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Setting up LTI[®] for Blackboard[™]





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Electric Paper Evaluationssysteme GmbH

Konrad-Zuse-Allee 13 21337 Lüneburg Germany

Phone: +49 4131 7360 0 Telefax: +49 4131 7360 60 Email: <u>info@evasys.de</u>

Managing Director: Silvio Ewert, Laurent Lazar

USt-IdNr.: DE 179 384 158

Handelsregister: HRB-Nr. 1604, Lüneburg

Edited by Dr. Iris Hille, Darin Gürlük, Nils Pohlmeier, Bernd Röver

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1. LTI® - Interface

The EvaSys LTI® integration functionality allows you to use the built-in LTI framework of your learning management system (LMS) to display EvaSys survey information within the learner and instructor views. The EvaSys LTI integration works with all systems supporting the IMS LTI® standard, such as Blackboard, Moodle, BrightSpace® by D2L or Canvas.

The LTI integration leverages LTI Roles to populate information in our two dashboards.

Learner Dashboard

Students now have a dashboard providing survey information in a rich and customizable content. Visual indicators have been incorporated to encourage students to take their surveys.



Figure 1: Learner Dashboard

Instructor Dashboard

Instructors will be provided their survey's response rates throughout the evaluation period to help them encourage their students to participate.



Figure 2: Instructor Dashboard

The tool can be configured to provide access or not to course evaluation results such as PDF or CSV and can be displayed directly into your LMS portal.

Use of the LTI interface is subject to a license. Different license models are available depending on the desired features of the LTI interface. Your EvaSys customer service will be happy to advise you on a licensing of the interface that fits your needs.





The minimum version of EvaSys required is version 7.1 (2150), but we recommend using version 8.0 (2200) for the full set of features. Please ensure that the current version of your LMS supports IMS LTI[®].

To ensure a smooth implementation, you must have a tested network route on port 443 between both servers. Load Balancer, Firewall, proxy servers must be configured adequately.

1.1. Activating LTI®

If licensed, the LTI interface can be activated directly in the EvaSys administrator interface.

To do this, go to "System Settings / Interfaces & Plug-ins" and open the tab "LTI® Interface".

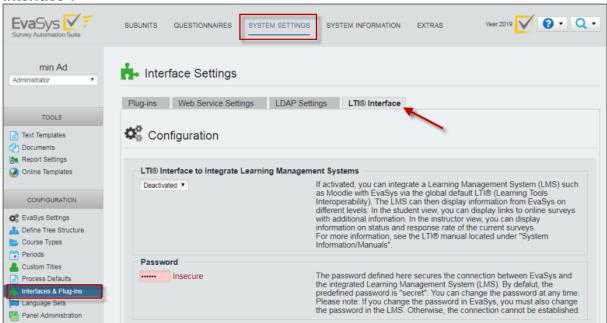


Figure 3: LTI Interface

Here you can activate the option "LTI® Interface to integrate Learning Management Systems".

If you have done so, you can define a password which secures the connection between the EvaSys server and the integrated LMS. The default password is "secret". Please note: If you change the password here, it must be changed in the LMS configuration as well too to work properly.

At the bottom of the page you can upload your own customized LTI[®] templates. If you do not upload customized templates, the default template will be used. For further information, see below Configuring LTI®

Under the activation settings the configuration of the LTI interface is shown. Here you can control displays and functions for the instructor and learner view in the LMS. In detail:

Instructor View: Alternative Identifier

Defines the parameter from the LTI request that should be used as identifier instead of the email address (default). Use this parameter when the email address in the





LMS differs from the email address of the instructor in EvaSys.

Please note:

This parameter compares the identifier to the external ID of the instructor. Therefore, you must activate the usage of external IDs in EvaSys, and define them in user settings.

Instructor View: Allow raw data export

Defines if you can open raw data for closed surveys via the survey list in the instructor view.

Please note:

If you activate the export function, this may increase the workload on the EvaSys server and thereby affect performance.

Instructor View: Allow PDF report download

Specifies if you can download the PDF report into the examiner view via the exam list.

Please note:

If you activate the report download, this may increase the workload on the EvaSys server and thereby affect performance.

Instructor View: Delayed display of survey results

Activates the result access via LTI in scheduled tasks to consider the delayed report dispatch. If activated, instructors can only download reports after the delay time has ended.

Instructor View: Show surveys from earlier periods

Specifies if only current surveys are displayed (default value 0), or if surveys of ealier periods are displayed as well. The selected number represents the number of earlier periods.

Instructor View: Access survey data from earlier periods

Specifies if survey information is displayed from earlier periods.

When set to the default value 0, only data of the current period is displayed.

Instructor View: Survey types in the survey list

Defines the types of surveys that are displayed in the survey list in the instructor view. The following survey types are available: Online Survey, Hybrid Survey, Paper Survey.

Instructor View: Show plug-in instead of survey list

Defines whether the LTI should display a plug-in instead of the standard survey list displayed in the LMS. The adjacent input field contains the corresponding plug-in ID. Below, you can see a sample of the plug-in "Bring your own device" displayed in Moodle:







Figure 4: Plug-in in Moodle

Apart from the plug-ins provided by your vendor you can also use your own plug-ins to be displayed in the LMS. The plug-in which you would like to show first has to be uploaded via the EvaSys menu "Interfaces & Plug-ins". After this, it can be called via LTI with the help of this setting.

