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Adding Courses2

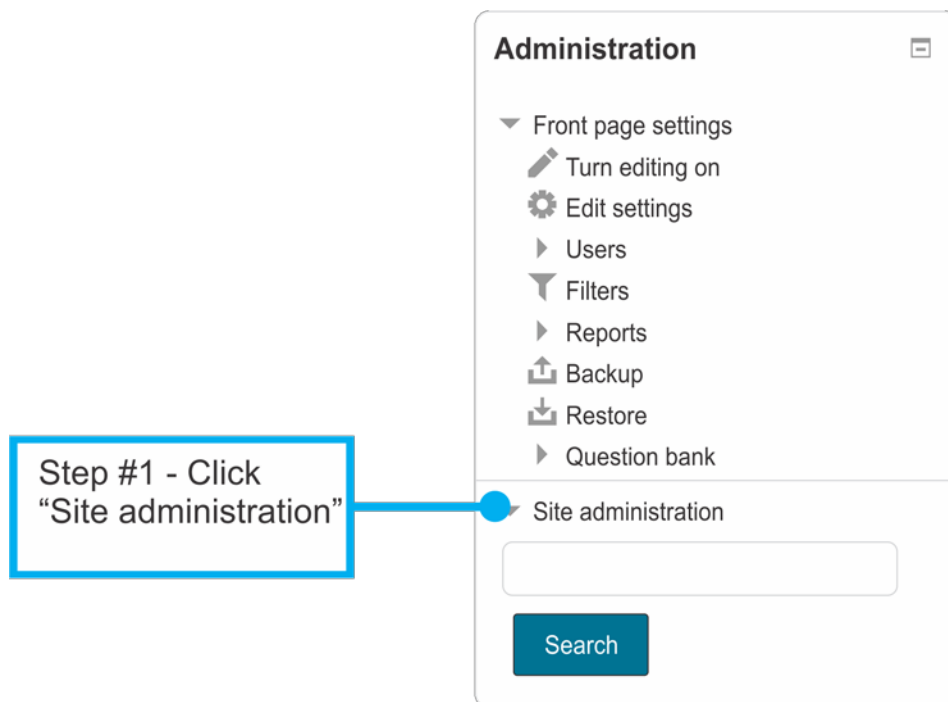


The Mobius Learning Getting Started guide helps you create classes, find content, and access data. This guide will give you an overview of the Learning Platform so you can quickly be up and running in no time.

Adding Courses

The Administrator is responsible for setting up a course and assigning the teacher as an “Editing Teacher”. This is an easy task as described in the following steps after you have logged into the LMS:

Locate the Administration “Block” on the “Home” screen, which will be located either in the right or left navigation panel. These can be on either side of the screen and depends on what the preferences were when the LMS was setup.





Getting Started Guide

Administrators Guide - Add a new course



Step #2 - Click
"Courses"

Administration

▼ Front page settings

✎ Turn editing on

⚙ Edit settings

▸ Users

▼ Filters

▸ Reports

📁 Backup

📁 Restore

▸ Question bank

▼ Site administration

⚙ Notifications

⚙ Registration

⚙ Advanced features

▸ Users

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▸ Grades

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▸ Location

▸ Languages

▸ Plugins

▸ Security

▸ Appearance

▸ Front page

▸ Server

▸ Reports

▸ Development

▸ Assignment upgrade helper

Search



Step #3 - Click
“Manage courses
and categories”

Administration

▼ Front page settings

✎ Turn editing on

⚙ Edit settings

▶ Users

▼ Filters

▶ Reports

📁 Backup

📁 Restore

▶ Question bank

▼ Site administration

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⚙ Manage courses and categories

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Getting Started Guide

Administrators Guide - Add a new course

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Course and category management

Viewing: Course categories and courses

Course categories

Create new category

☒ Miscellaneous

Sorting

Selected categories

Sort by Category name ascending

Sort by Course full name ascending

Sort

Move selected categories to

Choose...

Move

Miscellaneous

Create new course

Sort courses | Per page: 50

Step #4 - Click "Miscellaneous" category (or you can also create a new category) and then click on "Create new course"



Getting Started Guide

Administrators Guide - Add a new course

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Step #5 is covered in the next several pages of this document. It is taken from the next screen in the process and there are many options. We will explain each option, which may or may not apply to your specific needs.

Add a new course [Expand all](#)

▼ General

Course full name * ?

Course short name * ?

Course category ?

Visible ?

Course start date ?

Course ID number ?

The first thing to do on this page is to click the “Expand all” tabs in the top right hand corner. This will expand the accordions for this entire page. That is how we will show and explain all of the options available for this screen.

1. Enter the course full name
2. Enter the course short name: The short name of the course is displayed in the navigation and is used in the subject line of course email messages.
3. Enter the category: This can be in the “Miscellaneous” category or another category you have created.
4. Visible: As you are building a course, it is sometimes a decision to “Hide” the course. To make it available to students, it will be necessary to unhide the course.
5. Course start date: This defines when you want the course to be available to students and is definable.



Getting Started Guide

Administrators Guide - Add a new course

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6. **Course ID number:** The ID number of a course is only used when matching the course against external systems and is not displayed anywhere on the site. If the course has an official code name it may be entered, otherwise the field can be left blank.



▼ Course format

Format ⓘ Topics Format ▼

Number of sections 10 ▼

Hidden sections ⓘ Hidden sections are shown in collapsed form ▼

Course layout ⓘ Show all sections on one page ▼

▼ Appearance

Force language Do not force ▼

News items to show ⓘ 0 ▼

Show gradebook to students ⓘ Yes ▼

Show activity reports ⓘ No ▼

Course format:

Format –

The course format determines the layout of the course page.

- Single activity format - For displaying a single activity or resource (such as a Quiz or SCORM package) on the course page
- Social format - A forum is displayed on the course page
- Topics format - The course page is organized into topic sections
- Weekly format - The course page is organized into weekly sections, with the first week starting on the course start date

Number of sections –

The numbers of sections are like chapters or some logical breaks in a course.



Hidden sections -

This setting determines whether hidden sections are displayed to students in collapsed form (perhaps for a course in weekly format to indicate holidays) or are completely hidden.

Course layout -

This setting determines whether the whole course is displayed on one page or split over several pages.

Appearance:

Force language -

This defaults to "Do not force". There may be times that an instructor may want a specific language displayed and would want to force to only display a specific language.

New items to show -

This setting determines how many recent items appear in the latest news block on the course page. If set to "0 news items" then the latest news block will not be displayed.

Show gradebook to students -

Many activities in the course allow grades to be set. This setting determines whether a student can view a list of all their grades for the course via a grades link in the course administration block.

Show activity reports -

Activity reports are available for each participant that show their activity in the course. As well as listings of their contributions, such as forum posts or assignment submissions, these reports also include access logs. This setting determines whether a student can view their own activity reports via their profile page.



▼ Files and uploads

Maximum upload size ?

Site upload limit (128 MB) ▼

▼ Completion tracking

Enable completion tracking ?

Yes ▼

▼ Guest access

Allow guest access ?

Yes ▼

Password ?

Unmask

▼ Groups

Group mode ?

Yes ▼

Force group mode ?

