# **CANVAS OBSERVER GUIDE**





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# Introduction



### What is the Observer role?

In Canvas, the Observer role can be used to enroll parents, mentors, and guests who would like to participate in a Canvas course but do not need to earn course credit. Observers have limited permissions that allow them to see what is going on in a course without interrupting the flow of daily course communication. Like students, Observers cannot view a course until it is published and the course has started.

To learn more about the observer role, view the Parent Registration and Student Observation video.

Observers may be able to view assignments, course events, and grades for a student in the Canvas Parent app.

### **Observer Role Use**

Observers can view course data but cannot participate in all Canvas areas. Observers may be added to a course to observe course data. For instance, instructors sometimes invite guests to join their courses, such as for a web conference. Enrolling the guest with an observer role allows access to the course without being able to affect any course data or participation.

The main use of the observer role is to link a user to a student. Observers can be linked to a student or multiple students and view the student's data in the course. Parents are often enrolled as observers and linked to students, especially in K12 environments. Observers cannot submit work on behalf of the students they observe, but they can see student grades, assignments and events, and course interactions.

### **Observer Access in Canvas**

To learn more about observer participation, view the Observers Visibility and Participation PDF.

### Observers can

- · View and read announcements
- · View assignments index page
- · View the calendar
- · Join conferences, if invited
- · Join collaborations, if invited
- View personal inbox
- · Send conversation messages to instructor and student they are observing
- · View the dashboard
- View and read discussions
- · View files unless they are locked
- · View grades of student they are observing and filter, view scores and dates, and print grades
- View modules and see due dates, point values, etc.
- · View pages and contribute if the instructor enables the Anyone can edit it setting
- View profile pictures, if available
- View syllabus
- · View outcomes
- View quizzes index page





#### **Observers cannot**

- · Comment on announcements or discussions
- Submit assignments or guizzes
- View course rosters
- · Send conversation messages to students in the course they are not observing
- View locked files or folders
- Join groups
- · View unpublished courses
- Access the Chat tool
- · Reserve appointment slots in the Scheduler

### **Observer Limitations**

- · Observers are bound to the same prerequisites, requirements, lock dates, etc. as the student they are observing.
- · Observers can only view the content the student they are observing has access to.
- Observers can view assignments even if the student they are observing has not completed them unless the assignments are locked.
- Each Instructor can customize the links in the Course Navigation and limit the number of features that Students and Observers can see. Observers may or may not see links to certain features.



### How do I sign up for a Canvas account as a parent?

Parents can sign up as an observer in Canvas. Observers can link their Canvas account to their student's account so they can see assignment dues dates, announcements, and other course content. Observers can view the course content but cannot participate in the course.

This lesson is for parents who do not have a Canvas account and want to observe their students in their courses.

If you already have an account from your student's institution, log in to Canvas using the credentials given to you.

#### **Notes:**

- If the registration banner is not available in the login page, the institution has not enabled this feature. Please contact your student's institution for assistance. (If you are a Canvas admin, learn how to enable the banner through Canvas authentication.)
- To observe a student, you must know the student's Canvas username and password.
- The student must be enrolled in the course and must accept the course invitation before you can sign up to observe the student. If you receive an *invalid username or password* message during the signup process and the student's credentials are correct, check with the student to verify that he or she has received and accepted the course invitation.
- Once you have an account, you may be able to view student information through the <u>Canvas Parent app</u>.
  Access to the Canvas Parent app is controlled by the student's institution. If you already have an account from your student's institution as an observer, you can always view student information through the Canvas Parent app.

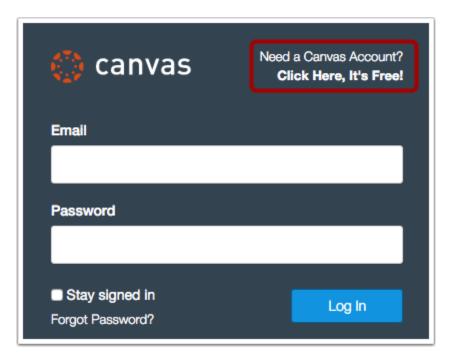
# **Open Canvas URL**



In a browser window, enter the institution's Canvas registration URL (e.g. canvas.instructure.com).



## **Click to Register**



Click the account link at the top of the page.

# **Sign Up As a Parent (Free Account)**

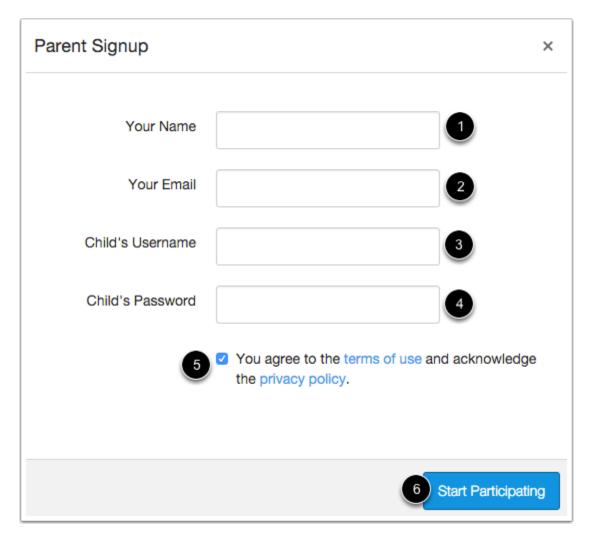


Click the Parents sign up here link.





# **Enter Signup Details**

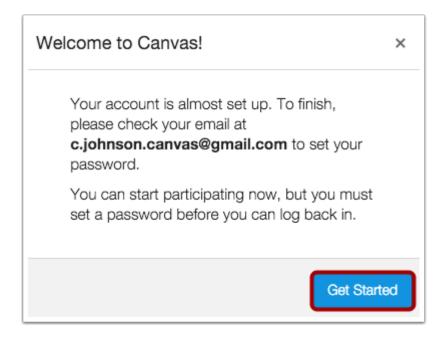


### Enter the following information:

- 1. Enter your name in the name field.
- 2. Enter your email in the email field.
- 3. Enter your child's username in the child's username field.
- 4. Enter your child's password in the child's password field.
- 5. Agree to the terms of use by clicking the **You agree to the terms of use** check box.
- 6. Click the **Start Participating** button.

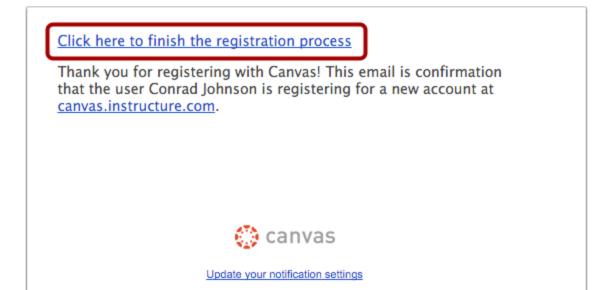


### **Use Canvas**



While your account is not entirely set up, you can begin participating in Canvas immediately by clicking the **Get Started** button. To finish registering for Canvas, log into your email account.