Please note:

The plug-in must be approved for the user type instructor. The plug-in replaces the survey list in the LMS. It is not possible to simultaneously display survey list and plug-in content.

Instructor & Learner View: Order surveys according to survey close date

Defines, if surveys in the learner and instructor view are ordered according to the survey close date. When deactivated, surveys are ordered alphabetically.

Learner View: Alternative LMS identifier

Defines the parameter to use as identifier instead of the email address from the LTI request. Use this parameter in case the email address in the LMS differs from the email address of the participant in EvaSys. If this field remains empty, the email address will be used by default.

Learner View: Use custom field as identifier

Defines the custom field of the participant in EvaSys to use as identifier instead of the email address (e.g. if you use the LMS username as identifier, it has to be imported as a custom field of the participant).

Learner View: Survey types in the survey list

Defines the types of surveys that are displayed in the survey list in the learner view. The following survey types are available: Online Surveys, Hybrid Surveys.

Learner View: Show instructor images in the survey list

Defines whether the instructor's profile image should be displayed in the survey list using the placeholders INSTRUCTOR_IMAGE or SECONDARY_INSTRUCTOR_IMAGES.





Please note:

A profile image must be uploaded in the corresponding user settings of the instructors in EvaSys.

Learner View: Show completed surveys

Specifies if completed surveys are displayed in the survey list next to the open surveys in the learner view. By default, only open surveys are displayed.





1.2. Default LTI Templates

The layout of the EvaSys survey block for learners and instructors is defined by templates. There are four default templates:

- Instructor_template.html
 - Defines the layout and content of the header and footer in the instructor view
- Instructor_survey_block_template.html
 Defines the content of the survey block within the instructor view (content repeated per survey)
- Learner_survey_block_template.html
 Defines the layout and content of the header and footer in the learner view
- Learner template.html

Defines the content of the survey block within the learner view (content repeated per survey)

The information displayed in the instructor and learner view is defined by the help of placeholders.

In the instructor view, by default the following information is displayed:

- Course name
- Course code
- Response Rate
- Enrollment number
- Open until...
- Status



Figure 5: Instructor View

In the learner view, by default the following information is displayed:

- Course name
- Course code
- Instructor name
- Open until...
- Take Survey Button



Figure 6: Learner View

In both dashboards, the surveys of the current survey period are displayed by default. If there is no survey available, a corresponding message will be viewed by the learner.





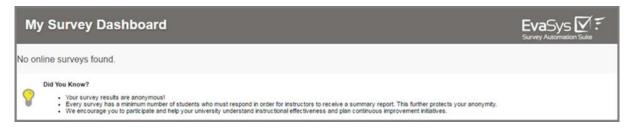


Figure 7: No surveys found

1.3. Customizing your LTI Connector

If you wish to adapt the content and layout displayed in your LMS, you can customize the LTI templates as well as the stylesheets. To do so, please download the original default templates in the menu "System Information/Sample Files":

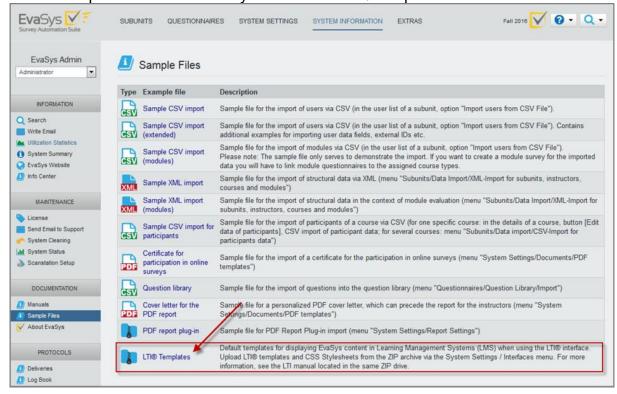


Figure 8: Download the default templates

The zip archive contains the four templates described in Default LTI Templates as well as the css stylesheets for the learner and instructor view (instructor.css and learner.css). In addition, it contains the LTI manual.





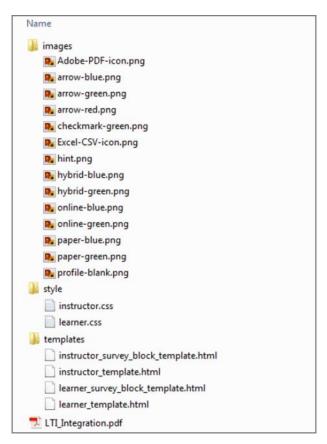


Figure 9: Content of the zip archive





1.4. Customize Templates

You can adapt the html templates to define which kind of survey data shall be displayed in the LMS and/or define logical conditions within the templates (using Java Script). The following list shows all placeholders which can be used in the templates:

Instructor & Learner Template	Description			
[SURVEY_ID]	Internal EvaSys survey ID (e.g. 15306)			
[SURVEY_NAME]	Name of the survey (e.g. Web Design)			
[COURSE_CODE]	Course code (e.g. Co-002-A)			
[INSTRUCTOR_NAME]	Name of the instructor (title, first name, surname) (e.g. Prof. Donna Harwood)			
[INSTRUCTOR_IMAGE]	Path to the image of the main instructor			
[SURVEY_STATUS]	Current status (e.g. In Progress, Data available)			
[SURVEY_TYPE_IMAGE]	Link to graphic indicating the survey type (online.png, hybrid.png or paper.png); graphics are stored in subfolder "customer\LTI\images"			
[SURVEY_TYPE_NAME]	Survey Type ("Online Survey", "Hybrid Survey", "Paper Survey")			
[SURVEY_IS_ANONYMOUS]	Logical condition, value true / false			
[SURVEY_IS_OPEN]	Logical condition, value true/ false			
[SURVEY_PERIOD]	Survey period (e.g. 2016-1)			
[SURVEY_CREATION_DATE]	Date of survey creation (e.g. 02/25/2016 at 09:18:04 am)			
[SURVEY_SCHEDULED_START_DAT E]	Start date defined in Scheduled Tasks (Task "PSWD to respondents") (e.g. 02/29/2016 at 09:30:00 am)			
[SURVEY_SCHEDULED_END_DATE]	End date defined in Scheduled Tasks (Task "Finish survey") (e.g. 03/14/2016 at 06:00:00 pm)			





[SURVEY_LAST_COLLECTION]	Date of last data collection (e.g. 03/07/2016 at 09:18:04 am)
[SURVEY_ENROLLMENT]	Number of course participants (e.g. 20)
[SURVEY_RESPONSES]	Number of responses (e.g. 18)
[SURVEY_RESPONSE_RATE]	Response Rate (e.g. 90) (consider method to calculate response rate in EvaSys, see information below)
[SECONDARY_INSTRUCTOR_ NAMES]	Names of all secondary instructors divided by " " (Pipe)
[SECONDARY_INSTRUCTOR_IMAGE S]	List of all paths to the images of the secondary instructors divided by " " (Pipe)
[LOAD_INSTRUCTOR_IMAGE]	Boolean ("True"/"False"), linked to the request parameter "learner_load_instructor_images"

Learner Template Only	Description
[DIRECT_ONLINE_LINK]	Direct link to online survey including PSWD
[PARTICIPATED]	Logical condition, value true/ false
[LEARNER_RESULT_ACCESS]	Boolean ("True"/"False"), linked to the option "Allow result access" in the questionnaire details
[LEARNER_RESULT_ACCESS_LINK]	Direct link to the HTML report view. Result access is limited to surveys in current period(s).

Instructor Template Only	Description
[PDF_REPORT_PATH]	URL to PDF report
[CSV_EXPORT_PATH]	URL to CSV export

Table 1: Template Placeholders

After you have changed the HTML templates, please restart the "memcached service" on the EvaSys server to ensure that the changes are taken over correctly.





In the example below, you can see an adapted HTML template. In this case, result access for students has been activated by means of the parameters [LEARNER_RESULT_ACCESS] and [LEARNER_RESULT_ACCESS_LINK]:

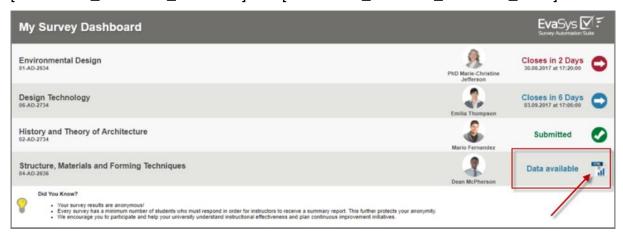


Figure 10: Learner View: Access HTML report via LTI

The results are displayed in the student view of your LMS as soon as the survey in EvaSys has been closed. Only closed surveys for the current evaluation period will be displayed.

Please note: To use this feature, as a prerequisite, you have to grant result access for the questionnaire used for your EvaSys survey.





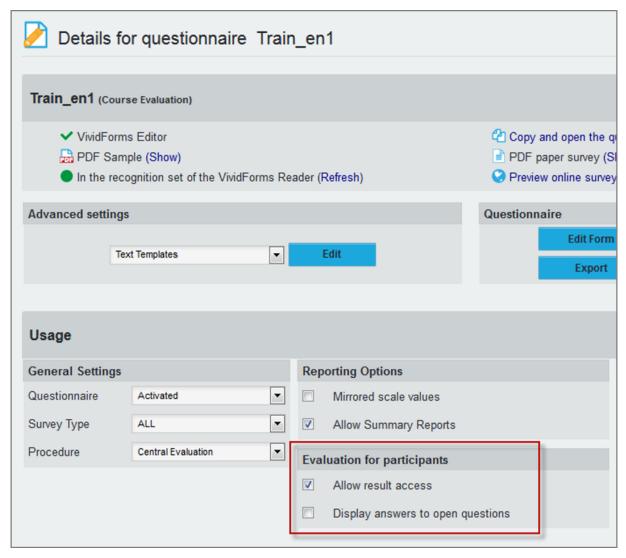


Figure 11: Allow result access for a questionnaire

1.5. Customize CSS Style Sheet

Additionally, you can adapt the CSS style sheets to change settings for fonts, colors, margins etc.

1.6. Upload templates

After you have done your changes to the html and css files, you can upload the templates in the menu "System Settings / Interfaces & Plug-ins", tab "LTI® Interface". Before uploading the files, please add them to a zip archive.

