely" on page 348).

To edit a bookmark:

1   Navigate to the appropriate portlet instance.

2   Maximize the portlet instance.

3   Locate the bookmark that you want to edit and click the corresponding pencil icon.
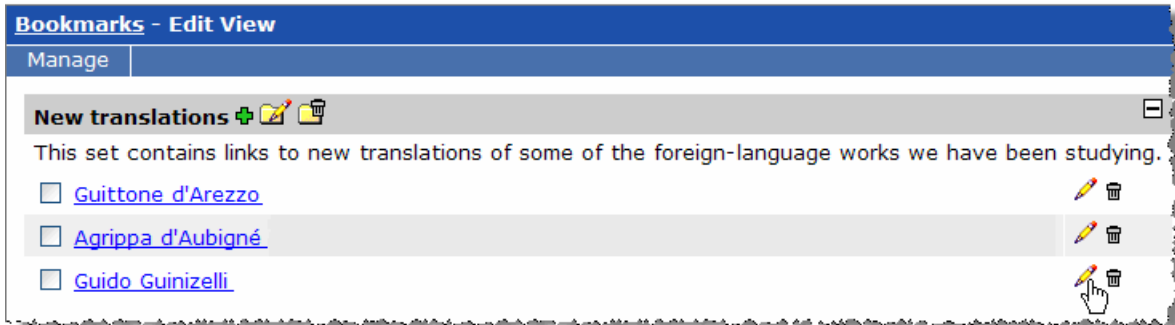
The system displays a form.

4   Make any necessary changes. For help understanding a specific field, see "Attributes of a set" on page 341.

5   Click **Save**.

Deleting a bookmark

Use this procedure to delete a topic.

As an alternative to this procedure, you can also choose to make the bookmark inactive, which might be useful if you want to hide the bookmark from students but have the option of making it active again later. For details, see "Editing a bookmark" on page 346.

To delete a bookmark:

1   Navigate to the appropriate portlet instance.

2   Maximize the portlet instance.

3   Locate the bookmark that you want to edit and click the corresponding trash-barrel icon.

The system displays a dialog asking whether you are sure you want to delete the bookmark.

4   Click **OK**.

Other administrative tasks

This section describes other administrative tasks you might want to complete.

Configuring whether bookmarks will be displayed indefinitely

You can set up an instance of the Bookmarks portlet so that one of the following is true:

- All bookmarks are displayed indefinitely (that is, until someone manually deletes them).

- Bookmarks are displayed for a duration chosen by the person posting the bookmark, or by someone else who modifies the bookmark later. With this option, the system adds **Start** and **End** fields to the screen where you create and modify bookmarks.

To configure whether bookmarks will be displayed indefinitely:

1 Navigate to the Bookmarks portlet instance that you want to configure.

2 Click the wrench icon.

   The system displays the **Customize Portlet** *Bookmarks* screen, with the **Preferences** tab selected.

3 Click the **Settings** tab.

4 Do one of the following:

   - To make all bookmarks display indefinitely, de-select the **Use Display Indicator** checkbox.
   - To give users the option of giving their bookmarks a duration, select the **Use Display Indicator** checkbox.

5 Click **Save**.

Allowing for logging

For each instance of the portlet, you can configure whether the system will log users' activity.

To configure logging:

1 Navigate to the Bookmarks portlet instance that you want to configure.

2 Click the wrench icon.

   The system displays the **Customize Portlet** *Bookmarks* screen, with the **Preferences** tab selected.

3 Click the **Settings** tab.

4 Do one of the following:

   - To allow for logging, select the **Log Bookmarks** checkbox.
   - To stop logging, de-select the **Log Bookmarks** checkbox.

5 Click **Save**.

Managing permissions

Once you have decided the purpose of the portlet instance, you may want to designate another role as being allowed to manage bookmarks and sets. This section explains how to grant these privileges.

Note that anyone with permission to display the Bookmarks portlet instance can see the links that are posted.

Available permissions

There are two instance-level permissions available for the Bookmarks portlet.

Can Manage Bookmarks

By default, only the Administrators role is allow to post bookmarks. However, in any instance of the Bookmarks portlet, you can give any role the ability to manage bookmarks. When you do this, members of the role can:

- Post bookmarks in that instance.
- Modify bookmarks that they and any other user have posted by:
  - Changing the name of the bookmarks.
  - Changing a bookmark's description.
  - Changing the URL.
  - Moving the bookmark to a different set.
  - Changing the duration of time that the bookmark will be displayed (if the portlet instance is configured to allow this; for details, see "Configuring whether bookmarks will be displayed indefinitely" on page 348).
- Import bookmarks from the File Cabinet
- Delete any bookmark in the instance.

Can Manage Sets

By default, only the Administrators role is allow to manage sets. However, in any instance of the Bookmarks portlet, you can give other roles this ability. When you do this, members of the role can:

- Post sets in that instance.
- Modify sets that they and any other user have posted by:
  - Changing a set's name
  - Changing a set's description
  - Modifying the default order of sets
- Delete any set in the instance.

Granting a role a permission

Use this procedure to grant a role privileges in an instance of the Bookmarks portlet.

To grant a role a permission:

1   Navigate to the Bookmarks portlet instance that you want to configure.

2   Click the wrench icon.

The system displays the **Customize Portlet *Bookmarks*** screen, with the **Preferences** tab selected.

3   Click the **Permissions** tab.

The system displays the **Permissions** screen.

4   Locate the role(s) that should have permissions. Select the corresponding checkbox(es) in the **Operations** column.

5   Click **Save**.

16

Bulletin Boards

The Bulletin Boards portlet lets people post messages for the rest of the community. Other users can respond to the original posters' messages via e-mail using links in the portal.

In this chapter:

Key concepts

When setting up an instance of the Bulletin Boards portlet, you create **categories**, and sub-categories, which are called **topics**. Messages are then posted within topics.

Portlet organization

For example, an Athletics tab might have a category called "Stuff for sale," and within that category, topics such as "Football equipment" and "Hockey equipment." Users with equipment to sell would then post their messages within one of those topics.

Bulletin Boards		
Search		
Transportation		
Name	**Messages**	**Last Message**
Car-pooling to the Maize game	1	11/20/2008 1:07:38 PM
Stuff for sale		
Name	**Messages**	**Last Message**
Hockey equipment	1	11/20/2008 1:08:24 PM
Baseball equipment	1	11/20/2008 1:09:07 PM
Football equipment	2	11/20/2008 1:10:03 PM
General		
Name	**Messages**	**Last Message**
Open Discussion	0	11/20/2008 12:29:02 PM

No default locations

In the default layout of the portal, there are no instances of the Bulletin Boards portlet — but you can add this portlet to your course section's pages. If desired, you may also be able to add the Bulletin Boards portlet to a Campus Groups context, or to another context that you might manage.

If you need help with adding a portlet to a page, see .

Working with categories

When you add an instance of the Bulletin Boards portlet to a page, by default it contains a category called General. However, you may want to rename this category and/or add and edit additional categories. Note that the portlet instance must have at least one category in order for users to be able to post items.

Attributes of a category

In the Bulletin Boards portlet, a category has the several attributes, which you can configure:

- A **Label** field — A word or phrase that describes the category and is displayed to any user with permission to display the category.

- A **Description** field — Additional description of the category, displayed to any user with permission to display the portlet instance.

- **Position** — The placement of the category relative to other categories.

- **Delete Topics After** — A setting that determines whether topics will ever be deleted. By default, this is set to Never.

- **Permitted Users** — A setting that determines which roles and users are allowed to display the category.

Creating a category

This procedure describes how to create a category.

To create a category:

1   Navigate to the appropriate portlet instance and maximize it.

2   Choose **Manage** > **Add Category**.

The system displays a form.

3 Fill out the fields as appropriate. For help understanding a specific field, see "Attributes of a category" on page 353.

4 Click **Save**.

Editing a category

Use this procedure to edit a category.

To edit a category:

1 Navigate to the appropriate portlet instance and maximize it.

2 Choose **Manage** > **Edit Category** > *name of category*.

The system displays a form.

3 Make any necessary changes. For help understanding a specific field, see "Attributes of a category" on page 353.

4 Click **Save**.

Reordering categories

Use this procedure to rearrange categories within the portlet instance.

To reorder categories:

1 Navigate to the appropriate portlet instance and maximize it.

2 Choose **Manage** > **Order Categories**.

The system displays a list of the available categories.

3 Use the boxes at the left to change the order of the categories.

4 Click **Save**.

Deleting a category

Use this procedure to delete a category. Note that when you delete a category, you also delete all of the topics and posts within the category.

To delete a category:

1 Navigate to the appropriate portlet instance and maximize it.

2 Choose **Manage** > **Order Categories**.
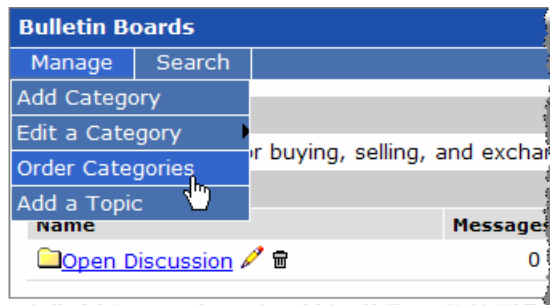
The system displays a list of the available categories.

3 Locate the category you want to delete and click the corresponding trash-barrel icon.
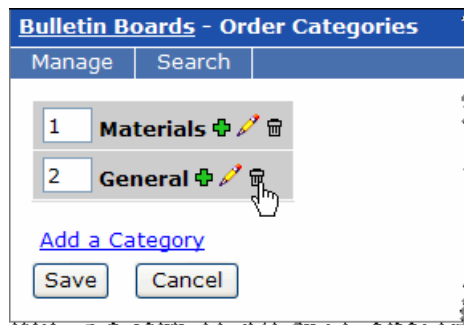
The system generates a dialog asking if you are sure that you want to delete the category.

4 Click **OK**.

Working with topics

When you add an instance of the Bulletin Boards portlet to a page, by default it contains a topic called Open Discussion (within the General topic). However, you may want to rename this topic and/or add and edit additional topic. Note that the portlet instance must have at least one topic (and one category) in order for users to be able to post items.

Attributes of a topic

In the Bulletin Boards portlet, a category has the several attributes, which you can configure:

- **Name** — A word or phrase that describes the category and is displayed to any user with permission to display the category.

- **Description** — Additional description of the category, displayed to any user with permission to display the portlet instance.

- **Category** — You must pick a category that will host the topic.

- **List This Topic After** — You use this setting to specify where this topic will be placed relative to other topics.

- **Start** and **End** — You use these settings to specify when the topic will be displayed. The default settings are that they will be displayed immediately. If you choose to have a topic end at a specific point, you can choose to delete it or have it become read only after the specified endpoint.

- **Remove Posts After** — You use this setting to specify when posts will be deleted, if ever.

- **Permitted Users** — A setting that determines which roles and users are allowed to display the category.

Creating a topic

This procedure describes how to create a topic.

To create a topic:

1 Navigate to the appropriate portlet instance and maximize it.

2 Choose **Manage** > **Add a Topic**.

The system displays a form.

3 Fill out the fields as appropriate. For help understanding a specific field, see "Attributes of a topic" on page 356.

4 Click **Save**.

Editing a topic

Use this procedure to edit a topic.

To edit a topic:

1   Log in to the portal and navigate to the appropriate portlet instance.

2   Maximize the portlet instance.

3   Locate the topic that you want to edit and click the corresponding pencil icon.

   The system displays a form.

4   Make any necessary changes. For help understanding a specific field, see "Attributes of a category" on page 353.

5   Click **Save**.

Deleting a topic

Use this procedure to delete a topic. Note that when you delete a topic, you also delete all of the posts within the topic.

To delete a topic:

1   Navigate to the appropriate portlet instance and maximize it.

2   Locate the topic that you want to edit and click the corresponding trash-barrel icon.

   The system displays a dialog asking whether you are sure you want to delete the topic.

3   Click **OK**.

Setting the 'Maximum Days Active' limit

By default, a message posted in the Bulletin Boards portlet will be left active until a user deletes it. However, you can configure any instance of the portlet to automatically delete messages after a certain period of time.

This section explains how to work with this setting, which affects all categories of the portlet instance, unless the category has its own setting.

Note that users who have permission to manage categories can also further limit the lifespan of messages in any particular category, as described in "Managing permissions" on page 358.

To set the 'Maximum Days Active' limit for messages:

1   Navigate to the appropriate portlet instance and click the wrench icon.

   The system displays the **Customize Portlet** *Bulletin Boards* screen, with the **Preferences** tab selected.

2   Click the **Settings** tab.

   The system displays the **Settings** screen.

3   In the **Maximum Days Active** area of the screen, choose the appropriate value from the drop-down list. (Choices are **3**, **7**, **15**, **30**, **60**, **120**, and **No Limit**.)

4   Click **Save**.

Managing permissions

This section explains how to grant these privileges to other roles that need to use the portlet instance.

Available permissions

The available permissions include the following:

Can Add Posts

The **Can Add Posts** permission lets the user post items and reply to other people's posts.

Can Edit and Delete Own Posts

The **Can Edit and Delete Own Posts** permission allows the user to edit and delete their own posts. Note that this permission is not meaningful unless you also give the user the ability to add their own posts and reply to other people's posts.

Can Manage Messages

The **Can Manage Messages** permission allows the user to edit and delete other people's posts.

Can Manage Categories

The **Can Manage Messages a**llows the user to create, edit and delete categories and topics. Note that "modifying" categories and topics means being able to:

- Change their names and descriptions.

- Reordering categories.

- Hiding them (and all their child messages) or otherwise modifying the time span that they are displayed.

- Specifying whether messages will be deleted or marked read-only after a topic is no longer active.

- Selecting a maximum lifespan for messages in the category, after which messages will be deleted. Note that if the instance is already set up to have the shortest possible lifespan for all messages, then this will not be an option.

- Selecting roles that can be allowed to view messages. By default, all users can view messages.

Users with this permission are also allowed to search for messages.

Giving a role a permission

Use this procedure to grant a role a permission.

To grant a role a permission within the Bulletin Boards portlet:

1   Navigate to the appropriate portlet instance and click the wrench icon.

The system displays the **Customize Portlet** *Bulletin Boards* screen, with the **Preferences** tab selected.

2   Click the **Permissions** tab.

The system displays the **Permissions** screen.

3   Locate the role(s) that should have privileges and select the appropriate checkboxes.

4   Click **Save**.

17

Calendar

This chapter offers an overview of the Calendar portlet.

In this chapter:

- Key concepts
- Specifying month view or list view
- Working with course calendars
- Managing permissions

Key concepts

The Calendar portlet lets users display and post information about events. Your portal probably includes multiple instances of the Calendar portlet.

About calendars

Within each instance of the portlet, an authorized user can create multiple **calendars**, which are essentially collections of events.

For example, a football coach might be in charge of a Calendar portlet instance called Football. Within that portlet instance, the coach might create two calendars —one called Varsity and one called Junior Varsity. They can be displayed simultaneously within the portlet instance, by anyone with permission to display the instance.

Further, people viewing a Calendar portlet instance can display as many (or as few) of the available calendars as they want. For example, a user looking at the view above might want to display the Varsity calendar only. The user can easily do this by de-selecting "Junior Varsity" in a panel at the left side of the Calendar instance.
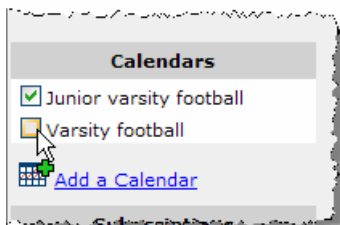
The result is a simplified view, as shown below.

Monday, 17 November	Tuesday, 18 November
3:00PM - 5:00PM Varsity practice	3:00PM - 5:00PM Varsity practice

Wednesday, 19 November	Thursday, 20 November
3:00PM - 5:00PM Varsity practice	3:00PM - 5:00PM Varsity practice

Friday, 21 November	Saturday, 22 November
8:00PM - 11:00PM Varsity Homecoming Game	

About the two types of subscriptions

In the Calendar portlet, there are two types of subscriptions, as detailed below.

Portlet-instance-level subscriptions

A user charged with maintaining an instance of the Calendar portlet might want the portlet instance to reference calendars created in *other* instances of the portlet.

For example, suppose there is a Calendar portlet instance called Athletics that includes a calendar titled Fundraising. The owner of the Football portlet instance might want his instance to display the upcoming fundraising events. He can make this happen by **subscribing** to the Fundraising calendar. Subsequently, people with access to the Football instance can display the Fundraising events.

Monday, 17 November	Tuesday, 18 November
3:00PM - 5:00PM Varsity practice 5:00PM - 6:30PM JV Practice	3:00PM - 5:00PM Varsity practice 5:00PM - 6:30PM JV Practice

Wednesday, 19 November	Thursday, 20 November
3:00PM - 5:00PM Varsity practice 5:00PM - 6:30PM JV Practice 6:00PM - 10:00PM Athletics Dept Alumni Dinner	3:00PM - 5:00PM Varsity practice 5:00PM - 6:30PM JV Practice

item from newly added calendar

Note, however, that not all calendars will be available for you to subscribe to. If a user maintaining an instance of the Calendar portlet wants to make one or more of his or her calendars available for subscription, he can **share** the calendar(s). Related to this, note that not every user has permission to share calendars. This is controlled by a global portlet operation called **Can Share Calendars**.

Similarly, not all people have the permission to subscribe the portlet instance to calendars (though you as a faculty member do in your course context). This is controlled by a portlet-level permission called Can Subscribe Calendars, which is described in "Available permissions" on page 369.

Personal subscriptions

Any user with permission to a display a Calendar portlet instance can add any of the displayed calendars to his or her My Calendars portlet instance, which is in the My Pages context.

About your course calendar

When your course context was created, the system automatically created a calendar for the course section. This calendar includes the meeting time(s) of your course section. The calendar is hosted by the Calendar portlet instance on the default page of your course context.

Further, all users associated with the course section — for example, all enrolled students and all assigned faculty members — are automatically subscribed to this calendar, which means that they can display it when they use the Calendar portlet instance in their My Pages contexts.

What this means is that, if you teach many course sections, when you navigate to the My Calendar portlet, you will see, under the **Subscriptions** heading, a calendar for each section you teach.
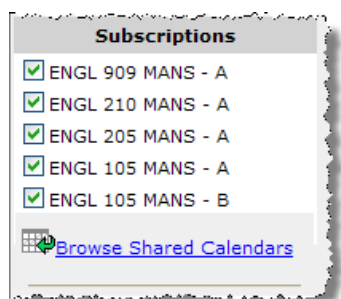
By default, each course calendar shows only the schedule for that course section. However, you can also:

- Manually add events to a section's calendar. (For details, see "Adding an event" on page 367.")

- Include the due dates for any of your assignments. That is, for every assignment you create or modify, you have the option of including the due date in the calendar, using the **New Assignment** or **Edit an Assignment** screen. (For details, see "Displaying or hiding a due date" on page 367.)

In most aspects, a course calendar is similar to any other calendar in the portal. Note, however, that it is not possible to delete a course calendar.

Default locations

By default, the portal includes several Calendar portlet instances. The following are a few that you may have permission to help manage:

- If your school uses the default template for course contexts, the Main page of each context will include an instance of the Calendar portlet. Each instance will be automatically subscribed to the calendar for that course section. (For help navigating to a course context, see "Navigating to a course context" on page 24.)

- If you manage a Campus Group, the context for your group is created with an Calendar portlet instance on its default page.

- The default layout for your My Pages context includes an instance of the Calendar portlet labeled "My Calendar." This instance will be automatically subscribed to the calendars for all the course sections that you teach.

If desired, you may be able to create additional instances. If you need help with adding a portlet to a page, see "Creating a portlet instance" on page 571.

Specifying month view or list view

For the Calendar portlet instance in your course context (or for any other that you are in charge of), you can choose whether the instance, in its default view, will display events in a monthly calendar style, or in a list display.

With the monthly calendar option, the system adds a pale yellow highlights to each day that has an item assigned to it, but users have to maximize the portlet instance to see the actual events.

The list form shows a few items that have been created, but users have to maximize the portlet instance to see all items.

To specify month view or list view:

1   Navigate to the appropriate portlet instance and click the wrench icon.

   The system displays the **Customize Portlet** *Calendar* screen, with the **Preferences** tab selected.

2   Click the **Settings** tab.

   The system displays the **Settings** screen.

3   Choose either **Month Calendar** or **Event List** as appropriate.

4   Click **Save**.

Working with course calendars

This section explains how to work with your course calendars.

Adding an event

To add an event to the calendar for one of your course sections, you must first navigate to the context for the course section. That is, while you can display the section from your My Calendar, the My Calendar view is essentially a "subscription" view and therefore not modifiable.

Note that when you add an event directly to the course calendar, you cannot track students' attendance for it. If you want to track attendance, you should navigate to the Attendance portlet and create a session on the desired day. Sessions created in the Attendance automatically show up in the course calendar (and you can also take attendance for them). For details, see "Adding a session" on page 231.

To add an event to a course calendar:

1 Display the Coursework portlet instance for the appropriate course section, as described in "Navigating to the Coursework portlet" on page 43.

2 Navigate to the calendar instance for the course section. By default, this instance is on the main page, though in your context, it could be in another location.

3 Use this instance of the course calendar to create your event.

The system adds the event to the appropriate course calendar and updates the view within students' My Calendar portlets.
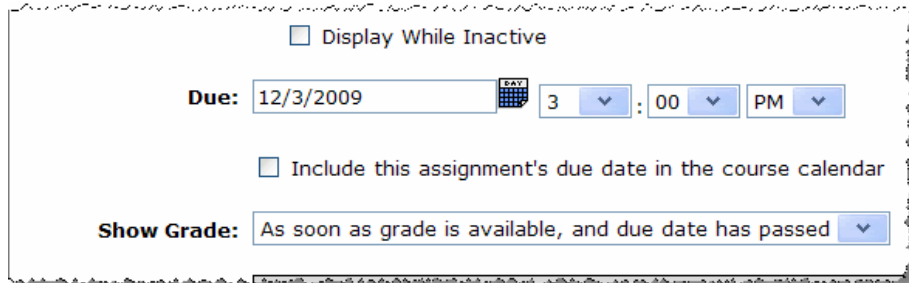
Displaying or hiding a due date

Use this procedure to add an assignment's due date to the course calendar. Note that the due date will show up on the calendar only after the assignment is made visible to students. (To make an assignment visible to students, you either activate it or use the **Display While Inactive** checkbox, which is described in "Open" on page 74.)

To display or hide a due date on the course calendar:

1 Display the Coursework portlet instance for the appropriate course section, as described in "Navigating to the Coursework portlet" on page 43.

2 Do one of the following:

- If you are creating an assignment, click **Add An Assignment** to display the **New Assignment** screen.
- If you want to create a password for an existing assignment, locate the assignment you want to modify. Click the corresponding pencil icon to display the **Edit Assignment** screen.

3 Scroll down a bit until you see the area of the screen that details when the assignment is due. Notice the checkbox labeled **Include this assignment's due date in the course calendar**.

4 Select or de-select the checkbox as appropriate.

5 Click **Save**.

If the assignment is active or inactive-but-visible, the system adds the event to the course calendar. If the assignment is not yet visible, the system stores your preference and will add the due date to the calendar once the assignment becomes visible to students.

Managing permissions

For each portlet instance, you can allow specific roles to help manage the portlet instance. This section explains how to grant these privileges.

Available permissions

This section lists the available portlet-level permissions.

Can Subscribe Calendars

The **Can Subscribe Calendars** permission allows the user to subscribe the portlet instance to a particular calendar that was created elsewhere. Note that when a user does this, every user with permission to display the portlet instance will see the calendar that has been subscribed to.

When a role has the **Can Subscribe Calendars** permission, the system displays the **Browse Shared Calendars** link in the portlet instance. The user can click this link to browse all shared calendars, and can subscribe the portlet instance to any of these calendars.

This permission does not pertain to the user's ability to add a personal subscription to his or her My Calendar portlet instance. Users do not need a special permission for personal subscriptions.

Can Administer Calendars

The **Can Administer Calendars** permission allows the user to do the following:

- Create calendars in this portlet instance.
- Import items from a `.csv` file into a calendar.
- Access the **Manage Calendars** link (which lets you create calendars and import items).
- Edit calendars that were created in this portlet instance (their names and descriptions — but not their events).
- Delete calendars that were created in this portlet instance.

Can Administer Events

The **Can Administer Calendars** permission allows the user to do the following:

- Add events to existing calendars in this portlet instance.
- Edit and delete events that belong to the calendars in this portlet instance.

Though this permission is called **Can Administer Calendars**, it does not give users access to the wrench-icon menu. If you want to give a role permission to the wrench-icon menu, this can only be done by giving the role the **Can Admin** privilege for the context, which is a much bigger privilege overall (as described in "Letting a role administer a context" on page 603).

Granting a permission

To grant a role any of the instance-level permissions, use this procedure.

To grant an instance-level-permission:

1 Navigate to the appropriate portlet instance and click the wrench icon.

   The system displays the **Customize Portlet** *Calendar* screen, with the **Preferences** tab selected.

2 Click the **Permissions** tab.

   The system displays the **Define Permissions** screen, which lists all the roles defined for this context as well as all the global roles.

3 Locate the role(s) that should have portlet-level permissions. In the **Operations** column, select the corresponding checkboxes.

4 Click **Save**.

18

Campus Groups

The Campus Groups feature allows people with a shared interest to collaborate on the Campus Life tab of your portal.

In this chapter:

Key concepts

The Campus Groups feature lets individual users collaborate on topics of shared interest.

Here is how the process works: Users submit applications to create groups. These applications are reviewed by an administrator and, when an application is approved, the group is created. The person who applied for the group is automatically made its "leader." (Alternatively, an administrator can create a group, bypassing the application process.)

Each time a group is created, the system creates a context for the group in the Campus Groups sub-section of the Campus Life tab. The exact layout of each group's context is determined by the templates for Campus Groups, which are managed by your portal administrator.

Depending on the settings for the group, users may be able to proactively join, or they might have to wait to be added or invited by a group leader.

This section explains these concepts in more detail.

Group roles

Every group has at least two types of participants:

- Leaders — Leaders have administrative privileges, including the ability to add content to the context and the ability to add or invite new members.

- Members — Members have permission to visit and use the group's context.

Note that "Leader" and "Member" are actually context-specific roles, but membership in these roles is not managed through Context Manager — rather, you assign users to roles on the Manage This Group screen (described in "Navigating to the Manage This Group screen" on page 378).

It is also possible to create additional roles for the group. You create new roles through Context Manager — but as with the Leader and Member roles, you should assign members to context-specific roles through the Manage This Group screen.

The Campus Groups sub-section and portlet

The following features are key to Campus Groups functionality:

- The Campus Groups sub-section
- The Campus Groups portlet

The Campus Groups sub-section

The Campus Groups sub-section, on the Campus Life tab, is the location of all individual group contexts. It also includes tools for administrators to oversee groups.

The Campus Groups portlet

Throughout your portal, there are probably several instances of the Campus Groups portlet. This portlet lets users join groups, apply to create new groups, and more. Each instance of the portlet can be set up with one particular view type to encourage a particular type of use, such as browsing groups or applying to create groups. For more details, see "Setting up the Campus Groups portlet" on page 389.

Templates for the group contexts

The templates used for the layout of a group context may have been modified for your school, but this section describes the default templates installed by Jenzabar.

By default, the two Campus Groups templates (public and private) are very similar — they include the same pages and portlet instances. The pages are:

- Members Page — for all groups, viewable by members only.
- Group Directory — for all groups, viewable by members only.
- Discussion — for all groups, viewable by members only.
- Public Page — intended mainly for use in public groups, where it is viewable by both members and guests; more details are below.

Members Page

The Members page includes the following portlet instances:

- Announcements
- Calendar
- Bookmarks
- Custom Content ("About This Group")

- Handouts

For group members, this is the group's default page.

Only group members have the ability to view this page.

Group Directory

The Members page includes a Group Directory portlet instance, which lists all members of the group. Only group members have the ability to view this page.

Discussion

The Members page includes a Forums portlet instance. Only group members have the ability to view this page.

Public Page

The Public page includes the following portlet instances:

- Announcements

- Calendar

- Bookmarks

- Custom Content ("About This Group")

- Handouts

- Join Group

This page is available for guests to view. It is similar to the Members page except for the inclusion of the Join portlet instance, which lets new users join. For anyone who is not already a member of the group, this is the default page.

In the default setup of the private group template, this page exists but is essentially hidden from view (to all except leaders), because users are not allowed to proactively join and browse private groups. The page exists in private groups so that the group can easily be changed to a public group if necessary.

Categories

All campus groups are organized into categories. By default, the portal comes with several predefined categories, and new categories may have been created for your site.

Categories help users navigate the list of available public groups more easily. Categories also help administrators navigate the full list of both public and private groups in certain administrative views

For most users, categories are displayed only in the Browse Groups view of the Campus Groups portlet. For this reason, groups should be given names that make sense without anyone knowing which category they will belong to.

Applying to create a group

Use this section to apply for a group.

Attributes of a group

This section describes the attributes that a group has. When you apply to create a group, you will need to choose values for each of these categories.

Group Name

Group Name is a required field. The name will be used to identify the group in notifications sent to users, in the context created for the group, and, if the group is public, in the Campus Groups Directory.

Note that groups names usually are seen outside the context of the category that the group belongs to. So the name you suggest should make sense on its own.

Group Leader

The group application form does not include a field for group leader, but when you submit the application, you will automatically be suggested as the group leader. It is possible for the administrator to change this after approving the group. However, if that does not happen, you will be the leader, which means you will be responsible for the group. If desired, once the group is created, you can designate someone else as a co-leader. After doing that, you can also demote yourself to being a member (or you can drop the group).

Group Category

Each group must be assigned to a category that describes the general purpose of the group. If it is a public group, the Category classification will help other users find the group when they are browsing the Campus Groups Directory.

Public or Private

Each group must be classified as either public or private. This designation affects whether the group is listed in the Campus Groups Directory, and how people become members in the group.

Public groups

A public group is one that is listed in the Campus Groups Directory and which can have any of several membership options. These options are described in "Public Group Enrollment" on page 376.

Private groups

A private group is one that is not listed in the Campus Groups Directory and which has only one style of membership, which is that members are added manually by the leaders. This is similar to

the "invitation" style of membership seen in public groups, except that people added to private groups do not have to actively accept an invitation — when they are added by the leader, they simply receive a notification that they have been added.

Public Group Enrollment

Public group enrollment is relevant only if the group is public. The options are:

- Open, no application required — Any user can proactively join the group and instantly become a member. Each time this happens, the leader gets a notification indicating who has joined.

- Open, by membership application — Any user can submit an application for membership, and if the application is approved by the group's leader, the applicant becomes a member. Note that the system always presents the same application; it is essentially a form that asks why the user wants to join. However, for each group, the application's introductory text can be customized (by changing the **Application to Join** template, as described in "Working with message templates for a group" on page 380). If the group leader needs to collect specific data as part of the application, it might be a good idea to provide a detailed list in the introductory text.

- Open, by invitation only — A user can become a member only if he or she receives an invitation from the group's leader. The invitee then must accept the invitation to become a member, by visiting the Join Group portlet on the inviting group's Public Page, or visiting a Campus Groups portlet listing the users's current groups and clicking on the **Join Now** link provided there. Note that each group has an invitation template that can be customized on a case-by-case basis (the **Invitation to Join** template, described in "Working with message templates for a group" on page 380).

- Closed to new members — No one can join the group. At the time the group is created, this might be an appropriate choice if the leader(s) need time to set up the group's pages or if they want to do some other prep work prior to accepting members.

Maximum # of members

When the maximum number of members has joined a group, the system automatically closes the group to new members. You can also manually close a group at any time by editing its membership settings (described in "Managing membership settings" on page 379). This is an optional setting.

Description

This description offers more details about the group. This description is displayed only to administrators reviewing the group's data.

Submitting the application

Use this procedure to submit an application for a new group. After you do this, an administrator will review your application and can decline or accept the application, with or without changes.

To apply to create a group:

1 Log in to the portal and navigate to an instance of the Campus Groups portlet. In the default setup of the portal, there is a Campus Groups portlet instance in your My Pages context.

2 Click **Create New Campus Group**.

The system displays a form.

3 Fill out the form as appropriate. If you need help with any field, see "Attributes of a group" on page 375.

4 After you have filled out the form, click **Submit Application**.

The system submits your application for review and displays an on-screen message stating as much. You will also received an automated e-mail or Message Center notice saying this. Later you will received another message specifying whether the application has been approved or rejected.

Managing individual groups

This section explains certain tasks you might need to complete if you are the leader of a group.

Navigating to the Manage This Group screen

In order to take several types of administrative actions with a group, you use the Manage This Groups screen.

Generally, you use this portlet instance to do any of the following —

- Modify message templates that are specific to the group.

- Modify the membership settings for the group by:
  - Changing the maximum number of group members.
  - Making the group public or private.
  - If the group is public, changing the requirements for enrolling in the group.

- Manage the actual membership of the group by doing any of the following:
  - Adding members instantly to the group (if it is private).
  - Inviting members (if the group is public), rescinding an invitation, or re-sending one.
  - Dropping a member from the group.
  - Assigning a member to the Leader role (or another role).

- View pertinent users lists, including:
  - A list of all members and the dates that they joined the group.
  - A list of users who have applied for membership (if this is an application-only group).
  - A list of users who have been invited to join.

To navigate to the Manage This Group screen:

1 Navigate to the context for the appropriate group. For example, you can do this by clicking the name of the portlet within the My Groups portlet instance on your My Pages tab.

The system displays the default page of the course context.

2   In the left-hand sidebar, click the link that says **Manage This Group**.

The system displays the Manage This Group screen.

Managing membership settings

At times you may want to change the membership settings for a group, such as whether or not the group is public or private, the maximum number of members, and so forth. Use this procedure to make any of these types of changes.

To manage membership settings for a group:

1   Navigate to the Manage This Group screen, as described in "Navigating to the Manage This Group screen" on page 378.

2   Choose **Manage** > **Edit Membership Settings**.

The system displays a form that lets you make the group public or private, or change the maximum number of members. If the group is public, you can also change the enrollment settings for the group. For help understanding any of the options, see any of the following sections:

- "Public or Private" on page 375
- "Public Group Enrollment" on page 376
- "Maximum # of members" on page 376

3   Make any changes that are necessary.

4   Click **Save**.

Working with message templates for a group

When you take certain actions while managing a group, the system sends notifications to affected users and in some cases displays useful messaging on the screen.

For these messages, the system stores boilerplate text known as templates. In some cases, you have the option of tailoring a particular message before it is sent, but it's still a good idea to maintain templates with acceptable general text. The system installs templates for you, and you can modify them if appropriate.

Note that the system will honor the following variables in the template text:

- `@@GroupName` — Will be replaced with the name of the group.

- `@@GroupWebAddress` — Will be replaced with a link to the group context.

With messages that are to be sent (as opposed to being displayed on screen), the system will first attempt to send the message as an e-mail. If the recipient does not have a valid e-mail address, or if it is an e-mail address that the system cannot deliver to, the message will be sent to the user's Message Center.

The available message templates are described below.

Name of template	Description	Modifiable on a case-by-case basis?
Group Membership Acceptance Message	Sent to let a user know that his or her application to join a group has been accepted.	Yes
Group Membership Declined Message	Sent to let a user know that his or her application to join a group has been declined.	Yes
Application to Join	Displayed on screen as an introduction to the application form (for a public group that has application-only membership).	No
Application Confirmation	Displayed on screen after the user submits an application.	No
Invitation to Join (available for public groups only)	Sent to let a user know that he or she has been invited to join a group.	Yes
Add Member to Private Group (available for private groups only)	Sent to let a user know that he or she was added to a group.	Yes

To manage message templates for a group:

1   Navigate to the Manage This Group screen, as described in

2   Choose **Manage** > **Edit Outgoing Messages**.

The system displays a form that lets you modify any of the message templates.

3   Make any changes that are necessary.

4   Click **Save**.

Working with invitations (public groups only)

With any public group, you can invite users to join. Obviously, this is an important procedure if the group is invitation-only, but you can invite users to join any public group, as long as it has not been closed.

If you are looking for information on how to add members to a private group, see "Adding members instantly (private groups only)" on page 387.

Sending an invitation

When you send an invitation to one or more users, the system does each of the following:

- Sends the invitation to the user(s) you chose.

- Adds the group to the user's list in the "My Groups" view of the Campus Groups portlet. The invitee will see a link to the public page of the context, plus a **Join Now** link. (When the user clicks the **Join Now** link, he or she is automatically added to the group.)
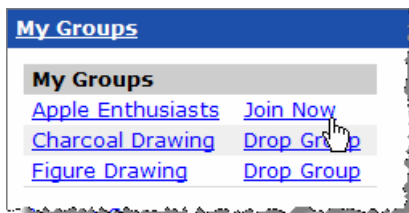
To send an invitation:

1 Navigate to the Manage This Group screen, as described in "Navigating to the Manage This Group screen" on page 378.

2 Click **Send an Invitation**.
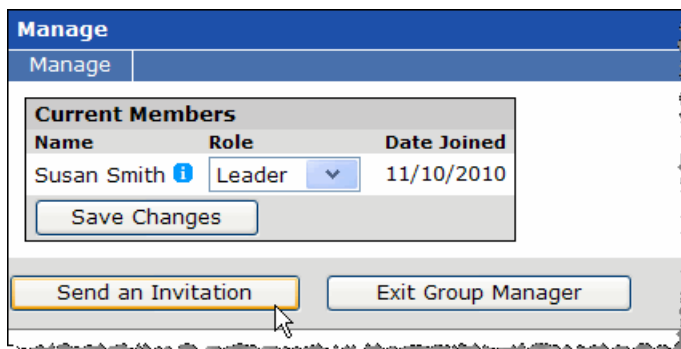
The system displays a form.

3   Click **Add Individual Users**.

The system displays the **Select Users** dialog box.

4   Using the dialog box, select the users you want to invite (by moving them into the **Selected Users** column). When finished, click **OK**.

The system again displays the invitation form, now with messaging that indicates the number of users you selected to receive the invitation. If you need to make any changes to the list of names, click **Edit Users** to modify it.

5   In the text field, note the system displays the message invitation template text that you currently have saved for this group (in the **Invitation to Join** template, described in "Working with

message templates for a group" on page 380). If you want to tailor the message for this particular invitation, go ahead and do so.

6   Click **Invite Selected Users to Join Group**.
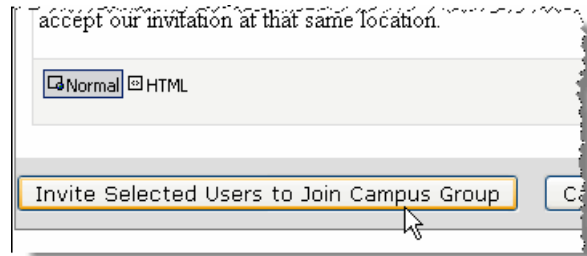
The system sends a message to the invited user(s) and adds the group link to their "my groups" list.

Reviewing the list of invitees and related tasks

After you've sent one or more invitations, you may want to do any of the following:

- Review the list of users that you have invited.

- Re-send an e-mail invitation to anyone on the list.

- Remove an invitation that you have already sent. Note that the system will not send a notification to the user about a removed invitation, but the group listing, with its **Join Now** link, will be removed from the user's My Groups view.

To review the list of invitees and make changes:

1   Navigate to the Manage This Group screen, as described in "Navigating to the Manage This Group screen" on page 378.

The default view of this screen includes a list of members, followed by a list of invited members (if any exist).

2   If desired, do any of the following:

*   To remove any invitation, locate the appropriate person and click the corresponding **Remove** link.

*   To re-send an invitation, locate the appropriate person and click the corresponding **Re-invite** link.

*   If you want to remove or re-send multiple invitations, use the checkboxes at the left to select the appropriate people, then click either **Remove Selected** or **Re-invite Selected**.

Reviewing and processing applications for membership

If a group is open to new members by application only, at some point a leader or administrator will have to review applications and reject or accept each of them.
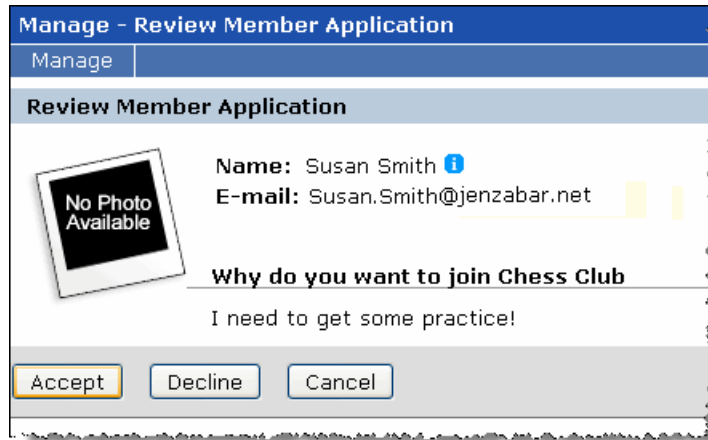
To review and process applications for membership:

1   Navigate to the Manage This Group screen, as described in "Navigating to the Manage This Group screen" on page 378.

The default view of this screen includes a list of members followed by a list of prospective members (if any exist) — these are people who have submitted applications.

2   Locate the person whose application you want to review. Click the corresponding **Review Application** link.
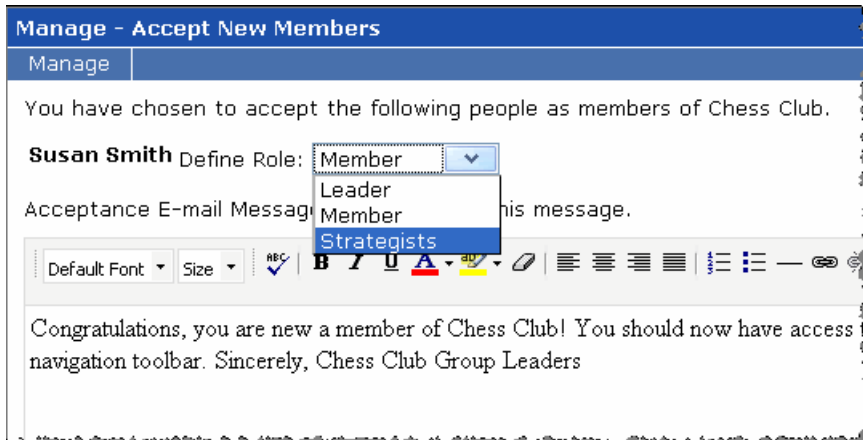
The system displays the information that the applicant submitted.

3 Do one of the following as appropriate:

- To accept the applicant, click **Accept**.
- To decline the applicant, click **Decline**.