No ▼

Default grouping

None ▼

Files and uploads:

Files and uploads –

This setting determines the largest size of file that can be uploaded to the course, limited by the site-wide setting set by an administrator. Activity modules also include a maximum upload size setting for further restricting the file size.

Completion tracking:

Completion tracking –

If enabled, activity completion conditions may be set in the activity settings and/or course completion conditions may be set.



Getting Started Guide

Administrators Guide - Add a new course

Guest access:

Allow guest access -

This setting determines whether a user can access the course as a guest, without being required to enroll.

Password -

A password allows guest access to the course to be restricted to only those who know the password. Guests will be required to supply the password each time they access the course.

Groups

Group mode:

This setting has 3 options:

- No groups - There are no sub groups, everyone is part of one big community
- Separate groups - Each group member can only see their own group, others are invisible
- Visible groups - Each group member works in their own group, but can also see other groups

The group mode defined at course level is the default mode for all activities within the course. Each activity that supports groups can also define its own group mode, though if the group mode is forced at course level, the group mode setting for each activity is ignored.

Force group mode -

If group mode is forced, then the course group mode is applied to every activity in the course. Group mode settings in each activity are then ignored.

Default grouping -



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Administrators Guide - Add a new course

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Once some groupings have been created, a default grouping for course activities and resources may be set.



Getting Started Guide

Administrators Guide - Add a new course

▼ Role renaming

?

Your word for 'Manager'

Your word for 'Course Creator'

Your word for 'Teacher'

Your word for 'Non-editing teacher'

Your word for 'Student'

Your word for 'Guest'

Your word for 'Authenticated user'

Your word for 'Authenticated user
on front page'

Your word for 'Parent'

Role renaming

This setting allows the displayed names for roles used in the course to be changed. Only the displayed name is changed - role permissions are not affected. New role names will appear on the course participants page and elsewhere within the course. If the renamed role is one that the administrator has selected as a course manager role, then the new role name will also appear as part of the course listings.

After making all of the selections and filling in the course information, save the course. You have now completed the course setup. The next step is for an Instructor to add content to the course.



Getting Started Guide

Administrators Guide - Add/Edit a Teacher

Contents

Assigning an Editing Teacher (Instructor).....2



Getting Started Guide

Administrators Guide - Add/Edit a Teacher

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Assigning an Editing Teacher (Instructor)

To assign an Editing Teacher, the person to be assigned must first be registered as a user in the LMS. If the person to be assigned has not been registered as a user, the Administrator must first make that authorization.

If the person being assigned as an Editing Teacher is already registered, the following method is used.

Step #1 - Click
"Site administration"

Administration

▼ Front page settings

✎ Turn editing on

⚙ Edit settings

▶ Users

▼ Filters

▶ Reports

📁 Backup

📄 Restore

▶ Question bank

Site administration

Search



Getting Started Guide

Administrators Guide - Add/Edit a Teacher

Step #2 - Click
"Courses"

Administration

▼ Front page settings

✎ Turn editing on

⚙ Edit settings

▸ Users

▾ Filters

▸ Reports

📁 Backup

📁 Restore

▸ Question bank

▼ Site administration

⚙ Notifications

⚙ Registration

⚙ Advanced features

▸ Users

▸ Courses

▸ Grades

▸ Badges

▸ Location

▸ Languages

▸ Plugins

▸ Security

▸ Appearance

▸ Front page

▸ Server

▸ Reports

▸ Development

▸ Assignment upgrade helper

Search



Course and category management

Viewing: Course categories and courses

Course categories

Create new category

☒ Miscellaneous

0

Sorting

Selected categories

Sort by Category name ascending

Sort by Course full name ascending

Sort

Move selected categories to

Choose... Move

Miscellaneous

Create new course | Sort courses | Per page: 50

+ ☒ Mathematics - Basic Edition

Step #3 - Choose the “Category” and “Course” you want to assign an “Editing Teacher”

Move selected courses to...

Choose... Move



Course and category management

Viewing: Course categories and courses ▾

Course categories

Create new category

☒ **Miscellaneous**    1 

Sorting

Selected categories ▾

Sort by Category name ascending ▾

Sort by Course full name ascending ▾

Sort

Move selected categories to

Choose... ▾ Move

Move selected courses to...

Choose... ▾ Move

Miscellaneous

Create new course | Sort courses ▾ | Per page: 50 ▾

+ ☒ **Mathematics - Basic Edition**     

Mathematics - Basic Edition

View | Edit | Enrolled users | Delete | Hide | Backup |

Step #4 - Choose to “View” the course as indicated.



Getting Started Guide

Administrators Guide - Add/Edit a Teacher

Page | 6

Step #5 - Choose "Users". Notice that although the block is titled "Administration", this is the course "Administration".

Administration

▼ Course administration

✎ Turn editing on

⚙ Edit settings

⚙ Course completion

▶ Users

▼ Filters

▶ Reports

Search

Step #6 - Choose "Enrollment methods"

Administration

▼ Course administration

✎ Turn editing on

⚙ Edit settings

⚙ Course completion

▼ Users

👤 Enrolled Users

▶ Enrollment methods

▶ Groups

▶ Permissions

👤 Other users

▼ Filters

▶ Reports

Search



Getting Started Guide

Administrators Guide - Add/Edit a Teacher

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Mathematics - Basic Edition

Enrollment Methods

Step #7 - Choose the icon circled in yellow (Enroll users)

Name	Users	Up/Down	Edit
Manual enrollments	↓	ⓘ ⓘ ⓘ	ⓘ ⓘ ⓘ
Guest access	↑ ↓	ⓘ ⓘ	
Self enrollment (Student)	↑	ⓘ ⓘ ⓘ	

Add method

Mathematics - Basic Edition

Manual enrollments

The screenshot shows the 'Manual enrollments' interface. On the left, under 'Enrolled users (0)', there is an 'Add' button (circled in yellow and labeled #3) and an 'Assign role' dropdown menu (labeled #1). The dropdown menu is open, showing options: Student, None, Manager, Teacher, Non-editing teacher, and Student. The 'Teacher' option is highlighted. Below the dropdown is a 'Starting from' date selector set to 'Today (12/30/2015)'. On the right, under 'Not enrolled users (1)', there is a list of users, including 'Your Editing Teacher (teacher@yourinstitution.com)' (labeled #2). At the bottom left, there is a 'Search' input field and a 'Clear' button. At the bottom right, there is another 'Search' input field.

Step #8 - Choose the drop down menu under "Assign role" and select "Teacher". Select the teacher in the right box you want to assign to the course. Then click the "Add" button. Verify the assignment in the left box.



Mathematics - Basic Edition

Manual enrollments

Enrolled users

Enrolled users (1)
Your Editing Teacher (teacher@yourinstitution.com)

Search

Search

◀ Add

Assign role
Student ▼

Enrollment duration
Unlimited ▼

Starting from
Today (12/30/2015) ▼

Remove ▶

Not enrolled users

Not enrolled users (0)

Search

Clear

Notice that you have assigned an Editing Teacher for the Mathematics - Basic Edition course in the “Enrolled users” in the left box. You have now completed the assignment of an “Editing Teacher” for a course.