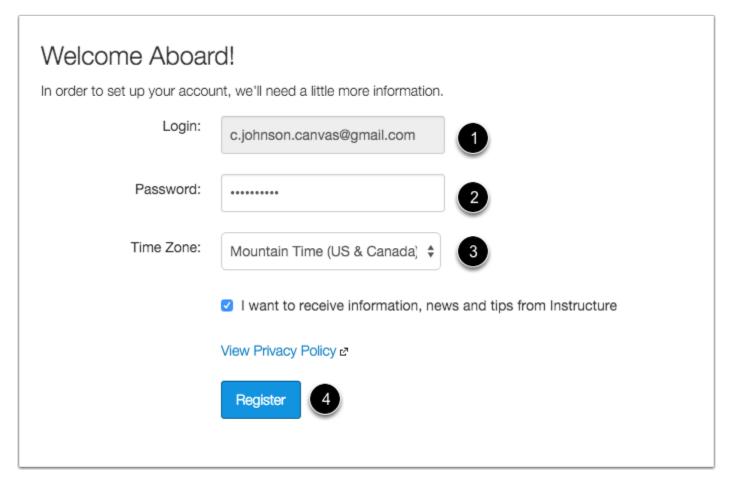
# **Complete Registration Process**





Open the email from Instructure Canvas. Click the link provided to visit the provided URL and complete the registration process.

# **Register for a Parent Account**

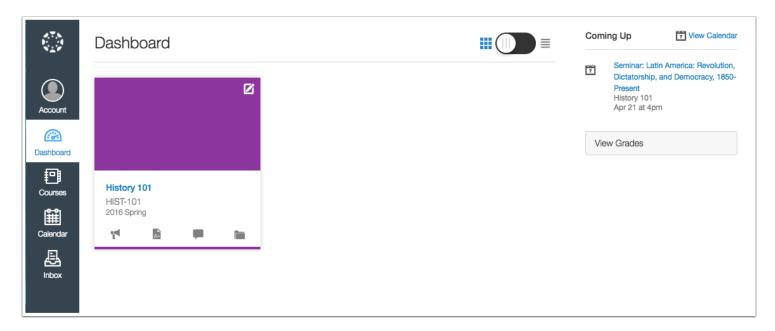


To complete the registration process fill out the following fields:

- 1. Verify your email in the login field.
- 2. Set your password by typing in the password field.
- 3. Set your timezone by selecting the time zone drop-down menu.
- 4. Click the Register button. You will be redirected to the Canvas URL login page for your account.

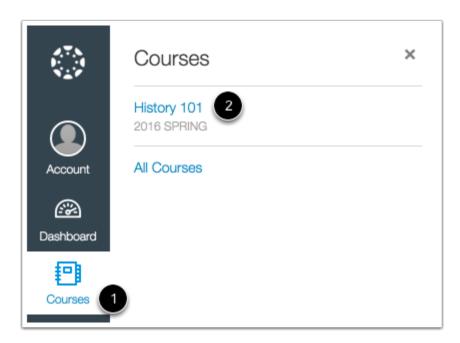


### **View User Dashboard**



View the user dashboard for your Canvas account.

### **View Course**



In Global Navigation, click the Courses link [1], then click the name of the course [2].





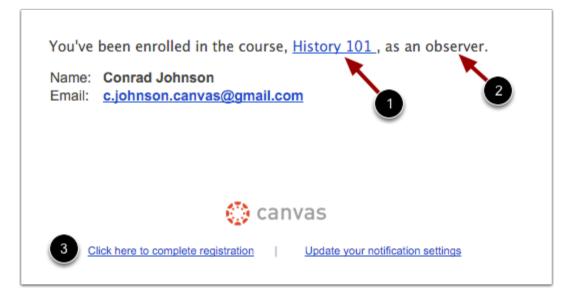
Learn how to observe additional students in your account.

# How do I accept an invitation to join a course as an observer?

Instructors invite observers to join their courses. By default, when you are added to a course, you will be able to view the course without having to accept a course invitation.

Note: If you do not receive an invitation to join the course, please contact the instructor.

### **Receive Email Invitation**



You will receive the course invitation via email. The invitation will include the course name [1] and your user role in the course [2]. To complete registration, click the **Click here to complete registration** link [3].

**Note:** You will have to sign in to Canvas to accept the course invitation. If you don't have a Canvas account you'll be able to create one as part of the course invitation.



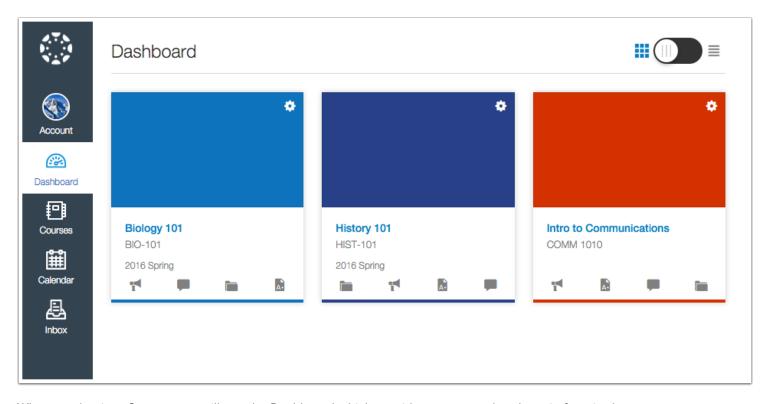
# **Complete Registration**

Welcome Aboar	d!
In order to set up your accou	nt, we'll need a little more information.
Login:	c.johnson.canvas@gmail.com
Password:	
Time Zone:	Mountain Time (US & Canada) 💠
3	$\hfill \square$ I agree to the terms of use $\hfill \square$ and privacy policy $\hfill \square$ .
4	Register

If you need to set up an account, you will need to create a password [1], enter your time zone [2], and click the terms of use checkbox [3]. Then click the **Register** button [4].



### **View Dashboard**



When you log into Canvas, you will see the Dashboard which provides access and updates in favorited courses.



# **Profile and User Settings**



### How do I reset my password?

If you created your own Canvas account, you can reset your password through a link in the password request email.

If your login credentials were provided to you by your institution, you may not be able to reset your Canvas password on your own. Additionally, if you log in to Canvas using your institution's authentication system, you may need to reset your password using your institution's website. If you request a password reset and the email does not have a password reset link, it will include your Canvas email address and the institution that provided you with your password. To change or verify your password, contact the system administrators at your institution.

**Note**: If you can log in to Canvas and want to *change* your password, please visit the <u>How do I change my login</u> password? lesson.

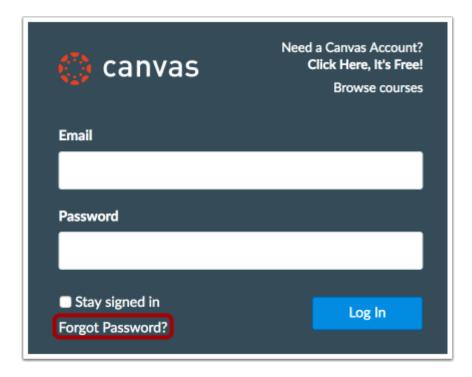
#### **Email Errors**

If you enter your email address and never get a password reset email, review the following password tips.

- Have you typed your email address correctly? Sometimes email addresses can be misspelled.
- Are you accessing the correct Canvas URL? You will not get the reset email if you are trying to reset your password on a site where you are not enrolled (such as canvas.instructure.com instead of myinstitution.instructure.com).
- Is your Canvas email sponsored by your institution? If your mail email address is part of a campus firewall system that blocks emails from mass senders, you won't be able to receive the email. Contact your institution's IT department for assistance.
- Are you the owner of your email address? If your email address is owned by someone else and you can't receive email for that address, you won't be able to get the reset email. Contact the owner of the email address for assistance.



