This session

• **For:** New users, support, admins

• **About:**
  - Changes that can be made to Sakai OOTB from a Support Admin role
  - Explain some of the one time setup tasks that you should undertake
  - Provide an explanation of permissions, realms, site and user templates.

*Sakai configurations to fit your environment once the integration coding has finished*
Configurations

• What types of users, worksites will you use?
• Do you want to limit tools based on types of worksites?
• Do you want to order tools in worksites consistently?
• What roles in different types of worksites? What permissions for each role?
• What will user My Workspaces contain?
Configurations – cont.

- MOTD
- What will your ‘Gateway’ site look like?
- Help
- Do you want user presence on?
- What is your policy regarding account creation?
- What are the defaults for certain tools?

_There are many settings that affect tools. You should decide if the defaults fit your needs._
Worksite Types

• Worksite type specified when worksite is created

![Worksite Setup](image)

Creating a new site

Choose the type of site you want to create. Only instructors can create official course websites. Instructors and students can create project websites. NOTE: Students, if you do not see a tab for your course, contact your instructor for information about when your official course website will be available.

- course website
  - Academic term: Fall 2007
- project website
- portfolio website

[Continue] [Cancel]
Worksite Types

- Other types are possible
  - project, course, GradToolsStudent, Research, ...
  - A type can be defined by using it
    - Create a site using Admin Sites tool and enter a type
Worksite Types

Sites

Search for Sites
Complete the form below to find specific sites.

Type of Site:
- Research
- PortfolioAdmin
- Project
- Any

Optional: Search for sites by site name (e.g. ECON 101) or project name.

Search for:

[Search for Sites]
Worksite Types

• To change the types presented in Worksite Setup when creating new sites, see sakai.sitesetup.xml in

```xml
<Worksite Setup>
  <Creating a new site>
    <Choose the type of site you want to create. Only instructors can create official course websites. Instructors and students can create project websites. NOTE: Students, if you do not see a tab for your course, contact your instructor for information about when your official course website will be available.>
    <course website>
      <Academic term: Fall 2007>
    </course website>
    <project website>
    </project website>
    <portfolio website>
  </Creating a new site>
</Worksite Setup>
```
sakai.sitesetup.xml

<?xml version="1.0"?>
<registration>
  <tool
    id="sakai.sitesetup"
    title="Worksite Setup"
    description="Modify your sites and create new ones.">
    <!-- types are seperated by , -->
    <!-- Steps for adding new site type: -->
    <!-- 1. add the site type into the following siteTypes value -->
    <!-- 2. add the site type as category into related tool reg files-->
    <!-- 3. if the site title is editable, add the site type into titleEditableSiteType in sakai.properties file -->
    <!-- 4. if specific tool order for the site type is needed, specify it inside toolOrder.xml file -->
  </tool>
  <!-- default site type -->
  <configuration name="defaultSiteType" value="project" />
  <!-- types of sites that can either be public or private -->
  <configuration name="publicChangeableSiteTypes" value="project" />
  <!-- types of sites that are always public -->
  <configuration name="publicSiteTypes" value="course" />
  <!-- types of sites that are always private -->
  <configuration name="privateSiteTypes" value="" />
  <configuration name="site_mode" value="sitesetup" type="final" />
  <category name="myworkspace" />
</tool>
</registration>
Worksite Setup

Creating a new site

Choose the type of site you want to create. Only instructors can create official course websites. Instructors and students can create project websites. NOTE: Students, if you do not see a tab for your course, contact your instructor for information about when your official course website will be available.

- course website
  - Academic term: Fall 2007
- project website
- portfolio website
- research website

Continue  Cancel
## Worksite Tools

Which tools can be chosen in a site?

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>For viewing recent announcements, discussion, and chat items.</td>
</tr>
<tr>
<td>Announcements</td>
<td>For posting current, time-critical information.</td>
</tr>
<tr>
<td>Assignments</td>
<td>For posting, submitting and grading assignment(s) online.</td>
</tr>
<tr>
<td>Blogger</td>
<td>A blogger</td>
</tr>
<tr>
<td>Chat Room</td>
<td>For real-time conversations in written form.</td>
</tr>
<tr>
<td>Drop Box</td>
<td>For private file sharing between instructor and student.</td>
</tr>
<tr>
<td>Email Archive</td>
<td>For viewing email sent to the site.</td>
</tr>
<tr>
<td>Evaluations</td>
<td>OSP Evaluations</td>
</tr>
<tr>
<td>Forms</td>
<td>Sakai Forms Tool</td>
</tr>
<tr>
<td>Forums</td>
<td>Display forums and topics of a particular site</td>
</tr>
</tbody>
</table>
Worksite Tools

• **Which tools can be chosen in a site?**
  • Specified in the tool’s registry file, i.e. sakai.membership.xml in
    sakai/site-manage/site-manage-tool/tool/src/webapp/tools
    svn: /svn/site-manage/trunk/site-manage-tool/tool/src/webapp/tools

