Chapter No. 4

"Moodle for Managing Compliance Training"
In this package, you will find:

A Biography of the authors of the book

A preview chapter from the book, Chapter NO.4 "Moodle for Managing Compliance Training"

A synopsis of the book’s content

Information on where to buy this book

About the Authors

**Jason Cole**, Ph.D is the Chief Operating Officer for Remote-Learner, US, an official Moodle partner providing hosting, support, and instructional design services. Jason oversees Remote-Learner's daily operations, providing technical services to over 1,100 clients, from small non-profit organizations to Fortune 500 companies.

Jason started using Moodle at San Francisco State University in 2003 when he led the transition from Blackboard to Moodle. Later, he led the implementation of Moodle at the Open University in the UK, currently one of the top three largest Moodle deployments in the world. Over the ensuing two years he successfully architected a system that currently supports over 225,000 student users with multiple enrollments.

Jason is the co-author of Using Moodle (c2006 & 2007) published by O'Reilly Community Press, and has been the organizer of several successful Moodle Conferences in the US and UK.

I would like to thank my wife, Jeanne, for taking the leap and writing this book with me. Her dedication was an inspiration and her support made the book possible.

For More Information:

Jeanne Cole is a Senior Project Manager for Remote-Learner US. She is an experienced Moodle course developer and project manager who has migrated hundreds of courses from other learning management systems to Moodle, as well as created courses from client materials. She also has experience managing projects applying multiple open source products to meet a wide variety of client needs.

Prior to her Moodle career, Jeanne worked as a project engineer/manager for contractors in the US and UK.

I would like to thank both of my very experienced and knowledgeable co-authors for giving me the opportunity to work with them on this book. A special thanks to my husband, Jason, for his never-ending patience and support.

Gavin Henrick has worked with technology in business, learning, and development for over ten years. He has been consulting on using Moodle, Mahara, and other open-source applications for the last four years. He has run several websites and runs his own blog (www.somerandomthoughts.com). He is a regular speaker at a number of Moodlemoots and conferences on the use of Moodle in the corporate space focusing on practical examples of usage.

Gavin recently joined the Moodle Partner Remote-Learner and is based out of Canada working with a range of organizations in Canada and Europe.

Through working on this book he has learned so much on the diverse and innovative ways of using Moodle to support learning, training, and development.

Firstly I would like to thank Enovation Solutions and Remote-Learner for the opportunity to work with and learn from some fantastic people over the last few years.

I would also like to thank all of the participating organizations for their generosity in contributing the case studies. The case studies in the book will provide inspiration to others as they consider rolling out Moodle.

I would like to thank the Packt editorial team and the book reviewers who provided excellent feedback and direction throughout the editing of the book. You have certainly helped make this a better book.

I would like to thank my co-authors who have taught me so much about writing and about new approaches to using Moodle.

A special thanks to Martin Dougiamas for his vision and dedication to learning and Moodle.

For More Information:  
Moodle 2.0 for Business
Beginner’s Guide

Moodle 2.0 for Business will show you how to set up Moodle in your corporation. Think of all the time you could save by putting your existing training material online. Think of the printing costs that you could reduce by putting HR documents on your staff site, and think of the team spirit that could be created by setting up staff forums.

What This Book Covers

Chapter 1, Getting Started With Moodle introduces you to the background of Moodle. It covers the benefits of using open-source software in business, and how to take your first steps in experimenting with Moodle.

Chapter 2, Moodle in Hiring and Interviewing discusses how to use Moodle to facilitate the hiring and interviewing process. This chapter demonstrates how to use Moodle to accept resumes and job applications, and how to create interviewer resources to support the hiring process.

Chapter 3, Rollout Products and Services with Moodle shows you how to set up a course to cater for product knowledge training. Learn how to set up a glossary and to organize a real-time roleplay using Moodle Chat.

Chapter 4, Moodle for Managing Compliance Training discusses how to deliver compliance training with Moodle. This chapter looks at the Moodle Lesson and how to configure completion tracking for full course completion reporting.

Chapter 5, CPD and Competency Tracking with Moodle explains competencies and how they are used in Moodle. The chapter will shed light on how to use competencies in assessments and how to view them in the gradebook.

Chapter 6, Communities of Practice in Moodle takes a look at building communities with Moodle. You will learn how to set up a wiki, glossary, and database for collaborative projects. You will also learn about how to use roles for specific tasks.

For More Information:
Chapter 7, *Web Conferencing with Moodle* examines some of the main web conferencing software in use with Moodle and what features and options are available. The chapter covers how to set up and configure two systems with Moodle, BigBlueButton, and Adobe Connect Pro.

Chapter 8, *Integrating Moodle with Other Systems* introduces a range of systems which can integrate with Moodle including Alfresco, a document management system, Mahara—an e-portfolio platform, and GoogleDocs.

Chapter 9, *Integrating Moodle into the Enterprise* identifies the authentication options in Moodle. It introduces how enrollment works and how to do basic customizations to the look and feel of your Moodle site.