The system displays a screen with text field that contains a message for the applicant. Depending on which option you chose in step 3, this is either template text for an accepted or declined user, as appropriate. (For more details on these templates, see "Working with message templates for a group" on page 380.)

If you are accepting the applicant, note that the screen also includes a drop-down list that lets you assign the user to a particular role, if desired.

4 If appropriate, do either or both of the following:

- Tailor the text in the message field.
- If you are accepting a member and want to assign the person to the Leader role or another context-specific role, use the drop-down list to do this.

5 At the bottom of the screen, click either **Accept New Members** or **Decline Membership**, as appropriate.

Adding members instantly (private groups only)

The only way to add members to a private group is to add them instantly through the Manage This Group screen. When you do this, the system sends a notice to the member that he or she was added.

If you are looking for information on how to invite members to a public group, see "Working with invitations (public groups only)" on page 382.

To add members instantly:

1 Navigate to the Manage This Group screen, as described in "Navigating to the Manage This Group screen" on page 378.

2 Click the **Add New Members** button.

The system displays a form.

3 Click **Add Individual Users**.

The system displays the **Select Users** dialog box.

4 Using the dialog box, select the users you want to invite (by moving them into the **Selected Users** column). When finished, click **OK**.

The system again displays the original form, now with messaging that indicates the number of users you selected to add. If you need to modify the list of names, click **Edit Users** to make changes.

5 If you want to make any changes to the message, go ahead and make them. (Note that the default text comes from the **Add Member to Private Group** template, described in "Working with message templates for a group" on page 380.)

6 Click the button labeled **Add New Selected Users to Private Group and Notify**.

The system adds the new members and sends them notifications.

Other tasks

Use the procedures in this section to accomplish other tasks in your public and private groups.

Dropping members

Members can proactively leave groups, or a leader/administrator can drop members. This procedure explains how to drop them.

Note the following:

• When you drop a member, the system does not send that person a notification.

- You cannot drop a leader from a group. If you really want to drop a leader, you should first reclassify the person as a Member, or as another role (using the **Role** drop-down list, described in "Changing a member's role," below).

To drop members from a group:

1 Navigate to the Manage This Group screen, as described in "Navigating to the Manage This Group screen" on page 378.

2 In the list of members, locate the person you want to drop and click the corresponding **Drop Member** link.

The system displays a dialog asking if you are sure you want to drop the member.

3 Click **OK**.

The system drops the person from the group.

Changing a member's role

At times you may want to change a member's role. Use this procedure to do so.

To change a member's role:

1 Navigate to the Manage This Group screen, as described in "Navigating to the Manage This Group screen" on page 378.

2 In the list of members, locate the person whose role you want to change. Using the **Role** drop-down list, choose the appropriate role.

3 Click **Save Changes**.

Managing the layout of the group's context

If you need to make any changes to the layout for a particular group's context, you can do so just like you would in any other context. For details, see Chapter 34, "Managing the layout of a context."

Monitoring usage of a group context

If usage-statistics logging has been activated, then you can check the Usage Statistics portlet to see which members of the group are most active, and so forth. For details on the Usage Statistics portlet, see Chapter 29, "Usage Statistics."

Setting up the Campus Groups portlet

The Campus Groups portlet offers users the ability to browse groups, join groups, and much more.

The setup options

For each instance of the portlet, you choose a default view — My Groups, Browse Groups, or New Group Application.

Note that Campus Groups portlet instances located in a user's My Groups context will always show the My Groups View.

My Groups View

The My Groups view lists the groups to which the currently logged-in user belongs.

From this view, the user can click the name of any group to go directly to the context for that group. Next to each group listed is a label that says either **Drop Group** or **Sole Leader**.
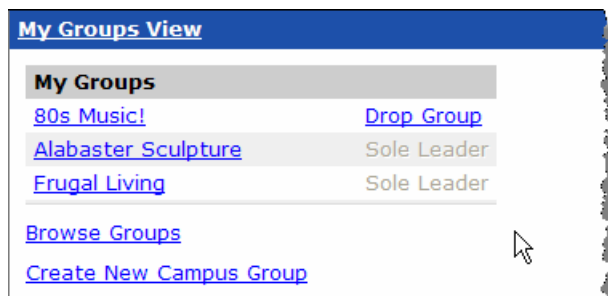
If the **Drop Group** link is displayed, that means that the logged-in user is either a member of the group or one of multiple leaders (in either case, the user can drop the group, if desired).

If the **Sole Leader** label is displayed, the user is the only leader of the group, and dropping the group is not allowed.

Note that this view also includes a link to the two other views (Browse Groups View and New Group Application View).

Browse Groups View

The Browse Groups View lists all public groups.

From this view, the user can click the name of any group to go directly to the context for that group. If the group is currently open to new members, a link for joining is provided.
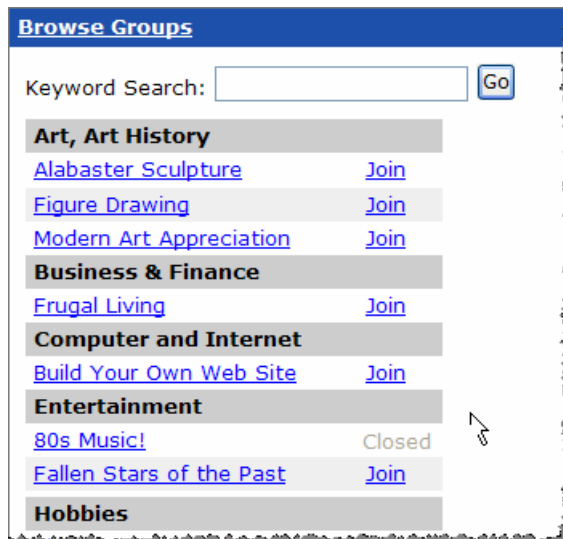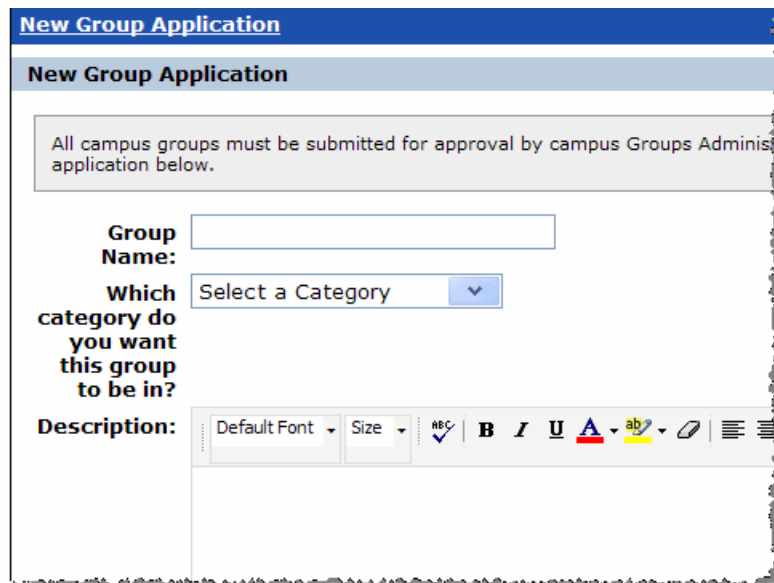
When on-screen messaging in JICS mentions the "Campus Groups Directory," this is typically the view that is being referred to.

New Group Application View

The New Group Application View shows the application form used by people who want to propose new groups.

This view is intended to be used either on a page of its own, or within a wide column. This is because with this view, the portlet instance extends to a broader width than it would otherwise.

Choosing a view

This procedure explains how to set up the Campus Groups portlet with a particular view.

To choose a view for a portlet instance:

1 Navigate to the appropriate portlet instance and click the wrench icon.

2 Click the **Settings** tab.

The system displays a screen with the heading **Default View Type**.
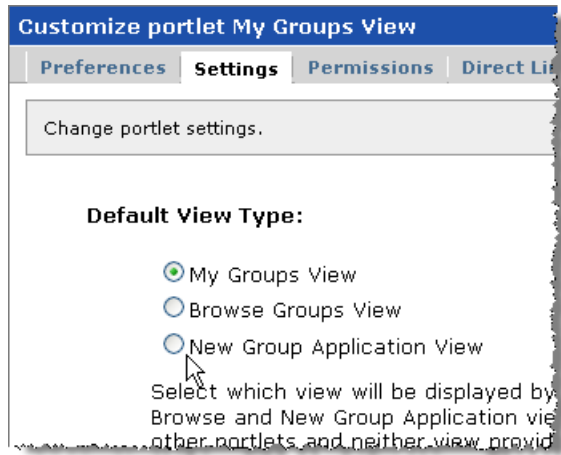
3   Select the appropriate view.

4   Click **Save**.

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Chat

This chapter explains how to manage the Chat portlet.

In this chapter:

- Key concepts
- Managing a Chat portlet instance
- Managing permissions

Key concepts

The Chat portlet is a chatroom powered by a third-party application called Zbit. Note that the user must enable pop-ups in order to use the Chat portlet.

Portlet basics

Within each instance of the Chat portlet, you can create rooms targeted toward specific topics. Individual users can then enter the room and chat. When a user goes to the Chat portlet instance, he or she sees a list of the rooms that exist, with a notation about the number of conversations that each hosts.
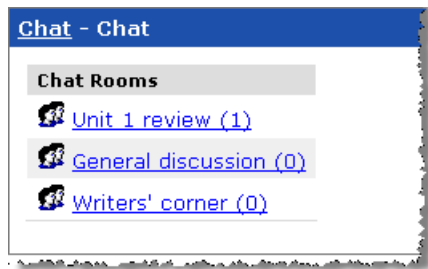
The user can click the name of any room to display a pop-up window for viewing discussions and entering comments.
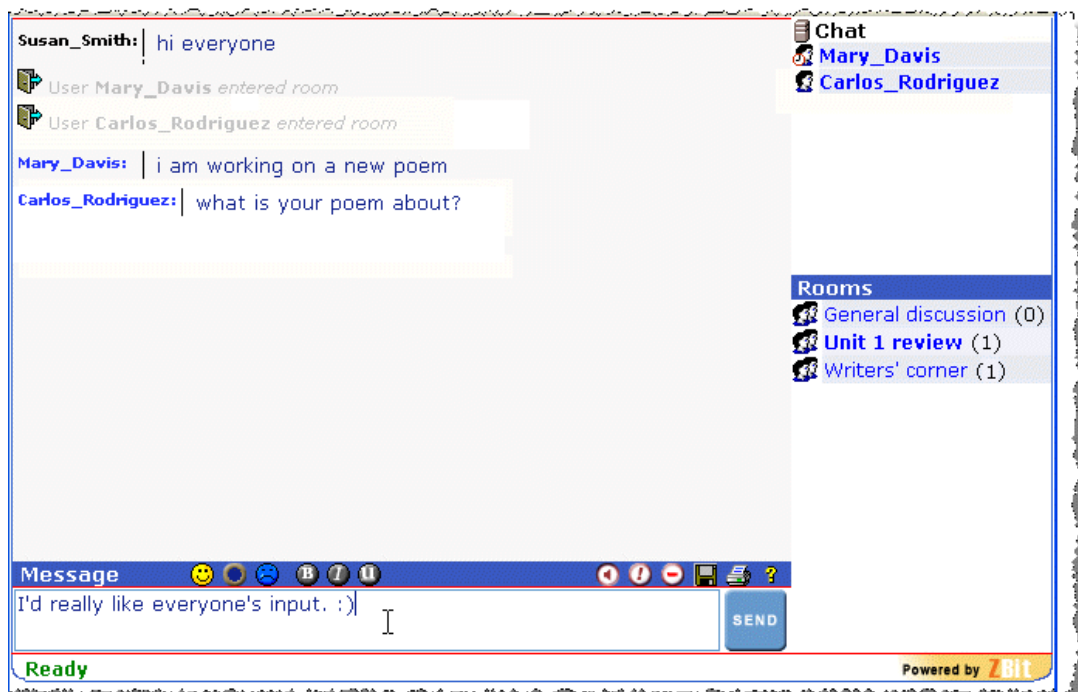
Users can click the yellow question mark over the Send button if they want to display Zbit's online help.

Although they are documented in the Zbit online help for the Chat tool, the following chat functions are not supported by JICS:

- Moderated chat rooms

- Private chat rooms

- Invitations

- Room security

Default location

The default layout for course contexts includes an instance of the Chat portlet on the Collaboration page. If desired, you may be able to create additional instances. If you need help with adding a portlet to a page, see "Creating a portlet instance" on page 571.

Managing a Chat portlet instance

You manage an instance of the Chat portlet using the Admin Chat pop-screen. You access this by clicking the **Admin Chat** link.

Chat - Chat

Chat Rooms

Unit 1 review (1)

General discussion (0)

Writers' corner (0)

Our chat rooms open in a pop-up window. You m
up blocker (or set it to accept pop-ups from this

Admin Chat

NOTE: The Chat Admin only works in Internet Exp
OS.
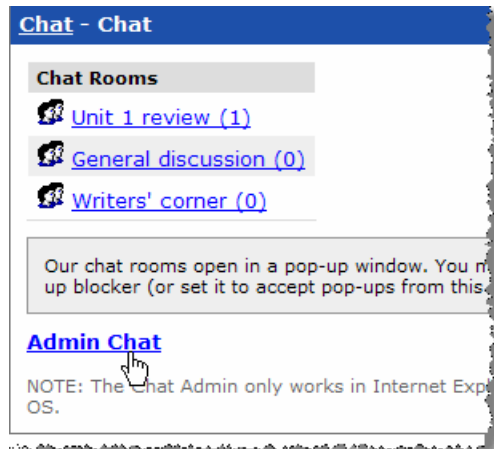
Clicking this opens an administrative console.

Global Functions				**Message to ALL users:**			

	Site Rooms							
	Id	**Name** (user count) [owner]	**Room Topic**	**Attributes** priv mod pers	**Delete**	**Manage**	**Erase Messages**
Room List:	64	Unit 1 review (0) [Susan_Smith]	This room is for reviewing the material from Unit 1.	- - P	🗑	📝	📋
	62	Writers' corner (1) [Susan_Smith]	This room is for discussing current writing projects	- - P	🗑	📝	📋
	65	General discussion (0) [Susan_Smith]	This room is for general discussion	- - P	🗑	📝	📋
New Room:	**Room name**			**Is Moderated**		items in **bold** are required
	Room Topic					create

	Room Users					
Chatting Users	**Name**	**IP**	**Kick**	**Ban**	**Kick & Ban**	**Unban**
	No users found in the room.					
Banned	**Name**				**Unban**	

You can use this console to do tasks such as the following:

- Create and delete chat rooms.

- Block and unblock users from a chat room.

- Erase messages from a chat room.

Managing permissions

For each instance of the Chat portlet, you might want to give a role permission to monitor chat activity. You do this by giving users the **Can Admin Chat** permission. People with this permission can ban offensive users, among other management tasks.

Note that if you want to give a role permission to display the wrench-icon menu, this can only be done by giving the role the **Can Admin** privilege for the context, which is a much bigger privilege overall (as described in "Letting a role administer a context" on page 603).

To manage permissions for the Chat portlet:

1   Navigate to the Chat portlet instance that you want to configure.

2   Click the wrench icon.

The system displays the **Customize Portlet *Chat*** screen, with the **Preferences** tab selected.

3   Click the **Permissions** tab.

The system displays the **Define Permissions** screen, which lists all the roles defined for this context, as well as all the global roles.

4   Locate the role that should be able to administer this instance of the Chat portlet. Select the corresponding checkbox in the **Can Admin Chat** column.

5   Click **Save**.

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Course Search

If you have access to the Course Search portlet, you can use it to display details about specific course sections. This might be useful if you want to review details about sections taught by other faculty members.

In this chapter:

- Key concepts
- Displaying details about course sections

Key concepts

The Course Search portlet lets both you and your students search for course sections and display details about them.

Information displayed

When you search for course sections, the portlet displays the following details about each section:

- Its code.

- The name of the course.

- The term (if you did not enter it as part of the search criteria).

- The faculty member who teaches or taught it.

- Its schedule.

- Optionally, the description for of the associated course, if a description exists.

The portlet finds both those course sections that were created in the ERP system and those that were created in the portal (as described in "Creating portal-only courses" on page 611).

Note that if a course section was created within the ERP system but never imported into the portal, this portlet will not return results about it

Default location

By default, the Course Search portlet is located on the main page of the Academics tab. If desired, you may be able to create additional instances. If you need help with adding a portlet to a page, see "Creating a portlet instance" on page 571.

Displaying details about course sections

Use this procedure to display details about one or more course sections.

To display details about course sections:

1   Navigate to the Course Search portlet.

2   In the Course Search portlet, enter your search criteria. Make sure you set the **Term** drop-down list to the appropriate term or choose **All**.

3   If appropriate, click the **Show Course Descriptions** checkbox.

4   Click **Search**.

    The system returns the results that match your search criteria. Note that, for any item in the search results, you can do either of the following:

    •   Click the course name to display the main page of the course context (if you have permission to view it — which as a faculty member, you most likely will). If a user does not have access to view the main page, the system displays the **Course Information** page instead.

    •   Click the blue "i" icon to display the My Info pop-up for the faculty member.

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Coursemates

By default, your course context includes a Coursemates portlet, which includes a list of everyone associated with the course section. This chapter describes how to work with this portlet.

In this chapter:

- Key concepts
- Adjusting your view
- Sending e-mail to members of a course
- Displaying a printable course roster
- Managing permissions

Key concepts

This section offers an overview of the Coursemates feature.

Portlet basics

The Coursemates portlet is actually an instance of the Group Directory portlet. This details does not necessarily have any import but is mentioned in case a technical issue comes up that you need to troubleshoot.

Default locations

The default layout for course contexts includes a Coursemates portlet instance on the Collaboration page.

Adjusting your view

While using the Coursemates portlet, you can adjust your own personal view of the portlet by making faculty members' names highlighted.

To add highlighting to faculty members' names:

1   Navigate to the Coursemates portlet and click the wrench icon.

2   Click the **Preferences** tab.

3   Select the checkbox labeled **Highlight Faculty/Leaders**.

4   Click **Save**.

5   Click **Exit**.

The system now highlights faculty members (within your personal view).

Sending e-mail to members of a course

Use the procedure below to send an e-mail to some or all members of a course section.

Note that e-mail will be delivered only to those faculty members and students who have entered e-mail addresses into the My Info portlet. See the My Info portlet online help for details about changing e-mail addresses.

You can also send e-mail to students from the printable roster for the course section, which is described in "Displaying a printable course roster" on page 405.

To send e-mail to members of a course section:

1   Navigate to the Coursemates portlet.

2   Do any of the following:

- To send e-mail to everyone in the class —
  a   Check the checkbox labeled **Select All**.
  b   Click **Open E-mail**.
- To send e-mail all of the course section members who belong to a particular role —
  a   Select the appropriate role in the **E-mail All** drop-down list.
  b   Click **Open E-mail**.
- To send e-mail to one or more selected members —
  a   Using the checkboxes next to people's names, select the recipients for your e-mail.
  b   Click **E-mail Selected Members**.

    The system opens an e-mail form.

3   Fill out the form as appropriate. Note that you have option of uploading an attachment that is smaller than 2MB.

4   Click **Send**.

Displaying a printable course roster

If you need a printable version of the students enrolled in a course section, display the course roster.

To display the course roster:

1   Navigate to the Coursemates portlet.

2   Click **View Printable Roster**.

    The system displays a printable list of all the students in the course along with their ID numbers. Note that from this page you can also send e-mail or display any student's My Info portlet.

Managing permissions

By default, only members of the Faculty role can view the printable roster for a course section. However, you may want to give this permission to members of other roles.

To allow roles to display the printable roster:

1 Navigate to the Coursemates portlet.

2 Click the wrench icon.

The system displays the **Customize Portlet** *Coursemates* screen, with the **Preferences** tab selected.

3 Click the **Permissions** tab.

The system displays the **Permissions** screen.

4 Locate the role that should be able to view the printable roster. Select the corresponding checkbox in the **Can View Printable Roster** column.

5 Click **Save**.

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Custom Content

You can use the Custom Content portlet to publish text, images, and other content that might be useful to students (or others).

In this chapter:

Key concepts

The Custom Content portlet is used to display text, images, video, or content hosted by another URL.

Content you can add

There are a few different types of content that you can add to a Custom Content portlet.

Elements

If you want to add text or images to a Custom Content portlet instance, you create an element. You might also create an element if you want to embed a video into the portlet instance

Remote content

In some cases, you may have the ability to add remote content to an instance of the portlet. With this feature, the portlet essentially acts as a window into another URL. With this feature, as with elements, you can set up the portlet instance to host video.
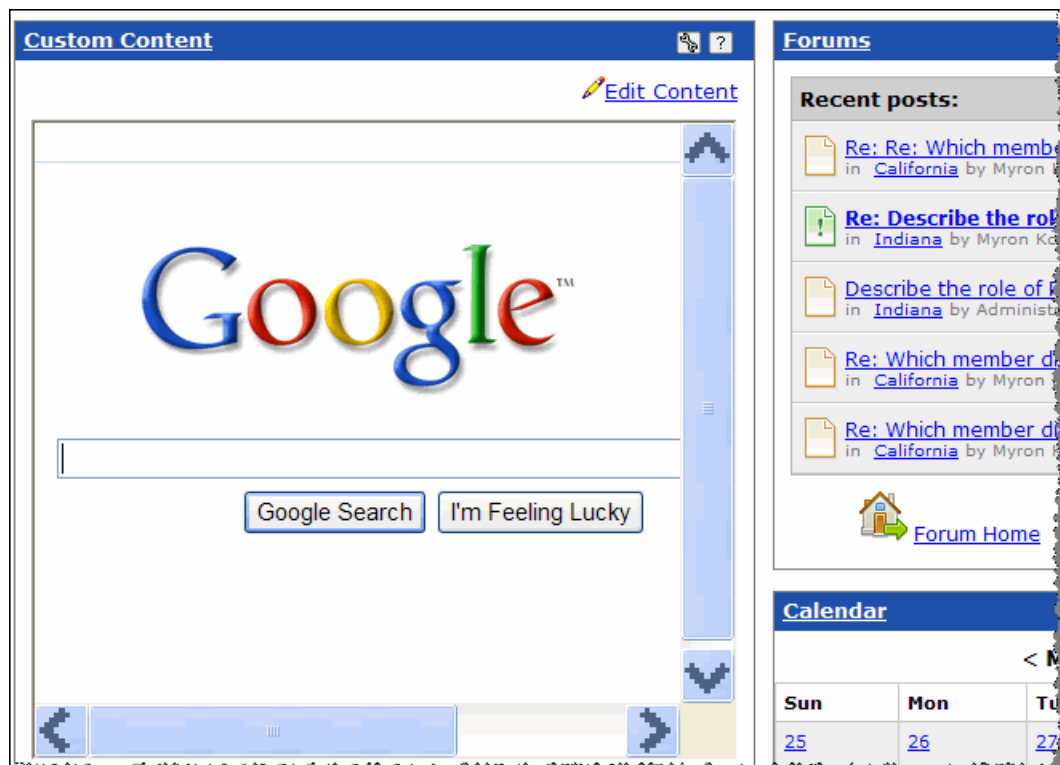
Your ability to add remote content varies depending on whether you have the **Can Add Remote Content** global portlet operation. You will know you have this permission if you see, within the Custom Content portlet, a link labeled **Show external remote content**.
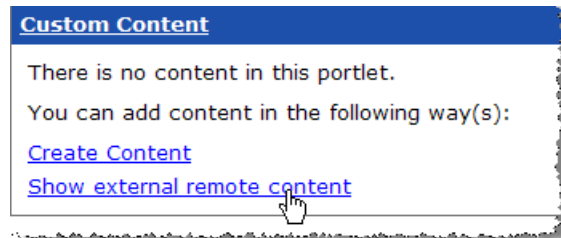
If you do not have this permission and you think that you should, speak with an administrator for your portal.

Uploading files from the web server

In some cases, you may have the ability to upload an HTML or text file to an instance of the portlet.

Your ability to add remote content varies depending on whether you have the **Can Upload Content from Server File** global permission. You will know you have this permission if you see, within the Custom Content portlet, a link labeled **Load from Server File**.

If you do not have this permission and you think that you should, speak with an administrator for your portal.

Default locations

By default, the portal includes several Custom Content portlet instances. The following are a few that you will have permission to help manage:

- By default, you course context includes two instances of the Custom Content portlet — one called "About this Course" and another called "Course Syllabus."

- If you manage a Campus Group, the context for your group is created with a Custom Content portlet instance on its default page.

If desired, you may be able to create additional instances. If you need help with adding a portlet to a page, see .

Course Syllabus

The "Course Syllabus" portlet is intended to be a place where you can create a version of your syllabus that students can display in their browser window, without opening a file. This portlet by default is located on the Syllabus page.

Note that the default setup of this page includes a portlet called "Downloadable Version," which is intended as a place for you to post a downloadable version of the same details entered in the Course Syllabus portlet. The Downloadable Version portlet is technically a Handouts portlet, so if need help using it, see Chapter 24, "Handouts."

About this Course

The "About This Course" portlet is intended to offer students a quick overview of the course section. By default, this portlet is located on the main page of your course context. You might use it to post your office hours and details about where your class meets.

Working with elements

This section describes how to add elements to a Custom Content portlet instance, how to modify them, and so forth.

Adding an element

Use this procedure to add an element to a Custom Content portlet instance.

Note that there is no preview functionality with this feature — as soon as you click **Save**, your element will be viewable to anyone who has the ability to display the portlet instance. For this reason, you should proofread your text carefully before you save, make sure you are uploading the correct image, and so forth.

To add an element:

1   Navigate to the appropriate Custom Content portlet instance.

The portlet should display a link with one of the following labels:

- **Add Content**
- **Edit Content**

2   Do one of the following:

- If the **Add Content** link is displayed:

  a   Click **Add Content**.

  The system displays the **Add a new element** screen.

  b   Skip ahead to 3.

- If the **Edit Content** link is displayed:

  a   Click **Edit Content**.

  The system displays a screen that summarizes the elements already on the page.

  b   Click **Add a new element**.

  The system displays the **Add a new element** screen.

3   If you want the element to have a heading, enter the appropriate text in the **Header Text** field.

4   If you want the element to include an image, use the **Browse...** button to locate the image. Use the image placement radio buttons to specify the alignment of the image.

5   Enter the body text in the **Text** field. Note also that you can use this field to include code that links directly to a video that is posted on the Internet or elsewhere.

6   Click **Save**.

Reordering elements

After you create a few elements, you may want to rearrange them.

To reorder elements:

1   Navigate to the appropriate Custom Content portlet instance.

2   Click the **Edit Content** link.

   The system displays a screen that summarizes the elements on the page.

3   Use the text boxes at the left to specify the correct sequence of the items.

4   To finalize your choices, click **Reorder elements**.

Modifying an element

After you create an element, you might want to change its text, upload a different image, change the position of the image, and so forth. To make these sorts of changes, use the procedure below.

To modify an element:

1   Navigate to the appropriate Custom Content portlet instance.

2   Click the **Edit Content** link.

   The system displays a screen that summarizes the elements on the page.

3   Locate the element you want to modify and click the corresponding pencil icon.

   The system displays the **Edit Element** screen.

4   Change any of the fields as appropriate.

5   Click **Save**.

Deleting an element

Use the procedure below to delete an element.

To delete an element:

1   Navigate to the appropriate Custom Content portlet instance.

2   Click the **Edit Content** link.

   The system displays a screen that summarizes the elements on the page.

3   Locate the element you want to delete and click the corresponding trash barrel icon.

   The system generates a dialog asking whether you are sure you want to delete the element.

4   Click **OK**.

Working with remote content

This section describes how to add elements to a Custom Content portlet, how to modify them, and so forth.

The Custom Content portlet should allow you to enter any URL, but some Internet sites may cause problems for users. In some cases, a URL may try to break out of the frame that the system puts it in. In these cases, when a user displays the page hosting the Custom Content portlet, the system will present the user with a dialog box asking if they want to navigate away from the site. In general, these types of URLs should not be used with the Custom Content portlet.

Adding remote content
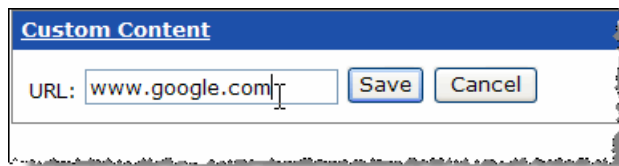
Use this procedure to add remote content.

To add remote content:

1   Navigate to the appropriate Custom Content portlet instance.

2   Click the link labeled **Show external remote content**.

The system displays a screen that includes a field labeled URL.

3   In the URL field, enter an address. For example, you can reference an HTML file stored on your school's web server or an Internet site. The system will automatically add an `http://` prefix if you do not type one in.

Custom Content

URL: www.google.com   [Save]   [Cancel]

4   Click **Save**.

Modifying or deleting remote content

Use this procedure to modify or delete remote content.

To modify or delete remote content:

1   Navigate to the Custom Content portlet instance that is hosting remote content.

2   Click the link labeled **Edit Content**.

The system displays a form where you can edit the URL you chose.

3   Do one of the following:

- If you want to change the link, edit the text in the **URL** field.
- If you want to remove remote content from this portlet instance, delete everything in the **URL** field.

4   Click **Save**.

Working with content from the web server

If desired, you can use the Custom Content portlet to host a file stored on your web server, such as an HTML file or a text file.

Uploading content
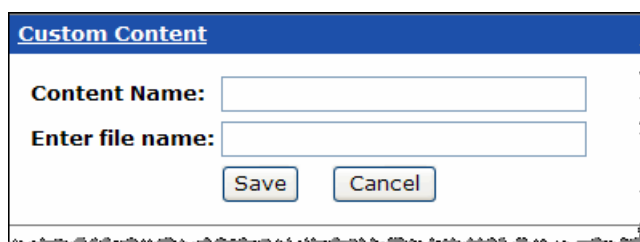
To upload content from the web server, first you place the file in the `ClientConfig/CustomContent` directory, then you enter the name of the file in the portlet instance.

To upload content:

1   Log in to the web server and verify that the file you want to upload is in the `CustomContent` folder. By default, this folder is at the following location:

    Drive:\Program Files\Jenzabar\ICS.NET\Portal\ClientConfig\CustomContent

2   Open a browser. Log in to JICS and navigate to the appropriate Custom Content portlet instance.

3   Click the link labeled **Load From File Server**.
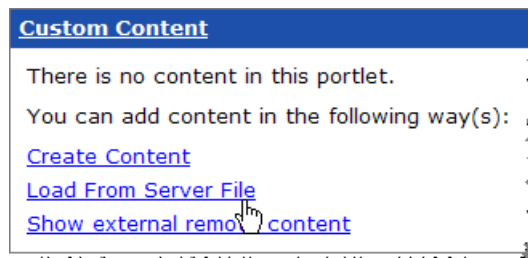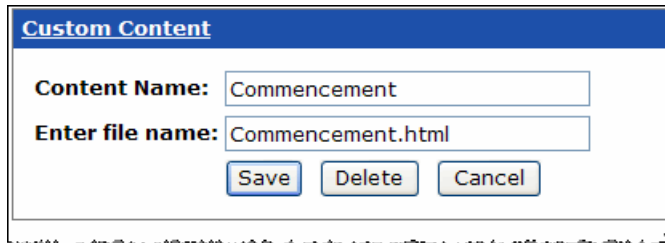
The system displays a form.

4   In the **Content Name** field, enter a name that describes the file. This name is used internally and is not displayed for end users.

5 In the **Enter file name** field, enter the name of the file. Do not enter the path — the system assumes that the file is in the `CustomContent` directory.

6 Click **Save**.

The system again displays the portlet instance, this time with your file referenced. The example below shows a text file that contains an embedded a link to `.jpg` file that is also stored on the web server.
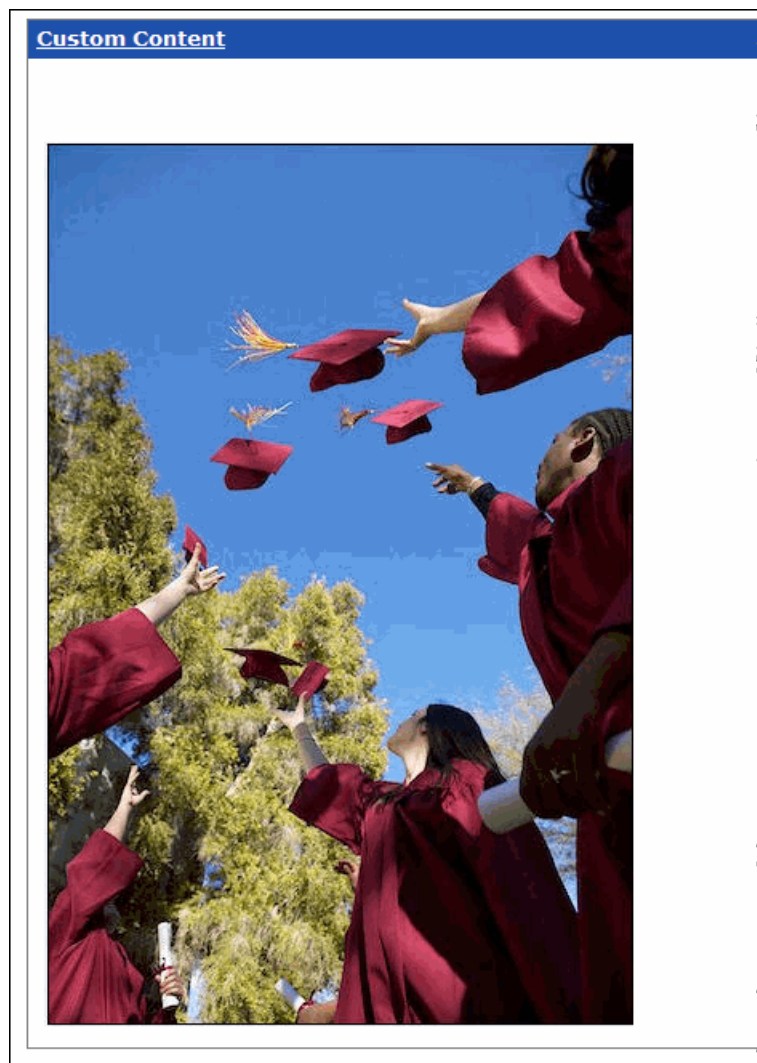
Removing uploaded content

Use this procedure to replace or delete content that you uploaded from the web server.

To remove content that you uploaded from the web server:

1 Navigate to the appropriate Custom Content portlet instance.

2 Click the link labeled **Edit Content**.

   The system displays a form.

3 Do one of the following, as appropriate:

   • To remove the content, click the **Delete** button.

   • To replace the content, edit the **Enter file name** field. Replace the text with the name of whatever file you want to reference, then click **Save**.

Managing permissions

You grant a role the instance-level **Can Edit Custom Content** permission if you want the role to have the ability to add and modify content in the portlet instance. Doing this automatically gives the role permission to work with elements (as described in).

If you also want the role to be able to work with remote content or with files uploaded from the web server, the role must have the **Can Add Remote Content** or **Can Upload From Server File** global portlet operations. Check with an administrator if you need assistance with this.

To let a role manage elements in a Custom Content portlet instance:

1   Navigate to the appropriate Custom Content portlet instance.

2   Click the wrench icon.

   The system displays the **Customize Portlet** *Portlet name* screen, with the **Preferences** tab selected.

3   Click the **Permissions** tab.

   The system displays the **Permissions** screen.

4   Locate the role that should be allowed to manage elements. Select the corresponding checkbox in the **Can Edit Custom Content** column.

5   Click **Save**.

   When a member of this role navigates to an empty instance of the Custom Content portlet, he or she will now see the **Create Content** link, which allows the user to create elements.
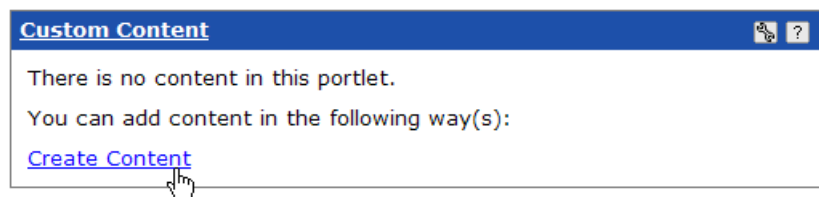
   If the user also has the one or more global portlet operations, the user will also see the appropriate links. For example, the illustration below is what the user would see if he or she also had the **Can Add Remote Content** global portlet operation.

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Forums

This chapter explains how to set up an instance of the Forums portlet.

In this chapter:

Key concepts

The Forums portlet lets students and other users engage in conversation. This portlet is ideal for classroom discussions and other types of collaboration.

This section offers a short overview of the Forums portlet. It may be useful to review this section before setting up the portlet.

Categories and topics

Within a portlet instance, all conversation is organized into **categories** and sub-categories, which are called **topics**. So, for example, a category might be "Hemingway," and topics in that category might be "The Sun Also Rises," "The Nick Adams Stories," and "A Call to Arms." Individual posts and replies are published within topics.

An instance of the Forums portlet must contain at least one category and one topic before users can begin publishing posts. (By default, when you add the Forums portlet to a page, it already has one category, called "General," and one topic, called "Open Discussion.")

Default view versus maximized view

The default view of the Forums portlet shows a list of recent posts, with links to a few other features.
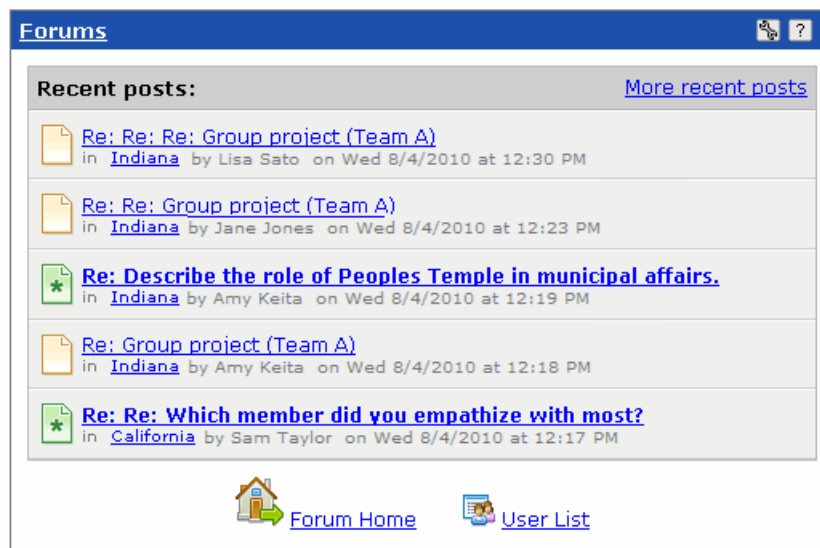
When a user maximizes the portlet, the system displays a larger view, which is the **Forum Home**. In addition to showing recent posts, this view shows a summary of each category, with a list of each category's topics.

The following illustration shows how the Forum Home will look to a student. (The administrative view includes additional options.)
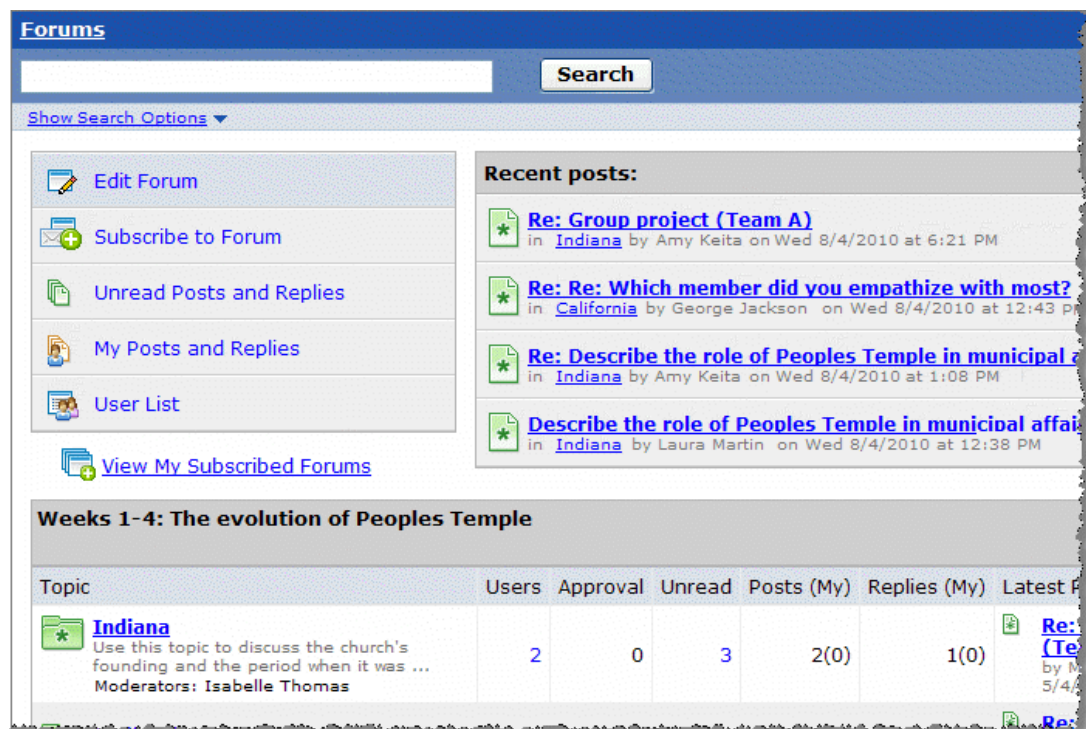
Note also that as the user clicks around to different areas, the view will change.

Icons used in the Forums portlet

The Forums portlet uses the following color scheme to classify posts and replies:

Yellow — indicates that the currently logged-in user has already read the item.

Green with an asterisk — indicates that the currently logged-in user has not yet read the item.

Grey with an eye — indicates that the item is read only.

Colorless with a dashed border — indicates that the item is hidden to all non-administrative users.

(For details of how an item behaves when it is read only or hidden, see "About visible, read-only, and hidden items" on page 425.)

The same color scheme applies to topic icons, though these icons are shaped liked folders.

At the topic level, the classifications work with the following caveats:

- If the currently logged-in user has read *all* of the items in the category, the folder icon is yellow.

- If the topic contains *any* posts or replies that have not been read, the folder icon is green.

- If the topic is inactive and in a read-only state, the eye icon is used. If the topic is active but simply includes one or more posts that are read-only, the eye icon is *not* used — either the green or yellow icon is displayed.

- If the topic is inactive and in a hidden state, the invisible icon is used. If the topic is active but simply includes one or more posts that are hidden, the invisible icon is *not* used — either the green or yellow icon is displayed.

