How to Use Canvas: Lesson 1 Outline

Basic Account Settings

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

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

Open Account Settings

To access your account settings:

1. Click the **Settings** link in the Account Navigation menu.
2. View the **Settings** tab. (This tab opens by default when you click the Settings link.)

Manage Account Settings

1 Account Settings

Account Name: `New Account`

Default Language: `Not set (defaults to English (US))`

This will override any browser/OS language settings. Preferred languages can still be set at the course/user level.

Default Time Zone: `Mountain Time (US & Canada) (-07:00/-0€`

Multi-Factor Authentication: `Disabled`

Allow Self-Enrollment: `Never`

Login Label: `ex: Login, Username, or Student ID`

Trusted HTTP Referers: `https://example.edu`

This is a comma separated list of URL's to trust. Trusting any URL's in this list will bypass the CSRF token when logging in to Canvas.

Default View for Dashboard: `Card View`

☐ Overwrite all users' existing default dashboard preferences

2
☐ Don't let teachers rename their courses
☐ Students can opt-in to receiving scores in email notifications
☐ Restrict students from viewing quiz questions after course end date
☑ Restrict students from accessing courses before start date
  ☐ Lock this setting for sub-accounts and courses
☐ Restrict students from viewing future courses in enrollments list
  ☐ Lock this setting for sub-accounts
☑ Restrict students from accessing courses after end date
  ☐ Lock this setting for sub-accounts and courses
☑ Disable comments on announcements
  ☐ Lock this setting for sub-accounts and courses
☐ Allow students to download course content and view offline

3 Canvas Cloud Information

- 🌐 http://documentation.instructure.com/

4 Quiz IP Address Filters ⓘ

Name: [   ]   Filter: [   ]   ✕

＋ Filter

5 Features

☑ Let sub-accounts use the Theme Editor to customize their own branding
☑ Open Registration
☑ Users can edit their name
☑ Users can delete their institution-assigned email address
☑ Show the email address of sender for user interaction Notifications
☐ Equella
☑ Analytics
☑ User Avatars
  ☑ Enable Gravatar

6 SIS Agent Token Authentication

This will allow you to authenticate Canvas for posting grades to SIS

SIS Agent Token: [   ]

SIS App URL: [   ]

7 Help menu options

Name `Help`

Icon ⓘ ⓘ 📁 ⚙ 🌐

Help menu links
Ask Your Instructor a Question	▲ ▼	🔗 🗑
Search the Canvas Guides	▲ ▼	🔗 🗑
Report a Problem	▲ ▼	🔗 🗑
Ask the Community	▲ ▼	🔗 🗑
Submit a Feature Idea	▲ ▼	🔗 🗑

＋ Link

8 Similarity Detection Platform

Similarity Pledge: students must check a box acknowledging that they agree with this pledge

Students can see originality score `Immediately`

9 Enabled Web Services

☑ Delicious
☑ Diigo
☑ Google Docs Preview ⓘ
☑ Google Drive
☑ LinkedIn
☑ Skype
☑ Twitter

10 Who Can Create New Courses

(Account Administrators can always create courses)
☑ Teachers
☐ Users with no enrollments
☐ Students

11 Update Settings

From the Settings tab, set the details for your account.

1. **Account Settings:** Specify settings for the entire account
2. **Restriction Settings:** Select course user restrictions for your account
3. **Canvas Cloud Information:** View your institution's Canvas URL
4. **Quiz IP Address Filters:** Create a predefined list of IP addresses or address ranges, making it easier for instructors to select a valid setting when creating a quiz
5. **Features:** Enable or disable specific built-in Canvas functionality. (Note: Speak with your Customer Success Team about other features that may not be listed here.)
6. **SIS Agent Token Authentication:** Configure your SIS to communicate with Canvas
7. **Help Menu Options:** Customize the Global Navigation Help link menu
8. **Similarity Detection Platform:** Manage your plagiarism LTI tool integrations
9. **Enabled Web Services:** Enable third-party integrations
10. **Who Can Create New Courses:** Specify which users can create new courses in your account
11. **Update Settings:** Save your settings

