Staff Role/Paper Associations

Tutorial

Using this Tool will NOT increase your workload but it WILL speed up the process.
Instead of a 2-3 day turn around, users that you add to papers in Moodle will have access OVER NIGHT

ITS SUPPORT SERVICES

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Authored by: ITS Support Team
Staff Role/Paper Associations

Tutorial

Introduction
With the upgrade of Moodle to 2.5 we have also upgraded the Moodle role tool and it is now called **Staff Role/Paper Associations** tool as it now covers numerous roles in Moodle which are also linked to other systems across the University.

**NEW**
There are other new features with the tool, look out for these marked with the star. They are **Quick Add** and **Bulk Upload**.

To access the tool

What roles can be added using this tool?
There are now several roles that can be added using this tool, they are separated into two main categories, **Teaching** and **Administration**. The **teaching roles** are; SP Teaching Convenor (this is the old Moodle Teacher), SP Teacher (this is the old Staff-Lecturer), SP Instructor, SP Student Support and the **administration roles** are; SP Non-Teaching Convenor, SP Staff Support, SP Teacher Support and SP Guest. For a more detailed explanation of roles please see Appendix 1.

Adding staff members to a paper
If you would like to add one or more staff members to a single Moodle paper then please follow the instructions and screenshots on Page 2 - 5.

Adding multiple papers to one staff member
If you would like to add one or more Moodle papers to a single staff member then please follow the instructions and screenshots on Page 5 onwards.

Helpful Tips and Advice
This Tool only allows the user to attach papers to staff members with current HR contracts. If a staff member is not appearing in the search list and you are sure that they have a current and valid HR contract then please contact the ITS Service Desk on Ext: 4008 so we can investigate this issue for you.

Please keep an eye on the delivery mode column that appears for papers. For papers to appear in Moodle they need to either show **On Campus/Supported Online** or **Fully Online**.
If you only see **On Campus** in this column, please contact the ITS Service Desk on Ext: 4008 with the full paper code so we can update this for you and have these papers appear in Moodle. See example below.

The tool allows you to search papers or staff using a wildcard character (*). When the results for papers exceed a total of four, the links will appear below the search results to allow you to scroll through them all. See example below.

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### NEW Quick Add

If you have numerous staff to add to numerous papers there is now a **Quick Add** function. This method is faster because it doesn’t need to search through the database.

Once the tool is open click the **Utilities** tab at the top of the screen.

1. Type in the full **Paper Occurrence Code** e.g. **ABCD123-13A(HAM)**
2. Type in the **Employee Number or Username**
3. Select the role required. See Appendix 1 for role descriptions.
4. Click the Add button and you’re done.

Adding staff members to a paper
Once the tool is open click the Contributions by Paper tab at the top of the screen.

1. Select the correct year from the drop-down.
2. Enter the seven digit paper code (e.g. COMP123) into the Paper Code field. You DO NOT need to enter the Occurrence Code.
3. Click Search.

All papers matching the code entered will appear in the right pane along with the delivery mode and the number of currently assigned staff to that paper.

4. Select the paper that you are adding the staff member to by clicking the button in the select column to the left of the paper shown in the search results.

Paper Occurrence Role Details, Add Staff Contribution and Existing Roles will now appear below.
5. If the staff member is already listed **DO NOT** add them because the role with lesser capabilities will prevail. You need to remove their current role first then add their new role. No staff member should have more than one role in any one paper.

6. Search for the staff member under **Add Staff Contribution** that you wish to add to this paper by typing their **Surname** in the **Surname (required)** field.

**NOTE:** Surnames are required and this tool uses their legal name plus any preferred names that have been registered with HR e.g. if their legal name is Robert Smith, yet they prefer to use Rob Smith then you will need to search for them by putting Smith in the **Surname** field and Rob in the **Other Names** field. However, just searching by surname will bring up a list to choose from after a short delay. You will be able to confirm the correct staff member you are searching for as both their staff username and latest HR contracted department will also appear in this list.

You **do not** need to fill in the **Contact Hours** field, this will be done by the staff member themselves as part of the yearly ASP process.

7. Click the **Find** button.
8. Select the role required from the **Role** dropdown (see Appendix 1 for role descriptions).
9. Click the **Add** button. This will add them to the selected paper, this takes between 2 – 5 seconds to complete this process so please be patient. They will then appear in the **Existing Roles** section.

If you have accidentally added the wrong staff member, you can remove them by using the **Remove** button on their entry in the **Existing Roles** section.

10. You can now repeat this process for any other staff members you wish to add to this paper.

**NOTE:** Each night, this tool will collect all of the entered details and update Moodle with these changes so that the staff member will have access to the Moodle paper with the role selected the following day.

**Adding multiple papers to one staff member**

To add one or more Moodle papers to a single staff member;

1. Click the **Contributions by Person** tab at the top of the screen.

Adding papers is done in a similar manner to adding multiple staff to one Moodle paper however this time you start by searching for the staff member you want to add the papers to.

2. Search for the staff member you wish to add to this paper by typing their **Surname** in the **Surname (required)** field.
3. Click the **Search** button.
4. Select the staff member by clicking the **button** in the select column to the left of their name shown in the search results on the right pane, be sure to select the correct staff member.

Below you will now see **Person Role Details** and **Add Paper Contribution**.