Subscription options

Users who want to subscribe to some posts or parts of a Forum, you have the following options:

- Content options — Users can subscribe to all activity in an instance of the Forums portlet, or to a specific category, topic, or post.

- Delivery options — Users can have posts delivered via e-mail or via the "My Subscribed Forums" view.

When users subscribe with the latter option, the system adds a **View My Subscribed Forums** link within the **Forum Home**. Users who click this link can see a list of all activity in areas to which they are subscribed — regardless of what portlet instance the activity is from. This view includes links to the relevant topic and portlet instance.
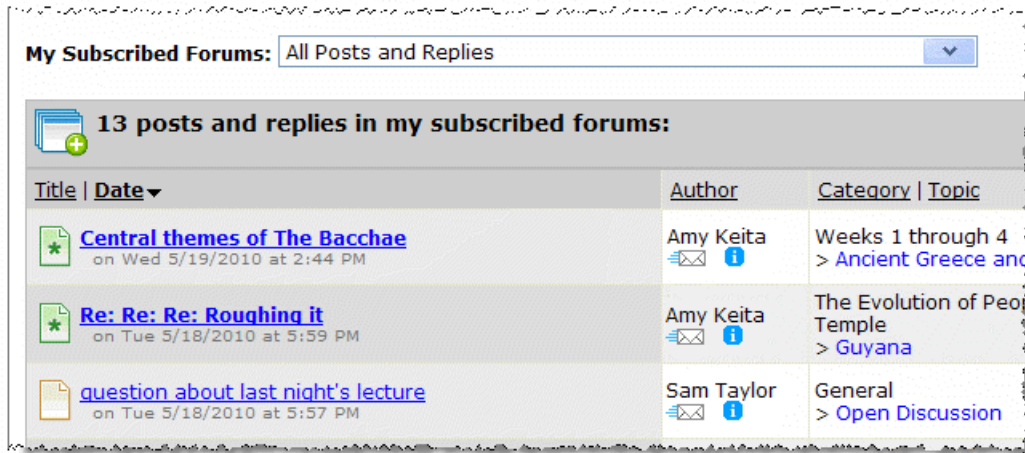
This view includes a drop-down list that lets the user filter to display activity from one portlet instance only.
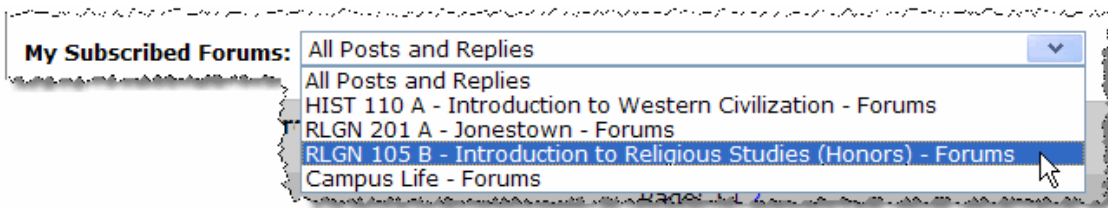
Permissions overview

Within your course context, by default, members of the Students role will have the ability to add posts and reply to posts. However, you may want to add or change the permissions setup.

Most permissions in the Forums portlet are specific to a single instance of the portlet. So a user could have broad permissions in one portlet instance, but in another instance the user might have permission to read posts and nothing more.

Permissions are managed through at a variety of levels and are discussed throughout this chapter. The following list offers an overview.

Viewing the portlet

As with all other portlets, a role's ability to display an instance of the Forums portlet is determined by whether the role is allowed to display the page. (For details on managing page permissions, see

"Letting a role view pages and context links" on page 601.) Put another way, as long as the user can display the page, he or she can display the portlet instance — though the user may or may not have permission to display any categories, topics, or posts.

Users with permission to display the portlet instance also have the ability to subscribe to it (though the subscription will show only those posts and replies that the user is allowed to see, as determined by category and topic permissions, as well as other settings).

Viewing a category

Permission to display a category's heading and its description is determined at the category level, by the category's **Access** setting. You set this when you create or edit the category. (For details on this setting, see "Access" on page 428.)

This same setting allows a role to display the topics contained within the category, though the topic's own settings could be more restrictive than the category setting and hide it from a user's view. Users with permission to display the category also have the ability to subscribe to it (though the subscription will show only those posts that the user is allowed to see, as determined by topic permissions, as well as other settings).

Viewing a topic and its posts

Permission to see a topic's heading, its description and its posts is determined at the topic level, by the topics's **Access** setting. You set this when you create or edit the topic. However, note that if the category's **Access** setting is more restrictive than the topic's, the topic will not be displayed. Note also that some posts could be hidden from general view, and some replies could be hidden from people who have not yet submitted their own replies (for details, see "Editing a user's post or reply" on page 440). For details on a topic's **Access** setting, see "Access" on page 428.

Submitting posts, responses, and modifying them

You give a user permission to submit and edit posts and replies through the wrench settings for the portlet. These include the following:

- **Can Add Posts**
- **Can Edit and Delete Own Posts**
- **Can Reply to Posts**

When you give a role any of these permissions, the role has the corresponding privileges only in those topics that they have permission to display (as determined by the **Access** settings for the topic and category.)

Note that these three permissions are handled discretely, so a role could have permission to do one thing but not the other. (For details, see "Working with the permissions tab" on page 455.)

Acting as a moderator

The ability to act as a moderator — which may include the ability to approve posts prior to their being published and the ability to edit and delete posts within a specific topic — is handled on a topic-by-topic basis. For details, see "Moderation" on page 436.

Administering the portlet instance

You give a role permission to help manage the portlet instance through the wrench settings for the portlet (this is the **Can Administer Portlet** permission). When you give a role this permission, the role has access to the Edit Forum menu, which gives the role most of permissions listed above, as well as others. For details, see "Working with the permissions tab" on page 455. Within a course context, the Faculty role automatically has this permission.

Though this permission is called **Can Administer Portlet**, it does *not* give users access to the wrench-icon menu. If you want to give a role permission to the wrench-icon menu, this can only be done by giving the role the **Can Admin** privilege for the context, which is a much bigger privilege overall (as described in "Letting a role administer a context" on page 603).

About visible, read-only, and hidden items

There are several procedures in this guide that give you the ability to make a topic or post visible, read-only or hidden. If the state of a topic and a post conflict, the more restrictive label applies. Note that whatever setting applies to a post also applies to that post's replies.

These states are defined as follows:

- Visible — The topic or post can be displayed by anyone who is not specifically restricted in some other way. People can take whatever actions they are have permission to take on these posts, including responding, editing, and so forth.

- Read only — The topic or post can be displayed, but posts cannot be responded to. Further, read-only posts cannot be edited or deleted except by moderators for the topic, or by people with the **Can Administer Portlet** operation. People with the **Can Administer Portlet** operation can also move the post while it is in this state.

- Hidden — The topic or post can be displayed and managed only by people with the **Can Administer Portlet** permission. Note that moderators cannot display or work with these items.

Default location

The default layout for course contexts includes an instance of the Forums portlet on the Collaboration page. If desired, you may be able to create additional instances in your course context, in a Campus Groups context that you lead, or in other contexts that you might manage. If you need help with adding a portlet to a page, see "Creating a portlet instance" on page 571.

Working with categories

All instances of the Forums portlet must have at least one category defined (as well as one topic) before discussion can commence.

By default, the Forums portlet instance in your course context contains a category called "General." You can delete or rename this category as appropriate, as well as create new categories.

After you add an instance of the Forums portlet to a page, by default it contain a category called "General." You can delete or rename this category as appropriate, as well as create new categories.

Note that if the intended purpose of your forum is just to cover a few topics that do not have many hierarchal layers, you might want to stick with one category and within it just create a few topics.

To complete the steps described in this section, the user should have the **Can Administer Portlet** permission.

Attributes of a category

When you create a category, you can make choices about any of the following:

- Category name
- Category description
- Topic ordering method
- Pruning
- Access

Category name

The name of the category is essentially its label in the portlet instance, so you should pick a name that is meaningful. For example, if the portlet instance is part of a course, the name might reference a unit of coursework.
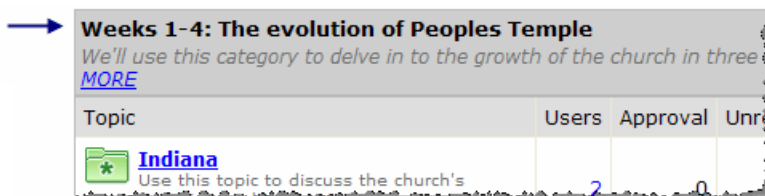
Category description

The category description is an optional field. If you enter a description, it will be displayed under the category name in the Forum Home. If the description is more than a sentence or so, each user will be able to expand or minimize it by clicking links labeled **MORE** and **LESS**.

Topic ordering method

Within each category, you can select a method for ordering topics. You have the following options:

- Alphabetically
- Manually (this is the default choice)
- Newest to Oldest
- Oldest to Newest

With the manual choice, the portlet instance lets you drag and drop topics into different arrangements, as described in .

Pruning

Within each category, you can set a preference for how long posts (and their replies) are displayed before being automatically removed. You make this choice once for the category, and this setting applies to all topics in the category. The choices are to remove posts after any of the following time periods:

- 1 week
- 30 days
- 60 days
- 90 days
- **DO NOT REMOVE** (This is the default choice)

With **DO NOT REMOVE**, posts are never automatically removed, though they can be manually deleted or hidden by an administrator.

Access

The **Access** setting for a category determines whether or not users can display the topics within a category, and the posts within those topics. However, even if this setting allows access, each topic has its own **Access** setting, which may be more restrictive than whatever you choose at the category level.

The default setting is that access is open to all users and all guests (but note that the user first must permission to display your Collaboration page). To restrict access, you click the **Restricted access** radio button, then specify who should be allowed access (if anyone).

The administrative view of the portlet includes icons that indicate what type of access the category has. That is, if all users and guests have access to the category, and if that access is not superseded by restrictions at the topic level, in the administrative view all topics in the category are marked with a globe icon.
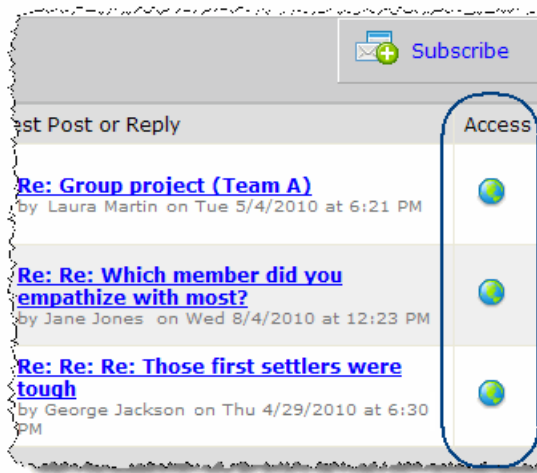
If access to the category is restricted, a red "do not enter" icon is displayed over the globe.
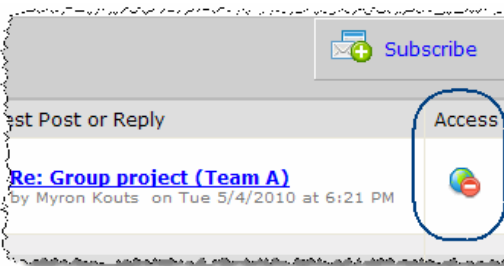
Note that when you allow a role to **Access** a category, they do not necessarily have permission to submit posts. Permission to submit posts is managed separately, by clicking the wrench icon and making choices on the **Permissions** tab.

Further, note that regardless of how access is restricted, the category and its contents are always viewable by any role that has permission to administer the portlet instance. (For details on selecting who can administer the portlet, see "Working with the permissions tab" on page 455.)

Creating a category

Use this procedure to create a category. If you need help with any particular setting, see "Attributes of a category" on page 426.

To create a category:

1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2   Maximize the portlet and click the **Edit Forum** button.
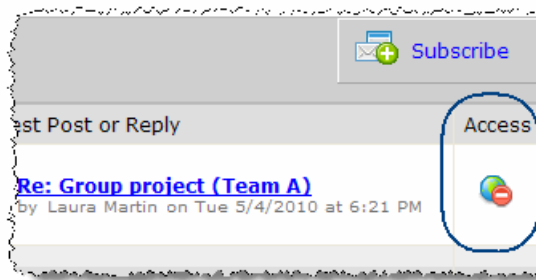
3   Click **Add a Category**.

The system displays the **Adding a Category** screen.

4   In the **Category Name** field, enter a name for the category.

5   If appropriate, enter a description in the **Category Description** field.

6   As appropriate, adjust the settings for any of the following:

   •   **Topic Ordering Method**
   •   **Pruning**
   •   **Access**

7   Click **Save Category**.

Modifying a category

Use this procedure to change any of the following:

•   Category name

•   Category description

•   Topic ordering method

•   Pruning

•   Access

To modify a category:

1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2   Maximize the portlet and click the **Edit Forum** button.

3   Locate the category you want to modify and click the **Edit Category** button.

The system displays the **Edit Category** screen.

4   Adjust any of the fields as appropriate. If you need help understanding any of these fields, see "Attributes of a category" on page 426.

5   Click **Save Category**.

Manually arranging categories

Within any instance of the Forums portlet, you can manually arrange categories.

To manually move a category:

1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2   Maximize the portlet and click the **Edit Forum** button.

3   Locate the category you want to move. Note that, on its right-hand border, the category has an icon made up of an upward and a downward arrow.
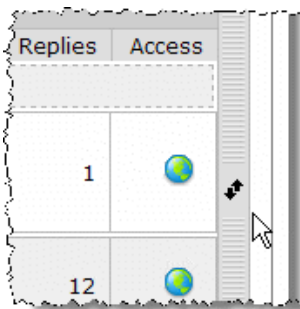
4   Click this icon. Note that the category becomes translucent when you do this. Drag the category to the desired location and release the mouse.

The system automatically saves your change.

Manually arranging topics

If the category has been set up so that you arrange topics manually (this is described in "Topic ordering method" on page 427), then you can manually drag and arrange topics within categories.

You cannot move a topic from one category to another.

To manually move a topic:

1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2   Maximize the portlet and click the **Edit Forum** button.

3   Locate the category whose topics you want to rearrange. Note that each topic, on its left-hand borders, has an icon made up of an upward and a downward arrow.
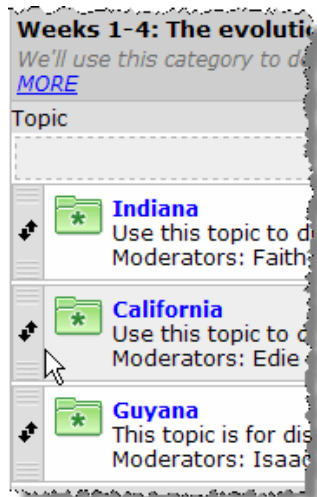
4   Locate the topic you want to move and click this corresponding icon. Note that the topic becomes translucent when you do this. Drag the topic to the desired location and release the mouse.

The system automatically saves the change.

Deleting a category

Note that when you delete a category, you also delete all of its topics, posts, and replies.

If you want to take a less drastic action, you simply restrict access to the category (as described in "Modifying a category" on page 429). You can also choose to delete a single topic or post, or to hide a post.

To delete a category:

1 Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2 Maximize the portlet and click the **Edit Forum** button.

3 Locate the category that you want to delete and click the corresponding **Delete Category** button.
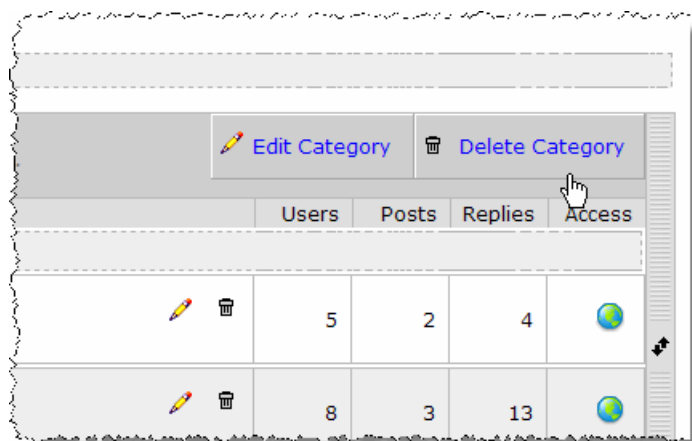
The system displays a dialog asking if you're sure you want to delete the category.

4 Click **OK**.

Working with topics

At least one topic must be defined before discussion can commence.

By default, the Forums portlet instance in your course context contains a topic called "Open Discussion" (within the "General" category). You can delete or rename this topic as appropriate, as well as create new topics.

After you add an instance of the Forums portlet to a page, by default it contains a topic called "Open Discussion" (within the "General" category). You can delete or rename this topic as appropriate, as well as create new topics.

To complete the steps described in this section, the user should have the **Can Administer Portlet** permission.
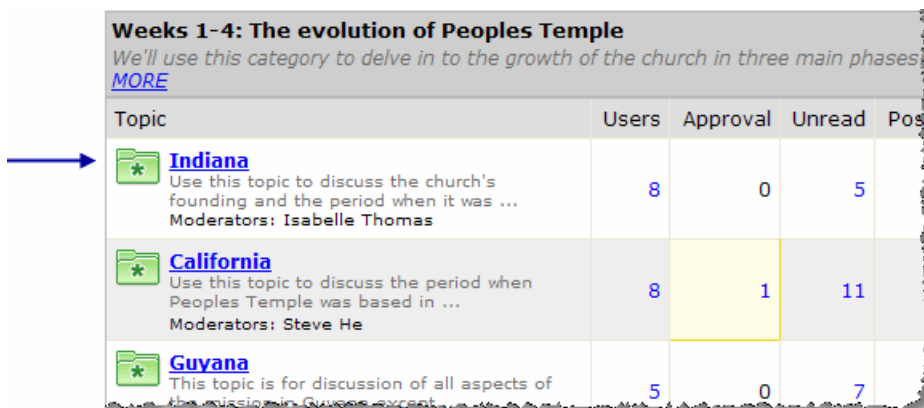
Attributes of a topic

When you create or modify a topic, you can make any of the following choices.

Topic Name

The name of the topic is essentially its label in the portlet instance, so you should pick a name that is meaningful.

The name shows up in the Forum Home.

The name also shows up when the user clicks through to maximize the topic.
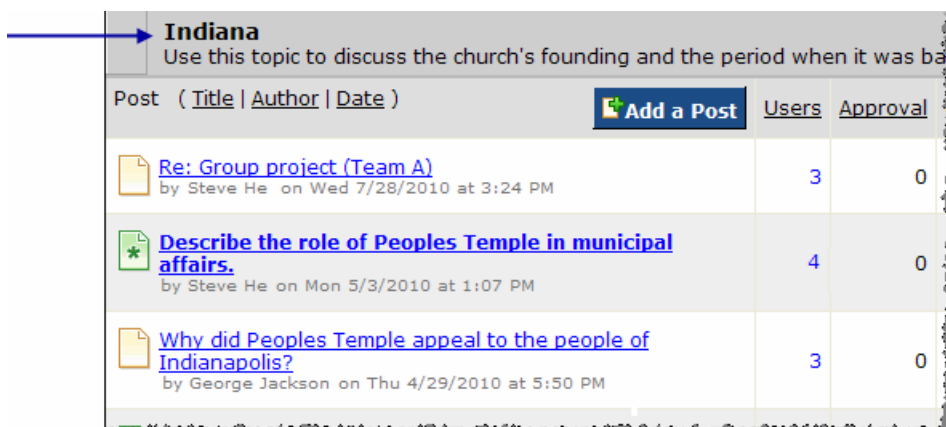
Topic Description

The topic description is an optional field. If you enter a topic description, it will be displayed under the topic name in the Forum Home. If the description is more than a sentence or so, the description is truncated.

When the topic is maximized, the full description shows up.

Activation

When a topic is **active**, users can read it and add posts to it. By default, topics are active immediately and indefinitely. However, you can use the activation field to make the topic active for a specific time period only. For example, you can choose to have the topic launch at a specific time in the future. You can also choose for the topic to become inactive after a certain date.

When the "activation" period ends, or before it begins, you can configure the system to take either of the following actions:

• Hide the topic and its posts (and replies).

• Make the topic and its posts (and replies) read only.

When the activation period ends, you have the additional option of deleting the topic and all its content.

For details on how a post behaves when it has been marked read-only or hidden, see "About visible, read-only, and hidden items" on page 425.

When you change the activation, first you set the dates for when the topic to be active. When you set a specific start time or end time, the system updates the screen to include a drop-down list that lets you specify what happens to the topic when it becomes inactive.

If you choose **Display later manually**, the system adds a drop-down lists that lets you choose whether the item will be read only or hidden until you manually activate it.

Similarly, if you choose **End now**, the system adds a drop-down lists that let you choose whether the item will be read only or hidden.

Note that as an alternative, you can have the system automatically remove the topic's older posts. To do this, you adjust the pruning setting for the category, as described in "Pruning" on page 427.

Access

The **Access** setting for a topic determines whether or not users can display the topic and its posts. By default, topics are accessible to all users and guests. To restrict access, you click the **Restricted access** radio button, then specify who should be allowed access.

Note that the category access might be more restrictive than the topic access. If so, it won't matter how you configure the topic access — the category settings will apply. (For details see "Access" on page 428.)

In the administrative view, all unrestricted topics in the category are marked with a globe icon. If access to the category is restricted, a red "do not enter" icon is displayed over the globe.

Note that the **Access** setting does not have any effect on whether or not users can submit posts. The ability to submit posts is managed separately, by clicking the wrench icon and making choices on the **Permissions** tab.

Further, note that regardless of how access is restricted, the category and its contents are always viewable by any role that has permission to administer the portlet instance. (For details on selecting who can administer the portlet, see "Working with the permissions tab" on page 455.)

Private Topic

If you want a topic to be used solely for private communication between individual users and administrative privileges, you can make it a private topic. When you do this, users who display the topic see only their own posts and any responses from administrators. With this setup, the topic functions like an e-mail system between an individual user and the administrators of the portlet instance.

To make a topic private, you select the **Private Topic** checkbox. Note that if you select this checkbox, the screen updates to hide the moderation options, since moderation is not relevant to private topics.
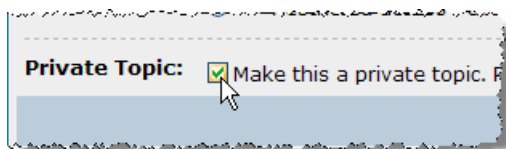
Moderation

If appropriate, you can appoint moderators and enable one of the following types of moderation:

- You can give the moderator (or group of moderators) permission to edit and delete users' posts.

- You can require that all posts be approved by a moderator before they are displayed. With this level, the moderator can still edit or delete users' posts.

If you choose to require that all posts be approved before being displayed, note the following:

- If a post is approved and the author later edits the post, the post is removed from the portlet until it is approved once again.

- Members of the Administrators role and people with the **Can Administer Portlet** permission are allowed to approve posts even if not specifically named as moderators.

- For those people who have the ability to approve posts, their own posts automatically display as soon as they click **Submit** (that is, no approval is required).

By default, topics do not use moderation.

If you select one of the two levels of moderation, the system expands the screen to include a form that lets you choose moderators. If you are setting up a Forums portlet instance within your course context, note that you are automatically considered a moderator.

Creating a topic

Use this procedure to create a topic. If you need help with any particular setting, see "Attributes of a topic" on page 433.

To create a topic:

1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2   Maximize the portlet and click the **Edit Forum** button.

3   Locate the category to which you want to add a topic. In that area, click **Add a Topic**.

The system displays the **Adding a Topic** screen.

4 In the **Topic Name** field, enter a name for the category.

5 If appropriate, enter a description in the **Topic Description** field.

6 As appropriate, adjust settings for any of the following:

- Access
- Private Topic
- Moderation

7 Click **Save**.

Modifying a topic

Use this procedure to change any of the following:

- Topic Name
- Topic Description
- Activation
- Access
- Private Topic
- Moderation

To modify a topic:

1 Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2 Maximize the portlet and click the **Edit Forum** button.

3 Locate the topic you want to modify and click corresponding pencil icon.
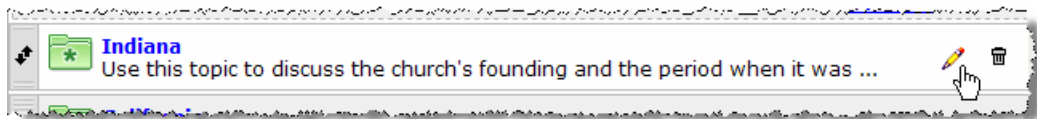
The system displays the **Edit Topic** screen.

4 Adjust any of the fields as appropriate. If you need help understanding any of the fields, see "Attributes of a category" on page 426.

5 Click **Save**.

Deleting a topic

Note that when you delete a topic, you also delete all of its posts and replies.

If you want to take a less drastic action, you can simply restrict access to the topic (as described in "Access" on page 435). You can also choose to delete a single post, or to hide a post.

To delete a topic:

1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2   Maximize the portlet and click the **Edit Forum** button.

3   Locate the topic that you want to delete and click the corresponding trash-barrel icon.
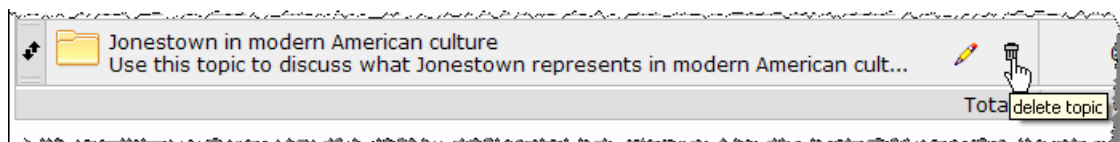
The system displays a dialog asking if you're sure you want to delete the topic.

4   Click **OK**.

Working with posts

In a portlet instance where you have administrative privileges — such as Forums portlet instance in your course context — you can take any of the following actions with posts:

A member of the Administrators role, or anyone with the **Can Administer Portlet** permission, can take any of the following actions with posts:

- Edit any post or reply.

- Delete any post or reply.

- Move a post, and all of its replies, to another topic within the portlet instance.

- Make a post, and all of its replies, read only or hidden.

Note that a moderator can also edit and delete posts and replies, but can not take the other actions mentioned.

Note that users with the **Can Administer Portlet** permission can do any of the above as well. A moderator also has the ability to edit and delete posts and replies.

If you are looking for details on adding a private comment to a post or a reply, see "Working with private comments" on page 451.

For details on approving a post, see "Working with an approval queue" on page 446.

Editing a user's post or reply

If a forum participant has submitted a post that you need modify for any reason, use the steps below. For any post or reply, you can modify the items listed under "Content," below. If you are working with an original post (not a reply) and you have the Can Administer Portlet permission, you can also edit the items listed under "Options."

Content

The primary category of changes are considered "content" changes. Anyone with permission to edit the post or reply can work with content, which means doing any of the following:

- Changing the item's subject line.

- Changing the text of the post or reply.

- Working with images that have been uploaded and upload additional images.

- Working with files that have been attached and upload additional files.

- Making the post anonymous (if anonymous posting is enabled, and if the post is not already anonymous). Once a post is made anonymous, that change cannot be reversed except by the author.

- Changing whether or not the user's photo is displayed. This change is possible only if the post is not anonymous.

Options

When you are editing an original post (not a reply), the systems displays an **Options** tab, which allows you to do any of the following:

If the person editing the post has administrative privileges (as opposed to just being an author or a moderator), the systems displays an **Options** tab, which allows the user to make any of the following changes:

- Set the post to display later, and make it either read only or hidden until then. The default setting is that posts are displayed immediately.

- Set an end date for the post. After the post's end date, you can make it read-only or hidden, or you can have the system delete it. The default setting is that posts are displayed indefinitely.

- Specify that an individual who wants to reply to the post can do either of the following:

  - Reply as many times as they like.
  - Reply only once. In this case, if the user has replied and then displays the post again, the system hides the **Reply** button, both on the original post and on all the replies, unless the user has the **Can Administer Portlet** permission.

  The default setting is that users can reply as many times as they like.

- Specify that after a user submits a reply, the reply is displayed:

  - Immediately (this is the default).
  - Only after each user has responded.
  - After a specified time.

The **Options** tab also contains a link that lets you edit the topic, which might be necessary if you want to change the moderation settings for the topic.

For details on how a post behaves when has been marked read only or hidden, see "About visible, read-only, and hidden items" on page 425.

Making your edits

Use this procedure to edit a post or reply. For help understanding the available choices, see "Content" and "Options" on page 440.

To edit a user's post or reply:

1 Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2 Locate the post or reply you want to edit.

3   Click the **Edit** icon.
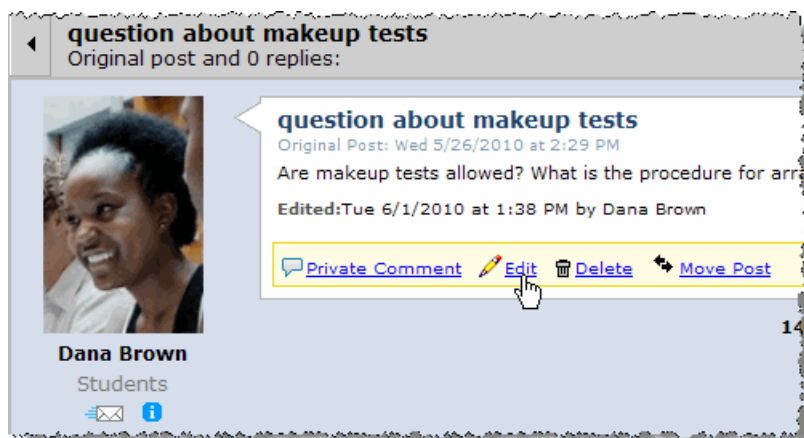
The system makes the post modifiable.

If this is an original post, and if you have the **Can Administer Portlet** permission, the system displays two tabs at the top of the post, with the **Content** tab displayed by default.
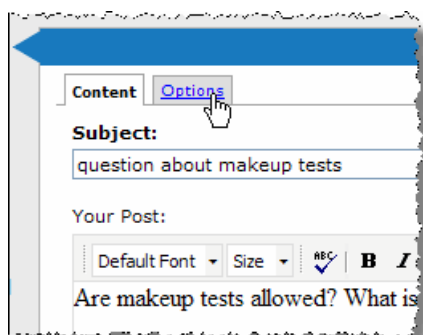
In this case, do one of the following:

- If the change you want to make is on the **Content** tab, go ahead and make your change.
- Click the **Options** tab to display it. Make any changes that are appropriate.

4   When you have made all of the changes you want to make, click **Preview** to preview the post (if desired).

5   Click **Submit** to save your changes.

The system saves your changes and adds a note stating that you edited the item.
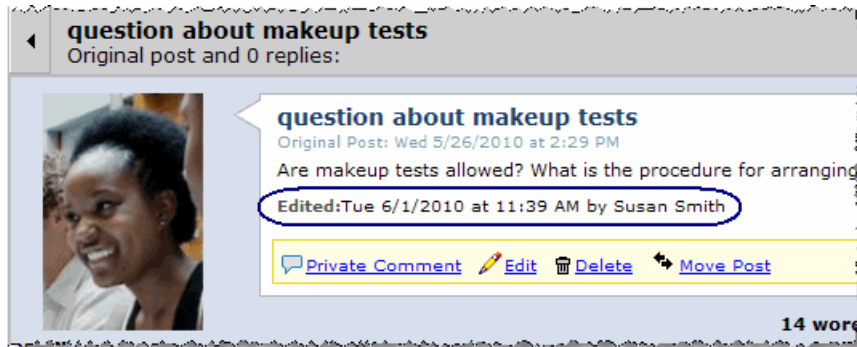
Deleting a post or reply

If a user has published a post or reply that you want to delete, use this procedure. Note that when you delete an original post, you also delete all of its replies.

When deleting a reply, you also delete replies to that reply.

To delete a post or reply:

1 Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2 Locate the post or reply you want to delete.

3 Click the **Delete** icon.

The system displays a dialog asking if you are sure you want to delete the post.

4 Click **OK**.

The system removes the post.

Another way to delete a post and all of its replies is to change the display setting of the original post, as described in "Adjusting a post's display setting" on page 445.

Moving a post and its replies

If appropriate, you can move a post and its replies to a different category or topic within the same portlet instance.

To move a post and its replies:

1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2   Display the post that you want to move.

3   Click the **Move Post** icon. If you don't see a Move Post icon, then you are probably looking at a reply. (You can perform the move action only on an original post. All replies to the post will also be moved.)
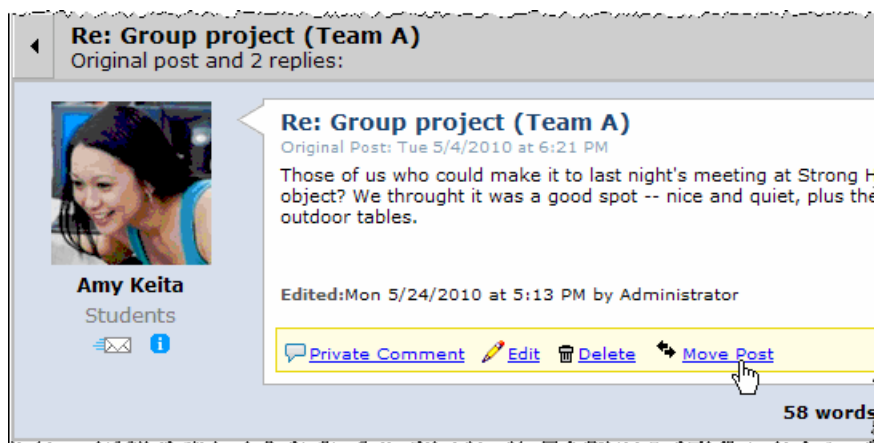
The system displays a dialog box that lets you select a destination. In this list, categories are listed alphabetically. Topics that are read-only or hidden are flagged as such.
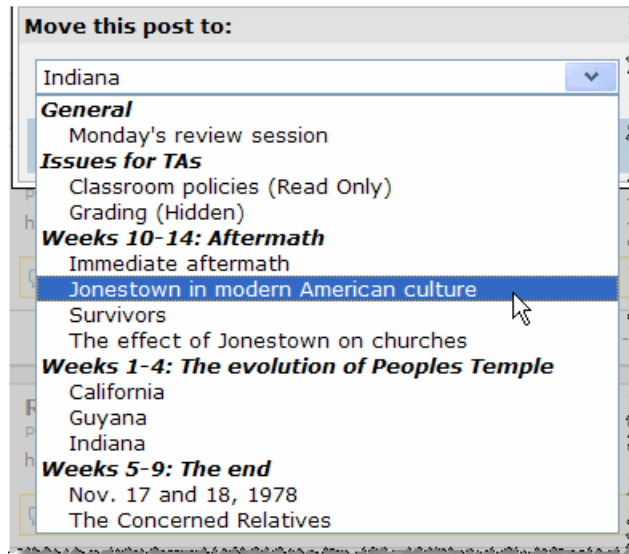
4   Make a selection and then click **OK**.

The system moves the post and its replies.

Adjusting a post's display setting

A post's display status determines whether an item is visible, read only, or hidden. (For details on how a post behaves when has been marked read only or hidden, see "About visible, read-only, and hidden items" on page 425.)

By default, all posts are visible. The post's display setting is displayed at the lower right of the post's text.
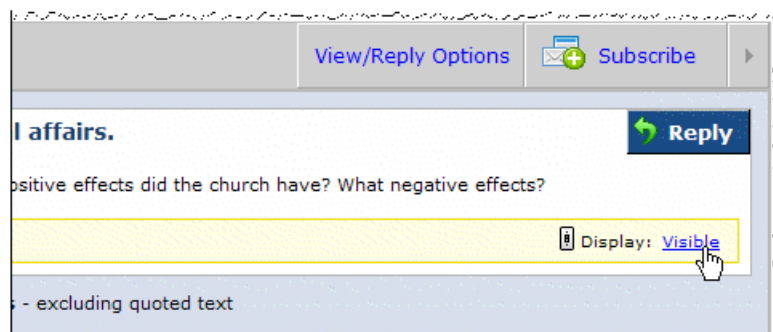
Note, however, that even if the status says **Visible**, if the *topic* has been marked as read-only or hidden, then the post's display status is superseded by the more-restrictive topic setting. So if you

think that a post is supposed to be visible and users report that they cannot see it, you may want to check the topic settings.

Another way of changing a post's display status is to open the post for editing and use the Options tab. With this method, you can also choose an end date for the post. For details, see "Editing a user's post or reply" on page 440.

To change a post's display setting:

1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2   Display the post that you want to work with.

Click the **Visible** link, which is at the bottom right of the post. If this link is not displayed, you are probably looking at a reply, not an original post. You can perform this action only on an original post, though the action will also affect all replies to the post.

When you click the **Visible** link, the system displays a dialog box that lets you select an action.

3   Make a selection and click **OK**.

The system takes the appropriate action.

Working with an approval queue

This section explains how to work with posts and replies in a topic where approval is required.

If you need help setting up a topic so that approval *is* required, see "Moderation" on page 436.

Indicators for end users

When a user displays a topic where approval is required, a dialog stating as much is displayed at the top of the screen.
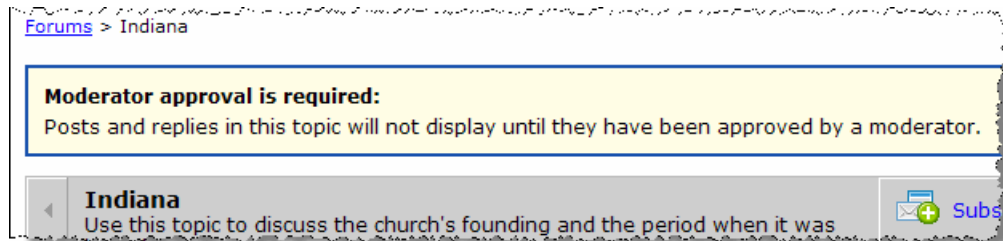
If the user submits a post or reply, the system updates this dialog to include the number of posts the logged-in user currently has pending approval.
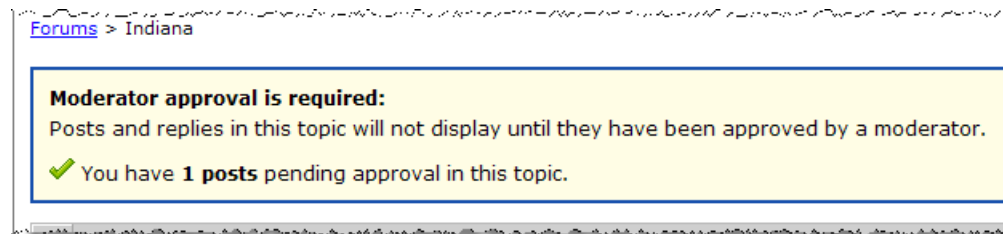
Indicators for moderators and administrators

When you display an instance of the Forums portlet in which there are posts awaiting approval, you will see several indicators if there are posts awaiting approval. These include the following:

When they open the Forums portlet, administrators and moderators will see several indicators if there are posts awaiting approval. These include the following:

- Yellow highlighting on any post that is awaiting approval.

- In the **Approval** column in any category summary, a tally of the items awaiting approval in each topic.

- An "approval queue" button. Clicking this button displays a list of all items that are awaiting approval.

The approval queue is listed in the Forum Home, right below the User List. Note that the queue is displayed only if there are posts and replies awaiting approval.
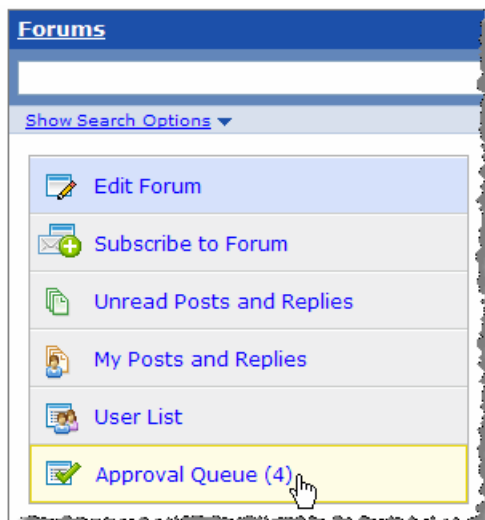
Similarly, if any of the items in need of approval are in the **Recent posts** list, they are highlighted in yellow.
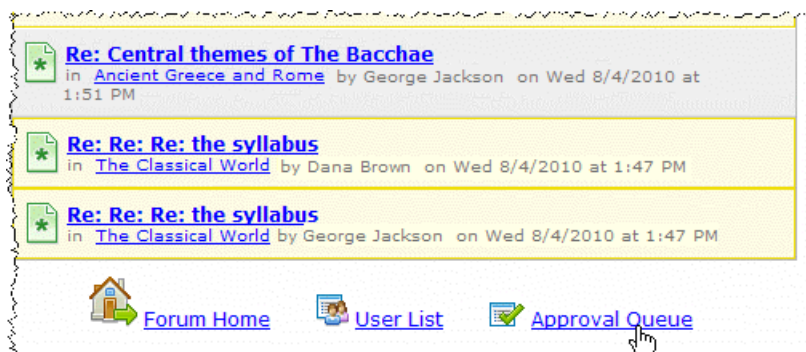
In the Forum Home, if there are items listed in the **Approval** column, these too are highlighted in yellow.

If you display a list of posts — such as the list of unread posts or the list of all posts in a topic — items that require approval are flagged.

When you display one of these posts, the background is yellow, rather than the standard blue or white, and the system displays a link that allows you to approve the item.

Processing a post or reply that requires approval

If a topic's moderation setting requires posts to be approved before they are published, you or a designated moderator must review each post that is submitted. For each post, you do one of the following:

- Approve it.
- Edit it and post it.
- Delete it.

People allowed to take these steps include moderators and people with the Can Administer Portlet permission.

To process a post or reply that requires approval:

1 Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2 Locate the post or reply that requires approval.

3 Review the post and do one of the following:

- Click the **Approve** icon. Doing this makes the post active in the portlet.
- Click the **Edit** link, make any necessary modifications, then click the **Submit** link. Doing this makes the post active in the portlet.
- Click the **Delete** link. Doing this discards the post.

Working with private comments

If appropriate, you can add a private comment to a post or a reply. This message will be viewable only by its author, and by other people who have the **Can Administer Portlet** permission.

You can also edit or delete private comments that you or another administrator previously made.

Adding a private comment

To add a private comment, use the following procedure.

To add a private comment:

1 Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2 Navigate to the post or reply that you want to comment on.

3 Click the link labeled **Private Comment**.
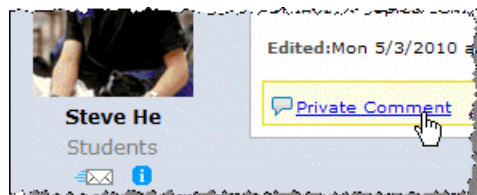
The system displays a field labeled **Adding a Comment**.

