

# Moodle User Guide for Management of Training for Patent Examiners

---

## Table of Contents

1. Introduction .....	2
What is Moodle? .....	2
Before We Start – for administrators .....	2
2. Setting up the front / home page .....	4
Front Page Settings .....	6
Appearance Settings .....	7
3. User Profile Settings .....	9
Hiding Unused Default User Profile Fields .....	9
Creating New User Profile Category .....	12
Creating New User Profile Field .....	14
Adding Users .....	20
Extracting Data of Users .....	20
4. Roles in Moodle .....	27
5. Competency Frameworks .....	30
For Administrators: Setting up Competency framework .....	30
For Managers / teachers: create learning plan templates .....	32
For Users / Trainees / Examiners: Viewing own Learning Plan .....	43
6. Creating a Course .....	46
Self-Assessment .....	46
Extracting Data from the Course .....	48
7. Creating a Quiz / Feedback in Moodle .....	53
8. Importing a Course to Moodle .....	54
Adding a Category / create new category .....	54
Importing / Restoring a Course .....	56
Adding / Modifying competencies of a Course .....	63
Enrolling a User to a Course .....	63
9. Reports in Moodle .....	67
10. Reviewing Competencies .....	67
Viewing report and giving rating of enrolled users .....	67
For Users: Submitting Evidence of Prior Learning .....	71
For Teachers / Managers: Reviewing evidence of prior learning .....	75
11. Workarounds in Moodle .....	79
Compiling Data of examiners .....	79
Creating a New Course .....	79
Creating Similar Courses for Previous Years .....	88
Match Competencies of a user and a course .....	93
Using Plugins .....	95
Match Course with user profile fields .....	95

Course Prerequisites..... 104  
Upload Files in User Profile..... 114  
Monitoring of Learning Plans ..... 118

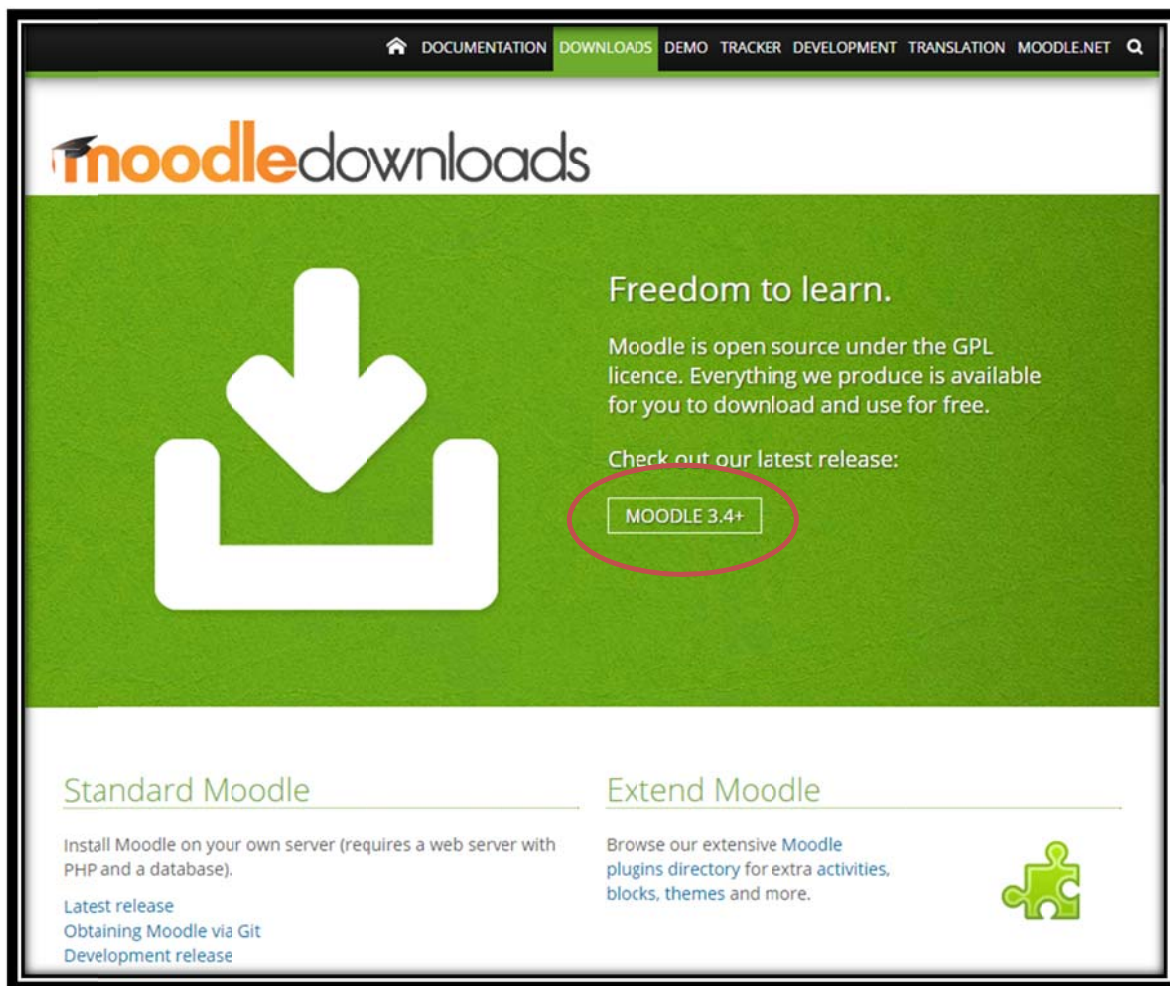
# 1. INTRODUCTION

## WHAT IS MOODLE?

Moodle is a learning management system (LMS) – a software package designed to help users / educators create quality online courses and manage learner outcomes. Moodle is Open Source software, meaning users are free to download it, use it, modify it and even distribute it.

## BEFORE WE START – FOR ADMINISTRATORS

Moodle can be downloaded from Moodle’s download page: <https://download.moodle.org/>. This user guide will not touch on the requirements to run the Moodle page on the chosen server. Please consult the IT Department in the Office on this matter.



Further guides on installation can also be found here:  
[https://docs.moodle.org/34/en/Main\\_page](https://docs.moodle.org/34/en/Main_page)

## Main page

### Get started

- Browse features
- Teacher quick guide
- Admin quick guide
- Installation quick guide

[More quick guides >>](#)

### Manage your course

- Set up your course
- Add students
- Track progress
- Upload files

[More for teachers >>](#)

### Add activities

- Use assignments to assess
- Discuss in forums
- Test students with a quiz
- Peer-assess with a workshop

[More activities >>](#)

### What's new

- For teachers
- For students
- For admins
- Mobile

[New features list >>](#)

### Manage your site

- Add users
- Add courses
- Change the look and feel
- Install plugins

[More for administrators >>](#)

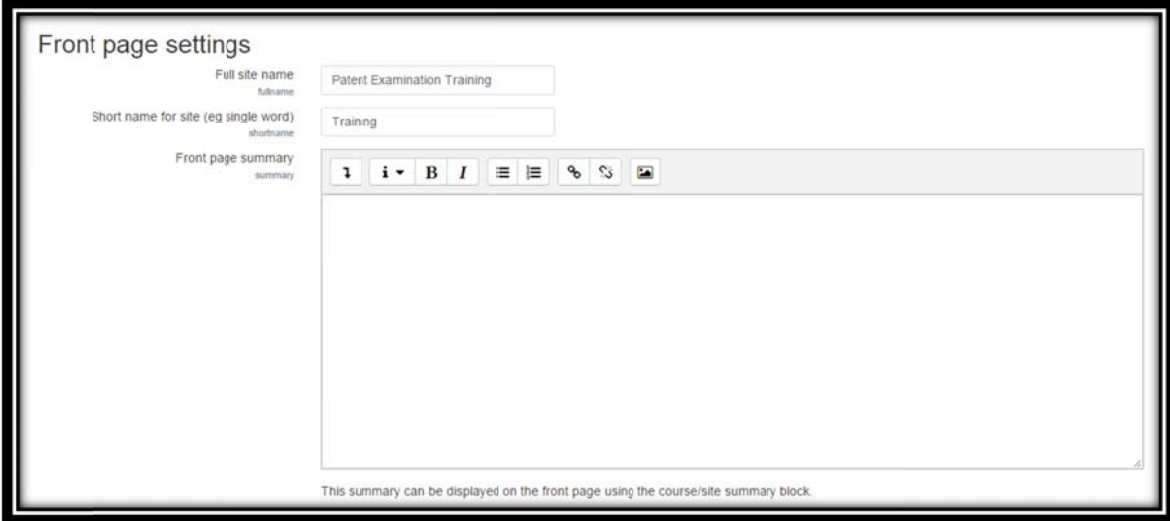
### Mobile app

- View app features
- Keep up-to-date with notifications
- Create mobile-friendly courses
- Add more app features

[More about Moodle Mobile >>](#)

## 2. SETTING UP THE FRONT / HOME PAGE

During installation, a few things will need to be set up first:

