

# User Guide

## Moodle-SAMIS Grade Transfer Tool (Moodle Assignments)



CENTRE FOR  
**LEARNING  
& TEACHING**

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# Introduction

The following guidance documents the processes required in order to make use of the automated transfer of marks from Moodle Assignment/Moodle Quiz to their equivalent assignment in SAMIS.

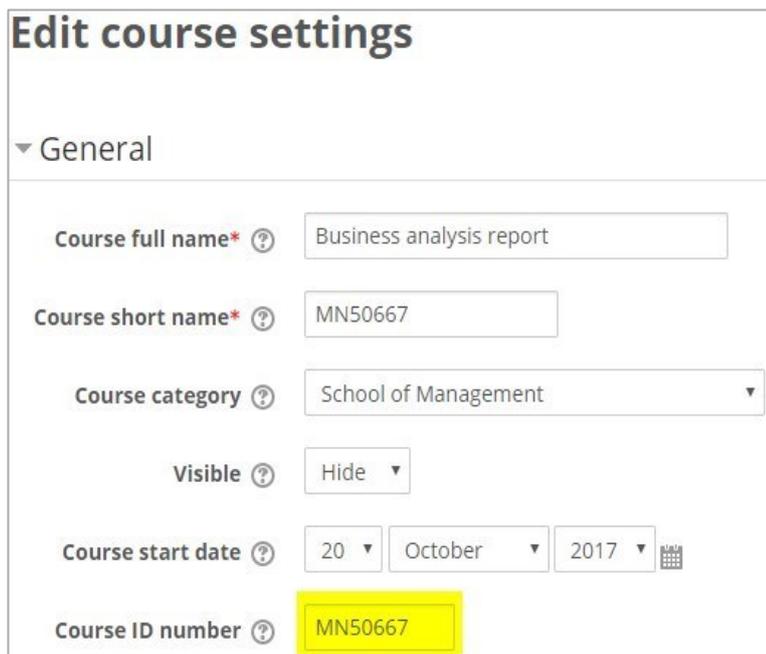
This guidance does not cover the process of marking a Moodle assignment, rather it assumes that grades have already been entered into the 'Grade' field, and after the appropriate checks have been made, are now awaiting transfer to SAMIS.

**The Grade Transfer functionality is offered as an alternative to the existing manual transfer of grades into SAMIS.** There is no expectation that staff should use this functionality, however it is hoped that they will find the automated transfer to be quicker and more accurate than existing manual processes.

# Caveats and Responsibilities

## Caveats

The Moodle Course ID number (located in the course settings) is extremely important as it defines which SAMIS cohort you will be able to transfer grades to.



The image shows a screenshot of the 'Edit course settings' page in Moodle. The 'General' section is expanded, showing several fields: 'Course full name\*' with the value 'Business analysis report', 'Course short name\*' with 'MN50667', 'Course category' set to 'School of Management', 'Visible' set to 'Hide', and 'Course start date' set to '20 October 2017'. The 'Course ID number' field, which contains 'MN50667', is highlighted with a yellow background. Each field has a question mark icon for help.

Figure 1: Course ID number defines the link with SAMIS

**Note:** Only Moodle courses with a valid SAMIS code will be able to connect to SAMIS for the purpose of transferring grades. Additionally, where staff have chosen to teach more than one cohort together, only the grades associated with the cohort identified by the Moodle Course ID number will be eligible for automatic transfer.

Please contact the Technology Enhanced Learning (TEL) team (via [tel@bath.ac.uk](mailto:tel@bath.ac.uk)) for advice on how to set up your assessments in a way that is compatible with grade transfer.

Other requirements include the following:

- ✓ There is one-to-one relationship between a Moodle Assignment/Quiz and an assessment item in SAMIS. This means that the granularity of assessment items in SAMIS should match the granularity of assessed items in Moodle (e.g. if you have three Moodle assignments for which summative grades are being allocated, and you wish to transfer these grades into SAMIS, there should also be three corresponding assessment items in SAMIS into which the grades can be transferred).
- ✓ The Moodle Assignment/Quiz must be marked out of 100
- ✓ Moodle anonymity must be lifted before marks can be transferred
- ✓ The functionality does not support the use of SAMIS assessment groups (the use of group assignments in Moodle is supported however).
- ✓ Data transfer is one way (from Moodle to SAMIS) and will only take place once. Once data has been transferred, it cannot be overwritten via the Moodle transfer process

## Responsibilities

Given the importance of ensuring that grade data held in SAMIS is accurate, access to the Grade transfer functionality will be restricted to the unit convenor for individual units.

