

# eFundi Tutorial: Site Info



Site Info is the starting point for all changes you wish to make and use in your entire site. Every site created on eFundi will have a Site Info option in the main menu on the left of the screen.

The following topics will be addressed in this tutorial:

[Add/remove site participants](#)

[Add/remove site tools](#)

[Change tool order, names & visibility](#)

[eFundi Groups](#)

[How to manage/change access to a site](#)

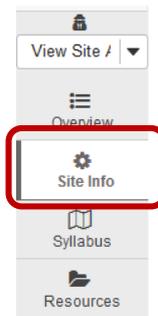
[How do I add a class member list\(s\)?](#)

[If you are the courselinked instructor / lecturer](#)

[If you are not the courseliked instructor / lecturer](#)

[Other functions in Site Info](#)

[Need help?](#)



## Add and remove participants

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If you created your site correctly by selecting the module in **eFundi Course link**, all students registered for your module will automatically be added to your module site.

It might happen that a student registered late, or you want to give access to your SI leader, teaching assistant, colleague or it might be necessary to give an external moderator access to a site.

Please take note of the steps below for adding these additional participants to your site.

[Adding a NWU student/staff member](#)

[Adding a non-NWU user](#)

- [Steps for outside users to join eFundi](#)

[Removing participants](#)

## Adding a NWU student/staff member

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To add a NWU user to your site, you will need their university number.

Go to your module site, and select **Site Info**. Click the **Add Participants** tab at the top of the screen.

The screenshot shows the eFundi interface for a site named 'TGNT 1 V Year 2011'. The 'SITE INFO' section is active, and the 'Add Participants' tab is highlighted with a red box. The page displays the following information:

- Term:** Year 2011
- Roster(s) with site access:** TGNT\_1\_V\_Year 2011 (Requested)
- Site URL:** http://v-sakai-dev-lnx2.nwu.ac.za:8080/portal/site/2647a554-1f5d-4cbd-88c6-6b0fcb11230

Insert the university number(s) of the users you would like to add in the box **Official Email Address or Username**. If you want to add more than one user, remember to insert each number on a separate line (no punctuation). When have entered the university number, click the **continue** button.

The screenshot shows the 'Add Participants' form. The 'Official Email Address or Username' field is highlighted with a red box, and an arrow points to it from a label 'University number'. The 'Continue' button is also highlighted with a red box, and an arrow points to it from a label 'Click to continue'.

On the next screen you will indicate the type of rights you want to give the person. Is this a student or another lecturer?

The screenshot shows the 'Choose a Role for Participants' screen. It displays a table of roles and their permissions:

Role	Permissions
<input type="radio"/> Additional instructor	Can read, add, and revise most content in their sections.
<input type="radio"/> Instructor	Can read, revise, delete and add both content and participants to a site.
<input type="radio"/> Student	Can read content, and add content to a site where appropriate.
<input type="radio"/> Teaching Assistant	Can read, add, and revise most content in their sections.

Below the table, the 'Participants' field contains '2' and is highlighted with a red box, with an arrow pointing to it from a label 'Click to continue'. The 'Continue' button is also highlighted.

You are given the option to send an e-mail to the person to inform them that they now have access to the site. Choose the relevant radio-button and then **continue**.

An email can be automatically sent to the added users notifying them of the site's availability.

- Send Now - send an email now to users notifying them that the site is available
- Don't Send - do not send an email notifying new participants about the site's availability



A page will appear with all the details. Check that it is the correct person and that you have allocated the correct role, then click **Finish**.

### Confirming Add Participant(s) to ABCD 111 V 2017

The following will be added to your site when you click the Finish button below.

They will not be sent an email notifying them of the site's availability.

Name	Id	Role	Status
CHRISTIE YOUNG	24634442	Student	Active



### Adding a non-NWU user

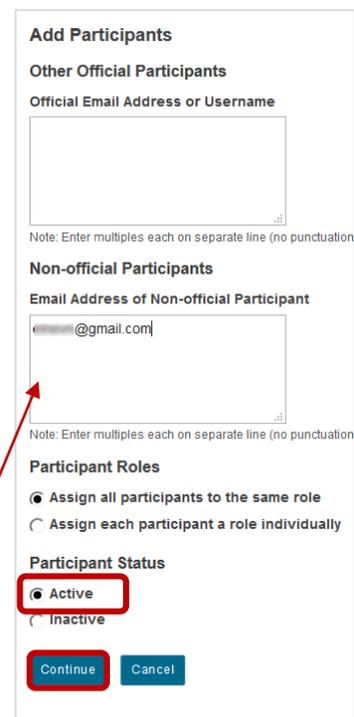
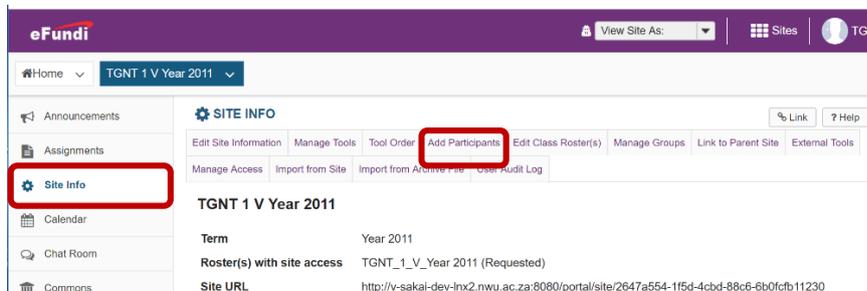
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If you have a guest who needs access to eFundi, you can give them access using their e-mail address.

Go to your module site, and enter the **Site Info** portal. Click the **Add Participants** tab at the top of the screen.

In the space provided for **Non-official Participants**, insert the e-mail address for the person you wish to grant access to.

Ensure that the *Participant Status* is **Active**, then click the **Continue** button.



E-mail address

Choose a Role for Participants

Roles

<input type="radio"/>	Additional instructor	Can read, add, and revise most content in their sections.
<input type="radio"/>	Instructor	Can read, revise, delete and add both content and participants to a site.
<input type="radio"/>	Student	Can read content, and add content to a site where appropriate.
<input type="radio"/>	Teaching Assistant	Can read, add, and revise most content in their sections.

Participants

2 (Name, Email)

**Continue** Back Cancel

Choose the role you wish to assign to this new participant.

When prompted, indicate that you want to **send an e-mail** to this person to inform them that they now have access, then click **Continue**.

Add participant(s) to ABCD 111 V 2017

An email can be automatically sent to the added users notifying them of the site's availability.

Send Now - send an email now to users notifying them that the site is available

Don't Send - do not send an email notifying new participants about the site's availability

**Continue** Back Cancel

A summary with the information will appear. Check that everything is correct, then click on the **Finish** button.

The following will be added to your site when you click the Finish button below.

They will be sent an email notifying them of the site's availability.