For More Information:
Companies must find a way to successfully manage many kinds of risks including legal compliance, health and safety, security risks, and privacy risks. Training can be an important part of a risk management program or process. Depending on the industry there could be several external regulations as well as internal company mandates. Human resource managers must develop programs to ensure legal compliance and the mitigation of risk. In this chapter we will build on what you have already learned and introduce you to several more Moodle tools that can be used for risk management and compliance training.

Throughout this chapter think about how Moodle can help manage risks and ensure regulatory compliance through training.

In this chapter we shall:

- Learn how to use the Moodle lesson module to deliver compliance training
- Learn how to create hide and show activities based on group membership in Moodle
- Learn how to track student completion in your Moodle course
- Learn how course completion reports can be used to facilitate compliance training

So let's get started...

For More Information:
Using Moodle to manage compliance training
Compliance training is a very important part of an organization's risk management strategy. Moodle has a number of tools that you can use to deliver and manage required training for your employees. In this chapter we will explore the lesson module as well as some useful user management tools to ensure your employees receive the training they need.

Using the lesson module as a training tool
Every human resources manager must understand and comply with a multitude of regulations and establish policies and procedures to ensure their company is in compliance. Additionally, there are several internal risks to consider including work-life discrimination, protection of confidential information, workplace privacy risks, and so on. Many companies develop training programs as a way to mitigate and avoid certain risks by making employees aware of the company policies and procedures. Moodle's lesson module is a useful tool for this type of training. Using Moodle's inbuilt lesson module is also a time and cost-effective alternative to relying on third-party authoring tools that publish Scorm.

The lesson module uses two different page types, which can be implemented in several different ways to create an interactive learning experience for the user. First, the question page asks the user a question and then provides the user with feedback based on their response. The question pages are graded and contribute to a user's grade. The second page type, the content page, presents content and navigation options without grading the user's response.

Creating a lesson module
Let's take a business case study example. You are developing a lesson module on basic office safety. To train employees on basic fire safety, you decide to use a common active training method—the case study. Before we dive into the lesson module, let's take a moment to decide how we're going to implement this. First, we are going to use a content page to present a realistic building fire scenario and have the learner choose their first action. Second, we will create a question page to present the learner with a scored choice regarding fire safety. Third, we need to then come up with feedback based on their responses.

In reality, the fire safety plan would probably be part of a larger emergency action plan. However, for the purposes of this chapter we are going to keep things simple and address a scenario that may be used when training employees on fire safety.

For More Information:
Lesson modules can get quite complicated if you let them, depending on how many choices the reader has for a given scenario and how long the chain of reasoning is. Many experts suggest developing a flowchart to plan out your lesson module before creating it in Moodle. For our purposes, we will just take it through the first choice to show you how to use the content page and then a question page. Once you have that down, it will be easy to keep repeating the process to make your lesson module as simple or complicated as you'd like.

**Time for action – creating a lesson module**

1. Log in to your Moodle site as an administrator. Create a course for your compliance training by following the instructions in *Chapter 1, Getting Started with Moodle*.

2. Click the Turn editing on button in the top-right corner.

3. Go to the section you want to add the lesson to and from the Add an activity... drop-down menu, select Lesson. You should now be on the Adding a new Lesson page.

4. The first section of the page is the General section.
   - In the Name field, enter the title of your lesson, for example "Fire Safety".
   - If you want to enter a time limit for the lesson, click the checkbox to the left of Enable at the Time limit (minutes) field and enter the time limit you want implemented, in minutes, for the lesson. For the purposes of this example, assume that if I do not give you a specific value to enter for a field, leave it set at the default.
   - If you want to restrict the availability of the lesson to certain dates, then click the checkboxes next to Enable and enter the Available from date and Deadline date.
   - Under Maximum number of answers, select the maximum number of answers that may be used in the lesson. For example, if it only consists of True/False questions, this would be 2.

There are a lot of settings in the lesson module. You are not expected to remember them all. I don't! Next to most of the settings is a ? icon. Select this icon for a description of the setting anytime you can't remember what its purpose is.

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**For More Information:**

5. **Grade** is the next section on the *Adding a new Lesson* page.

- For **Grade**, select the maximum score that can be given for the lesson from the drop-down menu. If there is no grade, then select **no grade** from the drop-down menu. We are not going to use question pages for our case study example, so for here select no grade.

- The **Grade category** refers to the category in the grade book. We have not set the grade book up yet, so leave this as the default **Uncategorised**. There will be nothing else available yet in this drop-down menu if you have not set up categories in the grade book.

6. Next go to the **Grade options** section and select your settings.

- In the **Practice lesson** setting, select **No** from the drop-down menu if you want the grades for this lesson to be recorded.

- The **Custom scoring** setting allows you to give a score (positive or negative) for each answer. For our example, select **No**. This could be a useful tool if there are different levels of right and wrong answers and you wish to capture this in the grade book.