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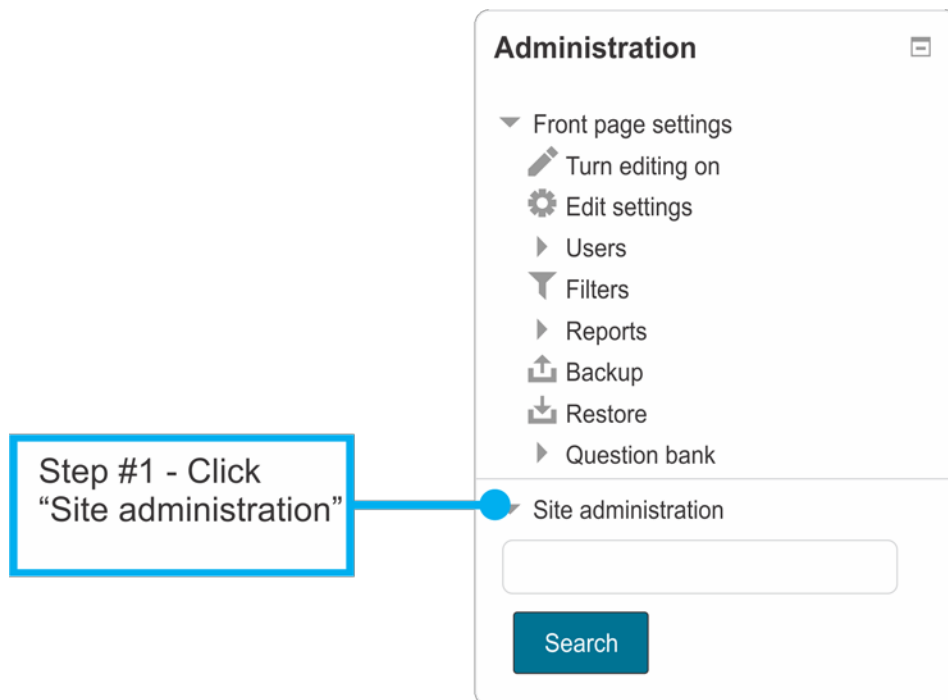
Administrators Guide - Duplicating a Course

The Mobius Learning Getting Started guide helps you create classes, find content, and access data. This guide will give you an overview of the Learning Platform so you can quickly be up and running in no time.

Duplicating Courses

The Administrator is responsible for replicating/duplicating a course and assigning the teacher as an “Editing Teacher”. This is an easy task as described in the following steps after you have logged into the LMS:

Locate the Administration “Block” on the “Home” screen, which will be located either in the right or left navigation panel. These can be on either side of the screen and depends on what the preferences were when the LMS was setup.





Step #2 - Click
"Courses"

Administration

▼ Front page settings

✎ Turn editing on

⚙ Edit settings

▶ Users

▼ Filters

▶ Reports

📁 Backup

📁 Restore

▶ Question bank

▼ Site administration

⚙ Notifications

⚙ Registration

⚙ Advanced features

▶ Users

▶ Courses

▶ Grades

▶ Badges

▶ Location

▶ Languages

▶ Plugins

▶ Security

▶ Appearance

▶ Front page

▶ Server

▶ Reports

▶ Development

▶ Assignment upgrade helper

Search








Getting Started Guide

Administrators Guide - Duplicating a Course










Step #3 - Click
"Manage courses
and categories"

Administration

▼ Front page settings

-  Turn editing on
-  Edit settings
 - Users
-  Filters
 - Reports
-  Backup
-  Restore
 - Question bank

▼ Site administration

-  Notifications
-  Registration
-  Advanced features
 - Users
- ▼ Courses
 -  Manage courses and categories
 -  Add category
 -  Restore course
 -  Course default settings
 -  Course requests
 - Backups
 -  Upload courses
- Grades
- Badges
- Location
- Languages
- Plugins
- Security
- Appearance
- Front page
- Server
- Reports
- Development
- Assignment upgrade helper



Course category management

Viewing: Course categories and courses ▾

Course categories

Create new category

■ Masters	👁️ ⬇️ ⚙️ ▾	0 🔄
■ Masters CATEGORY 1	👁️ ⬆️ ⬇️ ⚙️ ▾	3 🔄
■ Masters CATEGORY 2	👁️ ⬆️ ⬇️ ⚙️ ▾	6 🔄

Sorting

Selected categories ▾

Sort by Category name ascending ▾

Sort by Course full name ascending ▾

Sort

Choose... ▾

Move

Masters

Create new course | Sort courses ▾ | Per page: 20 ▾

⊕ ■ Anatomy Physiology 1	⚙️ ✕ 👁️
⊕ ■ Anatomy Physiology 2	⚙️ ✕ 👁️
⊕ ■ Chemistry	⚙️ ✕ 👁️

Move selected course to...

Choose...

Move

Step #4 - Click the category where the course you want to duplicate is located. In this example we will use the "Masters CATEGORY 1".



Course category management

Viewing: Course categories and courses -

Course categories

Create new category

■ Masters	👁️ ⬇️ ⚙️	0 🔄
■ Masters CATEGORY 1	👁️ ⬆️ ⬇️ ⚙️	3 🔄
■ Masters CATEGORY 2	👁️ ⬆️ ⬇️ ⚙️	6 🔄

Sorting

Selected categories ▾

Sort by Category name ascending ▾

Sort by Course full name ascending ▾

Sort

Choose...

Move

Masters

Create new course | Sort courses ▾ | Per page: 20 ▾

⊕ ■ Anatomy Physiology 1	⚙️ ✕ 👁️
⊕ ■ Anatomy Physiology 2	⚙️ ✕ 👁️
⊕ ■ Chemistry	⚙️ ✕ 👁️

Move selected course to...

Choose...

Move

Step #5 - Click the course you want to duplicate/copy.

Step #5 is covered in the next several pages of this document. It is taken from the next screen in the process and there are many options. We will explain each option, which may or may not apply to your specific needs.

Add a new course

► Expand all

General

Course full name * ?

Course short name * ?

Course category ?

Miscellaneous ▾

Visible ?

Hide ▾

Course start date ?

1 ▾ January ▾ 2016 ▾ 📅

Course ID number ?



Getting Started Guide

Administrators Guide - Duplicating a Course

The first thing to do on this page is to click the “Expand all” tabs in the top right hand corner. This will expand the accordions for this entire page. That is how we will show and explain all of the options available for this screen.

1. Enter the course full name
2. Enter the course short name: The short name of the course is displayed in the navigation and is used in the subject line of course email messages.
3. Enter the category: This can be in the “Miscellaneous” category or another category you have created.
4. Visible: As you are building a course, it is sometimes a decision to “Hide” the course. To make it available to students, it will be necessary to unhide the course.
5. Course start date: This defines when you want the course to be available to students and is definable.
6. Course ID number: The ID number of a course is only used when matching the course against external systems and is not displayed anywhere on the site. If the course has an official code name it may be entered, otherwise the field can be left blank.



▼ Description

[Course summary](#)

The course summary is displayed in the list of course searches as the course summary text in addition to course names.

Course summary files

Maximum size for new files: Unlimited, maximum attachments: 1

Course summary files, such as images, are displayed in the list of courses together with the summary.