    ```xml
    <?xml version="1.0"?>
    <registration>
    <tool
      id="sakai.membership"
      title="Membership"
      description="View and modify your membership in sites you may join.">
    <category name="myworkspace"/>
    <configuration name="reset.button" value="false" type="final"/>
    </tool>
    </registration>
    ```

    Membership tool is only in My Workspaces
Worksite Tools

/svn/content/trunk/content-

tool/tool/src/webapp/tools/sakai.resources.xml

<?xml version="1.0" ?>
<registration>
<tool id="sakai.resources" title="Resources" description="For posting documents, URLs to other websites">
<configuration name="home" value="" />
<configuration name="optional_properties" value="true" />
<configuration name="user_sees_all_their_sites" value="true" />
<configuration name="collections_per_page" value="50" />
<configuration name="resources_mode" value="resources" type="final" />
<category name="course" />  
<category name="project" /> 
<category name="portfolio" />  
<category name="myworkspace" />
</tool>
</registration>

Resource tool is in all site types
Worksite Tools

Additional control via stealthTools property

• Trumps the category_name values

Default (includes a long list of tools, including osp tools):
stealthTools@org.sakaiproject.api.kernel.tool.ActiveToolManager=
sakai.su, sakai.site.roster, sakai.rwiki, sakai.assignment

SU, Roster, Rwiki Assignments (w/o grades) tools won’t show up regardless of what’s in their xml files

Override in sakai.properties
stealthTools@org.sakaiproject.api.kernel.tool.ActiveToolManager=
sakai.su, sakai.site.roster, sakai.assignment

Wiki tool shows up according to what is defined in sakai.rwiki.xml category_name values
Worksite Tools

From the 2.5 sakai.properties file

# STEALTH TOOLS. A stealth tool is a tool that is running in Sakai, but is not available to be added to a site in Worksite Setup.

# stealthTools@org.sakaiproject.tool.api.ActiveToolManager = sakai.assignment,

stealthTools@org.sakaiproject.tool.api.ActiveToolManager=sakai.assignment
Worksite Tools

• Additional configuration options as of 2.3
  Easier control of stealthed provisional tools that ship with Sakai

In sakai.properties, use

# make specified tools visible to users when creating/editing site
visibleTools@org.sakaiproject.tool.api.ActiveToolManager=

# hide specified tools from users when creating/editing site
hiddenTools@org.sakaiproject.tool.api.ActiveToolManager=
Worksite Tools

- So, which tools can be added to a particular type of worksite is controlled by entries in the tool’s `<tool>.xml` file and `sakai.properties`.

What order are the tools displayed?
Tools in Worksites – controlling the order

• We are really talking about the order of Pages
  • The left hand menu column contains page names
  • Though typically (so far) Sakai has one tool per page, more are possible (e.g., Home page)

• Page ordering in a site type can be optionally controlled using the toolOrder.xml file

Also – pageOrder helper/tool
Tools in Worksites – controlling the order

• `toolOrder.xml` goes in the Sakai Home folder
  e.g., sakai folder in tomcat root folder
  `/usr/local/tomcat/sakai`

• Default as delivered in Sakai
  `/svn/component/trunk/component-api/component/src/config/
  org/sakaiproject/config/toolOrder.xml`

`toolOrder.xml`
Tools in Worksites — controlling the order

**toolOrder.xml**

```xml
<category name="course">
  <tool id="sakai.iframe.site" />
  <tool id="sakai.synoptic.chat" />
  <tool id="sakai.synoptic.discussion" />
  <tool id="sakai.synoptic.announcement" />
  <tool id="home" selected="true" />
  <tool id="sakai.syllabus" />
  <tool id="sakai.schedule" />
  <tool id="sakai.announcements" selected="true" />
  <tool id="sakai.resources" />
  <tool id="sakai.discussion" />
  <tool id="sakai.assignment" />
  <tool id="sakai.assignment.grades" />
  <tool id="sakai.samigo" />
  <tool id="sakai.gradebook.tool" />
  <tool id="sakai.dropbox" />
  <tool id="sakai.chat" />
  <tool id="sakai.rwiki" />
  <tool id="sakai.mailbox" />
  <tool id="sakai.news" />
  <tool id="sakai.iframe" />
  <tool id="sakai.presentation" />
  <tool id="sakai.sections" />
  <tool id="sakai.site.roster" />
  <tool id="sakai.siteinfo" required="true" />
</category>
```

- Doesn’t control which tools appear
- If no entry for a worksite type, alpha order
- Any page that has a tool in the list will be placed in the order set by the list.
- If the page has multiple tools, it will be ordered with the first one in this list.
toolOrder.xml