- If you want to allow re-takes, select **Yes** from the drop-down menu at the **Re-takes allowed** setting.

- If you selected **Yes** in the previous setting and are allowing re-takes, then you need to select the method for grading in the next setting—**Handing of re-takes**. Your two choices from the drop-down menu are **Use mean** or **Use maximum**.

- The **Display ongoing score** setting, if **Yes** is selected from the drop-down menu, will allow the user to see their current score out of total possible thus far in the lesson. The following screenshot shows the **General, Grade**, and **Grade options** sections of the **Create a lesson** page.
7. Now go to the **Flow control** section and select your settings.

- **Allow student review**, if **Yes** is selected, gives the user the option of going through the lesson again from the start after they have completed the lesson.

- **Provide option to try a question again**, select **Yes** from the drop-down menu to give the user the option to take the question again for no credit or continue with the lesson if they answer a question incorrectly.

- If you selected **Yes** for the previous setting, then in the next setting, **Maximum number of attempts**, you must select the number of attempts allowed from the drop-down menu. If the user answers the question incorrectly repeatedly, once the maximum number of attempts is reached the user will proceed to the next page in the lesson.

- If you want the default feedback for correct and incorrect answers to be shown when no feedback has been specified for the question, then at the **Display default feedback** section, select **Yes** from the drop-down menu. Default feedback for a correct answer is "That's the correct answer" and for an incorrect answer is "That's the wrong answer".

- If **Yes** is selected for the **Progress bar** setting, then a progress bar is displayed at the bottom of each page.
When set to Yes the Display left menu setting provides a list of all the pages in the lesson on the left side of each lesson page.

8. The Pop-up to file or web page section allows you to choose a file to display in a pop-up window at the beginning of a lesson. It also displays a link to reopen the pop-up window in every subsequent page in the lesson.

9. The Dependent on section allows you to restrict access to the lesson based on performance in another lesson in the same course. Restrictions can be based on any combination of completion, time spent, or minimum grade required.

   - Under Dependent on, select the lesson required before access to this lesson from the drop-down menu.

   - Time spent (minutes): If time spent is one of the requirements, then enter the minimum number of minutes required.

   - Completed, if completion is a requirement, then check the box.

   - If a minimum grade is required, then for the Grade better than (%) setting, enter the minimum grade required. The following screenshot shows the Flow control, Pop-up to file or web page, and Dependent on sections of the create a lesson page.

For More Information:
10. Once you have entered all your settings on the lesson page, click on the **Save and display** button at the bottom of the page. You are now on the editing page for the lesson you just created. See the following example:

![Example Image]

**What just happened?**

We have just created the shell of a lesson activity for our learners. In the next steps we will add content to the lesson and learn how to ask the learner questions.

**Time for action – creating a content page**

Now that we have the shell of the lesson, we can begin to add content. We'll start with adding a simple content page.

1. From the editing page for the lesson you just created, select **Add a content page**.
2. Enter a descriptive title in the box next to **Page title**. For our example, we will enter **Building is on fire**.
3. Enter the content for this page in the **Page contents** text area.

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For More Information:

4. If you want the user’s choices for the lesson page to be displayed horizontally, then check the box to the left of **Arrange content buttons horizontally**? You have now filled in the **Add a content page** section; see the following screenshot for our example:

![Screenshot of Moodle interface](image)

5. In the **Add a content page** section you will find sections for **Content 1, Content 2,** and so on. This is where we will create the choices for the user. For our example, we will enter "Grab the fire extinguisher and look for smoke" in the **Description** text area for **Content 1.** Leave the drop-down menu below the text area on the default **Moodle auto-format.** For now leave the Jump drop-down menu as is; we will come back to this later.

6. In the **Content 2** section, enter your second choice in the **Description** text area. For our example, we will enter "Walk calmly to the exit and exit the building."

7. Now scroll down to the bottom of the page and select **Add a question page.** This will save the content page you just created. You will now be on the editing page for the lesson you are creating and you should be able to see the content you just added. See the following screenshot for our example:

![Screenshot showing the editing page](image)

For More Information:
What just happened?

We have now added a content page to our lesson. Content pages can include a wide variety of media, including text, audio, video, and Flash. Next we will look at how to add a scored Question page to test the learner’s understanding.

Time for action – creating a question page

Now we are going to create a question page in our lesson. Question pages are scored and provide the user with feedback on their choices.

1. From the edit page, click the Expanded View option at the top of the page. Then select the Add a question page here link below the content page you just created.

2. From the Select a question type drop-down menu select the question type you want to use. For our example, we are going to select Multichoice.

3. Next click on the Add a question page button.

4. For Page title, enter a title for your question page. For our example, we will enter "Why is this a bad idea?".

5. In the Page contents text area, enter the question you want to ask the learner. For our example, we will enter "Why is grabbing the fire extinguisher and heading for smoke a bad idea?".

6. Below the Page contents text area you will see an Options field; check the box next to Multiple-answer if you are creating a question with more than one correct answer. Our example is going to be single response; therefore we will not select this box.