### **Reset Password**

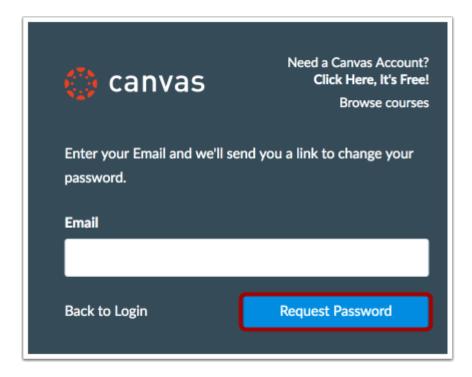


In a new browser window, open to your Canvas login page. Click the Forgot Password? link.

**Note:** If your login screen does not show the password reset link, contact your institution for assistance.



### **Request Password**



Enter the login information associated with your Canvas account and click the Request Password button.

**Note:** The password reset field verifies password reset information by user login. Depending on your institution, login information may vary.

### **Check Email**

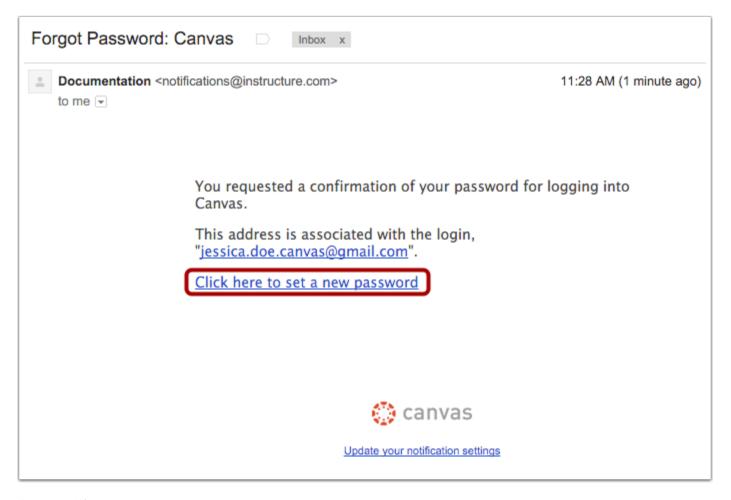


Return to your email account and sign in. Open the *Forgot Password* email. (If the email is not in your Inbox, check your Spam folder.)

If your user login is associated with multiple email addresses, password reset instructions will be sent to each address.



## **Open Password Link**



Click the Click here to set a new password link.

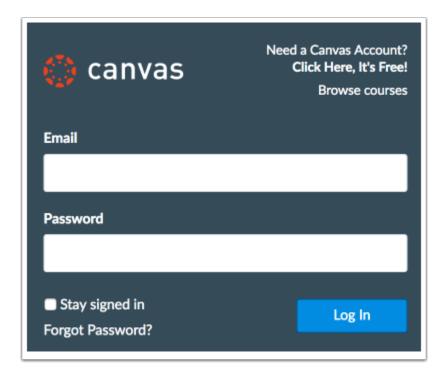


## **Change Password**

Change login password for Jessica Doe	
jessica.doe.canvas@gmail.com	
New Password:	
Confirm New Password:	
Update Password	

Type in a new password and then confirm that password by typing it again. Click the **Update Password** button.

# Log in to Canvas



With your login credential and new password, log in to Canvas.





### How do I set my Canvas notification preferences?

Canvas includes a set of default notification preferences you can receive for your courses. Notifications are sent to <a href="Canvas contact methods">Canvas contact methods</a> as specified in your account. However, you can change the default settings by setting your own notification preferences. These preferences only apply to you; they are not used to control how course updates are sent to other users. To learn more about each notification, default settings, and notification triggers, view the <a href="Canvas Notifications PDF">Canvas Notifications PDF</a>.

Notifications are sent as one of four delivery types: send right away, daily summary, weekly summary, or don't send. If you change a setting, the change is made immediately to your account.

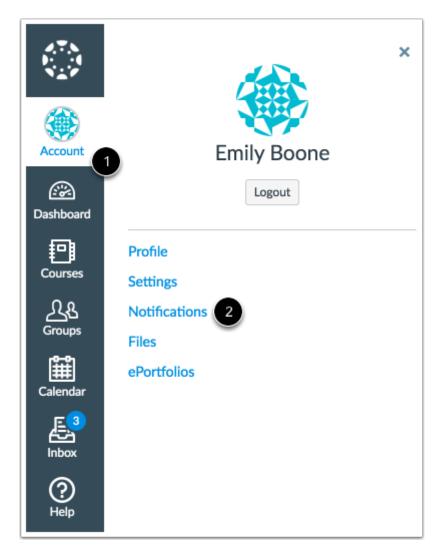
Notification settings apply to all of your courses; you cannot change settings for individual courses.

You can reply directly to email notifications outside of Canvas and have the reply appear in Conversations. However, please be aware that attachments added as part of an external reply are not included with the message shown in the Canvas Inbox.

**Note:** The Canvas by Instructure app supports setting notification preferences. However, setting preferences inside the app will override preferences in the browser version of Canvas, and daily and weekly preferences are not supported. Learn about setting preferences in the Canvas app for <u>Android devices</u> and <u>iOS devices</u>.



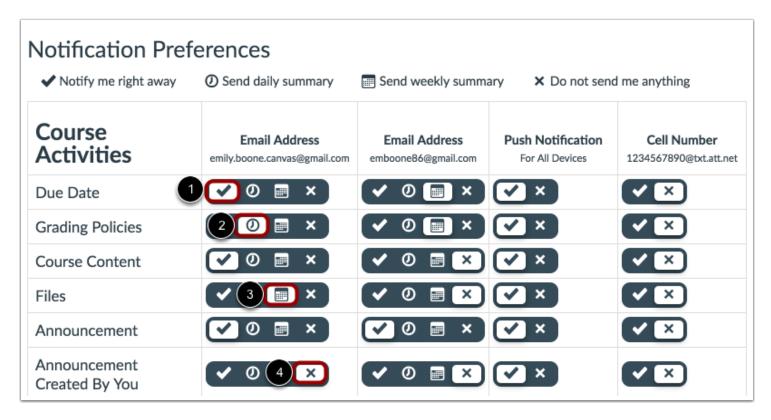
# **Open Notifications**



In Global Navigation, click the **Account** link [1], then click the **Notifications** link [2].



### **Set Notification Preferences**



Each notification is set to a default preference. To change a notification for a contact method, locate the notification and click the icon for your preferred delivery type.

To receive a notification right away, click the **check mark** icon [1]. These notifications are delayed by one hour in case an instructor makes additional changes, which prevents you from being spammed by multiple notifications in a short amount of time.

To receive a daily notification, click the **clock** icon [2].

To receive a weekly notification, click the **calendar** icon [3]. The date and time of your weekly notifications are posted at the bottom of the notifications page.

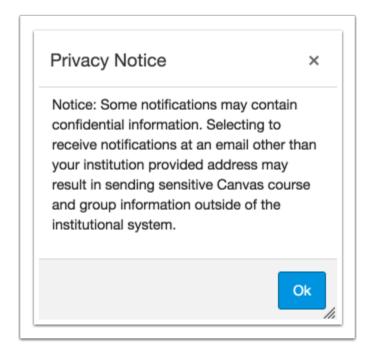
If you do not want to receive a notification, click the **remove** icon [4].