<?xml version="1.0"?>
<toolOrder>
    <category name="course">
        <tool id="sakai.synoptic.chat" />
        <tool id="sakai.synoptic.discussion" />
        <tool id="sakai.announcements" selected = "true" />
        ....
        <tool id="sakai.mailbox" />
        <tool id="sakai.news" />
        <tool id="sakai.iframe" />
        <tool id="ctools.reserves" />
        <tool id="sakai.siteinfo" required = "true" />
        <tool id="sakai.contact.support" />
    </category>
</toolOrder>
Tools in Worksites – controlling the order

• If no toolOrder.xml file
  • Existing order isn’t changed
  • Tools added to site get added to end of list
• If Home or Site Info are added, they are added at the top and bottom
• If Home or Site Info is already in the site, their position isn’t changed
Tools in Worksites – controlling the order

- PageOrder tool – contrib in 2.3, base release in 2.4
  subversion: /site-manage/trunk/pageorder

Stealth the sakai-site-pageorder-helper to hide Page Order item
Also, can turn off Import from File with site.setup.import.file = false
Tools in Worksites – controlling the order
Tools in Worksites – controlling the order

• Once a site has been edited with pageOrder, its order is maintained through Site Info > Edit Tool operations
  Otherwise, changes made to page order (via the Admin Sites tool for example) are reverted after a Site Info > Edit Tools
Worksite Tools

• We’ve specified
  • Types of worksites in our installation
    • To add a new type of site
      Edit sitesetup.xml to add the site type
  • What tools show up in the list when adding tools to a worksite
    • Edit the tool registration file to let Worksite Setup know to present that tool for selection
    • Remember the stealthTool related settings in sakai.properties
  • The order of tools in the different types of worksites
    • Edit the toolOrder.xml file to place the tool in the left hand menu

• Still more to do before logging in
General configuration settings

• General configuration used by tools
  • Defaults set in
    • Tool components.xml files
    • sakai.properties
      svn: /svn/component/trunk/component-api/component/src/
        config/org/sakaiproject/config/sakai.properties
  • Override with settings in
    <sakai.home>/sakai.properties
      e.g. /usr/local/tomcat/sakai/sakai.properties
General configuration settings

components.xml  (snippet from /svn/email/trunk/email-impl/pack/src/webapp/WEB-INF/components.xml)

<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE beans PUBLIC "-//SPRING//DTD BEAN//EN" "http://www.springkernel.org/dtd/spring-beans.dtd">
<beans>
  <bean id="org.sakaiproject.email.api.EmailService"
       class="org.sakaiproject.email.impl.BasicEmailService"
       init-method="init"
       destroy-method="destroy"
       singleton="true">
    <lookup-method name="serverConfigurationService"
                   bean="org.sakaiproject.component.api.ServerConfigurationService"/>
    <property name="smtp"><null/></property>
    <property name="smtpPort"><null/></property>
    <property name="smtpFrom"><null/></property>
    <property name="maxRecipients"><value>100</value></property>
    <property name="oneMessagePerConnection"><value>false</value></property>
    <property name="testMode"><value>false</value></property>
  </bean>
</beans>
Override components.xml settings

• In sakai.properties, to override a component property

Form a key: property @ bean = value

Default setting: property @ bean = value

```xml
<bean id="org.sakaiproject.service.framework.email.EmailService"
    class="org.sakaiproject.component.framework.email.BasicEmailService"
    init-method="init"
    destroy-method="destroy"
    singleton="true">
    <property name="smtp"><null/></property>
    ....
</bean>
```

To override:

```
smtpl@org.sakaiproject.service.framework.email.EmailService=214.233.26.119
    (put in the sakai.properties file)
```
• Tool configuration via properties

Assign a value to the property

Default values:
version.service=sakai_2-5-0
version.sakai=sakai_2-5-0
display.users.present=true

To override (put these in the sakai.properties file):
version.service=Yardstick 1.0
version.sakai=2.5
display.users.present=false
sakai.properties

• Multiple configuration files supported
  • sakai.properties
  • local.properties (if present, overrides sakai.properties)
  • security.properties

Documents in the Sakai Development site Resources and svn: svn/reference/trunk/docs/architecture
  (https://source.sakaiproject.org/svn/reference/trunk/docs/architecture)

How to Configure Sakai
  Resources/Architecture Docs/Sakai 2/Sakai Configuration

Sakai Properties
  Resources/Architecture Docs/Sakai 2/Sakai Properties
sakai.properties

The sakai.properties ‘kernal’ file as delivered with default settings is at https://source.sakaiproject.org/svn/component/trunk/component-api/component/src/config/org/sakaiproject/config/sakai.properties in subversion.