To learn more about account details, view [How do I set details for an account?](#)

Admin User Roles

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

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

View more information about [account level permissions](#).
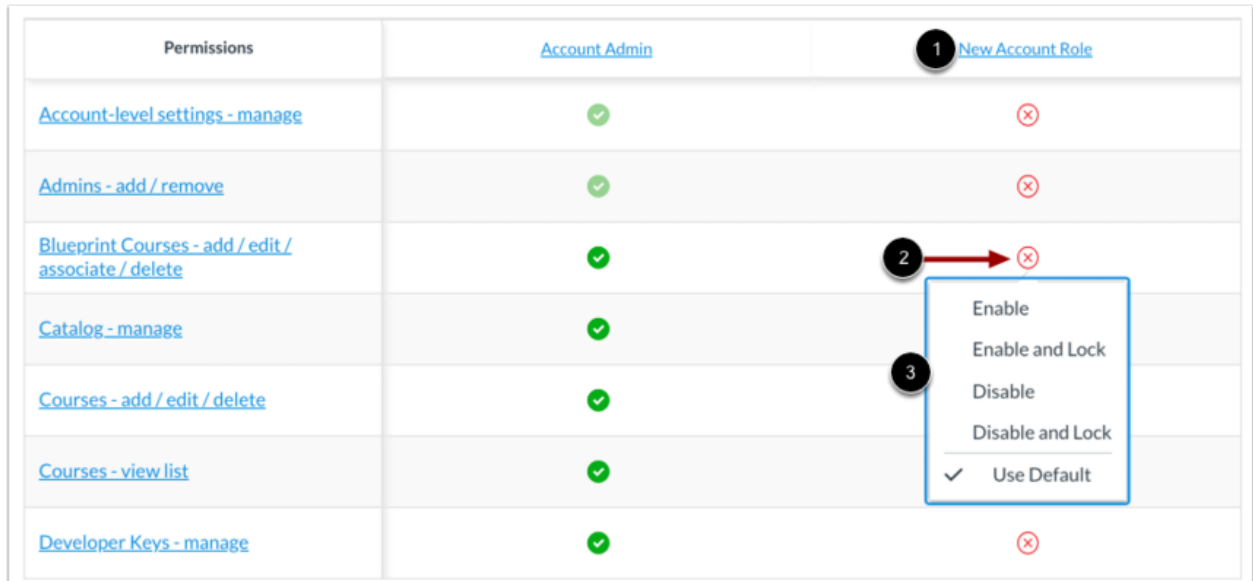
Add Account Role
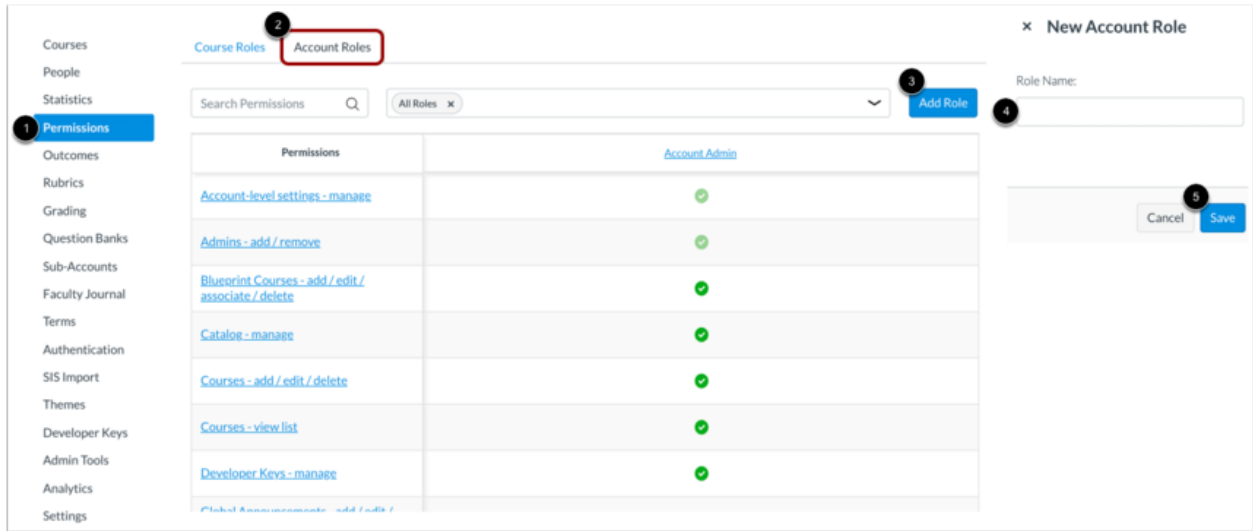
To add an account-level user role in your account:

1. Click the **Permissions** link in Account Navigation.
2. Click the **Account Roles** tab.
3. Click the **Add Role** button.
4. Type a name for the role in the **Role Name** field.
5. Click the **Save** button.

Manage Account Role Permissions

To adjust or manage permissions for account user roles:

1. Locate the user role on the Permissions page.

2. Click the icon next to the name of the permission.
3. Select an option from the permission menu for each account-level permission.

Learn more about setting permissions for account-level user roles.

Account Admins

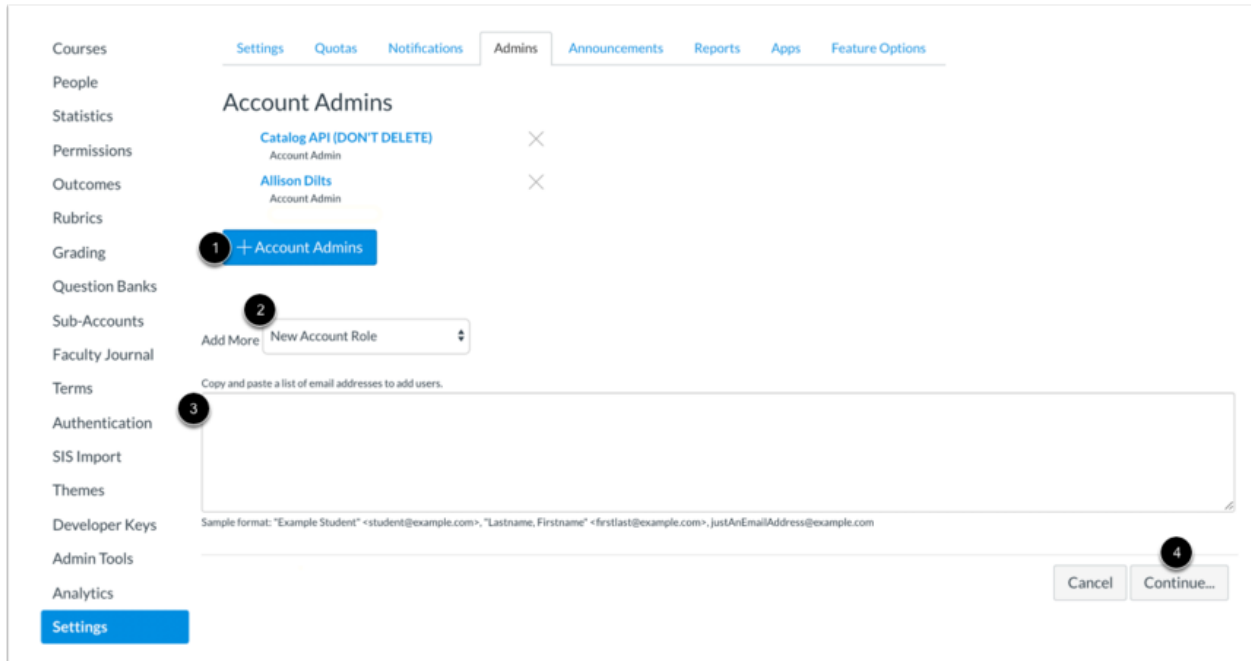Once you have created differentiated account-level user roles, you can add admins to your account.