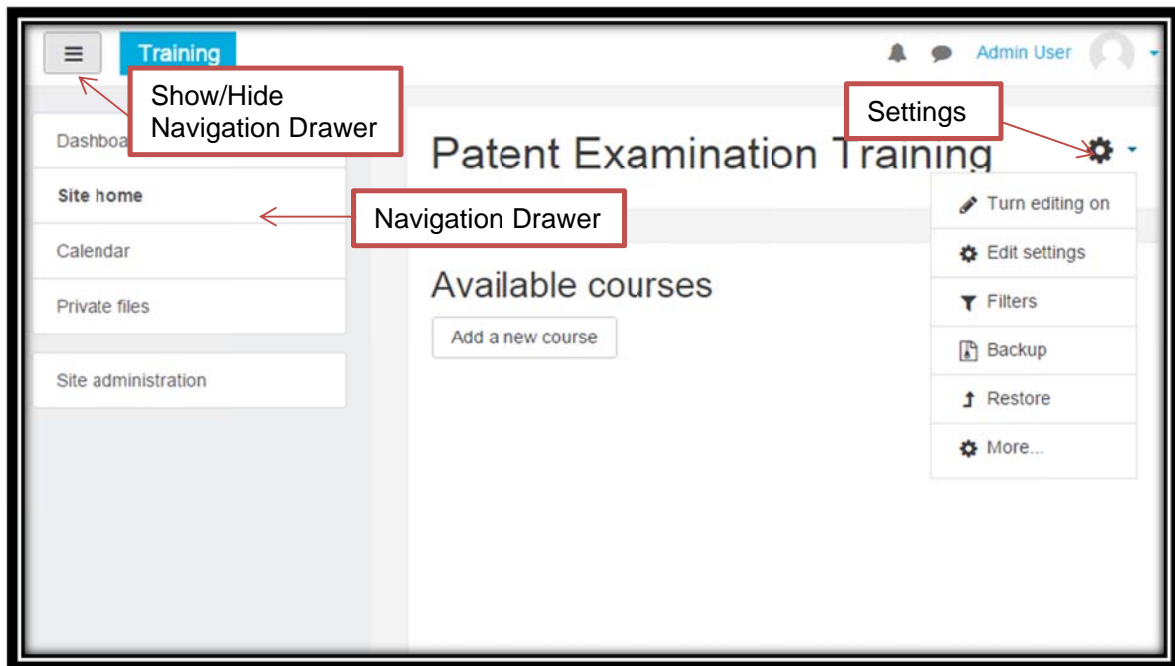


The screenshot shows the 'Front page settings' form in Moodle. It includes three input fields: 'Full site name' (with the value 'Patent Examination Training'), 'Short name for site (eg single word)' (with the value 'Training'), and 'Front page summary' (which is currently empty). Below the 'Front page summary' field is a rich text editor toolbar with icons for undo, redo, bold, italic, bulleted list, numbered list, link, unlink, and image. At the bottom of the form, there is a note: 'This summary can be displayed on the front page using the course/site summary block.'

Brief explanation of a few items shown:

- i) Full site name: the title of the site; appears at the top of every page above the navigation bar
- ii) Short name for site: appears at the beginning of the navigation bar as a link back to the front page
- iii) Front page summary: can be displayed on the front page using the course/site summary block; it is also used as the HTML metadata description in some themes

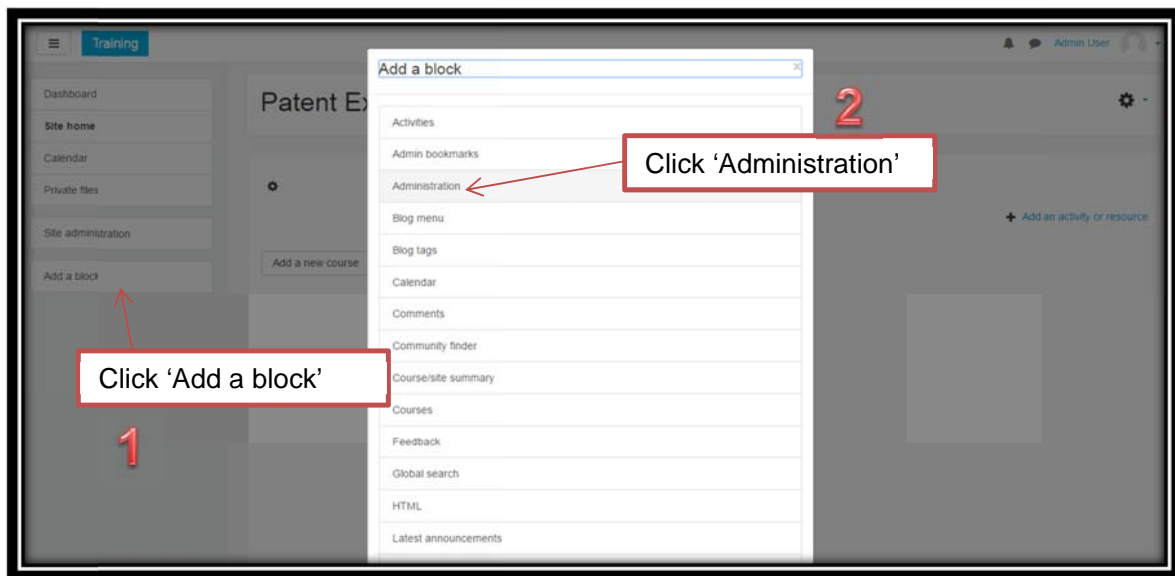
By default, a new Moodle site comes with 'Boost' theme and two other standard themes, 'Clean' and 'More'. After installation, the new site (depending on the Moodle version installed) may look like this:

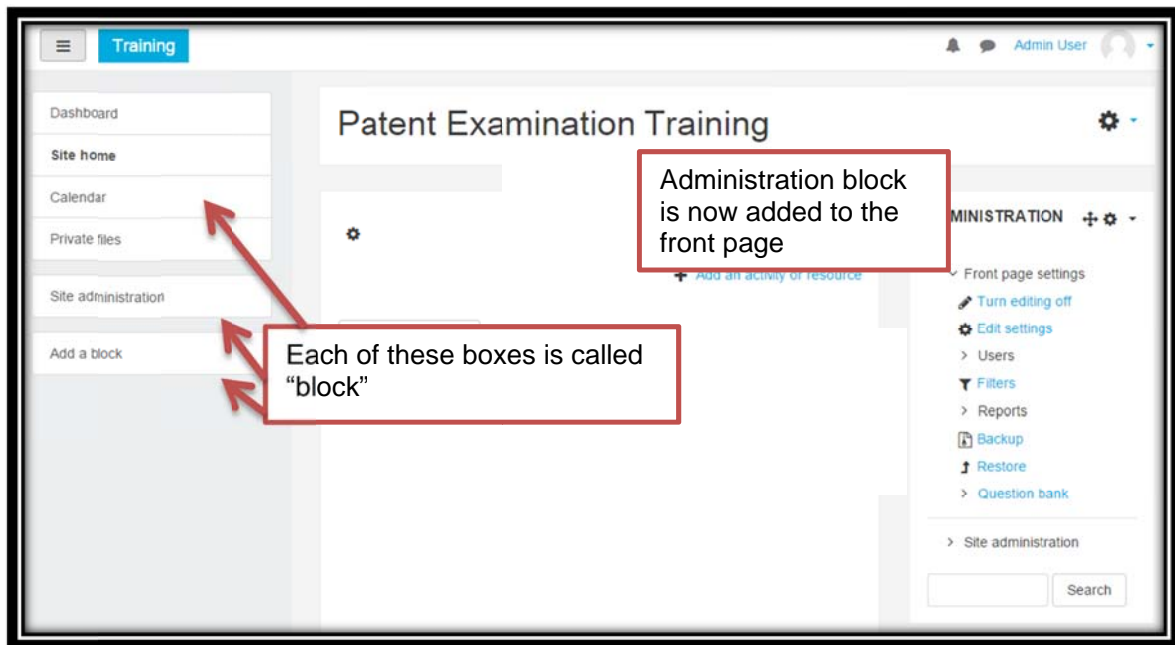


A few things for making navigation of Moodle easier:

- i) Navigation Drawer: Listed major navigation categories for ease of access. It can also be customized. The button above is used to show/hide the navigation drawer
- ii) Settings: The gear menu is used to turn editing on/off

If Boost theme is used, by default the administration block is not on the front page. To add the administration block, simply click 'Add a block' button (make sure that editing is turned on):





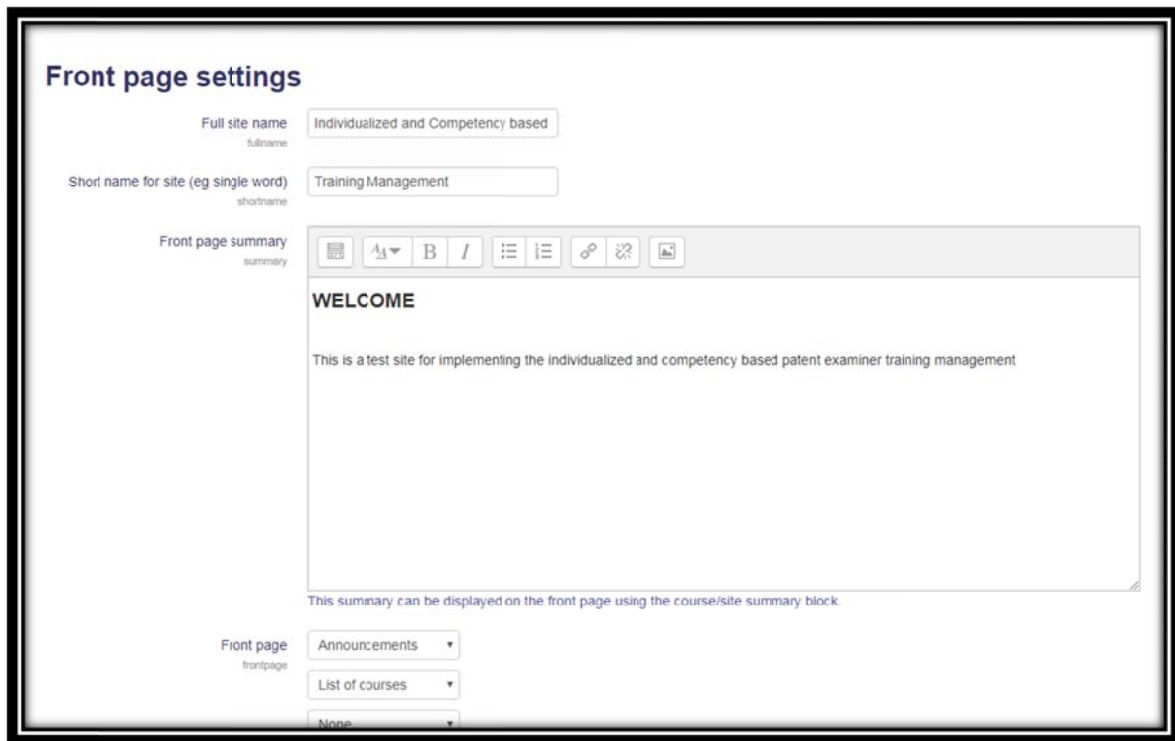
If editing is turned on, the added block(s) can be dragged and moved.