A sample sakai.properties file which self-documents many of the standard properties in comments can be found in subversion at https://source.sakaiproject.org/svn/reference/trunk/docs/sakai.properties

The sakai.property file that is used for the ‘demo’ version of Sakai, and which builds on/overrides properties set in the ‘kernal’ version is at https://source.sakaiproject.org/svn/reference/trunk/demo/sakai.properties

Another version of sakai.properties that is used on QA servers is at https://source.sakaiproject.org/contrib/qa/trunk/sakai.properties
Use `sakai.properties` to set:

- Email
- Support, help email addresses
- Help on/off
- Presence
- ‘Affiliate’ participants
- Active/Inactive user control
- Edit site title control
- `Course, Subject, Section field size` (now set in db table `cm_academic_session_t`)

- Footer links
- Server name, URL
- Login fields
- Footer copyright notice, links
- Skins
- Resource copyright notices
- Semester labels and dates
### Examples

#### cm_academic_session_t

<table>
<thead>
<tr>
<th>ACADEMIC_SESSION_ID</th>
<th>VERSION</th>
<th>LAST_MODIFIED_BY</th>
<th>LAST_MODIFIED_DATE</th>
<th>CREATE_D_BY</th>
<th>CREATE_D_DATE</th>
<th>ENTERPRISE_ID</th>
<th>TITLE</th>
<th>DESCRIPTION</th>
<th>START_DATE</th>
<th>END_DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>admin</td>
<td>5/9/07</td>
<td>admin</td>
<td>5/9/07</td>
<td></td>
<td>FALL 2003</td>
<td>F03</td>
<td>9/1/03</td>
<td>12/1/03</td>
</tr>
<tr>
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<td>1</td>
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<td>5/9/07</td>
<td>admin</td>
<td>5/9/07</td>
<td></td>
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<td>W04</td>
<td>1/1/04</td>
<td>5/1/04</td>
</tr>
<tr>
<td>2</td>
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<td>5/9/07</td>
<td>admin</td>
<td>5/9/07</td>
<td></td>
<td>SPRING 2004</td>
<td>Sp04</td>
<td>5/1/04</td>
<td>8/1/04</td>
</tr>
<tr>
<td>3</td>
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<td>admin</td>
<td>5/9/07</td>
<td>admin</td>
<td>5/9/07</td>
<td></td>
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<td>Su04</td>
<td>8/1/04</td>
<td>8/1/04</td>
</tr>
<tr>
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<td>admin</td>
<td>5/9/07</td>
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<td>SUMMER 2004</td>
<td>Su04</td>
<td>8/1/04</td>
<td>8/1/04</td>
</tr>
<tr>
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<td>1</td>
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<td>5/9/07</td>
<td>admin</td>
<td>5/9/07</td>
<td></td>
<td>FALL 2004</td>
<td>F04</td>
<td>9/1/04</td>
<td>12/1/04</td>
</tr>
<tr>
<td>6</td>
<td>1</td>
<td>admin</td>
<td>5/9/07</td>
<td>admin</td>
<td>5/9/07</td>
<td></td>
<td>WINTER 2005</td>
<td>W05</td>
<td>1/1/05</td>
<td>5/1/05</td>
</tr>
<tr>
<td>7</td>
<td>1</td>
<td>admin</td>
<td>5/9/07</td>
<td>admin</td>
<td>5/9/07</td>
<td></td>
<td>SPRING 2005</td>
<td>Sp05</td>
<td>5/1/05</td>
<td>8/1/05</td>
</tr>
<tr>
<td>8</td>
<td>1</td>
<td>admin</td>
<td>5/9/07</td>
<td>admin</td>
<td>5/9/07</td>
<td></td>
<td>SPRING_SUMMER 2005</td>
<td>SpSu05</td>
<td>8/1/05</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>1</td>
<td>admin</td>
<td>5/9/07</td>
<td>admin</td>
<td>5/9/07</td>
<td></td>
<td>SUMMER 2005</td>
<td>Su05</td>
<td>8/1/05</td>
<td>8/1/05</td>
</tr>
</tbody>
</table>

Other references

• [http://jira.sakaiproject.org/jira/browse/SAK-8315](http://jira.sakaiproject.org/jira/browse/SAK-8315) - More flexible handling of properties files

• [http://jira.sakaiproject.org/jira/browse/SAK-12236](http://jira.sakaiproject.org/jira/browse/SAK-12236) - Full support for properties managed outside the file system

• [http://jira.sakaiproject.org/jira/browse/SAK-12237](http://jira.sakaiproject.org/jira/browse/SAK-12237) - Local configuration of complex objects
Admin Configurations

Now it’s time to login!
Additional configurations done as Admin user
Admin configurations

• Default Roles and Permissions (realms)
• User types (different from role in a site)
• My Workspace default tools
• Gateway tools
• MOTD
• Miscellaneous configurations
Worksite type default roles, permissions

• A site when created inherits a realm template
• Use the Admin Realm tool to edit realms
• Worksites get
  • !site.template.<type>
    Where <type> is the worksite type (e.g., course, project)
  • !site.template
    For untyped worksites, or worksites without a corresponding !site.template.<type>
Worksite type default roles, permissions