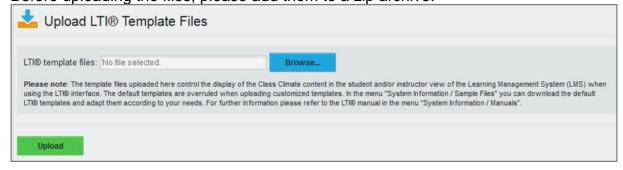






Figure 12: Upload template files

Please note: The default templates are overruled when uploading customized templates. In the menu "System Information / Sample Files" you can download the original default LTI® templates again at any time.

1.7. Customize Images

If you wish to customize the images used for the display of survey types (placeholder [SURVEY_TYPE_IMAGE]), you have to change the image files directly on the EvaSys server.

The images are stored in the folder

*:\Inetpub\wwwroot\evasys\customer\LTI\images

You can substitute the images by your own, keeping the correct file format and file name (online.png, paper.png, hybrid.png).

1.8. Special LMS Parameters

You can add special parameters directly in your LMS. These parameters are divided into two types:

Parameters for Students/Learners

order_by_survey_close_date
learner_survey_types
learner_show_completed_surveys
learner_load_instructor_images
learner_lms_identifier
learner_provider_identifier

Parameters for Instructors/Teachers

order_by_survey_close_date
instructor_survey_types
instructor_show_past_surveys_for_n_previous_periods
instructor_survey_data_access_for_n_previous_periods
instructor_show_report
instructor_show_export
instructor_plugin_response
instructor_lms_identifier

Special parameters for Students/Learners

order_by_survey_close_date = 0 oder 1





Defines whether the surveys are sorted alphabetically (0) or by end date in student and faculty view

learner_survey_types = separated by pipe characters "o", "h" (e.g. "o|h" for online and hybrid surveys)

Defines which types of surveys are displayed: "o" stands for "online surveys", "h" stands for hybrid surveys.

Default value: o|h

learner_show_completed_surveys = 0 oder 1

Defines whether only open surveys are displayed for the learner/student (0) or also completed ones (1)

Default value: 0 (open surveys sonly)

learner_load_instructor_images = 0 oder 1

Defines the possibility to display the instructor/teacher image from EvaSys in the placeholder INSTRUCTOR_IMAGE, SECONDARY_INSTRUCTOR_IMAGES (1) sets the placeholder LOAD INSTRUCTOR IMAGE

Default value: (0)

learner_lms_identifier = Beliebiger Parameter aus der LTI Abfrage (z.B. "ext user username")

Defines which parameter is to be used as user ID instead of the e-mail address from the LTI query: Use parameters if the participant's e-mail address in EvaSys is different from the e-mail address in the LMS.

Default value= " " (The e-mail address is taken as ID)

learner provider identifier = "custom1", "custom2", "custom3"

Defines which participant additional field in EvaSys should be used for the participant ID instead of the e-mail address (for example, if the LMS user name should be used as ID instead of the e-mail, this value must also be imported via an additional field)

Default value= " " (The e-mail address is taken as ID)

Special parameters für den Instructor/Teacher

instructor_survey_types = "o", "h", "p" separated by pipe characters (e.g. "o|h" for online and hybrid surveys)

Defines which types of surveys are displayed: "o" stands for "online surveys", "h" stands for hybrid surveys, "p" for paper-based surveys

Default value: olhlp

instructor_show_report = 0 or 1

Defines whether PDF reports from the survey list can be opened in the lecturer/teacher view.

Default value = 0 (no report access)





Attention: If this function is activated, this can possibly increase the load of the EvaSys server and influence the performance.

instructor_show_export= 0 or 1

Defines whether raw data for closed surveys can be opened from the survey list in the lecturer/teacher view.

Default value = 0 (no export access)

Attention: If this function is activated, this can possibly increase the load of the EvaSys server and influence the performance.

instructor_show_past_surveys_for_n_previous_periods = 0 to X

Defines whether only surveys of the current period are displayed (0), or whether previous periods are also displayed.

Default value = 0 (only current period is displayed) "X" specifies the number of previous periods (X is a positive integer)

instructor_survey_data_access_for_n_previous_periods = 0 bis X

Defines whether information about the surveys is only displayed for the current period (0), or whether previous periods are also displayed.

Default value = 0 (only current period is displayed) "X" indicates the number of previous periods (X is a positive integer)

order_by_survey_close_date = 0 or 1

Defines whether the surveys are sorted alphabetically (0) or by completion time (1) in participant and instructor view.

instructor plugin response = [Plug-in Name) (z.B. BringYourOwnDevice)

Defines whether the survey list in the instructor view should be replaced by a plug-in. All plug-ins that are available for the Lecturer/Teacher User Role in EvaSys can be displayed in the LMS. The lecturer will be logged in automatically and the lecturer's default interface will be replaced by the one of the stored plug-in. In the example below you can see the plug-in "Bring your own device" displayed in Moodle:

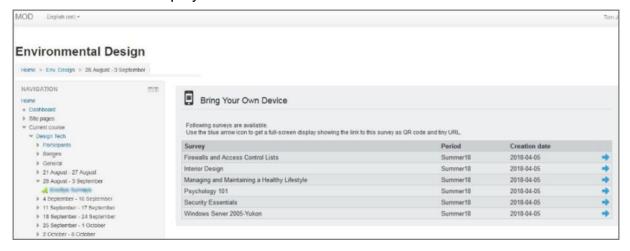


Figure 13: Plug-in in Moodle





1.9. Settings within EvaSys

The unique identifier and connector for instructors and learners is the email-address stored in EvaSys and in the LMS tool you are using.