Name	Id	Role	Status
stevie@gmail.com	stevie@gmail.com	Instructor	Active

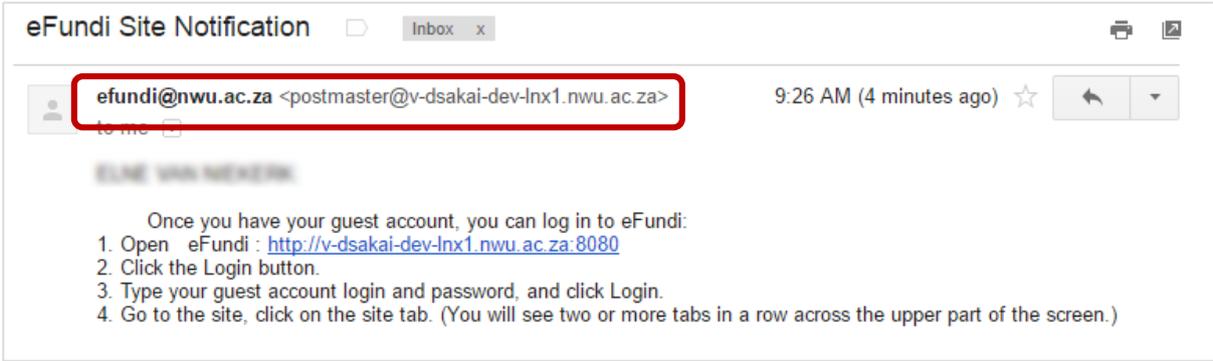
**Finish** Back Cancel

Your job is now done, but the outside participant still needs to follow some steps to get access to eFundi.

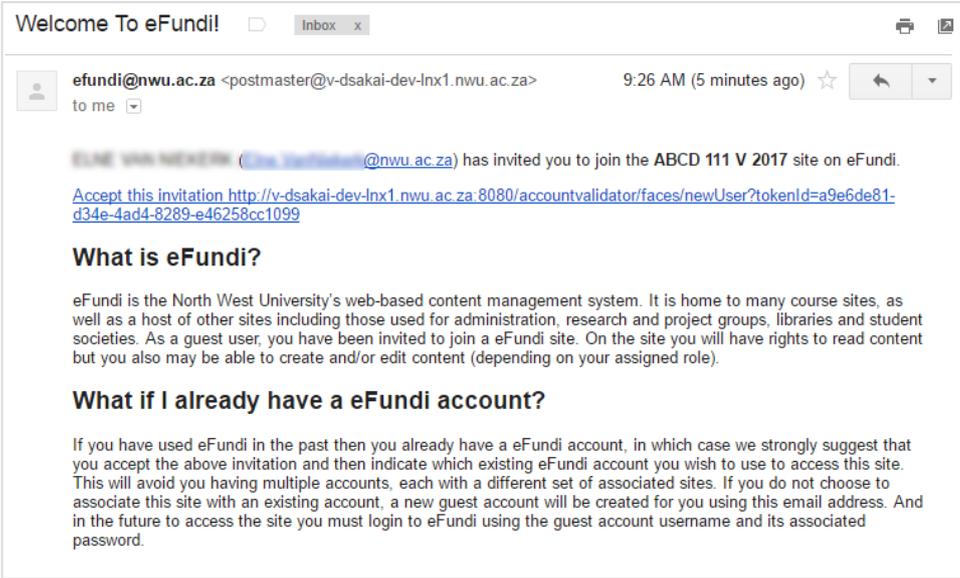
### Steps for outside users to join eFundi

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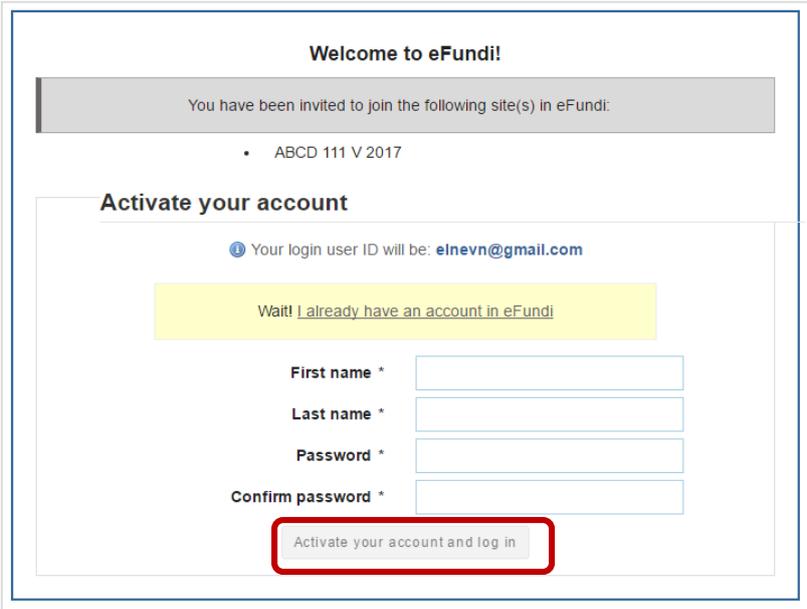
If this is the first time you are added to an eFundi site, you will receive two e-mails. The first e-mail is a **site notification e-mail** that looks like the example below:



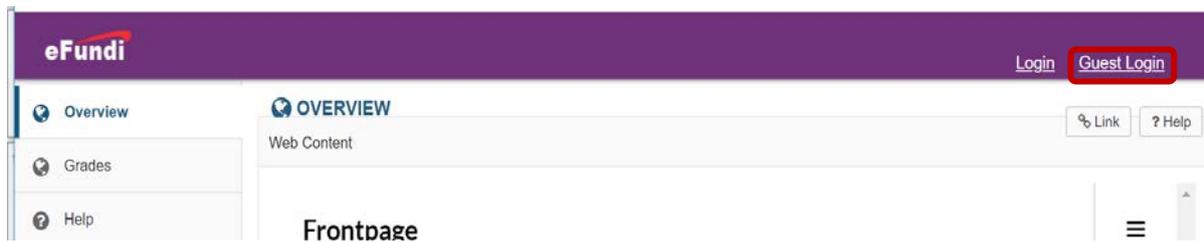
The second e-mail welcomes you to eFundi and provides instructions on how to setup an account. You must click on the link to accept the invitation:



You will be re-directed to the following window where you have to complete your details and create your **password** for eFundi, then click on the **Activate your account and log in** button.



You will be automatically logged in to eFundi. In future, if you want to log in to eFundi again, you will have to navigate to the eFundi landing page (<http://efundi.nwu.ac.za/portal/>) and click on the **Guest Login** link at the top right:



You will then sign in with your e-mail address and the password that they created:

### Login Required

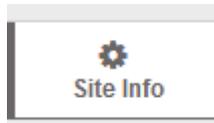
  

user id	<input type="text" value="Tutorial@gmail.com"/>
password	<input type="password" value="....."/>

## Removing participants from an eFundi site

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Start by navigating to Site Info of your module site:



You will see a list of all the participants who has access to your site.

Name ▲	Id	Credits	Role	Status	Remove?
amem@gmail.com ( amem@gmail.com )			Instructor ▼	Active ▼	<input type="checkbox"/>
Test, Test ( 00000000 )			Student ▼	Active ▼	<input type="checkbox"/>
Van Houtven, Elise ( 00000000 )			Instructor ▼	Active ▼	<input type="checkbox"/>

### To remove a student that was added automatically

You cannot completely remove a student who was added to your site automatically. To prevent the student from accessing the site, you will change the status to **inactive**, then click the **Update Participants**:

Name ▲	Id	Credits	Role	Status	Remove?
amem@gmail.com ( amem@gmail.com )			Instructor ▼	Active ▼	<input type="checkbox"/>
Test, Test ( 00000000 )			Student ▼	Inactive ▼	<input type="checkbox"/>
Van Houtven, Elise ( 00000000 )			Instructor ▼	Active ▼	<input type="checkbox"/>



### To remove a participant that was added manually

Any participant that you added to the site manually, will have to option to be completely removed from the site. Click on the tick box in the **Remove?** column next to the name of the participant you wish to remove, then click **Update Participants**:

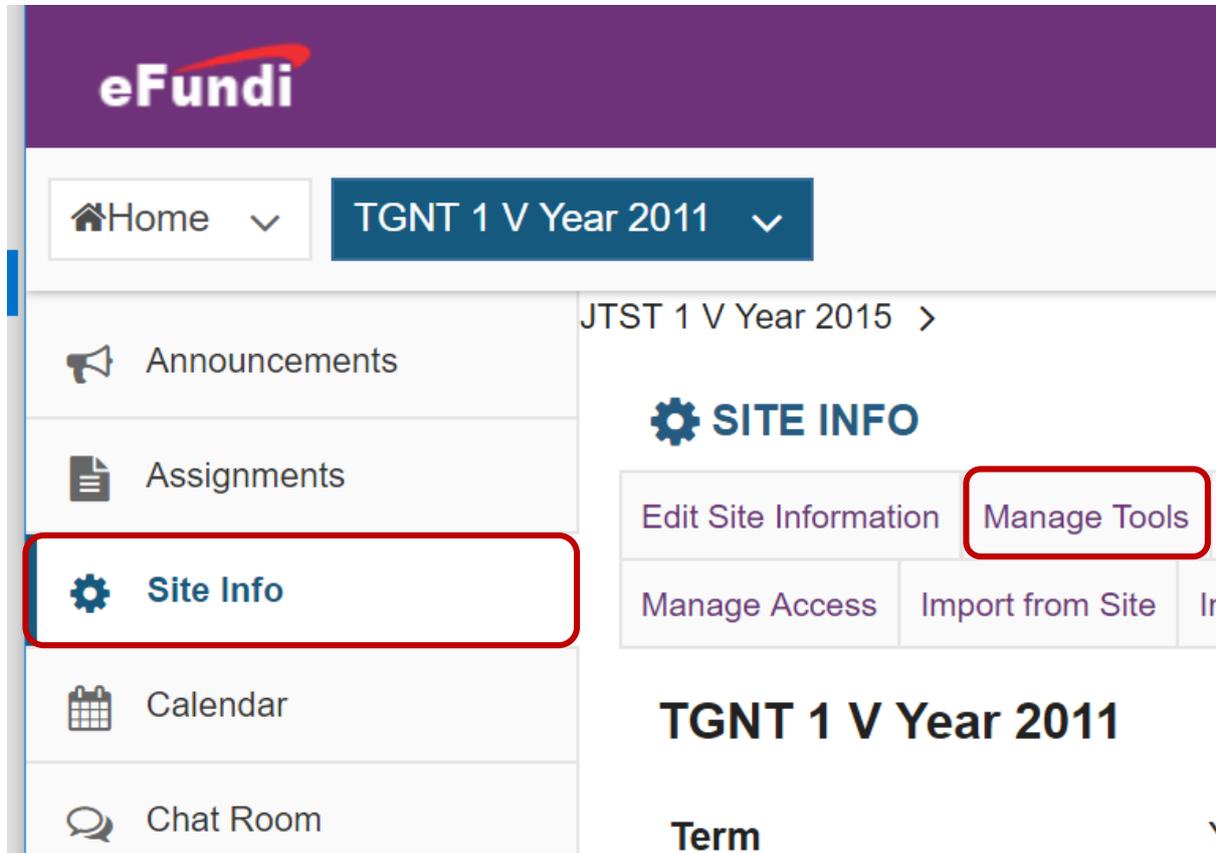
Name ▲	Id	Credits	Role	Status	Remove?
amem@gmail.com ( amem@gmail.com )			Instructor ▼	Active ▼	<input checked="" type="checkbox"/>
Test, Test ( 00000000 )			Student ▼	Inactive ▼	<input type="checkbox"/>
Van Houtven, Elise ( 00000000 )			Instructor ▼	Active ▼	<input type="checkbox"/>



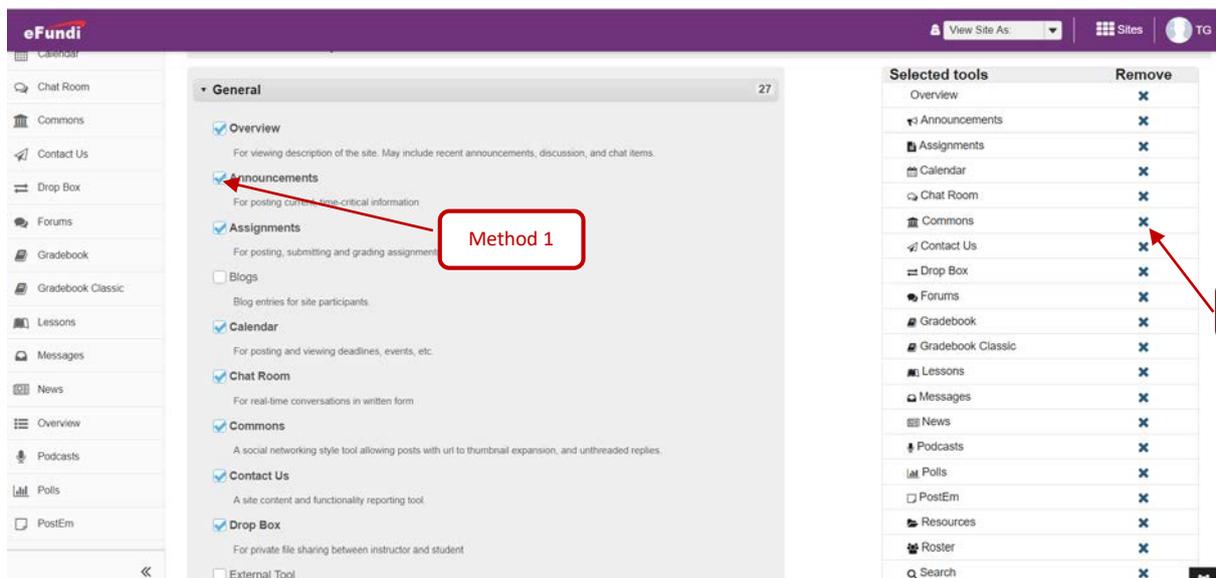
## Add and remove site tools

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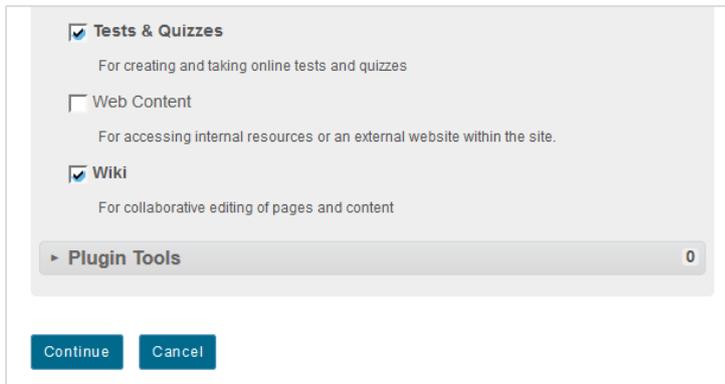
You may need to add or remove tools to and from your site after creating it. To do this, you will navigate to **Site Info** and select the **Manage Tools** tab at the top.



There are two methods to **remove** a tool from your site. **Method 1**: click on the checkbox next to the tool to remove the tick mark. **Method 2**: click on the cross next to the tool in the list on the right of your screen. Then scroll to the bottom of your screen and click **continue**.



To add a tool to your site, simply click in the box next to the name of the tool you wish to add. Ensure that a small tick appears in the box. Then scroll down to the bottom on the screen and click **continue**.

