# MOODLE ACADEMIC YEAR-END PROCEDURES (EDULINK)

Information & guidance on how to perform year-end procedures

# Contents

# Introduction

If your Moodle platform is used in an academic environment (e.g a school, college or university) there are a number of factors to consider to ensure your platform is kept organised and is prepared for a new academic year.

Whilst there are a larger number of strategies to use than this document contains, those listed here are our preferred (and often most efficient) methods based on the hosting options that we provide at Titus Learning.

Depending on the chosen method the responsibility may lie with one person or be distributed amongst a number of individuals. This will depend upon the internal structure in place regarding the learning platform.

# Initial considerations

Please find below some initial considerations before any year end processes are implemented.

- ## When will this process be completed?

While this process can be completed at the **end of the academic year** this is likely a busy time for both teaching and support staff. You may wish to introduce this process during the summer break when usage of the platform is likely to be lower than during term time.

- ## What will happen to leavers' accounts?

This depends on how users have been created on the platform. If you have created your users manually (this is highly unlikely) then this will be a manual process of having to suspend or delete accounts. If you are using EduLink integration to automatically import users from your MIS then a process is in place to assist with this. This information will be detailed in a section later in this guide. Each organisation may handle this differently so may wish to delete accounts once users have left or wait for a set amount of days then have them deleted.
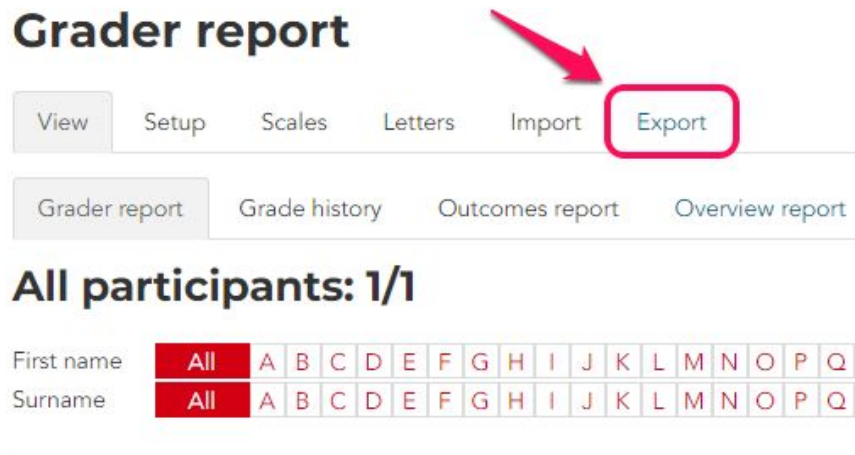
# End of year processes

At year-end we recommend the following steps be taken:

1) **Export gradebook** - If teachers wish to keep a record of grades from their courses, they should export a gradebook report.

2) **Back up courses** - If teachers wish to keep a copy of their course along with any submitted user information (e.g. homework assignment submissions) then we recommend they take a manual backup of the course then download it from the platform to keep it for their own records.

3) **Delete course backups** - Linked to point 2 but important. Once you've created and downloaded your course backup it is advisable to delete the course backup from the system in order to save disk space.

4) **Reset your courses** - Once a course has been backed up for safekeeping, it can be reset which removes all user data from a course but keeps the activities themselves ready to start afresh with students who will then be enrolled for the new academic year.

5) **Roll forward** *(For EduLink integration users only)* - **This is optional** but if you want to see data from the new academic year during the holiday period you can roll forward into the new academic year. This should only be done if you are happy that all the MIS data from the new academic year is ready and correct.