There are multiple ways for an administrator to edit the settings of the front page. One of the ways would be to click 'Edit settings' from the Administration block from the front page. Or if the 'Boost' theme is used, click the gear menu top right of the front page and then click 'Edit settings'.

## FRONT PAGE SETTINGS

This is where administrator (or other users with permission to edit these settings) can customize the site. Brief explanation on the items in this page:





- i) Full site name: the title of the site; appears at the top of every page above the navigation bar
- ii) Short name for site: appears at the beginning of the navigation bar as a link back to the front page
- iii) Front page summary: can be displayed on the front page using the course/site summary block; it is also used as the HTML metadata description in some themes
- iv) Front page: items that will be displayed on main page before logged in
- v) Front page when logged in: items that will be displayed on the main page when a user is logged in.

## APPEARANCE SETTINGS

Apart from configuring the items to be displayed, administrators (and of course, users with permitted access) can also customize the appearance of the site (for example, adding images / logos, changing color to suit corporate color of the organization, etc.). Appearance settings can be accessed from 'Appearance' tab in the 'Site administration' block.

Moodle also has hundreds of user-created themes that can be chosen from, where different themes may display blocks in different parts of the page. Even when a theme is selected, an administrator can still customize the appearance of the page. For example, the screenshot below is from a theme where all blocks are arranged on the left side of the page:

Training Management

ADMINISTRATION

- Site administration
  - Notifications
  - Registration
  - Advanced features
  - Users
  - Courses
  - Grades
  - Competencies
  - Badges
  - Location
  - Language
  - Logos
  - Security
  - Appearance**
  - Themes
- Logos
- Calendar
- Blog
- Navigation
- HTML, settings
- Module Docs
- Default Dashboard page
- Default profile page
- Courses
- AJAX and Javascript
- Manage tags
- Additional HTML
- User tours
- Front page

### Logos

Maximum size for new files: Unlimited, maximum attachments: 1

core\_admin | logo

Files

You can drag and drop files here to add them.

Default: Empty

A full logo to be used as decoration by some themes (such as core themes). This image can be quite high resolution because it will be scaled down for use (and cached for performance). Logos that are wider than they are high usually give better results. Formats accepted: PNG and JPG.

Maximum size for new files: Unlimited, maximum attachments: 1

core\_admin | logocompact

Files

You can drag and drop files here to add them.

Default: Empty

A compact version of the same logo as above, such as an emblem, shield or icon. The image should be clear even at small sizes. Formats accepted: PNG and JPG.

### **3. USER PROFILE SETTINGS**

In order to fully utilize Moodle as a tool for managing training of patent examiners, certain criteria have to be added to the existing user profile fields. For example, certain trainings require the participants to have been an examiner for a certain number of years, have technical degree in a certain field, expert in conducting examination for application in certain International Patent Classification (IPC) class, and so on. Luckily, Moodle has the option of adding or even modifying user profile field, so administrators / managers can easily browse through or filter the list of users based on these fields.

#### **HIDING UNUSED DEFAULT USER PROFILE FIELDS**

When creating a new user, the user can fill out the details in his/her profile. For example, Moodle has dedicated fields for personal Web page, ICQ number, Skype ID and other personal details to be displayed in the user profile page. Even though this details will not be shown if there is nothing inserted, it would be advantageous to hide these personal details altogether from the profile page to make room for custom user profile fields.

▶ User picture

---

▶ Additional names

---

▶ Interests

---

▼ Optional

---

**Web page**

**ICQ number**

**Skype ID**

**AIM ID**

**Yahoo ID**

These profile fields can be hidden by going to *Site administration > Appearance > Themes*, then choose the theme that is currently being used. For example, is the theme used in the 'Clean' theme, choose Clean. In the 'Custom CSS' box, type these commands:

```
fieldset#id_moodle_optional {display: none;}
fieldset#id_moodle_additional_names {display: none;}
fieldset#id_moodle_interests {display: none;}
fieldset#id_moodle_picture {display: none;}
```

Then click 'Save changes' to proceed.

Appearance

- Themes
  - Theme settings
  - Theme selector
  - Boost
  - Clean
  - More
- Logos
- Calendar
- Blog
- Navigation
- HTML settings
- Moodle Docs
- Default Dashboard page
- Default profile page
- Courses
- AJAX and Javascript

You can drag and drop files here to add them.

Default: Empty

The small logo is displayed in the navigation bar. If there is a header logo for the front page and login page, the small logo is not displayed on these pages. If a logo is not added here, the compact logo in Appearance > Logos will be used.

Display site name along with small logo  Default: Yes

theme\_clean | sitename

If there is no small logo, the site name is always displayed in the navigation bar. If a small logo is set, it may be displayed with or without the site name.

Custom CSS

theme\_clean | customcss

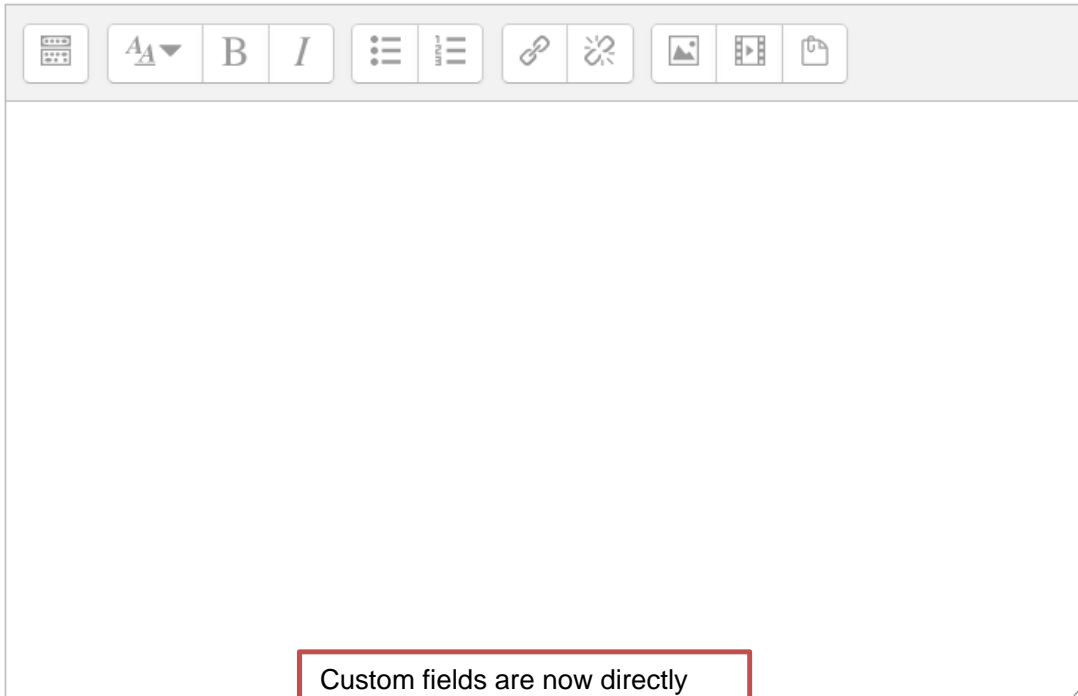
```

fieldset#id_moodle_optional {display: none;}
fieldset#id_moodle_additional_names {display: none;}
fieldset#id_moodle_interests {display: none;}
fieldset#id_moodle_picture {display: none;}

```

These profile fields now are no longer shown in the 'edit profile' section.

## Description ?



Custom fields are now directly below general fields

▶ Other details

---

▶ Institution

---

▶ Academic Education

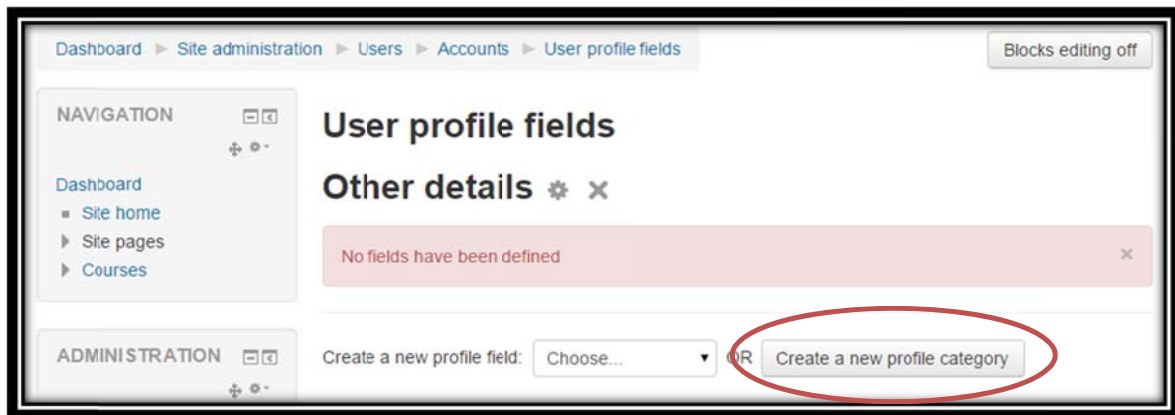
---

▶ Patent Examination details

### CREATING NEW USER PROFILE CATEGORY

Go to *Site administration > Users > Account > User profile fields*

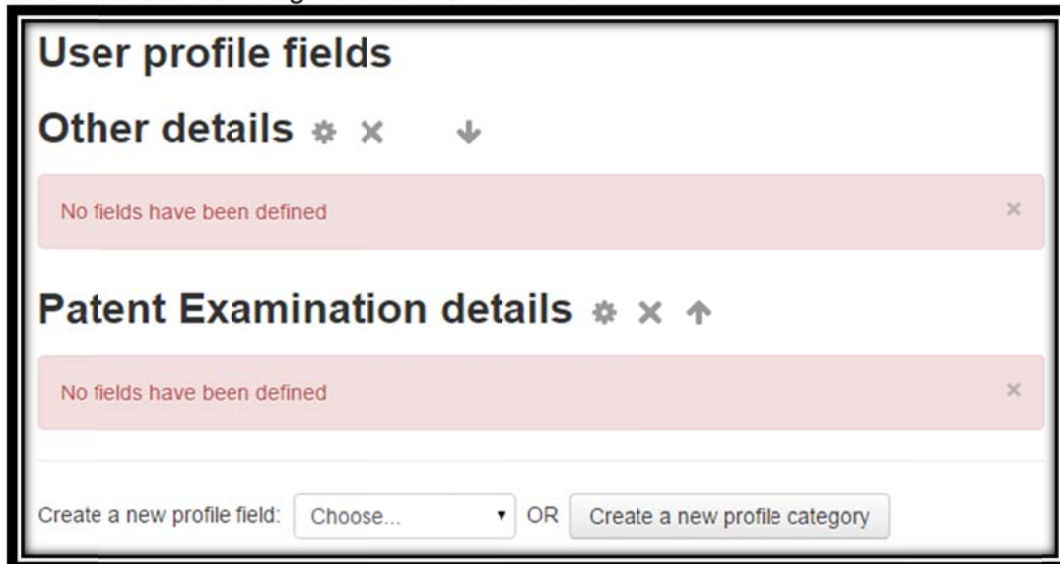
By default a category called 'Other details' are already created. New user profile fields can be created as part of the 'Other details' category. If an administrator wishes to create a new profile category, click 'Create a new profile category':