It is the responsibility of the unit convenor to assure themselves of the accuracy of the grade data before instigating a transfer. They are also responsible for reviewing the resulting transfer report in order to check that the transfer has been completed satisfactorily. This is in line with existing processes where the unit convenor has responsibility for ensuring assessment marks are correct.

The unit convenor information is taken directly from SAMIS, so care should be taken to ensure that this field is updated when changes in course ownership occur. Speak to Faculty/School administrative staff about changing the unit convenor in SAMIS if this is incorrect. Staff with permission to transfer grades will be given an enhanced role in Moodle, that of 'Teacher+'. Staff with normal 'Teacher' access will not be able to transfer grades.

**Note:** *Once data has been transferred to SAMIS it cannot be overwritten by Moodle - this is to minimise the likelihood of SAMIS data being inadvertently changed. This means that once data has been transferred, any subsequent changes that may be required will need to be made directly in SAMIS (and possibly reflected in Moodle by manually updating the assignment grade).*

## Preparing for Grade Transfer

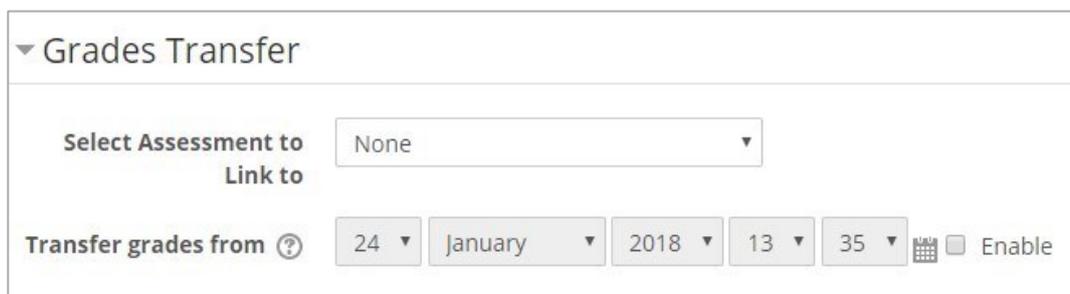
This following assumes a basic level of Moodle knowledge and does not therefore go into detail regarding the creation of a Moodle Assignment/Quiz activity. Instead it focusses on the settings that are relevant to the Grade Transfer functionality.

As mentioned previously, anyone listed as a unit convenor for a unit will automatically be given a new, enhanced role within Moodle (known as 'Teacher+').

Anyone with 'Teacher+' permissions will be able to see and interact with the Grade Transfer settings which can be found amongst the more familiar Assignment settings.

These settings can be applied at any point – either when the assignment submission point is first created or later, in advance of any transfer.

**Note:** *It is not possible to link more than one Moodle assignment to a single assessment item in SAMIS. Additionally, and as soon as one or more grades have been transferred to SAMIS, this setting will become 'locked' – preventing it from being changed. Should it need to be 'unlocked' again, please contact the TEL team (via [tel@bath.ac.uk](mailto:tel@bath.ac.uk)).*



The screenshot shows the 'Grades Transfer' settings in Moodle. It features a dropdown menu for 'Select Assessment to Link to' currently set to 'None'. Below this is a date selection interface for 'Transfer grades from', with fields for day (24), month (January), year (2018), and time (13:35). A calendar icon and an 'Enable' checkbox are also visible.

Figure 2: Grade Transfer settings (found in the Assignment/Quiz settings)

1. In the 'Select assessment to link to' drop down box, you will see a list of the assessment items (found in SAMIS) for this cohort.