You can drag and drop files here to add them.



▼ Course format

Format ?

Topics Format ▼

Number of sections

10 ▼

Hidden sections ?

Hidden sections are shown in collapsed form ▼

Course layout ?

Show all sections on one page ▼

▼ Appearance

Force language

Do not force ▼

News items to show ?

0 ▼

Show gradebook to students ?

Yes ▼

Show activity reports ?

No ▼

Course format:

Format –

The course format determines the layout of the course page.

- **Single activity format** - For displaying a single activity or resource (such as a Quiz or SCORM package) on the course page
- **Social format** - A forum is displayed on the course page
- **Topics format** - The course page is organized into topic sections
- **Weekly format** - The course page is organized into weekly sections, with the first week starting on the course start date

Number of sections –

The numbers of sections are like chapters or some logical breaks in a course.



Hidden sections –

This setting determines whether hidden sections are displayed to students in collapsed form (perhaps for a course in weekly format to indicate holidays) or are completely hidden.

Course layout –

This setting determines whether the whole course is displayed on one page or split over several pages.

Appearance:

Force language –

This defaults to “Do not force”. There may be times that an instructor may want a specific language displayed and would want to force to only display a specific language.

New items to show –

This setting determines how many recent items appear in the latest news block on the course page. If set to “0 news items” then the latest news block will not be displayed.

Show gradebook to students –

Many activities in the course allow grades to be set. This setting determines whether a student can view a list of all their grades for the course via a grades link in the course administration block.

Show activity reports –

Activity reports are available for each participant that show their activity in the course. As well as listings of their contributions, such as forum posts or assignment submissions, these reports also include access logs. This setting determines whether a student can view their own activity reports via their profile page.



▼ Files and uploads

Maximum upload size ⓘ Site upload limit (128 MB) ▼

▼ Completion tracking

Enable completion tracking ⓘ Yes ▼

▼ Guest access

Allow guest access ⓘ Yes ▼

Password ⓘ ☐ Unmask

▼ Groups

Group mode ⓘ Yes ▼

Force group mode ⓘ No ▼

Default grouping ⓘ None ▼

Files and uploads:

Files and uploads –

This setting determines the largest size of file that can be uploaded to the course, limited by the site-wide setting set by an administrator. Activity modules also include a maximum upload size setting for further restricting the file size.

Completion tracking:

Completion tracking –

If enabled, activity completion conditions may be set in the activity settings and/or course completion conditions may be set.



Guest access:

Allow guest access -

This setting determines whether a user can access the course as a guest, without being required to enroll.

Password -

A password allows guest access to the course to be restricted to only those who know the password. Guests will be required to supply the password each time they access the course.

Groups

Group mode:

This setting has 3 options:

- No groups - There are no sub groups, everyone is part of one big community
- Separate groups - Each group member can only see their own group, others are invisible
- Visible groups - Each group member works in their own group, but can also see other groups

The group mode defined at course level is the default mode for all activities within the course. Each activity that supports groups can also define its own group mode, though if the group mode is forced at course level, the group mode setting for each activity is ignored.

Force group mode -

If group mode is forced, then the course group mode is applied to every activity in the course. Group mode settings in each activity are then ignored.

Default grouping -

Once some groupings have been created, a default grouping for course activities and resources may be set.



▼ Role renaming

?

Your word for 'Manager'

Your word for 'Course Creator'

Your word for 'Teacher'

Your word for 'Non-editing teacher'

Your word for 'Student'

Your word for 'Guest'

Your word for 'Authenticated user'

Your word for 'Authenticated user
on front page'

Your word for 'Parent'

Role renaming

This setting allows the displayed names for roles used in the course to be changed. Only the displayed name is changed - role permissions are not affected. New role names will appear on the course participants page and elsewhere within the course. If the renamed role is one that the administrator has selected as a course manager role, then the new role name will also appear as part of the course listings.

After making all of the selections and filling in the course information, save the course. You have now completed the course setup. The next step is for an Instructor to add content to the course.



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Deleting accounts	28
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Administrators Guide - Upload Users into Moodle

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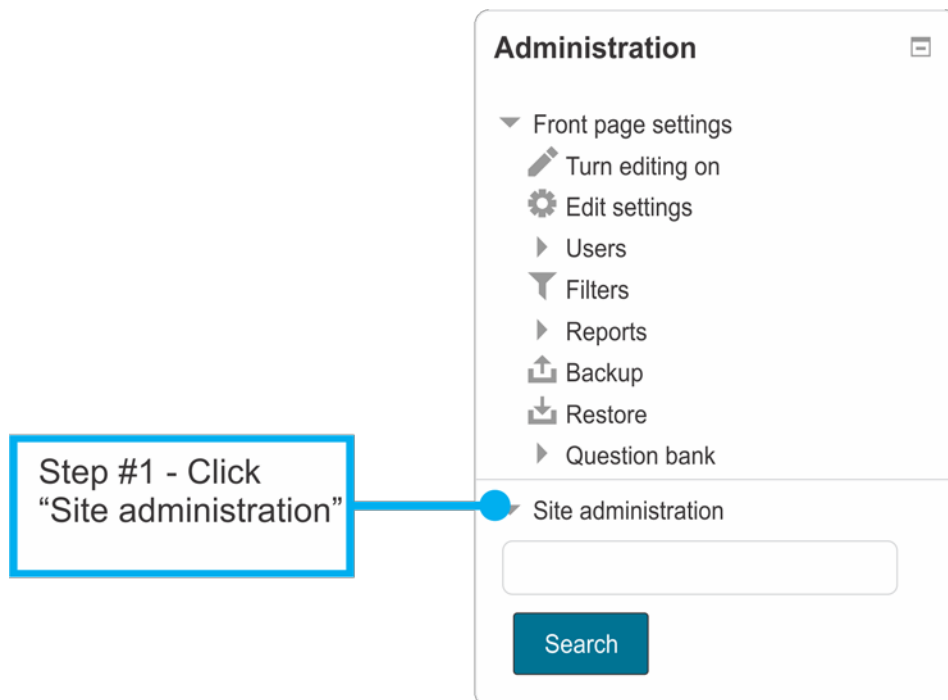
The Mobius Learning Getting Started guide helps you enroll users in the LMS. This guide will give you an overview of the Learning Platform so you can quickly be up and running in no time.

Enrolling Users in the LMS

The Administrator, in most cases, is responsible for the enrollment of users in the LMS. That includes Managers, Teachers, and Students. In this guide, we will describe a couple of popular methods, but be aware that there are several methods that will work.

Manual Method to Enroll Users in the LMS

Locate the Administration “Block” on the “Home” screen, which will be located either in the right or left navigation panel. These can be on either side of the screen and depends on what the preferences were when the LMS was setup.





