



## CTools QuickGuide

This QuickGuide is a very condensed version of the CTools Online Help Guide. It includes information about the following:

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|--------------------------------|--|
| A What is CTools?              | E Joining a site                       |
| B Opening CTools               | F Using the tools — brief instructions |
| C Logging in and out of CTools | G Creating and publishing a site       |
| D Some CTools terms            | H Getting help                         |

For detailed information on each of the topics above, or if you need information about a topic that is not covered here, please see the CTools Online Help Guide. The Online Help can be accessed by clicking the **Help** link in the menubar in CTools, or by clicking the little question mark in the upper-right corner most CTools webpages. To find out which browsers work best with CTools, please see the Online Help.

### A What is CTools?

CTools is a set of software tools designed to help instructors, researchers and students create sites on the web. Using a web browser, users choose from CTools features and tools to create sites that meet their needs. A few examples:

- a website where an instructor or project director can make announcements and share resources, such as electronic documents or links to other website.
- a website that serves as an online discussion board
- a course website where students can work on and submit assignments electronically

To use CTools, no knowledge of HTML is necessary.

### B Opening CTools

Open this URL in your browser: <http://ctools.umich.edu>

When you open this URL, you will arrive at a page that we call the CTools Gateway. This is not the actual CTools software that you will use — the gateway is simply the "public face" of CTools and is viewable by anyone with web access. From the Gateway, you can access a variety of information by clicking the links on the left-hand vertical menubar.

## C Logging in and out of CTools

### Logging in

This information is for UM instructors, staff and students. UM members do not need to pre-register or open a special CTools account to use CTools. Logging-in information for non-UM members can be found in the CTools Online Help Guide. (You can access the Online Help Guide by clicking the Help button in the CTools gateway, which is the page that opens when you open [ctools.umich.edu](http://ctools.umich.edu).)

- 1 To access the actual CTools software from the CTools Gateway (which opened when you opened the CTools URL), click the **Login** button at the top right corner of the CTools Gateway page.

- 2 Type your UM username and Kerberos password in the spaces provided.

- 3 Click the **Login** button on the “Authentication Required” window.

(If you are already logged into another UM web service, such as Wolverine Access or [mail.umich.edu](mailto:mail.umich.edu), then you will not have to type in your UM username and password again — CTools will open when you click the Login button on the Gateway page.)

When you log in to CTools, you will automatically open a special site called My Workspace. This is your own private, personal workspace — all CTools users have one. For more information, see “Some CTools terms,” below.

### Logging out

To log out of CTools, click the **Logout** button, which appears in the upper-right corner of most CTools webpages.

## D Some CTools terms

**My Workspace** — CTools provides each user with his or her own individual online workspace. Your workspace includes several tools, including Resources, Schedule, Worksite Setup, and Membership.

**Course Websites** — Websites that have been set up for courses. The links across the top of the screen will take you to each course website of which you are a member. (If you are not yet a member of any course or project websites, you will only see a link for your workspace.)

**Project Websites** — Websites that have been set up for projects and other activities involving collaboration. The links across the top of the screen will take you to each project website of which you are a member. (If you are not yet a member of any course or project websites, you will only see a link for your workspace.)

**Menubar** — A column along the left of the screen with links for each tool (e.g., discussions, announcements, resources, etc) in CTools. The number of links will vary depending on which tools were chosen for a site.

**Home** — This link in the menubar takes you to the homepage for a particular course or project.

Homepages can contain a list of recent announcements, recent discussion items, and selected resources.

**Users present** — This section of the screen lists all the users presently signed on to the site that you are in.

**Tabs** — In CTools, tabs are rounded rectangular buttons with the names of course and project sites. Clicking a tab takes you to that site.

**Notification** — Email that is sent out to alert site participants of a new resource or new announcement. Notifications are optional.



— This button, which appears in the upper-left corner of the main window next to the name of the tool you are using (e.g., discussion, schedule, resources, etc.), will take you back to the first page of that tool – the tool’s “homepage.”

## E Joining a site

If you are a student and you registered for a course, you will *automatically* become a member of the course site for that course. Also, if a project or course site creator has added you as a participant of his or her site, then you are automatically a member. In either case, you will see a link for the site, which you can click to open it. (If there are too many site links to fit across the top of the screen, additional sites may be listed in the pull-down menu to the right of the site links.)

