

Totora User Conference 2019

Case Study
Audience Based Visibility

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vtnz



DEKRA

Outline

- Discussion
- VTNZ Case Study
- Questions



Discussion

- What do you currently know about Audience Based Visibility (ABV)?
- Why do/would you use it?
- How do you currently use it?
- Questions about ABV



Case Study – Why?

THE CHALLENGE

- Need an LMS for other business units in new Dekra Area
- LMS needed to be administered in NZ
- No budget to have a separate instance(s)
- Employees loyal to current VTNZ branding
- No extra \$\$\$

Case Study – What?

Areas of Focus for today:

- Theme Selection
- Dashboard Configuration
- Course Assignment

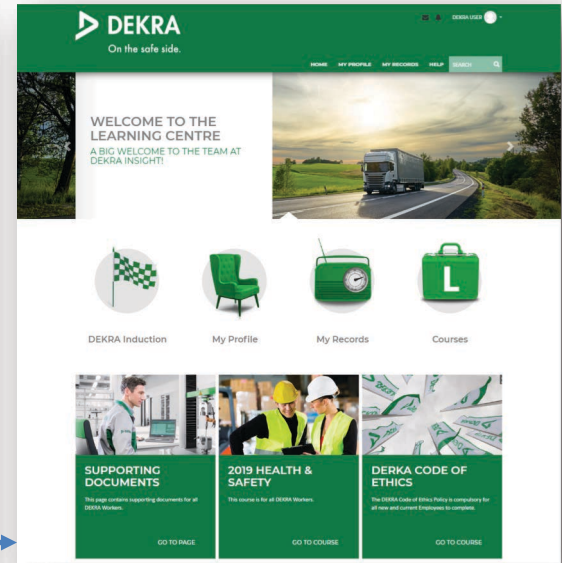
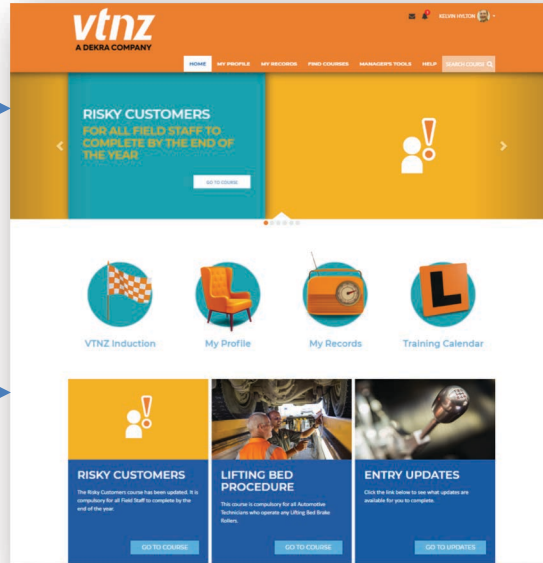
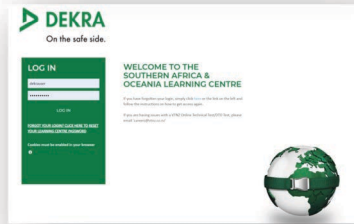
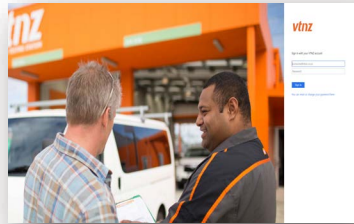
Other areas to consider:

- Reporting



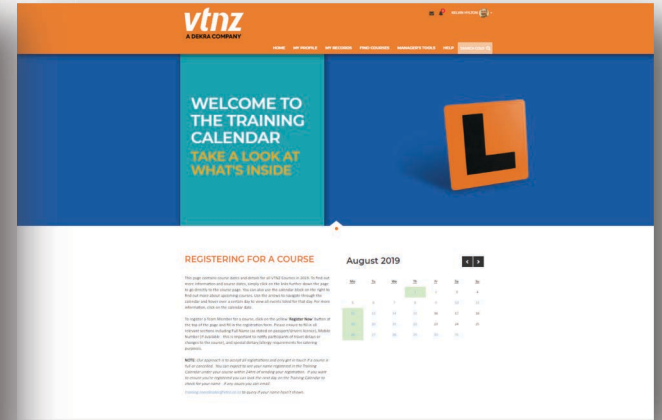
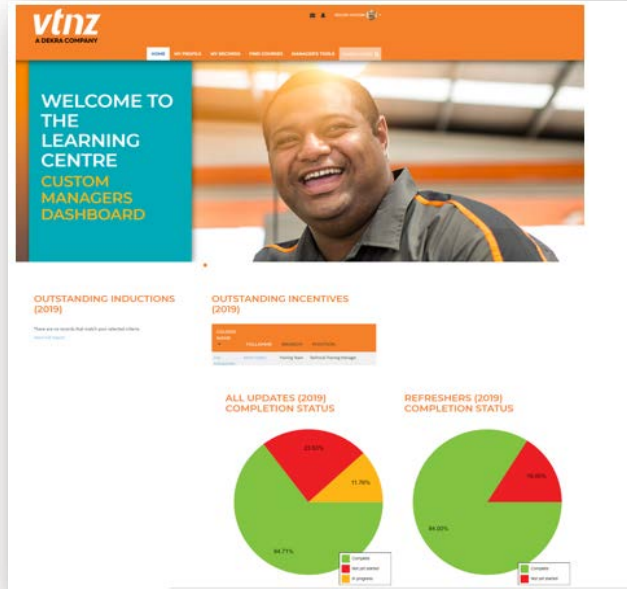
Case Study – What?

Theme based delivery based on the audience



Case Study – What?

Dashboards for specific audiences



Theme Case Study – How?

