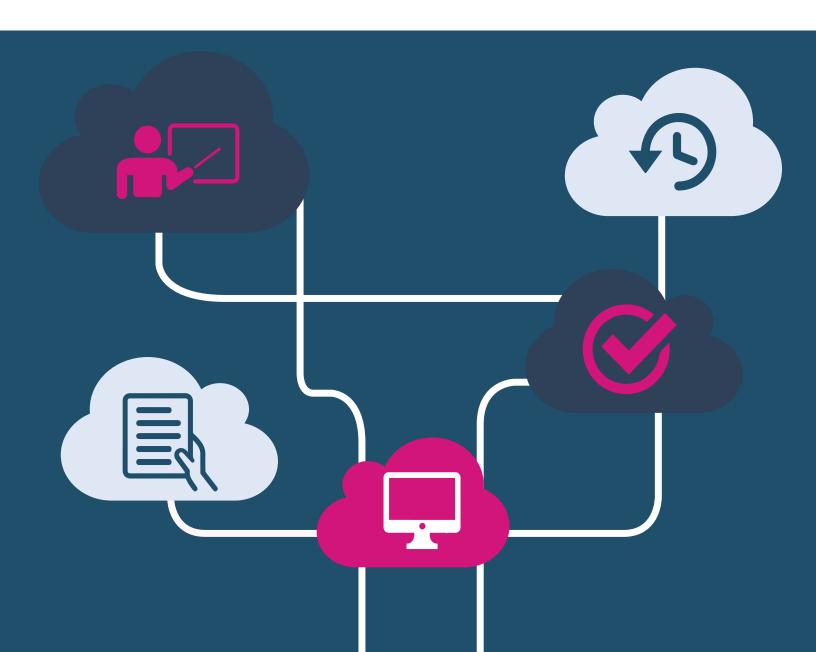




MOODLE INSTALLATION GUIDE PLANNING FOR SUCCESS + SITE CONFIGURATION



WHAT'S INSIDE

3 INTRODUCTION

4
THE PLANNING PROCESS

5 COURSE CREATION

6 COURSE MANAGEMENT

8
SITE CONFIGURATION

9 COURSE ENROLLMENT

10
USER & SITE POLICIES

11
DEFAULT COURSE SETTINGS

14
APPEARANCE SETTINGS

15
SETUP BEST PRACTICES
AND RECOMMENDATIONS



INTRODUCTION

Here's the scenario: You are about to setup your first Moodle installation, and you aren't sure where to start, what to consider, or what you should know. The good news is if you are outsourcing your Moodle hosting – which is the recommended method – the Moodle installation process will be taken care of for you. Moodle hosting vendors, like Lambda Solutions, help take away the headache of installing the site on a server, and remove stress about optimizing performance. Regardless of whether you have outsourced hosting or not, it's best to have a good understanding about what is involved in the Moodle process. This guide is a compilation of step by step directions, best practices, and tips designed to assist users who are about to install their first Moodle site, but it also provides great background information if you are a more experienced Moodle user.

THIS GUIDE WILL COVER THE PLANNING PROCESS OF YOUR MOODLE INSTALLATION, AS WELL AS PROVIDE STEPS TO FOLLOW DURING COURSE CREATION, COURSE MANAGEMENT, AND SITE CONFIGURATION.

TERMS YOU SHOULD FAMILIARIZE YOURSELF WITH:

These are words that will be commonly used not only throughout this guide, but during your installation as well.

· Blended Learning

Online content and instructor led sessions

Self-paced or Independent Learning

The course and all of its materials are online

Synchronous activities

Activities that have to be completed during a set time-frame and could include involvement with other learners (group work)

Asynchronous activities

Activities that can be completed anytime and anywhere

Open enrollment

Learners start and finish the course at different times

Communication Channels

Different types of message outputs that can be used to communicate such as email and/or popup window notifications when logged in

Standard Plugin

Module or program that provides a feature and extended functionality and is included as part of Moodle out of the box.