• A site’s default roles are inherited from the associated realm template

  !site.template
  access
  maintain

  !site.template.course
  Instructor
  Student
  Teaching Assistant

• The realm also specifies the site creator’s role

  Defaults are maintain, Instructor
Worksite type default roles, permissions

<table>
<thead>
<tr>
<th>Realm Id</th>
<th>Provider Id</th>
<th>Maintain Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>!group.template</td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td>!group.template.course</td>
<td></td>
<td>Instructor</td>
</tr>
<tr>
<td>!group.template.portfolio</td>
<td></td>
<td>CIG Coordinator</td>
</tr>
<tr>
<td>!pubview</td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td>!site.helper</td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td>!site.template</td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td>!site.template.course</td>
<td></td>
<td>Instructor</td>
</tr>
<tr>
<td>!site.template.portfolio</td>
<td></td>
<td>CIG Coordinator</td>
</tr>
</tbody>
</table>
Worksite type default roles, permissions

These are the Realms defined within the system that meet the search criteria. Click on an Id to edit.

<table>
<thead>
<tr>
<th>Realm Id</th>
<th>Provider Id</th>
<th>Mainta</th>
</tr>
</thead>
<tbody>
<tr>
<td>lpubview</td>
<td></td>
<td></td>
</tr>
<tr>
<td>lsite.helper</td>
<td></td>
<td></td>
</tr>
<tr>
<td>lsite.template</td>
<td></td>
<td></td>
</tr>
<tr>
<td>lsite.template.CTN-G-MyWorkspace</td>
<td></td>
<td>Owner</td>
</tr>
<tr>
<td>lsite.template.CTN-course</td>
<td></td>
<td>Owner</td>
</tr>
<tr>
<td>lsite.template.CTN-project</td>
<td></td>
<td>Owner</td>
</tr>
<tr>
<td>lsite.template.GradToolsDepartment</td>
<td></td>
<td>Staff</td>
</tr>
<tr>
<td>lsite.template.GradToolsRackham</td>
<td></td>
<td>Staff</td>
</tr>
<tr>
<td>lsite.template.GradToolsStudent</td>
<td></td>
<td>Owner</td>
</tr>
<tr>
<td>lsite.template.course</td>
<td></td>
<td>Owner</td>
</tr>
<tr>
<td>lsite.template.myworkspace</td>
<td></td>
<td>Owner</td>
</tr>
<tr>
<td>lsite.template.project</td>
<td></td>
<td>Owner</td>
</tr>
</tbody>
</table>

UM CTools
Worksite type default roles, permissions

• Example - UM
  • !site.template.project
    Owner
    Organizer
    Member
    Observer
  • !site.template.course
    Owner
    Instructor
    Assistant
    Student
    Observer
    Affiliate

• Issues associated with different sets of roles
• Implications with externally provided users (Registrar)
Worksite type default roles, permissions

- Group templates, permissions

<table>
<thead>
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<td>!group.template</td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td>!group.template.course</td>
<td></td>
<td>Instructor</td>
</tr>
<tr>
<td>!group.template.portfolio</td>
<td></td>
<td>CG Coordinator</td>
</tr>
<tr>
<td>!lupview</td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td>!site.helper</td>
<td></td>
<td>Instructor</td>
</tr>
<tr>
<td>!site.template</td>
<td></td>
<td>Instructor</td>
</tr>
<tr>
<td>!site.template.course</td>
<td></td>
<td>CG Coordinator</td>
</tr>
<tr>
<td>!site.template.portfolio</td>
<td></td>
<td>CG Coordinator</td>
</tr>
</tbody>
</table>
Groups

- Group template should have same roles
- Same inheritance mechanism
e.g. !group.template.course

- Permissions for group aware tools only
Groups

- Groups created in Site Info

Site Info

Edit Site Information | Edit Tools | Add Participants | Manage Groups | Manage Access | Page Order

Grant 123
Site Description:
Site Contact and email: Sakai Administrator
Available to:
Site owner and group members

Site Info

Create New Group
Select members of the site member list and add to group. Select members of group list and remove. Click Update to save changes.