### **Notes:**

- Each set notification preference will automatically apply to all of your courses. They cannot be set individually.
- Twitter and SMS notification preferences do not support daily summary or weekly summary options.
- Unregistered contact methods will appear in notification preferences but will not receive notifications until you confirm the registration.



#### **View Privacy Notice**



If you've set a notification preference for an email address that is outside your institution, you may see a privacy warning. You can close the warning by clicking the **OK** button. Once the warning has been displayed, it will not display again.

### **Set Push Notifications**



If you have enabled push notifications in the Canvas by Instructure app, the Notifications page displays a Push Notification column. Please be aware that push notifications can only be sent to your mobile device right away or not at all—daily and weekly notification options are not supported.



Additionally, setting preferences inside the app will override preferences set in the notifications page.



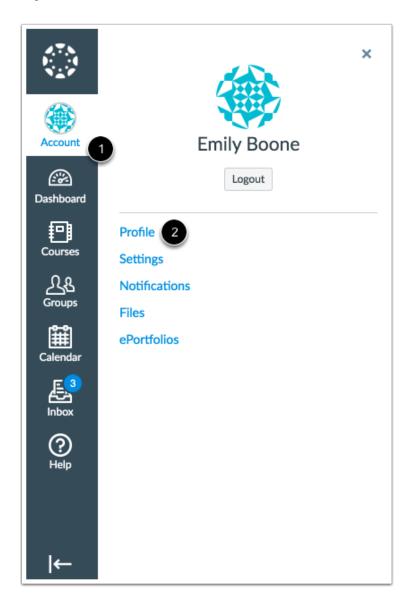
# How do I edit my profile in my user account?

Some institutions may enable a feature in Canvas called Profiles. Profiles allows you to update your name, preferred contact methods, and any personal links for your account.

If you want to view a video about personal settings, you can watch <u>User Settings & Profile Picture (Video)</u>.

**Note:** If you do not see the Profiles tab in your user navigation menu, this feature has not been enabled for your institution.

## **Open Profile**

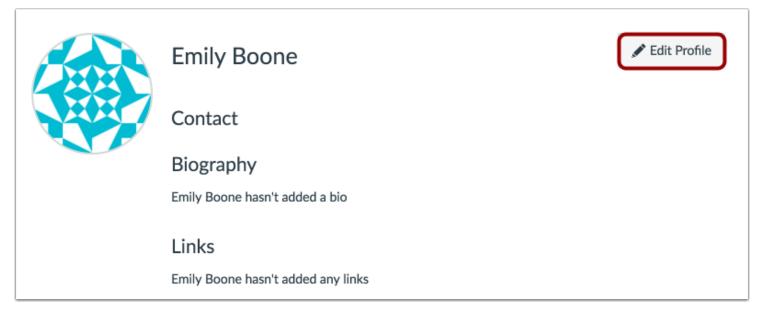






In Global Navigation, click the **Account** link [1], then click the **Profile** link [2].

### **Edit Profile**



Click the **Edit Profile** button.

### **Edit Profile Picture**



To upload a profile picture, click the **profile picture** icon. Learn more about how to <u>upload a profile picture</u>.





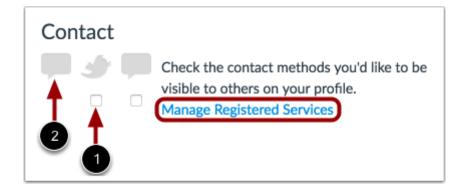
**Note:** Profile pictures are a separate permission from profiles. If you do not see a placeholder picture, your institution has not enabled this feature.

#### **Edit Name and Title**



Type your name in the name field [1]. Type your title in the title field [2].

#### Add Contact Methods



If you have connected to any <u>web services</u>, click the checkbox underneath the web service to indicate how you wish to be contacted via that service [1]. To add additional services, click the **Manage Registered Services** link. Please note that any selected services will not be shared with other course/group members unless you have previously selected the sharing checkbox in the Manage Registered Services page.

The Discussion icon [2] automatically appears as a contact method for Admins so users can contact them through Canvas Conversations. It cannot be selected by any other uses.

**Note:** As created in your user profile, email addresses do not appear as a contact method and are only used for Canvas notifications. Canvas users should contact each other via Conversations.

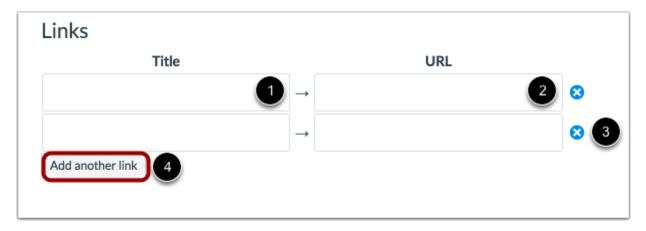


#### **Edit Bio**



Type your biography in the bio field. You can add hobbies and interesting facts about yourself.

#### **Edit Links**



To add personal links to your profile, such as personal websites, blogs, or portfolios, enter the title of the link in the title field [1]. Type the URL in the URL field [2]. Click the **remove** icon to delete the link [3]. Click the **Add another link** button to add another link [4].

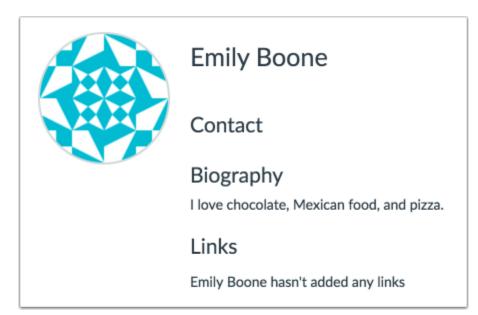
### **Save Profile**



Click the Save Profile button.



# **View Updated Profile**



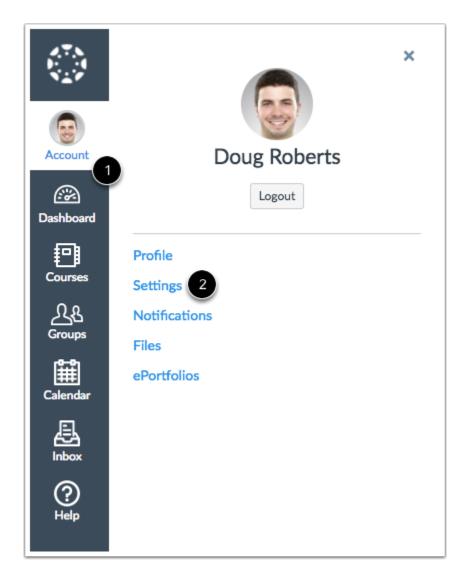
View the newly created profile.



### How do I connect to web services outside of Canvas?

Canvas is integrated with a number of third party web services. Most of these services can be configured from the user settings page.

# **Open User Settings**



In Global Navigation, click the **Account** link [1], then click the **Settings** link [2].



### **Link Services to Profile**

# Web Services

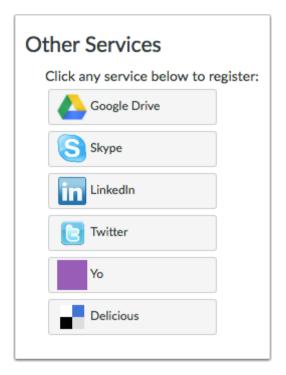
Canvas can make your life a lot easier by tying itself in with the web tools you already use. Click any of the services in "Other Services" to see what we mean.