Contributed or Community Plugin

Module or program that provides a feature and extended functionality, and has to be installed in Moodle



THE PLANNING PROCESS

Before getting into the meat of this Guide, there are a few different things that you need to consider before installing your Moodle site. Understanding the learning needs of your organization is crucial, as this can shape the way Moodle is setup to reach your business goals. The questions below can be used to help with identifying the requirements of your setup. Often the answers to these questions will determine how courses are setup, and how your site will operate.



Q: Who is your learning audience?

Your learners will likely fall in one of three categories: Internal team members, clients, or partners. The category that your learners belong to will play a big role in deciding what kind of training they will need, and who will manage them.

If your learners are internal team members, the list of users is likely already known, and will be managed by an administrator.

Courses will focus on products, processes, and certifications required to perform a job.

If your learners are clients, courses can focus on products, or they can be related to different topics specifically related to your business such as safety, language, business, or licenses. With clients, the list of learners can sometimes be known, but if you have new clients sign up frequently, they will most likely be unfamiliar.

If your learners are partners, courses can be formatted in any of the two ways listed above, either product, or topic, depending on learning objectives. .With partners, your learners will most likely be known, save for any new partners you might obtain during the learning process

Q: What will the delivery style of your courses be?

You can format courses to be fully self-paced with no instructor involvement, or you can take a blended learning approach, with a combination of online material and

A blended learning approach, or a self-paced learning approach is recommended if your learners are geographically scattered (i.e. not in one place), or if they have unconventional schedules. An instructor led course is usually chosen if learners can easily be gathered in one space.

Q: Do you have some ideas around how learner accounts will be created?

For example integration with an existing system (LDAP, HR, SIS) or database, use of a file upload containing a list of user accounts, or self-based user account creation. You should brainstorm a few options beforehand



COURSE CREATION

There are a few best practices to follow when it comes to creating Moodle courses. Here are some things to consider.

Keep students engaged by having activity based courses (with assignments, and quizzes), or socially based (with forums, chats, and wiki's). Sticking to only one delivery method can cause boredom, but changing up the delivery method keeps the mind stimulated.

Set clear expectations for your courses from the beginning. This could be the expectation for how long each learner is expected to spend in each course, technical expectations, expectations for the course format, or expectations for how you will communicate in the course. Knowing your expectations allows you to better measure the outcome.

Be sure to ask questions that force learners to apply the principles they are being taught.

Provide examples whenever possible.

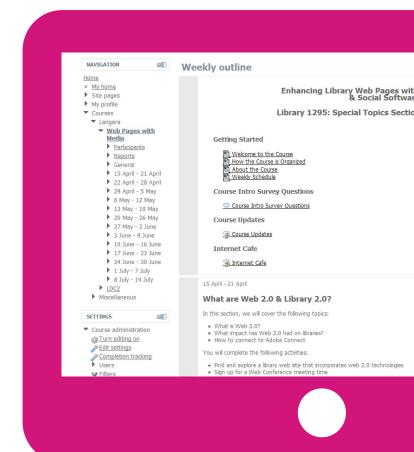
When determining which activities to include, look at 3–5 activities and learning resources, and try to imagine how they can be used, and for what purpose. Our Top 5 Picks for Activities are Page and Book Learning Resource, Label, Forum, Quiz, and Choice Activity. We will go through each of these more in depth

Page and Book Learning Resource

Both of these learning resources allow instructors to build content right within Moodle. What's even better is that they can do this without having to know HTML, thanks to the handy Text-editor, which functions a lot like any word processing program. In addition, developed content can contain text, as well as rich media, such as images, audio, and video to really engage learners. The benefits of the "Book" over the "Page" are that the book can contain multiple pages, as opposed to just one.

Label

Labels are great for creating structure and hierarchy in your course, while also providing instructions to learning right in the top layer of the course. To the right, you can see an example of a course using the Label to provide instruction, and create structure on the course page.



Forum

Students learn best by creating, talking, writing, analyzing, and explaining. For these reasons, the forums can be a strong communication tool used to discuss and explain concepts used in the course, while also acting as a catalyst for thinking and learning. An example of a forum we will share with you is the QA forum, where students can first answer questions posed by an instructor before seeing how other students have responded. This fosters independent thinking, while also utilizing the power of social learning.