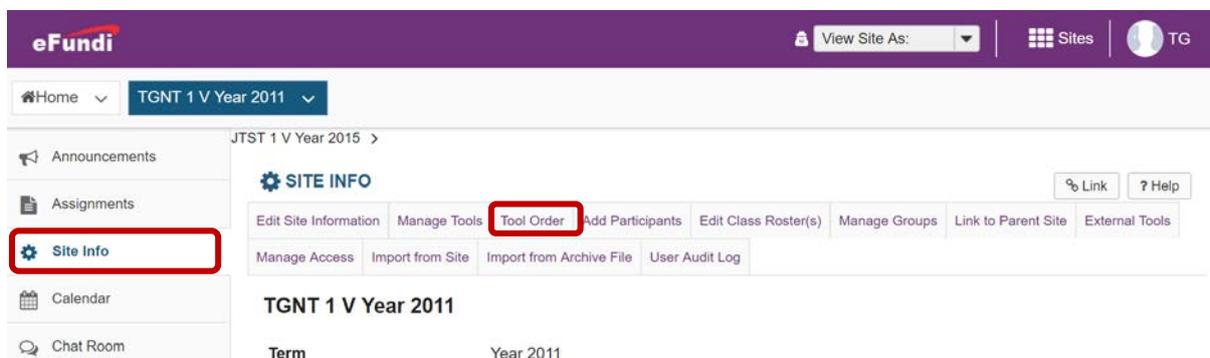


On the next screen a list of all your selected tools will appear for confirmation. Click the **Finish** button to add/remove the tools.

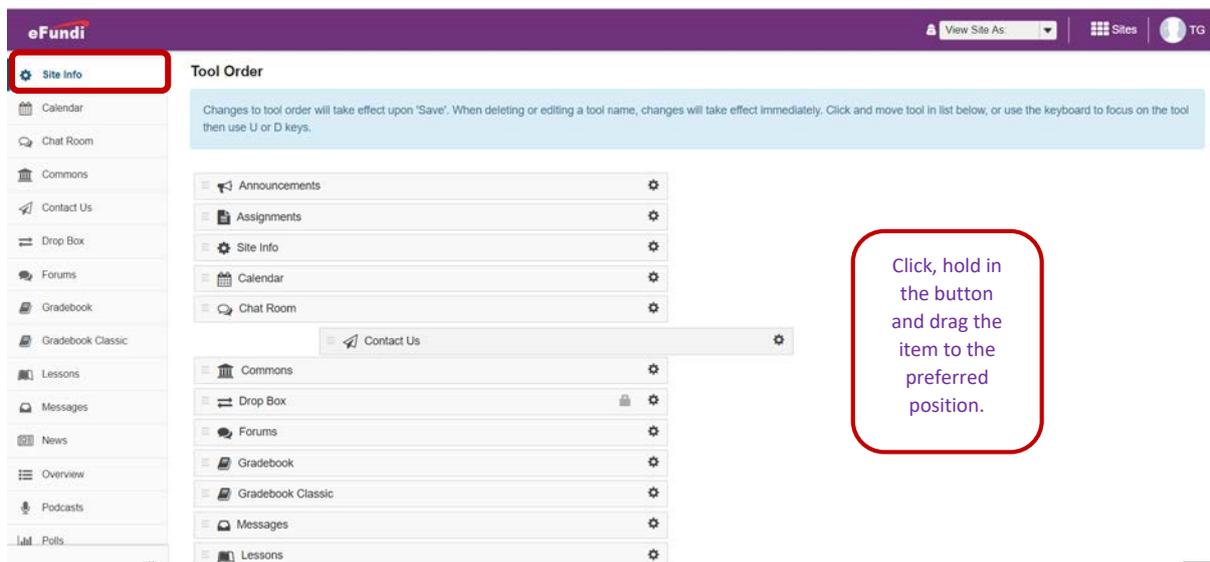
## Change tool order, names & visibility

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If you would like for the tools on your site display in a specific order, go to **Site Info** and choose the **Tool Order** option.



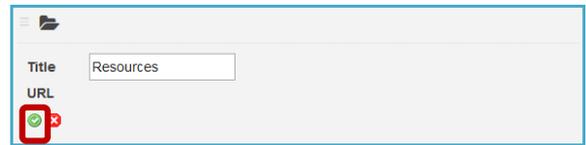
To change the order your tools appear in, drag and drop each tool in the order you would prefer.



To change the name or visibility of a tool, click on the gear icon of the tool, and make the change you would prefer.



If changing a tool name, click on the checkmark to confirm your changes:



After making all of your changes, remember to click the **Save** button at the bottom of the page.



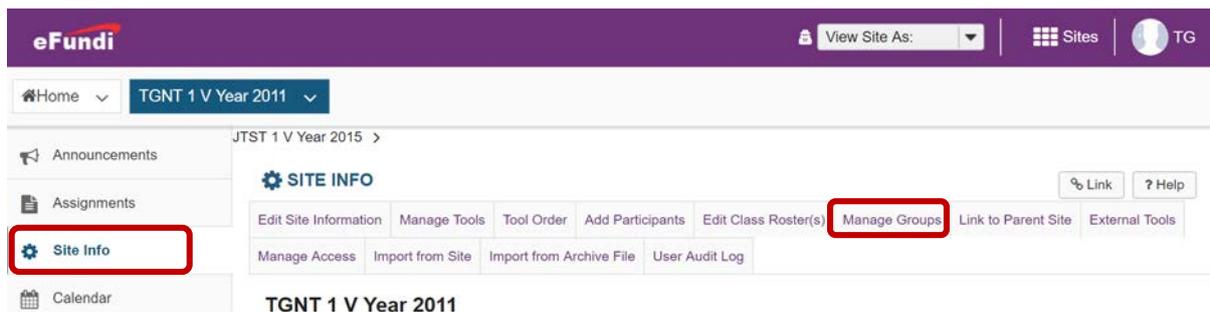
## eFundi Groups

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Once students have been added as participants to the site, you can create different groups on your site depending on your needs. Reasons for creating groups include the following:

- To split the class according to languages;
- To split the class according to lecturer (in cases where more than one lecturer presents the same module);
- To split the class according to mode of delivery (e.g. distance and contact groups)
- To release different assignments/tests/forums/forum topics to different groups of students (especially when you need to split a very large class into smaller groups to help with grading OR to grant second opportunities to submit work); and
- For when you are going to give group assignments that they must submit as a group.

To get started, navigate to **Site Info** and select the **Manage Groups** option.