4 Enter your remarks.

5 Click **Save Comment**.

The system adds the message to the screen, for those people allowed to see it (the author and administrators). The message is displayed immediately below the post, along with your name.

Note that if someone else with administrative privileges were to edit your comment, the attribution would change to that person's name.

Editing a private comment

If you or another administrator has added a private comment, you may edit that comment as appropriate.

To edit a private comment:

1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2   Navigate to the appropriate post or reply.

3   In the area over the comment, click the pencil icon.
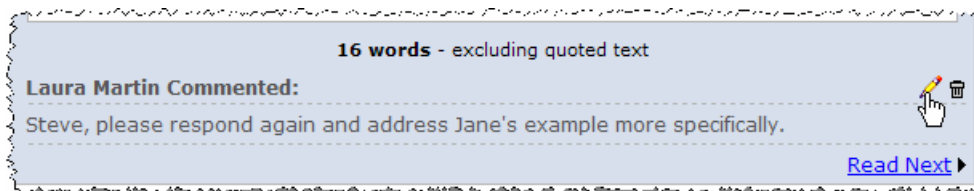
4   The system display a field labeled **Editing Comment**.

Make any changes appropriate and click **Save Comment**.

5   The system saves your changes. Note that if you were not the original author of the comment, the attribution changes to reflect your name.

Deleting a private comment

If you or another administrator has added a private comment, you may edit that comment as appropriate.

To delete a private comment:

1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2   Navigate to the appropriate post or reply.

In the area over the comment, click the trash-barrel icon.

3   The system displays a dialog asking if you are sure you want to delete the comment.

4   Click **OK**.

Reviewing activity by user

Each instance of the Forums portlet lets you display a list of all people who have participated in conversations in that instance, with details about their activity. If the portlet instance is part of a course context, the system offers greater detail into this activity.

Any user can display this list, but the list contains more options if the user has the **Can Administer Portlet** permission. These options are described in "Navigating to the user list," below.

Navigating to the user list

The **User List** names each person who has submitted a post or a reply in the portlet instance. This view also show the total number of posts and replies that each person has submitted.

This list is available to every user, but the hyperlinked numbers are displayed only in the administrative view. Clicking one of these numbers displays the appropriate list of posts for that user. From this more-specific list, you can click through to view any of the posts or any of the

parent topics. If this portlet instance is located within a course context, you can also click the name of the author to display a user participation screen for that person.

Displaying a user participation screen

If an instance of the Forums portlet is located within a course context, the administrator/teacher can display a "user participation" screen, which offers more detail than you can get from the User List. Specifically, the user participation screen includes the following:

- A breakdown of how many posts and replies that the user submitted for each category and topic in the portlet instance.

- The total number of posts that the user has viewed, both for the entire portlet instance and by category and topic. Further, you can expand each topic to show a list of all that topic's posts, with an indicator of exactly which posts the user has viewed. (If the user has viewed the post, the system displays a checkmark. If the user has not viewed the post, the system displays an X.)

Weeks 1 through 4		Posts Written	Replies Written	Posts Viewed
⊟ The Classical World		2	1	3
» the poetry of the Spartans		0	0	✗
» question on Philo		0	0	✓
» more thoughts on Gilgamesh		0	0	✗
» Hesiod		0	0	✓
» clarification regarding last night's review		0	0	✗
» Philo's rule		1	0	✓
» the Homeridae		1	0	✗
⊞ Ancient Greece and Rome		0	0	1
⊞ Late Antiquity		0	0	1
Totals:		2	1	8

Working with the permissions tab

As described in "Permissions overview" on page 423, there are several places within the Forums portlet where you make choices that affect a role's permissions. This procedure deals with how to make choices on the **Permissions** tab.

About the permissions

The **Permissions** tab lets you give a role any of the following permissions, in any instance of the Forums portlet.

If your site has an additional permission listed — **Can Manage Categories and Topics** — note that we do not recommend using this permission. If you need to give a role permission to manage categories and topics, we recommend giving that person the **Can Administer Portlet** permission.

Can Add Posts

Lets members of a role submit posts in any topic that they have permission to view.

Can Administer Portlet

Gives members of a role full administrative rights in the portlet instance. That is, this permission automatically gives the role all abilities associated with the other permission levels in this list, as well as the ability to display and modify all categories and topics in the portlet instance and to complete any task described in this chapter.

Though this permission is called **Can Administer Portlet**, it does not give users access to the wrench-icon menu. If you want to give a role permission to the wrench-icon menu, this can only be done by giving the role the **Can Admin** privilege for the context, which is a much bigger privilege overall (as described in "Letting a role administer a context" on page 603).

Can Edit and Delete Own Messages

Lets members of a role edit and delete their own messages. In order for this permission to be meaningful, you also have to give the role either the **Can Add Posts** permission or the **Can Reply to Posts** permission).

Can Manage Categories and Topics

Lets members of a role do both of the following:

- Create categories and topics.
- Edit or delete any category or topic that the role has permission to display.

Can Reply to Posts

Lets members of a role respond to posts, in any topic that they have permission to view.

Giving a role a permission

Use this procedure to give a role any of the permissions listed in .

To give a role an instance-level permission:
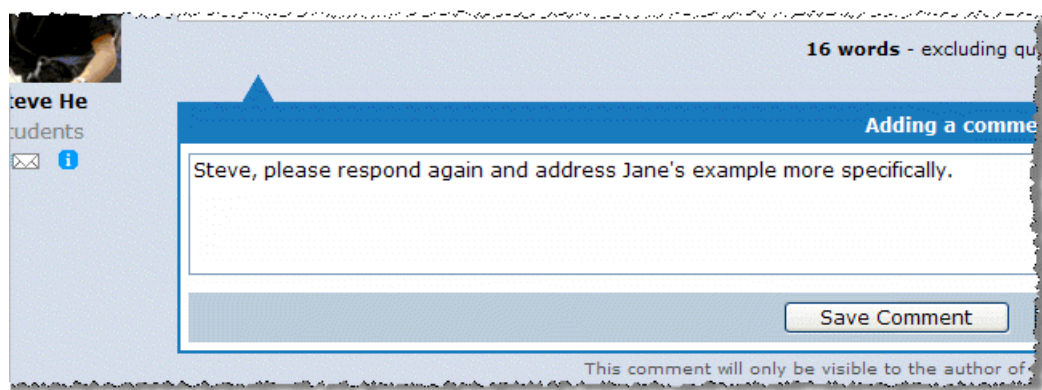
1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

The system displays the **Customize Portlet** *Forums* screen, with the **Preferences** tab selected.

2   Click the **Permissions** tab.

The system displays the **Permissions** screen.

3   Locate a role whose permissions you want to manage. Select the corresponding checkbox(es).

4   Click **Save**.

Other administrative tasks

This section covers other administrative details and tasks that might be of interest.

Allowing or disallowing anonymous posts

For each instance of the Forums portlet, you must decide whether anonymous posts will be allowed. By default, anonymous postings are not allowed.

To allow or disallow anonymous posts:

1   Log in to the portal as a member of the Administrators role or someone with **Can Administer Portlet** privileges in the appropriate portlet instance. Navigate to the appropriate portlet instance.

2   Maximize the portlet and click the **Edit Forum** button.
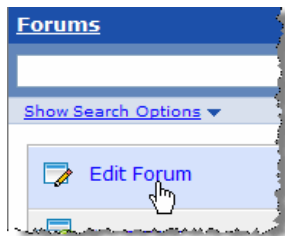
The system displays the **Edit Forum** page. At the top of the page is a field labeled **Allow Anonymous Posting**, which includes a checkbox that allows users to post messages anonymously.
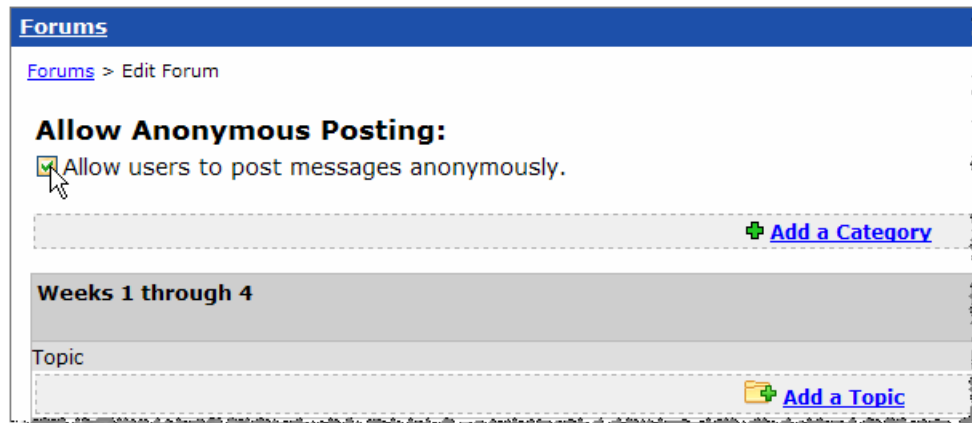
3   Select or de-select the checkbox as appropriate. The system automatically saves your selection as soon as you make it.

Configuring the file upload feature

By default, the system has a 2MB maximum for attachments and images that are attached to each post or reply. However, you can change this if appropriate. This configuration choice affects all instances of the Forums portlet.

Note that if you change the maximum to zero, the system removes the file upload and image attachment features from the screen where users create posts and replies.

To configure maximum file uploads:

1   Log in to the portal as a member of the Administrators role or someone with **Can Admin** privileges in the appropriate context. Navigate to the appropriate portlet instance.

2   Click the **Site Manager** link.

    The system displays the **Site Manager** screen, with the **Site Settings** tab selected by default.

3   Locate the **Advanced site settings** label and click the corresponding **Edit** link.

    The system displays a screen with a few tabs, with the **General** tab selected by default.

4   Locate the **Forum Portlet, Individual Post/Reply files and images** label. Use the corresponding text box to specify the maximum size, in megabytes, for attachments for each post.

5   Click **Save**.

Configuring the search feature

By default, the Search field in the Forums portlet is set up to ignore certain words, including the following:

- and

- or

- the

- in

- of

- where

- how

- is

- why

- when

- by

If desired, you can change this list. You do this by modifying the `FWK_Globalization` table. Locate the entry with the `Text_Key` of `TXT_SEARCH_IGNORE_LIST`. This entry includes a `Text_Value` field that lists all the keywords the system will ignore. Feel free to add or remove words as appropriate.

Database reference

The following tables in the main JICS database store information specific to the Forums portlet:

- `ICS_ForumCategory`

- `ICS_ForumMessage`

- `ICS_ForumMessageFile`

- `ICS_ForumMessageImage`

- `ICS_ForumSubscription`

- `ICS_ForumThread`

- `ICS_ForumTopic`

- `ICS_ForumUser`

- `ICS_ForumViewer`

If you see duplicate versions of some of these tables that end in "`72`" — for example `ICS_ForumCategory_72` — these were used by version 7.2 of JICS, and they remain in your database for historical reasons. However, when you installed 7.3.x (or to 7.5.x), all of the data from these tables was transferred to the tables referenced above.

Troubleshooting

This section is intended to help you diagnose configuration errors.

The 'Add a Post' or 'Reply' button does not show up

If users report that the **Add a Post** or **Reply** button does not show up for a post, there may be a few reasons why:

- The user might not have permission to publish posts or replies. To check this, click the wrench icon and navigate to the **Permissions** tab. For the person to have permission to see the **Add a Post** button, that person's role should have the **Can Add Posts** permission. For the person to have permission to see the **Reply** button, that person's role should have the **Can Reply to Posts** permission. (For more details, see "Troubleshooting" on page 459.)

- The post, or the topic that contains the post, might be read-only. To check to see whether the topic is read only, check the topic's **Activation** setting (for help with this, see "Modifying a topic" on page 438). To check the setup of the post itself, look at its display setting, which is viewable at the bottom right of the post's text. (For help with this, see "Adjusting a post's display setting" on page 445.)

If the **Reply** button specifically is not showing up, there are a few additional possible reasons:

- The post might be set up so that users can respond only once. If this is the case, once the user has responded, the system will remove the **Reply** button from that user's view. To check this, open the post for editing and display the **Options** tab. This tab contains an area labeled **This post is:**, which will reveal whether users are restricted to only one response. (For more details, see "Editing a user's post or reply" on page 440.)

- If the user is a moderator or an administrator, he or she could be looking at a post that still requires approval. (You can tell an item is awaiting approval if it has a yellow background and if an **Approval** link is displayed.) As long as an item is awaiting approval, no one can reply to it. For more details, see "Working with an approval queue" on page 446.

Users cannot display a post or reply

If users cannot display a particular post or reply, and if you think they ought to be able to, there may be a few reasons why:

- The item, or the topic that contains the item, might be hidden. To check to see whether the topic is hidden, check the topic's **Activation** setting (for help with this, see "Modifying a topic" on page 438). To check the post, look at the display setting, which is viewable at the bottom right of the post's text. (For help with this, see "Adjusting a post's display setting" on page 445.)

- The item might be part of a category or a topic that the user is not authorized to display. To check this, check the **Access** settings for the category and topic. (For help with this, see "Working with categories" on page 426 and "Working with topics" on page 433.)

- If the item is a reply, the original post might have been set up such that replies are not displayed until after a certain date, or until after the person looking at the post has submitted his or her own reply. To check this, open the post for editing and display the **Options** tab. This tab

contains an area labeled **Replies:**, which will detail when replies are available. (For more details, see "Editing a user's post or reply" on page 440.)

- The post might be hidden. To check the post, look at the display setting, which is viewable at the bottom right of the post's text. (For help with this, see "Adjusting a post's display setting" on page 445.)

- The topic that contains the item might be hidden. To check this, look at the topic's **Activation** setting (for help with this, see "Modifying a topic" on page 438).

- The item could be awaiting approval from a moderator. Check to see whether the topic that contains the item requires approval. (For help with this, see "Working with an approval queue" on page 446.)

Users cannot upload files and images

If users cannot upload files and images when creating posts, this might be because the feature has been deactivated for the entire portal. For details, see "Configuring the file upload feature" on page 457. To find out, speak with your portal administrator.

The Approval Queue is not displayed

If the Approval Queue is not displayed for a particular user, there could be a few reasons why:

- There are no items currently awaiting approval. If no items need to be approved, the Approval Queue is not displayed.

- Moderation is not in effect for any topics in the portlet instance. To check this, open each topic for editing and review the Moderation area of the screen. (For help with this, see "Working with topics" on page 433.)

- The user who cannot display the Approval Queue is not a moderator or an administrator. To check to see whether the person is moderator, open the topic for editing and review the moderation area of the screen.

Handouts

This chapter describes the Handouts portlet, which is the tool you use to post files that you want students to download.

In this chapter:

Key concepts

This section offers an overview of the Handouts portlet, which lets authorized users post documents for members of a class, or for the portal community at large. In each instance of the Handouts portlet, you define **sets**, which are like topics. Handouts are posted within sets.

Default locations

If your school uses the default layout for course contexts, your course context includes two instances of the Handouts portlet:

- One called "Handouts," on the main page of the course context.

- One called "Downloadable Version," which is on the Syllabus page and intended to host a downloadable version of your syllabus.

Further, if you manage a Campus Group, the context for your group is created with a Handouts portlet instance on its default page.

If desired, you may be able to create additional instances. If you need help with adding a portlet to a page, see .

Portlet basics

The section describes a few features of the portlet that your students — and you — will use when navigating the portlet and downloading handouts.

Default view versus maximized view

The main page of the portlet displays the name and description of each set, along with each set's handouts. In this view, the listing for each handout includes the file type and file size.

If you maximize the portlet, you can expand (**Show**) or collapse (**Hide**) the list of handouts associated with each set. In this view, the listing for each handout shows the number of times the handout has been downloaded.

Opening or downloading a handout

If you want to open or download a handout, use this procedure.

To open or download a handout:

1 Navigate to the appropriate portlet instance and right-click on the handout you want.

2 Do one of the following:

• To open the handout in your browser, click on it.

• To save the handout locally, right-click on the item and choose **Save Target**, **Save Link**, or a similarly worded choice. The exact choices will vary depending on which browser you are using.

Downloading file tools

If you need to view a handout that was created using a tool you don't have on your computer, you might be able to find what you need using the **File Tools** menu option. This menu option provides default links to the following software downloads:

• Adobe Reader

• Excel Viewer

• PowerPoint Viewer for Mac

• PowerPoint Viewer for PC

• Quick Time

• Real Player

• Windows Media Player

• WinZip

• Word Viewer

To download file tools:

1   Navigate to the appropriate portlet instance and maximize it.

2   Click **File Tools**.

The system opens a new browser tab that lists the software tools available for download.

3   In the left-hand column, click the tool that corresponds with the tool you want to download.

The system opens a new browser tab.

4   Follow the instructions on the page to download the tool.

Setting preferences

While using the Handouts portlet, you can adjust your own personal view of the portlet using any of the following procedures:

- Ordering handouts alphabetically
- Ordering sets alphabetically
- Displaying empty sets

Note that students and any other users of the portlet can also adjust their view using these procedures. For this reason, bear in mind that whenever you create a specific order for either handouts or sets, students will not necessarily see that sequence.

Ordering handouts alphabetically

If appropriate, you can have the system display handouts alphabetically within each set.

When handouts are ordered alphabetically, the system ignores any sequence that may have been specified when you (or another authorized user) configured each set, as described in "Working with sets" on page 466.

To order handouts alphabetically:

1   Navigate to the appropriate portlet instance and click the wrench icon.

2   Click the **Preferences** tab.

3   Select the checkbox labeled **Order Handouts Alphabetically**.

4   Click **Save**.

5   Click **Exit**.

The system now orders all handouts alphabetically within (within your personal view).

Ordering sets alphabetically

If appropriate, you can have the system display sets alphabetically within the portlet instance.

When sets are ordered alphabetically, the system ignores any sequence that you (or another authorized user) might have previously specified, as described in .

To order sets alphabetically:

1   Navigate to the appropriate portlet instance and click the wrench icon.

2   Click the **Preferences** tab.

3   Select the **Order Sets Alphabetically** check box.

4   Click **Save**.

5   Click **Exit**.

 The system now orders all set alphabetically (within your personal view).

Displaying empty sets

By default, the system does not display sets that contain no handouts. However, you can choose to display them in your view of the portlet.

From the Handouts portlet:

1   Navigate to the appropriate portlet instance and click the wrench icon.

2   Click the **Preferences** tab.

3   Select the **Show Empty Sets** check box to display sets for which no handouts are available. If this preference is not selected, the default Ungrouped set does not display.

4   Click **Save**.

5   Click **Exit**.

 The system now orders all sets alphabetically (within your personal view).

Working with sets

Sets are like categories into which you can group similar handouts. By default, each instance of the Handouts portlet has one set called **Ungrouped**. By default, a new handout will be placed into this set, but you can create and populate additional sets.

Note that by default the system will not display an empty set unless the user chooses to manually display it. So if you add a set and don't see it, you probably have your preferences set to hide empty sets. To display empty sets, follow the steps described in "Displaying empty sets" on page 465.

Adding a set

You can add as many sets as is appropriate for your course. Note that a set is used only by the instance where you create it. If you have multiple instances of the Handouts portlet, you create different sets for each one.

To add a set:

1   Navigate to the appropriate portlet instance and maximize it.

2   Click the **Add a Set** link, which is in the lower right area of the screen.

    The system displays the **Handouts - Manage Set View** screen.

3   In the **Name** field, enter a name for the set.

4   If appropriate, enter text in the **Description** field. The description can be no more than 2,000 characters. This text will be displayed in main portlet view both when the portlet is maximized and when it is not.

5   Use the **Position** drop-down list to specify where the set should be placed in relation to other sets. However, note that the choice you make at this juncture will not be seen by students who choose to display sets in alphabetical order, as described in "Ordering sets alphabetically" on page 464.

6   Do one of the following:

•   To finish, click **Save**.

•   To save and start creating another set, click **Save and Add Another**.

Modifying a set

At any time after you create a set, you can do any of the following:

•   Change its name.

•   Change its description.

•   Change the position of set relative to other sets. (However, this change will not be seen by students who choose to display sets in alphabetical order, as described in "Ordering sets alphabetically" on page 464.)

- Re-order the handouts within the set. (However, this change will not be seen by students who choose to display sets in alphabetical order, as described in "Ordering sets alphabetically" on page 464.)

- Delete a handout.

- Move or copy a handout to a different set.

To modify a set:

1   Navigate to the appropriate portlet instance and maximize it.

2   Locate the set that you want to modify and click the corresponding Edit icon, which looks like a folder with a pencil on it.
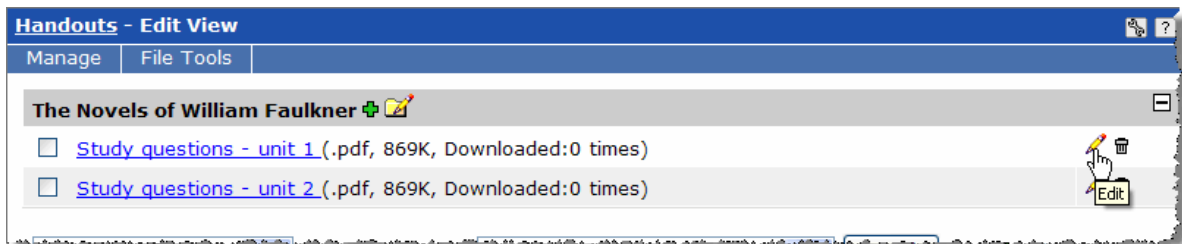
The system displays the **Handouts - Manage Set View** screen.

3   Do any of the following, as appropriate.

- Modify the text in the **Name** and **Description** fields.

- Change the value in the **Position** drop-down list. This will change the position of the set relative to other sets, for those users who are not displaying the sets alphabetically.

- Use the list at the bottom of the screen to re-order the handouts in the set. Doing this will change the order for those people who are not displaying the handouts alphabetically.

- If you want to delete any handout, click the trash-barrel icon that corresponds with that handout.

- If you want to move or copy a handout from this set to another, choose **Move** or **Copy** from the last drop-down list on the screen. In the corresponding drop-down list at the right, select the set to which the handout should be copied or moved.

4   Click **Save**.

Ordering sets

This option allows you to place sets in a specific order. Note, however, that any sequence you create using this technique will not be seen by students who choose to display sets in alphabetical order, as described in "Ordering sets alphabetically" on page 464.

To order sets:

1   Navigate to the appropriate portlet instance and maximize it.

2   Select **Manage** > **Order Sets**.

The system displays the **Handouts - Order Sets View** screen.

3   Use the text boxes at the left to specify the desired order of the sets.

4   Click **Save**.

Deleting a set

When you delete a set, you also delete all of its handouts. If you definitely want to delete a set and its handouts, use the procedure below.

To delete a set:

1   Navigate to the appropriate portlet instance and maximize it.

2   Locate the set you want to delete and click the corresponding delete icon, which looks like a folder with a trash barrel on it.
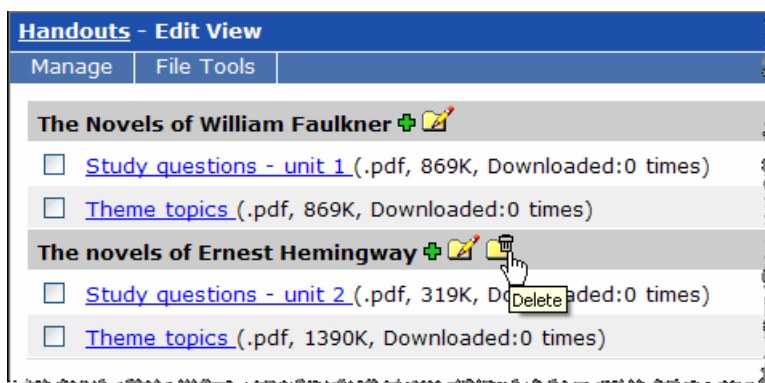
The system generates a dialog asking if you are sure you want to delete the set.

3   Click **OK**.

The system removes the set and its handouts.

Working with handouts

This section describes how to add, modify, and delete handouts, along with related tasks.

Configuring whether handouts will be displayed indefinitely

In the default setup, you (and any other authorized user) can specify the length of time that individual handouts will be displayed. That is, each handout can be associated with a specific start and end date. You specify these dates when you create or modify the handout.

However, you can configure the portlet instance so that all handouts are displayed immediately and indefinitely (until someone manually deletes them).

To configure whether handouts will be displayed indefinitely:

1   Navigate to the appropriate portlet instance and click the wrench icon.

The system displays the **Customize Portlet *Handouts*** screen, with the **Preferences** tab selected.

2   Click the **Settings** tab.

The system displays the **Settings** screen.

3   Do one of the following:

*   To make all handouts display indefinitely, de-select the **Use Display Indicator** checkbox.
*   To allow users to give their handouts a specific life span, select the **Use Display Indicator** checkbox.

4   Click **Save**.

Adding a handout

This section describes how to add a handout.

To add a handout:

1   Navigate to the appropriate portlet instance and maximize it.

2   Click the **Add a Handout** link, which is in the lower right area of the screen.

The system displays the **Handouts - Manage Handout View** screen.

3   In the **Name** field, enter a name for the handout. If you do not choose a name, the system will use the name of whatever file you upload.

Click the **Browse...** button (which corresponds with the **File** field). Follow the prompts to locate the file you want. Once you click **Open** on the **Choose file** dialog box, the system again displays the **Handouts - Manage Handout View** screen, this time with the file you chose in the **File** field.

4   Use the **Set** drop-down list to choose which set the handout will be part of.

5   If appropriate, enter text in the **Description** field. The description can be no more than 2,000 characters. It is displayed in main portlet view both when the portlet is maximized and when it is not.

6   Depending on the configuration of the portlet, the screen may include **Start** and **End** fields. The default setup is that these fields are displayed, but if you de-selected the Use Display Indicator checkbox, as described in "Configuring whether handouts will be displayed indefinitely" on page 469, these fields will not be displayed.

If applicable, use the **Start** and **End** areas of the screen to choose when the handout will display. Note that the default choice is for the handout to display immediately and indefinitely.

7   If in Step 6 you chose an end date, use the **After End** drop-down list to choose what happens to the handout when the end date is reached. The choices are:

• **Make Inactive** — The handout will be moved to section labeled Inactive, which will be visible only to people with administrative privileges for this portlet instance.

• **Delete** — The handout will be removed from the system.

8   Do one of the following:

• To finish, click **Save**.

• To save and begin the process again for a new set, click **Save and Add Another**.

Modifying a handout

At any time after you create a handout, you can do any of the following:

•   Change its name.

•   Replace the file you uploaded with a different file. For example, you might want to do this if you discovered a typo in the original file.

•   Move the handout to a different set.

•   Change the handout's description.

•   Depending on the configuration of the portlet, change the specifics about when the handout will display — that is, you can configure it to display in the future, make it display immediately, and so forth.

•   If the handout has an end date, you can modify whether the file will be deleted or made inactive after its end date.

To modify a handout:

1   Navigate to the appropriate portlet instance and maximize it.

2   Locate the handout you want to modify and click the corresponding pencil icon.

The system displays the **Handouts - Manage Handout View** screen.

3   Do any of the following, as appropriate.

• Modify the text in the **Name** fields.

- Use the **Browse...** button that corresponds with the **Replace With** field to choose a different file.
- Use the **Set** drop-down list to move the handout to a different set.
- If the screen includes **Start** and **End** fields, you can modify these as appropriate. The fields varies are not displayed if you de-selected the **Use Display Indicator** checkbox, as described in "Configuring whether handouts will be displayed indefinitely" on page 469.
- If the **After End** drop-down list is displayed, and if this handout has an end date, you can choose what happens to the handout when the end date is reached. The choices are:
  — **Make Inactive** — The handout will be moved to section labeled Inactive, which will be visible only to people with administrative privileges for this portlet instance.
  — **Delete** — The handout will be removed from the system.
  This field is not displayed if you de-selected the **Use Display Indicator** checkbox, as described in "Configuring whether handouts will be displayed indefinitely" on page 469.

4 Click **Save**.

Deleting a handout

If you need to manually remove a handout, use this procedure.

To delete a handout:

1 Navigate to the appropriate portlet instance and maximize it.

2 Locate the handout you want to modify and click the corresponding trash-barrel icon.

The system displays a dialog box asking whether you are sure you want to delete the handout.

3 Click **OK**.

Saving handouts to your File Cabinet

If you need to save one or more handouts to your File Cabinet, use this procedure.

To save handouts to your File Cabinet:

1 Navigate to the appropriate portlet instance and maximize it.

2 Using the checkboxes at the left, select the items you want to save.

3 At the bottom of the screen, set the drop-down list to **Save to File Cabinet**.

The system updates the screen to include a **Submit** button.

4 Click **Submit**.

Importing handouts from your File Cabinet

If you need to import one or more handouts from your File Cabinet, use this procedure.

To import handouts from your File Cabinet:

1   Navigate to the appropriate portlet instance and maximize it.

2   Click the link labeled **Import Handouts from File Cabinet**.

3   The system displays the **Handouts > Import View** screen.

4   Using the checkboxes at the left, select the handouts you want to import.

5   Click **Import Selected**.

The system adds the handouts to your portlet instance, placing them in the Ungrouped set.

Managing permissions

By default, only members of the Administrators and Faculty roles have permission to administer the Handouts portlet. This section explains how to grant other roles this permission.

Letting roles manage handouts

When you let a role manage handouts in an instance of the Handouts portlet, members of the role can:

- Post a handout by:
  - Uploading a file.
  - Giving it a label and description that will be displayed in the portlet instance.
  - Placing it in a set.
  - Specifying the duration of time that the handout will be displayed (if the portlet instance is configured to allow this; for details, see "Configuring whether handouts will be displayed indefinitely" on page 469).
  - If the handout is only to be displayed for a specific period of time, specifying what happens to the handout if it is no longer "active" (for example, simply make it inactive or delete it).

- Modify handouts that *any* user has uploaded by altering its name, label, the duration of time it is set to display for, and any other setting that was chosen when the handout was created.

- Deleting handouts than any user has uploaded.

To let a role manage handouts:

1 Navigate to the appropriate portlet instance and click the wrench icon.

   The system displays the **Customize Portlet *Handouts*** screen, with the **Preferences** tab selected.

2 Click the **Permissions** tab.

   The system displays the **Permissions** screen.

3 Locate the role that should have permission to manage handouts. Select the corresponding checkbox in the **Can Manage Handouts** column.

4 Click **Save**.

Letting roles manage sets

When you give a role permission to manage sets, members of the role can do any of the following:

- Post sets in that instance.

- Modify sets that they or any other user have posted by:
  - Changing the set's name.
  - Changing the set's description.
  - Modifying the default order of sets.

- Delete any set in the instance.

To let a role manage sets:

1 Navigate to the appropriate portlet instance and click the wrench icon.

 The system displays the **Customize Portlet *Handouts*** screen, with the **Preferences** tab selected.

2 Click the **Permissions** tab.

 The system displays the **Permissions** screen.

3 Locate the role that should be able to manage handouts. Select the corresponding checkbox in the **Can Manage Sets** column.

4 Click **Save**.

Letting roles view reports

If desired, you can give other roles permission to view reports on handouts.

To let a role view reports:

1 Navigate to the appropriate portlet instance and click the wrench icon.

 The system displays the **Customize Portlet *Handouts*** screen, with the **Preferences** tab selected.

2 Click the **Permissions** tab.

 The system displays the **Permissions** screen.

3 Locate the role that should be able to manage handouts. Select the corresponding checkbox in the **Can View Reports** column.

4 Click **Save**.

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Learning Tools

The Learning Tools portlet allows you to provide access to third-party content using the Basic Learning Tools Interoperability standard.

To use the Learning Tools portlet, you simply adds an instance of the portlet to a page, then configures it with the necessary details — including the URL of the learning tool, a name that will be displayed to users, and in many cases a particular OAuth key and secret that has been issued to your school by the publisher of the learning tool. Students and others who visit the portlet can click the label to open the learning tool. Note that learning tools usually open in a new window or tab, so to take the greatest advantage of this feature, users should enable pop-ups.

For more detail, log in to MyJenzabar and choose and choose **Support** > **e-Racer** > **e-Racer 1.6 Resources**. This page hosts a recorded demo on how to configure and use the portlet.

26

Readings

This chapter describes the Readings portlet, which you use to post a list of recommended or required readings.

In this chapter:

Key concepts

The Readings portlet lets you post a list of recommended or required readings for students, along with a URL to a page that lists more information about the reading — such as a link to an online bookstore or a library page.

Organization of the portlet

In each instance of the Readings portlet, you define **sets**, which are like topics or categories. Individual readings are posted within sets. For example, you might create sets that represent different topics, different authors, different units in the class, or some other common element.

For each reading you can post a variety of information, including the item's title, author, a relevant URL, and so forth.

By default, an instance of this portlet is located on the Syllabus page of a course. You can create additional instances of the portlet anywhere within your course context.

Default locations

The default layout for course contexts includes an instance of the Readings portlet on the Syllabus page. If desired, you may be able to create additional instances. If you need help with adding a portlet to a page, see "Creating a portlet instance" on page 571.

Portlet basics

The section describes a few features of the Readings portlet that your students — and you — will use when navigating the portlet, as well as few other basics.

Default view versus maximized view

The main page of the portlet displays the name and description of each set, along with each set's individual readings. In this view, each listing shows whether or not the reading is required.

If you maximize the portlet, you can expand (**Show**) or collapse (**Hide**) the list of readings associated with each set. In this view, the listing for each reading shows additional details, such as the author and the number of pages.

Displaying details on any reading

As noted in "Default view versus maximized view," the default view shows some details on the initial view of the portlet, and more are displayed after the portlet is maximized.

You can display *all* details about the reading by clicking the name of the reading. In response, the system displays the **Readings - View Reading Details** screen, which lists all the details that were entered when the reading was created.

Setting preferences

While using the Readings portlet, you can adjust your own personal view of the portlet instance using any of the following procedures:

- Ordering readings alphabetically

- Ordering sets alphabetically

- Displaying empty sets

Note that students and any other users of the portlet can also adjust their view using these procedures. For this reason, bear in mind that whenever you create a specific order for either readings or sets, students will not necessarily see that sequence.

Ordering readings alphabetically

If appropriate, you can have the system display readings alphabetically within each set.

When readings are ordered alphabetically, the system ignores any sequence that may have been specified when you (or another authorized user) configured each set, as described in "Working with sets" on page 481.

To order readings alphabetically:

1   Navigate to the appropriate portlet instance and click the wrench icon.

2   Click the **Preferences** tab.

3   Select the checkbox labeled **Order Readings Alphabetically**.

4   Click **Save**.

5   Click **Exit**.

The system now orders all readings alphabetically (within your personal view).

Ordering sets alphabetically

If appropriate, you can have the system display sets alphabetically within the portlet instance.

When sets are ordered alphabetically, the system ignores any sequence that you (or another authorized user) might have previously specified, as described in .

To order sets alphabetically:

1   Navigate to the appropriate portlet instance and click the wrench icon.

2   Click the **Preferences** tab.

3   Select the **Order Sets Alphabetically** check box.

4   Click **Save**.

5   Click **Exit**.

The system now orders all set alphabetically (within your personal view).

Displaying empty sets

By default, the system does not display sets that contain no readings. However, you can choose to display them in your view of the portlet.

From the Readings portlet:

1   Navigate to the appropriate portlet instance and click the wrench icon.

2   Click the **Preferences** tab.

3   Select the **Show Empty Sets** check box to display sets for which no readings are available. If this preference is not selected, the default Ungrouped set does not display.

4   Click **Save**.

5   Click **Exit**.

The system now orders all set alphabetically (within your personal view)

Working with sets

Sets are like categories into which you can group similar readings. By default, each instance of the Readings portlet has one set called **Ungrouped**. By default, a new reading will be placed into this set, but you can create and populate additional sets.

Note that by default the system will not display an empty set unless the user chooses to manually display it. So if you add a set and don't see it, you probably have your preferences set to hide empty sets. To display empty sets, follow the steps described in "Displaying empty sets" on page 480.

Adding a set

You can add as many sets as is appropriate for your course. Note that a set is used only by the instance where you create it. If you have multiple instances of the Readings portlet, you create different sets for each one.

To add a set:

1 Navigate to the appropriate portlet instance and maximize it.

2 Click the **Add a Set** link, which is in the lower right area of the screen.

The system displays the **Readings - Manage Set View** screen.

3 In the **Name** field, enter a name for the set.

4 If appropriate, enter text in the **Description** field. The description can be no more than 2,000 characters. This text will be displayed in main portlet view both when the portlet is maximized and when it is not.

5 Use the **Position** drop-down list to specify where the set should be placed in relation to other sets. However, note that the choice you make at this juncture will not be seen by students who choose to display sets in alphabetical order, as described in "Ordering sets alphabetically" on page 480.

6 Do one of the following:

•   To finish, click **Save**.
•   To save and start creating another set, click **Save and Add Another**.

Modifying a set

At any time after you create a set, you can do any of the following:

•   Change its name.

•   Change its description.

•   Change the position of set relative to other sets. (However, note that the sequence will not be seen by students who choose to display sets in alphabetical order, as described in "Ordering sets alphabetically" on page 480.)

- Re-order the readings within the set. (However, note that the sequence will not be seen by students who choose to display sets in alphabetical order, as described in "Ordering sets alphabetically" on page 480.)

- Delete a reading.

- Move or copy a reading to a different set.

To modify a set:

1 Navigate to the appropriate portlet instance and maximize it.

2 Locate the set that you want to modify and click the corresponding Edit icon, which looks like a folder with a pencil on it.
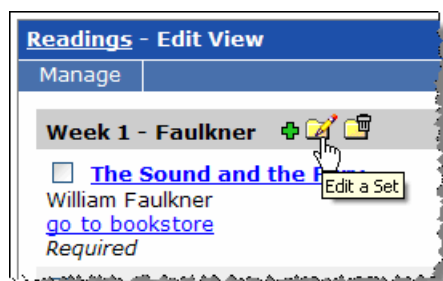
The system displays the **Readings - Manage Set View** screen.

3 Do any of the following, as appropriate.

- Modify the text in the **Name** and **Description** fields.
- Change the value in the **Position** drop-down list. This will change the position of the set relative to other sets, for those users who are not displaying the sets alphabetically.
- Use the list at the bottom of the screen to re-order the readings in the set. Doing this will change the order for those people who are not displaying the readings alphabetically.
- If you want to delete any reading, click the trash-barrel icon that corresponds with that reading.
- If you want to move or copy a reading from this set to another, choose **Move** or **Copy** from the last drop-down list on the screen. In the corresponding drop-down list at the right, select the set to which the reading should be copied or moved.

4 Click **Save**.

Ordering sets

This option allows you to place sets in a specific order. Note, however, that any sequence you create using this technique will not be seen by students who choose to display sets in alphabetical order, as described in "Ordering sets alphabetically" on page 480.

To order sets:

1 Navigate to the appropriate portlet instance and maximize it.

2   Select **Manage** > **Order Sets**.

The system displays the **Readings - Order Sets View** screen.

3   Use the text boxes at the left to specify the desired order of the sets.

4   Click **Save**.

Deleting a set

When you delete a set, you also delete all of its readings. If you definitely want to delete a set and its readings, use the procedure below.

To delete a set:

1   Navigate to the appropriate portlet instance and maximize it.

2   Locate the set you want to delete and click the corresponding delete icon, which looks like a folder with a trash barrel on it.

The system generates a dialog asking if you are sure you want to delete the set.

3   Click **OK**.

The system removes the set and its readings.

Working with readings

This section describes how to add, modify, and delete readings, along with related tasks.

Adding a reading

This section describes how to add a reading.

To add a reading:

1   Navigate to the appropriate portlet instance and maximize it.

2   Click the **Add a Reading** link, which is in the lower right area of the screen.

    The system displays the **Readings - Manage Reading View** screen.

3   In the **Title** field, enter a name of the reading. This field is required.

4   In the **Author** field, enter a name of the author. This field is required.

5   If desired, enter any other necessary details in the **Edition/Publisher** field.

6   If there is a supporting URL you want to include, fill out the following fields:

    •   In the **URL** field, enter the full URL, including a protocol such as `http://`.

    •   In the **URL** label, if desired enter an informative label such as **Click here to go to university bookstore**.

7   If appropriate, enter the number of pages in the **Pages** field.

8   Use the **Status** field to choose one of the following:

    •   Required
    •   Optional
    •   Suggested
    •   Extra Credit

    Each of these labels exists solely to communicate more information to the student about the reading — the label has no technical function.

    By default, this drop-down list is set to **Required**.

9   Use the **Set** drop-down list to choose which set the reading will be part of.

10 If appropriate, enter text in the **Description** field. The description can be no more than 2,000 characters. This text will be displayed on the **Readings - View Reading Details** screen for this item.

11 Do one of the following:

    •   To finish, click **Save**.
    •   To save and begin the process again for a new set, click **Save and Add Another**.

Modifying a reading

At any time after you create a reading, you can modify any of the values you chose when you created it.

To modify a reading:

1   Navigate to the appropriate portlet instance and maximize it.

2   Locate the reading you want to modify and click the corresponding pencil icon.

    The system displays the **Readings - Manage Reading View** screen.

3   Modify any of the fields as appropriate.

4   Click **Save**.

Deleting a reading

If you need to manually remove a reading, use this procedure.

To delete a reading:

1   Navigate to the appropriate portlet instance and maximize it.

2   Locate the reading you want to modify and click the corresponding trash-barrel icon.

    The system displays a dialog box asking whether you are sure you want to delete the item.

3   Click **OK**.

Saving readings to your File Cabinet

If you need to save one or more readings to your File Cabinet, use this procedure.

To save readings to your File Cabinet:

1   Navigate to the appropriate portlet instance and maximize it.

2   Using the checkboxes at the left, select the items you want to save.

3   At the bottom of the screen, set the drop-down list to **Save to File Cabinet**.

    The system updates the screen to include a **Submit** button.

4   Click **Submit**

Importing readings from your File Cabinet

If you need to import one or more readings from your File Cabinet, use this procedure.

To import readings from your File Cabinet:

1 Navigate to the appropriate portlet instance and maximize it.

2 Click the link labeled **Import Readings from File Cabinet**.

3 The system displays the **Readings > Import View** screen.

4 Using the checkboxes at the left, select the readings you want to import.

5 Click **Import Selected**.

The system adds the readings to your portlet instance, placing them in the Ungrouped set.

Managing permissions

In some cases, you may want to allow members of another role to assist you with management of the Readings portlet. This section explains how to grant other roles this permission.

