Sakai
Training Manual

Confidential & Proprietary
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1.0 Sakai Introduction

The Sakai Collaboration and Learning Environment is an extensible service-oriented architecture for building and deploying enterprise-scale collaboration, education and research tools and services. Sakai supports teaching and learning, ad hoc group collaboration, portfolio support, and research collaboration.

Sakai, named after Iron Chef Hiroyuki Sakai, is a free and open source product that is built and maintained by the Sakai community. Sakai’s development model is called "Community Source" because many of the developers creating Sakai are drawn from the "community" of organizations that have adopted and are using Sakai. The Founding members of Sakai were University of Michigan, Indiana University, MIT and Stanford University in partnership with uPortal and the Open Knowledge Initiative (OKI).

The Sakai Project, supported generously by the Mellon and Hewlett Foundations and a number of founding member universities, has given way to the non-profit Sakai Foundation, a community-funded and community-sustaining institution fostering innovation and a common, open approach to software development and distribution.

In addition to this manual, community resources are available at the following sites:

http://www.sakaiproject.org – Sakai Project website which includes information on Sakai, upcoming conferences, recent news, releases, etc.

http://collab.sakaiproject.org/portal - Sakai Collaboration Site that actually runs on the Sakai Platform! Anyone can join the site by using the “New Account” tool on the left side of the screen. Once a member, users may join any number of email discussion lists, such as user support, development, portal integration, etc.

http://bugs.sakaiproject.org/jira - Sakai Bug Management System which includes search capabilities. Anyone can create a user account and submit bugs and enhancement requests.

http://bugs.sakaiproject.org/confluence - Sakai Confluence Site that provides helpful information regarding tools, configuration & conferences.

http://bugs.sakaiproject.org/confluence/display/ENC/Home - Sakaipedia (Sakai Encyclopedia) is a collection of articles organized by topics of interest to Sakai users, administrators, designers, and developers.

https://source.sakaiproject.org/svn/reference/trunk/docs/architecture/sakai_properties.doc - This link displays the most current version of the Sakai Properties document. Authored by John Leasia at the University of Michigan, this document provides properties configuration information for System Administrators.
5.0 My Workspace

The My Workspace worksite contains its own set of configurable tools unique to this personalized area. The My Workspace worksite provides each user an area containing tools enabling the management of individual information.

By default, a user in My Workspace worksite is able to do the following:

- Post files to a private resource tool
- View an integrated schedule of all the user's worksites
- Create private schedule items
- View announcements from all the user's worksites
- View a list of sites in which the user belongs
- Manage and edit worksites the user owns
- Join new worksites
- Manage personal preferences

**Note:** The available My Workspace worksite toolset is edited via the Sites tool located in the Administration Workspace.

The following sections include a list and description of the default tools available in each user's My Workspace.

5.1 Home

The Home page is a customizable tool serves as the landing page. By default, the Home page includes the most frequently used tools by worksite users, such as recent announcements, recent chat messages, recent discussion forums, and a worksite information page.

5.2 Profile

The Profile tool allows Sakai users to enter personal information and publish this information to other Sakai users. All Sakai users have the ability to search for published user profiles by user ID or last name. Users have the ability to include a picture for the profile.

**Note:** Users have the option to hide their personal details from others and/or hide entirely the personal profile from others.

5.3 Membership

The Membership tool allows users to view a list of their worksites. In addition, this tool allows users to search for and join available or open worksites.

**Note:** Once a user joins an open worksite, the worksite name appears as a tab on the top of the menu screen.

Complete the following steps to join a Worksite:

1. Login to Sakai.
2. Click the My Workspace tab.
3. Click on the Membership tool.
4. Click the Joinable Sites link.
5. View the list of joinable worksites or use the search tool to find a site of interest.
6. To join the site, click the Join link.

5.4 Schedule
The Schedule tool provides a calendaring tool for users. In addition, the Schedule tool displays all scheduled items from all the user’s worksites. This comprehensive calendar reveals all personal appointments, assignment due-dates, exam dates, club meetings, etc. Finally, the Schedule tool allows for importing calendar files, such as Meeting Maker, Outlook and generic CSV calendar files.

Complete the following steps to add a calendar event to the Schedule tool:
   1. Login to Sakai.
   2. Click the My Workspace tab.
   3. Click the Schedule link.
   4. Click the Add link located at the top of the screen.
   5. Complete the required information.
   6. Click Save Event button.

5.5 Resources
Eliminating the need to carry a floppy disk, the Resources tool allows the user to store files. This tool enables users to upload files from a local computer to Sakai. Users may also create a webdav client on their personal computer to allow for easy drag-and-drop.

Note: The default maximum upload size is configurable by editing the content.upload.max value located in the sakai.properties file.

Note: The maximum storage capacity for the Resources tool for the My Workspace worksite template can be changed via the Site Management tool, which needs to be added to the Administrative Workspace using the Sites tool.

Complete the following steps to add a file to Resources:
   1. Login to Sakai.
   2. Click on the My Workspace tab.
   3. Click on the Resources tool.
   4. Click the Add link.
   5. Choose the file type from the Add Item Type dropdown list.
   6. Click the Browse button to browse your computer for the file.
   7. Complete the Title and Copyright Status information.
   8. Click Add button.

Complete the following steps to creating a webdav client for the Resources tool:
   1. Login to Sakai.
   2. Click on the My Workspace tab.
   3. Click on the Resources tool.
   4. Select the Upload-Download Multiple Resources link and follow the detailed instructions.
5.6 Announcements
The Announcements tool supplies a summary list of announcements generated from all the worksites that the user belongs to.