For More Information:
7. Below the Add a question page section, you will see the Answer 1, Answer 2, and so on, sections where you will enter the possible list of answers the learner will have to choose from. In the Answer 1 section, enter one of the possible answers to the question in the Answer text area. For our example, we will enter "It's dangerous. You should leave it to the professionals".

8. Next in the Response text area, enter the response you want the learner to receive if they select this choice. For our example, we will enter "Firefighters are trained to put out the fire and have the necessary protective gear".

9. Then move to the Answer 2 section and put your second choice and response. For this example, we will have "You can't put out an office fire with a fire extinguisher" for the Answer and "You might be able to put out the fire, but without a respirator you might be overcome by smoke" for the Response.

10. For the correct answer, enter a "1" in the Score field located at the bottom of the corresponding Answer section.

11. Once you have entered all your answers, scroll down to the bottom of the page and select Add a question page to save. Now you are back on the Lesson edit screen and will see the Content page and the Question page you just created. See the following screenshot.
What just happened?

We have now created a question page to test the learner's understanding of the lesson material. We now need to go back and begin to link our pages together with page jumps.

Time for action – creating page jumps

You have now added a content page and a question page, but you're not done yet. Now we need to link the question page to the content page using a page jump. The page jump is simply the link between pages. We need to go back to the Jump field we skipped previously:

1. Go back to the content page you created by selecting the edit icon to the right of the Building is on fire page. The edit icon looks like a hand holding a pencil.
2. Scroll down to Content 1 and from the Jump drop-down menu, select the question page you created. For our example, it was Why is this a bad idea?.
3. Set the jump for Content 2 to the End of the Lesson. If the user selects this option, they will end the lesson.
4. Scroll down to the bottom of the page and click on the Save page button. You will now be back at the edit lesson page and the Jump 1: field will now read Why is this a bad idea?.

What just happened?

We have now linked our pages together using page jumps. In a lesson module, page jumps are used for both navigation and to provide feedback pages for questions. Now we need to go through and test our lesson to make sure everything works.

Time for action – testing your lesson

We have now gone over all the fundamentals you need to create a lesson. Before we move on, we should test what we have created to make sure it is working properly.

1. Currently you should be on the Edit tab for the lesson you created. To the left of the Edit tab is the Preview tab. These are located at the top of the page. Click on the Preview tab.

For More Information:

2. You will now be on the 1st page of the lesson, which was the content page we created. You will see the two choices displayed horizontally below the content as we specified earlier. See the following screenshot:

![Screenshot of a lesson page with options]

3. Select the first choice, **Grab the fire extinguisher and look for smoke**.

4. Now you will be on the question page. This is correct. We created this jump in the previous section. Select an answer and see if you get the response we created earlier in the question page.

**What just happened?**

You just set up a scenario based lesson on fire safety. In the process, you learned the basic tools needed to create a lesson: how to create a content page, how to create a question page, and how to create lesson jumps. You can now use these tools to develop any lesson you would like. Maybe start by taking the example lesson we just created and fill in all the content and questions needed to train employees on your company’s Emergency Action Plan or Fire Prevention Plan.

**Have a go hero – creating flash cards**

In the Moodle lesson module, you have the option of adding a cluster. A cluster is a group of question pages from which a random question page can be selected. The default is an unseen question within a cluster jump. We did not go into this with our example, but it could be a useful tool for creating flash cards. Flash cards would be a useful study tool for employees preparing for a compliance exam.

The unseen question within a cluster jump would keep randomly selecting a question that has not yet been seen by the user until it has gone through all the questions.

For More Information:  
Take a moment and think of a useful purpose for flash cards at your company and create a flash card lesson module. Go on have a go!

**Reflection**

Reflect on the internal mandates and external regulations your company needs to address. What is your organizational strategy for compliance? How could you use Moodle to support your organization’s compliance policies and practices?

**Creating groups and groupings to manage employees going through training**

Many companies have different levels of training for different job classifications. For example, in a construction company everyone in the company needs basic safety training. Employees in the field will need more advanced safety training for working around heavy equipment. Finally, a few employees who handle hazardous materials will need very specific, advanced safety training on the handling of hazardous materials. In this section, we will explore how to use groups and groupings to filter the resources and activities in a course so that only the employees who need certain training will receive it.

In Moodle, a group is a group of users who can work together on an activity while remaining separate from other groups. For example, if a forum is set up for groups, members of the group will only be able to reply to forum postings from members of their own group. If you choose this option, you can even prevent them from seeing any posts from members of other groups.

Groupings are used to restrict access to activities based on group membership. A grouping is composed of one or more groups. Once you have created a grouping, you can limit access to an activity to members of one or more groupings. In our example in this section, we will restrict access to advanced training to only those users who need it based on their group membership.