Let fellow course/group members see which services I've linked to my profile

When you register other web services with Canvas, you can integrate your account with services you already use. Each of these services also generates a contact method for other people in your course or group. If you want to show any of your registered web services on your profile page, click the **Let fellow course/group members...** checkbox. You can select specific services to display by editing your profile.

Note: If you do not have a profile page, your institution has not enabled this feature.

### **Connect to Web Services**



You may be able to integrate Canvas with the following web services:

Google Drive





- <u>Twitter</u>
- SkypeLinkedIn
- Delicious
- <u>Yo</u>

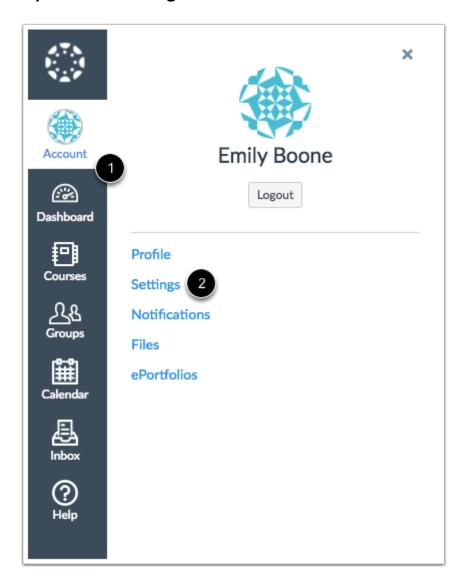


# How do I change the language preference in my user account?

English is Canvas' language default, but you can choose to view the Canvas interface in another language.

**Note**: Instructors have the option to change the language preference for their courses. If you enroll in a course where the instructor has made this change (most often for a foreign language course), the course language will override the language in your user settings.

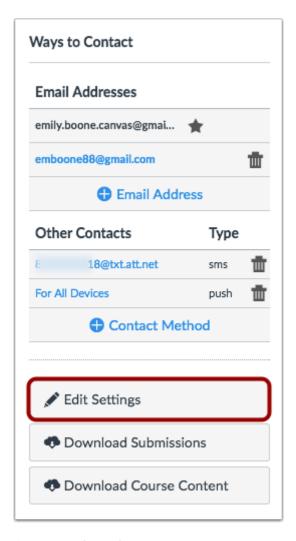
### **Open User Settings**



In Global Navigation, click the **Account** link [1], then click the **Settings** link [2].



## **Edit Settings**



Click the **Edit Settings** button.

# **Select Language**

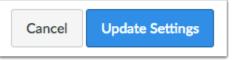


In the Language drop-down menu, choose your preferred language.



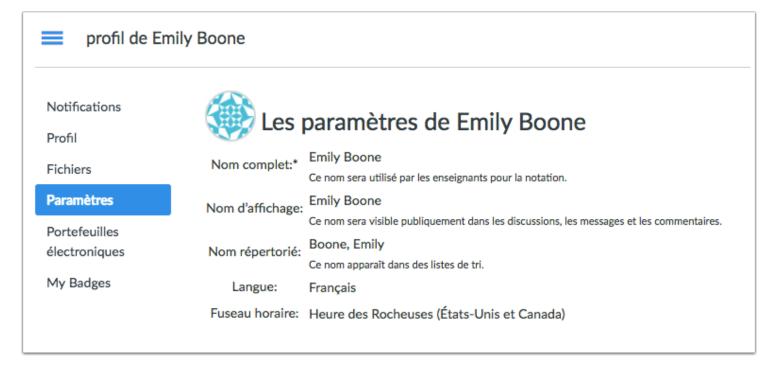


## **Update Settings**



Click the **Update Settings** button.

# **View Preferred Language**



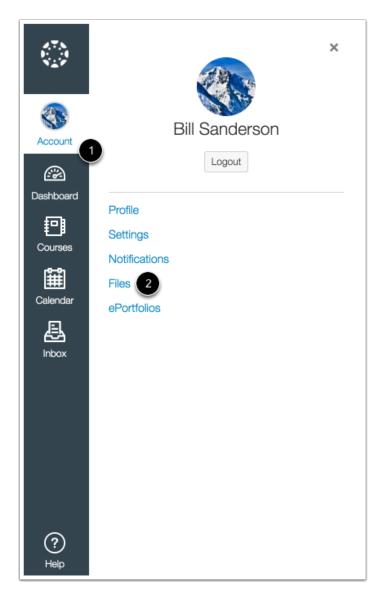
View Canvas in your preferred language.



# How do I view my user files as an observer?

Personal files include profile pictures and other files uploaded to your personal Canvas file storage area. By default, each user has 50 MB of storage space in Canvas.

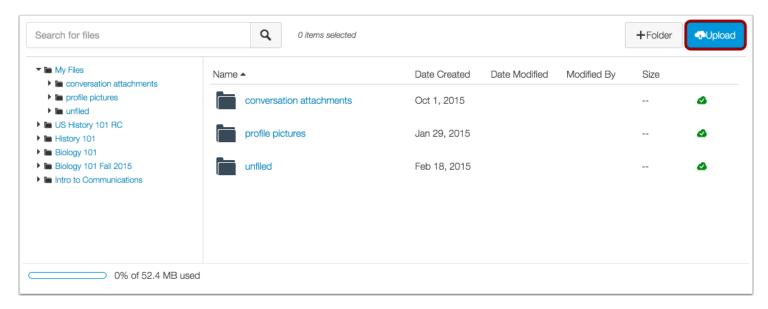
# **Open Files**



In Global Navigation, click the **Account** link [1], then click the **Files** link [2].

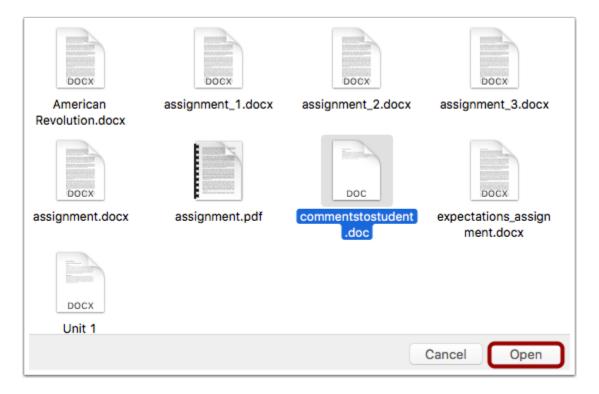


## View User Files and Upload a File



View your files. To add a file, click the **Upload** button.

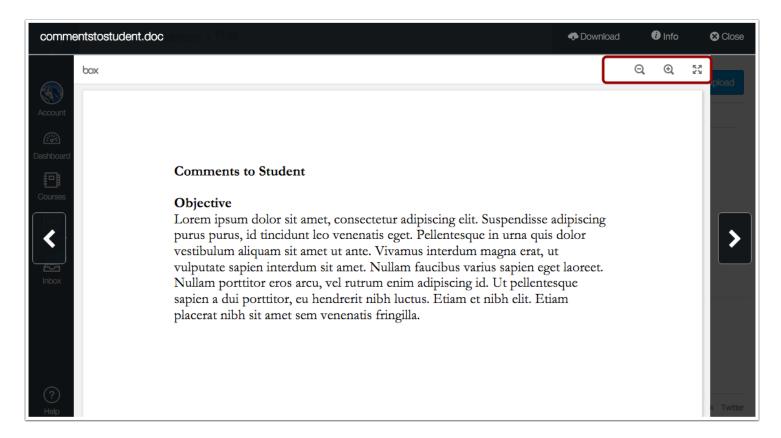
# **Select File From Computer**





Browse to a file on your computer and click the **Open** button.