Letting roles manage readings

By default, only the Administrators and Faculty roles have permission to post readings. However, in any instance of the Readings portlet, you can give any role the ability to post and manage readings. When you do this, members of the role can do any of the following:

- Post readings in that instance.

- Modify readings that they or any other user have posted by:
  - Changing the name and description of the reading.
  - Changing the URL that's referenced.
  - Making the reading required or optional.

- Delete any reading in the instance.

To let a role manage readings:

1 Navigate to the appropriate portlet instance and click the wrench icon.

   The system displays the **Customize Portlet *Readings*** screen, with the **Preferences** tab selected.

2 Click the **Permissions** tab.

   The system displays the **Permissions** screen.

3 Locate the role that should be able to manage readings. Select the corresponding checkbox in the **Can Manage (Add/Edit/Delete) Readings** column.

4 Click **Save**.

Letting roles manage sets

By default, only the Administrators and Faculty roles have permission to manage sets. However, in any instance of the Readings portlet, you can give other roles this ability. When you do this, members of the role can do any of the following:

- Create sets in that instance.

- Modify sets that they or any other user has posted by:
  - Changing the set's name.
  - Changing the set's description.
  - Modifying the default order of sets.

- Delete any set in the instance.

To let a role manage sets:

1   Log in to the appropriate portlet instance and click the wrench icon.

 The system displays the **Customize Portlet *Readings*** screen, with the **Preferences** tab selected.

2   Click the **Permissions** tab.

 The system displays the **Permissions** screen.

3   Locate the role that should be able to post readings. Select the corresponding checkbox in the **Can Manage Sets** column.

4   Click **Save**.

RSS News Reader

This chapter explains how to set up an instance of the RSS News Reader.

In this chapter:

Key concepts

The RSS News Reader portlet lets users read items generated by feeds that comply with the RSS 2.0 specification. The default layout for course sections does not include this portlet, but if desired you can add one.

You can also set up each instance of the portlet to include categories that represent groups of feeds.
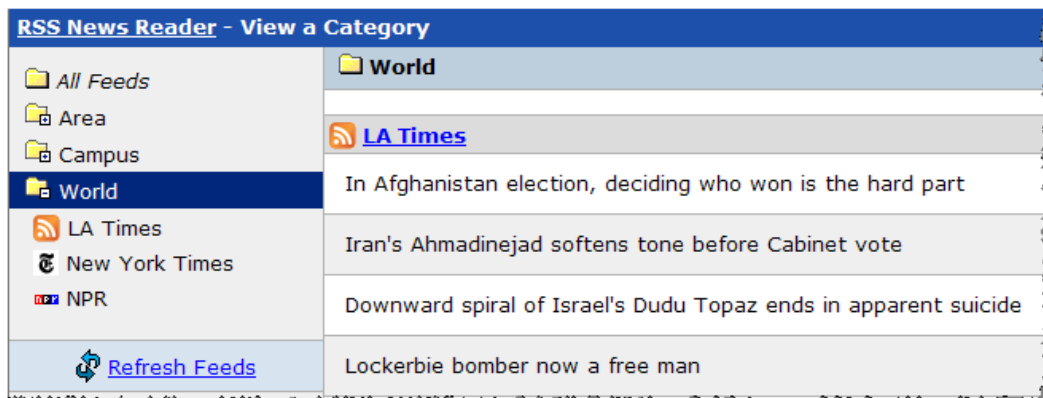
Notes about permissions

Note the following:

- Anyone who can access a page that hosts the RSS News Reader portlet can also display and browse the portlet.

- Only those with administrative privileges can create categories and subscribe to RSS feeds.

- For each instance of the portlet, you can give administrative privileges to any role as appropriate.

No default locations

In the default layout of the portal, there are no instances of the RSS News Reader portlet, but you may be able this portlet to your course section's pages, to a Campus Groups context that you lead, or to another context that you might manage. If you need help with adding a portlet to a page, see .

Subscribing to a feed

If you want items from an RSS feed to be available to readers of an RSS News Reader portlet instance, subscribe the instance to the feed.

To subscribe to a feed:

1   Navigate to the appropriate portlet instance and click the **Add Feed** link.
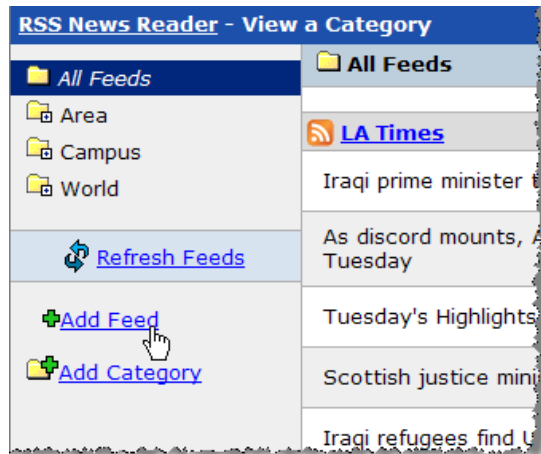
The system displays a form.

2   In the **Feed Location** field, enter the XML feed. Note that the portlet is designed to handle feeds compliant with the RSS 2.0 specification only — using other types of feeds might result in error messages.

3   In the **Feed Name** field, enter a name for the feed that will be meaningful to users.

4   In the **Category** field, do one of the following as appropriate:

   •   Select a category that you want the feed to be grouped with, if appropriate.

   •   Create and select a category:

      a   Click **Add Category**.

      b   In the form displayed, enter a name for the category.

      c   Click **Save**.

      d   On the **Add a Feed** form, select the new category from the drop-down list.

5   Click **Save**.

Creating a category

If the portlet instance will be host to numerous RSS feeds, you might want to create categories to group them. Categories are displayed as yellow folder icons that can be expanded or collapsed to show or hide the feeds they contain.

Note that you can also create a category as part of the process of adding a feed, as described in .

To create a category:

1   Navigate to the appropriate portlet instance and click **Add Category**.

2   In the form displayed, enter a name for the category.

3   Click **Save**.

Managing permissions

If you want to grant another role permission to subscribe to RSS feeds and create categories, you must give that role administrative privileges. These privileges are granted at the portlet-instance level.

To let a role manage categories and feeds:

1   Navigate to the appropriate portlet instance and click the wrench icon.

    The system displays the **Customize Portlet** *RSS News Reader* screen, with the **Preferences** tab selected.

2   Click the **Permissions** tab.

    The system displays the **Permissions** screen.

3   Locate the role that should be able to manage categories and feeds. Select the corresponding checkbox in the **Can Administer Portlet** column.

4   Click **Save**.

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Task Manager

This chapter explains how to set up Task Manager.

In this chapter:

- Key concepts
- Creating a task
- Managing permissions

Key concepts

This section offers an overview of the Task Manager portlet.

Portlet basics

The Task Manager portlet lets you assign tasks to other users or roles, or create a to-do list for yourself. For example, you might create tasks for the teaching assistants assigned to your course section.

People who have tasks assigned to them will see those items listed in the portlet instance. They also have the ability to mark a task as completed, in progress, and so forth.

No default location

In the default layout of the portal, there are no instances of the Task Manager portlet — but you may be able to add this portlet to your course section's pages, to a Campus Groups context that you lead, or to any other context that you might manage. If you need help with adding a portlet to a page, see "Creating a portlet instance" on page 571.

Creating a task

Use this procedure to create a task, either for yourself or for others.

To create a task:

1 Navigate to the appropriate instance of the Task Manager portlet and maximize it.

The system displays the maximized view of the portlet instance. By default, the system displays the tab labeled **My To-Do List**.

2 Do one of the following:

- If you want to create a task for yourself, click the link labeled **Add a New Task**.
- If you want to create a task for someone else, select the **Tasks I Assigned** tab, then click **Add a New Task**.
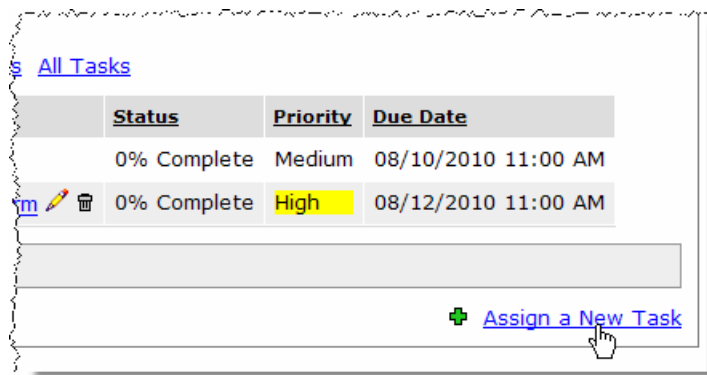
The system displays a form.

3 Fill out the form as follows:

- In the **Name** field, enter a short label for task.
- If this is a task for someone else, use the **Assign To** area to select the person or role to which you want to assign this task.
- In the **Description** field, enter a description of the task.
- If this is a task for someone else, use the **Due Date** area to set a deadline.
- If this is a task for you, use the **Status** area to describe the current state of the task.
- Use the **Priority** drop-down list to select a priority.

4 Click **Save**.

Managing permissions

By default, users can create tasks for themselves, but only members of the Faculty role can create tasks for other people. If you want another role to be able to do this, use the following procedure.

To allow a role to assign tasks to other users:

1   Navigate to the appropriate portlet instance.

2   Click the wrench icon.

    The system displays the **Customize Portlet** *Task Manager* screen, with the **Preferences** tab selected.

3   Click the **Permissions** tab.

    The system displays the **Permissions** screen.

4   Locate the role that should be able to assign tasks. Select the corresponding checkbox in the **Can Assign Tasks** column.

5   Click **Save**.

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Usage Statistics

If your site has enabled logging, then you can use the Usage Statistics portlet to review detailed information about user behavior in any context where you have administrative privileges (such as your course context, or a Campus Group that you lead).

In this chapter:

- Key concepts
- Displaying an overview of a context's usage
- Reviewing activity by visitor
- Reviewing activity by page
- Displaying a list of all activity in the context

Key concepts

The Usage Statistics portlet helps you understand how a context is being used. You can use this feature to see which pages generate the most traffic and which people are most active, among other details.

Key terms

This section defines a few key terms and icons used on the Usage Statistics screen.

active — A page or portlet is said to be active if it has been viewed many times.

action — An action can be the posting of an item in a Forums portlet instance, the viewing of an item in a Handout portlet instance, or any of several other events. The Usage Statistics portlet displays details about several different types of actions.

visit — A visit occurs when someone displays the context. A single visit could include one page view, or many page views.

visitor — A visitor is someone who navigates to the context.

See also "Understanding the default screen" on page 500 for an explanation of the terms used on that page.

Key icons

The portlet uses a set of icons that characterize how active a visitor, portlet, or page has been relative to others within the same context:

   Indicates activity that is well above average.

   Indicates above-average activity.

   Indicates an average level of activity.

   Indicates below-average activity.

   Indicates activity that is well below average.

Displaying an overview of a context's usage

To get a general overview of what is happening in the context, you display the main screen. From here, you can also drill down to display details that are more granular.

Navigating to the default Usage Statistics screen

You navigate to the default Usage Statistics screen if you want to do either of the following:

- See an overview of usage statistics for a context.

- Start navigating toward more-granular data, such as by-page or by-visitor statistics.

To display the main screen:

1 Log in to the portal as someone with administrative privileges in an e-Racer course section or a Campus Group.

2 Navigate to the section for which you want to view statistics.

3 Click the **Usage Statistics** link, which is located beneath the **Context Manager** link.
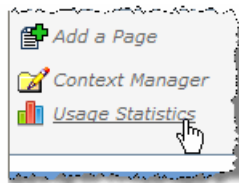
The system displays the default Usage Statistics screen for this context. The information on this screen is described more fully in "Understanding the default screen" on page 500.

From here, you can also display details such as:

- A list of all visitors who have navigated to the context, as described in "Reviewing activity by visitor" on page 501.
- A list of all pages in the context, with statistics about those pages, as described in "Reviewing activity by page" on page 506.

Understanding the default screen

The default Usage Statistics portlet screen offers a high-level picture of activity in the context.
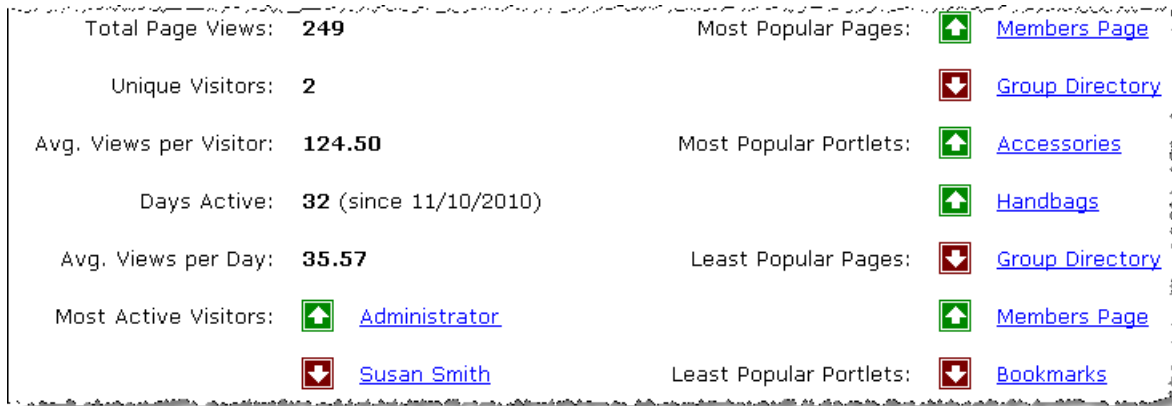
The following table offers additional details about each field in the default screen.

Field	Meaning
Total Page Views	The total number of page views by all visitors, of all pages in the context.
Unique Visitors	The total number of different people who visited the context.
Avg. Views per Visitor	The total number of page views divided by the total number of unique visitors.
Days Active	The number of days since the first activity was logged.
Avg. Views per Day	The average number of pages viewed each day.
Most Active Visitors	The two people who are most active in the context (that is, who have viewed the most pages).
Most Popular Pages	The two pages in the context that have been viewed most often.
Most Popular Portlets	The two portlet instances in the context that have been viewed most often.
Least Popular Pages	The two pages in the context that have been viewed least often.
Least Popular Portlets	The two portlet instances in the context that have been viewed least often.

Reviewing activity by visitor

If you want to see a list of people who are active in the context and where each visitor's activity has been, you can navigate to the **Activity by Visitor** screen.

Navigating to the Activity by Visitor screen

Use this procedure to display:

- A list of all visitors who have been active in the context.

- A list of any context members who have not yet visited any pages.

Note that the way you navigate to the **Activity by Visitor** screen varies a bit depending on where you begin from.

To navigate to the Activity by Visitor screen:

Do one of the following:

- Start from the default view:

  a Open the Usage Statistics portlet for the appropriate context, as described in .

  b Click **Activity by Visitor**.
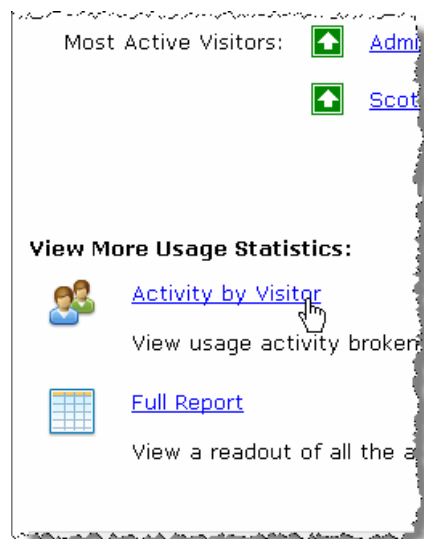
- If you have already navigated to a lower-level usage statistics screen, look for the **View Activity by Visitor** link in a box on the right-hand side of the screen. (The exact display of this box will vary depending on where you are in the application.)
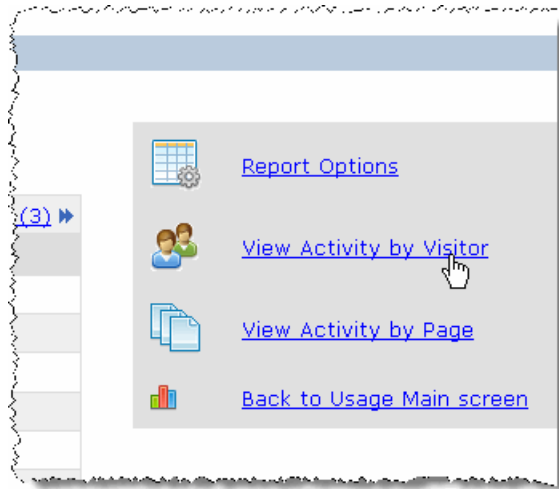
The system displays a screen titled **All Activity by Person**. This screen lists all the users who have visited the context, along with some additional details.

From here you can click the name of any person to display more details about their activity, as described in .

Reviewing details about an individual visitor's activity

For those people who have been active in the context, you can drill down to see specific information about each visitor. This section explains how to review those details.

Navigating to the Activity by Visitor > Usage Detail screen

If you want to review details about an individual user's activity, display the **Activity by Visitor** > **Usage Detail** screen

To navigate to the Activity by Visitor > Usage Detail screen:

1 Navigate to the **Activity by Visitor** screen, as described in .

2 Click the name of any user to display the **Usage Detail** screen for that user.
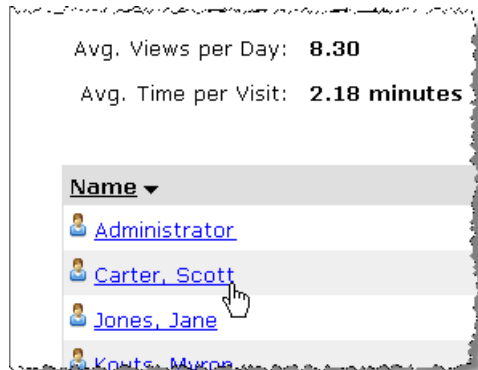
The system displays the **Activity by Visitor** > **Usage Detail** screen for the user you selected. For help understanding this screen, see the next section.

Understanding the Activity by Visitor > Usage Detail screen

The **Activity by Visitor** > **Usage Detail** screen for each visitor include data such as the following:

- The person's total page views in the context.

- The page that the person has viewed most.

- The person's average page views per day.

- The time of the person's most recent visit.

- The average time per visit.

- A list of all pages this person has viewed, and the number of views of each page.

From this screen you can drill down further to see the following:

- A list of which portlets (on a specific page) that the person has viewed. To see this list, click the name of any page that is listed.

- A list of each of the person's sessions, and details about each session. To display this, click **View** *[Person's]* **Activity History**.
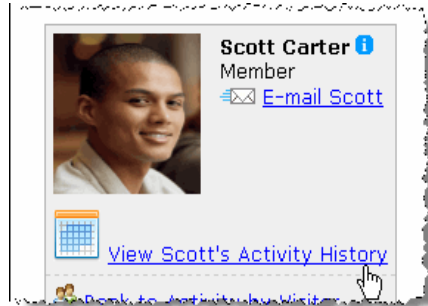
Reviewing activity by page

If you want to see a list of all pages in the context and details about the usage of each one, navigate to the **Activity by Page** screen.
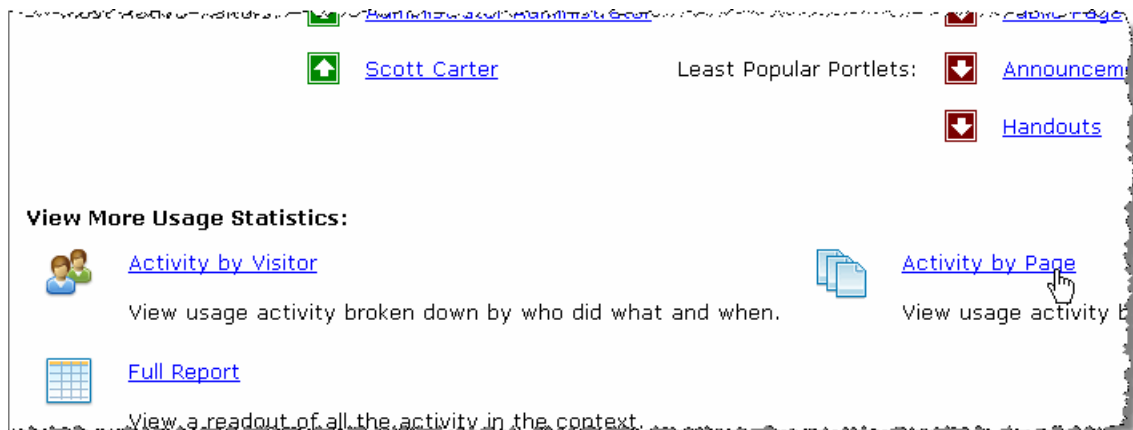
Navigating to the Activity by Page screen

Use this procedure to display a list of all pages in the context and a summary of usage statistics about each one.

Note that the way you navigate to the **Activity by Page** screen varies a bit depending on where you begin from.

To navigate to the Activity by Page screen:

Do one of the following:

- Start from the default view:

  a Open the Usage Statistics portlet for the appropriate context, as described in "Displaying an overview of a context's usage" on page 499.

  b Click **Activity by Page**.

- If you have already navigated to a lower-level usage statistics screen, look for the **View Activity by Page** link in a box on the right-hand side of the screen. (The exact display of this box will vary depending on where you are in the application.)
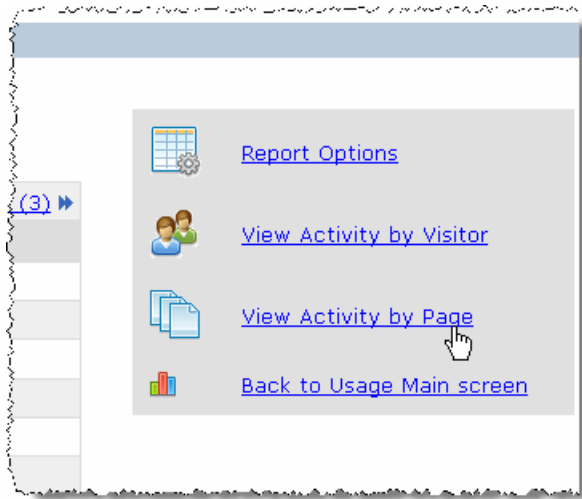


The system displays the **Activity by Page** screen.

Navigating to the Activity by Page > Page Detail screen

If you want to review details about activity on an individual page, display the **Activity by Page** > **Page Detail** screen. This screen includes details such as the following:

- The total number of views of that page.

- A tally of the unique number of visitors who have viewed the page.

- A list of all portlets on the page, with details about the traffic to each portlet.

To navigate to the Activity by Page > Page Detail screen:

1   Navigate to the **Activity by Page** screen, as described in .

2   Click the name of the appropriate page.
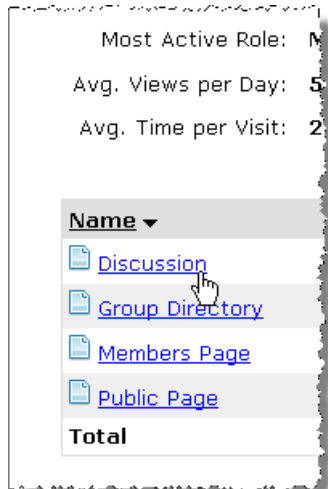
Displaying a list of all activity in the context

At times you may want to display a list of all activity in the context. You do this by displaying the "full report." By default, the activity is listed chronologically, but you can change this.

To display a list of all activity in the context:

1   Do one of the following:

- Start from the default view:

   a   Display the default Usage Statistics screen, as described in "Navigating to the default Usage Statistics screen" on page 499.

   b   Click the **Full Report** link.
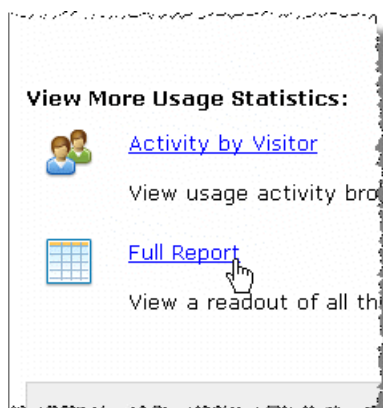
- If you have already navigated to a lower-level usage statistics screen, look for the **View Full Report** link in a box on the right-hand side of the screen. (The exact display of this box will vary depending on where you are in the application.)
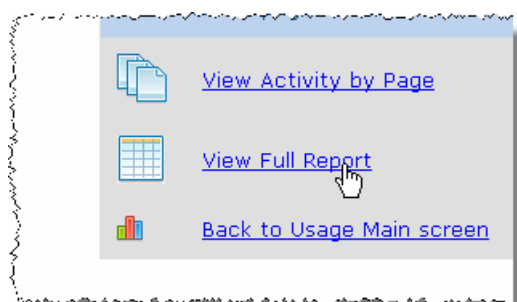
The system displays the report.

Usage Statistics		
Usage Statistics > Full Report		
Full Report		

Activity Report
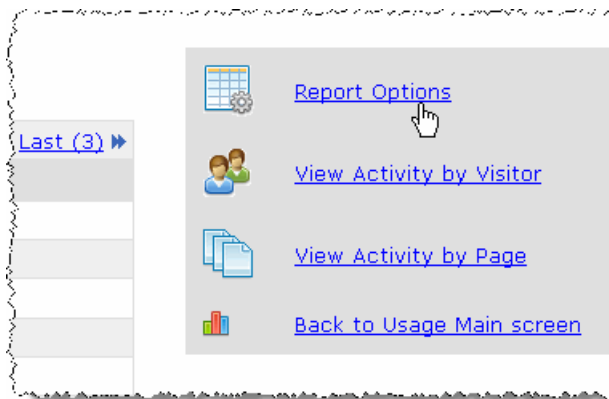This report shows all the activity in the Grace Kelly Appreciation context.

◀◀ First ◀ Previous   1 | 2 | 3

Date/Time	Visitor	Action
12/13/2010 10:57:40 AM	Carter, Scott	Visited Discussion Page
12/13/2010 10:57:39 AM	Carter, Scott	🔍 Viewed Forums Forum Thread
12/13/2010 10:57:39 AM	Carter, Scott	🔍 Viewed Forums Portlet
12/13/2010 10:57:39 AM	Carter, Scott	Visited Discussion Page
12/13/2010 10:57:39 AM	Carter, Scott	➕ Added Forums Forum Thread
12/13/2010 10:57:39 AM	Carter, Scott	🔍 Viewed Forums Portlet
12/13/2010 10:57:35 AM	Carter, Scott	Visited Discussion Page
12/13/2010 10:57:34 AM	Carter, Scott	🔍 Viewed Forums Portlet
12/13/2010 10:57:33 AM	Carter, Scott	🔍 Viewed Forums Forum Topic
12/13/2010 10:57:33 AM	Carter, Scott	Visited Discussion Page
12/13/2010 10:57:32 AM	Carter, Scott	🔍 Viewed Forums Portlet
12/13/2010 10:57:30 AM	Carter, Scott	Visited Discussion Page
12/13/2010 10:57:29 AM	Carter, Scott	🔍 Viewed Forums Portlet
12/13/2010 10:57:18 AM	Administrator	Visited Discussion Page
12/13/2010 10:57:18 AM	Administrator	❌ Deleted Forums Forum Topic
12/13/2010 10:57:18 AM	Administrator	🔍 Viewed Forums Portlet

2   If you want to customize the display of the report details, click the link labeled **Report Options**, at the right.

Last (3) ▶▶

Report Options

View Activity by Visitor

View Activity by Page

Back to Usage Main screen

The system displays a dialog box with options for sorting and limiting the report details.
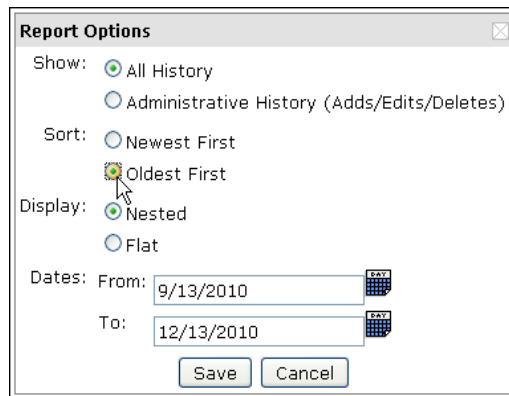
3   Make any changes necessary and click **Save**.

The system re-displays the data according to your preferences.

Part 5: Saving and reusing material

The section describes tasks features that let you save material to use in different course contexts, or outside the portal.

In this section:

30

Working with the File Cabinet

If you want to save assignments and reuse them in future course sections, you can do so using the File Cabinet. You can also save bookmarks, handouts, readings, and course cartridges.

In this chapter:

Key concepts

Your File Cabinet is a portlet located within your My Pages context (on a page also called **File Cabinet**). Only you have access to your File Cabinet.

You can use your File Cabinet to store any of the following:

- Bookmarks
- Coursework
- Course Cartridges
- Handouts
- Readings

Because the File Cabinet is integrated tightly with many other portlets, sometimes you interact with the File Cabinet from other locations. This chapter covers the process of organizing items within the File Cabinet and using the File Cabinet to create items. For details on other sections in this guide that deal with the File Cabinet, see the sections below.

Saving to the File Cabinet

There are a few ways to save items to the File Cabinet.

Saving from another portlet

If you prefer to save items to the File Cabinet from within other portlets, note that those processes are covered elsewhere in this guide, see the sections detailed in the following table.

Type of item	Corresponding section
Bookmarks	"Saving a bookmark to the File Cabinet" on page 346 in Chapter 15
Course cartridges	"Uploading a cartridge from outside the portal" on page 546 in Chapter 33
Coursework	"Saving to the File Cabinet" on page 93 in Chapter 3
Handouts	"Saving handouts to your File Cabinet" on page 471 in Chapter 24
Readings	"Saving readings to your File Cabinet" on page 485 in Chapter 26

Saving items from a course cartridge

If desired, you can also move individual items — such as bookmarks and assignments — from within a course cartridge to the File Cabinet. You do this by loading a course cartridge into the CCI portlet instance then using the steps described in "Integrating content into another portlet" on page 551.

Creating items in the File Cabinet

In some cases, you can use the File Cabinet to create items. This process is described in this chapter, in the following sections:

- Adding a bookmark
- Adding a handout
- Adding a reading

You cannot create coursework or upload course cartridges from within the File Cabinet.

Importing from your File Cabinet

The primary function of the File Cabinet is to save items so that you can reuse them later. To get an item from the File Cabinet into a new course context, you navigate to the portlet instance where you want to use the item and import from there. For details, see the sections detailed in the following table.

Type of item	Corresponding section
Bookmarks	"Importing a bookmark from the File Cabinet" on page 346 in Chapter 15
Course cartridges	"Loading a cartridge from the File Cabinet" on page 548 in Chapter 33
Coursework	"Importing an assignment from the File Cabinet" on page 90 in Chapter 3 "Importing questions from the File Cabinet" on page 114 "Importing sections from the File Cabinet" on page 110
Handouts	"Importing handouts from your File Cabinet" on page 471 in Chapter 24
Readings	"Importing readings from your File Cabinet" on page 485 in Chapter 26

Navigating to the File Cabinet

You may want to display the File Cabinet for any of the following reasons:

- To browse the items stored there.

- To organize saved items into folders. You might do this if you have saved a particularly large number of items.

- To delete any items that you have saved, including individual questions or sections from online assignments.

- If you want to create and save any of the following:
  - A new reading.
  - A new handout.
  - A new bookmark.

- To rename items that are stored there.

You should not use your browser's Back button within the File Cabinet. To navigate within this portlet, either use the "Up one level" link or the breadcrumbs at the top of the screen.

To navigate to the File Cabinet:

1   Do one of the following —

- Start by navigating to your My Pages context:
  a   Click the **My Pages** tab.
  b   In the left-hand pane, click the **File Cabinet** page.
- Start from the sidebar:
  a   From anywhere in the portal, expand the **My Pages** link in the sidebar.
  b   Click the **File Cabinet** link.

The system displays the File Cabinet portlet, with the Coursework tab displayed by default.
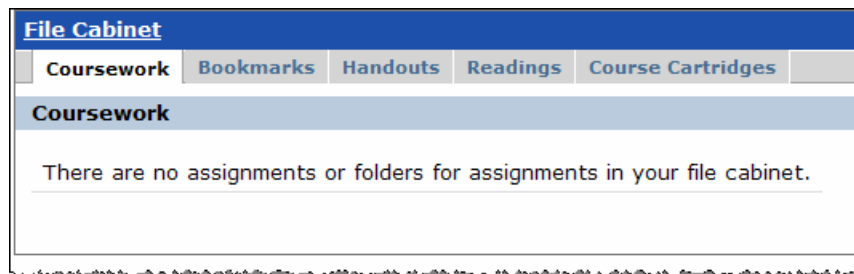
2   If appropriate, see any of the following sections for further guidance on what you can do from this point:

- • "Using the Coursework tab" on page 520.
- • "Using the Bookmarks tab" on page 528.
- • "Using the Handouts tab" on page 530.
- • "Using the Readings tab" on page 532.
- • "Working with folders" on page 535.

Using the Coursework tab

The Coursework portlet lists assignments that you have saved. You can use this tab to do any of the following:

- Browse and display details about saved assignments.

- Delete or rename an assignment.

- Delete or rename a section.

- Search for questions, review them, and/or delete them.
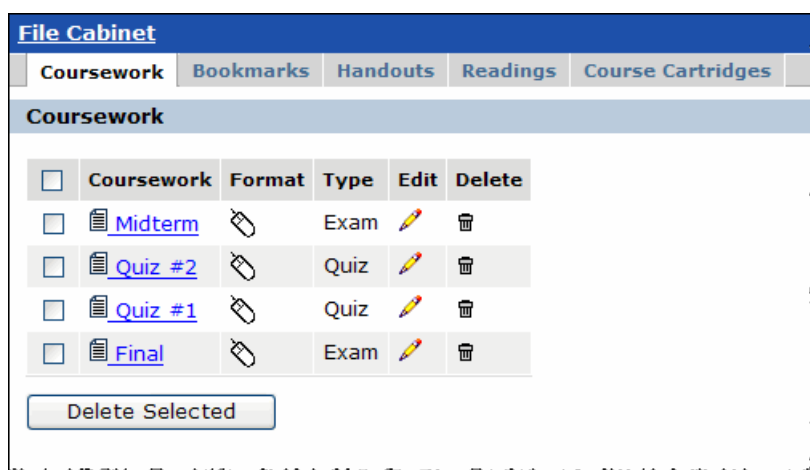
For help creating folders into which you can organize your saved assignments, see "Working with folders" on page 535.

Understanding the default view

The default view shows the format and type of each assignment that you have saved. If you have organized some of your assignments into folders, these are listed first, and you can click any folder to display its assignments.

When you are looking at a list of assignments, the system displays each assignment's name, format, and type. (For an explanation of these values, see "Assignment classifications" on page 38.)

Note that the File Cabinet does not indicate the course section that the assignment originally was created for, so if you need to sort assignments by course or by course section, you should create a folder for each of these.

Working with assignments

From within File Cabinet, you can do any of the following relative to assignments:

- Rename an assignment.
- Delete an assignment.

Renaming an assignment

Use this procedure to change the name of an assignment.

To rename an assignment:

1   If you haven't already done so, display the File Cabinet, as described in .

2   Locate the assignment whose name you want to change. Click the corresponding pencil icon.

    The system displays the **Rename:** *AssignmentName* screen.

3   Modify the text in the **Name** field as appropriate.
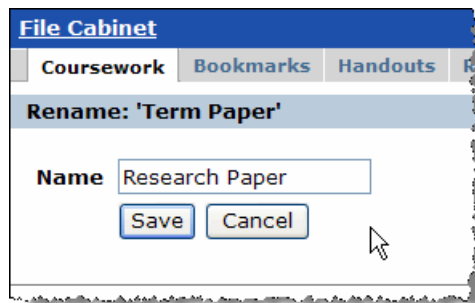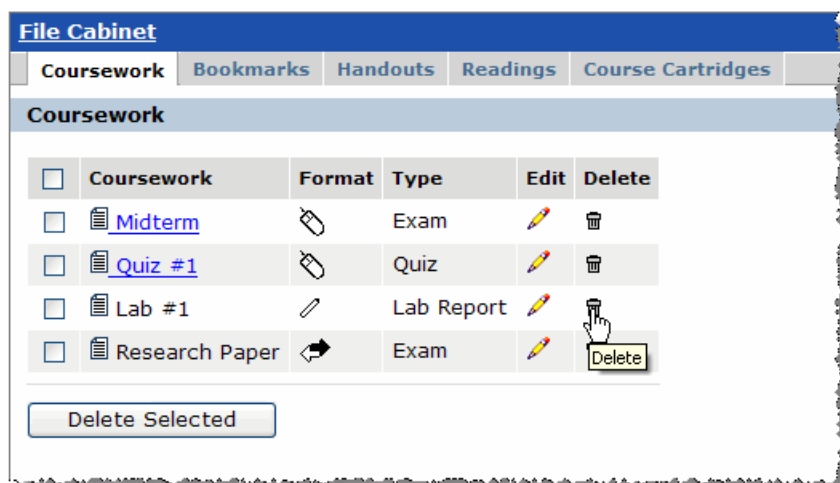

    Click **Save**.

Deleting assignments

Use this procedure to delete one or more assignments, along with all the sections and questions contained in those assignments.

To delete one or more assignments:

1   If you haven't already done so, display the File Cabinet, as described in .

2   Locate the assignment(s) that you want to delete. Click the corresponding trash-barrel icon.

The system displays asking if you are sure you want to delete the assignment(s).

3   Click **OK**.

As an alternative, you can use the checkboxes at the left to select multiple items to delete, then click the Delete Selected button.

Working with sections

From within the File Cabinet, you can do any of the following relative to sections:

• Display a list of the sections in an assignment.

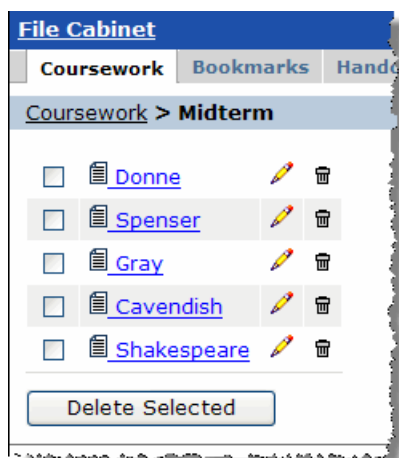• Rename sections.

• Delete sections.

Displaying an assignment's sections

Use this procedure to display a list of sections in an assignment and, optionally, a list of questions in any section.

To display an assignment's sections:

1   If you haven't already done so, display the File Cabinet, as described in).

2   Click the name of the assignment.

In response, the system displays a list of sections.


Renaming a section

Use this procedure to change the name of a section.

To rename a section:

1   If you haven't already done so, locate the assignment that contains the section whose name you want to change. Click the name of the assignment to display a list of its sections (as described in "Displaying an assignment's sections" on page 522).

2   Locate the name of the section that you want to change and click the corresponding pencil icon.

The system displays the **Rename:** *Section* screen.

3   As appropriate, modify the text in the **Name** field.
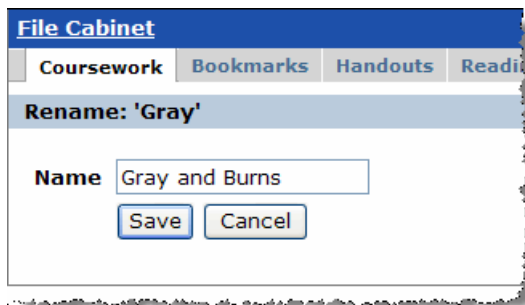
4   Click **Save**.

Deleting sections

Use this procedure to delete one or more sections, along with all the questions contained in those sections.

To delete one or more sections:

1 If you haven't already done so, locate the assignment that contains the section you want to delete. Click the name of the assignment to display a list of its sections (as described in "Displaying an assignment's sections" on page 522).

2 Using the column at the left, select the section(s) that you want to delete.

3 Click **Delete Selected**.

The system displays asking if you are sure you want to delete the section(s).

4 Click **OK**.

Working with questions

This section describes tasks you can complete relative to questions, including the following:

- Displaying a section's questions
- Searching for questions
- Deleting a question

Note that you cannot modify the text of a question or its answer from within the File Cabinet. To modify either of these, you must import the question into an assignment using Test Builder, make changes, and save it again to the File Cabinet.

Displaying a section's questions

Use this procedure to display a list of questions in any section.

To display a section's questions:

1 If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518).

2 Click the name of the assignment.

In response, the system displays a list of sections.

3 Click the name of any section.

The system displays a list of questions.

This list includes the text of each question and the question's type. It does not contain the question's answer. To work with the answer, you must import the question into an assignment using the Coursework portlet, as described in "Adding content to online tests" on page 101.
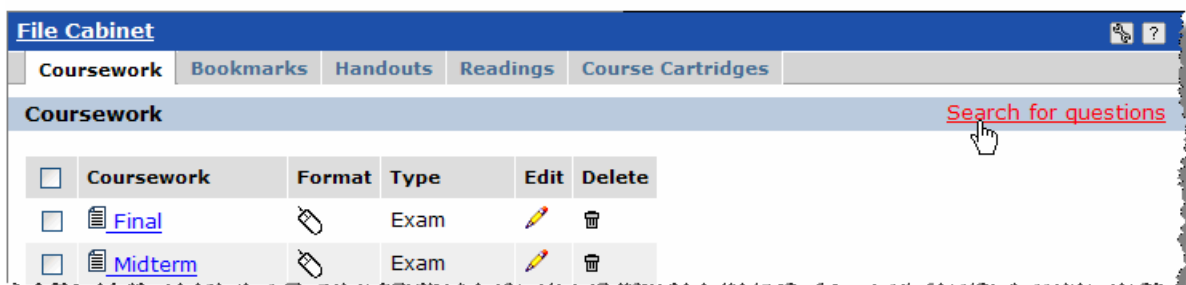
Searching for questions

If you want to check to see whether any of your saved assignments contain a particular question, use the **Search for questions** feature.

Note that you can also search for questions from within the Coursework portlet when you are in the process of importing.

To search for questions:

1   Display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518.

2   Click the **Search for questions** link, which is in the upper right portion of the screen.

The system displays a form.

3   Enter search criteria and/or select the question type from the drop-down list box. Note that the search criteria field is not case-sensitive.

4   If you want to search the answers as well as the question text, select the **Search questions and answers** radio button.

5   Click **Search**.

The system returns a list of items that match your search criteria. The initial results view includes the following information:

- The question text (but not the answer).
- The location of the question (with the name of the assignment listed first, then the section).
- The question type.

6   If you want more information, do one of the following:

- To see all the questions in the section, besides the one you just searched for, click the name of the section.