Quiz

This is one of the most commonly used Moodle features. While this is a very traditional classroom component, there are ways of modernizing quizzes by adding images and audio. These can include descriptions to help learners who have visual impairments. Tip: When setting questions on a page, it is recommended to include 1–5 per page to avoid issues with performance. Try to think of 100 questions, all loading media, on a single page. It can really slow things down and cause major time lags, so fewer is better.

Choice Activity

This feature, used for polling, can be a simple and effective way to build interactivity within a course. It's also a great tool for getting feedback from learners on what they have taken away from a learning resource, how they feel on a particular topic, and even how they felt about the material used in the course.



COURSE MANAGEMENT

Course Categorization

Moodle acts as a container for courses, and if you have more than a few, you can organize them under categories. Based on the particulars of your organizational context, you may have, for example, a subject-based categorization, or a level-based categorization.

Using Course Backups

You can use course backup files as templates to build other courses. Using the automated course backups can also help with recovering deleted learning resources and activities. (See next page for screen shots)

After making and storing a copy of the courses and site,make sure you remove all old courses that are no longer needed from the production site.

Archiving Course Strategies

While there is no one correct approach to archiving courses, we find it worthwhile to consider taking the following steps:

Make a backup of the course. You can do this either through a manual course backup, automated course backup, or a full copy of the site.





Make a backup of the course. You can do this either through a manual course backup, automated course backup, or a full copy of the site.

Please note that the last option can Store the copy of your courses and your site outside of your hosted platform, such as on a network drive behind lock and key.

It is best practice to store backup copies on a <u>separate storage</u> happens to the computer, whether it gets lost, stolen, or damaged, you will lose that data, and you will have a serious privacy breach issue.

Store 2 or more copies of all content, in case one of the copy is corrupted or compromised. As well, it's good practice to store the backups of content on a separate storage device.

After making and storing a copy of the courses and site, make sure you remove all old courses that are no longer needed from the production site.



Automated backup s	etun				
Active backup backup_auto_active	Disabled Disabled Disabled Change whether a rest to do not exceed beginns if many lies elected as temperal beginns will be possible only by the outer moted beginns CLI series.				
	Choose whether or not to do automated backups. If manual is selected automated backups will be possible only by through the automated backups CLI script. This can be done either manually on the command line or through cron.				
Schedule backup backup_auto_weekdays	Sunday Monday				
adentify a destrop_acto_recentarys	☐ Tuesday				
	□ Wednesday □ Thursday				
	□ Friday □ Saturday				
	Default: None Choose which days of the week to perform automated backups.				
Execute at	0 \$ 0 \$ Default: 0:0				
backup backup_auto_hour	Choose what time automated backups should run at.				
Automated backup storage	Course backup filearea Default: Course backup filearea				
backup backup_auto_storage	Choose the location where you want backups to be stored when they are automatically created.				
Save to	Default: Empty				
backup backup_auto_destination	Full path to the directory where you want to save the backup files				
Keep	1 + Default: 1				
backup backup_auto_keep	How many recent backups for each course do you want to keep? (older ones will be deleted automatically)				
Use course name in backup filename backup backup_shortname	Default: No Use the course name as part of the backup filename.				
Skip hidden courses	□ Default:Yes				
backup backup_auto_skip_hidden	Choose whether or not to skip hidden courses				
Skip courses not modified since backup backup_auto_skip_modif_days	30 days 💠 Default: 30 days				
backup backup_auto_skip_modir_days	Choose to skip courses that have not been modified since a number of days				
Skip courses not modified since previous backup	□ Default: No				
backup backup_auto_skip_modif_prev	Choose whether to skip courses that have not been modified since the last automatic backup. This requires logging to be enabled.				
Automated backup settings					
Include users	Default: Yes				
backup backup_auto_users	Sets the default for whether to include users in backups.				
Include role assignments backup backup_auto_role_assignments	Default: Yes If enabled by default roles assignments will also be backed up.				
Include activities and resources	☑ Default: Yes				
backup backup_auto_activities	Sets the default for including activities in a backup.				
Include blocks backup backup_auto_blocks	☑ Default: Yes Sets the default for including blocks in a backup.				
Include filters backup backup_auto_filters	Default: Yes Sets the default for including filters in a backup.				
Include comments backup backup_auto_comments	Default: Yes Sets the default for including comments in a backup.				
Include badges backup backup_auto_badges	Default: Yes Sets the default for including badges in a backup.				
Include user completion information backup backup_auto_userscompletion	☑ Default: Yes If enabled user completion information will be included in backups by default.				
Include logs backup backup_auto_logs	□ Default: No If enabled logs will be included in backups by default.				
Include histories backup backup, auto, histories	Default: No Save changes Sets the default for including user history within a backup.				
Include question bank	☑ Default: Yes				