Getting Started Guide

Administrators Guide - Upload Users into Moodle

Step #2 - Click
"Users"

Administration

▼ Front page settings

✎ Turn editing on

⚙ Edit settings

▶ Users

▼ Filters

▶ Reports

📁 Backup

📁 Restore

▶ Question bank

▼ Site administration

⚙ Notifications

⚙ Registration

⚙ Advanced features

▶ Users

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▶ Grades

▶ Badges

▶ Location

▶ Languages

▶ Plugins

▶ Security

▶ Appearance

▶ Front page



Getting Started Guide

Administrators Guide - Upload Users into Moodle

Step #3 - Click
"Accounts" and
"Add a new user"

Administration

▼ Front page settings

✎ Turn editing on

⚙ Edit settings

▸ Users

▼ Filters

▸ Reports

📁 Backup

📂 Restore

▸ Question bank

▼ Site administration

⚙ Notifications

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⚙ Advanced features

▸ Users

▼ Accounts

⚙ Browse list of users

⚙ Bulk user actions

⚙ Add a new user

⚙ User default preferences

⚙ User profile fields

⚙ Cohorts

⚙ Upload users

⚙ Upload user pictures



Getting Started Guide

Administrators Guide - Upload Users into Moodle

Step #4 is covered in the next several pages of this guide. It describes the information you will enter when manually setting up a new user in the LMS.

The screenshot shows the 'General' section of the Moodle user creation form. It includes fields for Username, authentication method (set to 'Manual accounts'), a checkbox for 'Suspended account', a checkbox for 'Generate password and notify user', a 'New password' field with an 'Unmask' checkbox, a checkbox for 'Force password change', and fields for 'First name' and 'Last name'. Red numbered circles (1-8) are placed to the left of the form elements to indicate the sequence of steps: 1) Username field, 2) Authentication method dropdown, 3) Suspended account checkbox, 4) Generate password checkbox, 5) New password field, 6) Force password change checkbox, 7) First name field, and 8) Last name field. A 'Expand all' link is visible in the top right corner.

- 1) First enter a user name. A typical practice is to use the first initial and full last name. Note that this must be all lower case letters.
- 2) If you have no additional authentication methods for your LMS (i.e. Single-Sign-On), this should be left as “Manual accounts”, which is the default.
- 3) You don’t need to do anything here, but you should note that latter if you want to suspend a user, you can come back to this page and click the “Suspend account”. This will stop the user from accessing the LMS, but will keep their user information including grades.
- 4) “Generate password and notify user” is the preferred method of providing a new user with information regarding their access to the LMS. This will also eliminate the Administrator for sending them an email, because the system sends one automatically if this box is checked.
- 5) If you do not check the previous box, you can manually set a password for a user. In creating a new user, you would then need to send the user their login information (URL, User Name, and Password).



Getting Started Guide

Administrators Guide - Upload Users into Moodle

- 6) “Force password change” is a good box to check. This requires the new user to enter a new password when they log in to the LMS the next time they login to the LMS.
- 7) “First name” is simply the first name of the new user. The system uses this in multiple places, so this is important information.
- 8) “Last name” is simply the last name of the new user. The system uses this in multiple places, so this is important information.

The screenshot shows a Moodle user profile form with the following fields and annotations:

- 9** Email address* (text input field)
- 10** Email display (dropdown menu with "Allow only other course members to see my email address" selected)
- 11** City/town (text input field)
- 12** Select a country (dropdown menu with "Select a country..." selected)
- 13** Timezone (dropdown menu with "Server timezone (America/New_York)" selected)
- 14** Description (rich text editor with a toolbar and a large text area)

- 9) “Email address” is the users email address and is very important for the system. All communication from the LMS is via. Email, so this information is used from everything from password resets, to a teacher communicating with a user.
- 10) “Email display” has a default to “Allow only other course members to see my email address”. This can be set to “Hide my email address from everyone” or “Allow everyone to see my email address”.
- 11) “City/Town” is information that is optional.
- 12) “Select a country” is information that is optional.
- 13) “Timezone” can be set for a user and is optional.
- 14) “Description” is information about the user and will be displayed on their profile page. This is optional.



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The screenshot shows the 'User picture' section of the Moodle user creation form. It includes a 'Current picture' field with 'None' selected, a 'Delete' button, and a 'New picture' section with a file upload interface. Below the upload area is a 'Picture description' text box, followed by expandable sections for 'Additional names', 'Interests', and 'Optional' information. At the bottom is a 'Create user' button. Red numbered circles (15-20) are placed to the left of the form elements to indicate specific steps or features.

15 Current picture
None

16 Delete

17 New picture ?
Maximum size for new files: 225MB, maximum attachments: 1
Files
You can drag and drop files here to add them.

18 Picture description

19 Additional names
Interests
Optional

20 Create user

- 15) This indicates if the user has a “Current picture”. For a new user there will be no picture indicated.
- 16) “Delete” is used here to only delete the users picture.
- 17) “New picture” is where you can drag and drop a new users picture and is optional.
- 18) “Picture description” can be any name you assign to the picture and is optional.
- 19) “Additional names”, “Interests”, and “Optional” is all information that can be included for a user description and is all optional.
- 20) “Create user” is the last step in manually creating a user. When you click this button and have completed all of the required items as indicated by the “*” (asterisk) beside the description of each item, the user will be created in the LMS and they will have access based on the information entered.



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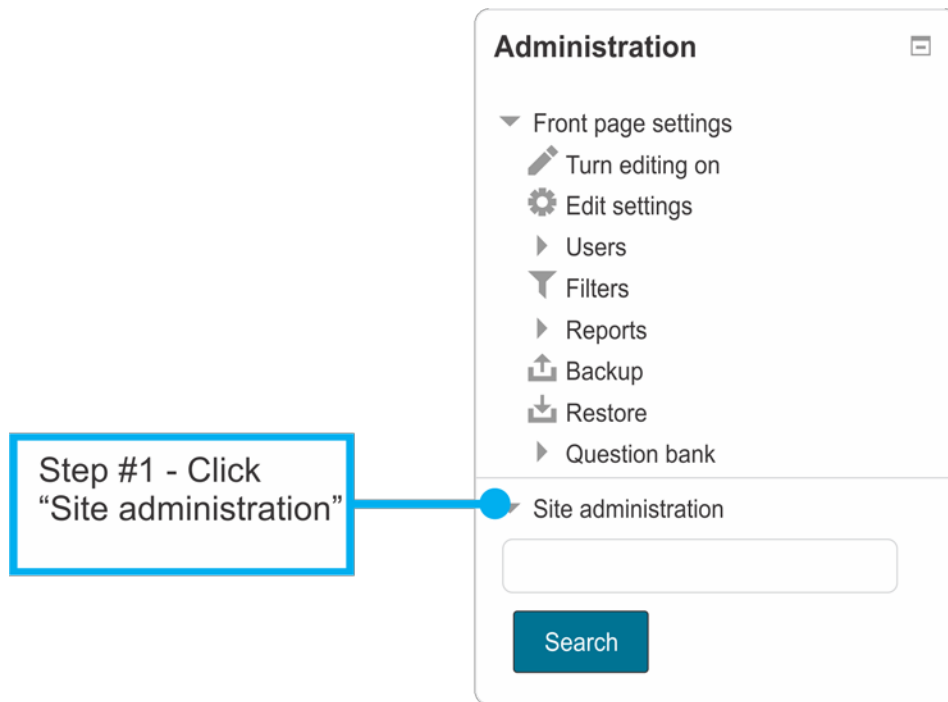
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Upload Users

If you have multiple users to upload at one time, this method is useful. You will want to pay close attention to the instructions, because if done incorrectly will result in users not being loaded in the LMS.