# Exporting the gradebook

If teachers wish to keep a record of grades from their courses, they should export a gradebook report. To export grades from the gradebook first access the course then click to access the gradebook (the user journey may differ slightly depending on the theme used). Following this, click on the *Export* area.
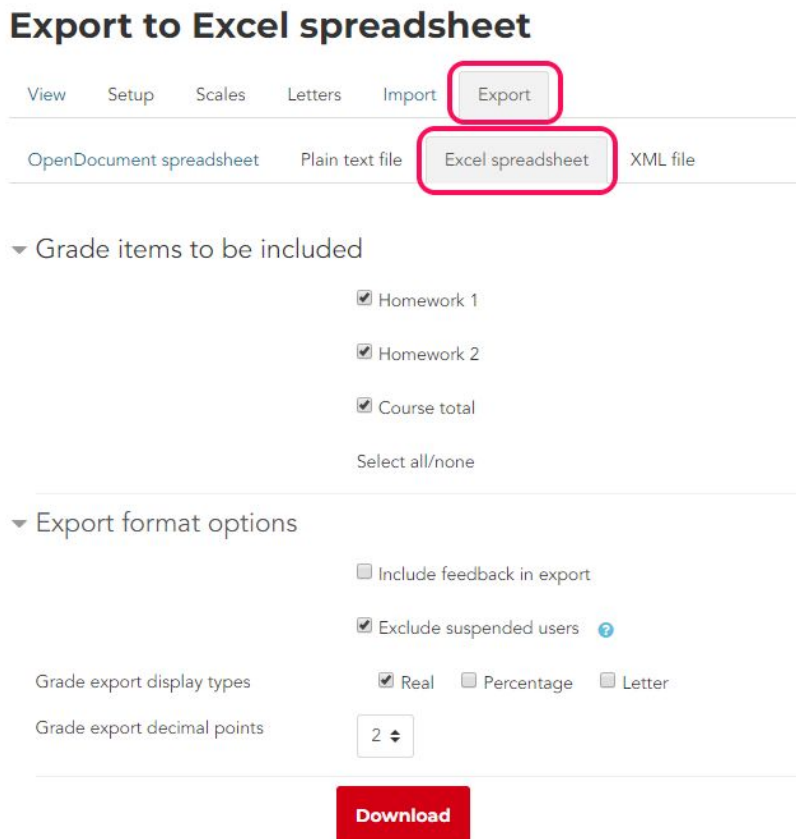


Next choose an export format from the gradebook dropdown menu or in the *Administration* block under *Grade administration > Export*.

Having chosen your desired file format, select which items will be included in the report along with additional export options such as whether to include feedback given.

Click the *Download* button to create the report and download it to your local computer in the requested file format. If exporting to an XLS (Excel spreadsheet) then the students' key details will be present in the file along with their grades and feedback (if option ticked) for each selected activity in the course along with the course total.

# Backing up & downloading courses

If teachers wish to keep a copy of their course along with any submitted user information (e.g. homework assignment submissions) we recommend they take a manual backup of the course then download it from the platform and keep it for their own records.

Please note that, if you want a course backup to include user details (assignment submissions, forum posts etc) this would have to be done by an administrator as a regular course teacher is not allowed, for security reasons, to back up courses with user details. Teachers by default can only restore courses by merging into their current course or by deleting the contents in their current course and restoring their backup. In order to grant teachers access to restore a brand new course instance they will need to be assigned course creation permission within a category.

Once courses are backed up you may wish to leave a copy in Moodle, however this will require significant disk space on the server. To instead delete the backups, see "Deleting Backups" below.

| Pros | Cons |
|---|---|
| <ul><li>The initial content and activities are already built for the incoming class.</li><li>This can be performed by teachers/tutors and is not necessarily reliant on one site administrator doing this for every course.</li><li>There is no server downtime.</li><li>There is only 1 single course instance available (tidier).</li></ul> | <ul><li>The old course instance is not live, and will need to be restored to access the old data.</li><li>Teachers will need course creation rights in a category to carry this out.</li><li>Significant effort required for every course and associated cost in time (based on the number of courses that need to be reset.)</li></ul> |