Part 2 of our **Moodle Installation & Setup Guide** will assist you with the configuration of your site. There are many default settings in Moodle that you have the power to manage, but what areas require configuration, and which ones are okay to leave with the default settings? We will outline the ones that will likely be of use to you and which you will need to enable.

SITE CONFIGURATION

Advanced Features

There are features in your Moodle site that really extend the functionality of your Moodle, but are not considered plugin based. These advanced features can be enabled or disabled as needed. There are quite a few features that you have to choose from, so to make things easy, we have highlighted just a couple of key advanced features that are commonly enabled.

Outcomes: These are goals you can set up in a course and attach to learning activities, to help evaluate a learner's competency in a subject.

Web Services: When enabled, these can be used to connect Moodle with other applications. Completion Tracking: If you choose to enable this setting, you can track the criteria for courses, and the activities within those courses. Note that once Completion Tracking is enabled in "Advanced Features", it then needs to be enabled in the "Course Settings"

Conditional Access: Here you can restrict the access users have to the learning resources and activities within a course, based on their different qualifications such as grades, completion status (of other activities), profile fields, and groups they belong to.

Users

User accounts are the profiles created for the learners in the Moodle site, that require the person to login to his or her account using a username and password. There are quite a few different ways to create users. Once the accounts are created, users can then begin enrolling in courses.

Registration, Authentication, and Enrollment

For the sake of simplicity, we will break registration into 3 main categories: User based, Manager or Administrator based, and Automated. Keep in mind that you do not have to pick one in isolation. You can use a combination of multiple authentication methods if you wish.

1) User Based: In this case, learners create their own accounts. TIP: If enabled, it's highly recommended to use Recaptcha with the registration option to prevent fake accounts from being created.

Use cases for the User Based Approach: When conducting client/customer based training where courses are being sold, or the client is unknown and Moodle is acting as the primary application for the student information.



2) Manager or Administrator Based: Learner accounts are created by Moodle administrators or managers on the site, either manually one-by-one, or by processing a list of users contained in a file (like a CSV file for example).

Use cases for the Manager or Administrator Based Approach: When learners accounts are contained in a different application other than Moodle, or registration takes place using a different method. This list of users is then exported, and processed. This can be used for client based scenarios where the client base is already known and access to Moodle needs to be extended, but most commonly this method is used for partner and internal training.

3) Automated: In this case, a list of learners either already exists, or it is created in another application. In the latter case, there is an automated approach that creates the learner accounts in Moodle, based on the data being transferred from one application to Moodle.

Use cases for the Automated Approach: This method is good for client based training (where the users are known), internal training, and partner training.

Course Enrollment

Enrollment is the method of adding users to a course, so that they can participate and engage within the course. Moodle is modular in nature, so it offers many different ways to enroll a user into a course.

