|  |  |  |
| --- | --- | --- |
|  |  | GoTAFE – Moodle administration  Policies and Procedures |

Greg Bird 01.09.16

Moodle ‘Course’ naming convention 2

Single unit of competency (Preferred) 2

Clustered Competency 3

Whole of qualification (Student Induction) 3

Extension to naming convention 3

Moodle Categories (hierarchy) 4

Hierarchy 4

Roles and Permissions 5

Rollover Strategy 7

Strategy 7

Copy Processes 7

Backup, Archive and Offline Storage 8

System level backups 8

In-system Course Archives (hidden category) 9

Automated Course Backup (requires approval from eWorks) 9

Bulk Course and User Processes, via CSV 10

Modify existing course (format, category completion etc.) 10

Rename existing courses 10

# Moodle ‘Course’ naming convention

For the purposes of GoTAFE, a Moodle course is used to contain:

* A single Unit of Competency
* A cluster of similar units, that are co-delivered and co-assessed
* A whole of qualification information resource

Note: Wherever possible, Moodle courses should be created to match a single unit. Clustered competencies and ‘whole of qualification’ courses create issues with tracking, reporting, auditing, enrolment and student results.  
  
Naming should be applied to BOTH ‘Course full name’ AND ‘Course short name’

## Single unit of competency (Preferred)

#### UNIT CODE: Unit Title (*[Audience, ]*Year)

Audience is optional and can be used to denote:

* Dept (eg Wine)
* Study or enrolment pattern (RPL)
* External Client (Ardmona)
* External Cohort (VETiS, VCAL)
* Location (Seymour)
* Internationals (Offshore, Onshore)

If the course is “In Development”, the first two digits of the year are changed to ID (eg. ID16)

### Examples:

* HLTEN511B: Provide nursing care for clients requiring palliative care (2016)
* AHCHBR203A: Provide daily care for horses (VETIS, 2016)
* SITXMPR501: Obtain and manage sponsorship (Hosp, 2016)
* BSBWOR502A: Ensure Team Effectiveness (ID16)   
  *(‘In development’ example)*

## Clustered Competency

#### UNIT CODE 1 | UNIT CODE 2 | UNIT CODE 3: Cluster Title(*[Audience, ]*Year)

Wherever possible, clustering should be reserved to a small number of units that are delivered and assessed holistically. Each unit of the cluster should be listed, in alphabetical order. Unit codes are separated by “ | “ *(space pipe space)*

### Example:

* AHCWRK502A | AHCWRK503A: Reports & Data Cluster 1 (Wine, ID17)

## Whole of qualification (Student Induction)

#### QUALIFICATION CODE: Qualification Title - Student Induction (*[Audience, ]*Year)

‘Whole of Qualification’ courses should be reserved for student induction and course related resources. They **should not** be used for delivery, assessment or evidence of participation as this cannot be tracked back to the units of competency.

### Example:

* BSB51415: Diploma of Project Management – Student Induction (2016)

## Extension to naming convention

Names must be unique throughout Moodle. There may be occasions where the naming convention is too limiting, particularly regarding the ‘audience’. Where there is more than one intended audience, it is recommended that all are included, separated by “-“

For example:

* A unit that is taught across two campuses:  
  BSBWOR502A: Ensure Team Effectiveness (Seymour-Benalla, 2016)
* The same unit that is taught by two departments, as VETiS delivery:  
  BSBWOR502A: Ensure Team Effectiveness (IT-VETiS, 2016)  
  BSBWOR502A: Ensure Team Effectiveness (Sport-VETiS, 2016)

# Moodle Categories (hierarchy)

Categories should clearly identify current delivery and align with organisational hierarchies. This is important for reporting and to align with other GOTAFE systems.