Learner Settings

In case of learners, the system checks for each learner stored in the LMS database which of the open online surveys running on the EvaSys server contains the same learner's email address. If there are open online surveys for an email address, the surveys will be displayed in the learners LMS account.

When you set up or import courses in EvaSys, it is therefore necessary to also import the participants email addresses for each course.

Participants can be imported by utilizing a simple CSV file format which includes a course ID followed by an e-mail address for each line. Example:

MA05Wiw2; person01 @localserver.com MA05Wiw2; person02 @localserver.com MA05Wiw2; person03 @localserver.com MA05Con; person01 @localserver.com MA05Con; person03 @localserver.com MA05Con; person04 @localserver.com MA05Con; person05 @localserver.com

This example shows two courses with three and four participants each. Some of the participants are attending both courses, some only one of both.

Before importing the participant data into EvaSys you will need to setup the subunits, questionnaires, instructors and courses. It is essential that the course IDs set for the courses are identical to those being used in the participant import file since they serve as a reference.

It is possible to use a different indentifier than the e-mail address. In this case, it is necessary to import the identifier by using the additional fields for participant information. When importing the participant data for an anonymous survey, the course ID and the email address, as well as the LMS user name, are uploaded. An example CSV import file could look like this:

Course ID	Email address				Custom field 1	Custom field 2	Custom field 3	
Α	В	С	D	Е	F	G	н	I
VWL006	t1@example.com					LMS User Name 1		
VWL006	t2@example.com					LMS User Name 2		
VWL006	t3@example.com					LMS User Name 3		
VWL006	t4@example.com					LMS User Name 4		
VWL006	t5@example.com					LMS User Name 5		

Figure 14: Import file with LTI name in the custom field

Please note that you have to adhere to the correct format of the import file. In LTI you have to define which of the EvaSys user data fields has to be matched with the LMS user name.

Please refer to **Fehler! Verweisquelle konnte nicht gefunden werden.** for more i nformation about the participants' data import process.





Electric Paper also offers professional services to help convert your data into the XML format needed by EvaSys. It is also possible to create the courses manually within the EvaSys interface or to create simpler, Excel-based CSV import files for each subunit. Please refer to **Fehler! Verweisquelle konnte nicht gefunden w erden.** for more information about the CSV import process.

Instructor Settings

The instructor's email address has to be defined in the corresponding EvaSys user profile as well as in his LMS user profile. The system checks for each instructor stored in the LMS database which surveys are available for the instructor's email address and displays the surveys in the instructor's LMS account.

It is possible to use an external ID instead of the e-mail address. In this case it is necessary to set an external ID for the instructors. The LMS name used in the LMS must match with the information stored in the "External ID" field of the instructor.

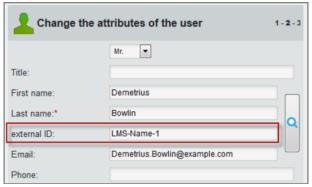


Figure 15: Instructor's external ID

Of course, you can also import this information. When doing a CSV import, you have to use a column with the column label USER_EXTERNAL_ID. For further information on external IDs please refer to the EvaSys User Guide.

Please note: If an instructor is stored in more than one EvaSys subunit with the same email address, then the survey data can only be displayed in the instructor's LMS account if you are using External IDs to connect the instructor accounts in EvaSys. If you do not use External IDs, then the data will not be displayed!

The same is true for courses or modules with secondary instructors: The data of these surveys will not be displayed in the instructor's LMS account if there is no External ID defined for the instructor.

The use of External IDs is not activated by default. To activate the function, go to "System Settings / EvaSys Settings / Functions / General" and activate the option "Display external ID".





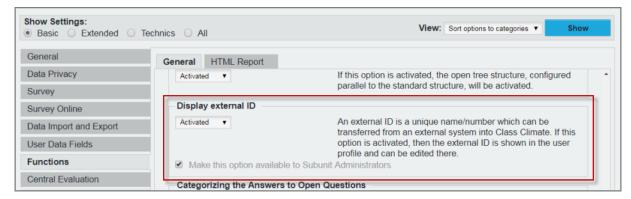


Figure 16: Activate External ID

When activated, for each instructor an External ID can be defined or imported. For further information on the use of External IDs please refer to the EvaSys User Guide.

In order to display survey data of courses an instructor is defined for as secondary instructor (e.g. module courses), the corresponding setting has to be activated in the EvaSys settings as well. To do this, go to "System Settings / EvaSys Settings / Data Privacy" and activate the option "View reports as secondary instructor".

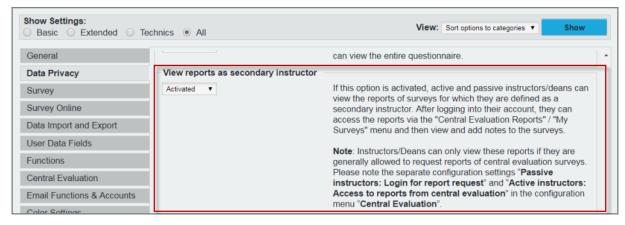


Figure 17: View reports as secondary instructor

Survey Settings

In the learner's view, by default only those online surveys are displayed which are currently open. Surveys which have been prepared but are still closed, or surveys which have been finished, will not be displayed.