1. Get the plugin

https://moodle.org/plugins/local_profiletheme

2. Make the theme

▼ Appearance

▼ Themes

⚙ Theme settings

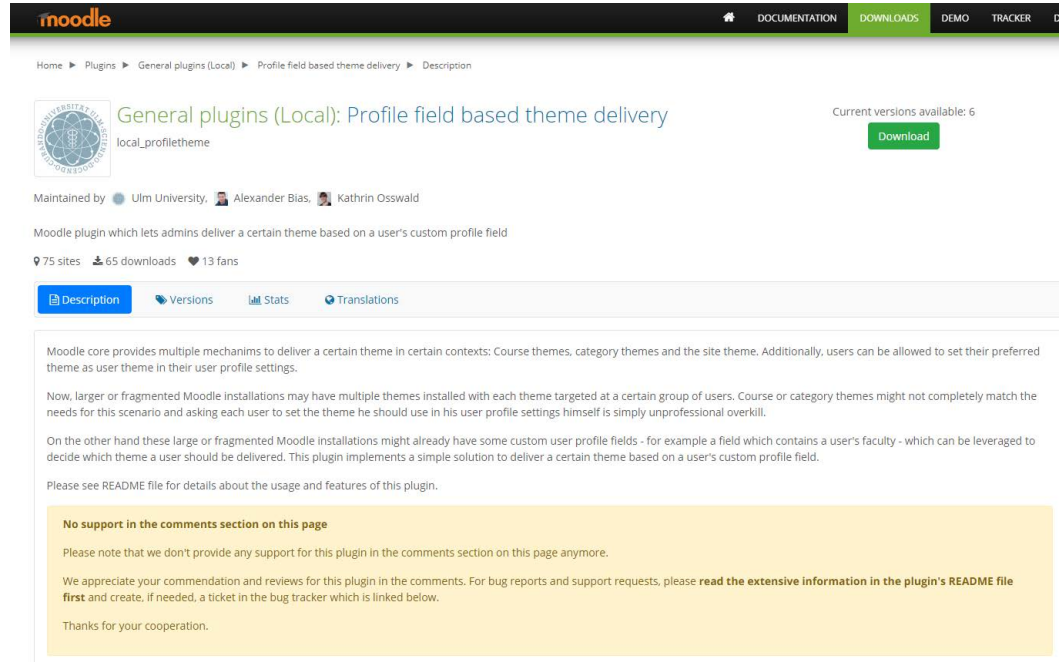
⚙ Theme selector

⚙ Element Library

⚙ Basis

▶ VTNZ Self Service Theme

▶ DEKRA Self Service Theme



The screenshot shows the Moodle.org plugin page for 'General plugins (Local): Profile field based theme delivery'. The page includes a navigation bar with 'moodle' logo and links for 'DOCUMENTATION', 'DOWNLOADS', 'DEMO', and 'TRACKER'. The breadcrumb trail is 'Home > Plugins > General plugins (Local) > Profile field based theme delivery > Description'. The plugin title is 'General plugins (Local): Profile field based theme delivery' with the ID 'local_profiletheme'. It is maintained by 'Ulm University', 'Alexander Bias', and 'Kathrin Osswald'. The description states: 'Moodle plugin which lets admins deliver a certain theme based on a user's custom profile field'. It shows 75 sites, 65 downloads, and 13 fans. There are tabs for 'Description', 'Versions', 'Stats', and 'Translations'. The main content area contains a detailed description of the plugin's purpose and a yellow warning box stating: 'No support in the comments section on this page'. The warning box text reads: 'Please note that we don't provide any support for this plugin in the comments section on this page anymore. We appreciate your commendation and reviews for this plugin in the comments. For bug reports and support requests, please read the extensive information in the plugin's README file first and create, if needed, a ticket in the bug tracker which is linked below. Thanks for your cooperation.'

Theme Case Study – How?

3. Enable the theme selection

Site Administration > Users > Accounts > User Profile Fields



Site Administration > Users > Accounts > Profile field based theme delivery

The screenshot shows the 'THEME' configuration interface. At the top, there are icons for settings, delete, and refresh. Below that, a header bar indicates 'PROFILE FIELD' with an 'EDIT' button. The main area shows a 'Theme' dropdown menu. At the bottom, there is a section for 'Specific settings' with a 'Menu options (one per line)' text area containing 'VTNZ Self Service Theme' and 'DEKRA Self Service Theme', and a 'Default value' dropdown set to 'VTNZ Self Service Theme'. 'SAVE CHANGES' and 'CANCEL' buttons are at the bottom.

The screenshot shows the 'PROFILE FIELD BASED THEME DELIVERY' configuration page. It has buttons for 'View / edit rules' and 'Add new rule'. A descriptive text explains that rules map custom user profile field values to themes. There are two rule entries: the first rule matches 'DEKRA Self Service Theme' and is moved to position 1; the second rule matches 'VTNZ Self Service Theme' and is moved to position 2. Each rule has a 'Delete this rule' checkbox. 'SAVE CHANGES' and 'CANCEL' buttons are at the bottom.

Theme Case Study – How?

4. Create the audience

- VTNZ Theme – RULESET: Profile field IS VTNZ Self Service Theme
- DEKRA Theme – RULESET: Audience IS NOT VTNZ Theme

VTNZ THEME

Overview	Edit details	Rule sets	Members	Enrolled learning	Visible learning	Learning Plan	Assign Roles
Type	Dynamic						
Id	VTNZ_THEME						
Description	This Audience is to capture all those who have the 'Theme' profile field: VTNZ Self Service Theme. This will then be used to control: <ul style="list-style-type: none">• Overall Theme• Home Page Dashboards• Course Catalogue Restrictions• Perhaps Reporting						
Members	1255						

DYNAMIC AUDIENCE CRITERIA

Membership criteria	<ul style="list-style-type: none">• Ruleset #1<ul style="list-style-type: none">◦ User's "Theme" is equal to "VTNZ Self Service Theme"
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DEKRA THEME

