edX Installation Documentation

Release 1.0.0

DLewis

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1	1. Introduction 1.1 The Goal 1.2 The Overall Process 1.3 The Result
2	2. Prerequisites 7 2.1 The Required Software Prerequisites 2.2 1. Microsoft Windows 7 Enterprise 2.3 2. Oracle VirtualBox 2.4 3. Vagrant 2.5 4. cURL for Windows
3	3. Install Operating System 1 3.1 Install Windows 7 Enterprise and Enable (NFS) 1
4	4. Install Oracle VirtualBox 13 4.1 Background 15 4.1.1 Oracle VirtualBox Download Page 16 4.1.2 Oracle VirtualBox Version for edX Installation 16 4.2 Installing VirtualBox 17 5. Install Vagrant 19
-	5.1 Background 19 5.2 Installing VirtualBox 19
6	6. Install cURL for Windows 2 6.1 Background 2 6.2 Installing cURL 2
7	7. Install edX27.1Background27.2Prerequisites27.3Installing the edX Platform2
8	5. Starting & Stopping edX 2' 8.1 Background

9	9. Install Utilities	37
10	10. Configure Email System	39
11	11. Install Custom Theming 11.1 The Process	41 41
12	Indices and tables	43

Contents:

1. Introduction

This section provides an introduction to installing Open edX on a single stand-alone computer.

Open edX is the software that powers edX-related online learning websites.

Open edX includes both a:

- Learning management system (LMS) for users to sign up, and register and take courses.
- Content management system (CMS), called Studio, to allow content providers to develop and publish content.

The edX environment has been developed using open source software. Open source software is software that has been licensed to be used by the general public for free.

edX software utilizes more than twenty four open source software languages, utilities, and technologies.

The operating system on which edX is based is Ubuntu, an open source Linux variant. The primary base programming language used to create edX is python.

Open edX provides scripts and documentation that can be used to install the Open edX environment.

1.1 The Goal

The ultimate goal of this documentation is to help you create a working instance of Open edX on a single computer, whereby a content developer could immediately use it to develop Open edX courses.

These instructions will describe the steps suggested to install a copy of the Aspen.1 production release of Open edX on a single Windows 7 Enterprise based personal computer.



1.2 The Overall Process

The overall installation process will involve the following major steps:

- 1. Install the host operating system, Windows 7 Enterprise Service Pack 1, and enable the Network File System (NFS) service.
- 2. Download additional required software.
- 3. Install the Oracle Virtual Box virtualization package.
- 4. Install the Vagrant provisioning and configuration package.
- 5. Install the cURL for Windows command line-based file transfer program.
- 6. Use Vagrant to download and install the Open edX environment.
- 7. Install additional useful software utilities.
- 8. Install and configure the mail system software.
- 9. Install and configure the Open edX-related Stanford Custom Theme.

1.3 The Result

After successfully installing the Open edX environment, you will have the ability to:

- 1. Login to the Learning Management System (LMS).
- 2. Login to the Content Management System (CMS), called Studio.
- 3. Register as a new user (as a student or staff member).
- 4. Register for a course (as a student or staff member).
- 5. Create new courses and content as a content provider and publisher.
- 6. Access the edX content from a browser running on your host operating system.

These steps will not necessarily make the courses available to anyone else, on the internet or otherwise.

More configuration will be necessarily for that.

The courses developed using this system could, however, be exported and then imported into a system that is accessible from the internet.

2. Prerequisites

This section describes the prerequisites for installing Open edX.

2.1 The Required Software Prerequisites

The Open edX platform has been implemented using a wide variety of software, including the python, ruby, and django programming languages, MySQL and mongodb database systems, the Nginx web server package, and the postfix email management system, to name a few.

To help ensure that the necessary software has been properly installed and configured to work together, several software installation and provisioning packages have been utilized.

To reduce the likelihood that the resulting edX development environment software will interfere with, or be disturbed by, other software already running on your computer, a virtual environment is used. The virtual environment created allows you to install an additional operating system on your computer, where you can then install software and run the operating system and software alongside your original operating system, as if it were running on a separate computer.

In our case, we will use Microsoft Windows 7 Enterprise as the host operating system.

Onto Windows 7 Enterprise, we will install a virtualization package and a few other software packages.

We will then execute a script provided by Open edX and its supporters that will create a virtual machine environment and install the rest of the edX platform software within that virtual machine environment.