- In some cases, you can click the question text to see more details about the question, such as any feedback you set up for the question and a list of the available options (for multiple choice/answer questions). This view does not show the answer of the question; to see the answer, you must locate the question in Test Builder and open the question for editing there.

- To see a list of all the sections in the assignment, click the name of the assignment.

Deleting a question

To delete one or more questions from a saved assignment, use this procedure.

To delete one or more questions:

1 If you haven't already done so, display the question you want to delete using one of the following procedures:

- "Displaying a section's questions" on page 524
- "Searching for questions" on page 525

2 Using the checkboxes at the left, select the question(s) you want to delete.

3 Click **Delete Selected**.

The system displays a dialog asking if you are sure you want to delete the item(s).

4 Click **OK**.

Using the Bookmarks tab

The main screen of the Bookmarks tab displays the following:

- Any folders you have created for storing bookmarks (links).

- A list of bookmarks that you have saved (that are not organized into folders).

The list includes the name or URL of each bookmark, its description (if any), and the last date it was last modified. If the bookmark has not been modified, the **Modified** column shows the date it was created.

For help creating folders for your saved bookmarks, see "Working with folders" on page 535.

This section assumes that you are familiar with the general characteristics of bookmarks. For more details about readings, see Chapter 15, "Bookmarks."

Adding a bookmark

Use this procedure to create and store a bookmark in your File Cabinet.

To add a bookmark:

1 If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518, and click the **Bookmarks** tab.

2 Click the **Add a Bookmark** link, which is in the lower right corner of the screen.

The system displays a form that lets you add a bookmark.

3 Fill out the form as appropriate.

4 Click **Save**.

Modifying a bookmark

Use this procedure to modify a bookmark saved in your File Cabinet.

To modify a bookmark:

1 If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518, and click the Bookmarks tab.

2 Locate the bookmark that you want to modify and click the corresponding pencil icon.

The system displays the **File Cabinet - Manage Bookmarks View** screen.

3 Modify any of the fields as appropriate.

4 Click the **Save** button.

Deleting bookmarks

Use this procedure to delete one or more bookmarks saved in your File Cabinet.

To delete one or more bookmarks:

1 If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518, and click the Bookmarks tab.

2 Using the column at the left, select the item(s) that you want to delete.

3 Click **Delete Selected**.

The system displays a dialog asking if you are sure you want to delete the bookmarks.

4 Click **OK**.

Using the Handouts tab

The main screen of the Handouts tab displays a list of handouts you have saved and any folders you have created for storing handouts.

The initial view shows the following details about each handout:

- The size of the file.

- The date it was uploaded (not necessarily the date the file was saved to the File Cabinet).

- The file type.

Note that from this initial view, you can also display or download the handout.

For help creating folders into which you can organize your saved handouts, see "Working with folders" on page 535.

This section assumes that you are familiar with the general characteristics of handouts. For more details about handouts, see Chapter 24, "Handouts."

Adding a handout

Use this procedure to create a handout that will be stored in your File Cabinet.

To add a handout:

1   If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518, and click the Handouts tab.

2   Click the the link labeled **Upload Files to File Cabinet**.

    The system displays the **File Cabinet - Manage Handout View** screen.

3   Fill out the form as appropriate.

Modifying handouts

Use this procedure to modify a handout stored in your File Cabinet.

To modify a handout:

1   If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518, and click the Handouts tab.

2   Locate the handout you want to modify and click the corresponding pencil icon.

    The system displays the **File Cabinet - Manage Handout View** screen.

3   Modify any of the fields, as appropriate.

4   Click **Save**.

Deleting handouts

Use this procedure to delete one or more handouts from your File Cabinet.

To delete one or more handouts:

1   If you haven't already done so, display the File Cabinet, as described in , and click the **Handouts** tab.

2   Using the column at the left, select the item(s) that you want to delete.

3   Click **Delete Selected**.

    The system displays a dialog asking if you are sure you want to delete the handouts.

4   Click **OK**.

Using the Readings tab

The main screen of the Readings tab displays a list of saved readings and any folders you have created for storing readings.

The initial view shows the following details about each reading:

- The title of the reading.

- The author.

- The date it was last modified (not necessarily the date the file was saved in the File Cabinet).

For help creating folders into which you can organize your saved readings, see "Working with folders" on page 535.

This section assumes that you are familiar with the general characteristics of readings. For more details about readings, see Chapter 26, "Readings."

Adding a reading

Use this procedure to create a reading that will be stored in your File Cabinet.

To add a reading:

1   If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518, and click the **Readings** tab.

2   Click the link labeled **Add a New Reading**.

The system displays a form that lets you create a reading.

3   Fill out the form as appropriate.

4   Click **Save**.

Modifying a reading

Use this procedure to modify a reading saved in your File Cabinet.

To modify a reading:

1   If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518, and click the **Readings** tab.

2   Locate the reading that you want to modify and click the corresponding pencil icon.

The system displays the **File Cabinet - Manage Reading View** screen.

3   Modify any of the fields as appropriate.

4   Click the **Save** button.

Deleting readings

Use this procedure to delete one or more readings from your File Cabinet.

To delete one or more readings:

1   If you haven't already done so, display the File Cabinet, as described in , and click the Readings tab.

2   Using the column at the left, select the item(s) that you want to delete.

3   Click **Delete Selected**.

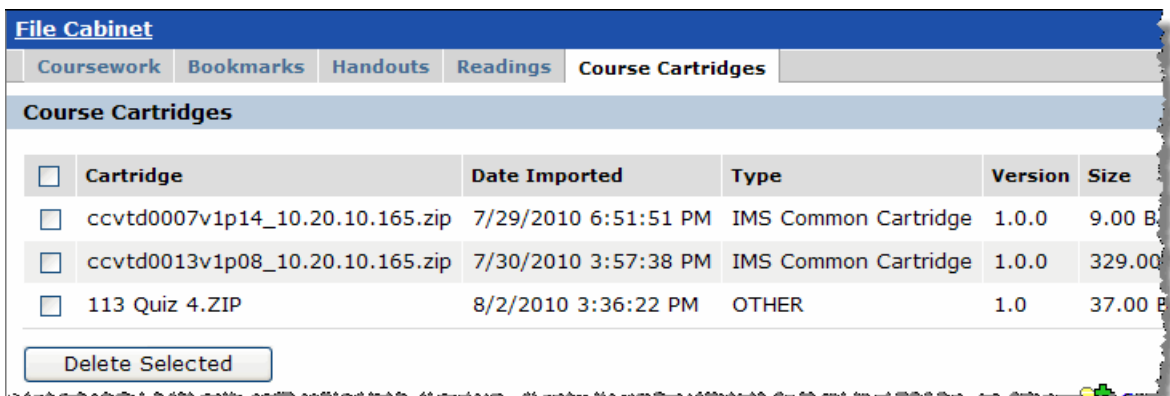   The system displays a dialog asking if you are sure you want to delete the readings.

4   Click **OK**.

Using the Course Cartridges tab

The main screen of the Course Cartridges tab displays a list of course cartridges that you uploaded using the CCI portlet, and any folders you have created for storing course cartridges.

The initial view shows the following details about each cartridge:

- The name of the cartridge.

- The date it was imported from the CCI portlet.

- The file type and version number.

- The cartridge's size.

If you need to delete a cartridge, you can do so using the trash-barrel icon, or by selecting one or more cartridges and clicking the **Delete Selected** button.

You can also create folders for organizing course cartridges, as described in

Working with folders

In any of the File Cabinet tabs, you can create folders for organizing the items saved in that tab. Note that there is only one level of folder organization. In other words, you cannot nest folders within folders.

Creating a folder

Use this procedure to create a folder for use in any of the File Cabinet tabs.

To create a folder:

1 If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518, and navigate to whichever tab you want to create a folder for.

2 Click the link labeled **Create a new folder**.

   The system displays a screen titled **File Cabinet - Add a Folder**.

3 Enter a name for the folder.

4 Click **Save**.

Renaming a folder

Use this procedure to rename a File Cabinet folder.

To rename a folder:

1 If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518, and navigate to whichever tab contains the folder you want to modify.

2 Locate the folder you want to rename and click the corresponding Edit icon, which looks like a folder with a pencil on it.

   The system displays a screen titled **File Cabinet - Edit Folder View**.

3 Modify the name as appropriate.

4 Click **Save**.

Deleting folders

Use this procedure to delete one or more folder(s) from any of the File Cabinet tabs. **Note that when you delete a folder, you also delete all of its contents**.

To delete one or more folders from a tab:

1   If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518, and navigate to whichever tab contains the folder you want to delete.

2   Using the checkboxes at the left, select the folder(s) you want to delete.

3   Click **Delete Selected**.

    The system displays a dialog asking if you are sure you want to proceed.

4   Click **OK**.

Moving items to a folder

Use this procedure to move items into a File Cabinet folder. Note that these steps are the same regardless of which tab you are working in.

To move items to a folder:

1   If you haven't already done so, display the File Cabinet, as described in "Navigating to the File Cabinet" on page 518, and navigate to the appropriate tab.

2   Locate the item(s) that you want. If appropriate, click the name of a folder to display its items.

3   Using the checkboxes at the left, select the item(s) you want to move.

4   At the bottom of the screen, locate the drop-down list labeled **Move Selected to:**

5   Using this drop-down list, select one of the following:

    •   The folder to which you want to move these items.
    •   The **Up one level** choice, which moves the item out of a folder and to the top level of the tab. (This option is displayed only if you are working within a folder.)

6   Click **Go**.

    The system moves the item(s) you selected.

Copying course materials

At times, you may want to copy portlets and their data from one course context to another. This chapter describes that process.

In this chapter:

Key concepts

At times, you may want to copy pages and portlets — and all the content they hold — from one course context to another. This may be useful if you'll be teaching multiple sections of a course in the same term, or if you teach the same course every semester. You copy materials using the Copy Course Materials portlet.

Only members of the Faculty and Administrators role have permission to copy courses. Additionally, unless you are a member of the Administrators role, you can only copy to and from your own course contexts. That is, only members of the Administrators role can copy one teacher's materials to another teacher's course context.

When you copy, the context that you copy from is called the **copied** context, or **source** context. The one you are copying to is called the **target** context.

Note that while the Copy Courses feature is often referred to as a portlet, it is not the type of portlet that you can add to a page. It exists in only one place and is always accessed through the **Copy Courses** link in the left-hand sidebar.

What can you copy?

The Copy Course Materials portlet copies the following:

- Materials that you have set up within the context of any course section.

- Any context-specific roles that have been created. Depending on the copying method you choose, the copy function can also copy the permissions associated with these roles.

You can copy any page and any portlet instance, though the exact specifics of how portlets are copied varies depending on what type of portlet it is. This section describes the specifics of how certain commonly used portlets are copied. For guidance on other portlets, refer to the text displayed on the Copy Course Materials screen.

Note that there is no scenario in which you can copy data about a particular student. The copy feature assumes that the target course has its own student roster, and any information about particular students is established only after you copy your materials over.

Attendance

When you copy an instance of the Attendance portlet, you copy its settings and permissions but none of its data. That is, the system copies the values you saved on the **Attendance - Notification and Attendance Method** and the ones saved on **Permissions** tab (which is accessible after you click the wrench icon).

Note that you can copy the Attendance portlet only in conjunction with the Coursework and Gradebook portlets. This means that you overwrite all three existing pages and portlets in the target context.

Bookmarks

When you copy an instance of the Bookmarks portlet, you copy any sets and any bookmarks that have been defined for it. You also copy its settings and permissions (the selections made after you click the wrench icon and go to the **Settings** and **Permissions** tabs).

Chat

When you copy an instance of the Chat portlet, you copy its permissions (the selections made after you click the wrench icon and go to the **Permissions** tabs). Chat data is not copied.

Coursemates

When you copy an instance of the Coursemates portlet, you copy its permissions (the selections made after you click the wrench icon and go to the **Permissions** tabs). Coursemates data is not copied.

Coursework

When you copy an instance of the Coursework portlet, the system copies all of your units and assignments, as well as the Coursework permissions settings (viewable when you click the wrench icon and then the **Permissions** tab).

Note that you can copy the Coursework portlet only in conjunction with the Attendance and Gradebook portlets. This means that you overwrite all three existing pages and portlets in the target context.

Custom Content

When you copy an instance of the Custom Content portlet, you copy any elements that have been created (text and images). You also copy its permissions (the selections made after you click the wrench icon and go to the **Permissions** tabs).

Recall that the Syllabus and About This Course portlets are both instance of the Custom Content portlet — so all of the above applies to them.

Forums

When you copy an instance of the Forums portlet, you copy its categories and its topics. You also copy its settings and permissions (the selections made after you click the wrench icon and go to the **Settings** and **Permissions** tabs).

You can also choose to copy posts by selecting one of the following options:

- The first post of any thread started by a faculty member.

- The first post of any thread (regardless of who started it).

Note that the option to copy posts is available only when you are copying "selected course content," not when you are copying "everything."

Gradebook

When you copy an instance of the Gradebook portlet, the system copies the configuration and settings of your Gradebook portlet. This includes specific evaluation that you have created, and your weighting configuration.

Note that you can copy the Gradebook portlet only in conjunction with the Attendance and Coursework portlets. This means that you overwrite all three existing pages and portlets in the target context.

Handouts

When you copy an instance of the Handouts portlet, you copy its sets and any handouts that have been uploaded. You also copy its settings and permissions (the selections made after you click the wrench icon and go to the **Settings** and **Permissions** tabs).

Note that the Downloadable Version portlet is an instance of the Handouts portlet, so all of the above applies to it.

Readings

When you copy an instance of the Readings portlet, you copy its sets and any readings that have been defined. You also copy its permissions (the selections make after you click the wrench icon and going to the **Permissions** tabs).

Other portlets

In general, with other portlets, only settings and permissions are copied, not data. For details, go to the Copy Courses Materials portlet and proceed as if you are copying selected content only. When you display the details of pages — including the portlets on each page — the system will display a brief explanation of how each portlet would be copied.

Navigating to the Copy Course Materials portlet

To display the Copy Course Materials portlet:

- In the **Quick Links** sidebar, click the **Copy Courses** link.

  The system displays the Copy Course Materials portlet. Note that there are two main methods of copying materials — copying everything and copying selected materials only. The remainder of this chapter details these options.

Copying everything

When you copy "everything" from one context to another, you delete all content in the target course and replace it with copied material from the source. Note the following:

- The material copied includes everything listed under "What can you copy?" except for the initials posts in Forums threads. These are not copied.

- The system copies all context-specific roles that have been defined, as well as the permissions associated with those roles (as configured on the **Permissions** tab within Context Manager).

- All existing content in the target context will be deleted. For example:

  - If the target context contains more pages than the copied context, the extra pages will be deleted.
  - If a page in the target context contains more portlets than the page being copied, the extra portlets will be deleted.
  - All pages and portlets with the same name as those in the source context will be replaced with copies from the source.

To copy everything:

1 After you've displayed the Copy Course Materials portlet, as described in "Navigating to the Copy Course Materials portlet" on page 541, choose the context that you want to copy from. In the area labeled **Step 1**, make the following selections:

   - Use the first drop-down list to select the term of the desired source context. In response, the system populates the second drop-down list with the course sections that exist in that term.
   - Use the second drop-down list to pick a source context — the course section that you want to copy from.

2 In the area of the screen labeled **Step 2**, select the target context. The list should include all contexts for course sections that you teach now or are scheduled to teach in the future. Note that you can select more than one course section by using the Shift or Control key.

3 In the area of the screen labeled **Step 3**, select the radio button labeled **Everything**.

4 Click **Copy**. If the Copy button is not enabled, it's because you made a mistake in one of the earlier steps — such as choosing the same target context as the one you are copying.

   The system generates a dialog asking whether you are sure you want to copy the selected material. Bear in mind that the target context you select will essentially be deleted and replaced with the materials you are copying.

5 Click **OK**.

   The system displays a **Please Wait** dialog, then a screen that indicates that the materials were copied successfully.

Copying selected materials

When you copy selected materials, you choose individual pages and portlets to copy.

This procedure also copies context-specific roles that have been established for the context. Whether or not that role's permissions are copied varies depending on whether the content relevant to the permission is also copied.

As part of this process, you have the choice of two different copying methods. Note that this choice is relevant only if the target context contains page(s) with the same name(s) as those in the source context. The two methods are:

- **Merge** — This method does not overwrite any content in the target context. For example, if the source context has a page with the same name as in the target, the two pages are combined, with the additional portlets from the source simply added to the target page. If a copied portlet instance has the same name as an existing one, the system adds the word **Imported** to the name of the newly copied instance.

- **Overwrite** — With this method, if the target context has one or more pages of the same name as those you have selected to copy, the target pages will be overwritten. Note that a page will be overwritten even if you select only one portlet to copy from the source page — even in this case, the target page will be completely overwritten with a new page that contains only that portlet.

To copy selected materials:

1 After you've displayed the Copy Course Materials portlet, as described in , choose the context that you want to copy from by making the following selections in the area labeled **Step 1**:

- Use the first drop-down list to select the term of the desired source context. In response, the system populates the second drop-down list with the course sections that exist in that term.
- Use the second drop-down list to pick a source context — the course section that you want to copy from.

2 In the area of the screen labeled **Step 2**, select the target context. The list should include all existing contexts for course sections that you teach now or are scheduled to teach in the future. Note that you can select more than one course section by using the Shift or Control keys.

3 In the area of the screen labeled **Step 3**, choose **Selected Course Content**.

4 In the **Conflicting Page Names** box, select one of the following:

- Merge
- Overwrite

Note that if you want to copy the Coursework, Gradebook and Attendance pages, you *must* select **Overwrite**. Content from these pages cannot be merged.

5 Do one or both of the following:

- Use the checkboxes at the left to select individual pages that you want to copy.
- If you want to copy just individual portlets on any page, click the name of any page to display a list of its contents, then select any specific portlets that you want to copy.

- If any subsections were defined for the source context, select any that you want to copy.

If you want to copy the Coursework, Gradebook and Attendance pages, you must first select Overwrite (in the **Conflicting Page Names** list at the right; this is described below, in step 7).

Note that if you select Overwrite, and if you have selected one portlet from a particular page, that page within the target context will be entirely overwritten. For example, suppose you decide to copy the Handouts portlet from the Main page, but nothing else from that page, as illustrated below.
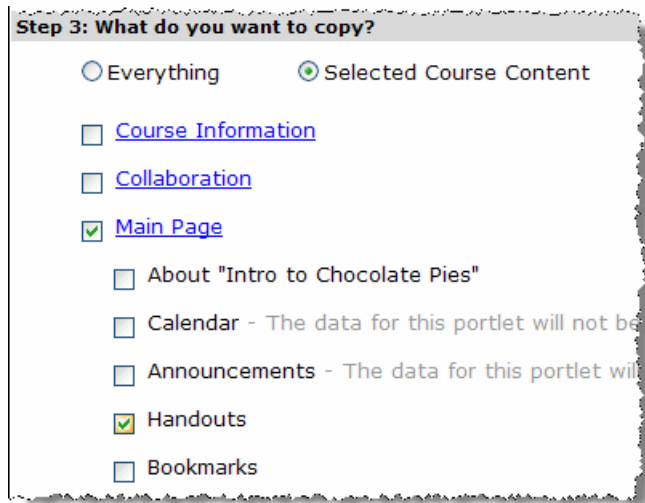
With the Overwrite option, the Main page in the target context will be entirely overwritten, and it will contain nothing but the imported Handouts portlet. If you simply want to *add* the Handouts portlet to the Main page in the target context, go back to step 4 and select **Merge**.

6 If you are copying an instance of the Forums portlet, make the appropriate selection in the **Forums** box on the right-hand side of the screen.

7 Click **Copy**.

The system generates a dialog asking whether you are sure you want to copy the selected material.

8 Click **OK**.

The system displays a **Please Wait** dialog, then a screen that indicates that the materials were copied successfully.

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Creating a course cartridge

This chapter describes how to create a course cartridge from content in your course.

In this chapter:

Key concepts

This release introduces an export feature that lets you create a course cartridge using content from a course section. Cartridges created this way have a `.imscc` extension and are compliant with the IMS Global Learning Consortium's Common Cartridge 1.1 standard.

Content that can be exported

The following types of content can be exported:

- Bookmarks
- Coursework assignments
- Custom Content
- Forums topics
- Handouts

With most types of content that can be exported, the system does not necessarily export every setting that the item might be configured with. The process generally includes only those features that are compatible with Common Cartridge v1.1 — but if you want to understand what the differences are, see the sections below for more details on each content type.

Bookmarks

You can export the label and URL of a bookmark.

You *cannot* export the description or activation settings of a bookmark, nor can you export sets.

Coursework assignments

You can export online assignments, their point values, their sections, and most of their questions, though not ordering or matching questions.

You *cannot* export some of the values associated with online assignments, such as their instructions, descriptions, due dates, passwords, and similar settings. Note that with an assignment's sections, only the section name (not its description and not its type) are saved.

Basic assignments and uploaded assignments cannot be exported.

Custom Content

You can export custom content. The content of each Custom Content portlet instance is treated as a bookmark.

Forums topics

You can export Forums topics (their names and their descriptions).

You *cannot* export Forums categories, posts, nor any Forums settings.

Handouts

You can export a handout.

You *cannot* export the description or activation settings of a handout, nor can you export sets.

Exporting content

To export a course's materials, you use the Context Manager.

If you need to export content for use in a different e-Racer course section, you should use the Copy Course Materials portlet, not the course export feature, because Copy Course Materials allows more data to be transferred. That is, while the new export feature focuses on data specified by the Common Cartridge v1.1 standard, the Copy Course Materials also copies data that pertains to the many extra features that exist in e-Racer and JICS.

To export a course's content:

1 Log in as a faculty member or administrator and navigate to the course section whose content you want to export.

2 Select the **Context Manager** link.

The Context Manager displays.

3 Select **Export**.
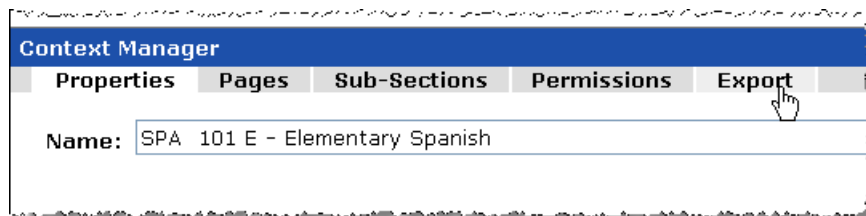
The system displays the **Export** tab.

The Export tab includes a few helpful links for getting more information:
- *Clicking "types of content" displays a summary of the content that will be exported.*
- *Clicking "IMS compatible Course Cartridge" displays a page maintained by the IMS Global Learning Consortium about the CC v1.1 specification.*
- *Clicking "Course Copy feature" displays the Copy Course Materials portlet.*

4   To start the export, select the link that says **Export and download the Course Cartridge**.
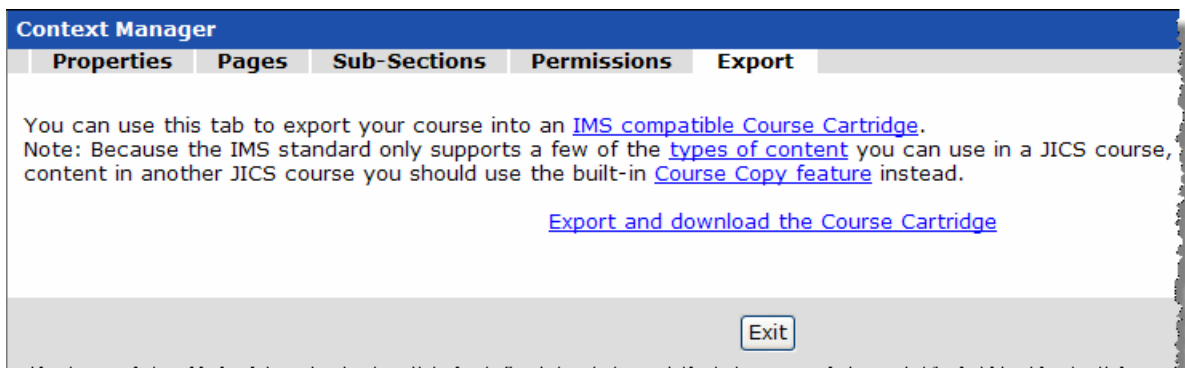
5   Depending on which browser you are using, the browser may display a dialog that asks whether you want to save or open the file. Choose to save the file.

6   If you are using Internet Explorer, the system generates a dialog that lets you rename the cartridge. If appropriate, modify the name suggested by the system and click **Save**.

The system saves a `.imscc` file to your local download folder. The `.imscc` file contains all the exportable content from the course.

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Importing from course cartridges

This chapter describes how to use the Course Content Import portlet (or CCI portlet), which lets you import material from IMS Common Cartridge v1.0 or v1.1 files into your course context.

In this chapter:

Key concepts

The CCI portlet lets you integrate course cartridge materials into other portlets in your course. You can also use the CCI portlet to simply browse the contents of a cartridge.

You can work with IMS Common Cartridge v1.1 and v1.0 files. Other formats are not supported at this time.

As a point of reference, v1.1 files have a `.imscc` extension and v1.0 files have a `.zip` extension. However, note that not all `.zip` files are supported by the CCI portlet, because not all `.zip` files are compliant with the v1.0 standard.

As a user of the CCI portlet, you should see no differences at all between how v1.1 and v1.0 files are handled, except that a v1.1 file may contain a learning tool. (The learning-tool content type was not supported in v1.0.) For help integrating a learning tool from a course cartridge into your course context, see "Integrating content into another portlet" on page 558.

No default location

The default template for course contexts does not include an instance of the CCI portlet, so you may need to add the portlet to a page. However, before you add an instance of the portlet to your site, note the following:

- If you want to import content directly from the CCI portlet to a portlet within your course context (this is probably the most common use of the portlet), then the CCI portlet must be placed somewhere within that course context.

- If you do *not* want students to be able to view the course materials you upload to your CCI portlet instance, you should place it on a page that students do not have access to. Note that the CCI portlet instance has a browse view that lets users see password-protected items.

Available functions

The CCI portlet can be used to do either of the following:

- Integrate material into other portlets
- Host content that users can browse

Integrate material into other portlets

The CCI portlet lets you integrate content into any of the following portlet types:

- Announcements
- Bookmarks
- Coursework
- File Cabinet
- Forums

- Handouts

- Learning Tools

Integrating material into your portlet instances is a two-part process that involves bringing the material into a CCI portlet instance, then moving it to its destination, as follows:

A "Bringing material into a CCI portlet instance" on page 554

B "Integrating content into another portlet" on page 558

Host content that users can browse

You can set up a CCI portlet instance to be a place where other users browse the material of a course cartridge. To do this, you complete the following tasks:

A "Bringing material into a CCI portlet instance" on page 554

B "Managing the display of items in the portlet" on page 562 (optional)

Each portlet instance is unique

The material loaded into each CCI portlet instance is specific to that instance alone. So if you load a course cartridge into a particular CCI portlet instance, the cartridge is available *only* in that instance, and not in any others.

Similarly, the ability of a user to manage content within CCI is specific to each instance of the portlet. There are no global permissions (global portlet operations) for the CCI portlet.

Every instance of the CCI portlet will always let you import from your File Cabinet.

About protected cartridges and content

The CCI portlet supports the use both of password-protected cartridges and password-protected items (individual pieces of content).

If you upload cartridges that contain individually password-protected items, you may want to review this section for details on how students will interact with these items, and on other characteristics of this feature.

When items are integrated another portlet

When you import a password-protected item into a portlet available to students, in the student view the item will be marked with a padlock.
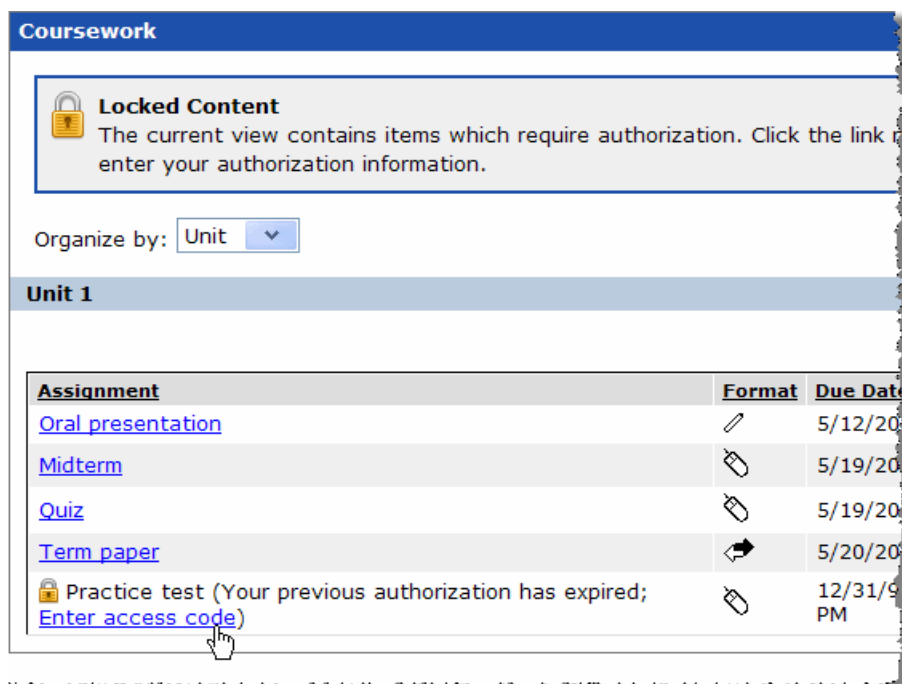
In the student view, the system will also display a link that a student can use to enter an access code. When the student clicks this link, the system displays a dialog box for entering the password.
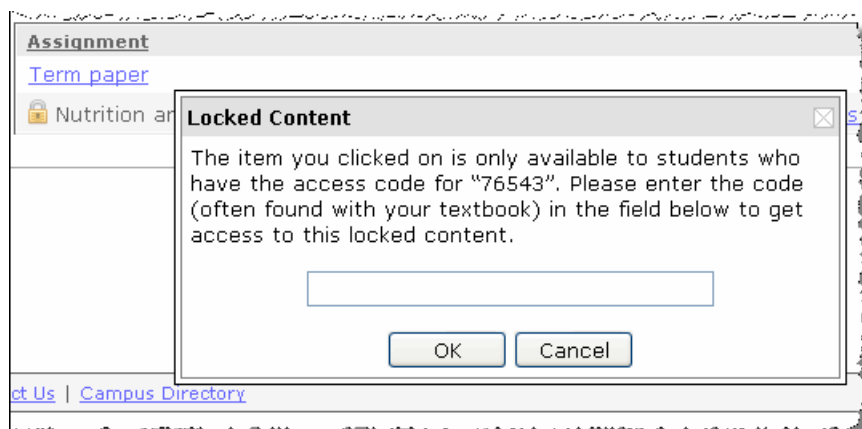
In your view, generally the item will *not* be marked with a padlock icon. However, if you export the item to another location where you do not have administrative rights (which is possible only in certain circumstances), the system will prompt you to enter a password to view the item.

When items are loaded in the browse view

When you bring a cartridge into a CCI portlet instance, any password-protected items will be viewable in the portlet's browse view (without a password). This is because there is a general assumption that the person with access to the browse view is a faculty member.

Protected items cannot be saved to the File Cabinet

In addition, password-protected items cannot be saved to the File Cabinet. So, for example, if a password-protected item is imported to the Coursework portlet and you later use the Coursework portlet to modify the item, in these cases the system replaces the **Save to File Cabinet** link with messaging that indicates the item cannot be saved to the File Cabinet.

Bringing material into a CCI portlet instance

Bringing material into a CCI portlet instance is the first step in the process of integrating the material into another portlet, such as Coursework or Handouts. You might also want to bring material into a CCI portlet instance so that other users can browse it from within the CCI instance.

The primary way of bringing material into the CCI portlet instance is to upload the course cartridge from outside the portal (from a folder on your desktop, for example). When you do this, you have the option of saving the course cartridge to your File Cabinet. If you do this, then later you can load the cartridge directly from the File Cabinet.

This section describes both loading processes — loading from outside the portal and loading from the File Cabinet.

Note also that an instance of the CCI portlet can only hold the contents of *one* course cartridge at a time. So if you have added one cartridge to the portlet and want to add another, you must remove the first before trying to work with the second.

Uploading a cartridge from outside the portal

The primary way of bringing material into the CCI portlet instance is to upload the course cartridge file from your own computer or from elsewhere on your network.

To upload a cartridge from outside the portal:

1   Log in to the portal and navigate to the appropriate CCI portlet instance.

2   Do one of the following:

   •   If the portlet instance already contains material from a course cartridge, as illustrated in the figure below, you will need to remove the material before proceeding. For details on how to do this, see "Removing content from a CCI portlet instance" on page 564, then proceed to step 3.
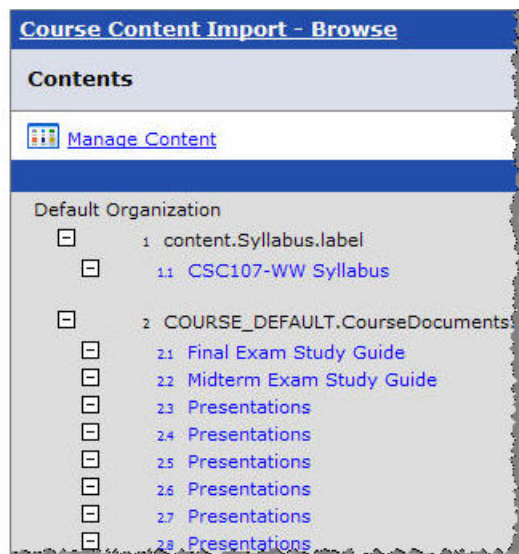
- If the portlet instance does not currently contain any content, the instance will display a dialog stating as much, as shown below. In this case, skip ahead to step 3.

3   In the CCI portlet, click **Browse...** or **Choose File**. (The button label will vary depending on your browser.)

Your browser opens a dialog box that lets you navigate to the appropriate file.

4   Select the correct file and close the dialog by clicking **Open**.

The dialog box closes, and the system updates the screen with the name of the file you chose.

5   If desired, select the checkbox labeled **Save this cartridge to your File Cabinet**. Doing this means that in the future you can load the material directly from your File Cabinet, and you can use the File Cabinet to view basic details about the cartridge.

6   Click **Upload**.

If this cartridge is password-protected, the system displays a dialog box asking for an authorization code. In this case, enter the appropriate password and click **OK**. Note that the dialog box will not hide or obscure your password as you type it.
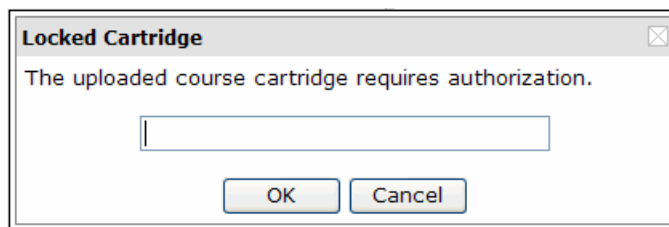
The portlet instance displays a dialog stating that it is loading the course cartridge. Do not use the portal while this process is taking place.
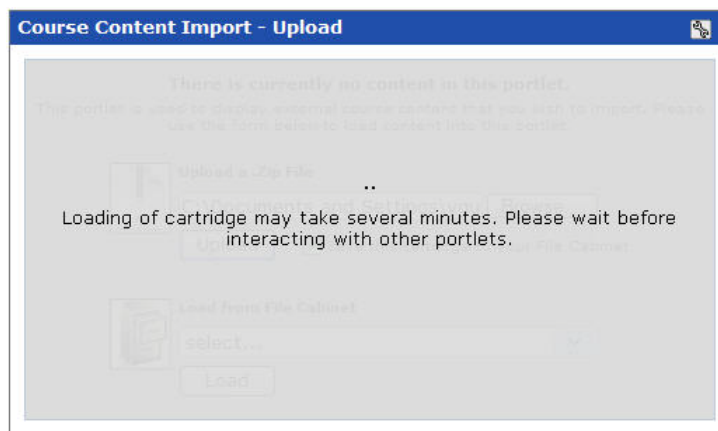
When the process is complete, the portlet instance displays the material you've uploaded.

- At this point, you can do either of the following:
  - Transfer the course cartridge material to other portlets, as described in "Integrating content into another portlet" on page 558.

- Restrict certain items from being viewable in this instance of the CCI portlet, see "Managing the display of items in the portlet" on page 562. By default, the content is viewable by anyone who has access to the page hosting the CCI portlet instance.

Loading a cartridge from the File Cabinet

If you have previously saved a course cartridge to the File Cabinet, as described in "Bringing material into a CCI portlet instance" on page 554, and you want to load it again into the CCI portlet, use the procedure below.

To load a cartridge from the File Cabinet:

1 Log in to the portal and navigate to the appropriate CCI portlet instance.

2 Do one of the following:

- If the portlet instance already contains material from a course cartridge, you will need to remove the material before proceeding. For details, see "Removing content from a CCI portlet instance" on page 564, then proceed to step 3.
- If the portlet instance does not currently contain any content, the instance will display a dialog stating as much, as shown below. In this case, skip ahead to step 3.

3 In the **Load from File Cabinet** area of the screen, use the drop-down list to select the file you want to upload.

4 Click **Load**.

The portlet instance displays a dialog stating that it is loading the course cartridge. Do not use the portal while this process is taking place.

When the process is complete, the portlet instance displays the material you've loaded.

At this point, you can do either of the following:

- Transfer the course cartridge material to other portlets, as described in "Integrating content into another portlet" on page 558.
- Restrict certain items from being viewable in this instance of the CCI portlet, see "Managing the display of items in the portlet" on page 562. By default, the content is viewable by anyone who has access to the page hosting the CCI portlet instance.

Understanding the administrative screen

For certain procedures, you display a screen titled **Admin All Content**. This screen shows all items that exist in the cartridge and lets you work with them.
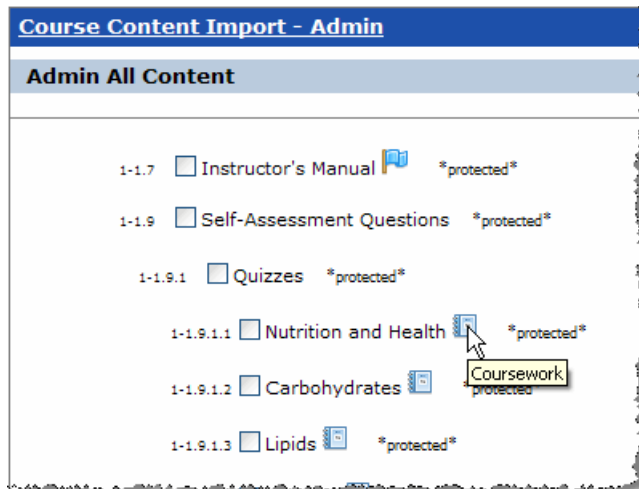
The system uses the following series of icons to identify each type of item. This might be useful to you for when you are integrating items into other portlets, or when you are managing how these items display. The icons are defined as follows:

 — Announcements

 — Bookmarks

 — Coursework

 — Forums

 — Handouts

 — Learning Tools

If you forget what any particular icon represents, you can run your cursor over it, and the system will display a pop-up hint.

Integrating content into another portlet

Once you have loaded a cartridge, as described in "Bringing material into a CCI portlet instance" on page 554, you can integrate it into another portlet instance within your course context or another location.

To integrate content into another portlet instance:

1   Log in to the portal and navigate to the appropriate CCI portlet instance.

2   Click the **Manage Content** link.

The system displays the **Admin All Content** screen, which lists all of the individual items that you can integrate into other portlets.
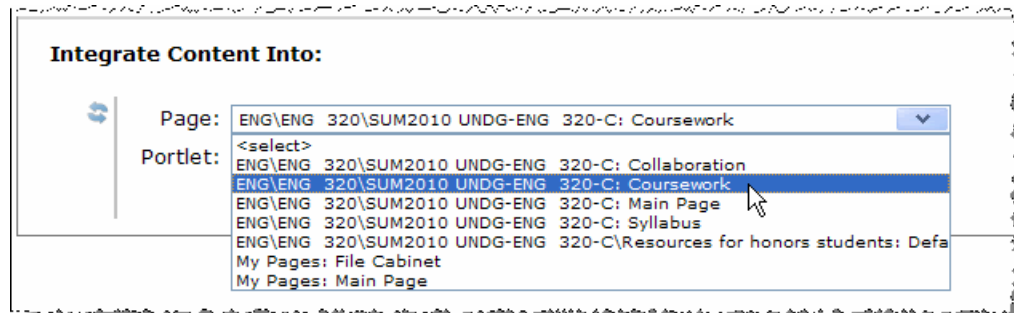
(For help understanding the icons, see "Understanding the administrative screen" on page 557, or just run your cursor over the icon to display a hint.)
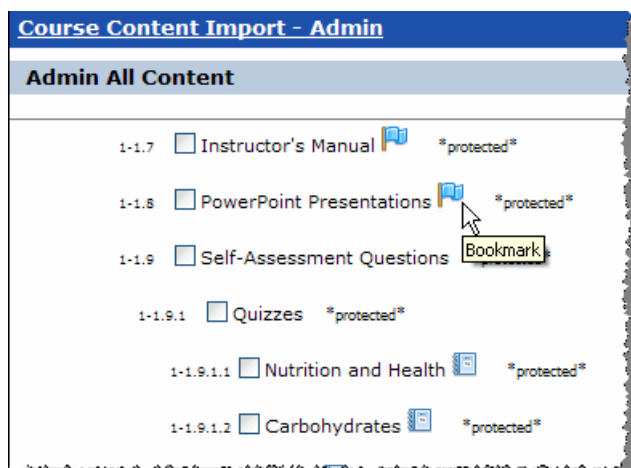
If any of the individual items are password-protected, they are labeled `*protected*`.

3   Select the items that you want to integrate into a particular portlet. You will be allowed to transfer items to only one portlet instance at a time — so don't select items that are supposed to go to different places.

4   In the **Integrate Content Into:** area of the screen, make the following selections:

a   Use the **Page** drop-down list to choose the page you want to import to. Generally, you will see the following choices:

— Each page in the current course context. Choices are displayed in the following format: *Department \ Course \ Course Section: Page*.

— Each page in your My Pages context. For example: **My Pages: File Cabinet**.

If the CCI portlet instance happens to be located outside of your course context, you will see different destinations.

b   Use the **Portlet** drop-down list to choose the portlet instance you want to integrate content into.

If you are integrating into an instance of the Bookmarks or Handouts portlet, the system displays a **Header** or **Folder** drop-down list. This list describes the sets or categories that exist in the portlet instance you chose. Choose the area that the content belongs in. If you select **[new header]**, you'll create a new set or category to put the item into.