Locate the Administration “Block” on the “Home” screen, which will be located either in the right or left navigation panel. These can be on either side of the screen and depends on what the preferences were when the LMS was setup.





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Step #2 - Click
"Users"

Administration

▼ Front page settings

✎ Turn editing on

⚙ Edit settings

▸ Users

▼ Filters

▸ Reports

📁 Backup

📁 Restore

▸ Question bank

▼ Site administration

⚙ Notifications

⚙ Registration

⚙ Advanced features

▸ Users

▸ Courses

▸ Grades

▸ Badges

▸ Location

▸ Languages

▸ Plugins

▸ Security

▸ Appearance

▸ Front page



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Step #3 - Click
"Accounts" and
"Upload users"

Administration

▼ Front page settings

✎ Turn editing on

⚙ Edit settings

▸ Users

▼ Filters

▸ Reports

📁 Backup

📁 Restore

▸ Question bank

▼ Site administration

⚙ Notifications

⚙ Registration

⚙ Advanced features

▸ Users

▼ Accounts

⚙ Browse list of users

⚙ Bulk user actions

⚙ Add a new user

⚙ User default preferences

⚙ User profile fields

⚙ Cohorts

⚙ Upload users

⚙ Upload user pictures



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The screenshot shows the 'Upload users' form in Moodle. It includes a 'File*' field with a 'Choose a file...' button and a note 'Maximum size for new files: 225MB'. Below this is a large dashed box with a blue arrow pointing down and the text 'You can drag and drop files here to add them.' (Annotation 1). Further down are three dropdown menus: 'CSV delimiter' (Annotation 2), 'Encoding' set to 'UTF-8' (Annotation 3), and 'Preview rows' set to '10' (Annotation 4). At the bottom is an 'Upload users' button (Annotation 5). A footer note states 'There are required fields in this form marked *.'

- 1) After you have setup your .csv file, drag the file to this upload area. You must make sure the .csv file is formatted correctly or the users will not be uploaded. We will explain that process latter in this guide.
- 2) You can define what type of .csv file you are uploading. The default is “comma” delimited, which is a typical file type. If you are using Excel to develop the file, make sure to save it as a “comma” delimited file type.
- 3) The typical encoding is UTF-8, but you can change the encoding to the file type you are using.
- 4) “Preview rows” allows you to see how the .csv file is interpreted by the LMS. It is always a good idea to take a careful look at this preview before proceeding. This setting defines the number of rows that will be viewable.
- 5) “Upload Users” button is the final step in preparing the file for upload.



Preparing a .csv File for Uploading

This step in uploading users is the most important to prepare the .csv file correctly. In this step, we are describing the use of Microsoft Excel to develop the file and then we will save it as a comma delimited .csv file.

You will need at a minimum the following information about each user must be upload:

- Username
- User First Name
- User Last Name
- User Email Address

File formats for upload users file

The upload users file has fields separated by a comma (or other delimiter) **ONLY** - no space. The first line contains the valid field names. The rest of the lines (records) contain information about each user.

Tip: Avoid special characters in field information like quotes or other commas. Test a file with only one record before a large upload.

Tip: You can use a spread sheet program to create the file with the required columns and fields. Then save the file as "CSV (comma delimited)". These files can be opened with simple text editors for verification.

Valid upload file for testing

Here is an example of a simple valid upload file: (Column headers on the first line of the file are only highlighted in bold in this example to distinguish it from the rest of the of the data/user details)

```
username,password,firstname,lastname,email,course1,group1,cohort1
jonest,verysecret,Tom,Jones,jonest@someplace.edu,math102,Section 1,year
3
reznort,somesecret,Trent,Reznor,reznort@someplace.edu,math102,Section
3,year 4
```



Fields that can be included

Tip: We strongly recommend that you test a file that contains fields you proposed to use with one user before attempting a file upload for the first time.

- Required fields:
username,firstname,lastname,e
mail



Validity checks are performed for:

1. username can only contain alphabetical lowercase letters , numbers, hyphen '-', underscore '_', period '.', or at-sign '@'
 2. email is in the form: name@example.com .
- **Password field:** "password" field is optional if "Create password if needed" setting is chosen (default).
 - If included, values should meet the requirements for the site's Password policy. To force password change for a particular user, set the password field to changeme.
 - If omitted, a password will be generated for each user (during the next Cron job) and welcome e-mails sent out.
 - **Optional fields:** To provide values other than the default include one or more of these
institution,department,city,country,lang,auth,timezone,idnumber,icq,phone1,phone2,address,url,description,mailformat,maildisplay,htmleditor,autosubscribe
 - Additional name fields
 - Country- use a country TWO LETTER CODE
 - The auth field must be used if the site uses an alternative authentication method, such as LDAP, as otherwise the authentication method will default to manual and users using a different auth method won't be able to log in.
 - Some fields have a maximum number of characters that are allowed (notably institution should be at most 40 characters long). See hints below.
 - Maildisplay, htmleditor and autosubscribe can be set from an import screen.
 - Custom profile field names: (Optional). xxxxx is the real custom user profile field name (i.e. the unique shortname)
profile_field_xxx
xx

Create the custom fields BEFORE importing. Use the standard header. The "shortname" for your custom field is xxxxx (NB the shortname must be all lowercase, otherwise won't be recognized). The first record must include "profile_field_xxxxx".

Example: To create a custom field "genre", you must write a shortname "genre" in the new field, and write "profile_field_genre" in the header of the .csv file.



For custom profile fields that are a menu, use the corresponding value.

For custom profile fields that are dates, use the ISO standard format YYYY-MM-DD, eg. 2014-06-19 which will then be properly localized in the interfaced.

Example: A custom field 'Department' with one of three values 'HR', 'Marketing' or 'Training'. Just insert one of those three words (e.g. 'Training') as the value for that field.

- Special fields: Used for changing of usernames or deleting of users
oldusername, deleted, suspended

- Enrolment fields: (Optional):

course1,type1,role1,group1,enrolperiod1,enrolstatus1,course2,type2,role2,group2,enrolperiod2,enrolstatus2 etc.

- Header fields must have a numeric suffix such that type1, role1, group1, enrolperiod1 and enrolstatus1 all apply to course1 for course1 to course n .
- course is the "shortname" of the course, if present the user will be enrolled in that course.
- type sets the role to be used for the enrolment. A value of 1 is default course role, 2 is legacy Teacher role and 3 is legacy Non-editing Teacher.
- role may be used to specify roles directly, using either role short name or id (numeric names of roles are not supported).
- group may be used to assign users to groups in course, using name or id (numeric group names are not supported)
- enrolperiod may be used to set the enrolment duration, in days, for each course.
- enrolstatus can suspend users from a course when set to 1 or left blank for enrolled.

- Cohort field: (Optional):

cohort1

Internal cohort id numbers or non-numeric Cohort IDs of existing cohorts must be used; names are not allowed.

- mnethostid (Optional)

Existing MNetusers can be added to courses, groups or cohorts as below:



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1. enrolling to courses: username+mnethostid+course required
2. adding to group: username+mnethostid+course+group required
3. adding to cohort: username+mnethostid+cohort required
4. suspending/reviving accounts: username+mnethostid+suspended required

All other operations are ignored. You can not add users, delete them or update them (such as change names or email, profile fields, etc.)