You will need the following software:

- 1. Windows 7 Enterprise 64-bit
- 2. Virtual Box 4.3.16r95972
- 3. Vagrant 1.5.4
- 4. cURL for Windows 7.40.0

It would be helpful to go ahead and download these packages as a first step. Links to the packages are provided below.

2.2 1. Microsoft Windows 7 Enterprise

First, you will need the host operating system, Microsoft Windows 7 Enterprise, Service Pack 1.

You need the Enterprise (or Ultimate) version because that version comes with a systems service that the edX platform needs, called Client for Network File System (NFS).

Windows 7 Professional, and other versions of Windows 7, do not come with this NFS service.

You can buy a copy of Windows 7 Enterprise from Microsoft, a retail store, or online.

You can also download a 90 day evaluation copy of it from Microsoft here:

• http://www.microsoft.com/en-us/evalcenter/evaluate-windows-7-enterprise

2.3 2. Oracle VirtualBox

Oracle VirtualBox is open source software you can use to install additional operating systems onto your computer.

VirtualBox will give you the ability to create a *virtual machine environment*, which is a separate operating system environment into which you can install software and store data.

You will need Oracle VirtualBox Version 4.3.16, and the companion extension pack for it.

NB: Earlier or more recent versions of this package need not necessarily work, so, be sure to get this version, in particular.

The homepage for Oracle VirtualBox: https://www.virtualbox.org/

You can find the versions you need for 64-bit Windows 7 here:

- http://download.virtualbox.org/virtualbox/4.3.16/VirtualBox-4.3.16-95972-Win.exe
- http://download.virtualbox.org/virtualbox/4.3.16/Oracle_VM_VirtualBox_Extension_Pack-4.3.16-95972.vbox-extpack

2.4 3. Vagrant

Vagrant is open source software that will allow you to run scripts to more easily and reliably install and configure software.

A single Vagrant script will install the bulk of the operating environment for Open edX.

The Vagrant software version we will use is 1.5.4.

NB: Earlier or more recent versions of this package need not necessarily work, so, be sure to get this version, in particular.

The homepage for Vagrant: https://www.vagrantup.com/

You can find the Vagrant Version 1.5.4 that you need for 64-bit Windows here:

• https://dl.bintray.com/mitchellh/vagrant/vagrant_1.5.4.msi

2.5 4. cURL for Windows

cURL for Windows is an open source command line tool and library for transferring data and downloading software using URL syntax.

This tool will be used to download the Vagrant script file that you will use to install the bulk of the edX environment.

The homepage for Confused by Code: http://www.confusedbycode.com/

You can find the curl version that you need for 64-bit Windows here:

- cURL for Windows web page http://www.confusedbycode.com/curl/
- cURL for Windows direct download link http://www.confusedbycode.com/curl/curl-7.40.0-win64.msi

3. Install Operating System

Windows 7 Enterprise will be the base operating system onto which all the other software will be installed.

We will refer to it as the *host* operating system.

You need the Enterprise (or Ultimate) version because that version comes with a systems service that the edX platform needs, called Client for Network File System (NFS).

Windows 7 Professional, and other versions of Windows 7, do not come with this NFS service.

You can buy a copy of Windows 7 Enterprise from Microsoft, a retail store, or online.

You can also download a 90 day evaluation copy of it from Microsoft here:

http://www.microsoft.com/en-us/evalcenter/evaluate-windows-7-enterprise

3.1 Install Windows 7 Enterprise and Enable (NFS)

To install the Client for Network File System (NFS) service, we can do the following:

- 1. Install Windows 7 Enterprise as normal.
- 2. Click the Start button at the bottom left of the Windows Start menu, find "Control Panel" on the right side of the Menu Selection Panel, and CLICK it.