Give a new name for the category, then proceed by clicking 'Save changes':

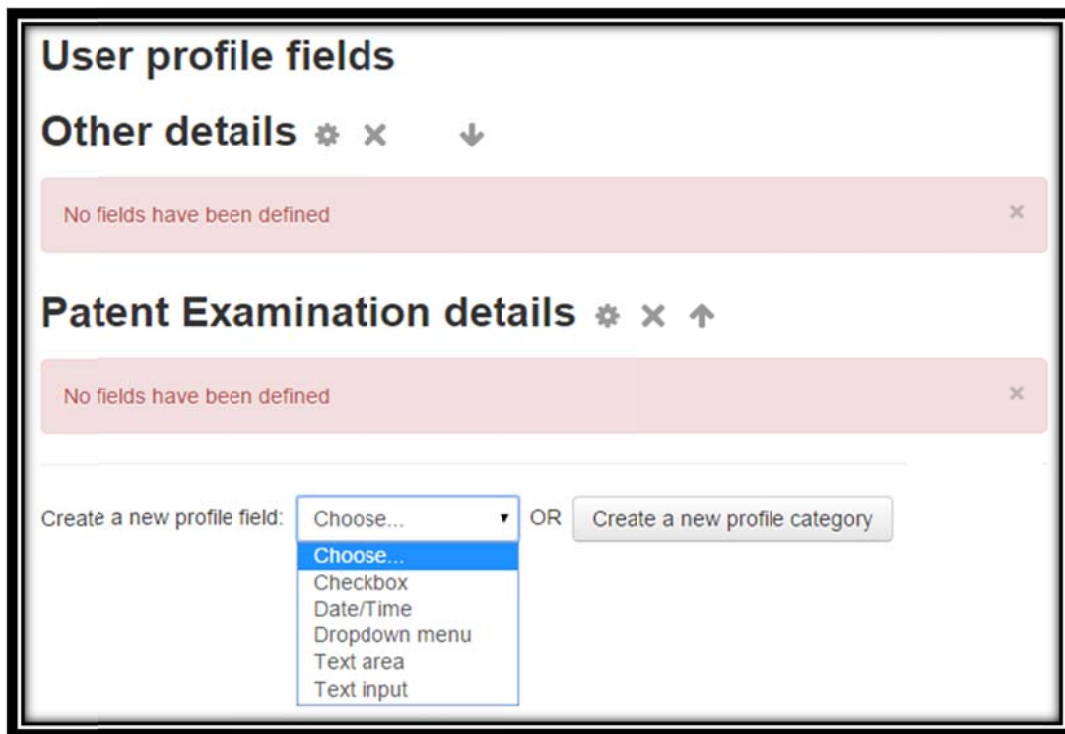


Now there are two categories that can be customized:



## CREATING NEW USER PROFILE FIELD

Now, to create a new user profile field, choose one of the available options when clicking the drop-down arrow:



For example, if there is a need to create the recruitment date of appointment of the user as a patent examiner, choose 'Date/Time' option from the menu. If the profile field only concerns month and/or year, it would be better to choose dropdown menu for each month and/or year option, as shown below:



▼ Academic Education

---

**Highest Academic Degree \***

Master ▼

**Month Attained \***

September ▼

**Year Attained \***

2010 ▼

**Technical Qualification \***

BSc. in Electrical Engineering (majoring)

Different dropdown option for month and year

In the next page, fill you the required columns for the new profile field. It is recommended to put only one word in the 'Short name' column for easy reference.

## Creating a new 'Date/Time' profile field

[▼ Collapse all](#)

▼ Common settings

---

**Short name (must be unique) \***

**Name \***

**Description of the field**

Appointment date as a patent examiner in the Patent Office

Specify other settings for this field. A short explanation on these items:

- i. Is this field required? : a user must fill this field
- ii. Is this field locked? : If this field is locked, once inputted, only users with authorization are allowed to change it
- iii. Should the date be unique? : Unique means only one user can key in the same input. For example, recruitment date may not be unique, but staff ID number may be unique
- iv. Display on signup page? : The custom field is displayed during signup. Choose no if the user field can only be inputted by authorized users, not users themselves
- v. Who is this field visible to? : Choose visibility settings
- vi. Category: If there is new category created, choose between the default category ('Other details') and the new category. If there is no new category created, the custom field will be put under the default category.
- vii. Other specific settings depending on the type of user field created

After completing the suitable preferences, click 'Save changes' to proceed.

**Is this field required?**  
Yes ▾

**Is this field locked?**  
Yes ▾

**Should the data be unique?**  
No ▾

**Display on signup page?**  
Yes ▾

**Who is this field visible to?** ⓘ  
Visible to everyone ▾

**Category**  
Patent Examination details ▾

**Specific settings**

---

**Start year**  
1900 ▾

**End year**  
2018 ▾

**Include time?**

**Save changes** **Cancel**

For a user profile field in which a user has to choose on of possible options, choose the 'dropdown menu' option, and under the specific settings, every option is in one line, as shown here:

▼ Specific settings

---

**Menu options (one per line)**

A01B  
A01C  
A01D  
A01F  
A01G  
A01H

**Default value**

However, this type of option only allows one item to be chosen. It may be a good idea to use Text Input for multiple inputs.

When a user first signs up, these customized fields will be displayed:

**Month Attained \***

September ▾

**Year Attained \***

2010 ▾

**Technical Qualification \***

BSc. in Electrical Engineering (majoring


**Institute / University \***

Universiti Kebangsaan Malaysia

▼ Patent Examination details

---

**Recruitment as a Patent Examiner \***

16 ▾ January ▾ 2006 ▾ 

**Technical Fields \***

H02J ▾

[Update profile](#)

After that, depending on the preference settings, all the customized fields will be shown in the user's profile page:

**User details** [Edit profile](#)

**Email address**  
Sofiarehan.Ramli@wipo.int

**Year of Birth**  
1982

**Intellectual Property Office of**  
Malaysia

**Highest Academic Degree**  
Master

**Month Attained**  
September

**Year Attained**  
2010

**Technical Qualification**  
BSc. in Electrical Engineering  
(majoring in Power)

**Institute / University**  
Universiti Kebangsaan Malaysia

**Recruitment as a Patent Examiner**  
16 January 2006

**Technical Fields**  
H02J

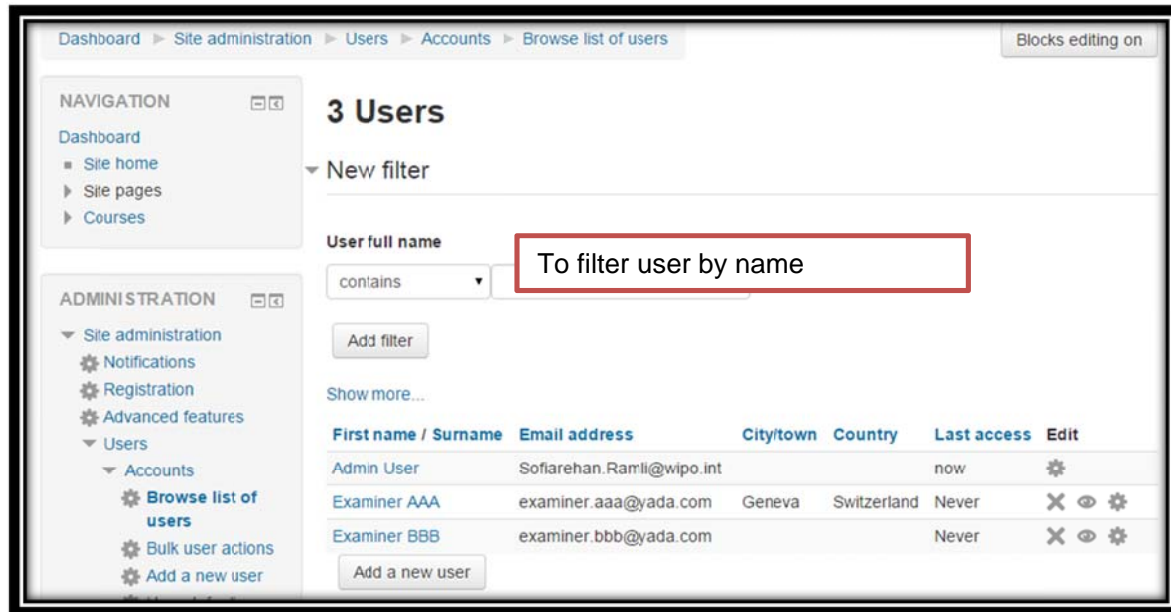
These are all customized user profile fields

## ADDING USERS

[https://docs.moodle.org/33/en/Add\\_users](https://docs.moodle.org/33/en/Add_users)