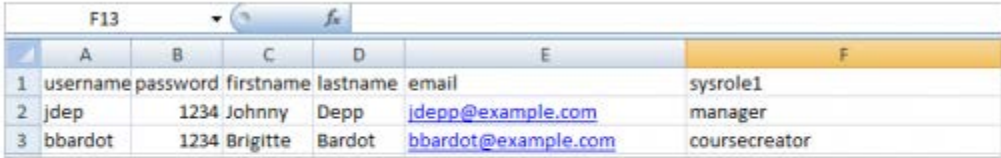
- System role (Optional)

sysrole1,sysrole2,sysrole3
etc

Users may be uploaded to a system role (usually Manager or Course creator) by entering the shortname of that role. Other roles can only be uploaded if they have already been assigned in the 'system' context. See Creating custom roles. Multiple roles can be assigned using sysrole2, sysrole3, etc. fields. Note that the number suffix in no way relates to the number suffixes on the enrolment fields. The numbers must go up in sequence starting at 1.

- Unassigning roles

Users can also be removed from a given system role by entering the shortname of that role prefixed with a minus symbol: '-'. If the user is currently assigned to that role, they are removed from it. If the user is not currently assigned to that system role, the field value is ignored. However, the field value must refer to a system role that does exist on the system, otherwise an error will occur.



	A	B	C	D	E	F
1	username	password	firstname	lastname	email	sysrole1
2	jdep	1234	Johnny	Depp	jdepp@example.com	manager
3	bbardot	1234	Brigitte	Bardot	bbardot@example.com	coursecreator

Example of a file for uploading users with global/system roles

Commas within a field must be encoded as , - the script will decode these back to commas.

For Boolean fields, use 0 for false and 1 for true.

To prevent users from receiving a large number of emails from courses or forced subscription forums use the **maildigest**. The options for this field are 0 = No digest, 1 = Complete digest and 2 = Digest with just subjects.



Upload user process

1. Create file for uploading
2. Go to Site administration > Users > Accounts > Upload users
3. Add file to upload
4. Upload users preview - check settings and default user profile settings
5. Upload users preview - click "Upload users"
6. Upload users results - shows list of users, exceptions made in upload and summary of number of users
7. Upload users results - click "Continue"
8. Returns to Upload users screen

Updating users preview

There are various settings to better control the desired upload behaviour. These settings are found on the "Upload users preview" page.

Warning: errors updating existing accounts can affect your users badly. Be careful when using the options to update.

Upload type

The Upload type specifies how to handle existing accounts.

Add new only, skip existing users

is the default Moodle upload type. It creates a new user account for each new record in the uploaded file. If an existing username is found (i.e., the username in the uploaded file matches an existing username, that record is **skipped**. By skipping the existing user account, the data in the existing record is not touched (in contrast to the "Add new and update existing users" option) and a second new user account is **not** created (in contrast to the "Add all, append number to usernames if needed" option).

Add all, append number to usernames if needed

creates a new user account for each record in the uploaded file. If an existing user account is found, a new account will be created with a number appended to the username. For example, if a user account for username 'jsmith' already exists and a new record in the uploaded file contains a record for username 'jsmith' an additional user account is created with a 1 appended to the username to produce user 'jsmith1'.

Add new and update existing users



creates a new user account for each new user in the upload file. If an existing user account with the same username is found, the account information is updated by the data in the uploaded file.

Update existing users only

ignores any new users found in the upload file and updates the user account if a matching username record is found in the uploaded file.

New user password

When creating a new user account Moodle can create a new password (if one is not provided) or require a password in the uploaded file.

Create password if needed

creates a default password for the new user account if one is not provided in the uploaded file.

Field required in file

requires that a password be provided in the uploaded file in order. If a password is not provided, an error is generated and the user account is not created.

Existing user details

The Existing user details options are only available when the Upload type allows existing user accounts to be updated. It specifies how Moodle should process user detail information for existing users.

No changes

ignores user detail data in the uploaded and leaves the existing user account data unchanged.

Override with file

overwrites data in the existing user account with the data provided in the uploaded file.

Override with file and defaults

overwrites data in the existing user account with data provided in the uploaded file and fills in the default values for existing user details when no data is provided in the uploaded file.



Fill in missing from file and defaults

adds data in the existing user account with data provided in the uploaded file if the field is empty (does not already contain data) and fills in the default values for existing user details when no data is provided in the uploaded file.



Existing user password

The Existing user password option specifies how to handle password data for existing user accounts when Existing user details is set to overwrite data.

No changes

ignores password field in the uploaded user file and leaves the existing user account password untouched

Update

overwrites the existing user account password with the password provided in the uploaded file

Force password change

The Force password change option specifies when to tag a user account so that the next login attempt will require the user to change the user's password.

Users having a weak password

If the user account has a weak password as defined by the site's Password policy then the user will be forced to change the password during the next login attempt. This option is not shown if there the site does not have a Password policy, in other words \$CFG->passwordpolicy must be set to see this option.

None

None of the users in the uploaded file will be forced to change the password during the user's next login attempt.

All

All of the users in the uploaded file will be forced to change the password during the user's next login attempt.

Allow renames

If the uploaded file contains the special oldusername field, it is possible to rename a user from the oldusername to a new username. The default setting is to not allow renames. Keep in mind that renaming a user will require the user to use the new username when logging in.

No



ignores the oldusername field and leaves the existing user account's username field unchanged.

Yes

allows the existing user account's username to be changed by the data provided in the uploaded file's username field. The oldusername will be searched for and then updated with the data provided in the username column.

Allow deletes

If the uploaded file contains the deleted special field, it is possible to use the upload file to delete existing user accounts. The default setting is to **not** allow deletes. Keep in mind that deleting a user account will prevent that user from logging in. As a protection, site administrator user accounts cannot be deleted with this method.

No

ignores the deleted special field in the uploaded file and leaves the existing user account unchanged

Yes

allows the existing user account to be deleted when the value of the of the deleted field is 1.

Allow suspending and activating of accounts

If the uploaded file contains the suspended special field, it is possible to use the upload file to either suspend or make active (unsuspend) existing user accounts. The default setting is to allow suspending/activating of existing user accounts. Keep in mind that suspending an existing user account will prevent that user from logging in.

Yes

allows the existing user account to be suspended when the value of the of the suspended field is 1.

No

ignores the suspended special field in the uploaded file and leaves the existing user account status unchanged.



Prevent email address duplicates

It is possible, but **not** recommended to upload users with duplicate email addresses. By default, uploading users with duplicate email addresses is prevented.

To allow duplicate email addresses, go to Site administration ► Plugins ► Authentication ► Manage authentication. You can tick "Allow accounts with same email". Then on the upload users screen you will be allowed to change the "Prevent email address duplicates" setting. However, doing this is not recommended. For more info, see the Managing authentication docs page

Yes

prevents user accounts from being created from the uploaded if an existing user account already has the same email address as found in the uploaded file's email column.

No

allows user accounts to be created if an existing user account already has the same email address found in the uploaded file's email column.