3. Within the Control Panel, find the "Programs and Features" selection, and CLICK it.

troi Panei Items 🕨			 Search Control Panel
			View by: Small icons 🔻
🍘 Administrative Tools	🖬 AutoPlay	🐌 Backup and Restore	🏘 BitLocker Drive Encryption
Credential Manager	🖆 Date and Time	🍘 Default Programs	🚔 Device Manager
🛄 Display	Ease of Access Center	📕 Flash Player (32-bit)	📔 Folder Options
🔠 Getting Started	🜏 HomeGroup	🚑 Indexing Options	🐑 Internet Options
E Keyboard	Location and Other Sensors	Ø Mail	Ø Mouse
🛄 Notification Area Icons	DVIDIA Control Panel	🗠 NVIDIA nView Desktop Manager	🐻 Parental Controls
Personalization	Phone and Modem	Power Options	Programs and Features
🔊 Region and Language	🐻 RemoteApp and Desktop Connections	🛋 Sound	Speech Recognition
19 System	🛄 Taskbar and Start Menu	Troubleshooting	& User Accounts
iiii Windows Defender	🔐 Windows Firewall	Windows Update	
	 Administrative Tools Credential Manager Display Getting Started Keyboard Keyboard Personalization Region and Language System Windows Defender 	trol Panel Items >	trol Panel Items >

Control Panel Home							
	Uninstall or change a program						
/iew installed updates	To uninstall a program, select it from the list and	then click Uninstall Change or Repair.					
Furn Windows features on or							
ff	Organize 💌					8==	-
	Name	Publisher	Installed On	Size	Version		
	7-Zip 9.20 (x64 edition)	Igor Pavlov	9/28/2014	4.53 MB	9.20.00.0		
	Acronis True Image 2014	Acronis	9/24/2014	371 MB	17.0.4515		
	Adobe After Effects CC 2014	Adobe Systems Incorporated	12/21/2014	2.01 GB	13.2.0		
	4 Adobe AIR	Adobe Systems Incorporated	10/18/2014		3.1.0.4880		
	Adobe Audition CC 2014	Adobe Systems Incorporated	12/21/2014	678 MB	7.2.0		
	Adobe Captivate 8 (64 Bit)	Adobe Systems Incorporated	1/16/2015	3.14 GB	8.0.1		
	Adobe Captivate Quiz Results Analyzer	Adobe Systems, Incorporated	1/16/2015		8		
	Adobe Creative Cloud	Adobe Systems Incorporated	11/17/2014	197 MB	2.8.1.451		
	Mobe Dreamweaver CC 2014	Adobe Systems Incorporated	10/18/2014	661 MB	15.0.0		
	Adobe Edge Animate CC 2014.1	Adobe Systems Incorporated	12/21/2014	173 MB	5.0.1		
	Adobe Fireworks CS6	Adobe Systems Incorporated	10/19/2014	692 MB	12.0.1		
	Adobe Flash Player 15 ActiveX	Adobe Systems Incorporated	11/8/2014	6.00 MB	15.0.0.189		
	i Adobe Help Manager	Adobe Systems Incorporated	10/18/2014		4.0.244		
	Adobe Illustrator CC 2014	Adobe Systems Incorporated	12/21/2014	904 MB	18.1.1		
	🖬 Adobe Media Encoder CC 2014	Adobe Systems Incorporated	12/21/2014	1.39 GB	8.2.0		
	Adobe Photoshop CC 2014	Adobe Systems Incorporated	12/21/2014	1.76 GB	15.2.2		
	Adobe Premiere Pro CC 2014	Adobe Systems Incorporated	12/21/2014	1.74 GB	8.2.0		
	Adobe Reader XI (11.0.09)	Adobe Systems Incorporated	10/1/2014	184 MB	11.0.09		
	🚱 Altova XMLSpy® 2011 sp1 Enterprise Edition	Altova	10/25/2014	260 MB	2011.00.01		
	Audacity 2.0.6	Audacity Team	11/5/2014	47.2 MB	2.0.6		
	Axure RP Pro 7.0	Axure Software Solutions, Inc.	11/26/2014		7.0.0.3174		
	k calibre 64bit	Kovid Goyal	11/17/2014	186 MB	2.10.0		
	Core FTP LE (x64)		9/28/2014				
	CURL CURL	Confused by Code	9/10/2014	3.66 MB	7.37.0		
	CutePDF Writer 3.0	Acro Software Inc.	9/28/2014		3.0		

4. Within Programs and Features, find "Turn Windows features on or off", on the left panel, and CLICK it.

5. Scroll through the list until you locate "Services for NFS".



6. CLICK the + plus sign to display both available options, and then CLICK all three checkboxes.

💽 Windows Features	x
Turn Windows features on or off	?
To turn a feature on, select its check box. To turn a feature off, clear its check box. A filled box means that only part of the feature is turned on	
E Services for NFS	-
Administrative Tools	
Client for NFS	
🕀 🗐 🖟 Simple Network Management Protocol (SNMP)	
Simple TCPIP services (i.e. echo, daytime etc)	
Subsystem for UNIX-based Applications	
Tablet PC Components	=
🔲 🍌 Telnet Client	-
🗐 🍌 Telnet Server	
TFTP Client	
🔜 📗 Windows Gadget Platform	
Im Windows Process Activation Service	Ŧ
OK Cancel	

- 7. CLICK the OK button to enable all the Services for NFS, including the Client for NFS service.
- 8. Reboot the computer.