*Note:* The worksite owner will see the announcements he or she has created in addition to announcements generated from all the worksites that this user belongs to.

5.7 Worksite Setup
The Worksite Setup area enables worksite owners/creators to manage created worksites. This tool allows the worksite owner to edit the worksite’s tools, site information, groups, site access, manage the site’s permissions, and duplicate the site.

*Note:* Permissions associated with a user’s account type will determine whether or not the individual is allowed to create new worksites. Register and maintain account types enable the user to add new worksites.

*Note:* The Worksite Setup tool can be removed from the My Workspace worksite for all users.

5.8 Preferences
The Preferences tool permits Sakai users to manage preferences for Announcements, Email Archive, Resources and the Syllabus. In addition, this tool allows users to customize their own tab layouts, set time zone, and change the language preference.

*Note:* The preference customizations apply only to the user’s worksites and cannot be customized on an individual site by site basis.

5.9 Account
The Account tool allows the user to modify and update personal account information. The editable information includes the following: first name, last name, email address, and password.

5.10 Help
The Sakai application includes a system knowledge base offering context specific help. This tool enables full text searches within the help documentation. The default Help information can be edited.

5.11 Edit the Default Toolset located within My Workspace
The default toolset can be modified. Administrators can complete the following steps to change the available tools.

**Administrator** – To remove a tool from the My Workspace default toolset, complete the following steps:

1. Log in as administrator.
2. Select the Administration Workspace tab.
3. Click the Sites tool link.
4. Select the Site ID.
5. Click Add/Edit Pages button option. This will display the current pages containing the current toolset. To remove a page containing a tool, click the page and then select Remove Page link.
6. Select Save button.
Administrator – To add a tool to the My Workspace default toolset, complete the following steps:
1. Log in as administrator.
2. Select the Administration Workspace tab.
3. Click the Sites tool link.
4. Select the Site ID.
5. Click Add/Edit Pages button option.
7. Enter a Title.
8. Select the Tools button in order to add the tool to the page.
10. Select the tool.
11. Click Save or Done button to save.
6.0 Sakai Tools

The default installation of Sakai contains a standard set of tools referred to as core components. In addition, other Sakai tools exist but are referred to as provisional as they are not fully sanctioned by the Sakai community. A tool is considered to be provisional when it is mature enough to be included in a release distribution, but is not yet considered to be an official part of the enterprise bundle and does not come enabled. The concept behind a provisional tool release is to allow institution’s to test the new capabilities and provide feedback.

Below is a list of currently available tools.

*Note: This list will change as new tools emerge.*

### Core Components
- Administrative Tools (Preferences, Alias Editor, Site Archive tool, Memory/Cache tool, On-Line, Realms Editor, Site Management, Sites Editor, User Editor, MOTD)
- Announcements
- Assignments
- Chat Room
- Discussion
- Drop Box
- Email Archive
- Form View
- Forms
- Gradebook
- Help Documentation
- Job Scheduler
- Login
- Membership
- News
- Preferences
- Presentation
- Profile
- Recent Announcements
- Recent Chat Messages
- Recent Discussion Forums
- Resources
- Schedule
- Section Info
- Set Permissions
- Site Browser
- Site Info
- Syllabus
- Web Content
- Worksite Setup

### Contributed/Provisional Components
- Admin: Become User (SU Tool)
- Blogger
- Calendar Summary
- Checklist
- Goal Management
- IconService
- JForum
- Kx509
- Linktool
- MailTool
- Melete
- Message Center
- OSP Tools (Open Source Portfolio tools)
- Post ‘Em
- Recent Activity
- Roster
- Rwiki
- Sakaibrary
- SCORM Player
- Search
- Site Privacy Status
- Sitestats
- Tests & Quizzes (Samigo)
- Twin Peaks Navigator/Authoring Tool
- UserMembership
- Wiki
7.0 Creating a Worksite

This section details how to create a course worksite and a project worksite. When creating a worksite, Sakai users are given the option to select whether the worksite will be a course or project worksite type. Keep in mind that different tool sets are available for the various worksite types. This list of available tools for both the project and course worksite template is configurable by the system administrator.

Note: Only users with the appropriate permissions can create worksites.

7.1 Creating a Course Worksite

To create a new course worksite, complete the following steps:

1. Log into Sakai.
2. Click Worksite Setup link located within My Worksite tab.
3. Click the New link located in the top left corner of the screen.
4. Select the course worksite radio button and select the appropriate academic term from the dropdown list.
5. Click the Continue button.
6. If your institution has integrated Sakai with a student information system, please select the appropriate roster. If not, check the checkbox next to the statement, "I want to give access to a roster not listed above."
7. Click the Continue button.
8. Input the required data in the textboxes regarding subject, course, etc.
9. Click the Continue button.
10. Enter a worksite description and brief course.

Note: Worksite description appears on the worksite’s homepage.

11. An icon may be selected to appear in the top left corner of the worksite.
12. Click the Continue button.
13. Next choose the tools to be included in the newly created worksite. An option also exists enabling the user to import content from other worksites. Please see the following screenshot.

14. Click the Continue button.
15. The next screen enables the user to publish the worksite. The user may also opt to publish this worksite so that all users may join and access the worksite. In the aforementioned scenario, the creator must select a role type for participants.
16. Click the Continue button.
17. Confirm site setup and select the Request Site button.

**Note:** Three role types exist for course participants: Instructor, Student, and Teaching Assistant. Each role type is associated with a set of permissions. For example, the Instructor role by default includes the most permissions, allowing for content-editing, grading assignments, posting schedules and announcements. The Student role by default includes the ability to participate in chat and discussions, and grants read access to the worksite tools such as schedule and announcements. The Teaching Assistant role grants some write and read permissions.