# Backing up a course

In order for a teacher (or administrator) to back up a course, you can access the course itself then navigate to the backup option. This option will appear in different places depending on your theme but it will always be available in the administration block within the course.
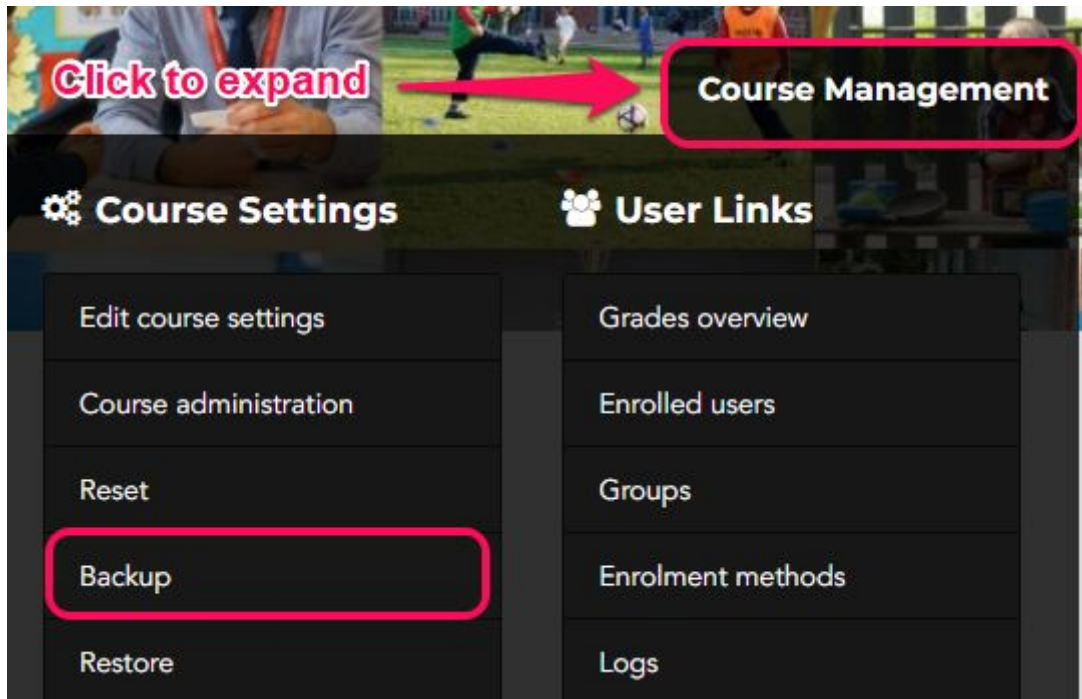


In many of our Titus themes you can click the *Course Management* tab as a teacher to reveal key course settings. From here click on *Backup*.

1. Initial settings ▶ 2. Schema settings ▶ 3. Confirmation and review ▶ 4. Perform backup ▶ 5. Complete

This process has 3 steps.

1) **Initial settings** - Choose whether to include enrolled users (only for admins), blocks, activities and resources etc. within the backup.

2) **Schema settings** - Select which activities and resources you wish to be included in the course backup.

3) **Confirmation and review** - Choose your backup filename and review the backup/schema settings chosen. Click the *Perform Backup* option. A message informing you that the backup is complete will appear. This may take a little time depending on the size of the course and the data you have selected to be part of the backup.