- Title
  Description

Membership

Site Member List
Add to group
Administrator, Sakai (admin)
assistant, jl (jlestat)
instructor, jl (jlinst)
Student2, jl (jstu2)
Student3, jl (jstu3)

Group Member List
Remove
student, jl (jstu)
Student1, jl (jstu1)
Worksite type default roles, permissions

- Each role has a set of permissions

These are all the permissions that can be set in all the Permission pages of tools (and then some)
Worksite type default roles, permissions

Review

• Create !site.template, !group.template realms to match worksite types (if you want to)
  • Easiest to copy an existing realm to a new one

• Define roles in the !site.templates
  • Easiest to copy an existing role to a new one
  • Add the role description

• Define default permissions for each role
Worksite type default roles, permissions

- Keep a master list of your settings

<table>
<thead>
<tr>
<th>10/14/04 CTools</th>
<th>2.0.8</th>
<th>Assistant</th>
<th>Instructor</th>
<th>Member</th>
<th>Student</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>alass.add</td>
<td></td>
<td></td>
<td>alass.add</td>
<td></td>
<td>alass.add</td>
<td></td>
</tr>
<tr>
<td>alias.del</td>
<td></td>
<td></td>
<td>alias.del</td>
<td></td>
<td>alias.del</td>
<td></td>
</tr>
<tr>
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<td></td>
<td>alias.upd</td>
<td></td>
<td>alias.upd</td>
<td></td>
</tr>
<tr>
<td>aunc.delete.any</td>
<td></td>
<td></td>
<td>aunc.delete.any</td>
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<td>aunc.delete.any</td>
<td></td>
</tr>
<tr>
<td>aunc.delete.own</td>
<td></td>
<td></td>
<td>aunc.delete.own</td>
<td></td>
<td>aunc.delete.own</td>
<td></td>
</tr>
<tr>
<td>aunc.new</td>
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<td>aunc.new</td>
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<td>aunc.new</td>
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<tr>
<td>aunc.read</td>
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<td>aunc.read</td>
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<td>aunc.read</td>
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<tr>
<td>aunc.read/drafts</td>
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<td>aunc.read/drafts</td>
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<td>aunc.read/drafts</td>
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<tr>
<td>aunc.revise.any</td>
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<td>aunc.revise.any</td>
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<td>aunc.revise.any</td>
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<td>aunc.revise.own</td>
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<td>aunc.revise.own</td>
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<td>aunc.revise.own</td>
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<td>calendar.import</td>
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<td>calendar.new</td>
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<td>calendar.revise</td>
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<td>calendar.revise</td>
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<td>chat.delete.any</td>
<td></td>
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<td>chat.delete.any</td>
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<td>chat.delete.any</td>
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<td>chat.delete.own</td>
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<td>chat.new</td>
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<td>chat.new</td>
<td></td>
</tr>
</tbody>
</table>

Sakai

July 2009

10th Sakai Conference - Boston, MA, U.S.A.
Helper realm

• Another way to influence role permissions
• Add a permission setting to a role in all existing sites that contain that role
• !site.helper realm
  • !site.helper realm permission settings are added to corresponding roles in realms of all sites
  • Can be used to add new permission settings to roles in old sites
## Helper realm

### Permissions settings for Instructor role in site and helper realms

<table>
<thead>
<tr>
<th>/site/1123342-334</th>
<th>!site.helper</th>
</tr>
</thead>
<tbody>
<tr>
<td>tool.perm1</td>
<td>✔</td>
</tr>
<tr>
<td>tool.perm2</td>
<td>□</td>
</tr>
<tr>
<td>tool.perm3</td>
<td>□</td>
</tr>
<tr>
<td>tool.perm4</td>
<td>✔</td>
</tr>
<tr>
<td>tool.perm5</td>
<td>□</td>
</tr>
</tbody>
</table>

### Resultant permissions for Instructor role in site 1123342-335

- ✔
- ✔
- □
- ✔
- ✔

### Examples –

- *asn.grade* permission added
- Gradebook permissions in 2.0

**Note!**
User types

• Users can have types
  • Scope is the installation
  • These are different from Roles scoped in a site

• Users (accounts) get realms from
  • !user.template.<type>
    Where <type> is the account type (e.g., guest, registered)
  • !user.template
    For untyped accounts, or accounts without a corresponding !user.template.<type>
User types

Admin User tool – creating a new user
User types

New Account

Enter the following information to create a new account.

* User Id
  First Name
  Last Name
  Email
* Create New Password
* Verify New Password
  Type: registered

Create Account  Cancel
User types

These are the Realms defined within the system that meet the search criteria. Click on an Id to edit.

You are viewing 1 - 5 of 5 results.

<table>
<thead>
<tr>
<th>Realm Id</th>
<th>Provider Id</th>
<th>Maintain Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>!user.template</td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td>!user.template.guest</td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td>!user.template.maintain</td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td>!user.template.registered</td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td>!user.template.sample</td>
<td></td>
<td>maintain</td>
</tr>
</tbody>
</table>
# User types

## UM CTools

- **Realm Id**
- **Provider Id**
- **Maintain Role**

<table>
<thead>
<tr>
<th>Realm Id</th>
<th>Provider Id</th>
<th>Maintain Role</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>luser.template</code></td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td><code>luser.template.colleague</code></td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td><code>luser.template.friend</code></td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td><code>luser.template.guest</code></td>
<td></td>
<td>maintain</td>
</tr>
<tr>
<td><code>luser.template.uniqname</code></td>
<td></td>
<td>maintain</td>
</tr>
</tbody>
</table>
User types