## EXTRACTING DATA OF USERS

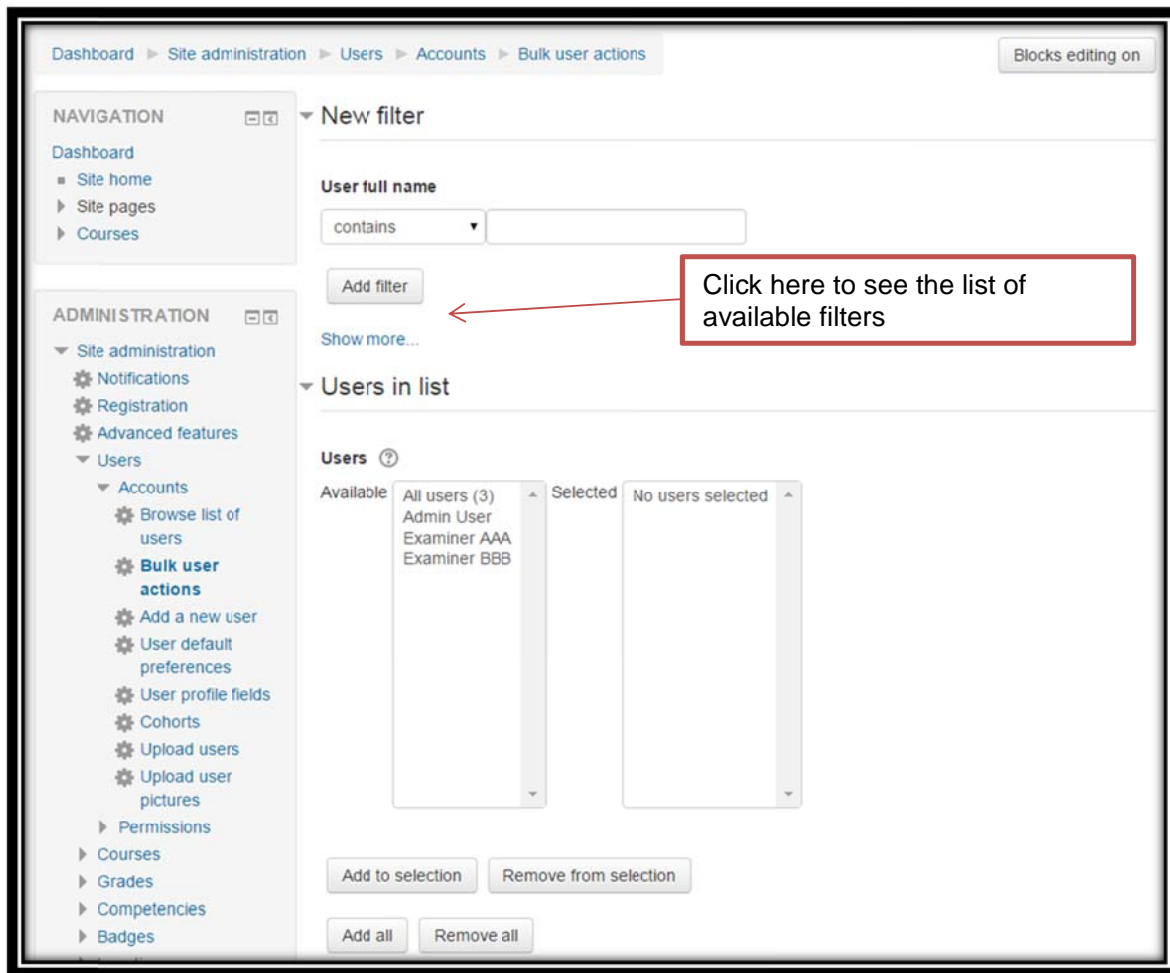
Administrators (and users with permissions) have the ability to view and download user data. To view the list of registered users in the Moodle site, go to *Site administration > Users > Accounts > Browse list of users*:



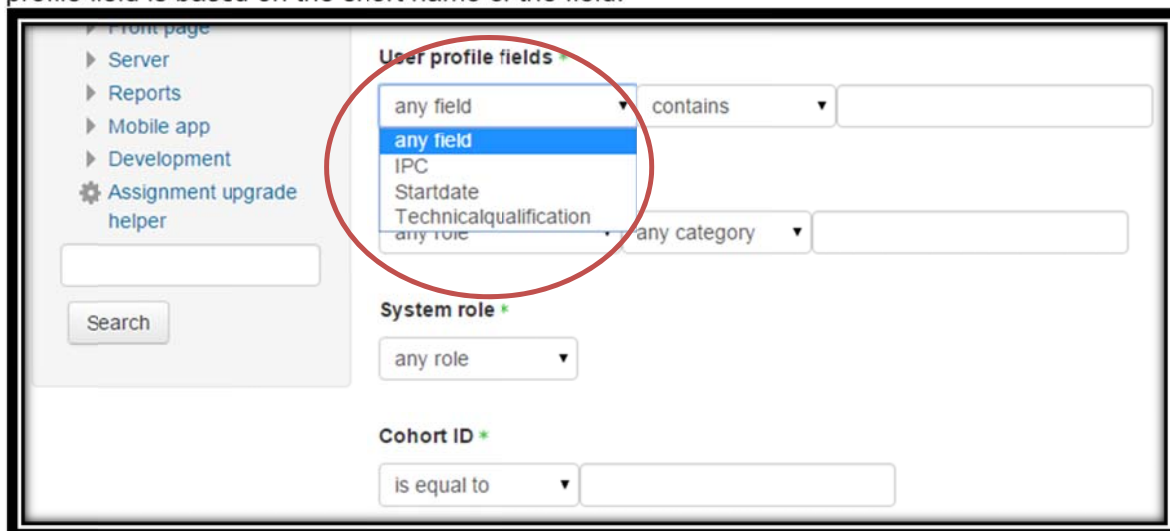
However, as the name suggests, this only allows the administrator to view the list of users. It also only allows the results to be filtered by user full name.

In order to extract full data of all users, or a group of users with certain criteria, go to *Site administration > Users > Accounts > Bulk user actions*.

This **page** also has the header 'New filter', similar to *Browse list of option page*. However, instead of having only one filter, clicking 'Show more...' will reveal that the list of users can be filtered using any field found in the user profile:



Filters according to the custom user profile fields are also possible. Notice that the user profile field is based on the short name of the field:



For example, if the administrator wants a list of users that examine applications relating to human necessities (A section), then click 'Add filter':



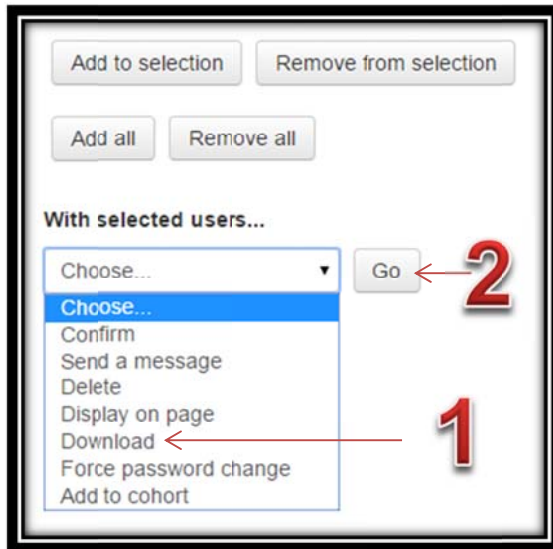
The image shows a user profile search interface. On the left is a sidebar with navigation links: Security, Appearance, Front page, Server, Reports, Mobile app, Development, and Assignment upgrade helper. The main area contains search filters for 'User profile fields', 'Course role', 'System role', and 'Cohort ID'. A red circle highlights the 'User profile fields' section, which includes a dropdown menu set to 'IPC', a comparison operator dropdown set to 'starts with', and a text input field containing the letter 'a'.

Now the 'users in list' will only show users in which his/her IPC starts with A:

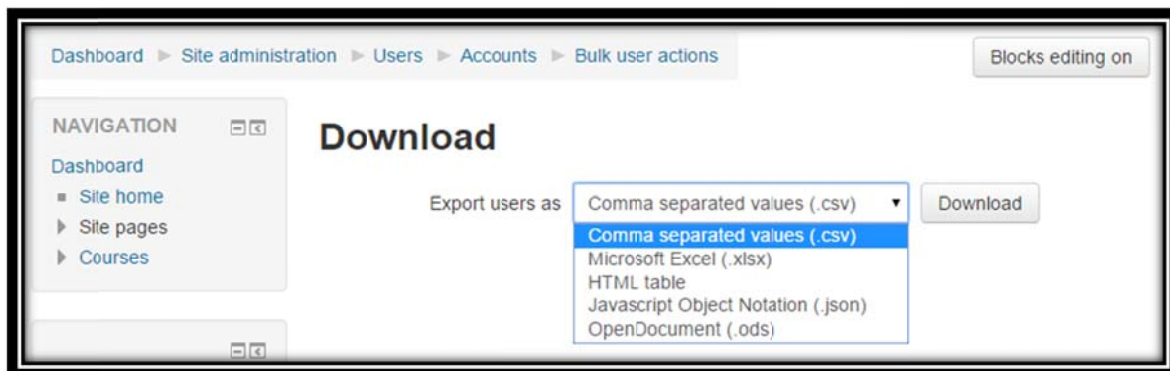
The screenshot shows a user management interface with the following elements:

- Active filters:** A section with a dropdown arrow and the text "Active filters". Below it is a filter condition: "User profile fields: IPC starts with a". There are two buttons: "Remove selected" and "Remove all filters". A red box highlights this section with the text "This section will display all active filters".
- Users in list:** A section with a dropdown arrow and the text "Users in list". Below it is a "Users" section with a help icon. It shows "Available" users and "All filtered (1)" users. The filtered user is "Examiner AAA". A red box highlights this section with the text "List of users that fulfill the conditions of the filter".
- Buttons:** "Add to selection", "Remove from selection", "Add all", and "Remove all".
- With selected users...:** A dropdown menu with "Choose..." and a "Go" button.