# Downloading a course backup

Once you've taken a backup you will be taken directly to the *Restore* area. If you are coming back at a later date to download a backup then access the *Restore* area directly (screenshot from Titus theme example).
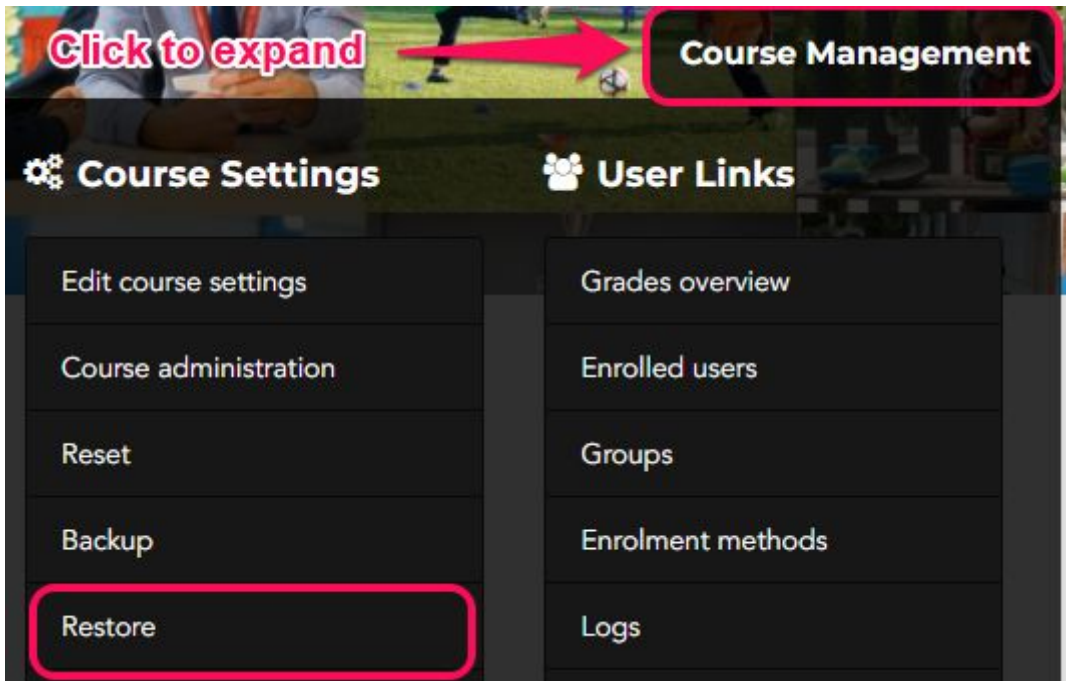


Once you're in the *Restore* area, you will see an area titled *User private backup area*. If you have automated course backups set up these would be visible under the *Course backup area* instead.

The backups you have taken directly, as the logged in user, will be shown here.



Clicking the *Download* button will simply download that backup file to your local machine.

# Deleting a course backup

Once a backup is taken by a user it will sit in the *User private backup* area taking up disk space on the server. These files can remain here but it is best practide to download then delete them. Within the *Restore* area is also a button to *Manage backup files*.



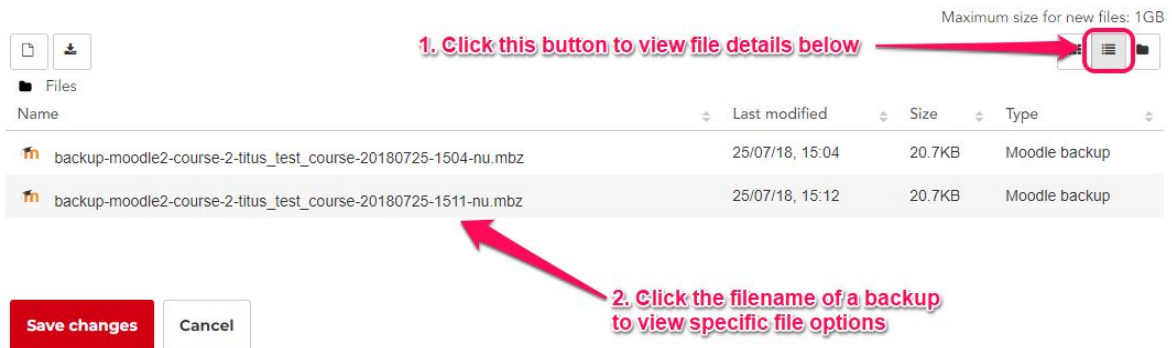By clicking this button you'll be taken to the *Files* area. Firstly, it is advisable to click the *Display* folder with file details option to see some information about the files here.