**Note:** In the event that the Sakai instance is integrated with a student information system and the worksite creator selected the appropriate roster, the course participants will be enrolled in the course. If not, the course participants will have to be added later.

### 7.2 Creating a Project Worksite
To create a new project worksite, complete the following steps:

1. Log into Sakai.
2. Click Worksite Setup link located within My Worksite tab.
3. Click the New link located in the top left corner of the screen.
4. Select the project worksite radio button.
5. Provide the required information regarding site title, description, etc.
6. Click the Continue button.
7. Select from the list of available project worksite tools. Material from other worksites can also be used in this newly created worksite.
8. Click the Continue button.
9. The next screen enables the user to publish the worksite. The user may also opt to publish this worksite so that all users may join and access the worksite. In the aforementioned scenario, the creator must select a role type for participants.
10. Click the Continue button.
11. Confirm site setup and select the Request Site button.

**Note:** Two role types exist for project worksite participants: access and maintain. Each role type is associated with a set of permissions. The access role gives users limited worksite permissions. The maintain role grants users more extensive permissions.

### 7.3 Create Additional Worksite Tools
Additional worksite tools can be created.

**Administrator** - Complete the following steps to make additional worksite tools available:

1. Locate the xml file for the tool.
   **Note:** The file is generally named sakai.(toolname).xml
2. Add one or both of the following to the xml file:

   ```xml
   <category name="project" />  Add this tag to insert the tool into the project worksite template
   
   <category name="course" />  Add this tag to insert the tool to the course worksite template
   ```
**Administrator** - Complete the following steps to remove worksite tools:

1. Locate the xml file for the tool.
   *Note: The file is generally named sakai.(toolname).xml*
2. Add one or both of the following to the xml file:
   
   `<category name="project" />`  
   Remove this tag to take out the tool from the project worksite template

   `<category name="course" />`  
   Remove this tag to delete the tool from the course worksite template
8.0 Using the Tools

This section details the core Sakai tools. These tools come enabled with a default installation.

8.1 Announcements Tool
The Announcements tool publishes important information to worksite participants. The instructor has three options available when determining the access level for an announcement. Announcements can be posted to the public which allows the announcement to be viewed by unauthenticated users through the site browser in the Gateway page. Announcements can be posted to the entire worksite allowing access to all of the worksite’s participants. Finally, announcements can be targeted to specific groups or sections within the worksite.

The posted announcement can include attachments, website links, or items from the Resources tools in the worksite. In addition to posting an announcement, the instructor can also have the announcement emailed to site participants.

Announcements can be assigned either a high or low priority setting. A high priority setting will override the user’s notification setting selected in the Preferences tool.

Complete the following steps to create an Announcement:

1. Access the worksite and select the Announcements link.
2. Select the Add link located at the top of the screen.
3. Input the announcement title.
4. Create the body of the announcement in the text editor.
5. Select the display option radio button.
   The display options are as follows:
   - Display to public radio button enables anyone with access to the Sites tool on the Gateway page to view the announcement providing the site is published for public viewing.
   - Display to site radio button allows only worksite participants to view the announcement.
   - Display to selected groups radio button enables the user to target specific course sections within the worksite.
6. Select Add Attachments button to add attachments.
7. Select an e-mail notification option from the drop down list if desired.
8. Click Add Announcement button.
**Note:** The newly created announcement will display within the course worksite in the Announcements tool and it will also appear in each participant’s ‘My Workspace’ Announcements page.

### 8.2 Email Archive Tool

Students and instructors must have an external internet email address to utilize the Email Archive tool. Worksites within the Email Archive tool are assigned a worksite email alias, which works like a listserv, sending emails to all site participants based on the notification preferences the individual has outlined in his or her My Workspace. All Worksite emails sent through the worksite email address will appear on the Email Archive page for the worksite, so that if users delete or lose any of the course emails, he or she may access it again via the Email Archive page.

Email preferences are listed below:

- Email messages sent to the site email alias can be sent one at a time to the participant’s private email account. A copy of this message is also posted in the Email Archive tool within the project or course website.

- Participants can choose to have a daily digest of messages generated from a worksite sent to their private email account.

- Participants can choose to not have any site emails sent to their individual account and utilize the Email Archive tool to view all messages instead.

Complete the following steps to manage preferences and permissions for the Email Archive tool:

1. Log into Sakai.
2. Click on the course or project worksite for which you would like to manage Email Archive preferences.
3. Select the Email Archive tool.
4. In the following screenshot, note that the Email Archive tool will list the email address for the worksite, as well as the email address from which you are allowed to send emails through the worksite.

   ![Email Archive](image)

   **Options**  **Permissions**

   You are authorized to send email from: kstiles@unicon.net
   Email sent to the following addresses will be archived and sent to participants:

   - english@hermes.unicon.net
   - fd03bf8c-635f-40e7-004c-fed3a03b50fa@hermes.unicon.net

   No archived email yet...

5. To send an email to the worksite participants, access your own external e-mail client and send an email to the worksite email address.
6. To set options/preferences, click the Options link.
a. To allow your email archive to accept messages from anyone, click the Anyone radio button below your mailbox settings.
b. To set your email archive to accept messages from worksite participants only, select the Only Site Participants radio button.
c. To change the site’s email alias, make your changes in the Site Email Address field.
d. Click Update Changes.

7. To set permissions for the user types associated with this worksite, click the Permissions link. See below for a screenshot of the available roles for this worksite and the associated permissions.

8. Make necessary changes and click Save.

### 8.3 Presentation Tool
The Presentation tool allows the instructor to upload images and present the information to many participants. The slides must be in an image (.jpg, .gif, .png) format, and the presentation tool will turn all images into thumbnails for quick and easy viewing.