To download the list of users, choose 'Download', then click 'Go':



Choose the format of the file containing the list of users, then click 'download':



Once the file has been downloaded, click the file to open it. This is how the document looks like if it is in Microsoft Excel (.xlsx) format:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
ID	username	email	firstname	lastname	idnumber	institution	department	phone1	phone2	city	url	icq	skype	aim	yahoo	msn	country	profile_field_Startdate	profile_field_IPC	profile_field_Technicalqualification
1	examiner.aaa	examiner.aaa@yada.com	examiner	AAA						Geneva							CH	1483311600	A01L	PhD. in Analytical Chemistry
2	admin	Sofarehan.Ramli@nipoi.int	admin	User														117366000	H02J	BSc. in Electrical Engineering (majoring in Power)
3	examiner.bbb	examiner.bbb@yada.com	examiner	BBB														1415039600	801D57	M.S in Biotechnology

The custom user profile fields are usually to the right of the default fields, as shown above.

Regarding dates, in the spreadsheet, the dates are using a Unix timestamp format, wherein the system describes the point as the number of seconds that have elapsed since Coordinated Universal time (UTC), 1 January 1970. To convert the format back to date, in a new column, use this formula:

$$=(A1/86400)+25569+(-5/24)+1$$

Where A1 is the cell containing the Unix timestamp. Then, right click on the cell to change its format to Date. The additional column now displays the recruitment date in date format, as shown below:

E	S	T	U	V
lastname	profile_field_Startdate	Startdate	profile_field_IPC	profile_field_Technicalqualification
AAA	1483311600	02.01.2017	A01L	PhD. in Analytical Chemistry
User	1137366000	16.01.2006	H02J	BSc. in Electrical Engineering (majoring in Power)
BBB	1485039600	22.01.2017	B01D57	M.S in Biotechnology

## 4. ROLES IN MOODLE

Normally in a classroom training program, a hierarchy of examiners with differing capability is needed to maintain the flow of the training. Not all examiners who are involved in a training program have the same roles. For example, when there are trainees, there must be trainers, coordinators, and so on. Similar approach is also applicable in Moodle. Moodle has several default roles that can be customized according to the needs of a patent office.

For example, the usual roles found in training are as follows:

ROLE	DESCRIPTION
Coordinator	the person in charge of the training, usually does not involve in the training, but rather managing the training
Supervising Examiner / Mentor	may or may not directly involved in the training, mainly for assisting trainees
Trainer	examiners who are responsible for training the trainees, also the grader
Examiner	examiners who are not involved in the training
Trainee	examiners who are involved in the training

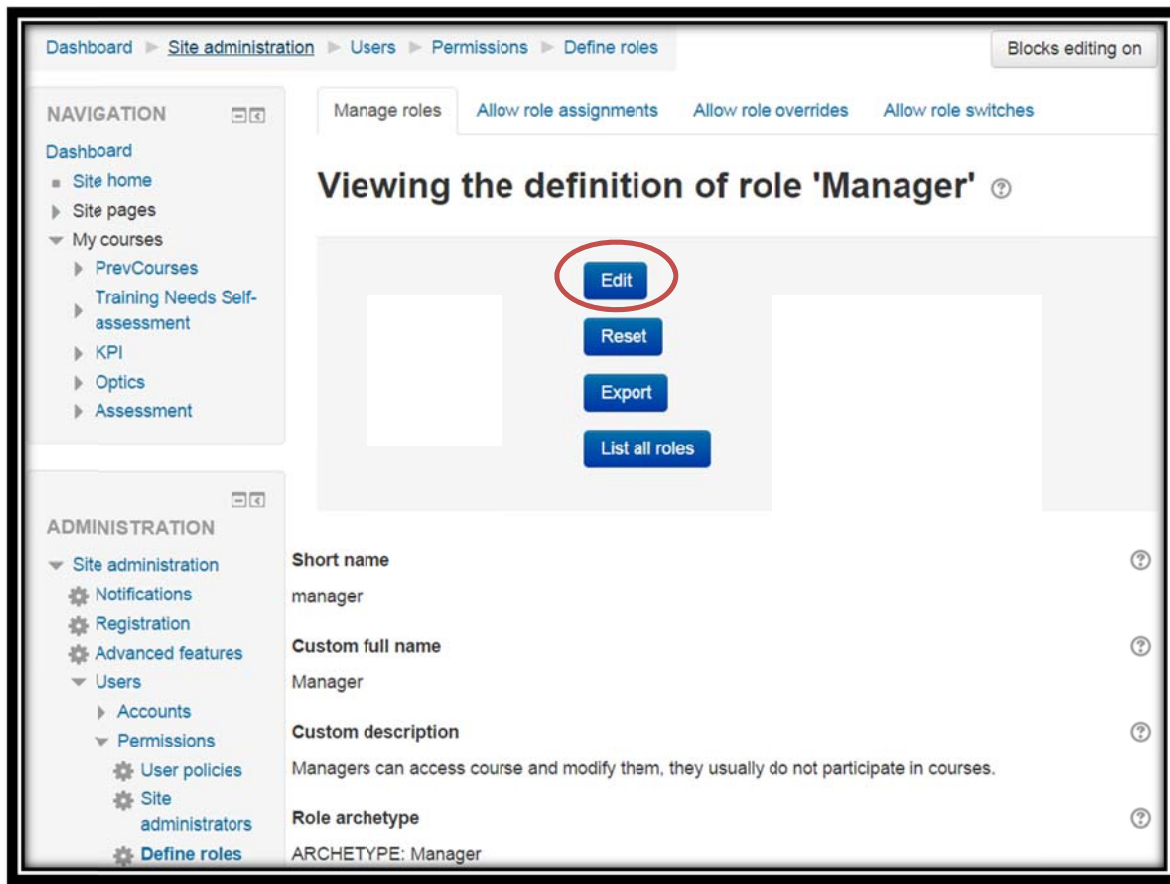
In Moodle, the standard roles and their description are:

ROLE	DESCRIPTION
Manager	Can access and modify course, usually do not participate in courses
Course creator	Can create new courses
Teacher	Can do anything within a course, including changing the activities and grading students
Non-editing teacher	Can teach in courses and grade students, but may not alter activities
Student	Generally have fewer privileges within a course
Guest	Have minimal privileges and usually cannot enter text anywhere
Authenticated user	All logged in users
Authenticated user on frontpage	All logged in users in the frontpage course

As can be seen, some of the roles in training have the same function as the role created in Moodle. Moodle also allows changing the role name, therefore it would be advisable to follow the role in training.

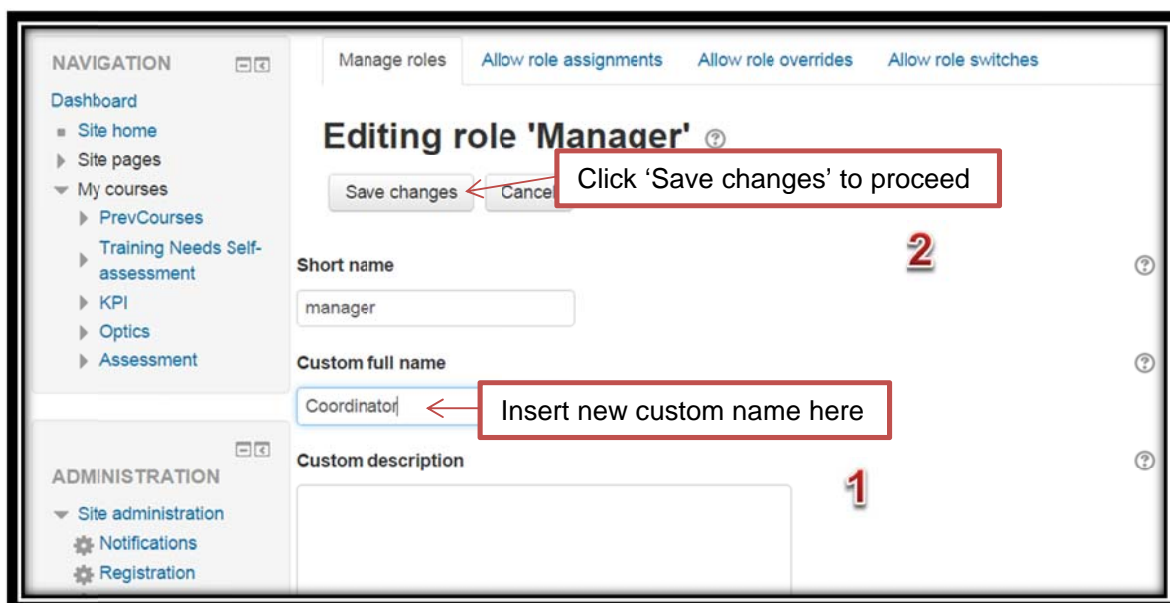
To change name of standard roles in Moodle, go to *Site administration > Users > Permission > Define roles*. Click the name of the role that is to be changed. In this example, 'Manager' will be changed to 'Coordinator'.

In the next page, click 'Edit' to edit the name.











The 'Custom full name' box is left empty. By default, the 'Custom full name' box of all roles is empty, so the role will follow the name written in the 'Short name' box. So, in order to change the name of the role, key in the desired name in the 'Custom full name' box. Then click 'Save changes' to proceed.

Please do not change the short name of any of the standard roles.



The role now has been changed to 'Coordinator'.