After selecting a backup by clicking the filename you will see a similar window to the following screenshot. You can also download the backup file from this popup or delete it by clicking the *Delete* button.

You will be asked to then confirm if you are sure you want to delete this file. Clicking *OK* will delete the backup file.

# Resetting courses

At the end of an academic year it is a good time to consider which courses are still required by performing a **course review**. Resetting allows you to empty a course of user data, while retaining the activities and other settings. Note that by doing this you will delete your chosen user data from this course permanently.

| Pros | Cons |
|---|---|
| • There is only one course.<br>• Permissions for teachers do not change.<br>• The initial content and activities are already built for the incoming class.<br>• The work can be outsourced to each teacher. | • Significant effort required for every course and an associated cost in time (based on the number of courses that need resetting).<br>• Students and teachers do not have live access to the prior instance of the module which may be desirable for a number of reasons. |

Resetting a course can be done manually by teachers for their own courses giving them control over what aspects are reset. They may choose to keep the user content from certain activities, for example a forum, a glossary or a database).

When going through these settings you can choose to unenrol students from this course.
**Note** that if you are using EduLink integration (or any MIS integration method) **you will need to unenrol users using the specified method** for that import method.

For EduLink/Wonde integration there will be a Moodle Block that can be used in the course to remove any linked groups from your MIS. See the EduLink section for more information on this.

# How to reset a course

To reset a course, you can access the course itself then navigate to the *Reset* option. This option will appear in different places depending on your theme but it will always be available in the administration block within the course.
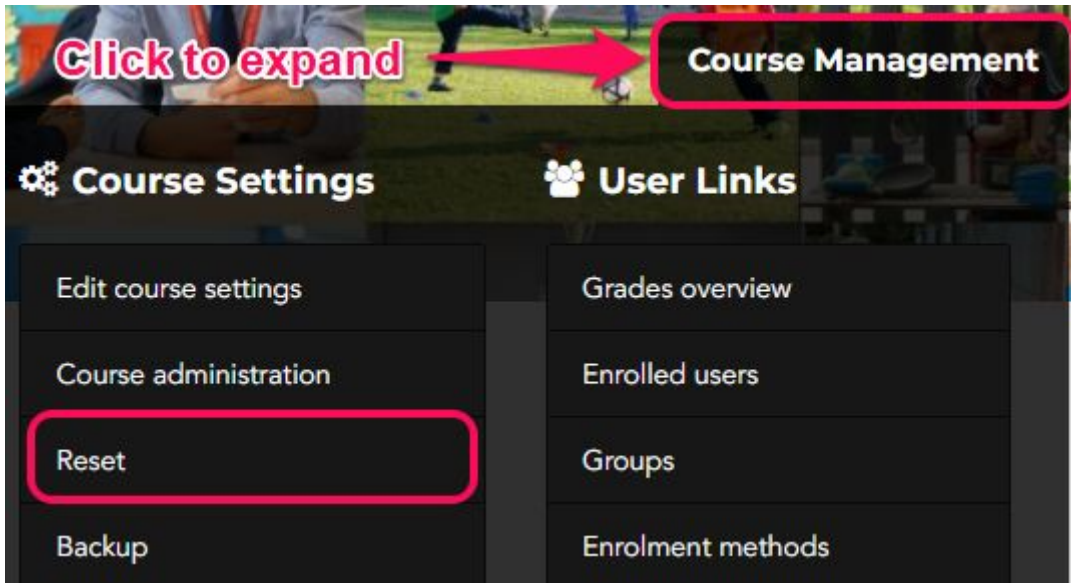


In the *Reset* area there are a number of important options to consider. You can choose to delete calendar events, completion data, gradebook items, groups and even more specific options regarding certain activity types. It's worth looking through these settings and selecting the checkboxes carefully for what information you'd like to delete. The different sections available can be seen in the following screenshot.