The easiest way to control the display of online surveys in the learner's view is via the EvaSys "Scheduled Tasks". If you create your online surveys in EvaSys, you can activate "Time Control" and define a date when to "Send PSWDs to respondents" and when to "Finish Survey". Within the time frame of these two scheduled tasks the survey will be displayed in the LMS student's view.





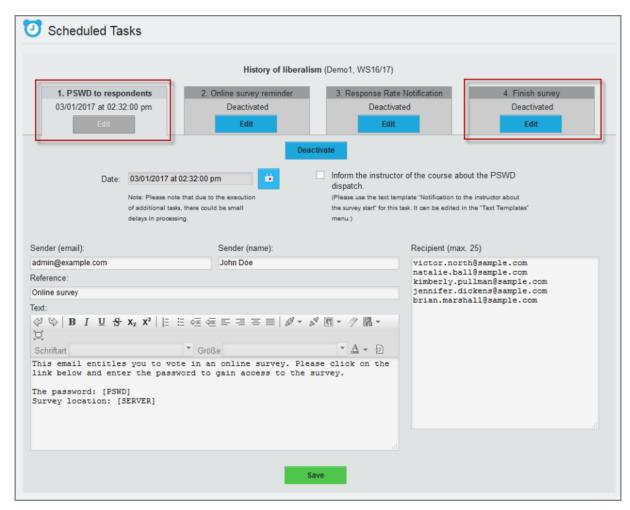


Figure 18: Define Scheduled Tasks

If you are using "Scheduled Tasks", you should activate the option "Prevent premature display of surveys in LMS" in "System Settings / EvaSys Settings / Survey Online". This way, the links to online surveys will not be displayed directly after the survey has been generated, but only after the first Scheduled Task date.

If you do not activate this option, the survey will be displayed directly after survey generation.

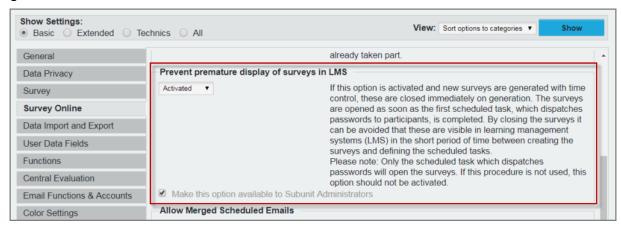


Figure 19: Prevent premature display of surveys in LMS





If desired, you can inform the instructor about the survey start when sending the PSWDs by activating the corresponding checkbox in the "Scheduled Tasks" (see above **Define Scheduled Tasks**). This way, the instructor can be notified that there will be a new survey displayed in the instructor view. There is a text template available in the menu "System Settings / Text Templates" so that the email text can be adapted beforehand.

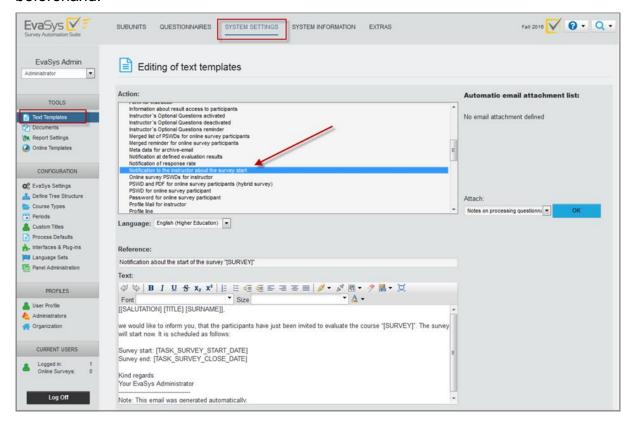


Figure 20: Informing the instructor about the survey start

For further information on Scheduled Tasks please refer to the EvaSys User Guide.

If you do not wish to work with Scheduled Tasks, you can also manually control the display of surveys in the LMS by manually locking and unlocking the online surveys.

You can lock or unlock each survey individually in the survey list or survey details by clicking on the lock icon, or you can lock and unlock all surveys of the current period for a whole subunit by clicking on the lock icon below the user list. This helps you control the visibility of available online surveys in the LMS.





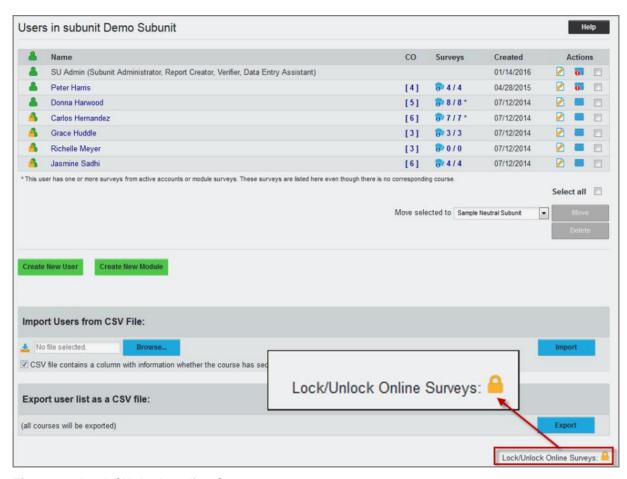


Figure 21: Lock / Unlock Online Surveys

In the default instructor's view, all surveys of the current evaluation period are displayed, independent of the survey status.