Role 	Description	Short name	Edit
<a href="#">Coordinator</a>	Managers can access course and modify them, they usually do not participate in courses.	manager	  
<a href="#">Course creator</a>	Course creators can create new courses.	coursecreator	   

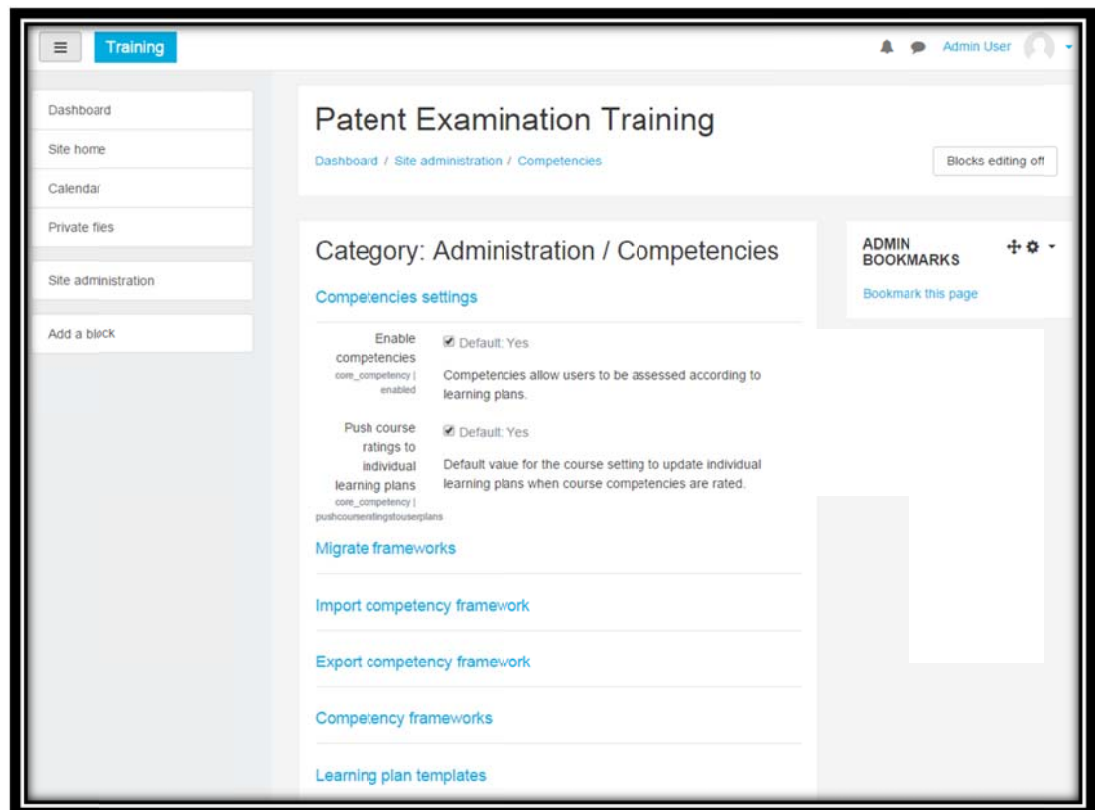
## 5. COMPETENCY FRAMEWORKS

Competencies describe the level of understanding of proficiency of a learner in certain subject-related skills. In Moodle, it is possible for an administrator / manager to create and apply competency frameworks for evaluating patent examiners against competencies. The competency framework for patent examiners can be downloaded here: <URL>

### FOR ADMINISTRATORS: SETTING UP COMPETENCY FRAMEWORK

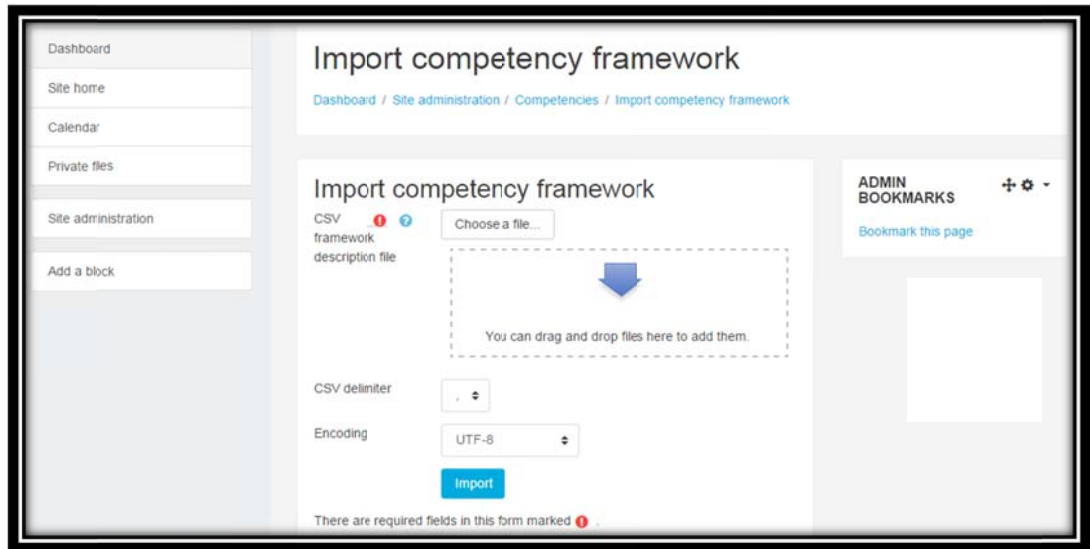
Site Administrators can create a competency framework and define associated competencies. Below are the steps in setting up competency framework:

- i) **Enable Competencies**  
Administrators can double check that competencies are enabled on the Moodle instance. To enable competencies:  
*Site administration > Competencies > Competency settings*

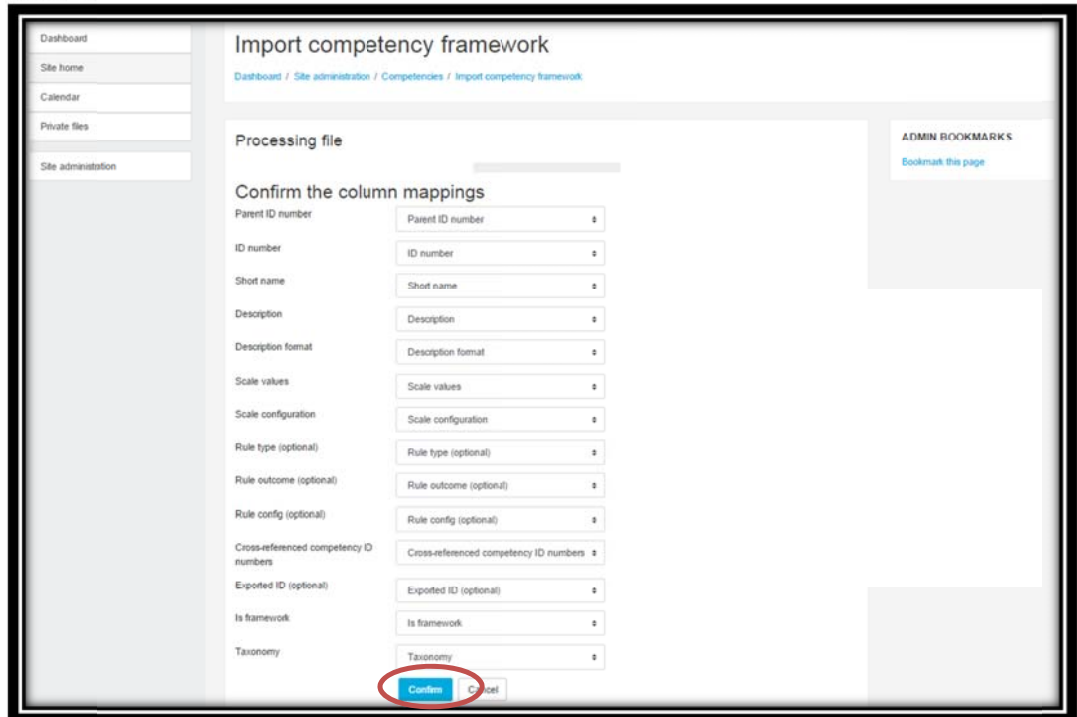


- ii) **Import Competency Framework**  
To import competency framework, go to: *Site administration > Competencies > Import competency framework*  
Click 'Choose a file', and choose the competency framework for patent examiners downloaded earlier. Alternatively the file can be dragged and dropped to the box with big blue arrow to be added (however this option is currently not available if Internet Explorer browser is used).  
Click 'Import'.