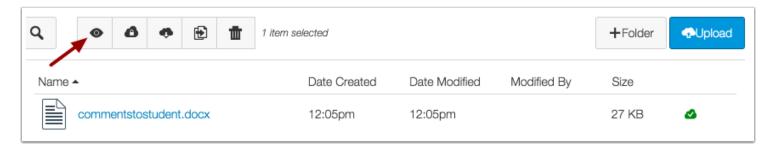
## **Preview File**



Click the name of the file. The preview displays the file and file information details, as well as a link to download the file.

You can scroll through the document, zoom in and out, and view the document in full screen.

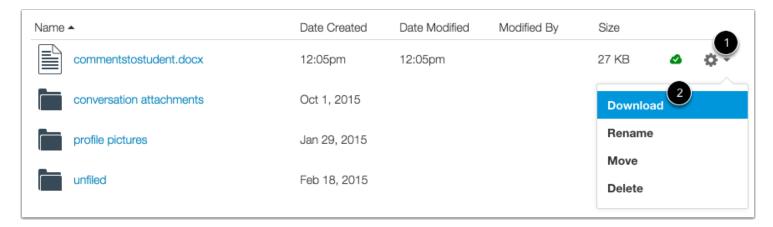
#### **View Button**



You can also preview a file by clicking the **View** button.

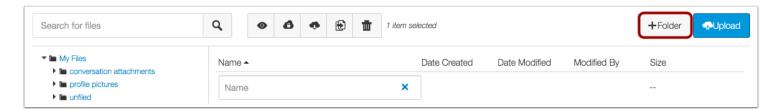


## **Download File**



Click the **Settings** icon [1] and then click the **Download** link [2].

## **Create Folder**



To create an empty folder, click the **Add Folder** button.



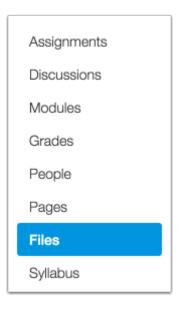
# **Canvas Features**



## How do I view course files as an observer?

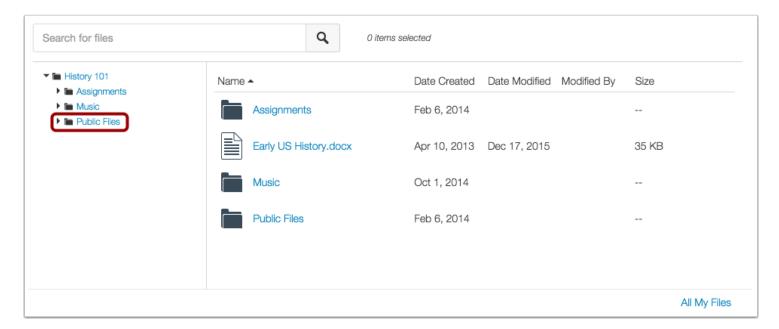
Observers may only be able to access certain course files.

# **Open Course Files**



In Course Navigation, click the Files link.

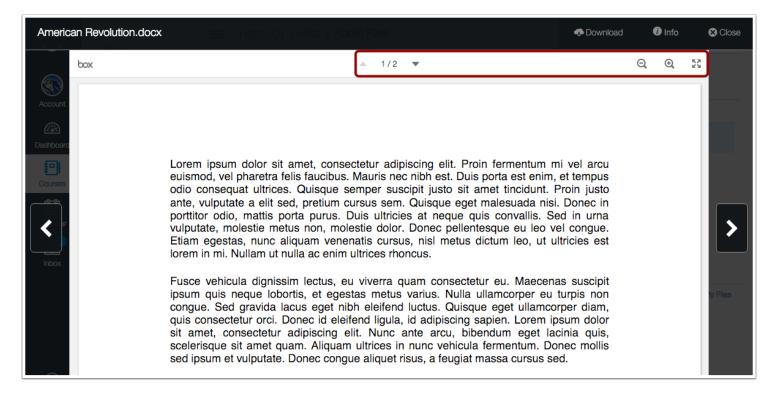
# Open a Folder





To open folder contents in the preview pane on the right-hand side, click an unlocked folder from the left-hand side.

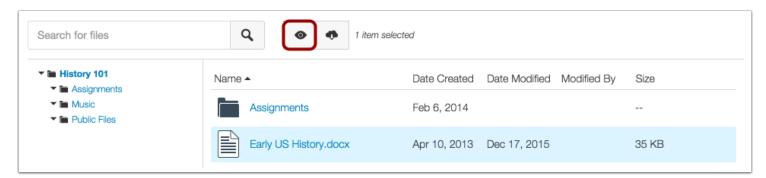
#### **Preview File**



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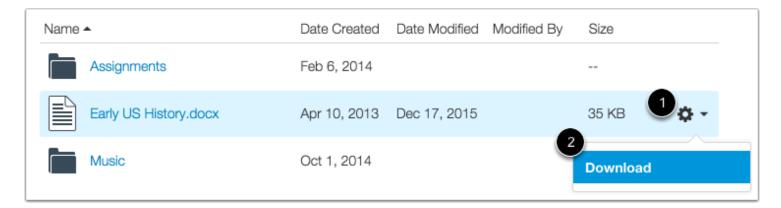
#### **View Button**



You can also preview a file by clicking the **View** button.



## **Download Files**



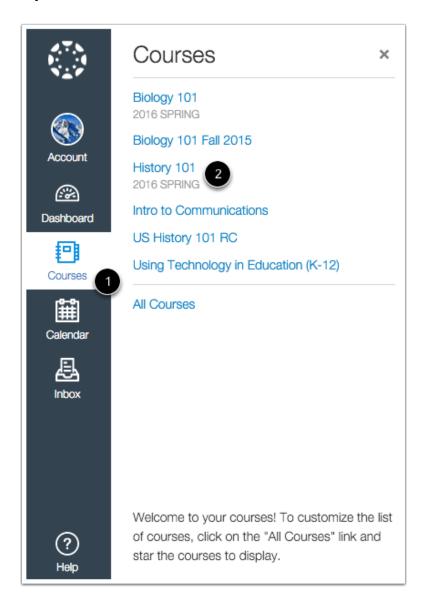
Click the **Settings** icon [1] and then click the **Download** link [2].



# How do I navigate a Canvas course as an observer?

Navigating a Canvas course as an observer is simple.

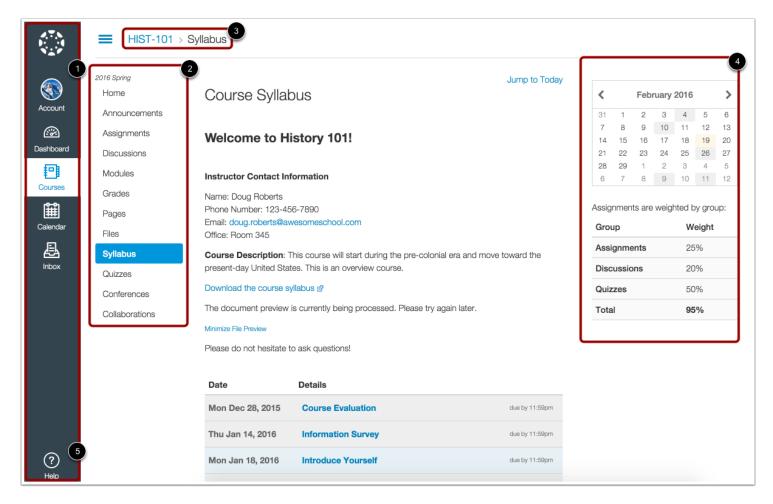
# **Open Course**



In Global Navigation, click the **Courses** link [1], then click the name of the course [2].