In this section you will learn how to:

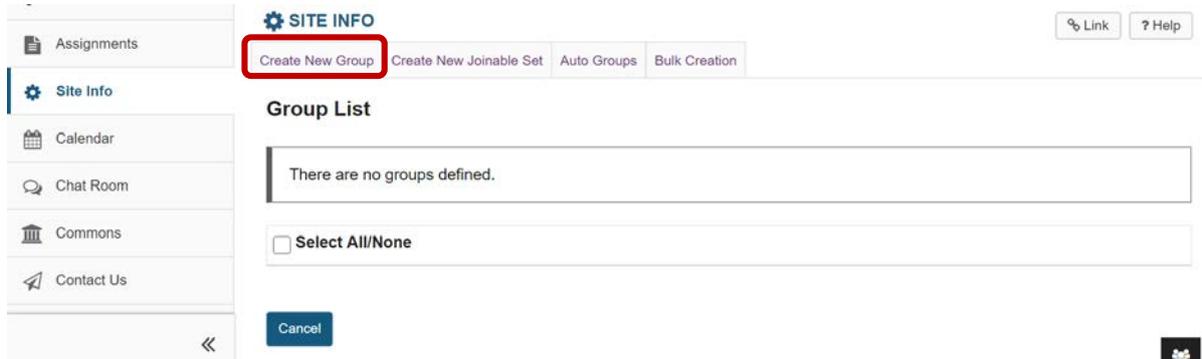
[Create/edit/remove a group](#)

[Create joinable sets](#)

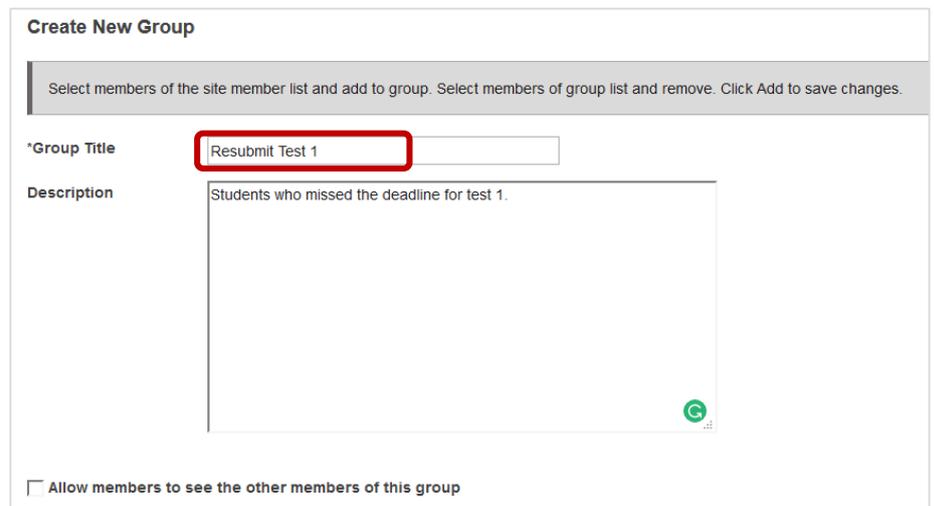
[Create groups using IMPORT FROM FILE](#)

## Create/edit/remove groups ([Back to eFundi groups](#))

To create groups, click on the **Create New Group** Tab.

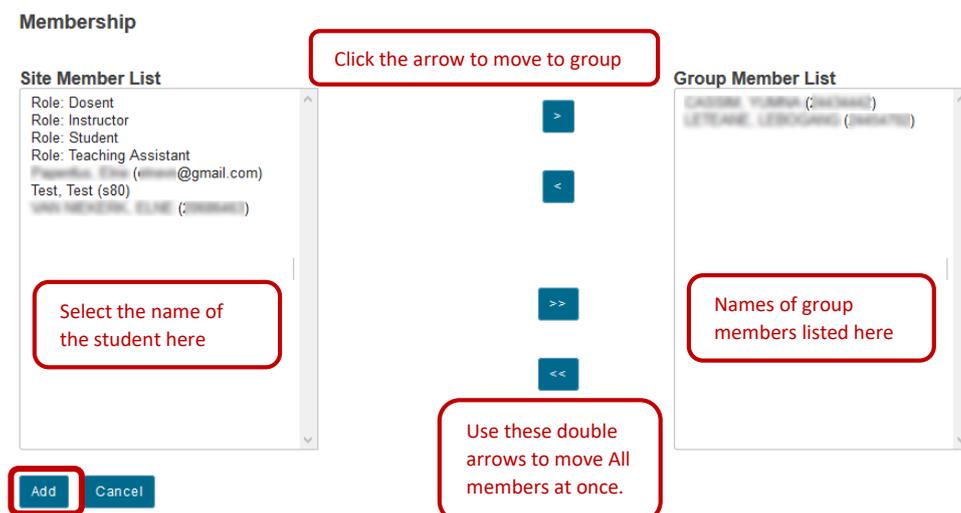


In the **Title** field, enter a title for your group. You may also add a text description.



At the bottom of the screen, select a site participant or role to add to the group and use the arrow key to move them to the new group. Repeat this step until you've added all the members you wish to the group. To select more than one member at a time, hold down the Ctrl key (in Windows) or the Command key (in Mac OS X), and select the members you wish to add.

When you're finished selecting all the group members, click **Add**.



To edit the group, click on the name of the group, make the changes and click the update button.



To remove a group, click on the **checkbox** next to the group name to let a tick mark appear, then click **Remove Checked**. When prompted, confirm that you want to delete the group.

#### Group List

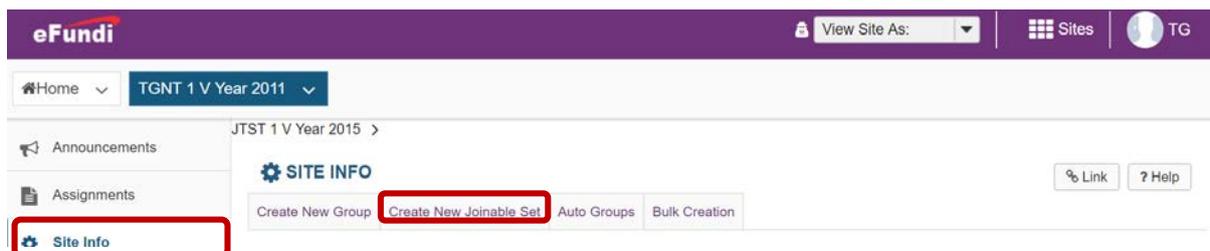
Group Title	Joinable Set	Size (Max)	Members	<input checked="" type="checkbox"/> Select All/None
<a href="#">Resubmit Test 1</a>	---	2	YUMBA CASINI, LEBONGANG LETANE	<input type="checkbox"/>



#### Joinable Sets [\(Back to eFundi groups\)](#)

Joinable sets consist of groups that students can choose to join. Each group in a set begins with the set name and ends with a unique number. An individual can join one group per set.

Navigate to **Site Info**, select the **Manage Groups** option and then select the **Create new joinable set** tab.



Provide a **set name**. In this example, the set is for students to work in groups for an assignment.

Complete the rest of the form then click the **Add** button to finish creating your set.

*Tip: examples of groups that can be created in a joinable set include: students working together on an assignment.*

#### Create Joinable Set

Joinable sets consist of automatically created groups that users can elect to join. An individual can join one group per set.

\* Set name:

\* Number of groups:

\* Max members per group:

Allow user to see group membership before joining

Allow members to see the other members of these groups after joining

Allow members to unjoin (leave) groups in this set after joining

**How do students join a group?** They must navigate to **Site Info**, then click on the **Groups you can join** bar. Once the different groups are displayed the student clicks on the **Join** button for the group they wish to join.

The screenshot shows a web interface with a left-hand navigation menu and a main content area. The 'Site Info' menu item is highlighted with a red box. The main content area displays site details such as Term, Site URL, Site contact and email, and LaTeX status. Below this is a 'Site Description' section with a text snippet and a '(More)' link. A blue bar labeled 'Groups you can join' is also highlighted with a red box. Below this bar is a table with columns for Title, Joinable Set, Size (Max), Members, and Join. Three rows of data are shown, each with a 'Join' button in the 'Join' column, which are also highlighted with a red box.