• !user.templates are realms – they have roles
• It is the .auth role for a !user.template that controls the account’s rights in the application scope

• site.add permission in the .auth role controls whether the account can create new worksites or not
User types

Sakai OOTB - .auth role

!user.template       ☐ site.add
!user.template.guest ☐ site.add
!user.template.maintain ☑ site.add
!user.template.registered ☑ site.add
!user.template.sample  ☑ site.add
### User types

Example: UM CTools - .auth role

<table>
<thead>
<tr>
<th>User Template</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>!user.template</td>
<td>□ site.add</td>
</tr>
<tr>
<td>!user.template.friend</td>
<td>□ site.add</td>
</tr>
<tr>
<td>!user.template.guest</td>
<td>□ site.add</td>
</tr>
<tr>
<td>!user.template.colleague</td>
<td>✔ site.add</td>
</tr>
<tr>
<td>!user.template.uniqname</td>
<td>✔ site.add</td>
</tr>
</tbody>
</table>
The User My Workspace

• When a user first logs in, their My Workspace is created

• The My Workspace pages/tools an account has is determined by the account type

• A site template is used to define the pages/tools
  • Users (accounts) get a My Workspace based on
    !user.<type>
    Where <type> is the account type (e.g., guest, registered)
    !user
    For untyped accounts, or accounts without a corresponding
    !user.<type> template
The User My Workspace

- Use `!user.<type>` templates if you want different types of users to have different My Workspace pages/tools.
The User My Workspace

- Use the Admin Site tool to edit/create !user.<type> templates

Easiest to copy !user to !user.sometype
The User My Workspace

• Example – UM

!user.uniqname

Home
Worksite Setup
Site Browser
Membership
Schedule
Announcements
Resources
UM Webmail
Teaching Questionnaires
News
Web Content
Preferences
My Profile

!user.guest

Home
Worksite Setup
Site Browser
Membership
Schedule
Announcements
Resources
News
Web Content
Preferences
My Profile
The My Workspace realm - !site.user

• Generally a user will be maintain role in their own My Workspace, and have full permissions on tools there

dropbox.maintain – check this if a user is having problems with dropboxes in course sites
User accounts, my workspaces

Review

We’ve decided on site and account types,
Defined default roles and permissions in sites,
Specified who can add new sites,
Decided on what pages/tools show up

A few other configurations

• Gateway page
• MOTD
• Welcome Message
• The Gateway site

Welcome

About
Features
Sites
Training
Acknowledgments
New Account
Help

Message of the day
There are currently no messages at this location.

Welcome!

Welcome to Sakai

Welcome to the Sakai Demo. The Demo configuration was created as a way to let you get an instance of Sakai up and running quickly and easily. For more information about installing a Sakai solution appropriate for production needs please read the readme files, and visit the Sakai website at sakaiproject.org, and the Sakai Developer's site at collab.sakaiproject.org.
Gateway Page

- Edit the !gateway site
  - Create a MOTD
  - Edit the Welcome message
  - Edit the info files (About, Training, etc.)
- Admin Sites tool to edit pages/tools
  - Remove the New Account tool?
Gateway Page

• Create a MOTD
  • In the Admin site – create a MOTD using the tool on the admin’s MOTD page
    • This tool is a specially configured Announcement tool (sakai.announcement) that creates announcements on the channel = /announcement/channel/!site/motd

• The Message of the Day tool (sakai.motd) on the gateway site – special display tool to view the motd
  • sakai.motd displays the announcement channel
    /announcement/channel/!site/motd
Gateway Page

- Announcement tool configuration for displaying the motd on the gateway page

```
Tool Configuration
Title: Message of the day
LayoutHints: (row, col 0 based):

Configuration
show-subject: false
items: 1
channel: /ment/channel/!site/motd
show-newlines: true
length: 50000
days: 1000

Continue Editing
Done
```

/announcement/channel/!site/motd
Gateway Page

- Edit the Welcome message
  - The Welcome message is displayed in a Web Content tool (sakai.iframe.service) specially configured (a clone of sakai.iframe)

- Displays the content at
  /library/content/server_info.html

Other information files...
Information files

- Displayed by various iframe tools

**Web Content** (sakai.iframe)
  
  webcontent.instructions.url = /library/content/webcontent_instructions.html
  
  Instructions that appear when URL is blank in Web Content tool

**My Workspace Information Display** (sakai.iframe.myworkspace)
  
  myworkspace.info.url = /library/content/myworkspace_info.html
  
  A message for My Workspaces (tool in the !user template)

**Service Information Display** (sakai.iframe.service)
  
  server.info.url = /library/content/server_info.html
  
  Welcome message on gateway

**Site Information Display** (sakai.iframe.site)
  
  Displays the description in a site – Worksite Info tool on site Home page

Also, while were talking about library files
  
  webdav.instructions.url = /library/content/webdav_instructions.html
Information behind Gateway pages should be customized to your installation, tools.