Lower is a proposed category hierarchy for review, and potential implementation for 2017 delivery

## Hierarchy

* Year
  + Division
    - Department code: Department title
      * Qualification Code: Qualification Title
        + *UNIT CODE: Unit Title ([Audience, ]Year)  
          (Specific Moodle course)*

### Example (for 2017 implementation)

* 2017
  + RAMI
    - Hospitality
      * AHC51513: Diploma of Viticulture
        + BSBWOR502A: Ensure Team Effectiveness (Viticulture, 2017)   
          (Specific Moodle course)
* 2016   
  *(Can be made hidden, early in 2017)*
  + RAMI
    - Hospitality
      * AHC51513: Diploma of Viticulture
        + BSBWOR502A: Ensure Team Effectiveness (Viticulture, 2016)
* ARCHIVE   
  *(Courses identified for backup and deletion)*

# Roles and Permissions

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Role** | **Description** | **Base role (archtype)** | **Applied at?**  **(context)** | **Manually Enrol users?** | **Edit course settings?** | **Edit course content?** | **Communi-cate with students?\*** | **Grade students?** | **Receive notific-ations?** | **View hidden content?** |
| [**Provider Administrator (High Level)**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=8) | Highest level of Moodle administration at GoTAFE | Manager | System | **Yes.**  All users. | **Yes** | **Yes** | **Yes** | **Yes** | **Limited** assignment submissions, but not quizzes or feedback | **Yes** |
| [**Division Administrator**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=28) | Can create users and courses, access and modify them, but do not participate in courses. | Manager | Category | **Yes. G**OTAFE Trainer + GOTAFE Trainer Assistant | **No** | **Yes** | **Yes** | **Limited** Cannot grade assignments but can grade other tools | **Limited** assignment submissions, but not quizzes or feedback | **Yes** |
| [**Trainer and Developer**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=3) | Trainer & Developer can do anything within a course, including changing the activities and grading students. | Teacher (editing) | Category, Course | **No** | **Limited** show/hide, appearance, themes etc. | **Yes** | **Yes** | **Yes** | **Yes** | **Yes** |
| **[Contracted Developer](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=34)** | Same as Trainer and Developer. Can do anything within a course except access Alfresco. Access must be removed prior to student accesss | Teacher (editing) | Category, Course | **No** | **Limited** show/hide, appearance, themes etc. | **Yes** | **Yes** | **Yes** | **Yes** | **Yes** |
| [**GOTAFE Trainer**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=4) | Can teach in courses and grade students, but may not alter activities. | Teacher (non-editing) | Course | **No** | **No** | **No** | **Yes** | **Yes** | **Limited** assignment submissions, but not quizzes | **Yes** |
| [**NGT Trainer**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=22) | Non-GOTAFE trainers can teach in courses and grade students, but may not alter activities. | Teacher (non-editing) | Course | **No** | **No** | **No** | **Yes** | **Yes** | **Limited** assignment submissions, but not quizzes | **Limited**  Can view hidden activities and chapters, but not sections |
| [**GOTAFE Trainer Assistant**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=14) | Similar to GOTAFE Trainer but without Gradebook access | Teacher (non-editing) | Course |  | **No** | **No** | **Yes** | **Limited** Cannot grade assignments or quizzes, but can grade other tools. Cannot view grades | **Limited** assignment submissions, but not quizzes or feedback | **Limited**  Can view hidden activities and chapters, but not sections |
| [**GOTAFE Learner**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=5) | A learner who has been enrolled into a GOTAFE course on the GOTAFE Student Management System. | Student | Course | **No** | **No** | **No** | **Yes** | **No** | **Yes** | **No** |
| [**NGT Learner**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=20) | Learners who will not be enrolled into a GOTAFE course but are under approved partnership provider or contract agreements. | Student | Course | **No** | **No** | **No** | **Yes** | **No** | **Yes** | **No** |
| [**Course Evaluator**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=26) | Used to enable access at a category level for GOTAFE Staff to all shells within. | Authentic-ated user | Category, Course | **No** | **No** | **No** | **No** | **No** | **No** | **Yes** |
| [**Employer Report**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=35) | To be used for allowing employers to access their apprentice and provide report | None | User, Course | **No** | **No** | **No** | **No** | **No** | **No** | **No** |
| [**Study support role**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=36) | To be used for allowing Study support staff to access their students grades | None | User | **No** | **No** | **No** | **No** | **No** | **No** | **No** |
| [**Guest**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=6) | Guests have minimal privileges and usually cannot enter text anywhere. | Guest | Category, Course | **No** | **No** | **No** | **No** | **No** | **No** | **No** |
| [**Course creator**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=2) | Course creators can create new courses and teach in them. | Course creator | Course | **No** | **No** | **No** | **No** | **No** | **No** | **No** |
| [**Authenticated user**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=7) | All logged in users. | None | None | **No** | **No** | **No** | **No** | **No** | **No** | **No** |
| [**Manager**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=1) | Managers can access course and modify them, they usually do not participate in courses. | Manager | System, Category, Course | **Yes** | **Yes** | **Yes** | **Yes** | **Yes** | **Limited** assignment submissions, but not quizzes or feedback | **No** |
| [**Provider Administrator**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=9) | Provider Administrators can create new courses and teach in them. | Course creator | Category, Course | **Yes.**  All user types expect for PA (High Level) | **No** | **No** | **No** | **No** | **No** | **No** |
| [**Parent**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=10) | To be used for allowing parents to access their childs activities | None | None | **No** | **No** | **No** | **No** | **No** | **No** | **No** |
| [**Manager Access**](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=24) | Applied at a category level to enable for GOTAFE Managers to view all courses within that category. | Student | Category, Course | **No** | **No** | **No** | **Yes** | **Limited** Cannot add or edit grades but can view grades | **No** | **Yes** |
| **[Resource review](http://gotafe.trainingvc.com.au/admin/roles/define.php?action=view&roleid=30)** | Has minimal privileges. This role enables guest to view quiz questions | Guest | Category, Course | **No** | **No** | **No** | **No** | **No** | **No** | **Limited**  Can view hidden activities but not sections or chapters |