- Self-enrollment is the method that allows users to manually enroll themselves in a course. This is a great option if you want learners to be able to choose which courses they would like to take, or if the courses are optional. You can see what the self-enrollment window looks like below.
- Manual enrollment is done by an administrator, manager, or instructor. This method works well when there are a small number of users being added to a course, because it does not take long to add them manually.
- A Cohort Sync allows a manager or administrator to add users into a group called a "Cohort." They can then enroll an entire cohort into a course, thus adding multiple, grouped users. This works well if there are a small to medium number of users being enrolled. The strength of Cohorts is when a group of users is taking a number of the same courses, as it makes enrollment much quicker and simpler.
- A Flat File enrollment allows enrollment of bulk users, without having to manually enter the information from the user interface. The file created is saved as a comma separated value (.csv). In some cases, this can be generated from another system, or manually created by a manager, instructor, or administrator. This method works well when there are a larger number of users being enrolled into a course.
- There is a PayPal method of enrollment, that allows users to browse courses, enroll into a selected course, and pay for it through PayPal. This is the method to use when access to content is being sold, and when users are picking their own courses. It is also well suited for client training, and/or partner training where the list of users is unknown.
- An LDAP method allows user enrollment to be driven by information contained within the LDAP server. This method works when the list of users and the list of courses are known in the LDAP server.



User & Site Policies

The User & Site Policies sections of Moodle contains feature settings relating to the context of users and learners, or larger features impacting the operations of the site as a whole.

Password Policy: This allows you to configure the minimum requirements for a password. Moodle has a strong focus on security, so the password settings require a minimum of eight characters, one uppercase letter, one numeric value, and one special character. Of course there is the option to relax these password requirements, but we recommend keeping the password policy strong.

Hide selected user fields: In Moodle, there are a number of included optional profile fields, which may or may not be of interest to you. For this reason, you have the option of hiding these fields so that they are no longer visible to the user.

User storage quota: When a learner, instructor, or any user on the site uploads a file, there is the potential of the file being stored on the hosting package's storage system, which contributes to the user's storage allotment.

Maximum Upload File Size: This setting allows the administrator to set the maximum file upload size per file. For example, a maximum of 50MB file uploads can help prevent instructors and learners from uploading large files. This setting can then be adjusted to a lower amount with courses.

Define Roles, New Roles, and Role Permissions

- · Role assignments can be useful for all learner scenarios. In the most simple setup, there is usually
- · An administrator, who can do everything
- · An instructor, whose role is just to teach
- · Learners, whose roles are designed to learn, and participate in courses

The ability to create new roles works well for partners, as well as people in internal roles such as managers, and directors who may only need to carry out specific tasks.

- · The permissions and privileges of a role can be set to either "grant" or "deny."
- · New roles can be created as the need arises.



Default Course Settings

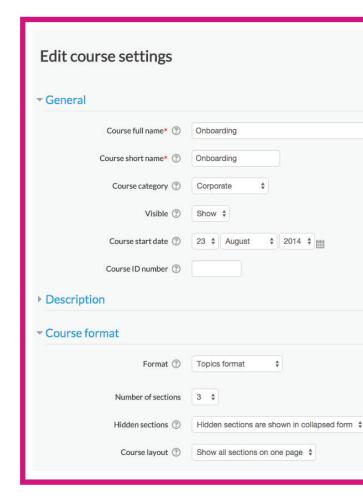
specific settings are used.

Moodle course settings allow a high level of setup for how you want your course to run. This process is commonly referred to as "setting up course shells." There are a few settings in particular that can really impact the way a course operates, which we will go through with you.

Configuring the default settings of the course format

- Give your course a title both a full name, and a short name – as well as a summary. These descriptors can be made visible on certain pages before a student is enrolled, or on the front page when
- · Identify the learning structure, which will become the format of the course. The course is broken down into a number of different sections, and these sections can then be organized by weeks, or topics.
- · Weeks: Organizing course by weeks is the recommended method when the course is a known number of weeks, with a specified start and end date. This format is often used for an academic setting, but it can also be used for when there is a new intake of staff going through the course at the same time. These types of courses are often instructor led in a blended learning format, but they can also be self-paced.
- Topics: Organizing course by topics is the recommended method in open enrollment type courses, where learners start at different times. This works well for client based training, internal training, and partner training. This method can be used in both blended learning style courses, and self-paced courses.

In the course layout, you can manage whether you want sections to be fully displayed, or to be collapsed (to show only one section per page) showing the title, summary and an indicator of the number of learning resources and activities in the section. A full display layout works in short courses, and a collapsed display layout works for bigger courses with a large number of learning resources.