Configuring LTI for Learning Management Systems (LMS)

The following chapters will explain how to set up the LTI connection to Class Climate in the different LMS tools. Please note that the images in the following sections may slightly differ from the UI of your LMS, depending on the version you are using.

1.11. Blackboard

To connect EvaSys and Blackboard via LTI, a new LTI tool has to be added and configured in Blackboard. In the following chapters, the relevant steps are described.

Adding a new LTI Tool

Log in to Blackboard as administrator.

Select "System Admin" from the top navigation bar, then select Building Blocks.

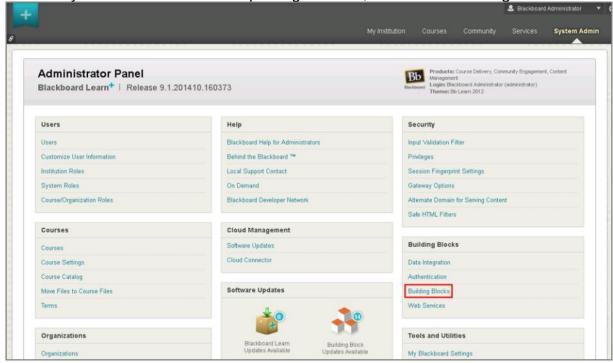


Figure 22: Building Blocks





Next, select LTI Tool Providers.

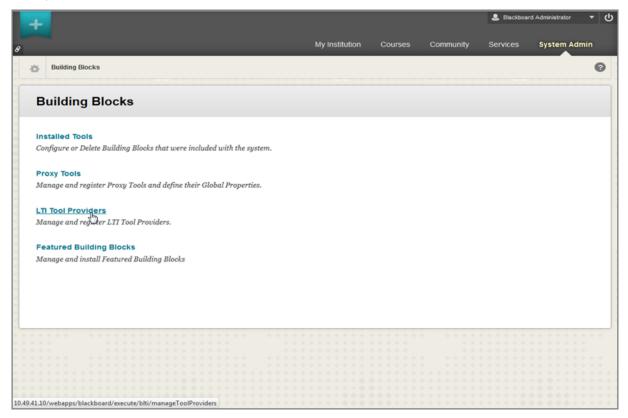


Figure 23: LTI Tool Providers





Use the Register Provider Domain option to create additional LTI Tool Providers.

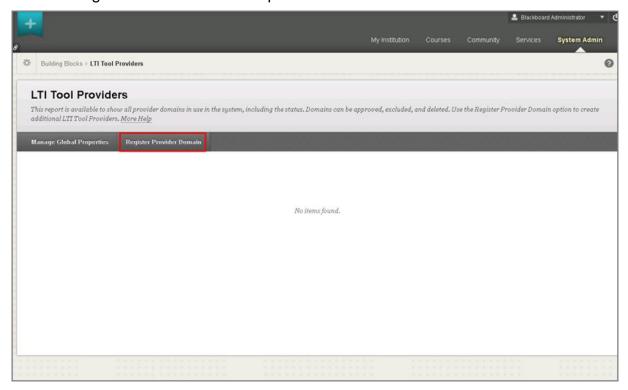


Figure 24: Register Provider Domain

Editing LTI Tool

This section contains the mandatory properties of the tool:

- Provider Domain
- Default Configuration
- Tool Provider Key
- Tool Provider Secret
- Send User Date
- User Fields to Send

The Provider Domain should be the IP or hostname of your EvaSys system.

- For "Default Configuration" choose "Set globally".
- The "Tool Provider Key" is "12345".
- The "Tool Provider Secret" is defined in the EvaSys menu "Interfaces and Plug-ins / LTI® Interface" (see above Activating LTI).
- In the "Tool Provider Custom Parameters" box you may add one or more of the parameters described in the section LMS Custom Parameters.





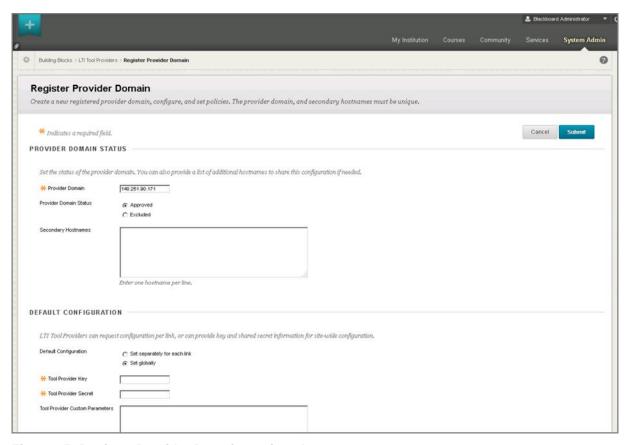


Figure 25: Register Provider Domain settings I

In the "Institution Policies" section, the option "Send User Data" should be set to "Send user data only over SSL". As "User Fields to send" select "Email Address" and "Role in Course".