View Admin Users

To view your account admins:

1. Click the **Settings** link in Account Navigation.
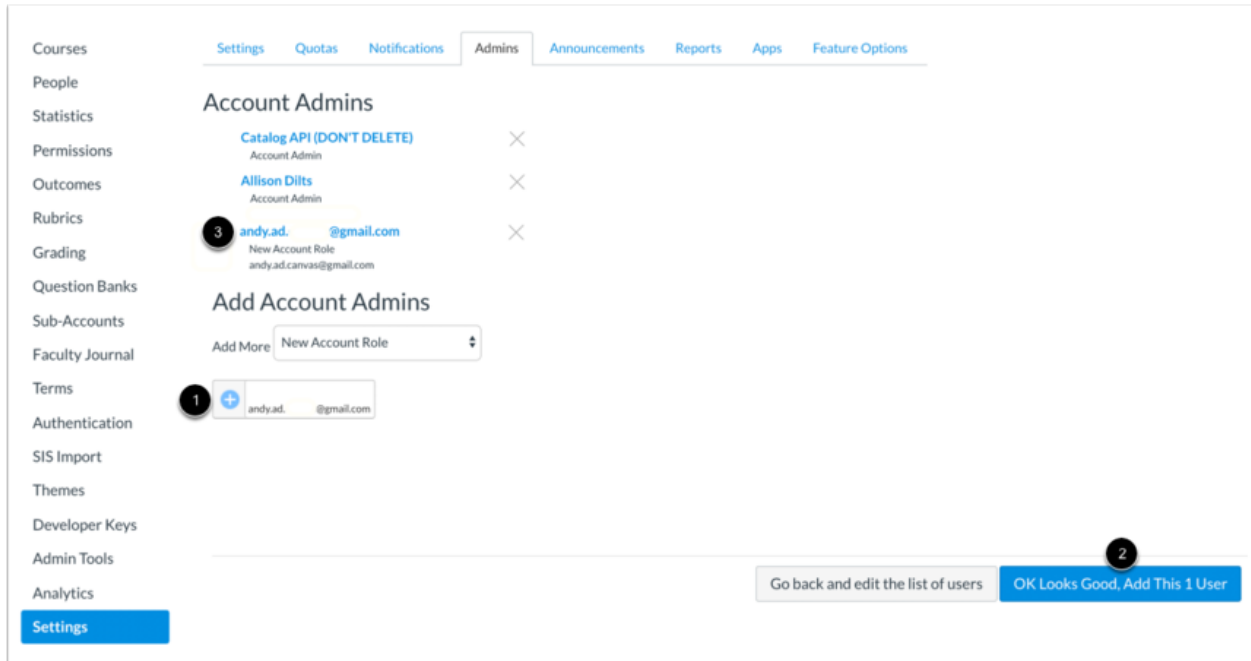2. Click the **Admins** tab.

Add New Admin

To add an admin to your account:

1. Click the **Add Account Admins** button.
2. Select a user role for the admin in the **Add More** drop-down menu.
3. Add the user's email address.
4. Click the **Continue** button.

Note: New admins can be bulk added to your Canvas account using the SIS Import tool.

Verify New Admin Users

Verify the admin user's details [1], then click the **OK Looks Good, Add This User** button [2].

View the user's information in the Account Admins list [3].

Structure Your Account

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

Most institutions organize sub-account structures to mirror their Student Information System (SIS) or registration system. For example, sub-accounts can be created for individual colleges within a university, or for schools within a district. Sub-accounts can also be created within sub-accounts, such as when a college subdivides into departments that subdivide into programs, or a school that subdivides into grade levels that subdivide into specific subjects.

Learn more about hierarchical structures in Canvas.