To upload image files to the presentation folder, complete the following steps:
1. Login to Sakai.
2. Access the worksite.
3. Click the Resources tool.
4. Select the folder for the worksite.
5. Within the Actions column, click the Add link.
6. Within the Add Item Type dropdown box, select Empty Folder.
7. The title of this folder must be **Presentations**.
8. Complete the rest of the required information and click Add.
9. Click the newly created Presentations folder.
10. Within the Actions column, click the Add link.
11. Within the Add Item Type dropdown box, select File Upload option.
12. Click the Browse button to locate desired file.
13. Complete the required information fields and click Add.

*Note: If you have set-up a webdav client on your computer for this particular worksite, you can drag-and-drop items from your PC to this Presentations folder.*

### 8.4 Syllabus Tool
The Syllabus tool provides instructors the ability to create and post their course syllabus online. The three ways to create a syllabus are as follows:
- Create the syllabus online using the provided rich text editor.
- Create the syllabus in a word processing document and copy and paste the document into the rich text editor provided.
- Create an inline frame so that when users click on the syllabus a web page is rendered within the page.

**Complete the following steps to create a Syllabus online:**
1. Access the worksite.
2. Select the Syllabus tool.
3. Click the Create/Edit Link.
4. A list of syllabi will display. To add a new syllabus, click the Add link.
5. Enter a syllabus title in the Title field.
6. Create or paste syllabus into the Content section.
7. Select whether this Syllabus will be available to the public or made available to site participants only by clicking the appropriate radio button.
8. Add attachments if necessary by clicking the Add Attachments button.
9. Select whether an e-mail notification should be sent to course participants.
10. Next, select the Preview button to preview the syllabus or select Post to publish the syllabus to the worksite. Finally, the Save Draft enables the user to save the syllabus for later editing.

**Complete the following steps to redirect the Syllabus to another website:**
1. Access the worksite.
2. Select the Syllabus tool.
3. Select the Redirect link.
4. Next, type the URL to redirect the syllabus.
5. Click Save.

**8.5 Chat Tool**
The Chat room provides an area for instructors and students to have real-time chat conversations with other participants in a course or project worksite. The Chat tool supports the creation of multiple chat rooms, however only one chat room can be active at any given time. Instructors can manage permissions for the chat room by clicking on the Permissions link located at the top of the page. In addition, Instructors can administer multiple chat rooms by clicking on the Options link.
To manage permissions in the Chat Room, complete the following steps:
1. From within the chat room, click the Permissions link.
2. Select the appropriate permissions for the roles within the worksite.

<table>
<thead>
<tr>
<th>Role</th>
<th>read</th>
<th>new</th>
<th>delete any</th>
<th>delete own</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Student</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Teaching Assistant</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
</tbody>
</table>
3. Click Save.

8.6 Discussion Tool
The Discussions tool within Sakai provides users the ability to collaborate among classmates and team members within a given course or project worksite. The instructor has the ability to create pre-defined discussion topics for the students or grant students the permission to create their own topics.

The Discussion tool provides the following capabilities:
- Discussions organized by Category and Topic.
- Permission setting for discussion posts.
- Include attachments within discussions.
- Post replies or save replies as a draft. Drafts will appear only in the discussion thread and viewable by the only author.
- Multiple viewing formats.
- Search capability.
- Expandable and Collapsible views for the discussion items.

Complete the following steps to create a new discussion Category and Topic:
1. Access the worksite.
2. Click the Discussion tool.
3. Click the Add Category link.
4. Enter Category name.
5. Click Create Category.
6. Click Add Topic.
7. Select the Category under which this Topic will be located.
8. Select the Topic Format.
9. Type message using the rich text editor.
10. Click Add Attachments if needed.
11. Click the Add Topic button.

Complete the following steps to respond to a topic or discussion message:
1. Access the worksite.
2. Click the Discussion tool.
3. To view all Discussion topics, click the Expand All link located in the top menu options.
4. To view all topics within a Category, click the black triangle icon to the left of the Category name.
5. To view messages within a Topic, click on the link that displays the title of the message or click the black triangle icon to the left of the Topic name.
6. To reply to a Topic or message, click the Reply To This Topic button.
7. Type the title in the appropriate field.
8. Type a message in the message editor.
9. Click the Add Attachments if needed.
10. Click Add Reply.

**Note:** Discussion forums may also be searched by entering text in the Search field located at the top right corner of the screen.

Complete the following steps to manage permissions for Discussion tool:

1. From within the Discussion tool, select the Permissions link.
2. Set the appropriate permissions for the user roles.
3. Click Save.

### 8.7 Section Info Tool (Managing Course Sections)
Instructors may decide to create a single worksite for a course which has many sections. The instructor gets to decide whether students may sign-up for sections and whether students may switch sections. The instructor may also assign Teaching Assistants to each section, allowing the Teaching Assistants to send announcements, schedule items for students, or grade assignments submitted by students within their section.

To create Course Sections, complete the following steps:

1. Select the worksite.
2. Select the Section Info tool. If sections have been currently defined for this course, they will display on the screen.
3. To add a section or sections, click the Add Sections link.
4. Select the category and number of sections to create.

**Note:** Category serves as a guide; there are no functions or permissions associated with any category.

5. Click the Add Sections button.
6. Complete the text fields to include section title, days, start time, end time, maximum size and location.
7. Click Add Section.

To assign students to a section, complete the following steps:

1. Click the Assign Students link located next to the section.
2. Click the Assign Students button.

OR
1. Click the Options link located at the top of the screen.
2. Select the options to determine whether students can sign up for sections and whether students can switch sections.
3. Click Update.