5. Select the correct **year** from the drop-down.

6. Enter the seven digit paper code (e.g. COMP123) into the **Paper Code (required)** field.

7. Click the **Find** button.

You **do not** need to enter the Occurrence Code at all.

8. When the list of papers appears, check for the correct paper and from the **Role** dropdown select the role required.

9. Click the **Add** button.

This will add the staff member to the selected paper, it takes between 2 – 5 seconds to complete this process, so please be patient. They will then appear below, in the **Existing Roles** section.
NOTE: Each night, this tool will collect all of the entered details and update Moodle with these changes so that the staff member will have access to the Moodle paper with the role selected the following day.

**NEW** Bulk Upload

The **Bulk Upload** feature will enable you to upload multiple staff members to paper occurrences from one .csv (excel) file all at once.

**Entering data required**

1. Download the template provided in the tool under the **Utilities** tab to avoid any errors.
**DO NOT** make any changes to Row 1, this is the Header row and must stays as is.

Fill in the data fields as required, you can use as many rows as you need using the following conventions;

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
<tr>
<td>1</td>
<td>PAPER_OCC_CODE</td>
<td>USER_NAME</td>
<td>ROLE</td>
</tr>
<tr>
<td>2</td>
<td>comp223-13B(ham)</td>
<td>mmason</td>
<td>teacher conv</td>
</tr>
<tr>
<td>3</td>
<td>comp221-13B(ham)</td>
<td>mmason</td>
<td>teacher</td>
</tr>
</tbody>
</table>

**Data fields – commencing on Row 2**

2. Type in the data under Paper Occurrence Code (PAPER_OCC_CODE), Username (USER_NAME) and Role (ROLE) as above

**NOTE:** You can leave out the *sp* (*staff paper*) and you can shorten *convenor* to *conv* in the Role data field e.g. teacher conv if you choose.

3. Save the excel file as a .csv file format by clicking the **Save as type** dropdown and selecting **CSV (Comma delimited)** and click **Save**, see below

4. An information window will now pop-up and you must select **Yes**
Uploading the CSV file

1. Select the **Utilities** tab
2. From the **CSV File Upload** pane select **Choose File**
3. Find and select the file you have saved as a .csv file and click **Open**
4. Click **Upload**

5. You should now see the data you have uploaded, once you are satisfied that it is correct click **Import**.
APPENDIX 1:

Understanding the new roles

The new names for the roles in this tool are to fit with Jade SMS, so you can understand how the new role names fit with Moodle here is a table to explain;

<table>
<thead>
<tr>
<th>New role name</th>
<th>Moodle role name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP Teacher Convenor</td>
<td>Moodle teacher</td>
</tr>
<tr>
<td>SP Teacher</td>
<td>Co-teacher</td>
</tr>
<tr>
<td>SP Instructor</td>
<td>Marking tutor</td>
</tr>
<tr>
<td>SP Student Support</td>
<td>Non-marking tutor</td>
</tr>
</tbody>
</table>

The Non-teaching roles (Administration) are based on the roles above but have fewer capabilities as described below.

<table>
<thead>
<tr>
<th>New role name</th>
<th>Moodle role name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP Non-Teacher Convenor</td>
<td>Moodle teacher</td>
</tr>
<tr>
<td>SP Teacher Support</td>
<td>Co-teacher</td>
</tr>
<tr>
<td>SP Guest</td>
<td>Student support</td>
</tr>
</tbody>
</table>

Teaching roles:

**SP Teaching Convenor**

Present classes or give lectures and is responsible for the development of the paper outline, coordination, and organisation of the paper in general.

- Has access to Moodle and is able to edit paper material, import and assign roles.
- Has the option to request an appraisal for the paper and is able to opt-out on behalf of other staff members in the paper.
- The paper will be displayed on his/her ASP and PGS automatically.

**SP Teacher**

Present classes or give lectures.

- Has access to Moodle and is able to edit paper material and import; cannot assign roles.
- Has the option to opt-out from his/her own teaching appraisal.
- The paper will be displayed on his/her ASP and PGS automatically.

**SP Instructor**

Generally does not present classes or give lectures, although he/she may do occasionally. Provides support in the classroom or labs.

- Has access to Moodle, but cannot edit paper material or import; can mark assignments.
Has the option to opt-out from his/her own teaching appraisal.
The paper will be displayed on his/her ASP and PGS automatically (if a fulltime staff member).

**SP Student Support**
This role is similar to the SP Instructor role but it has less access.
- Has access to Moodle, cannot edit paper material, import or mark assignments.
- Has the option to opt-out from his/her own teaching appraisal.
- The paper will be displayed on his/her ASP and PGS automatically (if a fulltime staff member).

**Non-Teaching roles:**

**SP Non-Teaching Convenor**
Performs the same or similar actions as a SP Teaching Convenor but does not deliver lectures.
- Has access to Moodle and is able to edit paper material, import and assign roles.
- No appraisals are run for this role.
- The paper is not used on his/her ASP or PGS.

**SP Teacher Support**
Provides support to teaching staff.
- Has access to Moodle and is able to edit paper material and import; cannot assign roles.
- No appraisals are run for this role.
- The paper is not used on his/her ASP or PGS.

**SP Guest**
Minimal access.
- Has access to Moodle, can't edit paper material, import or mark assignments.
- No appraisals are run for this role.
- The paper is not used on his/her ASP or PGS.