Title	Joinable Set	Size (Max)	Members	Join
Assignment 1 Groups 1	Assignment 1 Groups	0 (2)		Join
Assignment 1 Groups 2	Assignment 1 Groups	0 (2)		Join
Assignment 1 Groups 3	Assignment 1 Groups	0 (2)		Join

## Create groups using IMPORT FROM FILE ([Back to create groups index](#))

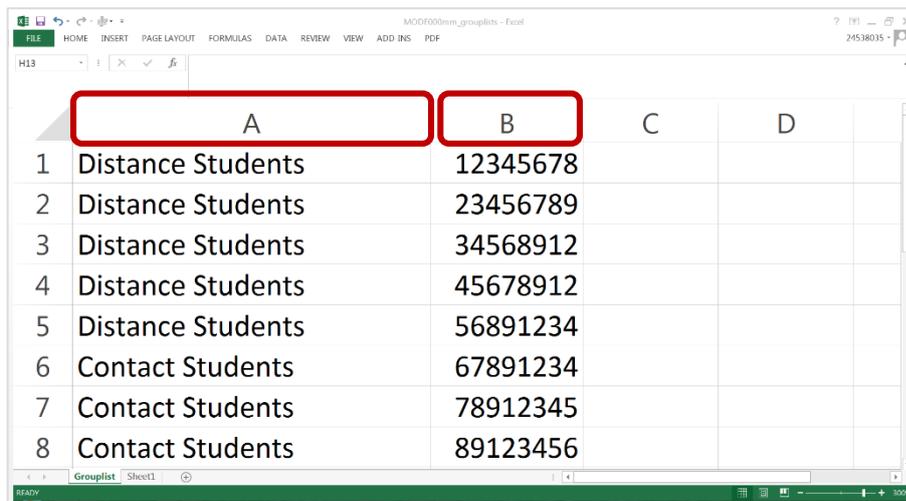
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Use the IMPORT FROM FILE option to create groups from a formatted list that you can import.

### On your computer, prepare the excel file for import to eFundi

Option: Download your class list in excel format from VARSITE  
(in some faculties this function is executed by assistants or administrative personnel).

Format your excel file so that it contains only two columns:



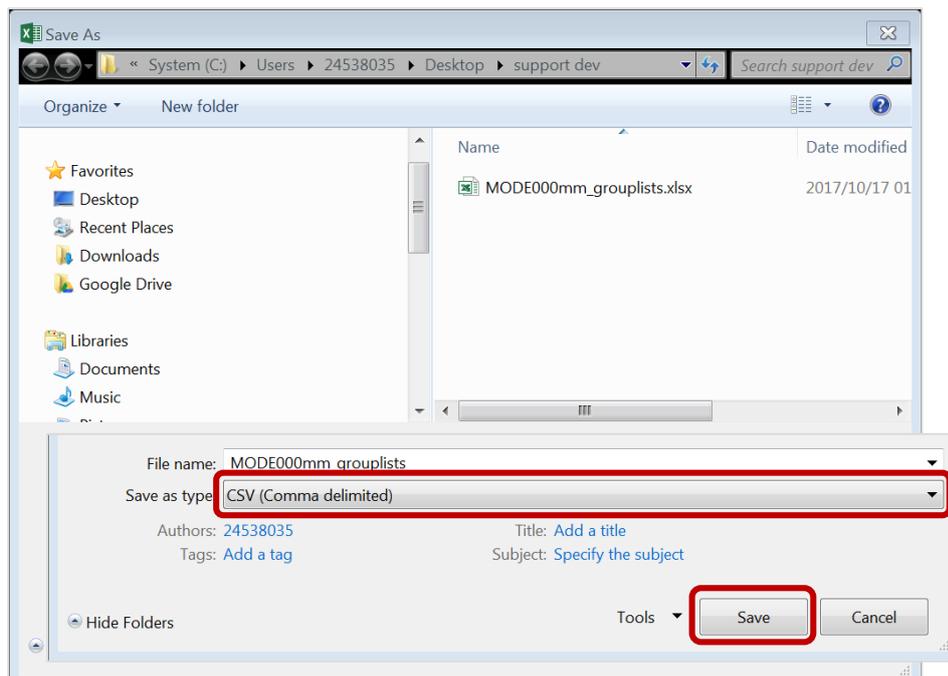
	A	B	C	D
1	Distance Students	12345678		
2	Distance Students	23456789		
3	Distance Students	34568912		
4	Distance Students	45678912		
5	Distance Students	56891234		
6	Contact Students	67891234		
7	Contact Students	78912345		
8	Contact Students	89123456		

Do not include a row of at the top for column headers.

Column A: Group title

Column B:  
Username/student numbers

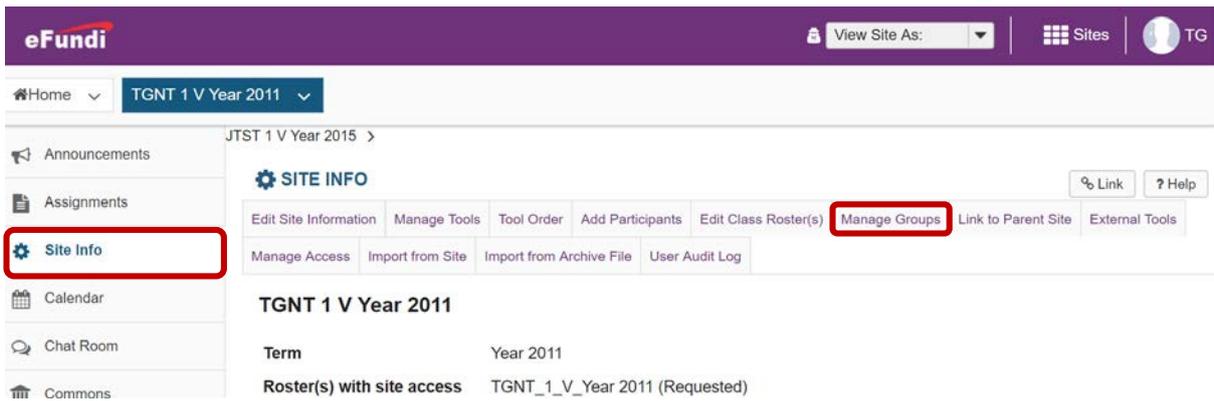
After formatting the excel file, SAVE AS CSV file



From the dropdown list next to SAVE AS TYPE, choose CSV

Click SAVE

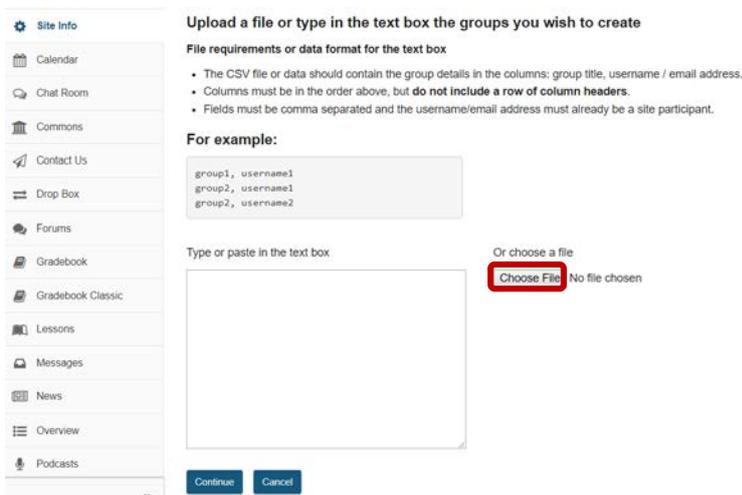
On eFundi, Go to SITE INFO, Choose MANAGE GROUPS option