Once you've selected what you'd like to reset, you can then click the *Reset course* button to proceed. You will then see an overview screen informing you what has been reset. Clicking *Continue* will return you to the course home page.

## Reset course

| Component | Task | Status |
|---|---|---|
| General | Date changed | OK |
| General | Delete events | OK |
| General | Delete completion data | OK |
| Choices | Date changed | OK |
| Forums | Date changed | OK |
| Assignments | Delete all submissions | OK |
| Assignments | Date changed | OK |
| Assignments | Delete all submissions | OK |
| Assignments | Date changed | OK |
| Gradebook | Delete all grades | OK |

**Continue**

# EduLink integration

If you utilise the EduLink integration plugin to import data from your MIS then the following information applies and can be implemented on your platform.

## Using an effective date

At the end of the academic year you can run into a situation where, as the current date is now within the summer holidays, your MIS will return empty teaching groups etc.

When EduLink detects that you have reached the end of your academic year, it displays a notice to this effect on the Integrator block and automatically sets an **effective date** of the last day of the summer term (this date is pulled from your MIS).



In effect, you continue to see students and teaching groups etc as they were on the last day of term.

When the real date reaches the start of the new academic year, EduLink will automatically 'unstick' and start using the real date once more so that you now seedata from the new academic year.

## Rolling forward

If you want to see data from the new academic year during the holiday period you can roll forward into the new academic year. This should only be done if you are happy that all the MIS data from the new academic year is correct. On the EduLink Integrator block if you select *click here for information* on the notice, you will be shown the following:

## Viewing Notice: Academic Year End

Home ▶ Viewing Notice: Academic Year End

### Your academic year has ended.

During the summer holidays some functionality could potentially be lost as teaching groups etc may be empty, so an effective date of the last day of the summer term (22/07/2015) is now in use.

If you would prefer to work using an effective date in the next academic year, you can click this link to roll forward to the new academic year.

If you click the link shown above you will be shown a confirmation screen as follows.

## Academic Year Roll Forward

Home ▶ Tools ▶ Academic Year Roll Forward

### Are you sure you want to use an effective date in the next academic year?

The current academic year is from 03/09/2014 to 22/07/2015.

The system is currently using an effective date of 22/07/2015.

The system will be set to use an effective date of 03/09/2015.

⚠ **Please note:** using an effective date in the new academic year may result in the transfer crons disabling or removing parent, learner and employee accounts for learners / employees who will have left in the new academic year (e.g. current final year students).

Yes    No

Clicking the *Yes* button will set an effective date of the first day of the new academic year.

## Academic Year Roll Forward

Home ▶ Tools ▶ Academic Year Roll Forward

### New effective date of 03/09/2015 now in use

⚠ When the various transfer crons run again tomorrow, you are likely to see significant changes.

Continue

This new effective date will now be displayed at the bottom of the Integrator block.

**Notices**

Using effective date of 03/09/2015

Please note that when the roll forward functionality is utilised it will take some time for this to be reflected. This is because the effective date will be picked up overnight on the MIS Gateway server. Please contact us if you need this to happen sooner. Once the overnight builds have completed, the various Moodle crons will then be picking up data from the new academic year and accounts for learners, employees, parents will be transferred appropriately (see EduLink user manual).

# School leavers

It is worth noting that when a user is indicated as having left the organisation their account is placed in the *View leavers* screen. A leaver's account is still present on the system but cannot be used to log in.

By default the following setting is set to **On**.

| Run Delete Leavers as a Cron task | On |
| Deleted Leaver accounts life (days) | 60 |

*Run Delete Leavers as a Cron task* means that users of any kind who have left the school will have their Moodle accounts deleted after a specified time period has elapsed (see next setting). *Deleted Leaver accounts life* (days) specifies the amount of days a user's account is kept after their leaving date. Once this threshold has been exceeded their Moodle account will be deleted if *Run Delete Leavers as a Cron task* is set to On. The default setting for this is 60 days.