**Creating groups**

The first step is to create the different groups in your course. For our example, we have three different groups of employees who require different levels of safety training. Therefore, we will create three groups: Safety Level 1, Safety Level 2, and Safety Level 3.
Time for action – creating groups in your course

To create a group in your course follow these steps:

1. Make sure you are logged into your course as an administrator or teacher and editing is turned on.

2. From the Course administration menu under the Settings block, select Users, and then select Groups.

3. Click on the Create group button located at the bottom left of the screen.

4. Enter the group name in the Group name field. For our example, enter "Safety L1".

5. Enter a group description in the Group description text area if needed.

6. Leave the Enrolment key blank for this example. In the future, if you add an enrolment key to your group and a user enrols in a course with that key, they will be automatically added to that group. This could be helpful once you have your course set up and want to automate enrolment in a track.

7. If you want, you can assign a picture to a group. This is what the last two settings are about. If No is selected for the Hide picture setting, then if there is a picture associated with the group it will be displayed. The last setting, New picture, is where you can upload the picture you want associated with the group. The following screenshot shows the Create group page for our example:

For More Information:
8. Scroll to the bottom of the page and click the Save changes button.

9. For our example, go through steps 1 to 8 two more times to create the following groups: Safety L2 and Safety L3. Once you have created three groups, you should see them listed on the Groups page as shown in the following screenshot:

What just happened?
We have now created groups of users in our course. Using groups allows Moodle course creators to use the same activities for multiple user populations.

Time for action – enabling groupings in your course

Before we get into creating groupings, which are groups of groups, we will need to make sure we have enabled groups and groupings in the course. Follow the steps below to enable groupings.

1. Under the Settings block, select Site Administration, select Development, select Experimental, and then select Experimental settings.

For More Information:
On the Experimental settings page, select the checkbox next to Enable group members only. This enables activities to be restricted to only members of a certain group. See the following screenshot:

3. Don’t forget to click on the Save Changes button at the bottom of the screen.

What just happened?
We have now enabled groupings. Groupings allow us to filter activities based on the user’s membership in a group. It is a useful method for using the same course for multiple user populations when you only need a few activities to vary by group.

Time for action – enabling group mode
Now go back to the course and set group mode in the course.

1. From the course home page, go to the Course administration menu and select Edit settings. You will now be on the Edit course settings page.

2. Scroll down to the Groups section and set the Group mode to Separate groups.

3. Scroll down to the bottom of the page and click the Save changes button.

What just happened?
We have now enabled group mode in the course. This is a necessary step to fully enabling groupings.

Time for action – creating groupings
Now we are ready to create groupings in our course. To create a grouping, follow these steps.

1. From the Course administration menu select Users and then select Groups.

2. At the top of the new screen, select the Groupings tab.

For More Information:
3. Click on the **Create grouping** button.

4. Enter a grouping name of Basic Safety in the **Grouping name** field.

5. If desired, enter a description in the **Grouping description** text area.

6. Click on the **Save changes** button.

7. Then follow steps 1 to 5 again and create two more groupings for our example. Name the groupings: Intermediate Safety and Advanced Safety.

8. Now we need to add the groups to the groupings. From the **Groupings** page, under the **Edit** column, select the **show groups in grouping** icon. It is the icon that looks like a group of people. Since the **Advanced Safety** grouping is first, we will add the groups to this grouping first.

9. Once you select the show groups in grouping icon, you will be on the **Add/remove groups: Advanced Safety** page. In the list of **Potential members**, you will see the list of safety groups you created earlier. Safety L3 is the only group that should be a member of Advanced safety. Select **Safety L3** from the **Potential members** list, and then click on the **Add** button. You should now see **Safety L3** in the **Existing members** list and no longer see it in the **Potential members list**. See the following image:

![Add/remove groups: Advanced Safety](image)

For More Information:
10. Click on the Back to groupings button, and then repeat the steps to add Safety L1, Safety L2, Safety L3 to the Basic Safety grouping and Safety L2 and Safety L3 to the Intermediate Safety grouping.

**What just happened?**

We have now created the groupings necessary for our course. The final step in the groupings configuration is to filter activities based on the user’s group membership.

**Time for action – filtering activity access via groupings**

So now you have created groupings in your course. Next we will learn how to filter access to an activity via grouping. For the purposes of this example, imagine we have created three lessons in our course entitled Basic Safety, Intermediate Safety, and Advanced Safety.

1. From the course home page, with editing turned on, go to the Basic Safety lesson and select the update icon, the hand holding the pencil, next to the lesson.

2. Scroll down to the Common module settings and click on the Show Advanced button located on the right.

3. Select the checkbox next to Available for group members only.

4. From the Grouping drop-down menu, select Basic Safety. See the following screenshot:

![Common module settings](image)

5. Click the Save and return to course button.

6. If the Intermediate Safety and Advanced Safety lessons existed, the next step would be to assign the Intermediate Safety grouping to the Intermediate Safety lesson and then assign the Advanced Safety grouping to the Advanced Safety lesson.

**For More Information:**

What just happened?
You have now filtered activities by group membership. Now, only members of the intermediate and advanced safety groups will see those lessons.