Complete the following steps to grant user TA permissions:
1. Access the worksite.
2. Click on the Site Info tool.
3. Scroll down to view the list of participants and their roles.
4. When the user to be designated as TA is located, select the Dropdown box within the Role column and select Teaching Assistant.

5. Once the Teaching Assistant role is assigned to the TA, click the Update Participants button.

Note: Before a TA can be assigned to a section, the course worksite must recognize the user as a TA within the worksite.

Complete the following steps to assign a TA to a section:
1. Access the worksite.
2. Click the Section Info link.
3. Locate the section to assign the TA and select the Assign TA's link.

4. From the list of available Teaching Assistants in the left column, select the TA to assign to this section.
5. Click the Move Selected button.
6. Click the Assign TA’s button.

Considerations regarding sections:
- Students can only be a member of one section category per worksite
- Students cannot join a section if it is full

8.8 Manage Groups within a Worksite
Groups are similar to generic sections. However, groups do not possess associated data such as meeting location, time or assigned TA’s. Only the instructor can edit groups/participants and only the instructor can see the members of a particular group. Unlike sections, group members do not have the ability to sign up for groups or switch groups.

Complete the following steps to create groups and add members:
1. Access the worksite.
2. Click the Site Info tool.
3. Click the Manage Groups link.
4. Click the New link to create a new group.
5. Provide a title and description for the group.
6. Select the members of the group (use the CTRL key to select multiple members).
7. Click the Add To Group button.
8. Click the Update button.

8.8.1 Group Awareness
When sections or groups are created within a worksite, other tools become group aware, allowing the instructor to target certain content (such as announcements and schedule items) to specific groups or sections.

8.8.2 Group/Section Aware Tools
The following tools are group/section aware:
- Schedule
8.9 Drop Box Tool
The Drop Box tool is similar to the Resources tool in that it allows for the upload/download/sharing of files. While the Resources tool allows an instructor (and perhaps TA's) to share files with all worksite participants or with specified groups, the Drop Box allows for file sharing between the instructor and an individual student only.

To use the Drop Box as an Instructor, complete the following steps:
1. Access the worksite.
2. Select the Drop Box tool. A list of worksite participants displays.
3. Click on the name of the participant to share files. If files exist within this shared Drop Box, a list of file names and/or subfolders will display.
4. To add a file or folder to the drop box, click the Add link, complete the required information, and click Add.
5. To remove a file or folder from the drop box, place a checkmark in the box to the left of the file/folder(s) to be removed and click the Remove Checked link.

To use the Drop Box as a Student, complete the following steps:
1. Access the worksite.
2. Select the Drop Box tool. A single folder displays. This is the folder that the user will share with the instructor.
3. To add a file or folder to the drop box, click the Add link, complete the required information, and click Add.
4. To remove a file or folder from the drop box, place a checkmark in the box to the left of the file/folder(s) to be removed, and then click the Remove Checked link.

8.10 Modules Tool (Melete)
The Module tool is a lesson builder allowing instructors to publish content in their course worksites. Modules, once created, can be exported and imported into other worksites. The module tool can be used for lessons, course notes, etc. Modules is a provisional tool not included in a baseline Sakai deployment. This tool must be downloaded by the system administrator and installed.

To create lessons using the Modules Tool, complete the following steps:
1. Access the worksite.
2. Click the Modules tool.
3. Notice three options exist: View, Author and Manage.
4. The default option for instructors is Author. As a result, the Author screen will appear for instructors when they click on the modules tool.
5. From this screen, an instructor may Add, Edit, Delete or Make a Module inactive.
6. To add a module, select the Add link.
7. On the ‘Adding Module’ screen, enter an appropriate Module Title, Description, Keywords, Start Date, End Date and Copyright license.
8. Click the I Agree button.
9. Select the Add link located at the bottom of the page.
10. Click Add Content Sections.

To view modules from a student perspective, complete the following steps:
1. Access the worksite.
2. Click the Modules tool.
3. Click the View link and see the student view.

To manage Modules, complete the following steps:
1. Access the worksite.
2. Click the Modules tool.
3. Select the Manage link.
4. On the ‘Managing Options’ page, four options exist:
   a. Restore: Allows the user to restore inactive modules to the active list.
   b. Sort: Allows the user to re-sort the modules or the sections within a module.
   c. Change Label: Allows the user to change the label Module.
   d. Export/Import: Allows the user to Export and Import Modules (IMS/QTI compliant).

In the event that modules from another worksite are to be reused at a later date, the user must export the modules from the current worksite first and then import them into the new worksite.
To export Modules, complete the following steps:
1. Access the worksite.
2. Click the Modules tool.
3. Select the Manage link.
4. Click the Export/Import link.
5. Select the Export link.
6. A screen appears asking whether to Open or Save the file.
7. Select Save or Download (options will vary depending on your browser).
8. Select a location on your PC to download this file.
9. Click Ok or Save.

To import Modules, complete the following steps:
1. Access the worksite.
2. Click the Modules tool.
3. Select the Manage link.
4. Click the Export/Import link.
5. Click the Browse button. Locate the file to be imported (must be a .zip file).
6. Click the Import button.
7. Return to the view screen window by clicking the View link.

### 8.11 Resources Tool

The Resources tool within each worksite acts as an electronic storage area for documents. This tool can also exist on a user’s My Workspace page. Instructors can create documents on a local computer and upload files to the Resources tool where they will be stored and shared with other members of the worksite. URLs and HTML files may also be uploaded and shared. In addition, instructors may create a webdav client on their personal computer to allow for easy drag-and-drop transfers to their Resources tool. Instructors may also set permissions for their worksite’s Resources tool.