#### **View Canvas Interface**



Observers can view Global Navigation, Course Navigation, Breadcrumb Navigation, Sidebar, and Help link.

- The Global Navigation helps you get to where you want to go across all of your Canvas courses [1].
- The Course Navigation helps you get to where you want to go within your canvas course [2].
- The Breadcrumb Navigation shows you where you have navigated to inside of a course and gives you a quick and easy way to move backward [3].
- The Sidebar will be mostly empty for Observers, but will come in handy when its time to edit a course Page [4].
- The Help link is very important. Click the **Help** link when you need assistance from your instructor or the Canvas Support Team [5].

The Course Navigation links on the left side of your screen help you get to where you want to go inside of Canvas. As an Observer, you will see up to 11 links. They are:

- Announcements
- Assignments
- Discussions
- Pages





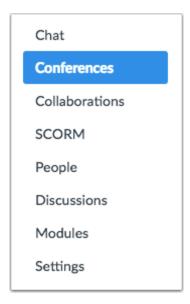
- Files
- Syllabus
- Outcomes
- Quizzes
- Modules
- Conferences
- Collaborations

If you ever have trouble in Canvas and need to communicate with the Instructor about what you are looking at, use these terms and he or she will understand exactly what you mean.

# How do I join a conference?

You can join a conference that has already been started by the conference host.

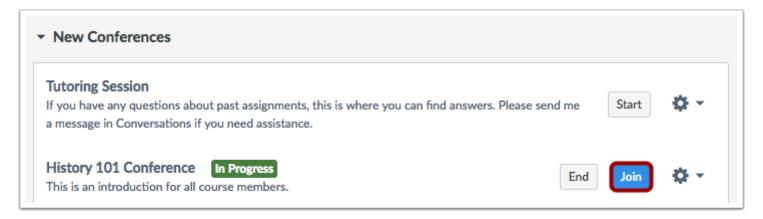
# **Open Conferences**



In Course Navigation, click the **Conferences** link.



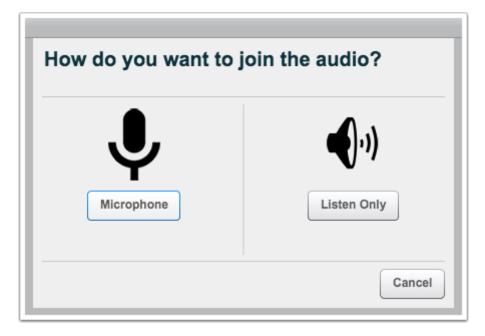
#### Join Conference



Next to the conference you want to join, click the **Join** button.

Note: You cannot join a conference until the conference host has started the conference.

## Join the Audio

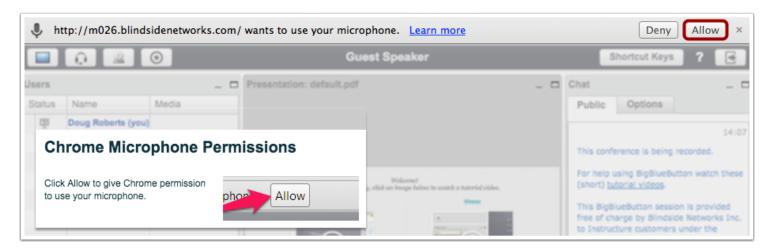


Before joining a conference, you will be asked how you want to join the conference audio: via microphone or listen only. Listen Only allows users to quickly join the conference as a listener only (no microphone check). You will be able to change your audio preference once you've joined the conference.

Learn more about how to set up your audio.



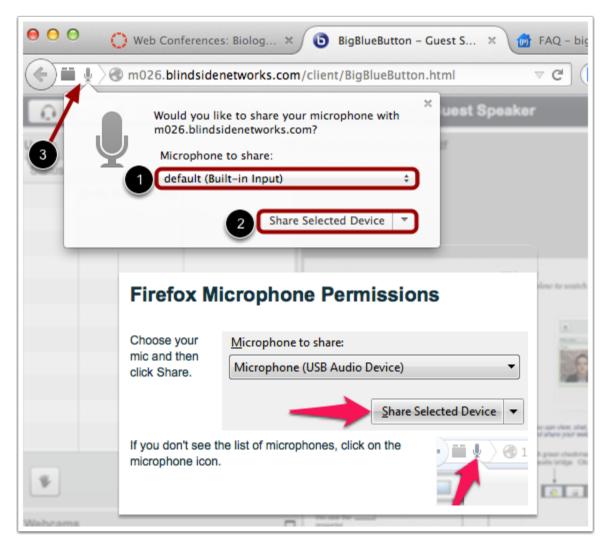
#### **Chrome Microphone Permissions**



If you are using Chrome, you will have to accept a Chrome-specific permission for access to your microphone. This prompt is just below the address bar. Click the **Allow** button.



#### **Firefox Microphone Permissions**

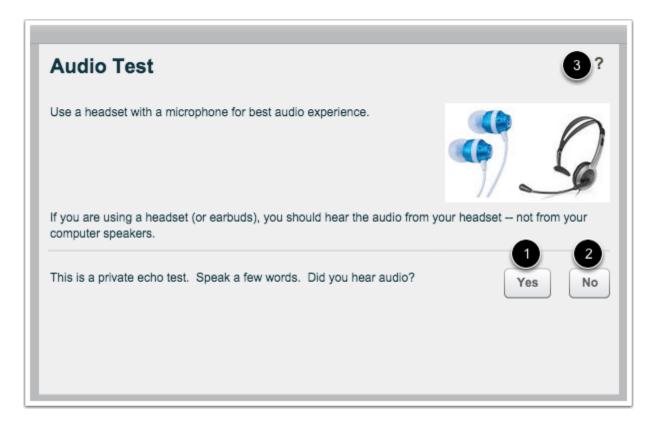


If you are using Firefox, you will have to accept a Firefox-specific permission to access your microphone. Choose your microphone from the **Microphone to share** drop-drown menu [1] and click the **Share Selected Device** button [2].

**Note**: If you don't see the list of microphones, click the microphone icon [3] to the left of the address bar.



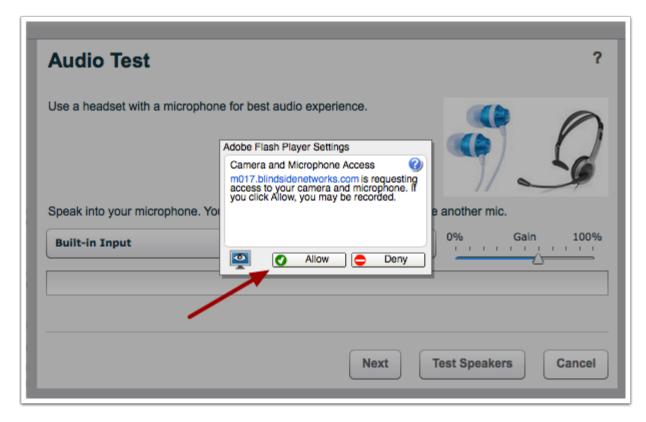
## **Audio Test**



It is recommended that you use a headset with a microphone for best audio experience. To ensure your audio is working correctly, complete the private audio echo test. Speak a few words and if you hear audio, click the **Yes** button [1]. To choose a different microphone and repeat the audio test, click the **No** button [2]. If you need help with your hardware, click the **Question Mark** icon [3].