Time for action – adding users to groups
In previous chapters you learned how to create users; now let’s cover how you add users to groups.

1. Log in to your course as a teacher or administrator.
2. From the Settings block, select Course administration, select Users, and then select Groups.
3. From the Groups page, select the group you want to add users to. For this example, let’s select the Safety L1 group we created previously.
4. Next click on the Add/remove users button located on the bottom right. You will now be on the Add/remove users: Safety L1 page. See the following screenshot:

5. On the right side of the page you will see a list of Potential users you can add to the group. This lists participants in the course who are not already assigned to the group.
6. To add a user, select the user you want to add from the list of Potential members and click the Add button. The user you just added should now appear in the left Group members column.

For More Information:
7. You can search for users in either column from the Search box below each respective column. This comes in handy when you have a large number of users.

In the Potential members column, you will see a number in parentheses next to the username. This is the number of groups the user is already a member of in the course. If you click on a user who is already a member of a group, the groups that they belong to will appear on the far right under Selected user’s membership.

What just happened?
You have just restricted access to training activities based on the level of training a user needs. When an employee, who only needs basic safety training, logs into your course, they will only see the basic safety training lesson. Likewise, when an employee who needs all three levels of training logs into the course, they will see all three safety training lessons. With groups and groupings you have filtered access to course activities or resources based on the needs of the employee, and with the addition of an enrolment key you could also automate enrolment into groups.

Have a go hero – adding an enrolment key
In the beginning of this section, we briefly mentioned the enrolment key when creating groups. This is a useful tool if you want users to self enrol in a course. You create a group enrolment key and when it is time for the user to take the required training, give them the enrolment key and then they can self enrol in the course. It saves you from having to do it for them!

Try adding an enrolment key to one of the groups you created in the beginning of this section.

Reflection
Reflect on the implementation of training at your company. What groups and groupings would help you best facilitate compliance training at your organization?

Using completion tracking
Completion tracking is a way for users to track their progress through a course. In our safety course, someone who needs to take all three safety lessons would need to know they have finished Lesson 1 before they can move on to Lesson 2. With completion tracking, once an individual has completed part of the training, a check mark will appear next to that activity.
Time for action – enabling completion tracking

The first step is to enable completion tracking on your site.

1. Log in to your Moodle site as the admin.
2. Go to the Site Administration menu located in the Settings block.
3. You will see a search box at the bottom of the Site Administration menu. Type "completion" and click on the Search button. The following screenshot shows the first three search results that will be displayed, which are the three we need to configure:

   ![Search Results - Advanced features]

   - **Enable completion tracking**: When enabled, this lets you turn on completion tracking (progress) at course level.
   - **Enable conditional availability**: When enabled, this lets you set conditions (based on date, grade, completion) that control whether an activity is available.

   ![Search Results - Course default settings]

   - **Completion tracking begins**
   - **Completion tracking ends**

   ![Search Results - General backup defaults]

4. Under Advanced features, select the checkbox next to Enable completion tracking.
5. Under the Course default settings, for the Completion tracking setting select Enabled, control via completion and activity settings from the drop-down menu.

For More Information:
6. The next setting, **Completion tracking begins on enrolment**, allows you to start completion tracking when the user is first enrolled in the course. If you leave this disabled, completion tracking will start when a user enters an activity for the first time. This is important because some completion tracking options are time based and Moodle needs to know when to start tracking time. For our example, we will leave this unchecked.

7. Under **General backup defaults**, make sure both checkboxes are selected next to **Include user completion information**. The first checkbox is to include user completion information in course backups and the second checkbox is to lock this feature so teachers cannot choose to not include completion data.

8. Under **Automated backup setup**, make sure the checkbox next to **Include user completion information** is checked. This way if you have automated Moodle backups set, they will include completion data.

9. Click on **Save changes**.

**What just happened?**

We have now enabled completion tracking at the site level. Course authors can now use completion tracking to show users where they are in the course and report on user progress. The next step is to enable completion tracking in a course.

**Time for action – configuring completion tracking in your course**

The second step is to configure completion tracking in your course.

1. Go to your course logged in as a teacher or administrator.

2. In the **Settings** block, under **Course Administration**, select **Edit settings**. You will now be on the **Edit course settings** page. Scroll down to the bottom and you will now see a new section called **Student progress**.

3. For the **Completion tracking** setting, select **Enabled, control via completion and activity settings** from the drop-down menu.

4. The next setting is **Completion tracking begins on enrolment**. If you enabled this at the site level, then it should already be selected here. If you uncheck it, you can override the site default and not have it enabled for this course.

5. Select the **Save** button at the bottom of the page.

For More Information:  
6. Now if you go back to the course home page, under Course administration, you will have a new option called Completion tracking. Select Completion tracking. You will now be on the Edit Course Completion Settings page.