**Note:** The default maximum upload size can be changed by editing the `content.upload.max` value in the `sakai.properties` file on the server. The maximum capacity of the Resources folder for a site can be changed via the Site Management tool, which needs to be added to the Administrative Workspace using the Sites tool.

Complete the following steps to add a file to the Resources tool:

1. Access the worksite.
2. Click on the Resources tool.
3. Click the Add link from within the Actions column.
4. Select the ‘item type’ (i.e. File, URL, HTML page).
5. Click the Browse button to search for the file.
6. Complete the Title and Copyright Status information.
7. Click Add.

Complete the following steps to create a webdav client for the Resources tool:

1. From within the worksite, click Resources.
2. Select Upload-Download Multiple Resources.
3. Follow the detailed instructions.

Complete the following steps to create to set permissions for the Resources tool within your worksite:

1. Access the worksite.
2. Click on the Resources tool.
3. Click the Permissions link.
4. Create permissions for the roles within the worksite.

Considerations regarding the Resources folder:

- Sub-folders may be created and displayed to certain sections of the course.
- Permissions may be set at the folder level by clicking the Permissions link in the Actions column.

8.12 Tests & Quizzes (Samigo)

The Tests & Quizzes tool (also known as Samigo) allows the instructor to create, deliver and grade tests & quizzes. Samigo communicates with the Gradebook tool. For example, when the instructor grades an online exam for a student and assigns a point value, this information automatically transfers to the Gradebook. Samigo allows instructors to create question pools and it includes an export/import feature so that tests & quizzes can be used in another worksite or at a later date.

*Note: Samigo is a provisional tool.*

Complete the following steps to create a new assessment:

1. Access the worksite.
2. Select the Tests & Quizzes tool.
3. Select the appropriate assessment type. The Assessments tool displays three options: create a new assessment, core assessments (this lists the existing assessments), and published assessments (exams that have been released to students).
4. Provide title and select the Create button.
5. The next screen displays many tools, such as Add Part, Settings, etc. Add Part allows instructors to add additional parts to their assessments. Settings tool allows instructors to customize the assessment, breaking from the original assessment “type.” To create a question, select the appropriate question type.

6. If you have created multiple Parts to the assessment, select the appropriate Part in which this question will reside.
7. If appropriate, assign a point value for this question.
8. Continue to complete the required information. Note, the instructor may provide feedback for correct and incorrect answers and assign this question to a question pool.
9. Click Save.
10. Questions will display on the next page and at the bottom of the page appears an option to Insert New Question.
11. Select the appropriate question type and continue creating the assessment.
12. Once complete, click the Assessments link located at the top left corner of the page.

Once you have created an assessment, it must be published before worksite participants can view it. Complete the following steps to publish an Assessment:
1. Locate the assessment and select the Settings link located below the assessment title.
2. The next page displays all assessment settings (many settings already exist due to the original assessment type that was selected when creating the assessment).
3. Select the arrow icon to the left of Delivery Dates and complete the Available, Due and Retract Date information.

**Note:** This is a good time to review the other settings to ensure accuracy. The other settings include:

- **Assessment Introduction** – Allows the creation of an introduction to the assessment.
- **Delivery Dates** – Set Available, Due and Retract Date information.
- **High Security** – Specify allowed IP addresses for accessing this assessment.
- **Assessment Organization** – Provides options to change Navigation, Question Layout and Numbering.
- **Submissions** – Allows for specifying the number of submissions allowed per student and determines whether late submissions will be accepted.
- **Submission Message** – Allows instructor to create a submission message which will appear to the student after completing the assessment and provides an option to redirect the student to a website upon assessment completion.
- **Feedback** – Allows instructor to select feedback options, such as question-level feedback.
- **Grading** – Provides for anonymous grading options and determines whether the exam grade will appear in the Gradebook tool.
- **Graphics** – Allows for background color or background image.
- **Metadata** – Allows for additional metadata to be added to the assessment.

4. Once all settings have been verified, click Save Settings to save or Publish to distribute the assessment.

**Note:** Once an assessment has been published, only the delivery dates and the Gradebook option settings can be altered.

Complete the following steps to score an Assessment:
1. Once students submit the assessment, the instructor will see a Score option appear below the published assessment.
2. Click the Scores link. The Sakai system will automatically score the questions having quantitative responses.
3. To grade the qualitative responses, click on the Submission ID.
4. Click Update.
5. Other options within the Scores page include:
   - **Submission Status** - Determines which participants have submitted the assessment.
   - **Total Scores** – Displays a summary of scores and provides an area for instructors to provide feedback if desired.
   - **Questions** – Displays student responses by question.
   - **Statistics** – Provides additional statistics.
To export an Assessment, complete the following steps:

*Note: This currently works in Internet Explorer only.*

1. Access the worksite.
2. Click on the Tests & Quizzes tool.
3. Within the Core Assessments section, locate the assessment to be exported.
4. Click the Export link.

Core Assessments

<table>
<thead>
<tr>
<th>Title</th>
<th>Settings</th>
<th>Remove</th>
<th>Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>English 101 Midterm</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exam 1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

5. Click Download to generate an IMS QTI-Compliant XML file to download to your computer.

6. The XML will appear in a new window.
7. Select File, Save As and select the appropriate save location.

To import an Assessment, complete the following steps:
1. Access the worksite.
2. Select the Tests & Quizzes tool.
3. Click the Import button.