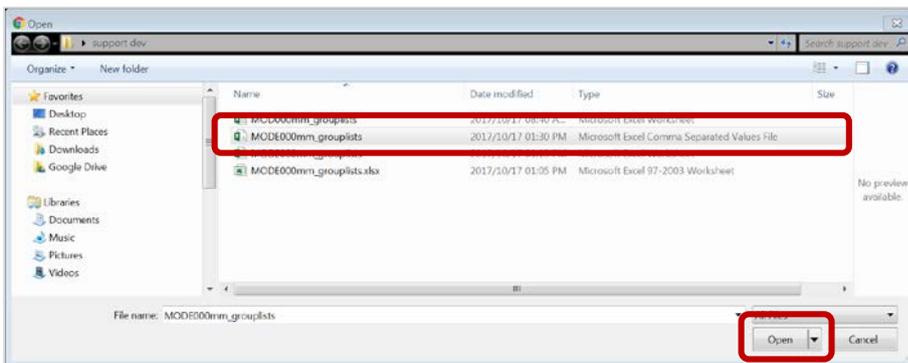
In **MANAGE GROUPS**, Choose the **IMPORT FROM FILE** option



Click on **CHOOSE FILE or BROWSE** to browse and select the relevant file from your computer.



On your computer -



Find and select your formatted grouplist CSV (Comma Separated Values) File

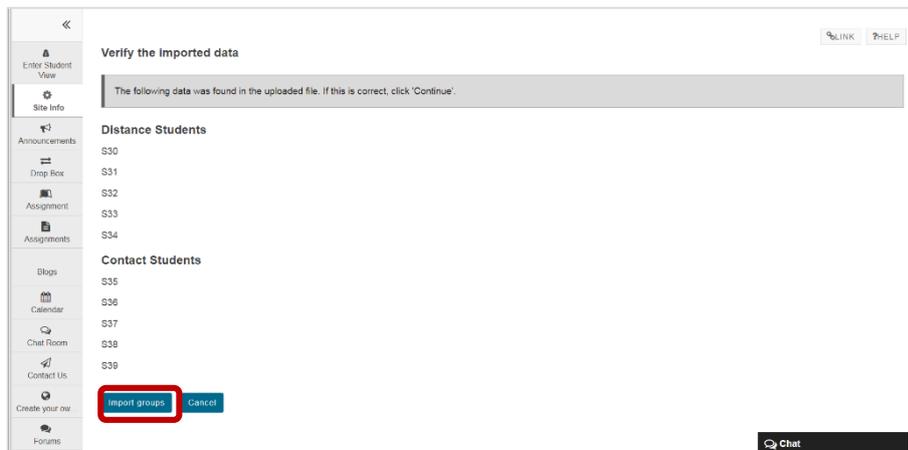
Click OPEN

The file will now be uploaded to eFundi.



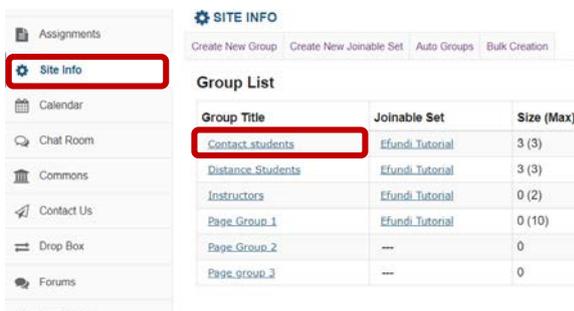
Click on **CONTINUE**

Verify the imported data



(S30-S39 represents students in this example)

Click **IMPORT GROUPS** to finalise the group creation



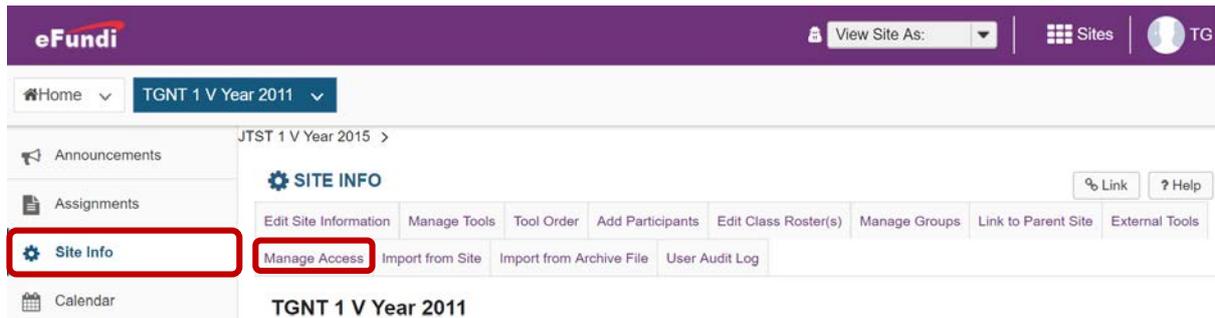
You will be able to view the groups and members in **SITE INFO > MANAGE GROUPS**.

## How to manage/change access to a site

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There are two scenarios where you might need to manage/change the access to your site. The first is if you need to un-publish your site so students cannot access it for whatever reason or if you need to publish a draft site. The second scenario is if you want to make your site joinable. This means anyone with access to eFundi can join your site as a participant.

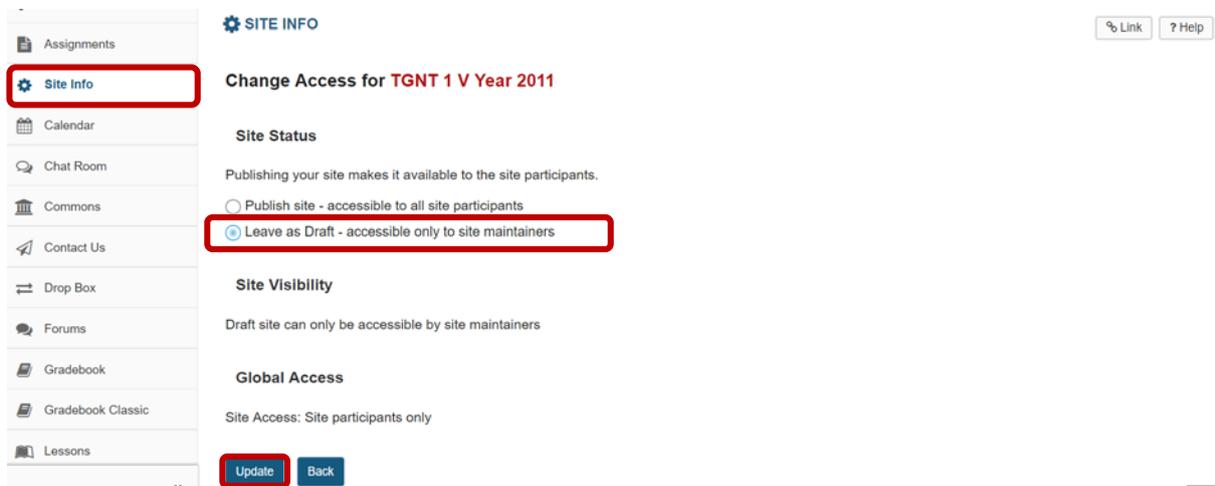
To change access to your site, navigate to your **Site Info** and select the **Manage Access** option.



## Un-publishing a site

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To un-publish the site (hide it from your students), change the **Site Status** to **Leave as Draft**, then click **Update**.