That completes the process for enabling Windows 7 Enterprise's NFS services.

4. Install Oracle VirtualBox

4.1 Background

Oracle VirtualBox is open source software that allows you to install additional operating systems onto your computer.

VirtualBox extends the capabilities of your existing computer so that it can run multiple operating systems (inside multiple virtual machines) at the same time.

4.1.1 Oracle VirtualBox Download Page



(This image shows version 4.3.12, but we will not use that version)

4.1.2 Oracle VirtualBox Version for edX Installation

To install Open edX, we will use Oracle VirtualBox Version 4.3.16, and the companion extension pack for it.

Note that earlier, or even more recent, versions of this package might not be compatible with the rest of the platform. So, be sure to get this version, in particular.

The homepage for Oracle VirtualBox is here: https://www.virtualbox.org/

You can find the versions you need for 64-bit Windows 7 here:

- http://download.virtualbox.org/virtualbox/4.3.16/VirtualBox-4.3.16-95972-Win.exe
- http://download.virtualbox.org/virtualbox/4.3.16/Oracle_VM_VirtualBox_Extension_Pack-4.3.16-95972.vbox-extpack

4.2 Installing VirtualBox

- 1. Click the previously downloaded VirtualBox-4.3.16-95972-Win.exe setup program.
- 2. Follow the prompts to install. Accept all of the default option settings.

5. Install Vagrant

5.1 Background

Vagrant is open source software that will allow you to run scripts to more easily and reliably install and configure software.

A single Vagrant script will install the bulk of the operating environment for Open edX.

The Vagrant software version we will use is 1.5.4.

Note that earlier or more recent versions of this package need not necessarily work. So, be sure to get this version, in particular.

The homepage for Vagrant: https://www.vagrantup.com/

You can find the Vagrant Version 1.5.4 that you need for 64-bit Windows here:

• https://dl.bintray.com/mitchellh/vagrant/vagrant_1.5.4.msi

5.2 Installing VirtualBox

To install VirtualBox:

- 1. Run the downloaded installer program.
- 2. Follow the prompts. Accept all of the default option settings.
- 3. Once installed, reboot your computer.

The Vagrant installer updated the path system variable with the location of the program.



6. Install cURL for Windows

6.1 Background

cURL for Windows is a command line tool and library for transferring data and downloading software using URL syntax.

This tool will be used to download the Vagrant script file that you will use to install the bulk of the edX environment.

The homepage for Confused by Code is here: http://www.confusedbycode.com/

We will use version curl-7.40.0-win64.

You can find the curl version you need for 64-bit Windows here:

- cURL for Windows web page http://www.confusedbycode.com/curl/
- cURL for Windows direct download link http://www.confusedbycode.com/curl/curl-7.40.0-win64.msi

6.2 Installing cURL

- 1. Run the downloaded installer.
- 2. Follow the prompts.
- 3. Once installed, reboot your computer.

7. Install edX

7.1 Background

The edX platform is based an a wide variety of software components.

Each component must be of the right (compatible) version, and must be configured to work well with the other components.

To help ensure that all the software has been installed and configured as required, installation, provisioning, and configuration software from Vagrant and Ansible has been used.

A script written in the Vagrant scripting language will be used, which will call other pograms, including Ansible scripts.

This makes it possible for a person to install the base edX platform with just a few commands.

7.2 Prerequisites

To install Open edX using the Vagrant script, the following software must have already been installed:

- 1. Windows 7 Enterprise, with Services for NFS enabled.
- 2. Oracle VirtualBox 4.3.16 and its extension pack.
- 3. Vagrant 1.5.4
- 4. cURL version 7.40.0

7.3 Installing the edX Platform

The edX Platform is packaged in a VirtualBox image or "box".

For the purposes of these instructions, we will install the birch release of edX.

The size of the box for the birch release is approximately 2.8GB. It will take a while to download.