Visibility Settings

As the name suggests, this is where you can control whether a course is visible to students. By making a course invisible to students, instructors and administrators can go in and work on it.

Grades General Settings

Here, instructors can decide if they want to display the gradebook and activity logs to students. Making these features invisible is common in courses where grades are not crucial to the learners success, or if there is a different applications being used to display grades to learners.



Default settings of grade format

Moodle has a gradebook area, which offers Moodle instructors a large degree of flexibility. Instructors can use the gradebook to set-up categories and apply different grading aggregation, using calculation such as means of grades, or weighted grades.

Primary grade export methods

Grades can be exported using a number of different file formats, such as OpenDocument Spreadsheet, Excel, Plain Text, or XML.

Configuring the native plugin functionality

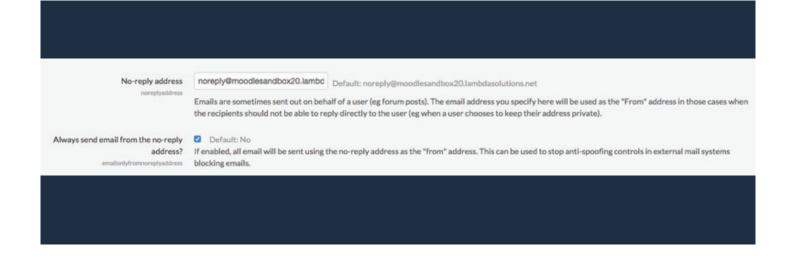
In Moodle, there are different learning activities and resources. These activities and resources often have default settings that will apply to the activity when it is first being setup, to help both with consistency and efficiency when creating courses.

Message Outputs

Also known as "Communication Channels", message outputs are used for the different types of messages sent in Moodle, such as forum notifications, grading, and enrollments. These can be configured and set as a preference for each user account in Moodle. Administrators have the capability to set a default that will be used on the site, and can even restrict the ability to change a messaging preference for important types of notifications.

Email recommendations:

- To help prevent email messages being marked as spam, all the email messages sent out can come from a no-reply email address
- To help prevent email messages being marked as spam, setup an SPF record
- To help prevent being email blacklisted, don't use fake email accounts for users in the site with a live or real domain name / URL
- · Configure the Support Contact for your site to use an email that matches your domain name being used. For example, the email could be something like support@ training.abccompany.com.





Name	Active?	Order	Settings	Uninstall
Embedded files	Enabled and visible \$	+	Settings	Uninstall
Server files	Enabled and visible ‡	++	Settings	Uninstall
Recent files	Enabled and visible ‡	++	Settings	
Upload a file	Enabled and visible ‡	++	Settings	
URL downloader	Enabled and visible ‡	++	Settings	Uninstall
Private files	Enabled and visible ‡	++	Settings	
Wikimedia	Enabled and visible ‡	++	Settings	Uninstall
Youtube videos	Enabled and visible ‡	++	Settings	Uninstall
MediaCore search	Enabled and visible \$	+	Settings	Uninstall
Alfresco repository	Disabled \$			Uninstall
Box	Disabled \$			Uninstall
Legacy course files	Disabled \$			
Dropbox	Disabled \$			Uninstall
EQUELLA repository	Disabled \$			Uninstall
File system	Disabled \$			Uninstall
Flickr	Disabled \$			Uninstall
Flickr public	Disabled \$			Uninstall
Google Drive	Disabled \$			Uninstall
Merlot.org	Disabled \$			Uninstall
Picasa web album	Disabled \$			Uninstall
Amazon S3	Disabled			Uninstall
Microsoft OneDrive	Disabled			Uninstall
WebDAV repository	Disabled ‡			Uninstall

Repositories

Repositories are storage areas where files can be added and used on your Moodle site. There are both internal and external repositories. An example of an internal repository is the hosting platform running the Moodle site.

A few examples of external repositories are YouTube, Wikipedia, and Google Drive.

A good general practice to begin here is to go into the repositories section, and see if there are any Repositories your organization might be interested in using.



Appearance Settings

Menu Navigation

Moodle has a few features that can help users with organization.

