Setting up and publishing a site: A simple outline of the process

Excerpted and adapted from the CTools Help site

There are three basic steps for starting CTools and creating a project or course website.

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

1. Log in
2. Create or Duplicate a website
3. Publish your website

These steps described in detail in the section "Setting Up and Publishing a Course or Project Website" in this Online Help Guide.

Step 1 - Creating a new site - Getting Started

A. Open CTools:

http://ctools.umich.edu

B. Click the Login button in the upper-right corner of the window and log in.

C. Open your workspace. (If it is not already open, click the My Workspace tab.)

D. Click Worksite Setup in the menubar.

E. Click New... in the upper left corner of the main window OR Double-click on the Worksite Title that you want to duplicate, click on Site Info, select Duplicate Site, then skip to step 4-1/2.

Step 2

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

- Project website -- For a website for a project.

B. Click Continue.

Step 3

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

(For Project Sites only)

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

2. 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.

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

4. Click **Continue**. (And continue with Step 5.)

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Step 5

1. In the Worksite Setup window that appears, check the boxes next to the tools and features you would like for your site. **RESOURCES**

   (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.)

2. 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.

3. Click **Continue**.

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Step 6 - Publishing your site and making it joinable

The TEMPLATE site is unpublished; only members assigned the role of “Owner” or “Organizer” can access an unpublished site.

Publishing your site makes it available to all assigned site participants; including those whose roles allow them partial and limited access to the site. Global access settings allow you to decide who has access to your published site.

1. 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.)

2. 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.) TENURE CASE PROJECT FOLDERS SHOULD MAINTAIN PRIVATE ACCESS

SPECIAL NOTE ON ACCESS: When instructors create a course site the students registered for that course will automatically become members of the site. This list is downloaded from a global university database. To become a member of a private, published project site, the owner must key in individual addresses of each member. If you wish to allow access to a large number of participants, the CTools staff can help you manually add participants to your site upon request.

4. Click Continue.

Step 7

1. Confirm the information for your site in the window that appears.

2. If you need to make a change, click the Back button on the CTools screen (not your browser’s back button).

3. 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.

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.

1. Open your workspace by clicking the My Workspace tab.

2. Click Worksite Setup in the menubar.

3. Check the box next to the site you would like to publish.

4. Click Revise.

5. Click the Site Access button.

6. Click the radio button next to Publish site.

7. 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).

8. 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.
Unpublishing a site

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

1. To unpublish a site, first open the site.
2. Click Site Info in the left-hand menubar.
3. Click the Site Access link along the top of the window.
4. Uncheck the box next to "Publish Site" by clicking on the box.
5. Click Update.

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.

1. Click Worksite Setup in your workspace. You will see a list of sites you have created and sites to which you have access.
2. Check the box next to the site to which you would like to add one or more participants (or students).
3. Click Revise.
4. Click Add Participants.
5. Type the participant's uniqname. You can type more than one uniqname in the box.
6. Choose whether to give all your newly added participants the same role or different roles.
7. Click Continue.
8. In the next window, if you chose to give all your participants the same role, pull down the menu by each uniqname and choose either:

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.
9. Click **Continue**.

10. On the next page, you have the option to automatically send email to the newly-added participants notifying them of the site's availability.

11. Click **Continue**.

12. Click **Finish**.

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**UM Information Technology Policies and Guidelines**

This web site features the University of Michigan's most relevant information technology policies and guidelines.

http://www.umich.edu/~policies/

Are you finding what you're looking for? Please send feedback about this online help guide to ctools-doc-comments@umich.edu Thanks! (For questions about using CTools, send email to ctools-support@umich.edu)

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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 following information:

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![Key Deer](image)

**Key Deer**

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