The Vagrant installation script will download the box, create a VirtualBox virtual machine instance with Ubuntu as the operating system, and then install and configure all the code it needs into Ubuntu within that virtual machine.

We will install the edX Platform by running the Vagrant script from the command line.

All you have to do is create the directory from which you would like to run edX, and run the Vagrant script.

So, let "edx_birch" will be the name of the directory. You can, however, use any name you like.

1. Open a command line session with Administrator Rights, by Clicking the Start Button, Accessories, and Command Prom Right click it, and select Run as Administrator.



- 2. Create a directory for edX: md edx_birch
- 3. Make that directory the current directory: cd edx_birch
- 4. Download the Vagrant script file, using the cURL programs, by copy and pasting curl line below into the command promp curl -L https://raw.githubusercontent.com/edx/configuration/master/vagrant/release/fullstack/Vagrantfile > Vagrantfile

Note: The Vagrantfile you will download with the previous command will default to installing the kifli version of edX, not the birch version.

To install the birch release:

(a) Create an OPENEDX_RELEASE environment variable in Windows

• Create the Windows environment variable: OPENEDX_RELEASE="named-release/birch"

To do so:

- i. Click the Start button, right click My Computer and select Properties.
- ii. Click the Advanced Systems Settings option on the panel on the left.
- iii. Click the Environment Variables button.
- iv. In the System Variables List, at the bottom half of the window, click the New... button.
- v. Enter as the Variable Name: OPENEDX_RELEASE
- vi. Enter as the Variable Value: named-release/birch
- vii. Click OK to save the new system variable.
- viii. Reboot the computer immediately.
- (b) Modify the newly downloaded Vagrantfile, replacing the default reference with a reference to the named-release/birch version.
- 5. Install the Vagrant hostsupdater plugin: vagrant plugin install vagrant-hostsupdater
- 6. Create the Fullstack virtual machine, by having Vagrant run the script: vagrant up
- 7. Reboot the computer.

5. Starting & Stopping edX

8.1 Background

The edX platform will run under a virtual machine environment. The platform runs under the Ubuntu operating system. Once the platform has been installed, you can start it using VirtualBox.

8.2 Starting edX

1. Load the VirtualBox program by clicking it on the Start Menu or double clicking its program icon.



2. Click the Aspen entry on the lefthand side, and then click the Start button on the toolbar.



3. The virtual machine will start in a command window. Commands will execute there.

🐕 aspen [Running] - Oracle VM VirtualBox		X	
Machine View Devices Help			
/dev/sda1: 230/124496 files (1.3% non-contiguous), 40607/248832 blocks			
would all. ISCK / DOUL ISSUE LETTINALEA WITH STATUS I	г	עח	
* Starting System Duging databases		עט עט	
* Starting Boil status Multitur		עט עט	
Skinning profile in zetczannarmor.dzdisable: usr.sbin.rsuslogd		UN	
* Starting AnnArmor profiles	Г	UK	1
Starting memoached: * Stomning Sustem V initialisation commatibility	ſ	NK	i I
* Starting Sustem V runlevel compatibility	Г	OK	1
* Starting supervisord	[]	OK	j
* Starting deferred execution scheduler	[[OK	1
* Starting regular background program processing daemon	[OK	1
* Starting supervisord	[[OK]
* Starting save kernel messages	[[OK]
* Stopping save kernel messages	[[OK]
* Starting CPU interrupts balancing daemon	[[OK]
memcached.			
Starting nginx: nginx.			
* Stopping cold plug devices	[[OK]
* Stopping log initial device creation	[[OK	1
* Starting configure network device security	[]	OK	1C
hecking disk drives for errors. This may take several minutes.			
Press C to cancel all checks in progress			
* Starting Userspace bootsplash	Γ	OK	1
* Stopping Userspace bootsplash		UK	
* Starting Postfix Mail Transport Agent postfix		UK	1
	Right	Ctrl	
	_	-	

4. A login screen will display while edX loads, in 30 secs or so. You do not need to login.



5. Load the Learning Management System by entering 192.168.33.10 into a browser in Windows.

otk Your Platform Name Her ×	And a second	
← → C 🕒 192.168.33.10		☆ =
👯 Apps 🗀 FEOEF 🍋 FLC 🦳 My edX 🗀 edX	: 🗀 Harvard 🦳 Education 📋 Technology 🦳 Misc 🔤 CNN 👸 The New York Time 🏦 ebay 🦁 KAT M Gmail 💈 Google 🕑 We	Icome to Twitter » 📋 Other bookmarks
	R NOW	Log in
	The Future of Online Education for anyone, anywhere, anytime	
DemoX edX Demonstra	ation Course	
About Jobs News FAC	2 Contact POWERED BY	edX