# Rollover Strategy

Periodically, a Moodle course will need to be rolled over, in preparation for a new student intake. This traditionally happens at the end of a Semester or Year, but can happen throughout the year in line with enrolment processes.

It is important to retain a full working copy of the previous delivery round, for auditing and archival purposes

## Strategy

1. Ensure that the existing course is properly named, in accordance with the established naming convention. Change the short and full name if necessary  
   *Eg AHCHBR203A: Provide daily care for horses (VETIS, 2016)*
2. Make a copy of this course via one of the mechanisms described below. DO NOT include student data  
   *Eg AHCHBR203A: Provide daily care for horses (VETIS, 2017)*
3. *(OPTIONAL)* If the original course is no longer in active delivery, set the course as hidden:  
   Edit settings > Visible = Hide

## Copy Processes

### Individually, via backup:

1. Perform a full course backup of the existing course. This will ensure data security, in the event of accident or failure
   1. *Course Administration > Backup (then perform backup using default settings)*
2. Restore this newly created backup to a new course
   1. *Course Administration > Restore*
   2. Choose the restore option adjacent to the newly created backup
   3. Select “Restore as a new course”
   4. Search for and select the appropriate category, then click Continue
   5. **Untick** “Include enrolled users”, then click next
   6. Give the new course an appropriate short and full name  
      *eg AHCHBR203A: Provide daily care for horses (VETIS, 2017)*
   7. Continue through the restoration process as per usual
3. Enrol the appropriate teaching staff in the new copy

### In bulk, via CSV

Bulk course copies can be performed using the “Upload courses” feature, fully described here:

<https://docs.moodle.org/29/en/Upload_courses>

1. Prepare a CSV file in line with the following

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **templatecourse** | **shortname** | **fullname** | **category** | **format** |
| *Short name of existing Moodle course to be copied* | *Short name of new Moodle course. Should match the fullname* | *Short name of new Moodle course. Should match the shortname* | *\* Category ID number.* | *Format of template Moodle site, as established through Jaspersoft* |
| AHCHBR203A: Provide daily care for horses (VETIS, 2016) | AHCHBR203A: Provide daily care for horses (VETIS, 2017) | AHCHBR203A: Provide daily care for horses (VETIS, 2017) | 123 | onetopic |

*\* The Category ID number is found by navigating to the required Moodle category and then copying the number from the URL  
EG. http://gotafe.trainingvc.com.au/course/index.php?categoryid=****123***

1. Follow the instructions as shown in this screen recording:  
   <https://www.youtube.com/watch?v=Mkssu6sVUDg>

# Backup, Archive and Offline Storage

To establish a schedule for that allows for regular, automated course level backups. To develop an archive policy whereby courses from the previous year’s delivery are maintained in the system, for reporting and auditing. To backup old and redundant courses to alternative storage.