Overview	Edit details	Rule sets	Members	Enrolled learning	Visible learning	Learning Plan	Assign Roles
Type	Dynamic						
Id	DEKRA_THEME						
Description	This audience is dynamic with rulesets to define who sees: <ul style="list-style-type: none">• Themes• Dashboards• Categories (with the associated courses)• Reports						
Members	6						

DYNAMIC AUDIENCE CRITERIA

Membership criteria	<ul style="list-style-type: none">• Ruleset #1<ul style="list-style-type: none">◦ User is NOT a member of any of these audiences: "VTNZ Theme (VTNZ_THEME)"
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Theme Case Study – How?

5. Create the Home Page Dashboards and assign audiences

Site Administration > Appearance > Navigation > Default home page for users

NAVIGATION

Default home page for users
defaulthomepage

Totara dashboard

Default: Totara dashboard

This determines the home page for logged in users

Allow default page selection
allowdefaultpageselection



Default: Yes

Allow users to select their default page - it can be the Home page or their Dashboard.



MANAGE DASHBOARDS

CREATE DASHBOARD

NAME	AVAILABILITY	OPTIONS
VTNZ Homepage Layout	Assigned to 1 audiences	
DEKRA Homepage Layout	Assigned to 1 audiences	
VTNZ My Learning	Assigned to 1 audiences	
DEKRA My Learning	Assigned to 1 audiences	
VTNZ Training Calendar	Assigned to 1 audiences	
VTNZ Technical Support	Assigned to 1 audiences	
DEKRA Technical Support	Assigned to 1 audiences	
Manager Report	Available to no users	

Theme Case Study – How?

6. Use Custom Access Rules to ensure the correct dashboard is visible

- ▼ Appearance
 - Themes
 - ⚙️ Calendar
 - ⚙️ Blog
 - ⚙️ Navigation
 - ⚙️ **Main menu**
 - ⚙️ HTML settings
 - ⚙️ Documentation
 - ⚙️ Default profile page
 - ⚙️ Dashboards
 - ⚙️ Courses
 - ⚙️ AJAX and Javascript
 - ⚙️ Manage tags
 - ⚙️ Additional HTML

MAIN MENU

ADD NEW MENU ITEM

ITEM TITLE	DEFAULT URL ADDRESS	VISIBILITY	EDIT
Home	/totara/dashboard/index.php?id=5	Use custom access rules	⚙️ 👁️ ↓ ×
Home	/totara/dashboard/index.php?id=7	Use custom access rules	⚙️ 👁️ ↑ ↓ ×
My Profile	/user/profile.php	Show	⚙️ 👁️ ↑ ↓ ×
My Records	/totara/plan/record/courses.php?	Show	⚙️ 👁️ ↑ ↓ ×
Summary	/totara/dashboard/index.php?id=6	Use custom access rules	⚙️ 👁️ ↓ ×
Summary	/totara/dashboard/index.php?id=8	Use custom access rules	⚙️ 👁️ ↑ ↓ ×
Record of Learning	/totara/plan/record/index.php	Show when required	⚙️ 👁️ ↑

Theme Case Study – How?

7. Course Visibility

• Check course completions

COURSE AND CATEGORY MANAGEMENT

Viewing: Course categories and courses ▾

ADD A SUBCATEGORY MANAGE PROGRAMS IN THIS CATEGORY MANAGE CERTIFICATIONS IN THIS CATEGORY

Search courses

Site Administration > Courses > Course default settings

COURSE DEFAULT SETTINGS

Visible

moodlecourse | visible

This course is not available to students ▾

Default: This course is available to students

Audience-based visibility

moodlecourse | visiblelearning

Enrolled users and members of the selected aud ▾

Default: All users

Default visibility option when the site-wide audience-based visibility setting is enabled



Questions



Totora User Conference 2019

Case Study
Audience Based Visibility

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