6. Load the edX Content Management System (CMS) by entering 192.168.33.10:18010 into a browser:



7. Login using a pre-built user account: ID: staff@example.com Password: edx

etik Log into your Your Platfor x		• ×
← → C 192.168.33.10/login	9	7☆ ≣
🔢 Apps 🗀 FEOEF 🦳 FLC 🗀 My edX 🦳 edX 🦳 Harvard 🗀 Education 💭 Technology 🗋 Misc 🧧 CNN 👸 The New York Time 🏦 e	ebay 🦁 KAT M Gmail 🔝 Google 🈏 Welcome to Twitter 🛛 » 🗀 Other	bookmarks
PLEASE LOG IN to access your account and courses	asse will	
E-mail *	NOT ENROLLED?	
staff@example.com	Sign up for Your Platform Name Here today!	
This is the e-mail address you used to register with Your Platform Name Here	NEED HELP?	
Password * Forgot password?	Looking for help in logging in or with your Your Platform Name Here account? View	
	our help section for answers to commonly asked questions.	
Remember me *		
Log into My Your Platform Name Here Account + Access My Courses		
About Jobs News FAQ Contact		
© 2014 Your Platform Name Here, some rights reserved		
Terms of Service and Honor Code - Privacy Policy		
U		

8. You are now logged into edX and your Dashboard of registered courses is displayed.

					☆ staff ・
staff	CURRENT COURSES	edX		Course Sto	rted - Eeh 05, 2013
EMAIL (edit) staff@example.com	0.eox 0 带 带	DemoX ed>	(Demonstra	tion Course	Unregister
Keset Pessword					
About Jobs News FAQ Contact					
• 2014 Your Hour Hadron Hammer Peters Soliter rights reserv Terms of Service and Honor Code - Pilvacy Policy	80				

8.3 Stopping edX

1. To log out of edX, CLICK the Staff or Student button at the top right of the Dashboard, and select Log Out.



2. To close the virtual machine, click the standard Close Window X icon at the top right of the window in which Ubuntu is ru



3. Select the Power Off the machine, option and press CLICK the OK button. The window will close and the virtual machine will be unloaded.

9. Install Utilities

Several additional utility programs will make working with Open edX much easier.

10. Configure Email System

This section describes how to install and configure the email system.

• Installing the Mail System

11. Install Custom Theming

It is possible to customize the look-and-feel of your instance of Open edX, though it might not be as simple and straightforward as some might like.

The team at edX.org says that they plan to provide a more straightforward means of doing so at some point in the future.

Meanwhile, the theme known as the "Stanford-Online edX Theme" is available, and is said to provide some facility whereby one can more easily customize the learning management system (LMS) of Open edX.

The content management system (CMS) Studio look-and-feel will not affected by this customization.

11.1 The Process

- 1. Log into the Ubuntu instance, using the vagrant User ID (the ID and password are each vagrant).
- 2. Modify the lms.env.json file that can be found in the /edx/app/edxapp directory. You can do so with the characterbased editor nano, using the following command:

sudo nano /edx/app/edxapp/lms.env.json

- 3. In the json file, change "USE_CUSTOM_THEME": false to "USE_CUSTOM_THEME": true
- 4. Also change "THEME_NAME": "" to "THEME_NAME": "default"
- 5. Save the file, using CTRL O.
- 6. Close the file using CTRL X.
- 7. Become the edxapp user, by executing the following line:

sudo su edxapp -s /bin/bash

8. Execute the following lines:

cd \sim

source edxapp_env

9. Create a directory for the theme and then download the Stanford theme from github into that directory:

mkdir themes

cd themes

git clone https://github.com/Stanford-Online/edx-theme.git default

10. Recompile the edX assets:

cd /edx/app/edxapp/edx-platform

paver update_assets lms - -settings=aws

NB. The above command has two "-" in front of settings, with no space between the two dashes.

Upon successfully completing the above steps, you will see the Stanford Theme upon restarting the web server.

CHAPTER 12

Indices and tables

- genindex
- modindex
- search