In order to view users in the leavers list click on *View Leavers* on the *EduLink Integrator* block.
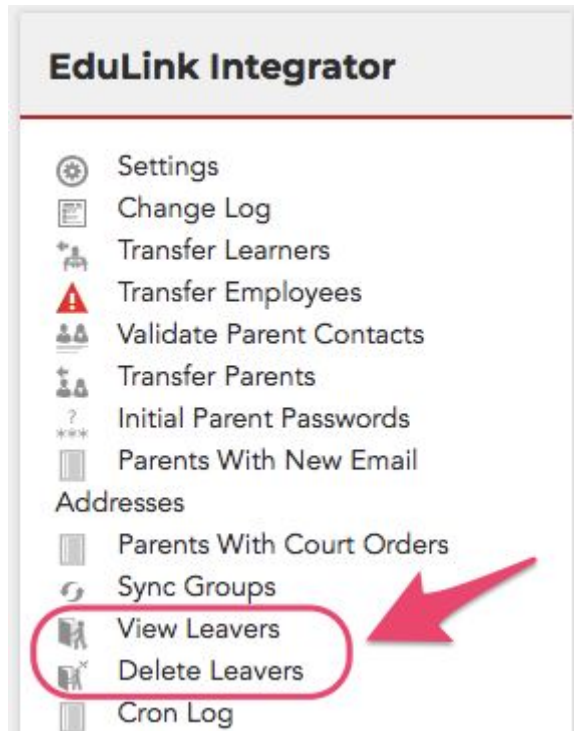
This report shows the leavers queue. Any accounts shown as *Queued* will be deleted by the *Delete Leavers* cron once they are older than the lifetime specified in your configuration. It will also show accounts that have already been deleted by this cron.



Alternatively on the EduLink Integrator block you can click *Delete Leavers* in order to run this process manually. This will check the leavers queue (learners, parents and employees that have been marked as having left – their Moodle accounts still exist but cannot be logged into) and delete any accounts in the queue once the specified lifetime has been exceeded. If there any queued accounts you can also choose to delete them immediately.

# New year processes

Once the new academic year has started you will likely require the correct teaching groups to be enrolled on your courses. This will happen automatically if the setting *Treatment of groups from previous academic years* is set to *Upgrade if possible, remove otherwise*. This is set by default.

You can unenrol/remove any teaching groups that have been imported via your MIS manually using the tools provided by this integration method at any point throughout the year (or perform this completely manually if no MIS integration is used).

# Removing user group enrolments

As stated, this should happen automatically but it is still worth noting this can be done throughout the year. When utilising MIS integration, you must ensure the relevant block is present on that course depending on the integration you have. Please note that the following screenshots are for EduLink integration.

In order to remove existing groups from your course, click *Remove Groups*.
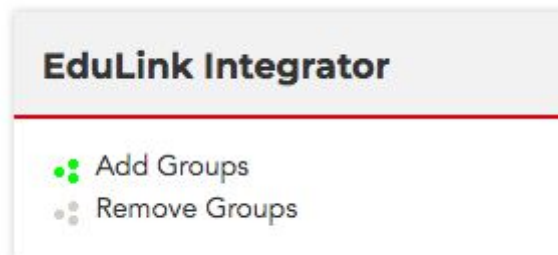