Assessments

New Assessment

Create a new assessment

Choose Existing Assessment Type: select (optional)
Title
Import assessment

4. Click Browse to find the IMS QTI-Compliant file.
5. Locate and select the file on your computer and then click Open.
6. Select the Import button.
8.13 Assignments Tool
The Assignments tool allows instructors to create, distribute, collect and grade online assignments. Sakai offers two assignment tools. One Assignment tool possesses a grading component and is typically used in a course worksite. The second Assignment tool does not contain a grading component.

To create a new Assignment, complete the following steps:
1. Access the worksite.
2. Select the Assignments tool.
3. Click the Add link located at the top of the page.
4. The next screen displays the Add Assignment page.
5. Enter Assignment title.
6. Select an Assignment Open Date.
7. Select an Assignment Due Date.
8. Select an Accept Until date (Note: Students will not be made aware of the Accept Until date).
9. Select whether student Assignment submissions should be Inline (text), Attachments, or Both.
10. Select a Grade Scale option.
11. Enter the point value if this Assignment is for points.
12. Use the rich text editor to complete the Assignment instructions or copy and paste text from another document.
13. Select whether to add the due date to the Schedule.
14. Choose whether to announce the Open Date.
15. Select whether to add an Honor Pledge.
16. Choose whether to add this Assignment to the Gradebook tool.
17. Select whether to display this Assignment to the entire worksite or to display to selected groups/sections only.
18. Select the Add Attachments button if needed.
19. Click the Preview button to preview this Assignment.
20. Select Save Draft to save as a draft or click the Post button to release the assignment to students.

To grade an Assignment, complete the following steps:
1. Access the worksite.
2. Select the Assignments tool.
3. An Assignment list displays. Click the Grade link below the Assignment to grade.
4. A list of students displays. Click the student name to grade the Assignment.
5. Enter comments in the Instructor Comments field.
6. Assign a point value (if applicable) in the Grade field.
7. The instructor may also select the Allow Resubmission box if necessary.
8. Click Save.

Complete the following steps to release assignments to the Gradebook:
1. When all submitted Assignments have been graded, the instructor must release the grades to the Gradebook.
2. Access the worksite.
3. Select the Assignments tool.
4. An Assignment list displays. Click the Grade link below the Assignment to release grades.
5. A list of student submissions and grades will appear. Click the Release Grades link. This will release grades to the students and to the Gradebook. Students will now be able to view their grade within the Assignments tool and the Gradebook.

### 8.14 Gradebook Tool

The Sakai Gradebook tool allows instructors to store and distribute grade information to students online. The Gradebook tool is integrated with Samigo (Tests & Quizzes) and with the Assignments tool making grade calculations within the Gradebook automatic. The Gradebook allows for point value, letter grade, or pass/fail scoring. In addition, the Gradebook tool enables Instructors to overwrite a student’s overall course grade.

To manage the Gradebook, complete the following steps:
1. Access the worksite.
2. Select the Gradebook tool. Gradebook overview displays.

#### Gradebook

<table>
<thead>
<tr>
<th>Overview</th>
<th>Roster</th>
<th>Add Assignment</th>
<th>Grade Options</th>
</tr>
</thead>
</table>

#### Overview

Click a title to see the assignment summary or to grade the assignment.

Currently, students can see their assignment scores, but not their cumulative score, or course grade. Change grade options.

#### Assignments

<table>
<thead>
<tr>
<th>Title</th>
<th>Due Date</th>
<th>Avg</th>
<th>Points</th>
<th>From</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment 1</td>
<td>Oct 31, 2006</td>
<td>33%</td>
<td>15</td>
<td>Assignments</td>
</tr>
<tr>
<td>Exam 1</td>
<td>Mar 15, 2007</td>
<td>16%</td>
<td>60</td>
<td>Tests &amp; Quizzes</td>
</tr>
<tr>
<td>Course Grade</td>
<td></td>
<td>2%</td>
<td>75</td>
<td></td>
</tr>
</tbody>
</table>

3. Click the Assignment title to view the grades.

**Note:** The next screen enables the user to sort grades by course section/group.

**Note:** If this Assignment grade came from the Assignments tool or the Tests & Quizzes tool, the grade cannot be changed from within the Gradebook tool; the grade must be changed from within the tool that generated the grade.

4. To view a list of grades by student or to export grades into Excel or CSV file, click the Roster link located at the top of the page. The export options are located at the bottom of the Roster page.
5. To manually add an assignment to the Gradebook, click the Add Assignment link located at the top of the Gradebook page.

Gradebook

Add Assignment

Submit this form to add an assignment to the gradebook.
* = required

Assignment

Title *

Assignment Point Value *

Due Date (mm/dd/yy)

Include this assignment when calculating final grade

Submit  Cancel

6. Complete the required information and click Submit.

To manually enter grades into the Gradebook, complete the following steps:
1. Click the title of the Assignment.
2. A student roster displays.
3. Enter the point value of each student’s Assignment grade in the Points text field located next to each student name.
4. Click Save.

To edit Gradebook options, complete the following steps:
1. Access the worksite.
2. Select the Gradebook tool.
3. Click the Grade Options link located at the top of the page.
4. The Grade Options page displays. See the following screenshot for the editable options.

5. Click Save.

8.15 Site Info Tool
The Site Info tool allows site participants to see general information about the worksite. This includes the description of the worksite, the site creation date, and users with the ability to join.

Note: The site owner/creator is able to edit Site information via this tool.

To edit Site Information, complete the following steps:
1. Access the worksite.
2. Select the Site Info tool.
3. Click the Edit Site Information link located at the top of the screen.
4. Make the necessary changes to the site description and/or short description.
5. Update the Site icon if desired.
6. Change the contact information if necessary.
7. Click Continue.
8. Verify the information is correct and click Finish.