Some site creators choose to make their sites joinable. These are sites that you are not automatically a participant in, but you have the option to join. You can join one of these sites as follows:

- 1 If you are not already in your workspace, open it by clicking the My Workspace tab, which is the left-most tab directly under the CTools logo.
- 2 Click **Membership** in the left-hand menubar. You may or may not see a list of project sites and/or course sites under the heading "My Current Sites." These are sites to which you have been granted access by the owners of the sites.
- 3 To see a list of sites that you can join, click the **Joinable Sites** link along the top of the main window.
- 4 Click the **Join** button under a site's name to join it. The site you joined will be added to the list of your current sites.
- 5 To open a site in your Current Sites list, click on the site's name.

If there is a site that you think you should automatically be a member of or should be able to join, but it doesn't appear in your Current Sites list or your Joinable Sites list, you will need to contact the site's creator or the instructor and request access.

## F Using the tools — brief instructions

**Announcements** *Description:* Used to inform users of changes in the schedule or policies of the class or project, as well as to answer questions or make general comments. *How to use:* Click Announcements in the menubar. To create a new Announcement, click Add in the upper left

corner of the main window. Type the announcement information in the form that appears. You can post ("add") your announcement, preview it, or save it as a draft. You can also add an attachment (see Attachments, below) and choose to have the announcement emailed to all the participants.

**Assignments *Description:*** Several kinds of work can be assigned on a course or project website. Class assignments can be turned in electronically for grading and comments. ***How to use:*** Click Assignments in the menubar. To create a new assignment, click New Assignment in the upper left corner of the main window. Type the assignment information in the form that appears. You can post your assignment, preview it, or save it as a draft. You can also add an attachment (see Attachments, below). To submit an assignment to an instructor, click on the name of the assignment to open it. Work on the assignment (you can add an attachment -- see below). Click the Submit button to submit your assignment. You can also Preview your assignment to see how it will look to the instructor.

**Attachments *Description:*** "Attachments" is not a button in the menubar. In CTools, you can attach one or more extra documents to your announcements, assignments, schedule items and discussion items. You can attach one or more documents from your computer, URLs to other sites, or resources that are already added to the site. ***How to use:*** When you create announcements, assignments, schedule items and discussion items, you will fill out a form with the necessary information. Near the end of these forms, click the Add Attachments button. On the next screen, click one of the buttons for types of attachments: Local File..., Website URL... or From Resources... In the form that appears, fill in the information about the attachment and click Attach. In the next window, click Save.

**Chat Room *Description:*** The Chat Room tool facilitates online discussion between site participants. Unlike the Discussion function, Chat operates in real time with any participant who is online. ***How to use:*** Click Chat Room in the menubar. Type your comment or response in the text box. Click Add message.

**Discussion *Description:*** This tool allows conversations in written form. You can set up a discussion with several categories. Each category can have topics, to which users can respond. Users can also respond to other responses. ***How to use:*** Click Discussion in the menubar. Click Add Category or Add Topic to add a category or topic. To reply to a topic or response, open that topic or response and click Reply to Topic or Reply to Message. Fill in the form that appears, and then click Add Reply. You can add an attachment to a discussion item (see Attachments, above).

**Drop Box *Description:*** The Drop Box tool allows instructors and students to share documents in a private folder for each student. The Drop Box feature can also be used by participants in a project site. Note, however, that in project sites, drop boxes are not private. ***How to use:*** Click Drop Box in the menubar. To create a new item, click Add to the right of the drop box folder you want the item to go into. Choose whether you would like your resource to be a document that is currently on your computer, an empty folder for organizing resources, a URL, or a text or html document that you type right into the New Item form. On the next screen, type your information, then click the Add button.

**Email Archive** *Description:* A repository for all messages sent to the site. *How to use:* Click [Email Archive](#) in the menubar. Click the subject of an email message to open it.

**Gradebook** *Description:* Allows instructors to list assignments and corresponding student scores, and calculate, store and distribute information about grades. *How to use:* In the left-hand menubar, click [Gradebook](#). Click [Add assignment](#), and fill in the information in the web form that opens. When you have filled in the form click [Submit](#). For instructions on using the various options available, see the Online Help Guide. (Click the [Help](#) link in the left-hand menu of any CTools page, click [Using the Tools](#), and then click [Gradebook](#).)

**Modules** *Description:* A lesson builder tool that you to create learning sequences in CTools. *How to use:* To use the Modules tool, we recommend that you see the Modules section in the CTools Online Help. (Click the [Help](#) link in the left-hand menu of any CTools page, click [Using the Tools](#), and then click [Modules](#).) The very first steps for creating a module include: Click on [Author](#). Click the [Add Module](#) link and define the properties of your module.