If you are integrating the content into a portlet in your File Cabinet page, you will see choices labeled **{root}** and **[new folder]**. If you select **{root}**, the item will go to the top level of items in the File Cabinet tab you selected. If you select **[new folder]**, you'll create a new folder to put the item into.

If you want to integrate into a Learning Tools portlet instance, note that it must not be currently hosting tool — the Learning Tools portlet must be empty. If the portlet is not empty, it will not show up in the drop-down list.

To view a demo of how to configure and use the Learning Tools portlet, log in MyJenzabar.net and choose **Support** > **e-Racer** > **e-Racer V1.6 Resources**.

After you select an empty Learning Tools portlet, the system adds a **Tool** drop-down list to the screen. In this list, choose **New tool**.

Integrate Content Into:

	Page:	ENG\ENG 307\2007 10-ENG 307-B: Main Page
	Portlet:	Learning Tools
	Header:	<select>
		<select>
		[New tool]

If you need help working with the Learning Tools portlet, note that the Jenzabar support site (http://www.myjenzabar.net/ics/) will be hosting a recorded demo on how to use the portlet. If you do not have access to MyJenzabar, talk to your system administrator about getting access to this demo.)

Password-protected items cannot be integrated into the File Cabinet.
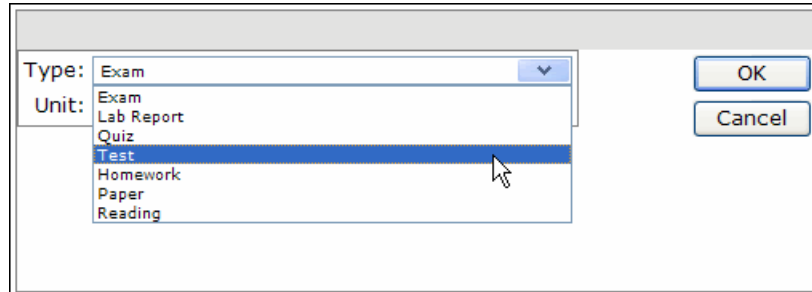
5   Click **Process**.

6   If you selected **[new header]** or **[new folder]**, the system displays a dialog asking you to name the new set or category. Enter the name and click **Create**.

Create new folder?

Review materials

[Create]   [Cancel]

7   If you are integrating content into the Coursework portlet, the system displays a dialog asking you to select a Unit and Type that describes the item. Make these selections and click **OK**.

The system displays a status bar as it processes your request. When the process is complete, the system displays a dialog box that says **Deselect selected items?**

8   Do one of the following:

- If you want to keep the items selected so that you can integrate them into another portlet instance, click **No**.
- If you are done working with the items you selected, click **Yes**.

The system again displays the CCI portlet instance.

9   Navigate to the portlet instance to which you just integrated content and make sure that it displays as you intended.

Managing the display of items in the portlet

Once you have uploaded material into the CCI portlet, as described in "Bringing material into a CCI portlet instance" on page 554, the material is available for browsing to anyone who has permission to display the page.

Assuming you are not ready to remove the content, you might want to hide items, as described in the procedure below. This procedure also explains how to display an item you previously marked as hidden, and how to rename an item.

As an alternative to hiding specific items, you may want to review the permissions for the page and restrict access to it. You can also simply remove the content, as described in "Removing content from a CCI portlet instance" on page 564.

Note that the browse view of the CCI portlet allows users to display password-protected items without entering a password — so these items might be ones that you want to hide, depending on which roles have the ability to display the page.

To manage the display of items in the CCI portlet instance:

1   Log in to the portal, and display the appropriate CCI portlet instance.

2   Click the **Manage Content** link.

   The system displays the **Admin All Content** screen, which lists all of the individual items that are part of the course cartridge. For help understanding the icons on the screen, see "Understanding the administrative screen" on page 557, or just run your cursor over the icon to display a pop-up hint.

3   If you want to rename any item, complete the following steps:

   a   Click the name of the item.

   The system displays a pop-up menu with four choices.

   b   Select **Retitle**.
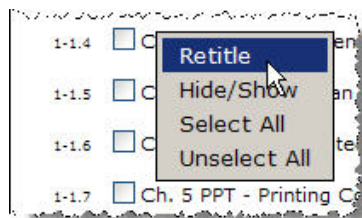
   The system makes the title modifiable, and updates the screen to include **Save**, **Cancel**, and **Reset** buttons.

   c   Modify the name as necessary and click **Save**.

4   If you want to hide any item, complete the following steps:

   a   Click the name of the item.

   The system displays a pop-up menu with four choices.
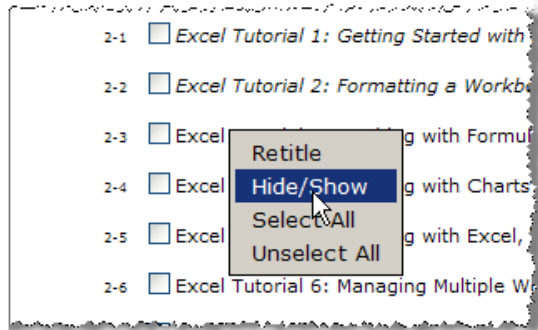
b   Select **Hide/Show**.

The system updates the screen, labeling it as *hidden*.

5   If you want to display an item that you previous marked as hidden:

a   Click the name of the item.

The system displays a pop-up menu with four choices.

b   Select **Hide/Show**.

The system updates the screen, and the item is no longer labeled *hidden*.

6   Navigate back to the main view of the portlet instance to make sure it now displays as you intended.

Removing content from a CCI portlet instance

An instance of the CCI portlet can hold material from only one course cartridge at a time. If you want to remove content from an instance of the CCI portlet, use the procedure below.

To remove content from a CCI portlet instance:

1   Navigate to the CCI portlet instance and click the **Manage Content** link.

The system displays the **Course Cartridge Import - Admin** screen.

2   Click the **Remove Cartridge** link, which is at the bottom right corner of the screen.

The system displays a dialog stating that removing the cartridge cannot be undone.

3   Click **OK**.

The system again displays the main screen of the portlet instance, this time with a dialog stating that it contains no content.

Managing permissions

If appropriate, you can give other roles the ability to manage an instance of the CCI portlet. Users need management privileges in order to access to the **Manage Content** link, which is necessary for completing most of the procedures described in this chapter.

To give a role management privileges:

1   Navigate to the appropriate CCI portlet instance and click the wrench icon.

The system displays the **Customize portlet *Course Content Import*** screen.

2   Click the **Permissions** tab.

The system displays the **Define Permissions** tab, which lists all the roles defined in the system.

3   Make sure that every role responsible for managing this instance of the CCI portlet has the **Can Manage Content** permission.

4   Click **Save**.

Part 6:
Pages, sub-sections, and roles

This section describes how to manage roles and pages within a context, and related tasks.

In this section:

34

Managing the layout of a context

This chapter explains how to refine the layout of your course context, or any other context that you might have permission to manage, by adding and modifying sub-sections, pages, and portlets.

In this chapter:

- Working with pages
- Working with sub-sections
- Working with sidebars

Working with pages

You may want to add pages to your course context, or any of its sub-sections. You may also need to rename pages, delete them, and so forth. This section covers all these tasks, as follows:

- Creating a page
- Renaming a page
- Deleting a page
- Arranging portlet instances
- Deleting a page

Creating a page

If you want to create a page, follow this procedure.
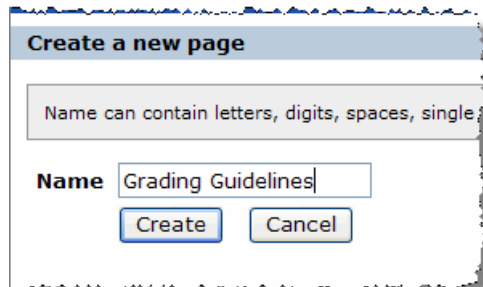
To create a page:

1   Log in to the portal and navigate to the appropriate course section or sub-section.

2   In the sidebar, click the **Add a Page** link.
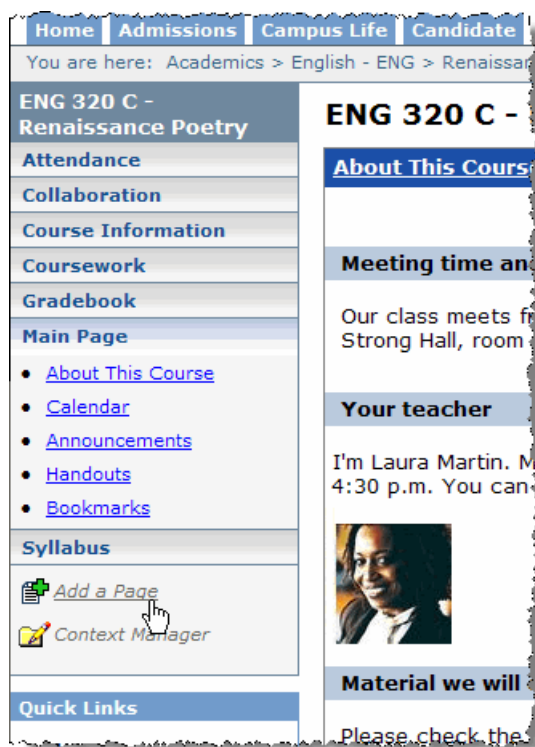
The system displays the **Create a new page** screen.
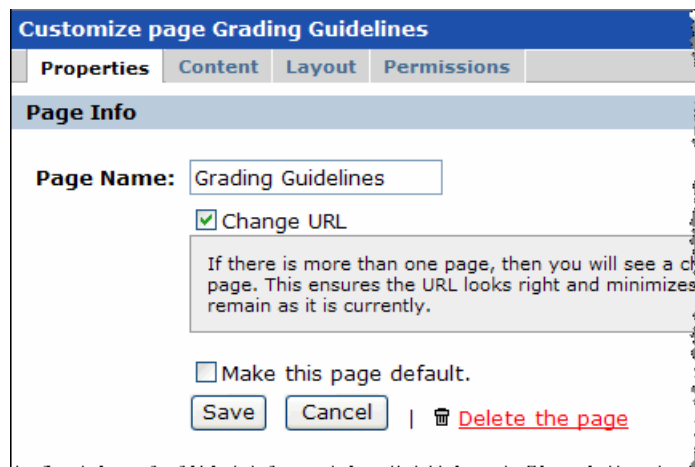
3 In the **Name** field, enter a name for the page. This name will become part of the URL. It will be displayed in the sidebar, in breadcrumbs, and as a title at the top of the page (unless this page is the default page for the context). For these reasons, you should choose a meaningful name.

4 Click **Create**.

The system creates your page and displays the **Customize page** *name* screen, which lets you add content to the page and take other actions.

If you want to take time now to add portlet instances to the page or specify the layout of the page, you can do this using the **Content** and **Layout** tabs.

When you navigate back to the parent tab or sidebar, you will see your new page in the sidebar.
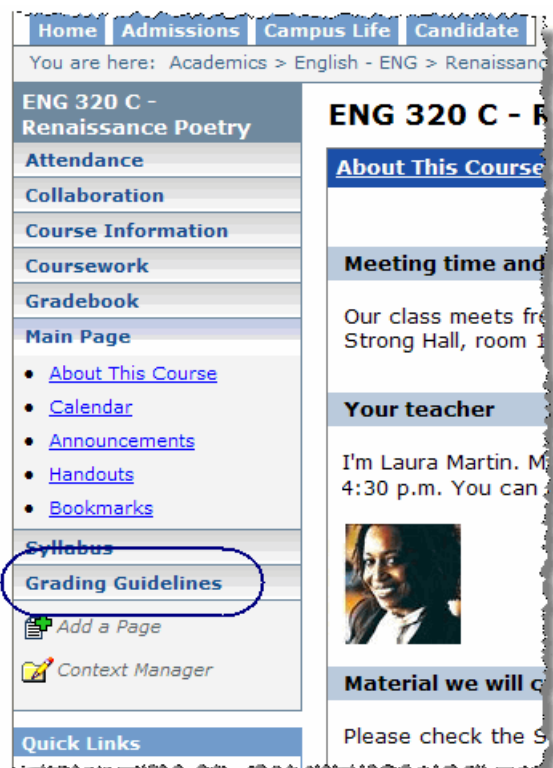
Renaming a page

If you want to create a page, follow this procedure.

To rename a page:

1   Log in to the portal and navigate to the page you want to rename.

2   Click **Edit page**.

The system displays the **Customize page name** screen, with the **Properties** tab displayed.

3   In the **Page Name** field, enter the new name.

4   If you want the URL to reflect the new name, click the **Change URL** checkbox. Note that if you change the URL, existing bookmarks will no longer work.

5   Click **Save**.

Making a page the default

If you want to make a page the default for its course context or sub-section, use this procedure. When you do this, when a user first navigates to the course context (or sub-section), this is the page that is first displayed.

To make a page the default for its context:

1   Log in to the portal and navigate to the page that you want to make a default page.

2   Click **Edit Page**.

    The system displays the **Customize page name** screen, with the **Properties** tab displayed.

3   Select the checkbox labeled **Make this page the default**.

4   Click **Save**.

Working with portlet instances

In order for page to be useful, you have to add content — one or more portlets — to it. When you add a portlet to a page, you create a portlet instance. This section describes how to add, rename, and delete portlet instances.

Creating a portlet instance

Use this procedure to place portlets on a page. Once a portlet is added to a page, it is considered a portlet instance. Note that there can be no more than 10 portlet instances on a page.

To create a portlet instance:

1   Log in to the portal and navigate to the page where you want the portlet (or portlets) to be displayed.

2   Click **Edit page**.

    The system displays the **Customize page name** screen.

3   Select the **Content** tab.

    The system displays a screen that lists all existing portlet instances (if any).

4   Click **Add a portlet**.
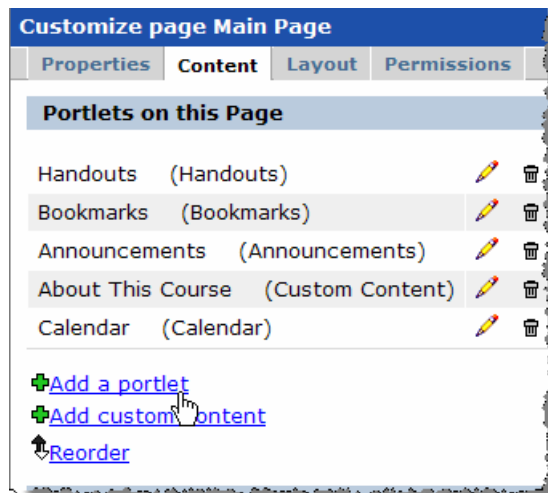
The system does one of the following:

- Displays a list of portlets. This list includes all the portlets that are available to be added. Continue to step 5.

- Displays a dialog stating that there are no portlets available to be added to this tab. This can occur because of the way the tab is configured. Contact the administrator of your portal for assistance.

- Displays a dialog stating that the maximum number of portlet instances is already displayed on the page. In this case, you either must delete one or more of the existing portlets instances, or choose a different page to add content to.

5   Use the checkboxes to select the portlet(s) that you want to add to the page.

If you do not see the name of the portlet you want to add, it may be because of the way that the tab is configured. Contact the administrator of your portal for assistance.

For each portlet you select, the system makes the name of the portlet editable.
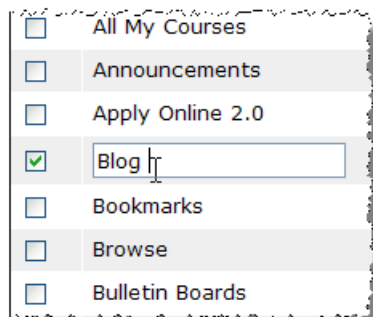
6   If appropriate, change the name of any portlet instance from the default name. For example, you may want to choose a name that's more tailored to the way you're going to use the portlet.

Note that the name will also become part of the URL to this portlet instance, and once you create the portlet instance, you will not be able to change the URL (even if you change the name).

☐	All My Courses
☐	Announcements
☐	Apply Online 2.0
☑	Live from the festival
☐	Bookmarks
☐	Browse
☐	Bulletin Boards
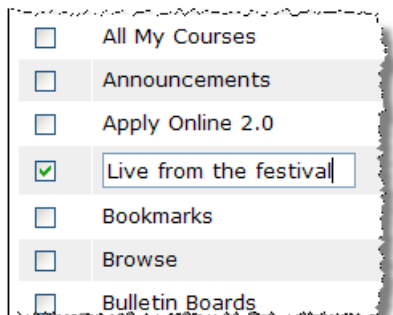
Note that the names of the portlet instances are displayed at the top of the portlet instance, in the sidebar, and in breadcrumbs.

7   Scroll to the bottom of the screen and click **Add Portlets to page**.

Note that if you are attempting to add too many portlet instances to a page, the system will display a dialog stating as much.

Otherwise, the system displays the main **Content** tab, which lists all portlet instances on the page, along with a dialog stating "Your new portlet was created successfully."

Your new portlet instance(s) are listed on this tab. If you changed the name of any portlet instance, the name you chose is listed first, and the portlet type is listed in parentheses.

Customize page Main Page

| Properties | **Content** | Layout | Permissions |

Your new portlet was created successfully

Portlets on this Page

Announcements	(Announcements)	✏	🗑
Handouts	(Handouts)	✏	🗑
Bookmarks	(Bookmarks)	✏	🗑
About This Course	(Custom Content)	✏	🗑
Calendar	(Calendar)	✏	🗑
Live from the festival	(Blog)	✏	🗑

➕Add a portlet
➕Add custom content
⬆Reorder
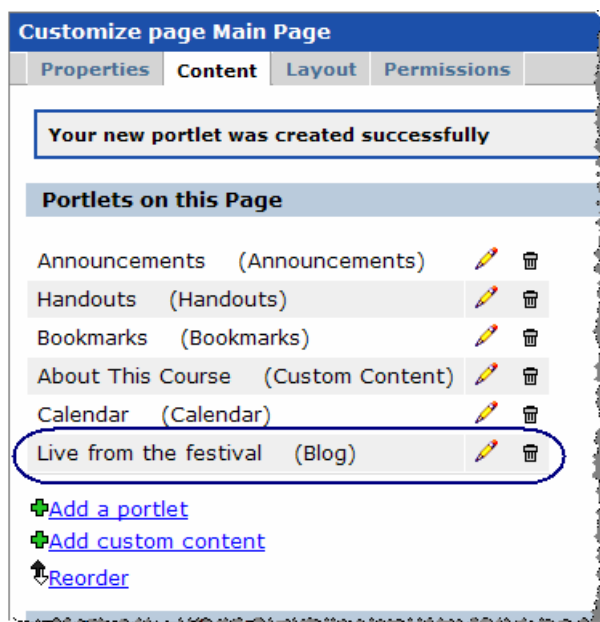
8   To exist the **Customize page name** screen, scroll to the bottom of the screen and click **Exit**.

Renaming a portlet instance

Use this procedure to rename a portlet instance. Note that the names of the portlet instances are displayed not only at the top of the portlet, but also in the sidebar and in breadcrumbs, so you should choose a meaningful name.

To rename a portlet instance:

1   Log in to the portal nd navigate to the page hosting the portlet instance you want to rename.

2   Click **Edit page**.

   The system displays the **Customize page name** screen.

3   Select the **Content** tab.

   The system displays the **Content** screen, which lists all the portlet instances on the page.

4   Locate the portlet instance you want to rename and click the corresponding pencil icon.

   The system displays a screen that lets you rename the portlet instance.

5   In the **Name** field, enter the new name. Note that changing the name will not change the URL.

6   Click **Rename**.

   The system displays a dialog stating that you have successfully changed the name of the portlet instance.

Deleting a portlet instance

Use this procedure to delete a portlet instance. Note that most portlet instances contain content unique to that instance, and you delete the instance, you also delete the content.

To delete a portlet instance:

1   Log in to the portal nd navigate to the page hosting the portlet instance you want to delete.

2   Click **Edit page**.

   The system displays the **Customize page name** screen.

3   Select the **Content** tab.

   The system displays the **Content** screen, which lists all the portlet instances on the page.

4   Locate the portlet instance you want to rename and click the corresponding trash barrel icon.

   The system displays a displays a dialog asking whether you are sure you want to delete the portlet instance.

When you delete a portlet instance, you delete all content created that is specific to the instance, plus all shortcuts to the instance. So do not proceed unless you are certain you don't need this content.

5   If you are sure you want to delete the instance, click **OK**.

Modifying a page's layout

When you modify a page's layout, you have the ability to make two types of changes:

- Modifying the column layout
- Arranging portlet instances

Modifying the column layout

Each page uses one of several preconfigured column layouts. These preconfigured layouts let you choose the number and relative size of the columns the page will use.

To modify a page's column layout:

1   Log in to the portal and navigate to the page whose layout you want to modify.

2   Click **Edit Page**.

The system displays the **Customize page name** screen, with the **Properties** tab displayed.

3   Click **Layout**.

The **Layout** tab is displayed.

4   Use the **Choose a Column Layout** portion of the screen to select a layout.

5   Click **Save**.

Arranging portlet instances

When you arrange portlet instances, you can do either of the following:

- Move a portlet instance up or down on the page.
- If your layout includes more than one column, you can move portlet instances from left to right.

To arrange portlet instances:

1   Log in to the portal and navigate to the page whose portlets you want to arrange.

2   Click **Edit Page**.

The system displays the **Customize page name** screen, with the **Properties** tab displayed.

3   Click **Layout**.

The **Layout** tab is displayed.

4   Use the **Arrange Portlets** portion of the screen to specify the placement of the portlet instances on the page.

To move any given portlet instance:

    a   Select the portlet name.

    b   Do one of the following:

       •   To move the portlet to a different column, click the column that you want to move the portlet to.

       •   To move the column up or down, use the up and down arrows.

5   Click **Save**.

Deleting a page

If you need to delete a page, use this procedure. Note that if a page is the default for its parent tab or sub-section, it cannot be deleted. Further, when you delete a page, you also delete all portlet instances on that page, and content that they contain.

To delete a page:

1   Log in to the portal and navigate to the page you want to delete.

2   Click **Edit Page**.

The system displays the **Customize page name** screen, with the **Properties** tab displayed.

⚠️   When you delete a page, you delete all portlet instances and their content. So do not proceed unless you are certain you don't need this content.

3   If you are sure you want to delete the page, click the **Delete the page**.

Working with sub-sections

A sub-section is like a subset of a tab (or a subset of another sub-section). It is essentially a collection of one or more pages. You might create a sub-section if you want to group pages that deal with similar topics or which are targeted to a specific role. For example, if you had a few pages intended just for other faculty members, you might want to set up a sub-section intended just for them. You can also configure a separate set of permissions for a sub-section, so that only certain roles are allowed to display it.

By default, sub-sections are represented in the sidebar as folder icons, though if appropriate you can hide the icons (which also serve as links).

This section explains the following tasks:

- Creating a sub-section

- Renaming a sub-section

- Deleting a sub-section

For help hiding sidebar icons from the sidebar, see "Hiding or displaying sub-section links in a sidebar" on page 583.

Creating a sub-section

If you want to group multiple pages within your course context according to topic or some other common factor, create a sub-section. You can also create a sub-section within a sub-section.

To create a sub-section:

1　Log in to the portal and navigate to your course context (and, if appropriate, to one of its existing sub-sections).

2　Click **Context Manager**.

  The system displays the **Context Manager** screen, with the **Properties** tab selected by default.

3　Click the **Sub-Sections** tab.
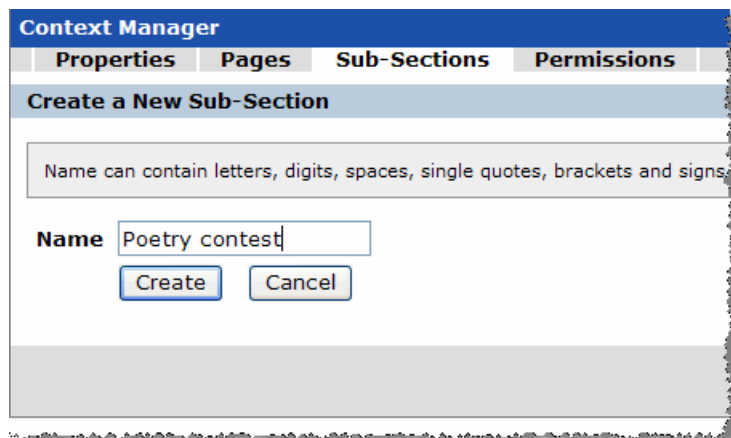
 The system displays a screen that includes a list of all the sub-sections that already exist on this tab (or sub-section).

4　Click **Create a New Sub-Section**.

  The system displays the **Create a New Sub-Section** screen.

5　In the **Name** field, type a name. This name will be displayed in the sidebar, if the course context or sub-section is configured to display sub-section icons in the sidebar. It will also be displayed in breadcrumbs. For these reasons, you should choose a meaningful name.

  Note that the name will also become part of the URL, and once the sub-section is created, you will not be able to change the URL (even if you change the name).

6   Click **Create**.

The system creates your new sub-section, and a default page for the sub-section. It also displays the **Sub-Sections** tab of the Context Manager, this time with your new sub-section listed.
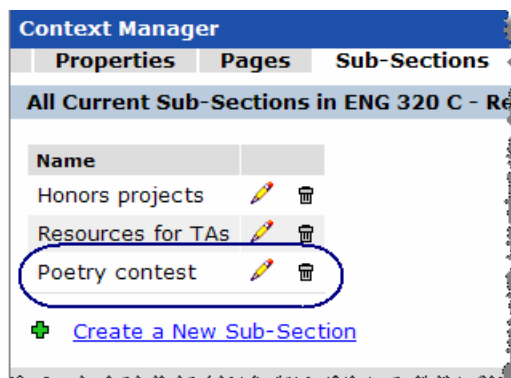
If the host tab (or sub-section) is configured to display sub-sections in the sidebar, the new sub-section will now show up there as well.

Renaming a sub-section

If you need to rename a sub-section, use this procedure. Note that when you do this, the URL is not renamed. The system will always use the URL that was created along with the sub-section.

To rename a sub-section:

1   Log in to the portal and navigate to the appropriate course section.

2   Click **Context Manager**.

The system displays the **Context Manager** screen, with the **Properties** tab selected by default.

3   Click the **Sub-Sections** tab.

The system displays a screen that includes a list of all the sub-sections in this context.

4   Locate the sub-section you want to rename. Click the corresponding pencil icon.
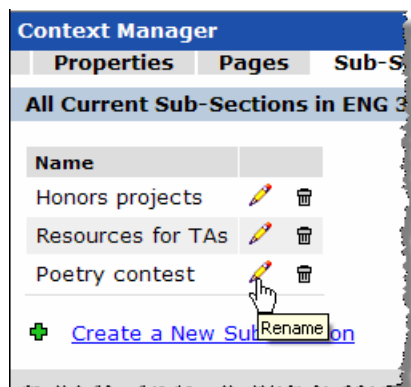
The system displays a screen that lets you rename the sub-section.

5   In the **Name** field, modify the text as appropriate.

6   Click **Rename**.

The system changes the name of your sub-section.

Deleting a sub-section

If you need to delete a sub-section, use this procedure. Note that when you delete a sub-section, you also delete all the pages and portlet instances it contains.

To delete a sub-section:

1   Log in to the portal and navigate to the appropriate course section.

2   Click **Context Manager**.

The system displays the **Context Manager** screen, with the **Properties** tab selected by default.

3   Click the **Sub-Sections** tab.

The system displays a screen that includes a list of all the sub-sections that exist on this tab (or sub-section).

4   Locate the sub-section you want to delete. Click the corresponding trash-barrel icon.

The system displays a dialog asking whether you are sure you want to delete the sub-section.

⚠   When you delete a sub-section, you also delete all content associated with that sub-section — including all child sub-sections, all pages, and the associated portlet instances. So do not delete a sub-section unless you are certain you don't need any of this content.

5   If you want to delete the sub-section and all its content, click **Yes, Delete**.

Specifying the default page for a course section

When a user selects any tab or sub-section, the system displays the "default page" for that tab or sub-section. However, you can make any page the default page.

The default page is slightly different from other pages in that its name is not displayed at the top of the page. Rather, the name of the tab or sub-section is displayed. The name of the page, however, *is* displayed in the breadcrumbs and in the sidebar. For this reason, we suggest a name that is meaningful and yet not so important that the page wouldn't make sense if the user didn't see it. "Home" is often a good name for a default page.

To specify the default page for sub-section:

1   Log in to the portal and navigate to the appropriate course section.

2   Click **Context Manager**.

The system displays the **Context Manager** screen, with the **Properties** tab selected by default.

3   Click the **Pages** tab.

The system displays a screen that includes a list of all the pages that exist on this tab. Note that this list includes only pages, not any child sub-sections that might exist. Similarly, if a page is part of a child sub-section, it will not be displayed here.

4   Use the radio buttons at the left to select a default page.

The system makes the page you selected the default.

An alternative method for specifying the default page is described in "Deleting a page" on page 576.

Working with sidebars

Both your course contexts and their sub-sections have sidebars — panes that are designed to display links to the child elements of the course or sub-section. You have a variety of options for making sure that sidebars are as helpful as possible to your users. This section describes those options:

- Hiding or displaying sub-section links in a sidebar
- Reordering sub-section links in a sidebar
- Reordering page links in a sidebar

Hiding or displaying sub-section links in a sidebar

By default, links to sub-sections are displayed in the sidebar of their host course or sub-section. However, you can hide the links. If you do this, just remember that you'll either need to create another method of letting users navigate to the sub-sections or else manually provide the URL to the people who need it.

Note that when you hide or display sub-section links in a sidebar, you do so for all sub-sections in that course or sub-section. You cannot hide or display one sub-section link only.

To hide or display sub-section links in a sidebar:

1 Log in to the portal and navigate to the appropriate course or sub-section.

If the links are currently displayed, you will see them in the sidebar. By default, they are presented as folder icons.

2 Click **Context Manager**.

The system displays the **Context Manager** screen, with the **Properties** tab selected by default.

3 Click the **Sub-Sections** tab.

The system displays a list of all the sub-sections that exist in this context.

4 As appropriate, select or de-select the **Display Sub-Sections in Sidebar** checkbox.

The screen refreshes.

5 Click **Exit**.

If you chose to display the sub-sections, the folder icons are now listed in the sidebar of the appropriate course or sub-section. If you chose to hide them, they are no longer displayed.

Reordering sub-section links in a sidebar

When displayed in a sidebar, sub-sections are by default displayed in the same order in which they were created. However, you can change this.

To reorder sub-section links in a sidebar:

1   Log in to the portal nd navigate to the appropriate course section or sub-section.

2   Click **Context Manager**.

The system displays the **Context Manager** screen, with the **Properties** tab selected by default.

3   Click **Reorder**.
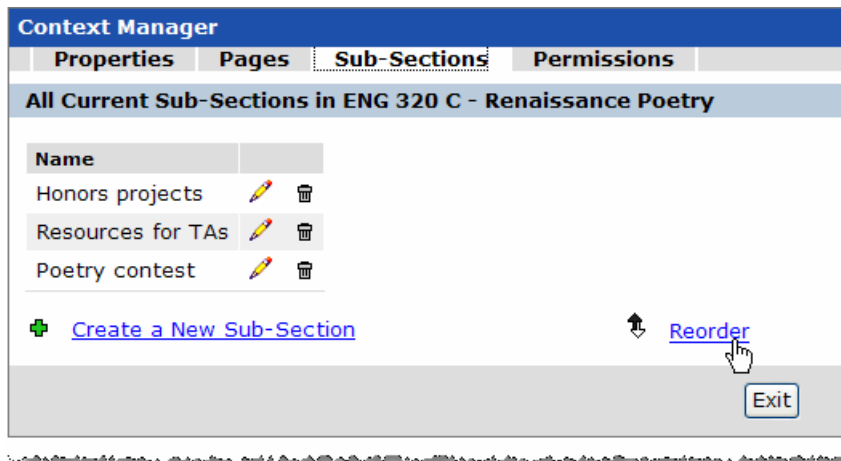
The system displays a screen listing each sub-section and its order in the sidebar.

4   Use the boxes at the left to specify the new order.
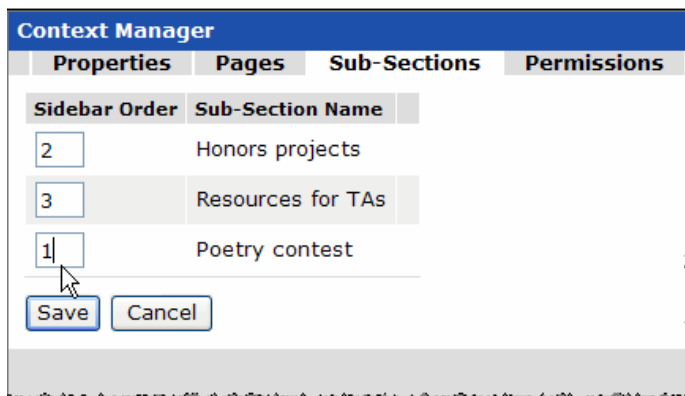
5   Click **Save**.

The system displays a dialog stating that you have successfully reordered the sub-sections.

Reordering page links in a sidebar

When displayed in a sidebar, the system places pages in the same order that they were created in. However, you can change this.

To reorder pages:

1   Log in to the portal and navigate to the parent tab or sub-section whose pages you want to re-order.

2   Click **Context Manager**.

The system displays the **Context Manager** screen, with the **Properties** tab selected by default.

3   Select the **Pages** tab.

4   Click **Reorder**.
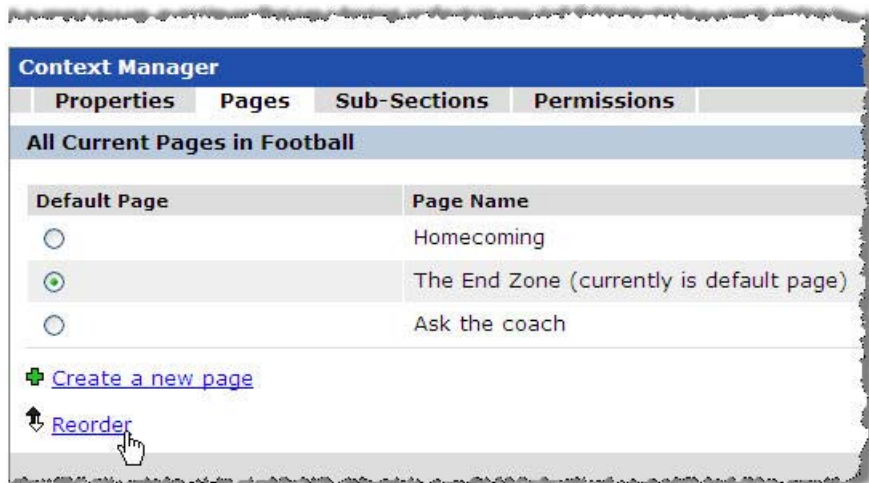
The system displays a screen listing each page and its order in the sidebar.

5   Use the boxes at the left to specify the new order.

6   Click **Save**.

The system displays a dialog stating that you have successfully reordered the pages.

35

Creating and maintaining roles

This chapter explains how to create and maintain roles for use in a course section or another context.

In this chapter:

- Key concepts
- Working with custom roles
- Working with student roles

Key concepts

In order to take certain actions in the portal, users must belong to roles. Each user inherits the privileges that are associated with the different roles that he or she belongs to.

About roles

The system allows for two different types of roles: **context-specific roles** and **base roles**.

Context-specific roles

Each context-specific role exists solely in one particular context. Put another way, a role that was created in one context has no effect in other contexts (and usually is not even evident in other contexts). It exists only for use in the context where it was created.

For each of your course contexts, there is a context-specific Faculty role and a context-specific Students role, which are automatically created and populated based on who is assigned to teach the course, and who is enrolled in the course.

Additionally, for your course (or for any other context that you manage), you may want to create custom roles for different groups of people, such as guest speakers, teaching assistants, and others. Essentially, you create a role if there is a group of people who should have a set of privileges that differs from that of existing roles. As part of the process of creating a role, you can add users to it, and you can also go back and modify the list of users later. At any time after the role is created, you can grant privileges to it.

Note that a course's Faculty and Students roles behave slightly differently than context-specific roles that you create, with the main difference being how users are added to these roles. For details, see "About the context-specific Faculty and Students roles" on page 589.

If you are managing a Campus Group, then each group context has a context-specific Leader and Member role, which also are handled differently from custom roles. For details on Campus Group roles, see Chapter 18, "Campus Groups."

Base roles

Base roles — also called global roles — exist throughout the system. Any context manager or administrator can grant privileges to these roles, but only a member of the Administrators role can create a base role.

Note that there is global Faculty role and a global Students role, which are different from the context-specific Faculty and Students role. The global roles are intended to include all faculty and students at your institution. The global roles are probably used for things like letting administrators make announcements to all faculty and students in the school, and they do not necessarily give a user any permissions within your course context.

Users do not have to belong to the global Faculty and Students roles in order to be added to a context-specific Faculty or context-specific Students role.

About the context-specific Faculty and Students roles

Every course section has a context-specific Faculty role and a context-specific Students role. These roles behave differently from custom context-specific roles in the following ways:

- You cannot modify the names of these roles.

- You cannot add users to these roles in the same way as you would to custom roles.

The way you add users varies depending on the type of course you're dealing with, as described below in "Faculty and enrolled students."

With students, you also have one other option for adding users, which is described in "Non-roster students."

Faculty and enrolled students

In general, members of the Faculty and Students roles are defined outside of the course context. The way this is done varies depending on the type of course:

- With portal-only course sections, you can add faculty member and students using Course Creator. This process is described in "Creating portal-only courses" on page 611.

- With course sections defined in the ERP system, the only way to add new faculty members and actively enrolled students is to do so within the ERP system. Once the DIS runs, the user(s) will be added to the role.

Non-roster students

With both portal-only classes and ERP classes, you also have another option — you can add a student as a **non-roster student**. Doing this adds the user to the context-specific role and also gives the user full student-level access to the context's pages and portlets. This is an important feature because there is no other way to give users the ability to take tests and view their progress on grade sheets (other than actually enrolling the student in the course, as described in "Faculty and enrolled students," above).

Another feature of the context-specific Students role that varies from the Faculty role is that you are able to view a list of all people associated with the Students role — current and former members, roster and non-roster students — within Context Manager.

For details on these features, see "Working with student roles" on page 593.

Working with custom roles

This section explains how to create and manage custom context-specific roles.

Creating a role

Use this procedure to create a role for any of the following:

- Your course context.

- Any other context that you manage, such as a Campus Group context.

- Any sub-section that you manage.

*When you create a role for a context, the role will **not** be available for use within the child sub-sections of the context you are working in (if any exist). Similarly, if you create a role within a particular sub-section, it will not be available outside of that sub-section.*

To create a context-specific role:

1 Log in to the portal and navigate to the course context or sub-section where you want to create a role. For example, if you want the role to be available to the main pages in your course section, such as Attendance, Coursework, and the Gradebook, you could navigate to any one of those pages, or to the default page for the course section.

If you want to create a role for use in a sub-section, just navigate to any page in the sub-section.

2 Click **Context Manager**.

The system displays the **Context Manager** screen, with the **Properties** tab selected.

3 Click **Permissions**.

The system displays the **Define Permissions** screen.

4 Click **Add a Role**.

The system updates the screen to include a form.

5   In the **Role Name** field, enter a name.

6   Do either or both of the following:

   •   If you want any existing roles (and their users) to be automatically assigned to this role, use the available checkboxes to select the roles. Note that you may select either from the global roles or from any other context-specific roles that you might have created, both here and in other contexts.

   •   If you want to add individual users to the role, click **Add Individual Users** and use the pop-up to select users. If you need help with this, see .

7   Click **Save**.

Modifying a custom role

At times you may need to modify a custom role. For example, you may want to change either of the following:

•   The name of the role.

•   Add or remove users from the role.

To do either of these things, use the procedure below.

> *If you are looking for information on how to add users to a Faculty or Students role, see . If you are looking for information on how to add users to a Group or Leaders role, see *

To modify a custom context-specific role:

1   Log in to the portal and navigate to the appropriate context.

2   Click **Context Manager**.

The system displays the **Context Manager** screen, with the **Properties** tab selected.

3   Click **Permissions**.

The system displays the **Define Permissions** screen.

4   Locate the role you want to modify and click the corresponding pencil icon.
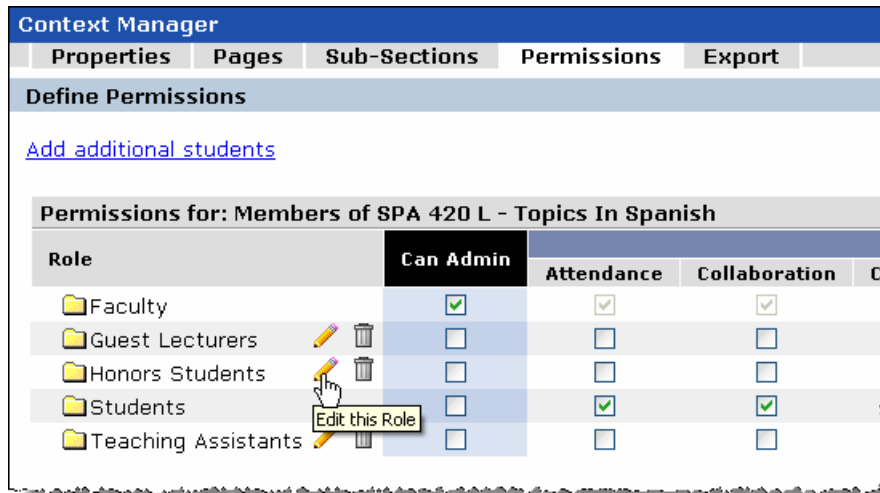
The system updates the screen to include a form.

5   If appropriate, use the **Role Name** field to modify the name of the role.

6   If desired, select or de-select any roles that you want to add or remove from the role you are currently editing.

7   If you want to add or remove individual users from the role, click **Add Individual Users** or **Edit Users** and use the **Select Users** pop-up to modify the list of people. If you need help with this, see "Selecting users" on page 628.

8   Click **Save**.

Working with student roles

This section explains how to do the following:

- Display a list of all enrolled student and all non-roster students, including those that have been withdrawn.

- Add and remove non-roster students.

About non-roster students

There may be times when you want to allow a student who is not enrolled in a class to have full access to the course context. You do this by making the user a non-roster student. A non-roster student will have all of the following:

- A link to the course context under the **My Courses** label (in the **Quick Links** section of the sidebar).

- Full student access to the Coursework and Gradebook portlets, including the ability to take tests and have a gradesheet.

- Permissions to view all other resources within the course context — all other pages, portlets, and materials.

For an ERP course, these users are treated as enrolled students in all ways except that their grades for the course are never sent to the ERP system. Also, on the **Context Manager** > **Permissions** tab, they are labeled as non-roster students.