The screenshot shows a form titled 'Grades Transfer'. It contains a dropdown menu labeled 'Select Assessment to Link to' with a list of options: 'None', 'None', and 'MN50667 Coursework ( Wt: 100% )'. The third option is highlighted in blue. Below the dropdown is a section labeled 'Transfer grades from' with a help icon. To the right of this section are four dropdown menus for date selection: '24', 'January', '2018', and '13'.

Figure 3: Assessment items listed are derived from SAMIS

2. Select the relevant assessment item
3. Save and return to course

**Note:** It is important that the SAMIS assessment items have been given meaningful names in order that they can be differentiated between. This is also important as this appears on a student's Record of Assessment at the end of their degree programme. Should there be any concerns about the naming of these assessment items, staff should speak with their Faculty/School administrators for support.

### Scheduling a transfer (optional)

Whilst we would recommend that staff instigate grade transfer manually (only after it has been confirmed that all of the grades are present and accurate), we recognise that there may be occasions where staff would like to schedule transfer of grades.

1. In the 'Select assessment to link to' drop down box, select the relevant SAMIS assignment.
2. In the 'Transfer grades from' setting, put a mark into the 'Enable' check box *This enables a transfer date to be entered*

▼ Grades Transfer

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Select Assessment to Link to

Transfer grades from        Enable

Figure 4: Scheduling a transfer

3. Enter an appropriate date and time for the transfer to take place.
4. Save and return to course

**Note:** You need to be absolutely sure that your grades are going to be complete and accurate at the time and date specified. If you have any doubts as to whether this will be the case, do not schedule the transfer, but instigate it manually at an appropriate time.

If you do choose to schedule transfer of grades, please note although data will be sent to the queue at the specified time, data transfer will take place during the next transfer ‘slot’ (currently running every hour). During particularly busy periods, the transfers may take longer – it is important to bear this in mind when selecting an appropriate transfer date.

# Instigating Grade Transfer

Unless you have previously scheduled a transfer of grades to SAMIS, you will need to manually instigate the process.

1. On the main course page, locate the 'Grades' item in the NavDrawer – found on the left hand side of the screen (highlighted in Figure 5).

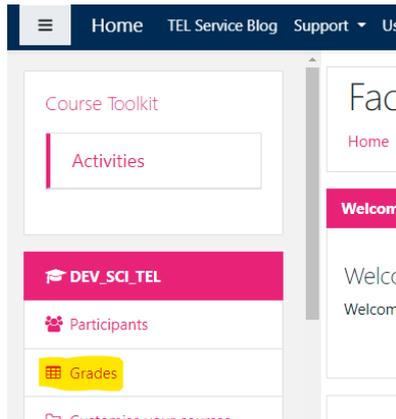


Figure 5: Grades item in the NavDrawer

2. Once you've done this, the 'Grader report' screen will appear – it has a drop down menu at the top containing many of Moodle's reports – click onto the drop down list and select 'Grade transfer' report.
3. From the Grade transfer screen (Figure 6), select the SAMIS assessment item into which you wish to transfer the grades. If the appropriate item does not appear in the list, make sure you have linked your assignment to it (as shown in figure 3).

Grade transfer

## Grade transfer

Only mapped assessments are listed

SAMIS assessment Name

Transfer status

Figure 6: Grade transfer screen

Once you have pressed the 'View' button, you will see a summary screen alongside a list of the SAMIS cohort alongside the grades that they have achieved.

At this point, you can instigate manual transfers in one of three ways:

1. Transfer all grades at once by pressing the green 'Transfer All' button

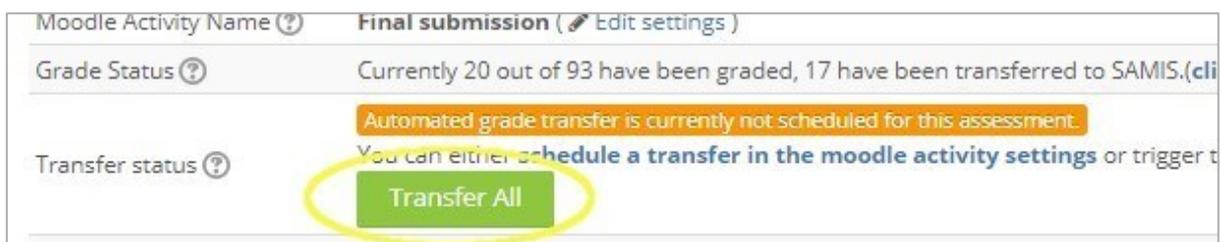


Figure 7: Transfer all grades at once

2. Transfer a single grade by pressing the green 'Transfer grade' that appears in the Transfer log (to the right of each record in the table)
3. Transfer multiple records by selecting them via the check boxes and then (at the bottom of the screen) selecting 'With selected users... Transfer grades'