**News** *Description:* Allows your CTools site to receive topical news from online news sources. *How to use:* Click [News](#) in the menubar. Click [Options](#). Type a title for the screen. Type a full URL for an RSS News feed. (You must have the right permissions in CTools to do this.)

**Resources** *Description:* This tool allows you to post documents, electronic files, or URLs for users to access for a course or project. *How to use:* Click [Resources](#) in the menubar. To create a new resource, click [Add](#) to the right of the folder you want the resource to go into. Choose whether you would like your resource to be a document that is currently on your computer, an empty folder for organizing resources, a URL, or a text or html document that you type right into the Resources form. On the next screen, type your resource information, then click the [Add](#) button.

**Schedule** *Description:* The schedule can contain class or meeting dates, deadlines, web assignments dates, special events, etc. *How to use:* Click [Schedule](#) in the menubar. To create a new schedule item, click [New Event](#) in the upper-left corner of the main window. Type the schedule item information in the form that appears. Click [Save Event](#). You can also add an attachment (see Attachments, above).

**Site Info** *Description:* The Site Info tool provides information about the site you are in and allows you to make changes to the information about the site, the tools, and access to the site. You can specify groups of members. Using the Site Info tool you can also publish the site, duplicate the site, and specify material from other sites that you own to include in your site. Note that many of these functions are also available in the Worksite Setup tool which is visible in the left-hand menubar when you have your "My Workspace" open. *How to use:* Click **Site Info** in the left-hand menubar, and then click the buttons for what you would like to do and follow the online instructions. This is explained in greater detail in the CTools Online Help Guide..

**Syllabus** *Description:* The syllabus is the official outline for your course. As an instructor, if you or your department has prepared syllabus already, you can direct the Syllabus tool to link to it. You can also create a syllabus from within the Syllabus tool. *How to use:* Click [Syllabus](#) in the left-hand menubar. Click [Create/Edit](#) in the upper left corner of the main window. Once you enter create/edit mode, there are two ways to create a syllabus: 1) Click [Redirect](#) to have an external website page be shown as the syllabus, or 2) Create a new syllabus within CTools. To do this, click [New](#) in Create/Edit mode.

**Web Content *Description*:** This feature allows you to attach another website or a text description of your site. **How to use:** Click Web Content in the menubar. Click the **Options...** button. To link a webpage to your Web Content page, click the circle next to Display this URL, type the URL (without the http://) in box provided, and click Save. To add a text description, click the circle next to Display this worksite's description (specified when the site was set up). If you added a description when you first set up the website, it will appear in the Web Content page. You can go back and add or revise a description by going to My Workspace, click Worksite Setup, click the box next to the site, click Revise, click Edit site information, type a description, click Continue, click Finish.

**WebDAV *Description*:** WebDAV allows you to copy *multiple* files at the same time from your local system to CTools. (To upload a single file at a time, use the Resources tool.) **How to use:** Instructions for using WebDAV vary depending on what kind of computer and which operating system version you are using. For full instructions, see the Online Help Guide. (Click the Help link in the left-hand menu of any CTools page, click Using the Tools, and then click WebDAV.)

**Wiki *Description*:** A Wiki is a collaborative website in which multiple users can add and change the content. With the Wiki tool, you can add a wiki to a course or project website. **How to use:** To begin a wiki, you will essentially turn the Wiki Tool's Home Page into your first wiki document. Click the Wiki link in the left-hand menubar. Click the Edit link in the horizontal bar row of links near the top of the wiki window. You can remove any text you see in the text box, and add any text. Click Save.

## G Creating and publishing a course or project site

This section contains the basic instructions for putting together a site — for creating and publishing it. In addition, there are sections on publishing a site *after* you have created it; unpublishing a site; adding participants; and making a site joinable.

Please note that only UM instructors can create Official Course Sites. Instructors, researchers and students can create Project Sites.

Certain commands that are found in the Worksite Setup tool and are described below are also available in the Site Info tool, which appears in the left-hand menubar of every course and project site.

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### Step 1 — Getting started: creating a new site

- A First open CTools in your web browser:  
<http://ctools.umich.edu>
- B Click the **Login** button in the upper-right corner of the window and log in.
- C If you are not already logged into another UM web application, such as UM web mail, you will need to enter your username and Kerberos password, and click the next **Login** button.
- D Open your workspace. (If it is not already open, click the **My Workspace** tab.)
- E Click **Worksite Setup** in the menubar.
- F Click **New...** in the upper left corner of the main window.