7. The first section is Overall criteria type aggregation. This sets up how the completion for the course is calculated. There are two options: All or Any. If you set it to All, then all of the completion settings you set on this page must be completed before the course is complete. If you set it to Any, then the course is complete if any of the criteria for the completion settings are met.

8. The next section is Course prerequisites. If you have other courses with completion criteria set, then you can set them as prerequisites for this course. For example, if we set up our previous safety training example into three separate courses: Basic Safety, Intermediate Safety, and Advanced Safety, then we could make Basic Safety a prerequisite for Intermediate Safety and so on.

9. Manual self completion is the next setting. If this is Enabled, then students can mark the course as complete on their own. This is the equivalent of an employee checking a form that says, "I have read this". An example where you may want to use this feature is if you have a course for your Employee Handbook. Once an employee has read the handbook, they can then mark the course complete to indicate that they have read it.

10. The Manual completion by section allows you to set the roles that can manually mark the course as complete. The Aggregation method setting allows you to set whether All the roles selected have to mark it complete or if Any one of the roles can mark it complete. Imagine a course being taught by multiple teachers, for example a training course taught by multiple departments. If you select All here and check the box next to the Teacher role, then every teacher from every department would need to mark the course complete for every participant.

11. The Activities completed setting is where you can mark which activities need to be completed before a course can be completed. This section will only display activities that have activity completion set. We will cover this in the next section.

12. The Date setting, if Enable is checked, means the course is marked complete after the date specified.

13. The Duration after enrolment setting, if Enable is checked, means the course is marked complete after being enrolled in the course for the specified number of days.

14. The Grade setting, if Enable is checked, allows you to set a minimum passing grade for the course to be complete.

For More Information:
15. The Unenrolment setting, if checked, says the course is marked complete when a user is unenrolled. The following screenshot shows the Edit Course Completion Settings page that was discussed in steps 6 through 14.

![Edit Course Completion Settings](image)

If you enable Manual self completion in the course, you will need to make sure you add the Self Completion block to the course. To do this go to the block in the right column titled Add a block and select Self Completion from the Add... drop-down menu. When the students log on, they will see the Self Completion block in the right column and will have a link that says Complete Course... When they click on this link they will receive a confirmation page that reads Confirm self completion. To confirm, they will click on the Yes button.

**What just happened?**

We have enabled completion tracking at the course level. Users can now see whether they have completed a course or not.

**Time for action – configuring completion tracking at the activity level**

After you have enabled completion tracking at the site level, and configured it at the course level, the next step is to configure it at the activity level.
1. Go to the course home page and turn editing on.

2. Select the edit/update icon next to the lesson or other activity you want to configure for completion tracking.

3. Scroll down to the bottom of the settings page for your activity to the Activity completion section.

4. From the Completion tracking drop-down menu, there are three options available:
   - Do not indicate activity completion: Obviously this is what you would select if you do not want to enable completion tracking for this activity.
   - Students can manually mark the activity as completed: We discussed this in the Employee Handbook example.
   - Show activity as complete when conditions are met: Use this when you want to control the conditions of completion.

5. The next two settings, Require view and Require grade, are the possible conditions that can be set if you have selected Show activity as complete when conditions are met.

6. The Require view setting, if the box is checked, means that the activity will be complete as soon as the student views the activity.

7. The Require grade setting, if the box is checked, means the student must receive a grade in the activity before it will be complete.

8. The Expect completed on setting, when enabled, only appears in the activity completion report. It is not viewable by students in the course.

What just happened?
We have just enabled completion tracking at the site, course, and activity level. We have also set up course completion criteria in our course so that both employees and managers can measure progress.

Have a go hero – blank questions
Sometimes a score on a quiz isn’t enough to complete a course. There are times when an expert in the field is required to judge whether a student has successfully met the requirements. Or we may want to mix both face-to-face and online training. For example, a Sexual Harassment course may have both an online reading and quiz component and a face-to-face role-play offline assignment. The moderator for the face-to-face portion of the training would need to judge whether the employee successfully applied what they have learned.

For More Information:
Moodle for Managing Compliance Training

For this *Have a go hero*, create a course that requires both a score on a quiz and moderator approval to pass.

**Reflection**

You now have a few more tools in your Moodle toolbox, but don’t forget that the modules you learned in previous chapters can also be very useful when delivering compliance training. Take a moment and reflect on what you learned previously and how forums, databases, quizzes, and glossaries could also be useful in compliance training at your organization.

**Course completion reports**

In the previous section we went over how to set up completion tracking. This is a very useful feature in Moodle that can be used to keep track of what training an employee has completed and what training they still need to complete. Once you have set up completion tracking, as the administrator or teacher of the course, you will be able to view the course completion reports for each employee. In this section, you will learn how to enable course completion reports and understand what information they provide.

**Time for action – adding the completion status block to your course**

Before you can have access to the completion reports, you need to add the Course completion status block to your course.