For a portal-only course, there is nothing to distinguish non-roster students from enrolled students, except that on the **Context Manager** > **Permissions** tab, they are labeled as non-roster students.

You can add any user (but not a guest) as a non-roster student. In other words, the person has to have a valid JICS account but does not have to be a member of the global Students role or any other role. From a technical standpoint, what happens when you designate the user as non-roster student is that he or she is added to the context-specific Students role for the course context.

Non-roster students are managed through the Context Manager's **Permissions** tab.

If you want to give someone access to the course context, but not give them the ability to take tests, you should consider adding the user to a custom role that is configures with the appropriate access.

Viewing a list of all students

If desired, you can view a list of all students for a course section, including:

- All enrolled students (roster students).

- All non-roster students.

- All students who have withdrawn from the class, whether they were enrolled or non-roster students.

To view a list of all students:

1   Log in to the portal and navigate to the appropriate course context.

2   Click **Context Manager**.

The system displays the **Context Manager** screen, with the **Properties** tab selected.

3   Select **Permissions**.

The system displays the **Define Permissions** tab.

4   Click **Add additional students**.
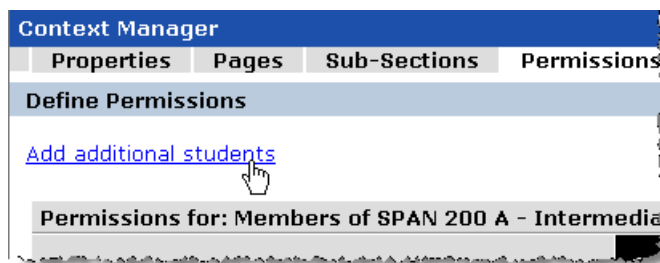
The system displays a screen that lists all roster students, as well as any withdrawn students and any non-roster students that have been added.

Adding a non-roster student

Use this procedure to make a user a non-roster student. From a technical standpoint, what this process does is add the user to the context-specific Students role for the course. For details on how this process will affect the user's experience, see "About non-roster students" on page 593.

If you have users with any sort of grading and content-management permissions in the Coursework or Gradebook portlets, these users should never be added as non-roster students, because doing so will remove any extra permissions that you want them to have in those portlets.

To add a non-roster student:

1   Navigate to the **Permissions** screen that shows all students in the course, as described in "Viewing a list of all students" on page 593.

2   Click **Add a non-roster student**.
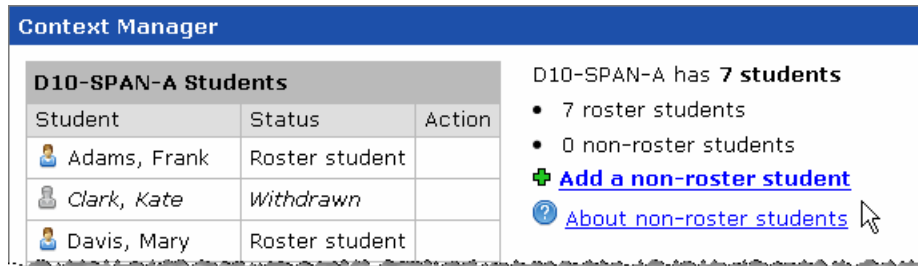
The system displays a pop-up labeled **Add a non-roster student**. This pop-up that lets you do either of the following:

- Select a role and all of its members.
- Click **Add Individual Users** to display a second pop-up that lets you select specific people.

3   Use the pop-up(s) to select either a role or an individual user (or users). If you need help with this, see .

4   In the **Add a non-roster student** pop-up, click **Save**.

The system adds the non-roster student to the course. The student's name is now displayed on on the **Context Manager** > **Permissions** screen, with the status **Non-roster,** and the user should now be able to access the course context.

Removing a non-roster student

Use this procedure to remove a non-roster student from a course — ending his or her ability to access the course context.

To remove a non-roster student:

1   Navigate to the **Permissions** screen that shows all students in the course, as described in .

2   In the list of students, locate the one you want to remove from the course.

3   Click the corresponding **Remove** link.
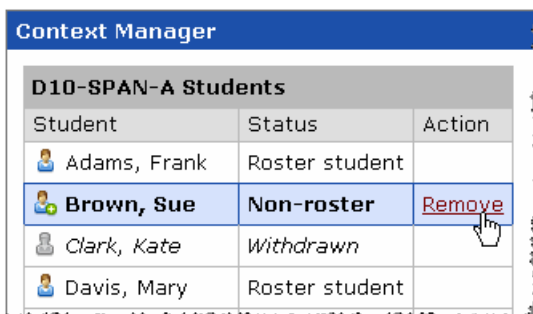
The system removes the student from the course — but note that the student's name with a status of **Non-roster, Withdrawn**. The student will no longer see the link to this course under **My Courses**, and will not be able to display the course's content.

In the faculty view of the Coursework and Gradebook portlets, the student's work and scores are still saved, but they are moved to a section labeled **Withdrawn students**.

If you need to reactivate this user's student status, you can do so. For details, see "Reactivating a withdrawn non-roster student" on page 597.

Reactivating a withdrawn non-roster student

If you have removed a non-roster student from a course and you want to add the user back, you can do so. When you do this, the student's Coursework (if any) will be restored for him or her to view. The student's overall grade sheet will also display as it last did for the student before being removed.

To reactivate a non-roster student:

1   Navigate to the **Permissions** screen that shows all students in the course, as described in "Viewing a list of all students" on page 593.

2   In the list of students, locate the one you want to reactivate.

3   Click the corresponding **Reactivate** link.

   The system adds the student back to the course the course. If the student previously had received grades for any assignments, then within the Faculty view of the Coursework and Gradebook portlets, the system moves the student's records from the withdrawn students' section back to the list of active students.

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Managing page and context permissions

This chapter explains how you can manage access to pages and to sub-sections and how to give another role permission to help you administer your course context, along with related topics.

In this chapter:

- Key concepts

- Letting a role view pages and context links

- Managing portlet permissions

- Letting a role administer a context

Key concepts

To give privileges to your users, you assign them to roles, and they inherit the roles associated with those privileges.

Automatically assigned privileges

In some cases, roles are automatically associated with privileges. For example, in the default setup of the portal, the following are true:

• Members of the Faculty role have the **Can Admin** privilege in their own course contexts.

• Members of the Students role can view several pages of the contexts for course sections that they are enrolled in.

• In the Forums portlet, by default, members of the Users role can publish posts and reply to posts.

Manually assigned privileges

This chapter describes the privileges that you may want to grant to the various roles, including permission to:

• View pages.

• View links to sub-sections.

• Managing a course section or a sub-section.

• Permission to view and manage portlets, or to take specific actions within portlets.

This chapter deals with the first few bullet points, but not the last.

The last bullet point is not covered in this chapter, because the specifics of portlet permissions vary depending on the type of portlet. For help with this, view the chapter or section for the portlet for which you need to assign privileges.

Letting a role view pages and context links

You may have pages in your portal that should be viewable by some roles, but not others. For example, you might have a series of pages intended only for your teaching assistants. You would manage this by creating a Teaching Assistants role and granting it access to the page.

If the page is part of a sub-section, note that when you grant the role permission to display the page, you also grant the role permission to display the display the sidebar link to the sub-section — though when they click this link, they will see only those pages that you specifically have given them access to view. This assumes that the use has permission to view the tab.

If the user does *not* have permission to the view the tab, you may need to provide members of the role with a link to the sub-section or pages that you want them to have. For example, if a sub-section is nested within a tab, just giving the role permission to view a page within the sub-section will not make the tab display for the user. So in that case you may need to provide members of the role with a link to the sub-section or pages that you want them to have.

To let a role view a page:

1   Log in to the portal and navigate to the page for which you want to set permissions.

2   Click **Edit Page**.

    The system displays the **Customize page** *name* screen, with the **Properties** tab displayed.

3   Click the **Permissions** tab.

    The system displays a screen that lists each role.

4   Locate the role to which you want to give permission and select the corresponding **Can View** checkbox.

5   Click **Save**.

    The system refreshes the page and saves your selection. The role you chose now has permission to view the page.

Managing portlet permissions

Managing access to portlets is done in a few ways:

- You can set permissions for individual portlet instances. Depending on the type of portlet, this can give the roles a wide variety of different privileges. The different permissions vary by portlet and are covered in the chapters that deal with individual portlets.

- If you want a role to have the administrative privileges available through the wrench icon — including the **Settings** and **Permissions** tabs, you must give the role administrative privileges in the context, as described in "Letting a role administer a context" on page 603.

Note that there is another level of portlet permissions — these are "global" permissions. Each global permission affects all instances of a particular portlet type. As a faculty member you probably do not have the ability to work with global permissions, but if you have a user that is having trouble working with a portlet, the reason might be global permissions (also called global portlet operations). For help, check with your portal administrator.

Letting a role administer a context

In some cases, you might want members of another role to help you manage your course section, or perhaps one of its sub-sections. To set this up, you grant that role the **Can Admin** privilege for the appropriate context.

When you give a role this permission, members of the role are allowed to do the following:

- Display any direct child pages in the context. For example, if you grant a role the **Can Admin** privilege for a course context, the role can view all the pages that are direct "children" of the context, such as Attendance and Coursework.

- Display and administer all pages on all child contexts of the context, if any exist. For example, if you grant a role the **Can Admin** privilege for a course context, then that role is automatically granted the **Can Admin** privilege in all of the child contexts.

- Add pages (either directly to the context, and to any child contexts).

- Edit any existing pages.

- Add sub-sections.

- Administer existing sub-sections.

- View and administer all portlet instances in the context. This includes having access to the **Settings** and **Permissions** tabs for all portlet instances.

- Give permission to other roles to view and administer the tab or sub-section (as well as remove the permission).

To give users permission to administer a context:

1 Log in to the portal and navigate to the page for which you want to set permissions.

2 Click **Context Manager**.

The system displays the **Context Manager** screen, with the **Properties** tab selected by default.

3 Click the **Permissions** tab.

The system displays the **Define Permissions** screen, which lists all the roles in the system and at least two columns at the right, labeled **Can Admin** and **Can View Page**.

4 Locate the role to which you want to grant administrative access and select the corresponding checkbox in the **Can Admin** column. Note that when you select **Can Admin**, the system automatically gives the role View privileges to all the pages in the context (if the role does not already have them).

5 Click **Save**.

Part 7: Appendices

This section covers topics that might be of interest in various contexts.

In this section:

A

Previewing a context as a student

If you want to preview your course context as a member of another role, you can do so using a feature called Student Emulation.

In this chapter:

- Key concepts
- Recommended uses
- Changing your view

Key concepts

Student Emulation lets you preview elements of your course context as a member of another role. For example, you can preview pages and portlets to see how they display for members of the Students role, or for members of any context-specific roles that have been defined.

Student Emulation is an optional feature of e-Racer. The feature is present in your system only if an administrator has configured it. (For details on configuring Student Emulation, check with a portal administrator or see *Jenzabar's Internet Campus Solution: Administration Guide*.)

Recommended uses

The following are some notes about using Student Emulation.

General navigation

While in Emulation mode, you can navigate through an entire course context as a student (or as a member of another role). However, when you navigate away from the course context — for example, if you go to a different course context or if you navigate away from the Academics tab — Emulation will automatically be turned off and the system will revert to the faculty view.

Most of what you see in Emulation mode is exactly what a student would see. However, note the following:

- When viewing the Attendance portlet in Emulation mode, the portlet will indicate that you were present every day.

- If you are in Emulation mode and go to the Gradebook, the portlet will show a gradesheet for you. This gradesheet will show only grades for assignments that you completed in Emulation mode.

- When viewing the Task Manager portlet, the portlet will hide controls such as the **Save** and **Edit** buttons, because you cannot use them while in Emulation mode.

Previewing Coursework

You may want to preview the Coursework portlet to ensure that the list of assignments display for students as you intend.

Note that you can page through online assignments using the student view, to make sure they display as you intend. You can also complete assignments — both online and file-exchange assignments — while in Emulation mode. While in the student view, you can also review your results (if the assignment is configured to allow this).

If you complete an assignment in Emulation mode, note that when you are back in the faculty view and you display the Assignment Info screen, the results from your test-taking will be grouped under a heading labeled **Results from Student Emulation**.

Similarly, the grades you receive will not be treated as real grades in the **Assignment Stats** area of the screen. That is, the Emulated grades will not affect the average score displayed for the class, nor the high and low scores.

Changing your view

When Student Emulation is active, you can use it to preview any page in your course context as a member of another role.

To change your view:

1 Open the appropriate course context, as described in .

2 Navigate to the page that you want to preview.

3 Locate the **Student Emulation** drop-down list, which is in the upper right corner of the page.
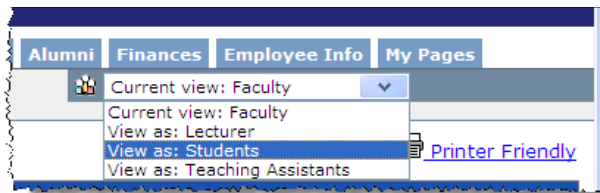
Note that if you are a member of the Administrators role, the **Current view** option will say **Current view: Course Administrator**, rather than **Current View: Faculty**.

4 Use the drop-down list to choose the role whose view you want to see.

The page updates to include a button to the right of the drop-down list.
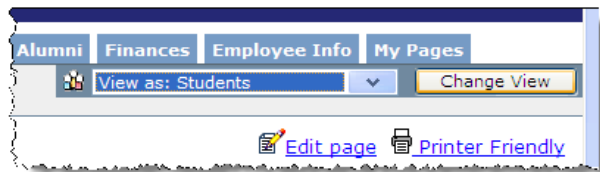
5 Click the **Change View** button.

The screen updates to display as it would for a member of the role you chose. If you had maximized a portlet just prior to changing views, note that the preview begins by showing the page with all the portlets on it — but you can still view the maximized portlet in Emulation mode. Just maximize it again.

The system also hides the drop-down list and replaces it with labeling that shows what view you are currently displaying.
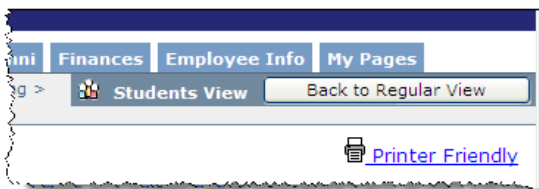
6 When you are done with the preview, click the button labeled **Back to Regular View**.

B

Creating portal-only courses

If you have access to the Course Creator portlet, you can use it to create portal-only courses, course sections, terms, and departments.

In this chapter:

- Key concepts
- Working with departments
- Working with terms
- Working with courses and sections

Key concepts

The Course Creator portlet lets you do the following:

- Create portal-only courses — courses that exist independently of your ERP system. This feature can be useful if, for example, you want to create a not-for-credit course, such as a training session on how to use e-Racer.

- Create sections of portal-only courses.

- Create portal-only sections of existing courses defined in your ERP system.

- Create portal-only departments and terms.

- Assign portal-only courses to departments that exist in the ERP system *or* to portal-only departments.

- Assign portal-only course sections to terms that exist in the ERP system *or* to portal-only terms.

In this chapter, the four items that can exist either in "portal-only" form or within the ERP system — courses, course sections, departments, and terms — are sometimes referred to as **elements**.

Before being able to use the Course Creator portlet, you must add it to your course context (if an administrator has not already done this, or placed it elsewhere in the portal). You may also want to double-check that your portal administrator has given the Faculty role the **Can Manage Courses** global portlet operation for the Course Creator portlet.

All Course Creator portlet instances behave identically

All Course Creator portlet instances host the same data. That is, throughout your system, any occurrence of the Course Creator portlet can be used to manage any portal-only course, section, department, or term that might be defined. Similarly, there are no instance-specific permissions associated with Course Creator. Every occurrence of the portlet in your system should behave in exactly the same manner.

Default view versus the maximized view

This section describes the default view versus the maximized view of the Course Creator portlet.

Default view

The default view of the portlet shows controls you can use to create portal-only courses and portal-only course sections. It also includes a link labeled View Current Courses — clicking this link maximizes the portlet.

Maximized view

When you maximize the Course Creator portlet, the portlet by default displays the following:

- In the upper part of the portlet, a series of controls that let you work with portal-only courses, course sections, departments, and terms.

- In the main body of the portlet, a list of departments, courses, and course sections. In some ways, this view varies based on how you set the **Select a Term** drop-down list. Essentially, the list includes:

  - An alphabetical list of departments. The following departments are listed:
    — ERP departments that are associated with portal-only course sections that takes place in the currently selected term.
    — All portal-only departments (*regardless* of whether they are associated with portal-only course sections in the selected term — all are listed).

  - Under each listed department, the portlet lists any course associated with a portal-only course section that takes place in the currently selected term and, under the course, the appropriate course section(s) are listed.

If you are allowed to take any actions on any of the elements listed, the system marks the item with a downward-arrow icon. You can click the icon to display a pop-up box that lists actions you can take.
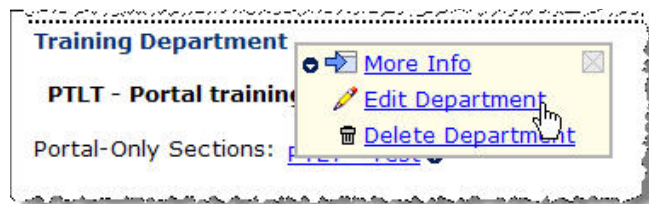
Planning

As noted in subsequent sections in this chapter, for each portal-only element that you can create, you must assign it a code. These codes are defined when you create the elements, and they cannot be modified later. For this reason, your school may want to define acceptable protocols for these codes before faculty members begin creating portal-only elements.

Note also that portal-only departments and courses are sometimes listed alongside those that were created in the ERP system, and this distinction may not be immediately evident in some cases. For this reason, you may want to create a protocol for codes that denotes portal-only elements as being just that — for example, you could mandate that the last two characters in each course code be "-O" for "online."

Working with departments

If you plan to create portal-only courses, you may want to organize them into one or more portal-only departments. This section describes how to create, modify, and delete portal-only departments.

Creating departments

Use this procedure to create a portal-only department.

To create a department:

1   Navigate to an instance of the Course Creator portlet and maximize it.

2   Locate the link labeled **Departments** and click it.
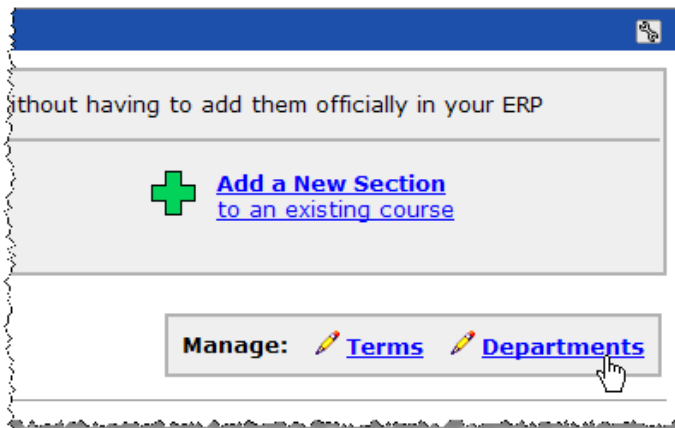
The system displays the **Add a Department** screen, which lists all the portal-only departments defined in the system.

3   Click the **Add a Department** link.

The system displays a form.

4   In the **Department Name** field, enter a name for the new department.

5   In the **Department Code** field, enter a unique code for the department. Note that once you create the department, the code cannot be changed — so be sure to enter a code that conforms to whatever naming convention your school has decided to use.

6   Click **Save**.

The system again displays the list of departments, this time with the new department listed. The system also creates a page for the department within the Academics tab.

Renaming a department

Use this procedure to change the name of a department.

To rename a department:

1   Navigate to an instance of the Course Creator portlet and maximize it.

The system displays the full view of the Course Creator portlet.

2   Display the **Edit Department** screen:

a   In the main Course Creator portlet, click the **Departments** link.
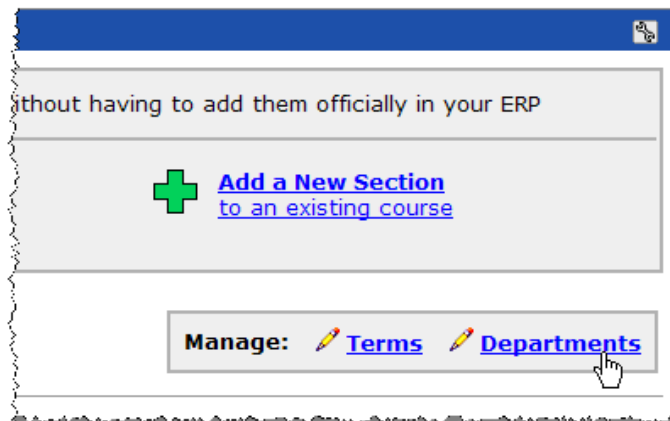
b   The system displays the **Add a Department** screen, which lists all the portal-only departments defined in the system.

c   Locate the department you want to modify and click the corresponding pencil icon.

The system displays the **Edit Department** screen for that department.

3   Modify the **Department Name** field as appropriate.

4   Click **Save**.

An alternate way of displaying the Edit Department screen is to click the downward-arrow icon next to the name of any portal-only department, then choose the Edit Department option from the pop-up menu.

Deleting a department

When you delete a portal-only department, you also delete all courses and course sections that are assigned to the department.

To delete a department:

1   Navigate to an instance of the Course Creator portlet and maximize it.

The system displays the full view of the Course Creator portlet.

2   In the main Course Creator portlet, click the **Departments** link.
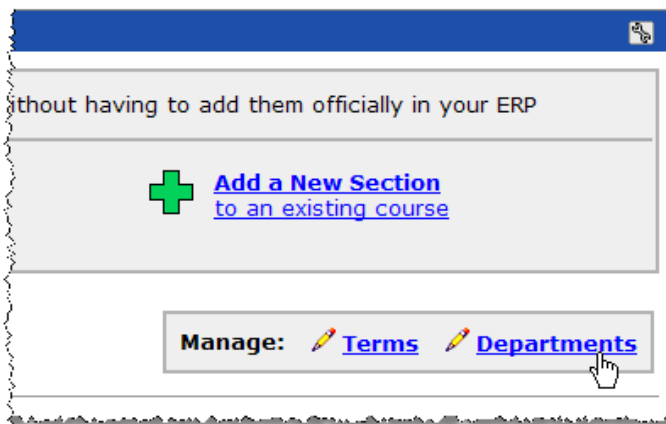
The system displays the **Add a Department** screen, which lists all the portal-only departments defined in the system.

3   Locate the department you want to delete and click the corresponding trash-barrel icon.

The system displays a dialog box asking whether you are sure you want to delete the department, along with all its courses and course sections.

4   If you are sure you want to delete the department, click **OK**.

The system deletes the department.

An alternate way of deleting a department is to click the downward-arrow icon next to the name of the department, then select the Delete Department option.

Working with terms

When you create a course section, you must assign it to a term. You can either assign a section to a term defined within the ERP system, or you can assign it to a portal-only term. This section describes how to create and delete portal-only terms.

Creating a term

You might want to create a portal-only term if you are planning to create portal-only course sections that have nothing to do with the standard academic calendar defined in your ERP system. For example, if you are planning a course section designed to train employees hired in the second quarter, you might want to create a term named "Q2."

Note that once you create a term, you cannot modify it.

To create a term:

1   Navigate to an instance of the Course Creator portlet and maximize it.

    The system displays the full view of the Course Creator portlet.

2   Click the **Terms** link.
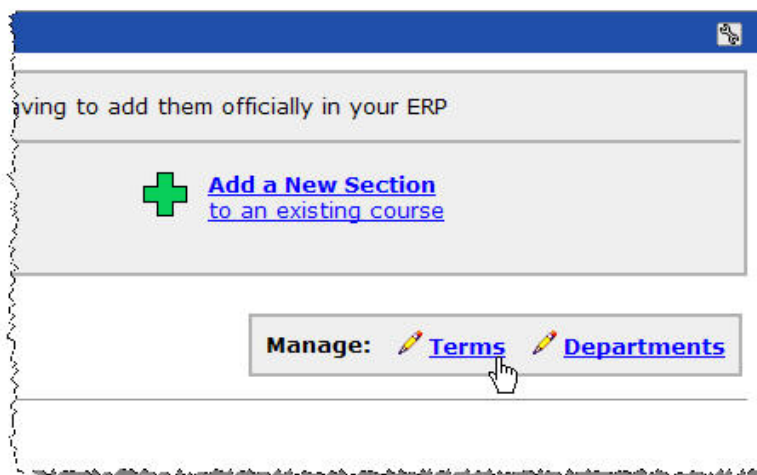
    The system displays the **Add a Term** screen, which lists all the portal-only terms defined in the system.

3   Click **Add a Term**.

    The system displays a form.

4   In the **Term Name** field, enter a name for the new term.

5   In the **Term Code** field, enter a unique code for the term. Note that once you create the department, the code — like all else about the term — cannot be changed. So be sure to enter a code that conforms to whatever naming conventions your school has decided to use.

6   Use the **Start Date** and **End Date** fields to define the term period.

7   Click **Save**.

The system again displays the **Add a Term** screen, this time with the new term listed.

Deleting a term

Note that you can only delete a term if there are no course sections associated with it.

To delete a term:

1   Navigate to an instance of the Course Creator portlet and maximize it.

The system displays the full view of the Course Creator portlet.

2   Click the **Terms** link.

The system displays the **Add a Term** screen, which lists all the portal-only terms defined in the system.

3   Locate the term you want to delete and click the corresponding trash-barrel icon. If there is no trash-barrel icon next to the term you want to delete, that means that the term is associated with one or more course sections, and it cannot be deleted.

The system displays a dialog box asking if you are sure you want to delete the term.

4   If you are sure you want to delete the term, click **OK**.

The system again displays the **Add a Term** screen, this time without the deleted term.

Working with courses and sections

You create a portal-only course if you do not need any record of the course in your ERP system.

Note that each course must be associated with a department, and each course section must be associated with a term. That is, a course is a definition of a curriculum. The section is an occurrence of the course at a specific time and place. For example, a course might be "New employee orientation." A section of that course might be "New employee orientation - MWF."

There is no way within the Course Creator portlet to display every portal-only course that you have created. The system is designed to display course sections, but not courses. For this reason, you may want to maintain a master list of portal-only courses and keep it in a secure location.

Note also that a course cannot be modified or deleted unless you have created at least one section of that course.
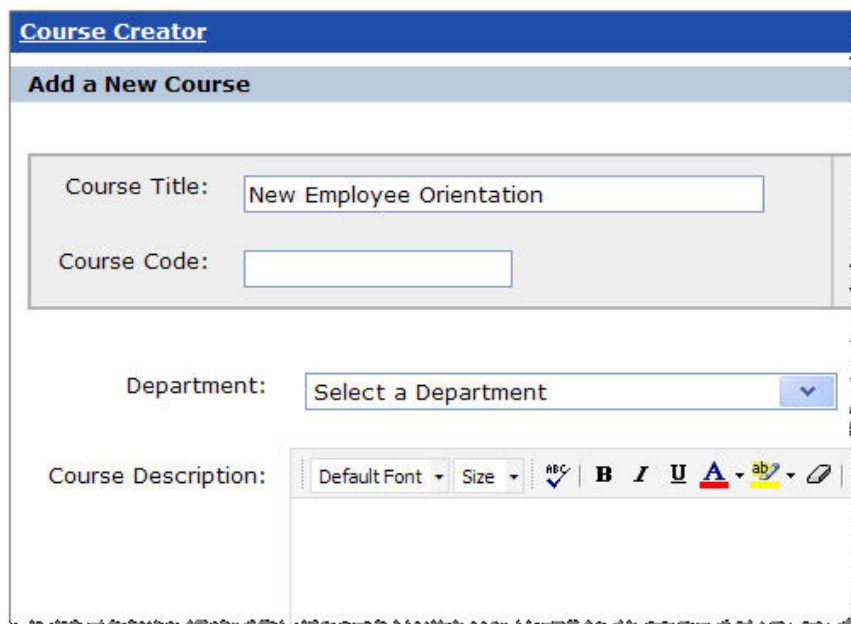
Creating a course

Use this procedure to create a portal-only course.

To create a course:

1   Navigate to an instance of the Course Creator portlet.

2   Click the link labeled **Add a New Course**.

The system displays the **Add a New Course** screen.

3   In the **Course Title** field, enter a name for the course.

4   In the **Course Code** field, enter a code for the course. Note that once you create the course, the code cannot be changed — so be sure to enter a code that conforms to whatever naming conventions your school has decided to use.

5   Use the **Department** drop-down list to assign the course to a department. Note that you can choose either a portal-only department or a department that is defined in the ERP system. Once the course is created, you cannot assign it to another department, so you may want to take your time and make sure you are choosing the correct department.

If you need to create a portal-only department at this time, you can by clicking the **Add a Department** link and filling out the resulting pop-up form.
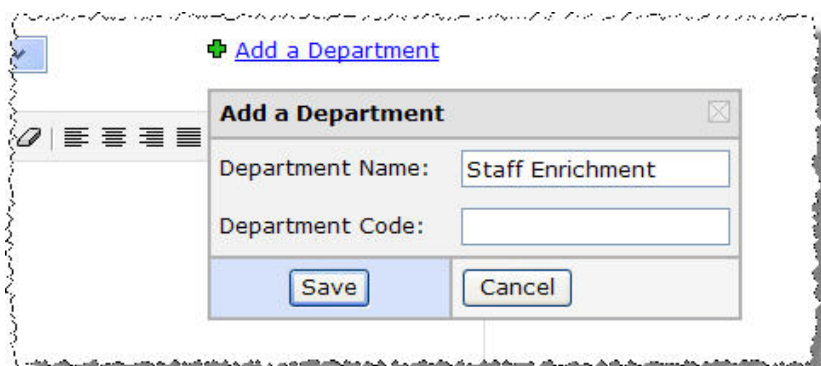
6   In the **Description** field, add a description of the course.

7   Click **Add Course**.

The system creates your course and displays the **Add a section** screen. As part of creating the course, the system creates a page for the course on the Academics tab and adds a link to this page from the appropriate department context.

You can either stop now and plan to add a section to your course later, or you can go ahead and add a section now by completing this procedure described in "Creating a section." We recommend adding at least one section now. Until you add a section to the course, you will not be able to modify or delete the course.

Creating a section

Use this procedure to add a section to an existing course — either a portal-only course or a course that was created within your ERP system.

To create a section:

1   If you have not already done so, display the **Add a section** screen by completing the following steps:

   a   Navigate to an instance of the Course Creator portlet and maximize it.

       The system displays the full view of the Course Creator portlet.

   b   Click the **Add a New Section** link.

The system displays the **Select a Course** screen. You use this screen to pick the course to which you want to add a section.

c   In the **Select a Course** field, enter the name of the course, or part of the course name, and then wait a moment.

The system displays a list of courses that include the letter(s) you entered, along with their course codes. Note that this list includes both portal-only courses and courses that exist in the ERP system. If appropriate, you can filter the list using the **Department** drop-down list.

d   Select the course you want.

The system displays the **Add a section** screen, with the name of the course you chose displayed at the top.

2   Use the **Term** drop-down list to choose a term for the new section.

3   In the **Section Code** field, enter a code for the section. Note that once you create the section, the code cannot be changed — so be sure to enter a code that conforms to whatever naming convention your school has decided to use.

4   You are not required to fill out any other fields at this time, though you may want to do some or all of the following:

- Use the **Section Title** field to enter a name for the section.
- Click the **Add Faculty** link to assign a faculty member to the section.
- Click the **Add Students** link to assign students to the section.

5   Do one of the following:

- If you are not planning to create additional sections right now, click the **Add Section** button at the bottom left of the screen ("Add section and exit").
- If you want to add this section and create another, click the **Add Section** button in the center of the screen ("Add section and add another").

If you did not add a faculty member, the system displays a dialog asking whether you are sure you want to create the section without assigning a faculty member to it. In this case, either cancel out of the dialog box and return to step 4, or click **Yes**.

The system adds your section and, depending on which button you chose, either re-displays the **Add a section** form or displays the main Course Creator portlet view.

Once a course section is created, the system creates a course context for the section. If you have assigned a faculty member to the section, the system adds a link to the course context to the faculty member's **My Courses** link list.

Modifying a course

After you create a course, you may want to modify the course's name or description. To do so, use this procedure.

Note that you cannot modify any aspect of a course unless you have defined a section of the course. If you need to add a course section, see "Creating a section" on page 620.

Additionally, you cannot modify the course code or re-assign the course to a different department. For these parameters, the values you defined when creating the course are permanent.

To modify a course:

1 Navigate to an instance of the Course Creator portlet and maximize it.

   The system displays the full view of the Course Creator portlet.

2 Locate the course that you want to modify on the screen. If the course is not displayed, use the **Term** drop-down list to locate a term associated with a section of the course you want to modify.

3 Click on the downward-arrow next to the name of the course.

   The system displays a pop-up menu.

4 Select **Edit Course**.

   The system displays a screen labeled **Add a New Course** — which also lets you modify the course.

5 Make any changes that are appropriate.

6 Click **Save Course**.

Modifying a course section

After you create a course section, you may want to modify any of the following:

• The section's title.

• The teacher assigned to the section.

• Students enrolled in the section.

• The meeting time for the section.

To make any of these changes, use the following procedure.

Note that you cannot modify the course section code or reassign the course to a different term. For these parameters, the values you defined when creating the course section are permanent.

To modify a course section:

1 Navigate to an instance of the Course Creator portlet and maximize it.

The system displays the full view of the Course Creator portlet.

2 Locate the course section that you want to modify on the screen. If the section is not displayed, use the **Term** drop-down list to modify the view until you find it.

3 Click on the name of the course section.

The system displays the **Edit Section** screen.

4 As appropriate, modify any of the values displayed in the screen.

5 Click **Save Changes**.

Deleting a course

At times, you may need to delete a course. Note that when you delete a course, you also delete all of its sections, and all of the data in the course contexts for those sections.

You cannot delete a course unless you have defined a section of the course. If you need to add a course section, see "Creating a section" on page 620.

To delete a course (and all of its sections):

1 Navigate to an instance of the Course Creator portlet and maximize it.

The system displays the full view of the Course Creator portlet.

2 Locate the course that you want to delete. If the course is not displayed on the screen, use the **Term** drop-down list to change the view. Essentially, you need to display a term for which there is a scheduled section of the course you want to delete.

3 Click on the downward-arrow next to the course name.

The system displays a pop-up menu.
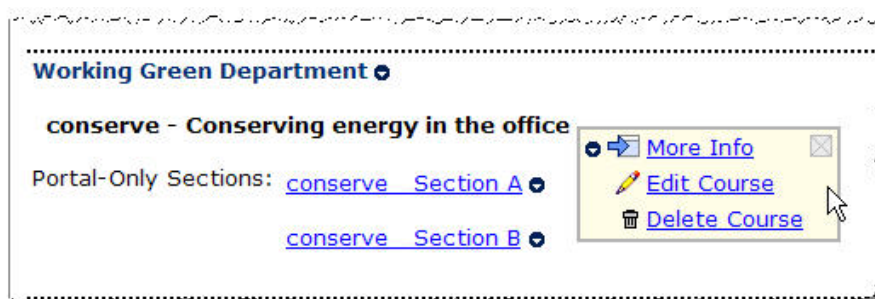
4   Select **Delete Course**.

The system displays a dialog asking if you are sure you want to delete the course and all the sections associated with it.

5   If you are sure you want to delete the course, click **OK.**

Deleting a course section

At times, you may need to delete a course section. Doing so also deletes the course context of the section and all of the data that the context contains.

To delete a course section:

1   Navigate to an instance of the Course Creator portlet and maximize it.

    The system displays the full view of the Course Creator portlet.

2   Locate the course section that you want to delete. If the section is not displayed, use the **Term** drop-down list to modify the view until you find it.

3   Click on the downward-arrow next to the name of the course section.

    The system displays a pop-up menu.

4   In the pop-up menu, select **Delete Section**.

    The system displays a dialog asking if you are sure you want to delete the section and all of the portlets and associated data, including grades and attendance information.

5   If you are sure you want to delete the section, click **OK**.

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Common features

This section describes how to use certain features and controls that occur in several places throughout the portal.

In this chapter:

-
-
-

Selecting users

In many parts of the portal, you will see a pop-up that lets you select roles and individual users. This section explains how to use this pop-up.

To select roles and individuals:

1   Do one of the following:

- If you want any existing roles (and their users) to be automatically assigned to this role, use the available checkboxes to select the roles. Note that you may select either from the global roles or from any other context-specific roles that you might have created, both here and in other contexts.

- If you want to add individual users to the role, complete the following steps:

    a   Click **Add Individual Users**.
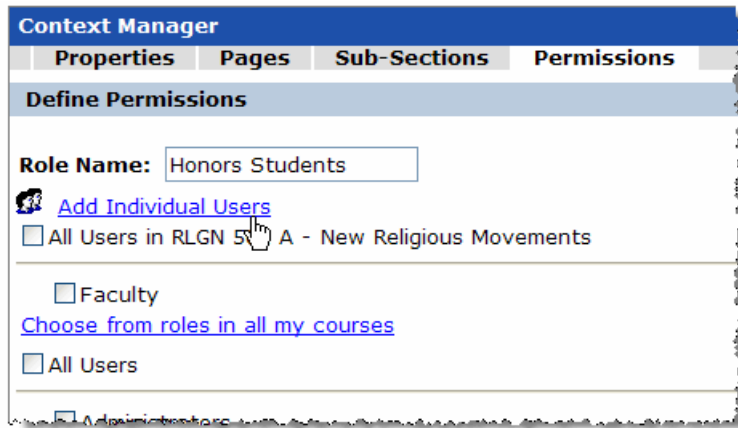
The system opens a new browser window titled **Select Users**.

    b   To add a user, select the person's name in the left-hand column and click **Add** to move it to the right-hand column, which is labeled **Selected Users**.

Note that you can use the search fields and/or the drop-down list to filter the names that show up in the left-hand column.

c   When you have added all the appropriate users to the **Selected Users** column, click **OK**. The system again displays the screen where you added the name for the new role.

d   Click **Save**.

Entering scores
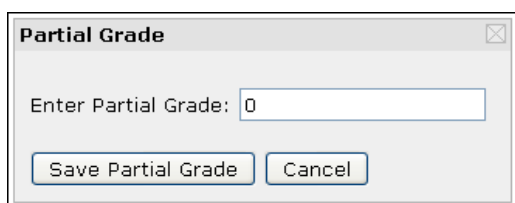
This section describes those guidelines for entering scores that are uniform throughout the Coursework and Gradebook portlets.

About the scoring icons

In some cases, you have the option of entering scores using the following icons:

Full credit — Clicking this gives the student the maximum point value defined for the question.

No credit — Clicking this gives the student zero points.

Partial credit, or a better-than-perfect score — Clicking this icon lets you enter any number of points that you think is appropriate.

When you select partial credit, the system displays the **Partial Grade** pop-up.

For details on values that can be entered in this pop-up, see "Values that can be entered," below. Afterward, click the **Save Partial Grade** button to save your entry.

Values that can be entered

In various places — including the **Partial Grade** pop-up and other screens — you have the ability to enter a grade into a text field. In these situations, you can enter any of the following:

- A point value, such as 10.

- A percentage, such as 50%.

- A letter grade, such as A.

- If you want to give full credit, the equal sign.

If you are entering a number, note that you can enter up to two decimal places.

If you enter a percentage or a letter grade, note that the system also generates a corresponding point value, and the point value will be the main value used to track the score. This is significant because if you enter an A, and you later increase the point value for whatever it is you have graded (the assignment or the question, for example), the student may no longer have an A. So just be aware that changing the point value after you have begun entering scores can bring about complications, regardless of how you entered the scores.

Working with feedback

This section explains guidelines for leaving personalized feedback for a particular student by typing in comments that will display on screen, or uploading a file. You can do this in either of the following places:

- In the Coursework portlet — on the Student Assignment Details screen for any assignment.

- In the Gradebook portlet — on the student's grade sheet.

The student will see your feedback that next time he or she navigates to the screen where the feedback was created.

Note that this differs slightly from the steps for entering feedback on a particular question on an online test. That process is described in .

Entering a comment

Use this procedure to type in comments for the student.

To leave a comment:

1   Navigate to the appropriate screen.

2   Click **Add a feedback comment**.

The system displays a pop-up editor.

3   Enter your comments.

4   Click **Save**.

The system saves your comments, and the student will see these when he or she next navigates to this screen. Your name and the time you left the comments will be displayed as well.
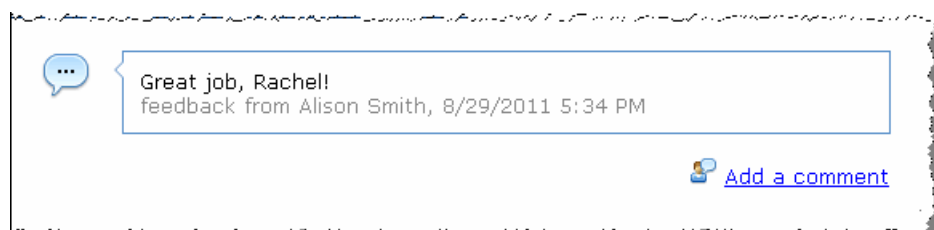
Other users authorized to view the Student Assignment Details screen will be able to see your comment but will not be able to modify them. (This differs from comments left in regard to a specific question on a test, which another authorized user — if one exists — could modify.)

Adding a file

If desired, you can upload a file for the student that contains your feedback or other details that you want the student to review. The student will be able to download this file from the same screen where you upload it.

To add a file:

1   Navigate to the appropriate screen.

2   Click **Add a feedback file**.

The system displays a pop-up.

3   Click the **Browse** button and follow the prompts in your browser to select a file.

4   If desired, enter a name in the **Label** column. If you do not enter a label, then the name of the file will be used as a label in the Student Assignment Details screen.

5   Click **Save**.

The system adds the file to the Student Assignment Details screen. The student will see the file when he or she next navigates to the Student Assignment Details screen for this assignment. Your name and the time you uploaded the file will be displayed as well.

Modifying or deleting feedback

After you add feedback, you may want to do any of the following:

•   Edit or delete the comments that are displayed on screen.

•   Delete a feedback file.

Note that you cannot edit a feedback file — if you need to change anything about a feedback file, you should delete the attachment and start over.

To modify or delete feedback:

1   Navigate to the appropriate screen.

2   Do one of the following:

- To delete either an on-screen comment or a file, click the corresponding trash-barrel icon.

The system will display a dialog asking if you are sure you want to delete the item. Click **OK**.

- To modify a comment, click the pencil icon to display a text editor with your comments. Make whatever changes are appropriate and click **Save**.

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