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## Step 2 — Choose the type of website

- A Choose the type of site you want to create by clicking the radio button.

**Course website** — For a website that will be used for a UM course. (You'll also need to pull down the menu and choose the term) Note to students: If you don't automatically see a tab for your class when you login to CTools, please do not try to create an official course website. Contact your instructor for information about when your course site will be available.

**Project website** — For a website for a project.

- B Click **Continue**.

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## Step 3 — Identify the course for your site (For course sites only)

*If you are creating a course website, you will need to specify the course.*

*If you are creating a project website, skip to Step 4 1/2.*

- A There are two ways to specify the course for your site. You can pick one or the other but not both.

- If you are listed as the instructor of record for courses in the course catalog, these courses, and their sections, will be listed. "CL" indicates a cross-listed course. If you select one or more sections of a course from that list, a course site will be set up for you now, and the rosters you have selected will be added.
- If you are not listed as the instructor of record for a course, you will need to enter the instructor's (authorizer's) username. An email requesting his or her authorization for the site will be sent.

- B You can optionally add special instructions that may help the support staff authorize the site request.

- C Click **Continue**.

*If you are creating a Course Site, continue with Step 4, below.*

*If you are creating a Project Site, skip to Step 4 1/2, below.*

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## Step 4 — Add information about the course (For course sites only)

- A In the next screen you have the option of adding a description and a short description of the site. The long description appears on your site's homepage; the short description appears in the public list of sites in the CTools gateway, which is viewable by anyone.

- B Pull down the Appearance menu and choose your department.

- C Click **Continue**. (And continue with Step 5.)

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## Step 4 1/2 — Add information about your research or project (For project sites only)

- A In the form that appears, type a title for the project site.

- B You have the option of adding a long description and a short description of the site.

The long description appears on your site's homepage; the shorter description appears in the public list of sites in the CTools gateway, which is viewable by anyone.

- C You can type in the URL for a specific icon to appear in the upper left corner of the site.



- D Click **Continue**. (And continue with Step 5.)

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### Step 5 — Choose which tools to include in your site *(For both course and project sites)*

- A In the Worksite Setup window that appears, check the boxes next to the tools and features you would like for your site. (You can also add or remove features after you have created your site as follows: In your My Workspace, click Worksite Setup . Then click the box next to the site in your list of sites, and click the Revise button.)
- B You have the option to reuse material from other sites you own. If you would like to do this, click the radio button next to "Yes, from these sites:" and select the site or sites in the list . To select more than item, hold down the CTRL key (Windows) or the Apple key (Mac) and click your selections.
- C Click **Continue**.
- D If you checked the Web Content, News, or Email Archive boxes, after you click Continue on the Tool Selection page, you will see a form for more information.
- If you chose Email Archive, you will need to specify an email address.
  - If you chose Web Content or News, type a title for the left menu button for your Web Content or News window. For example, if you want the Web Content window to contain a weather website, you can give the button the name Weather.
  - If you leave "Web Content" or "News" as the title or if you leave the box blank, the button will be named "Web Content" or "News." (You can change the button name later using the Edit Tools tool, which can be accessed by clicking Site Info in the menubar of every site.
- E Click **Continue**.

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### Step 6 — Publish your site and make it joinable

Publishing your site makes it available to the site participants. Global access settings allow you to decide who has access to your published site.

- A To publish your site, the box next to Publish site must be checked. (You can also go back to your site at a later time and publish it. See the section below.)
- B Choose what type of access you want. You can make your site private (for you and the participants) or accessible to anyone who can log in to UM's web environment. In the latter case your site will be displayed in the public list of sites in the CTools gateway (the page people see when they first log on to ctools.umich.edu.)
- C If you would like your site to be joinable by anyone with authorization to log in, check the box. You can then specify the role for those who join. For more information about CTools roles, see the section on adding participants, below.
- E Click **Continue**.

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### Step 7 — Confirm the information and selections for your course

- A Confirm the information for your site in the window that appears.
- B If you need to make a change, click the **Back** button on the CTools screen (not your browser's back button).



- C When all the information is correct, click **Create Site**. When it is processed, your new site will be listed in your site list in My Workspace under Worksite Setup.