This will present you with the following popup where you can select any enrolled groups via this integration and select which groups to unenrol from this course.
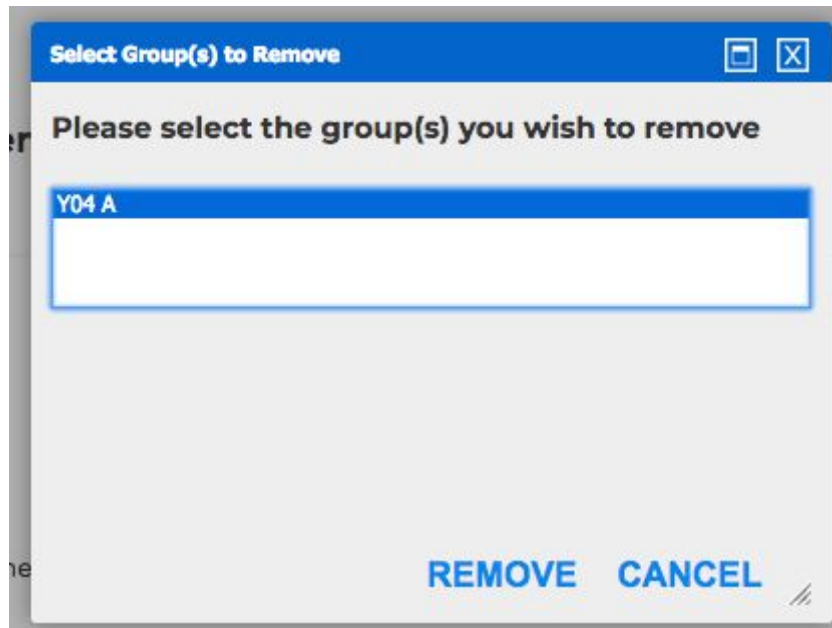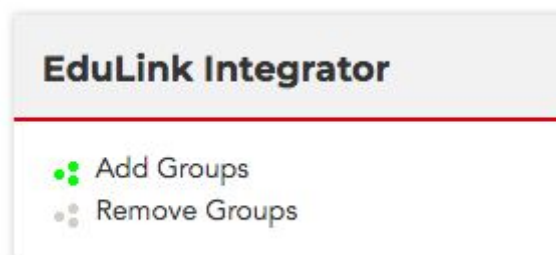
Clicking *Remove* will unenrol these groups and close this popup window.

# Enrolling new intake users

When the new academic year begins you will want to ensure that the correct users have been enrolled onto each course. On rare occasions this may be done via CSV import or even manually in the enrolled users/participants screen within the course. If however you use EduLink or Wonde integration then your user information along with their teaching groups will be imported into the system.

In order to enrol new users (via their teaching groups) onto the corresponding courses you must ensure the relevant block is present on that course depending on the integration you have. Please note that the following screenshots are for EduLink integration.

In order to add new groups from your MIS, click *Add Groups*.



This will present you with the following popup where you can navigate through the folder structure of imported groups and select which groups to enrol on this course.
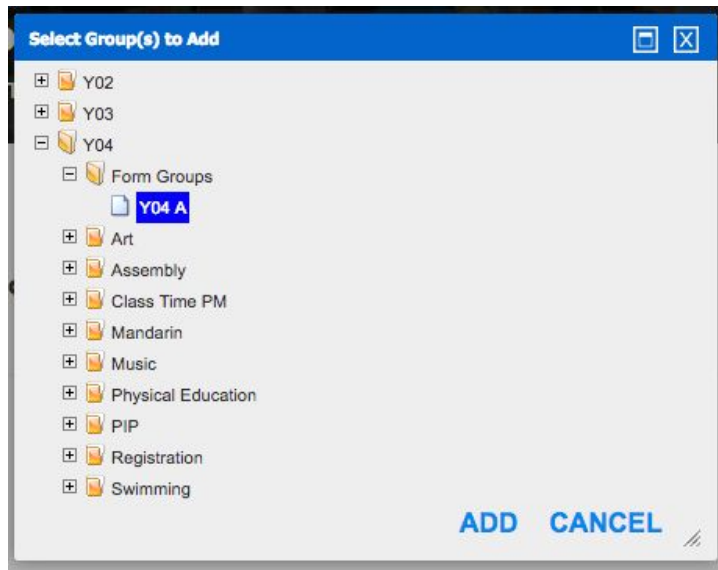
Clicking *Add* will enrol these groups and close this popup window.