#### **Accept Adobe Flash Player Settings**

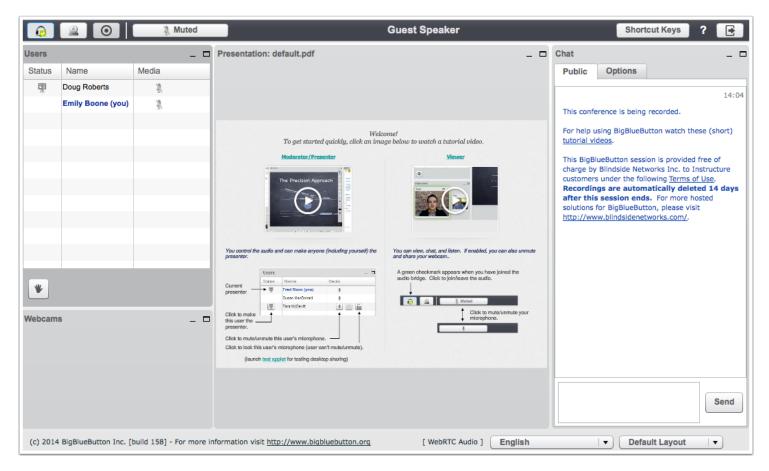


To use Conferences, you must give Adobe Flash Player access to your camera and microphone settings. Click the **Allow** button.

Note: Users of Internet Explorer and Safari will continue to participate with existing Flash-based audio.



## **View Conference**



View the conference.

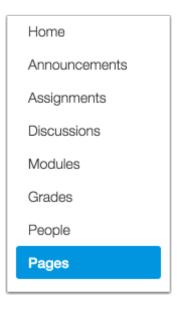
Learn more about how to use the conference interface.



# How do I edit a course page as an observer?

If an instructor allows observers to edit course pages, you can edit a page in a course.

# **Open Pages**



In Course Navigation, click the Pages link.

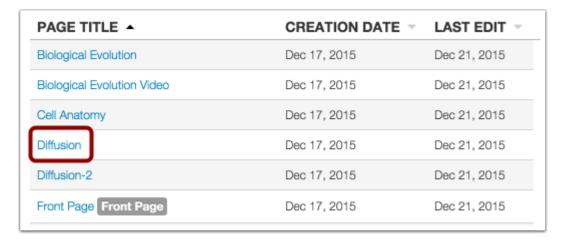
# **View Pages**





Pages is designed to open to the front page for the course, if there is a front page selected. To select a page from the Pages Index, click the **View All Pages** button.

## **Choose Page**



Click the title of the Page you wish to edit.

## **Edit Page**

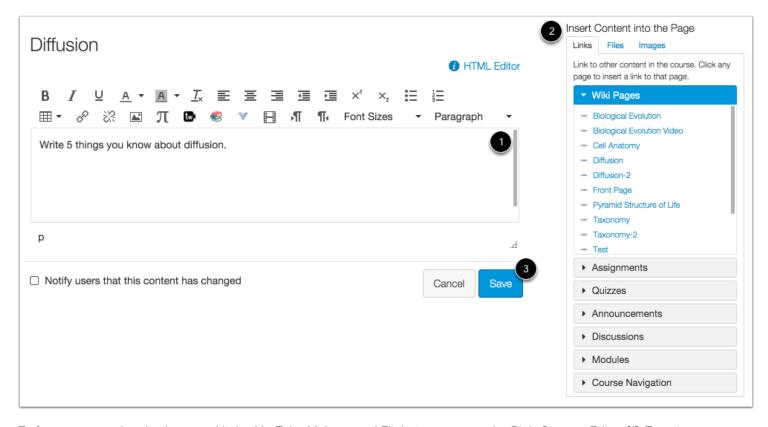


Click the **Edit** button.

**Note**: You will only see the Edit button if you are allowed to edit the page.



## **Edit Content**



To format text and embed external links, YouTube Videos, and Flickr images, use the Rich Content Editor [1]. To gain access to all publicly available Files and Images from course Files, click the Content Selector [2] in the Sidebar. You can also quickly link to existing pages and past Discussions. When you are finished editing the Page, click the **Save** button [3]. Canvas saves a new version of the page each time a user saves, so no changes will ever be lost.

Please see the Canvas Instructor Guide to learn more about Pages and developing content with the Rich Content Editor.



# **Linking Observers to Students**





## How do I link a student to my user account as an observer?

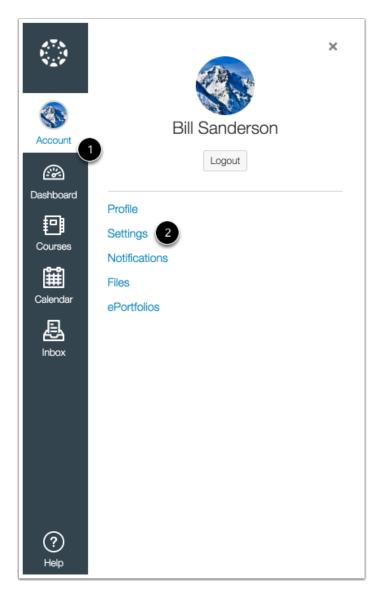
If you <u>signed up for a Canvas account as a parent</u> and linked yourself to a student, you can add additional students to observe within the same institution.

#### Notes:

- You cannot add students whose accounts are not within the same institution (Canvas URL) as yours. To
  observe students in another institution, you must sign up for an account using that institution's Canvas
  URL.
- The Observing page does not display names for student accounts added by the institution via SIS import.
- You can only add students to your account if you signed up for a Canvas account as a parent. If you already have an observer account created by a student's institution, your account is already linked to the student. The option to link to additional students is not available to you.
- Currently observers cannot remove the students they are observing. To remove a student, please contact the student's instructor.
- If you are using the <u>Canvas Parent app</u>, students linked in the browser will also have to be linked in the app. Linked accounts do not currently sync between the web browser and the app.



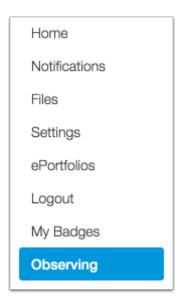
# **Open User Settings**



In Global Navigation, click the **Account** link [1], then click the **Settings** link [2].

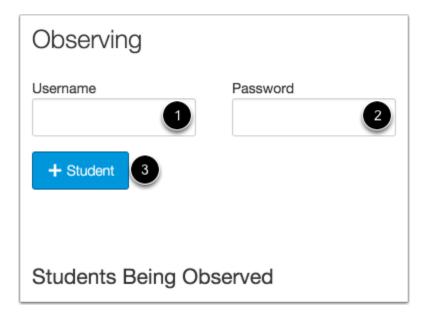


# **Open Observing**



In User Navigation, click the **Observing** link.

## **Add Student**



In the Username [1] and Password [2] fields, enter the student's username and password.

Click the Add Student button [3].



# **View Student**

Observing	
Username	Password
+ Student	
Students Being Observed	
Nora Sanderson	
Canvas Student	

View the new student you are observing.