1. Go to the course homepage logged in as a teacher or administrator and turn editing on.
2. In the right column you will see a block titled *Add a block*. From the *Add...* drop-down menu, select *Course completion status*.
3. You will now see a new block in the right column entitled *Course completion status*. When logged in as the administrator or a teacher, the block will contain a link to *View course report*, as shown in the following screenshot:

   ![Course completion status block](image)

4. Select the *View course report* link.

For More Information:

5. On the **Course completion report** page, you will see a table that lists all the course completion requirements across the top and all the users down the left column. If a user has met a completion requirement, you will see a check mark in the table cell. In the following example, you will see there are eight users enrolled in the course and four completion elements. **User Five** has completed the **Basic Safety** lesson and so far has a passing grade of 80% or higher. They still have to complete the Safety Quiz and the Intermediate Safety Lesson.

![Course completion report](image)

6. At the bottom of the **Course completion report** page you will find two options to download the report into a spreadsheet. The first option, **Download in spreadsheet format (UTF-8.csv)**, allows you to download a csv file for non-Excel spreadsheets. The second option, **Download in Excel-compatible format (.csv)**, allows you to download in an Excel format.

For More Information:

7. If you are logged in as a student, you will see your course completion status in the Course completion status block. Refer to the following screenshot for an example:

![Course completion status screenshot](image)

8. If you select More details at the bottom of the block, you will be brought to the Completion progress details page. You will see all the course completion requirements set in the course completion settings. In the following example, you can see that the learner is required to complete the Basic Safety lesson, the Sample Safety Quiz, and the Intermediate Safety lesson. Additionally, they are required to get a passing grade of 80% or higher.

![Completion progress details screenshot](image)

**What just happened?**

We set up the course completion status block to access course completion reports and looked at how the completion data is displayed for both the student and course instructor.

For More Information:

Reflection

How will you measure the impact of your training on your company's compliance and other risks? Can you develop measures to correlate training with reduced accidents or lowered risks of fines?

Case Study – Aer Lingus

Aer Lingus was founded by the Irish Government in April 1936 to provide air services to and from Ireland. Aer Lingus' low-cost, low fares model is centred on maintaining low unit cost, offering one way fares, maintaining effective fleet utilisation, and developing the Aer Lingus brand.

Aer Lingus operates over 80 routes to and from the United Kingdom and Continental Europe, and a long haul network to six destinations in the United States.

What was the business problem(s) for which Moodle was chosen as the solution?

The business challenge was the logistics and costs associated with the annual refresher training for 500 pilots. Called "Ground School", the training programme incorporates simulator training with procedural and aircraft operation training. All 500 pilots must complete the course each year in order to maintain their flying status in accordance to EU regulations.

What was the solution and how did they arrive at the solution?

The solution was to move the ground school element of the programme into an online environment to allow pilots who spend a lot of time travelling to access the training material from anywhere in the world that their works finds them. Online training offers much more flexibility than classroom training and is becoming more prevalent in the airline industry as a result.

For More Information:

Why did they choose Moodle?

Aer Lingus researched a number of learning management systems from other providers but found that proprietary offerings varied in what they could do and were not as flexible as open source solutions. Moodle satisfied requirements in terms of features and functionality, but also had the open source flexibility which allowed Aer Lingus to customise it to suit their own needs. The reporting aspect of Moodle also meant that Aer Lingus could meet one of their key requirements—the ability to report on user activity to demonstrate regulatory compliance to the relevant authorities. Other requirements included security and the ability to deliver third-party content.

Was the project a success?

In October 2008, the project was successfully piloted to a group of instructors in a classroom environment. Aer Lingus then went on the launch the live site in January 2009 for the first round of 2009 training schedule. The pilots had three months to complete the course with the end of March being the cut-off date.

Feedback from Conor Rock, Training Captain at Aer Lingus, is a positive validation of Enovations work on the project: "Enovation delivered on all of our requirements. Moodle has been universally well received by the pilots and we have reduced our training costs, and from what can I say—the project has been a huge success."

What were the benefits gained?

There were a number of benefits gained:

- Logistics: The pilots can now access the training content from anywhere in the world, reducing the need to coordinate attendance at training headquarters in Dublin.
- Cost reduction: Online courses reduce the need for trainers and other related costs.
- Reporting in accordance with EU regulations: The Aer Lingus training department can produce reports to show that users view and complete all tasks within Moodle by a specific date.
Summary

We have covered one of the most powerful Moodle modules and implemented several Moodle features that will help facilitate compliance training. Take a moment to review these one more time before moving on to the next chapter.

Specifically, in this chapter, we have covered:

- How the Moodle lesson module works and how it might be used to deliver compliance training
- How to create groups and groupings in Moodle to manage all the different levels of training required
- How to set up completion tracking and completion status reports to let employees and human resource managers know where individuals stand in their training

As you know, training is not just important for compliance and risk management; it is also just as important in continuing professional development. Keep in mind what you have learned in this chapter as you move on to the next chapter regarding continual professional development and competency tracking.
Where to buy this book

Free shipping to the US, UK, Europe and selected Asian countries. For more information, please read our shipping policy.

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