- · On the site level, there is a helpful feature called "My Home/My Moodle" that is good for keeping the learners enrolled in multiple courses organized. This feature acts like a dashboard for learners, and can be set as the default home page for the site. That means that when students click on the home navigation menu item, they will be taken to this page if you wish.
- · On this page, you also have a setting called "Show Course Categories" that can be disabled or enabled. If enabled, it will display the course categories in the breadcrumb area and navigation blocks

Media players (YouTube, Flickr, Vimeo)

Moodle has filters that scan the HTML content upload / created in Moodle, and will display links to media using a media player. This allows instructors to simply add a link to a recognized media file, and have it play in the media player without having to know how to embed HTML media related tags. At Lambda, we have found that clients prefer to enable all the different types of media, and that the Vimeo filter (set to "no" by default), is a popular media filter that is often switched on.

Front Page Settings

Course Visibility

This is the setting that controls how, and if courses will be displayed on the front page.

- · You can decide whether to display courses when users are not logged in, and/or logged in
- · You can decide if you want courses to be displayed in a listing, in a combination of course categories and courses, or not at all
- · If learners are expected to find and sign-up for their own courses based on interest, then displaying courses on the front page generally works well.
- · If learning is assigned to the learner, then you can display courses only once the learner is enrolled.

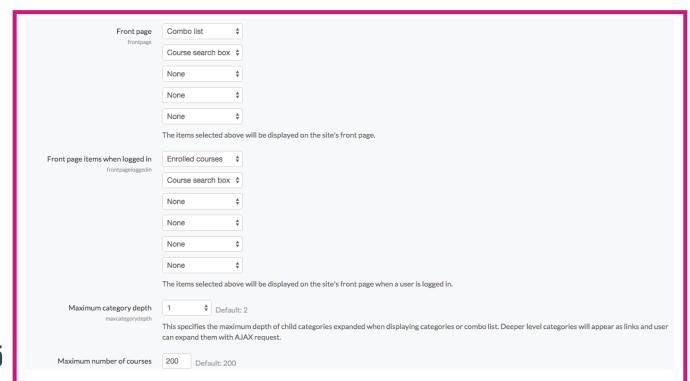
Site Name and Site Summary

• This feature is tucked away, so people tend to forget to name their Moodle site, and provide a description. Consider this your reminder!

Maintenance Mode

If the site is undergoing a large amount of work, such

as an upgrade, then site access for everyone except for administrator accounts can be turned off. A message can also be displayed to notify users of this.





SETUP BEST PRACTICES AND RECOMMENDATIONS

Domain Name

- · The site can operate with your own domain name. For example, it could look something like training@ yourcompany.com.
- · The site can operate with an SSL certificate providing HTTPS as an extra layer of security for either the full site, or just the login pages.

SCORM

A few SCORM activities recommendations we have are:

· If your packages are passing back a large amount of data, you may need to disable the setting for strict adherence to SCORM 1.2 standard

scorm | scorm of text or if your package tries to store large amounts of data in the suspend_data field disable this.

ABOUT LAMBDA SOLUTIONS

Founded in 2002, Lambda Solutions is a one stop shop that works to reduce the cost of your learning and training while increasing the value of your human capital. To help you achieve this, Lambda offers powerful, flexible and open source talent and learning management systems—Totara and Moodle—which are 80% more cost effective and match leading systems feature for feature. By managing your system in the most powerful cloud hosting environment worldwide, Lambda Solutions reduces your IT operating costs by more than 40%. And with responsive and prove expertise from over 600 customer implementations, our HelpDesk ensures fast and efficient Totara and Moodle set-up so your time to use is within weeks not months. More than half a million people learn on Lambda's managed hosting platforms everyday—let your learners be one of them!

Lambda Solutions is focused in healthcare, education and corporate training providing solutions for enterprise-class customers such as Mt. Sinai Hospital, Children's Hospital of Los Angeles, Rutgers University, and Four Seasons Hotels and Resorts. Lambda Solutions is a Totara Platinum partner. The company has offices in the United States, Canada and Europe. For more information, visit www.LambdaSolutions.net

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