When you transfer a grade manually, it will take you to a confirmation screen (as in the example below):

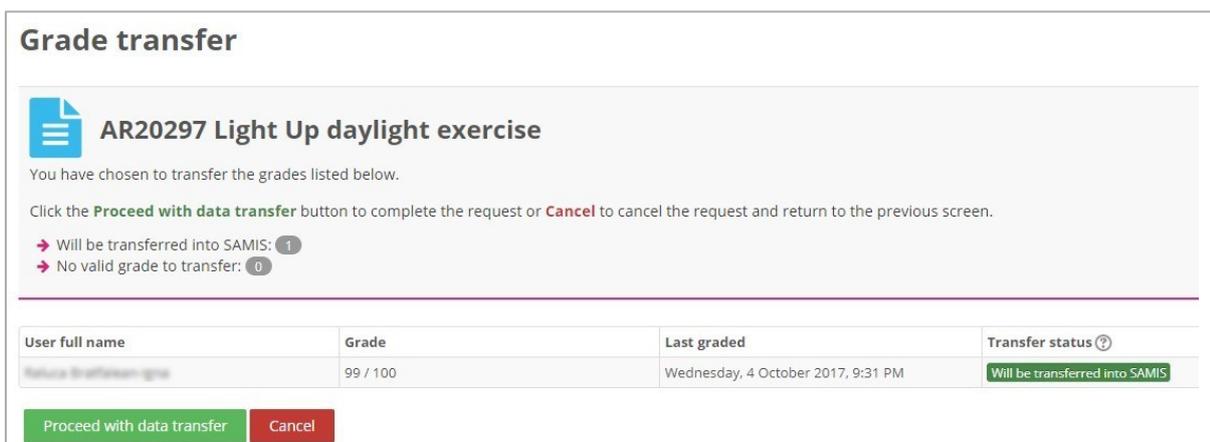


Figure 8: Transfer confirmation screen

Once you progress from the confirmation screen (i.e. Press the 'Proceed with data transfer' button), the grade data will be transferred into a queue.

It is difficult to estimate how long data will take to be transferred from the queue into SAMIS since much depends upon the amount of data that is in the queue at any given time, nevertheless Moodle will process batches of data every minute until all items have been transferred. For this reason, we would recommend that transfers are instigated well in advance of any deadlines.

It is important to return to the Grade transfer report later in order to see any change in grade transfer status and identify any problems that may have occurred.

Select	User picture	First name / Surname	Grade	Last graded	Transferred grade	Transfer status	Transfer
<input type="checkbox"/>		Sam Phisoa	20 / 100	Friday, 26 January 2018, 9:13 AM		Not transferred yet	Transfer grade
<input type="checkbox"/>		Brandon Bala	85.7 / 100	Tuesday, 23 January 2018, 9:11 AM		Only grades that are whole numbers can be transferred	
<input type="checkbox"/>		Agneta Ngwenyane Chingang	64 / 100	Monday, 22 January 2018, 6:27 PM	64	Transferred on Tuesday, 23 January 2018, 8:30 AM	
<input type="checkbox"/>		Francis Bala	65 / 100	Monday, 22 January 2018, 6:27 PM	65	Transferred on Tuesday, 23 January 2018, 8:29 AM	
<input type="checkbox"/>		Maria Winkler Marwane	7 / 100	Monday, 22 January 2018, 6:27 PM		Grade already exists in SAMIS Tuesday, 23 January 2018, 8:31 AM	

Figure 9: Transfer log showing a range of status messages

Final confirmation of transfer should be done by reviewing SAMIS directly. SAMIS is considered the definitive record of student results.



V1.3  
*Last Updated: 16/12/2021*