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### Publishing a site after the site has been created

Publishing your site makes it available to site participants. You may already have published your site as described in Step 5, above. If not, you can follow the steps below after you site is created to publish your site.

- A Open your workspace by clicking the **My Workspace** tab.
- B Click **Worksite Setup** in the menubar.
- C Check the box next to the site you would like to publish.
- D Click **Revise**.
- E Click the **Site Access** button.
- F Click the radio button next to Publish site.
- G Then choose what type of access you want. You can make your site private, available to anyone you add as participants, or available to anyone, in which case your site will be displayed in the public list of sites in the CTools gateway (the page people see when they first log on to ctools.umich.edu).
- H When you have finished, click **Update**.

Note: You can also publish a site using the Site Info tool, which you can access from the Site Info button in the left-hand menubar of each site.

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### Unpublishing a site

Unpublishing a site makes it unavailable to the site's participants.

- A To unpublish a site, first open the site.
- B Click **Site Info** in the left-hand menubar.
- C Click the **Site Access** link along the top of the main window.
- D Uncheck the box next to "Publish Site" by clicking on the box.
- E Click **Update**.

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### Adding participants

If you are creating a course site, the students will automatically be added to your site when they register. At times, you may need to add students as described below. For project sites, publishing a site makes it available to participants. Whether you have published your site or not, you can add participants as described below.

- A Click **Worksite Setup** in your workspace. You will see a list of sites you have created and sites to which you have access.
- B Check the box next to the site to which you would like to add one or more participants (or students).
- C Click **Revise**.
- D Click **Add Participants**.
- E Type the participant's username. You can type more than one username in the box.
- F Choose whether to give all your newly added participants the same role or different roles.
- G Click **Continue**.

- H In the next window, if you chose to give all your participants the same role, pull down the menu by each username and choose either:

**For course websites:**

- Affiliate - Can read, add, and revise content on sites in a particular department.
- Assistant - Can read, add, and revise most content on the site.
- Instructor - Can read, revise, delete and add both content and participants to a site.
- Observer - Can read content on the site.
- Owner - Can read, revise, delete and add both content and participants to a site.
- Student - Can read content, and add content to a site where appropriate.

**For project websites:**

- Member - Can read, revise, delete, and add their own content to a site.
- Observer - Can read content on the site.
- Organizer - Can read, revise, delete and add both content and participants to a site.
- Owner - Can read, revise, delete and add both content and participants to a site.

- I Click **Continue**.
- J On the next page, you have the option to automatically send email to the newly-added participants notifying them of the site's availability.
- K Click **Continue**.
- L Click **Finish**.

## H Getting help

### Consultants

To contact the CTools consultants, you can fill in the form in the CTools Online Help Guide. To open the form:

- 1 Click the **Help** button in the left-hand menubar.
- 2 Click **Getting Help** in the left-hand list of contents.
- 3 Click **Contacting CTools Consultants**

After you have filled in the form, click the **Send** button. (You may need to scroll down to see the button.)

Another way to contact the consultants is through email:

[ctools-support@umich.edu](mailto:ctools-support@umich.edu)

If you send email to the consultants, please include the following information:

- name and/or URL of the site in question
- browser being used (include the version number) :
- operating system being used
- any error messages

Using the form above and sending email are the preferred ways to contact the CTools consultants. Note that when you use either of these methods, multiple experts have access to your request, often after business hours.

Between 9:00 and 5:00, Monday through Friday you may telephone CTools Support at (734) 615-5512. We cannot return long distance calls. Voicemail messages left outside of these hours will be retrieved at the start of the next business day. If you leave a voicemail message, please speak clearly and include the information in the bulleted list above (name and/or URL of the site, etc.)

### Online Help Guide

The CTools Online Help guide is a comprehensive guide to using CTools. It includes overview information, CTools history, glossary, individual sections for each of the tools, and much more.

To open the Online Help, click the Help button in the left-hand menubar. You can also access tool-specific help by clicking the small question mark in the upper-right corner of most pages in a tool.

### CTools Training

Several workshops on using CTools are offered each term. To view the training schedule, click this URL:

[www.umich.edu/~teachtec/dmc.html](http://www.umich.edu/~teachtec/dmc.html)

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Please send suggestions and comments about this CTools QuickGuide to:

`ctools-doc-comments@umich.edu`

We like to get all kinds of feedback about this CTools QuickGuide:

- suggestions for improvements
- parts that need to be clarified
  - suggestions for additions
    - errors
  - anything else

Thanks!