Complete the following steps to manage course participants:
1. Access the worksite.
2. Select the Site Info tool.
3. Scroll past the site information until the list of participants is reached.
4. A list of worksite participants, active status and permissions role displays.

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Status</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dittlof, Kim (kim_fac)</td>
<td>Instructor</td>
<td>Active</td>
<td>☐</td>
</tr>
<tr>
<td>Dittlof, Kim (kim_student)</td>
<td>Student</td>
<td>Active</td>
<td>☐</td>
</tr>
<tr>
<td>Faculty, Kara (kara_fac)</td>
<td>Instructor</td>
<td>Active</td>
<td>☐</td>
</tr>
<tr>
<td>Instructor, Instructor (instructor)</td>
<td>Student</td>
<td>Active</td>
<td>☐</td>
</tr>
</tbody>
</table>

5. To change the permissions role for a particular user, select the Role dropdown box and select the new Role.
6. To make a worksite participant inactive, select the Status dropdown box and select the new status.
7. To remove a participant from your worksite, click the Remove checkbox.
8. When all changes are complete, click the Update participants button.

Complete the following steps to manually add participants to a worksite:
1. Access the worksite.
2. Select the Site Info tool.
3. Click the Add Participants link.
4. Type the username(s) of the participant(s) to be added.
5. Select a method of assigning roles to these new participants.

Participant Roles

- Assign all participants to the same role
- Assign each participant a role individually

6. Click Continue.
7. Select the role(s) to assign to the new participant(s).
8. Click Continue.
9. Select email option if needed.
10. Click Continue.

Complete the following steps to edit the available worksite tools:
1. Access the worksite.
2. Select the Site Info tool.
3. Click the Edit Tools link.
4. Place a checkmark next to the desired tools or remove the checkmark next to the tools to be deleted.
5. Click Continue.
**Note**: If Web Content or News is selected, the user is prompted on the next screen to enter a title and URL for Web Content and/or a title and RSS URL for the News. Web content allows instructors to bring external websites into the worksite.

Complete the following steps to manage Worksite access (publish/unpublish):

1. Access the worksite.
2. Select the Site Info tool.
3. Click the Manage Access link located at the top of the page.
4. The next screen displays whether or not this worksite is published.
5. To publish/unpublish worksite, click the checkbox next to Publish Site.
6. In the event that the worksite is to allow for global access, select the ‘Can Be Joined By Anyone With Authorization To Log In’ checkbox and select an appropriate default role for users joining the worksite.
7. Click Update.

### 8.16 Provisional Tools

Although not regarded as a fully vetted core component of the enterprise bundle, a tool is considered provisional when it is mature enough to be included in a Sakai release distribution. Provisional tools, though included in a release, are hidden or *stealthed* by default.

#### Administrator

- Complete the following steps to unhide or unstealth a Provisional Tool:
  1. Access the sakai.properties file.
  2. Locate the following line within the sakai.properties file:
     
     ```
     stealthTools@org.sakaiproject.tool.api.ActiveToolManager=
     ```
  3. Locate the tool(s) to unstealth and remove them from this list.

**Note**: Once a tool is unstealthed, the administrator may need to add/remove it from a worksite template.

#### 8.16.1 RWiki (Provisional)

Rwiki is a wiki tool for Sakai that gives worksite members the ability to create and update wiki pages within the worksite.

Complete the following steps to use the Wiki:

1. Access the worksite.
2. Select the RWiki tool.
3. Click the Edit link to edit the Wiki.
4. Edit and click Save.

#### 8.16.2 Super User (Provisional)

The Sakai SuperUser tool (sakai.su) enables administrators to login as another user. The code was developed at Texas State University for their local brand of Sakai called TRACS (Teaching Research and Collaboration System) and is to be added and utilized in the Administrative Workspace. SU features a simple form in which the administrator types the user ID of the user he or she wishes to login as or *become* in the system.

After deployed, the SU tool will appear in the list of tools in the Administrative Sites tool. Since SU is intended for administrators only, it will not appear in the list of tools for the Worksite Setup tool.
Administrator – Complete the following steps to add the Super User tool to the Administrative Workspace:

1. Access the Administrative Workspace.
2. Select the Sites tool.
3. Click on the link to access the !admin site.
4. Scroll down and click the Pages button.
5. Click the New Page link.
6. Assign a title to the page, such as “Super User.”
7. Click the Tools button.
8. Click the New Tool link located at the top of the page.
9. Click the radio button next to Admin: Become User (sakai.su).
10. Click the Save button.

8.16.3 Roster
The purpose of the Site Roster tool is to provide a user with a list of all users in the worksite. The Roster tool provides a link to individual user’s profile.

8.16.4 JForum
JForum Discussion & Private Messages is an easy-to-use, robust tool that offers industry-standard discussion functionality to users. Instructors can set up unlimited categories and forums, moderate topics (move, edit, delete, lock, or unlock topics), read recent topics and mark them as read, watch and bookmark topics, and more. Additionally, JForum comes with built-in private messaging that allows site members to communicate privately while discussing issues or collaborating on projects.

8.16.5 Melete
Melete is a lesson builder tool developed for Sakai. Melete allows instructors to publish learning sequences that can be created by using a rich text editor, upload learning objects, or point to existing URL resources. Instructors can design content that supports instructor facilitated learning or system managed self-study. Lessons can be released automatically based on start and stop dates.

8.16.6 Twin Peaks
This tool provides the capability to search external repositories while using the rich content editor. TwinPeaks is suitable for use on development servers and can be used to allow sites to begin the development of their DR OSID implementations. To enable TwinPeaks, set the following sakai.properties setting to true: wysiwyg.twinpeaks=false.