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

Add Sub-Accounts
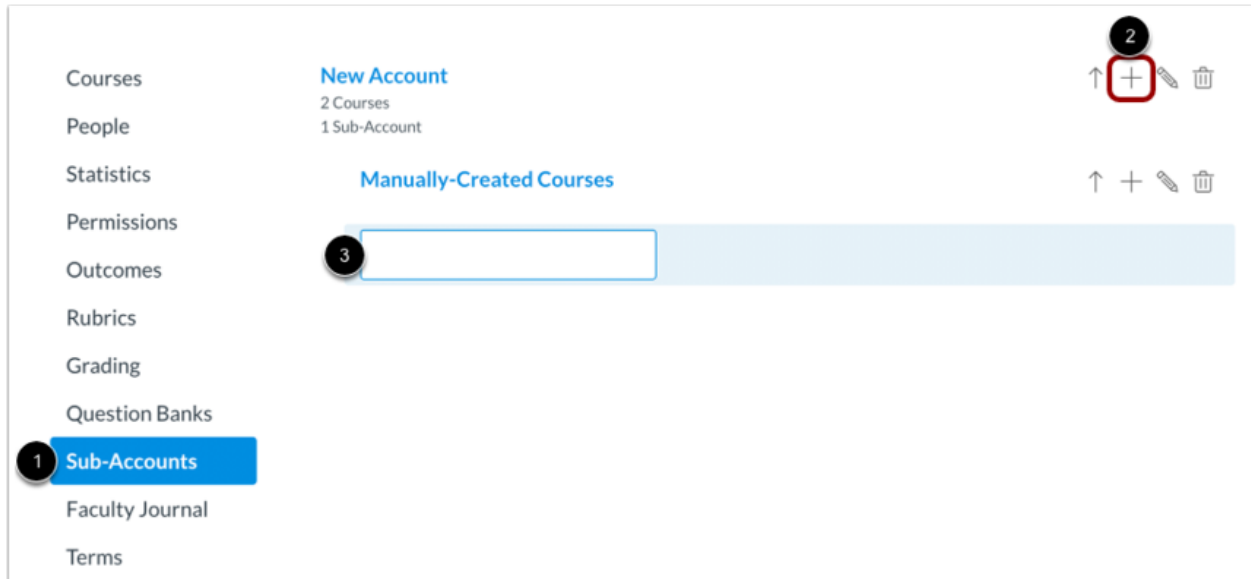
To add sub-accounts to your account:

1. Click the **Sub-Accounts** link in Account Navigation
2. Click the **Add** icon
3. Enter a name for your sub-account in the Name field
4. Press the Enter key (on a PC) or the Return key (on a Mac).

You can follow these same steps to add a sub-account to a sub-account. To add a sub-account under another sub-account, click the **Add** icon next to the name of the sub-account [4].

Note: You can bulk-create sub-accounts using the SIS Import tool.

Additional Resources

Check out these resources to help you become familiar with Canvas.

Canvas Guides

For more in-depth information about the topics covered in this chapter, check out the Canvas Admin Guide chapters on Settings, Roles and Permissions, and Accounts and Sub-Accounts.

You can also watch the Canvas Admin overview videos about Account Settings, Permissions, and Sub-Accounts.

Canvas Community

The [Canvas Community](#) is an online community of Canvas users from around the world. It houses a space for [Questions and Answers](#) about Canvas, and a variety of groups, including the [Canvas Administration group](#).

Up Next:

Now that your basic account settings are configured, you can learn how to [bulk upload data](#) for your account, or you can [add the information manually](#).

Chapter 2: Using the SIS Import Tool

SIS Import Tool

- Learn how to bulk upload data for your entire account using CSV uploads.

Chapter 3: Course Access and Grade Reporting

Terms:

- Terms define course start and end dates, and term access dates specify when users can access courses.
- If you created terms using the SIS Import Tool, you can learn about adjusting term access dates.

Grading Periods:

- Grading periods specify date ranges used for student grade reporting. You can also use grading periods to maintain your institution's post-term-end grade modification policies.