## To make a site joinable

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To make a site joinable, change **the Global Access** to **Allow any eFundi user to join the site**. Indicate the **role** you want to assign to anyone who joins your site, then click **Update**.

The screenshot shows the 'Change Access for TGNT 1 V Year 2011' page in the eFundi interface. The left sidebar has 'Site Info' highlighted. The main content area shows 'Global Access' settings. The 'Allow any eFundi user to join the site' option is selected. The 'Role for people that join site' dropdown is set to 'Student'. The 'Update' button is visible at the bottom.

## How do I add a class member list(s)?

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1. From your site, select the **Site Info Tool Menu**.
2. Click Edit Class roster list(s)

The screenshot shows the 'SITE INFO' tool menu. The 'Edit Class Member List(s)' option is highlighted. Below the menu, the site details for 'ASTS 111 V Year 2019' are displayed, including 'Term: Year 2019' and 'Member List(s) with site access: ASTS\_111\_V\_Year 2019 (Requested)'. The 'Site Info' menu item in the sidebar is also highlighted in red.

3. Click Add Roster(s)

The screenshot shows the 'Edit List of Members Access for ASTS 111 V Year 2019' page. The 'Add Member List(s)' button is highlighted. Below it, a table shows the 'List of Members' with one entry: 'ASTS\_111\_V\_Year 2019 (requested)' and a 'Remove' checkbox. The 'Site Info' menu item in the sidebar is also highlighted in red.

## How do I add a class member list(s) if you are the course linked instructor?

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4. IF you have COURSE LINKED to the member list, you will you receive the following message.

View Site A

LINK HELP

### Editing Course/Section Information for BUILD 2018

Add Member List(s) Access to BUILD 2018:

\* Academic term: Year 2018

EDCC 215 1-1 Use Official Description

EDCC 215 1-1 P 2018 Lecture

(A site including this course code already exists, [select anyway?](#))

LESE 212 1-1 Use Official Description

LESE 212 1-1 P 2018 Lecture  Select the relevant member list or lists to add to the site

\* Authorizer's username:

Email will be sent asking for authorization for you to create this site.

Special Instructions:

Continue Cancel

View Site A

LINK HELP

### Request Site Access: BUILD 2018...

Please confirm the addition of the following sections to your class site.

#### Class Information

The following class(es) were already assigned to this site:

BUILD\_000\_MM\_Year 2018BUILD\_000\_MM\_Year 2018 (Requested)

You have indicated the following class(es) to add to this site:

LESE 212 1-1 P 2018

Add Class(es) Back Cancel Confirm the addition of classes by selecting ADD CLASSES

Confirmation that the member lists have been added can be found under SITE INFO

**SITE INFO** % Link ? Help

[Edit Site Information](#)
[Manage Tools](#)
[Tool Order](#)
[Add Participants](#)
[Edit Class Roster\(s\)](#)
[Manage Groups](#)
[Link to Parent Site](#)
[External Tools](#)
[Manage Access](#)
[Import from Site](#)

[Import from Archive File](#)
[User Audit Log](#)

**TGNT 1 V Year 2011**

Term: Year 2011

Roster(s) with site access: TGNT 1 V Year 2011 (Requested)

eTesting\_1\_V\_Year 2011 (Requested)

Site URL: <http://v-sakai-dev-lnx2.nwu.ac.za:8080/portal/site/2647a554-1f5d-4cbd-88c6-6b0fcb11230>

**BUILD 2018 Participant List (# 20)**

Viewing 1 - 20 of 20 items

[Printable Version](#)

Name	Enrolled In	Id	Credits	Role
	LESE 212 1-1 P 2018		0	Student
5964 )	LESE 212 1-1 P 2018		0	Student
	LESE 212 1-1 P 2018		0	Student
	LESE 212 1-1 P 2018		0	Student
	LESE 212 1-1 P 2018		0	Student
	LESE 212 1-1 P 2018		0	Student

Student names will be listed here.

Sections

LESE 212 1-1 P 2018 ( Membership)

LESE 212 1-1 P 2018 Lecture

Groups

# How do I add a class member list(s) if you are not the course linked instructor

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If you have not **COURSE LINKED** to the member list, you will receive the following message. In this case **SELECT** the academic term and **ADD COURSE(S) AND / OR SECTION(S) NOT LISTED**.

Announcements  
Assignments  
Site Info  
Calendar  
Chat Room  
Commons  
Contact Us  
Drop Box  
Forums  
Gradebook

**SITE INFO**

### Editing Course/Section Information for TGNT 1 V Year 2011

Add Roster(s) Access to TGNT 1 V Year 2011:

\* Academic term: Year 2011

No rosters listing you as an instructor have been found for the term you have selected.

Add course(s) and/or section(s) not listed above...

Continue Cancel

eFundi View Site As: Sites TG

### Course/Section Information

Course/Section(s) Selection -- Year 2011

You have indicated the following class(es) to add to this site:

Please find course/section by entering the information below

Subject: Select

Course: Select

Section: Select

Current Selection: None

[Save and add another section](#)  
[Still cannot find your course/section?](#)

Continue Back Cancel

Select the Subject e.g. ABCD

Select the course/module code e.g. ABCD 111 1-1

Select the Section (Campus) M, P, V e.g. ABCD 111 1-1 M 2018

TGNT\_1\_V\_Year 2011 (Requested)

You have thus far selected the following course/section(s) to add to this course site:

Please find any[other] course/section by entering the information below:

	* Subject:	* Course:	* Section:
1	eTesting	1	V

Add More Roster(s)?

#### Authorization to Allow Roster(s) Site Access

At this time we cannot verify you are the instructor of record, please enter the username of a person that can verify you can create this site (e.g. department head, previous semester instructor). An email requesting authorization will be sent to this person. If there are multiple instructors for the course, please separate the usernames with comma signs.

\* Authorizer's username: 29915852

Email will be sent asking for authorization for you to create this site.

Special instructions:

Please enter additional comments that may help us authorize your site request.

Continue Back Cancel

If the module does exist, an email message requesting the instructor's authorization for the site will be sent to the courselinked instructor. Please provide details in the special instructions box.

If you still cannot find your course, click on **Still cannot find your course/section?**

**Current Selection: None**

[Save and add another section](#)

[Still cannot find your course/section?](#)

Continue

Back

Cancel

5. If you are not listed as the instructor of record for a course, enter the instructor's name. An email message requesting the instructor's authorization for the site will be sent.
6. You have the option of adding any information that may facilitate the authorization of your site request
7. Click **Continue** to add the member list(s)  
*Tip: If you have more member list(s) to add, click on the **Save and add another section** link to add additional sections.*

## Other functions in Site Info

[Back to index](#)

Other functions that you will find in Site Info include:

- Duplicating a site; and
- Importing content from one site to another.

Please contact your campus support for more information or assistance.

## Need help?

[Back to index](#)

You can make use of the Sakai based Help resources available on all eFundi sites, or contact your site of delivery eFundi Support Desk.

OR: Please attend eFundi training or stop by during office hours for additional help.

### **eFundi Support Desk:**

#### **Mafikeng**

E-mail: 25967878@nwu.ac.za

Tel.: 018 389 2447

Office: ADC Building, Block D,  
Office G80

#### **Potchefstroom**

E-mail: EFUNDI-PC@nwu.ac.za

Tel.: 018 285 2295

Office: Building E8, Room 107A

#### **Vaal Triangle**

E-mail:

VTC-EFUNDISTAFF@nwu.ac.za

Tel.: 016 910 3317/8

Office: Building 13, room SL313