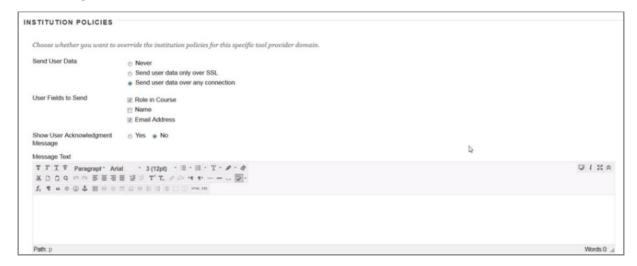


Figure 26: Register Provider Domain settings II

After setting all these details, press "Submit" to create the LTI Tool.

Managing Placement

In order to reach the LTI Tool logged in as a student, a placement has to be created, which includes all the basic settings (displayed name, tool provider URL etc.). Press "Manage Placement" and then "Create Placement" to set the placement's





details.

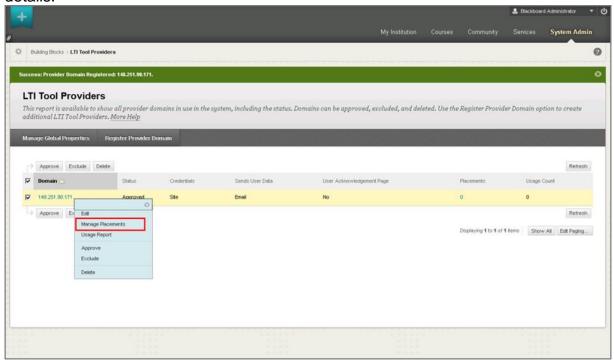


Figure 27: Manage Placements

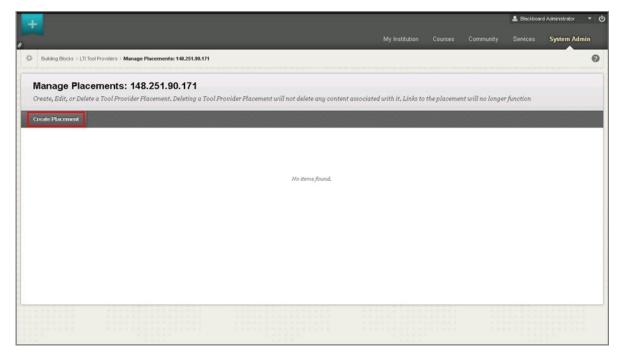


Figure 28: Create Placement I

First, define the name of the LTI Tool, that the students would see (Label), then the unique name of the placement (Handle). The type should be set to Student Tool. Enter the URL of your EvaSys system.

https://[HOSTNAME]/evasys/customer/lti/lti_provider.php

Note that if you are using a SAAS system the term 'evasys' will have to be customized to your specific URL.





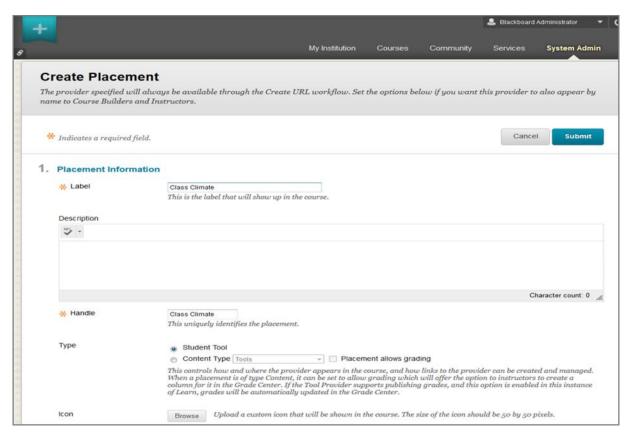


Figure 29: Create Placement II

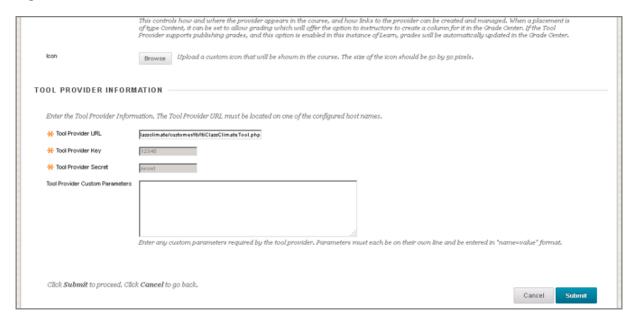


Figure 30: Create Placement III

Once the settings are done, press "Submit".

Blackboard Sample Screenshots

EvaSys LTI Integration in Blackboard:





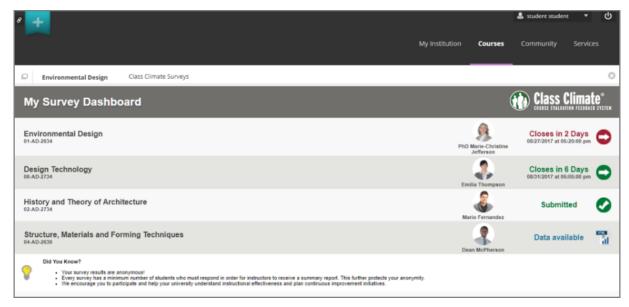


Figure 31: Blackboard Student View



Figure 32: Blackboard Lecturer View