## System level backups

This statement, from the “TVC STANDARD OPERATION ENVIRONMENT AND CAPABILITY SPECIFICATIONS” summarises the backup and disaster recovery schedule.

*‘eWorks maintains a comprehensive backup and data recovery strategy for software and configuration directory(s), file stores and databases. Education technology consists of a number of components which are can be fully backed up and restored in case of hardware or software failure.*

*A daily backup regime is maintained for all data systems in production-level use with regular tests of backup restoration processes and data. System backups are performed on the fly without shutting down any system components, using existing database and filestore backup tools. Where the databases references a filestore, both are backed up. eWorks runs on-disk backups followed by offline storage to tape with appropriate rotation measures for maximum recovery speed and flexibility, providing for a maximum of 24 hours data loss. eWorks runs daily & weekly backups and is used for system backup of the servers for the Issuing, CRL and OCSP components of the certificate service. Off-site backup media is maintained.’*

## In-system Course Archives (hidden category)

The recommendation regarding course hierarchies would establish a protocol whereby the previous years’ worth of delivery is maintained in the system, but be hidden from student view, though hidden categories. This allows for quick recovery of courses for re-use, as well as reporting and auditing of previous delivery

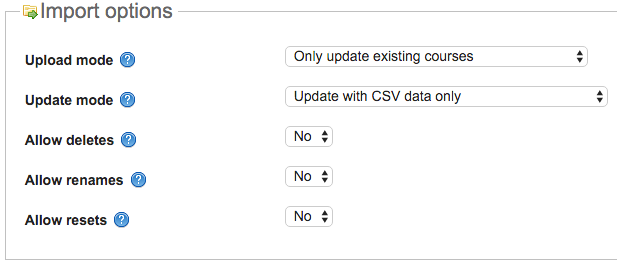
## Automated Course Backup (requires approval from eWorks)

A protocol exists for automated course backups. Advice from eWorks is that we **NOT** turn this on for fear of performance and stability. This decision should be reviewed on a regular basis, through consultation with eWorks.

# Bulk Course and User Processes, via CSV

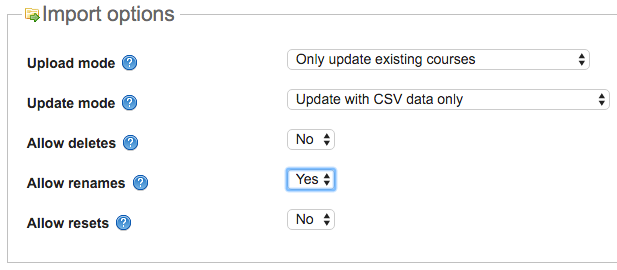
## Modify existing course (format, category completion etc.)

|  |  |  |  |
| --- | --- | --- | --- |
| shortname | category | enablecompletion | format |
| ABC123: Existing Site (2016) | 5 | 1 | tiles |

1. Prepare a CSV file in the above format, or use the template available in the [eLearning Support](http://gotafe.trainingvc.com.au/course/view.php?id=4591&section=14) course
2. Upload to [Upload Courses](http://gotafe.trainingvc.com.au/admin/tool/uploadcourse/index.php)
3. Choose the settings as shown in the screencapture

## Rename existing courses

|  |  |  |
| --- | --- | --- |
| shortname | rename | fullname |
| ABC123: Current name | ABC123: New name (2016) | ABC123: New name (2016) |

1. Prepare a CSV file in the above format, or use the template available in the [eLearning Support](http://gotafe.trainingvc.com.au/course/view.php?id=4591&section=14) course
2. Upload to [Upload Courses](http://gotafe.trainingvc.com.au/admin/tool/uploadcourse/index.php)
3. Choose the settings as shown in the screencapture