Features

Sakai offers a variety of features for use in course and project sites, including:

- **Home**: View recent announcements, discussions, and chat activity.
- **Announcements**: Post current, time-critical information.
- **Assignments**: Post assignments and receive submissions online.
- **Chat Room**: Participate in real-time conversations.
- **Discussion**: Engage in written discussions.
- **Drop Box**: Allow private file-sharing.
- **Email Archive**: Maintain an archive of email communications.
- **Gradebook**: Compute and store grades.
- **Help**: Access help documents.
Information Files

• To edit them,
  • Edit the source – (not recommended)
    Files in:
    • /reference/trunk/library/src/webapp/content
    • sakai\reference\library\src\webapp\content\gateway

• Or, create new files in Admin’s Resources
  • Put them in public, public/gateway
  • Override default locations by adding new URLs in sakai.properties, e.g.

    server.info.url = /content/public/the_server_info.html

    myworkspace.info.url = http://someserver.org/somepath/somefile.html
Gateway Page

- `/content/public/server_info.html` in the Admin’s Resources/public folder
Gateway Page

- Gateway page is setup
  - Pages and tools on the page in the left hand menu column have been specified
  - MOTD and Welcome message have been edited
Review

• New instance setups
  • !user.template.registered ⇒ !user.template.<types>
    Change site.add permission based on account type to control who can add new sites

  • Add institutional roles to !site.template
    !site.template ⇒ !site.template.<sitetypes>
    Add Roles, adjust permissions

  • Edit roles, permissions in !group.templates

• Upload files to Admin’s Resources/public folder
  • Local server_info, training, features, about, webcontent, error page...
  • Edit !gateway site to use WebContent tools pointed to these files
  • Edit !error site to point to error page
Review

• New instance setups, cont.
  • !user site template ➔ !user.<accounttype>
    Edit tools as needed in these My Workspace templates (e.g., institutional webmail)
  • Add tools to !admin site (e.g., Become User tool)
  • Add MOTD
  • Edit !admin realm to add admin users
Review

• New instance setups, cont.
  • sakai.properties
    Decide on toolset
    Change stealthTools, or
    visibleTools@org.sakaiproject.tool.api.ActiveToolManager
    hiddenTools@org.sakaiproject.tool.api.ActiveToolManager
Configuring Sakai

(additional info follows)

John Leasia
jleasia@umich.edu
Still more...

• Other things to think about
  • Skins
    • see document
      Subversion:
        trunk/sakai/docs/architecture/sakai_skin_portal.doc
      Collab site:
        Skin docs in ‘Resources: architecture docs/sakai 2’
  • Help, support email addresses
  • News tool default URL
Still more...

- Imports – drafts or not?

  By default, assignment, discussion, and announcement items import with draft status

  import.importAsDraft = false

  # imports come in posted – not as drafts
Still more...

- Hide left hand menu column items by role
  e.g.,
  Web Content
Still more...

Hide left hand menu column items by role
sakai.properties of interest

portal.experimental.auto.reset= true|false

• Controls whether tools reset state
• Default is true
• Set to false - then tools won’t remember where they were when you leave and come back
sakai.properties of interest

display.users.present=true|false

- Display/not display user present list in all sites
- Default is true
sakai.properties of interest

Forums tool – recent change

mc.showForumLinksInNav= true|false
mc.disableLongDesc=true|false

• Disabled the links to the Forum-level pages, i.e. so users can navigate between the index page and topic pages but don't get lost in intermediate forums pages
• Removed the long descriptions (mostly to avoid visual clutter)
Resource – attachment access

resourceAttachments@org.sakaiproject.content.api.ContentHostingService

• Attachment viewing requires login now. Prior to 2.5 – attachment security by obscurity
• Default is true as of 2.5. Set to false to retain 2.4 and prior behavior
sakai.properties of interest

gatewaySiteList=

• Comma separated values indicating site IDs –
• These sites must include the .anon role and at a minimum give the .anon role site.visit - and any other permissions you want (usually *.read) permissions to the .anon role.
• If the .anon role does not have site.visit - these sites will not appear in the gateway - even if they are in this list
• If this is not set, the portal simply displays a single gateway site specified by gatewaySiteId

gatewaySiteList=!gateway,support,library
Questions

• Join discussion groups at
  http://collab.sakaiproject.org/mailman/listinfo

• Send email to
  sakai-dev@collab.sakaiproject.org
  sakai-user@collab.sakaiproject.org
Questions

• Documents
  • Word docs in subversion
  • https://source.sakaiproject.org/svn/reference/trunk/docs
• Confluence  http://confluence.sakaiproject.org
  • Sakaipedia, Sakai Installation FAQ