Standardize usernames

Standardize usernames is used by default to convert the username to all lower case and to strip out illegal characters. It is possible to not standardize the usernames; however, doing so is not recommended.

Yes

standardizes usernames found in the uploaded file before updating existing or creating new user accounts so that the username contains only lowercase letters and numbers.

No

skips standardizing usernames found in the uploaded file so that the newly created or updated usernames will be exactly as they are in the uploaded file (not recommended).

For those seeking a more technical explanation, the process for standardizing the usernames consists of ensuring the characters are all UTF-8 (fix_utf8) encoded, converting the username to lower case, and then stripping out non-letters/non-number



characters (unless \$CFG->extendedusernamechars is set to true) with something similar to:

```
$username = preg_replace('/[^\.\@\_a-z0-9]/', '',  
$username);
```

Select for bulk user actions

After the uploaded file has finished being processed (all new accounts have been created and existing accounts updated as specified by the previous settings), there is an option to select some of those user accounts to perform additional bulk user actions such as

- Confirm user accounts created through Email-based self-registration which are not yet confirmed by the user
- Send a message (requires Messaging to be enabled)
- Delete user accounts
- Display a list of users on a page
- Download user data in text, ODS or Excel file format
- Force users to change their passwords
- Add users to a cohort

By default, no users are selected for bulk user actions.

No

No users are selected for bulk user actions

New users

Only newly created users are selected for bulk user actions

Updated users

Only updated user accounts are selected for bulk user actions

All users

All users found (existing updated users and newly created user accounts) in the uploaded file are selected for bulk user actions

Default values

You can provide default user values for some fields not included in the uploaded file. Some fields include:



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- Email display
- Forum auto-subscribe
- City/town
- ID number
- Institution
- Department

Upload user results

After accepting the preview settings by clicking on "Upload users", you should see the the Upload users results screen.



This screen will show you any exceptions or changes that were made to each user in the upload process. For example if you were updating user information, the updated information will be shown. Or if a user was not added that record will be highlighted.

The screen will summarize how many users were uploaded or updated, indicate the number of weak passwords and the number of errors.

Advanced potentials of Upload user

Templates

Note: This section needs checking and updating if necessary for Moodle 2.0. Please do so and remove this note when finished.

The default values are processed as templates in which the following codes are allowed:

- %l - will be replaced by the lastname
- %f - will be replaced by the firstname
- %u - will be replaced by the username



- %% - will be replaced by the %

Between the percent sign (%) and any code letter (l, f or u) the following modifiers are allowed:

- (-) minus sign - the information specified by the code letter will be converted to lowercase
- (+) plus sign - the information specified by the code letter will be converted to UPPERCASE
- (~) tilde sign - the information specified by the code letter will be converted to Title Case
- a decimal number - the information specified by the code letter will be truncated to that many characters



For example, if the firstname is John and the lastname is Doe, the following values will be obtained with the specified templates:

- %l%f = DoeJohn
- %l%1f = DoeJ
- %-l%+f = doeJOHN
- %-f_%-l = john_doe
- http://www.example.com/~%u/ results in http://www.example.com/~jdoe/ (if the username is jdoe or %-1f%-l)

Template processing is done only on default values, and not on the values retrieved from the CSV file.

In order to create correct Moodle usernames, the username is always converted to lowercase. Moreover, if the "Allow extended characters in usernames" option in the Site policies page is off, characters different to letters, digits, dash (-) and dot (.) are removed. For example if the firstname is John Jr. and the lastname is Doe, the username %-f_%-l will produce john jr._doe when Allow extended characters in usernames is on, and johnjr.doe when off.

When the "New username duplicate handling" setting is set to Append counter, an auto-increment counter will be append to duplicate usernames produced by the template. For example, if the CSV file contains the users named John Doe, Jane Doe and Jenny Doe without explicit usernames, the default username is %-1f%-l and New username duplicate handling is set to Append counter, then the usernames produced will be jdoe, jdoe2 and jdoe3.

Deleting accounts

If the deleted field is present, users with value 1 for it will be deleted. In this case, all the fields may be omitted, except for username. After uploading the file, be sure to change the "Upload type" to "Update existing users only" and the "Allow deletes" option to "Yes".

Tip: A similar field is available for suspended. This enables a user account to be temporarily disabled rather than completely removed.

Deleting and uploading accounts could be done with a single CSV file. For example, the following file will add the user Tom Jones and delete the user reznort:

```
username,firstname,lastname,deleted
```




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jonest,Tom,Jones,0

reznort,,,1



Encoding file format

On the initial Upload user screen, you may select the file encoding format from a pull down list. These include UTF-8 (the default), ASCII, ISO-8859-1 to ISO-8859-11 or any one of over 36 formats.

Hints

Spreadsheet

If you use a spreadsheet program such as Excel to create your .csv file, check the resulting output in a text editor before you upload it. It is possible to get trailing commas on each line from an empty field if you have added and deleted columns of information prior to saving the final file. Also check the character encoding. A csv file is a simple text file (ASCII or Unicode) that can be used to upload user accounts.

Excel translates passwords that begin with - (minus) or + (plus) as zero. Even when saving as .csv and saying "Yes" to "Keep this format, and leave out any incompatible features." Check for this before uploading, as a zero halts the upload process.

If you use a formula in Excel to create fields (for example, the concatenate function to create a user name), then remember to copy the cells with the formula and use special paste with values checked to make them into an acceptable data for a csv file.

The upload will also fail if you have trailing spaces at the end of your data fields. Often, this can not be removed with a simple Find " " and Replace with "". If information has been copied from web sources than it is possible to include non-breaking spaces which will prevent your upload from being completed correctly. To find these invisible spaces, use the Find and Replace function in Excel. In the find field, hold alt and type 0160. Leave the replace field blank.

Country

The country should be written as a two letter code, in capitals. For example, use BE for Belgium or NL for the Netherlands. Using "be" or "nl" or "USA" as a country code will result in a database error.

Tip: If you are having trouble working out the two-letter code for a country, you can consult the list of country names and code elements available on the ISO Website. A common error is to use UK for United Kingdom; it should be GB.

Field size limits



Some fields have maximum character lengths. Typically the file will import to the preview list screen but not finish the process. Turn on debug to see the fields that are too long. Common fields to cause problems are "Institution" which is limited to 40 characters, and "City", also limited (20 characters). The error will be "User not added - error".

Time zones

The entry is case sensitive so Europe/London will work but europe/london will not.

All fields listed here

All the fields that are valid are listed below, except for any custom fields you may have created.

firstname, lastname, username, email, city, country, lang, timezone, mailformat, maildisplay, maildigest, htmleditor, ajax, autosubscribe, institution, department, idnumber, skype, msn, aim, yahoo, icq, phone1, phone2, address, url, description, descriptionformat, password, auth, oldusername, deleted, suspended, course1, course2, course3, course4

Enroll users to Cohorts (system groups)

You can enroll users to any Cohort (system level group) by using only the "username" and the "Cohort ID". Here is a sample CSV file:

```
username,cohort1
teacher1,system-
teachers
teacher2,system-
teachers
teacher3,system-
teachers
```

Make sure you set "Upload type" to "Update existing users only" (So you are not asked to add firstname, lastname and email fields too)