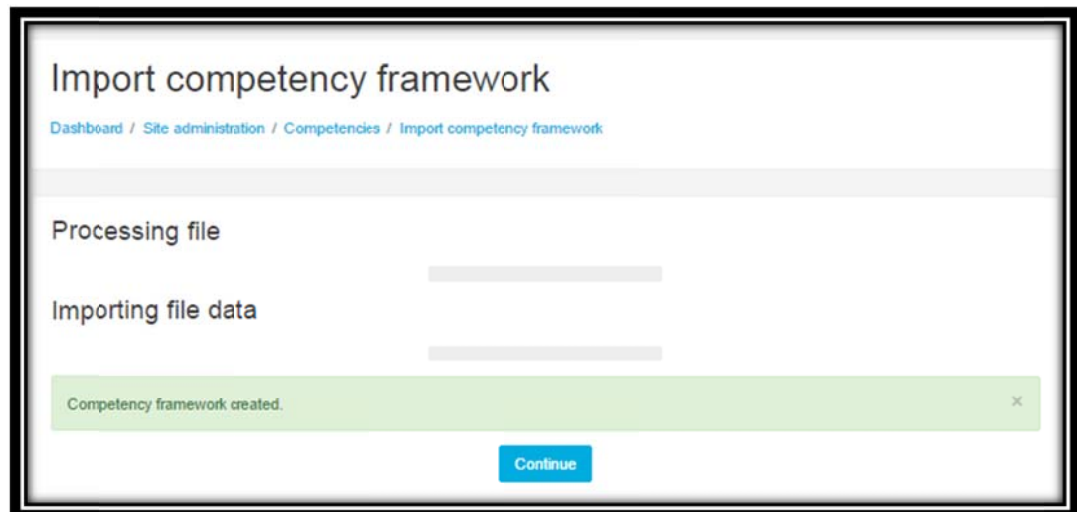




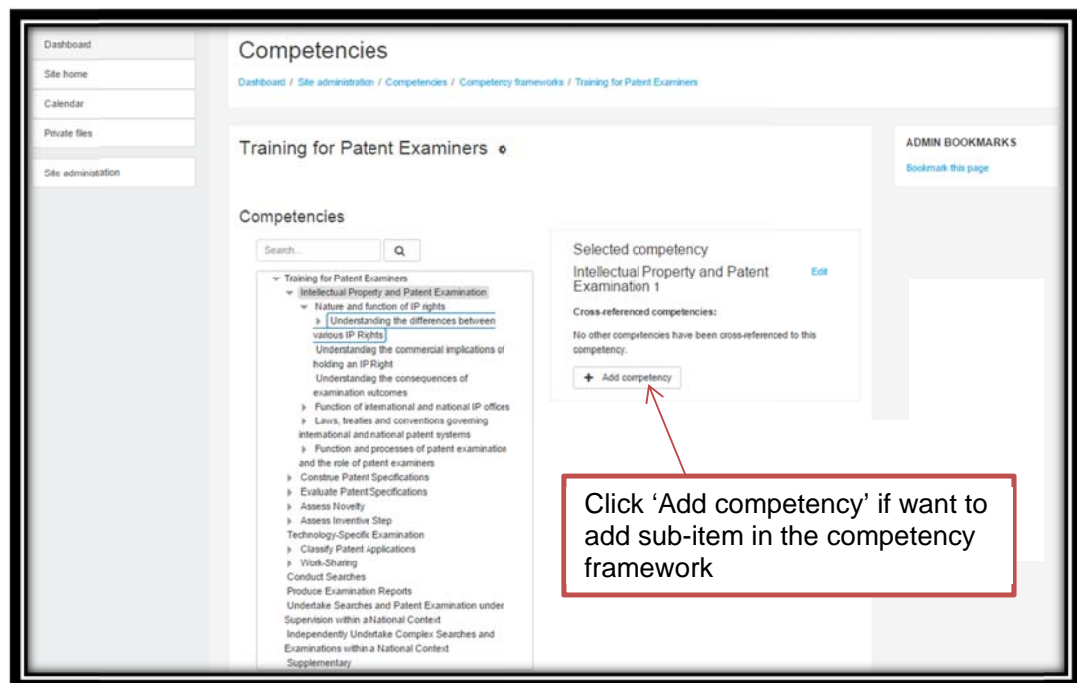
Click 'Confirm'.



Click 'Continue' to proceed.



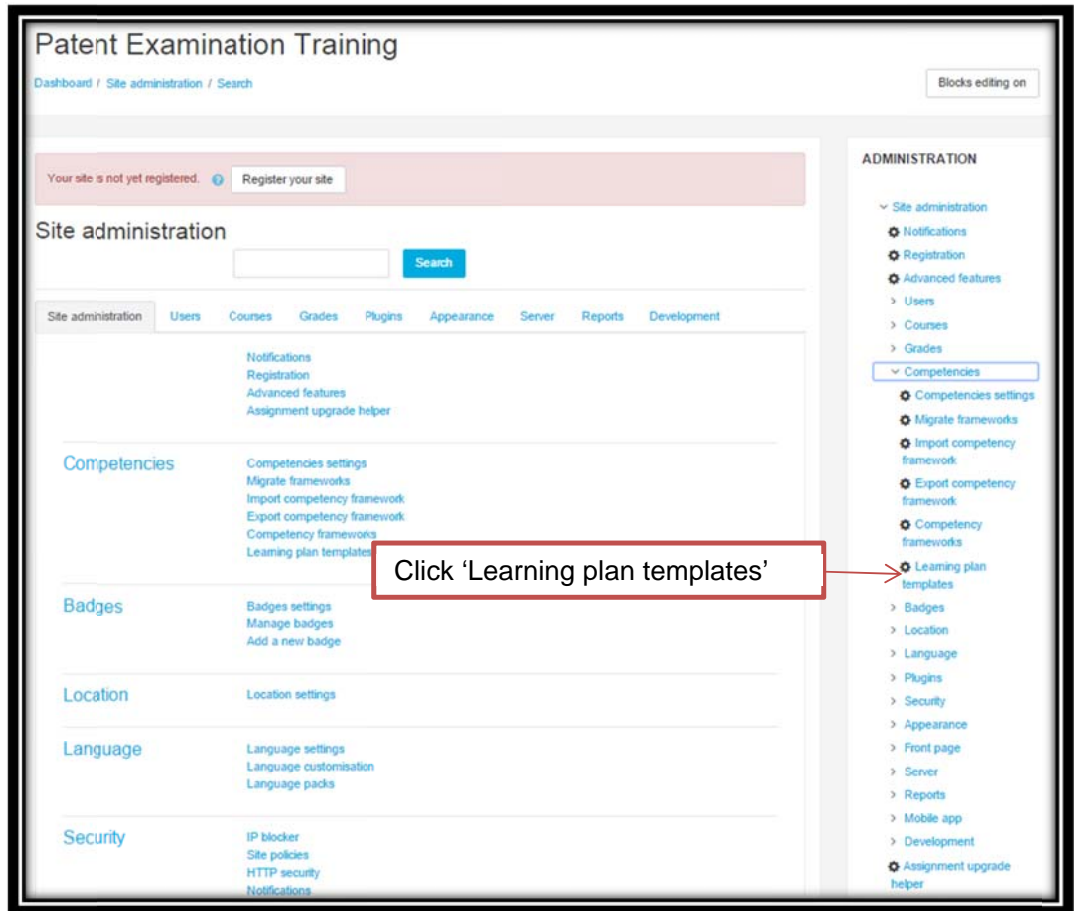
Once competency framework has been added, administrators can use the competency to create learning plans. The template competency framework can also be modified.



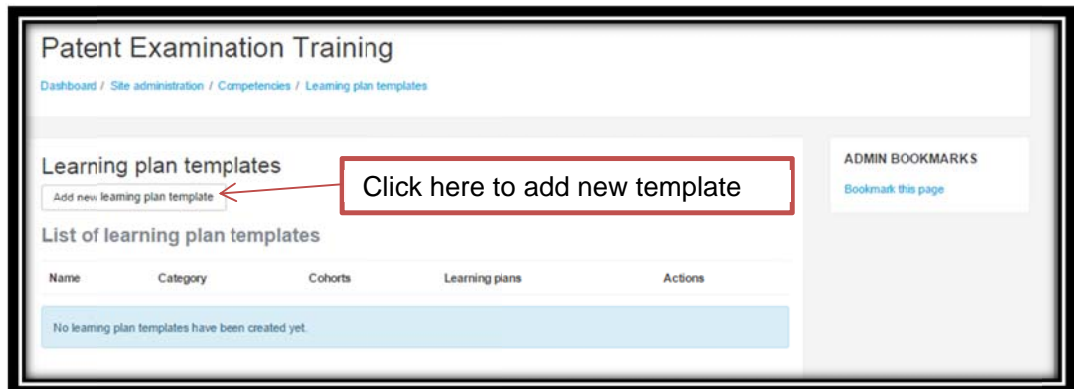
#### FOR MANAGERS / TEACHERS: CREATE LEARNING PLAN TEMPLATES

Once competency framework has been set up, the next step is creating a learning plan template. A learning plan template is handy when there are many patent examiners in one Office and each examiner's progress in terms of competencies needs to be monitored and tracked. A template also means that it is easy to implement changes to the learning plan, as a change in the template will change the individual learning plan of the examiners.

- i) Create learning plan templates  
Go to *Site administration > Competencies > Learning plan templates*



All learning plan templates that have been created will be displayed here. To add a new learning plan template, click 'Add new learning plan template':



Create a new learning template by giving it a name, and optionally a short description of the template:

Patent Examination Training

Dashboard / Site administration / Competencies / Learning plan templates / Add new learning plan template

### Learning plan templates

#### Add new learning plan template

General

Name  !

Description

Visible

Due date       Enable

Category

There are required fields in this form marked !.

ADMIN BOOKMARKS  
[Bookmark this page](#)

Click here to save the new template

ii) Adding competencies to a learning plan template

Once a learning plan template has been created, managers/teachers can add competencies that must be achieved for all patent examiners under the learning plan template:

Patent Examination Training

Dashboard / Site administration / Competencies / Learning plan templates / Training for Patent Examiners Level 1

Learning plan template created

### Training for Patent Examiners Level 1

For newly-recruited patent examiners

#### Learning plan template competencies

No competencies have been linked to this learning plan template.

[Manage competencies and frameworks](#)

ADMIN BOOKMARKS  
[Bookmark this page](#)

Click here to add competencies

Patent Examination Training

Dashboard / Site administration / Competencies / Learning plan templates / Training for Patent Examiners Level 1

Learning plan template created

ADMIN BOOKMARKS  
[Bookmark this page](#)

Training for Patent Examiners  
For newly-recruited patent examiners

Add competencies to learning plan

Learning plan template  
No competencies have been linked

Manage competencies and frameworks

Competency picker

Competency frameworks  
Training for Patent Examiners T1.0

Locate competency

Search...

- Training for Patent Examiners
  - Intellectual Property and Patent Examination
  - Construct Patent Specifications
  - Evaluate Patent Specifications
  - Assess Novelty
  - Assess Inventive Step
  - Technology-Specific Examination
  - Classify Patent Applications
  - Work-Sharing
  - Conduct Searches
  - Produce Examination Reports
  - Undertake Searches and Patent Examination under Supervision within a National Context
  - Independently Undertake Complex Searches and Examinations within a National Context
  - Supplementary

Choose the relevant competencies to add to the learning plan template

After selecting all competencies, click 'Add'

Add Cancel

Learning plan template created

## Training for Patent Examiners Level 1

For newly-recruited patent examiners

Add competencies to learning plan template

### Learning plan template competencies

0 out of 4 competencies linked to courses

- + Nature and function of IP rights 1.1**  
Training for Patent Examiners - Competency  
Path: [Training for Patent Examiners / 1](#)  
Linked courses: [No courses are linked to this competency](#)
- + Function of international and national IP offices 1.2**  
Training for Patent Examiners - Competency  
Path: [Training for Patent Examiners / 1](#)  
Linked courses: [No courses are linked to this competency](#)
- + Laws, treaties and conventions governing international and national patent systems 1.3**  
Training for Patent Examiners - Competency  
Path: [Training for Patent Examiners / 1](#)  
Linked courses: [No courses are linked to this competency](#)
- + Function and processes of patent examination and the role of patent examiners 1.4**  
Training for Patent Examiners - Competency  
Path: [Training for Patent Examiners / 1](#)  
Linked courses: [No courses are linked to this competency](#)

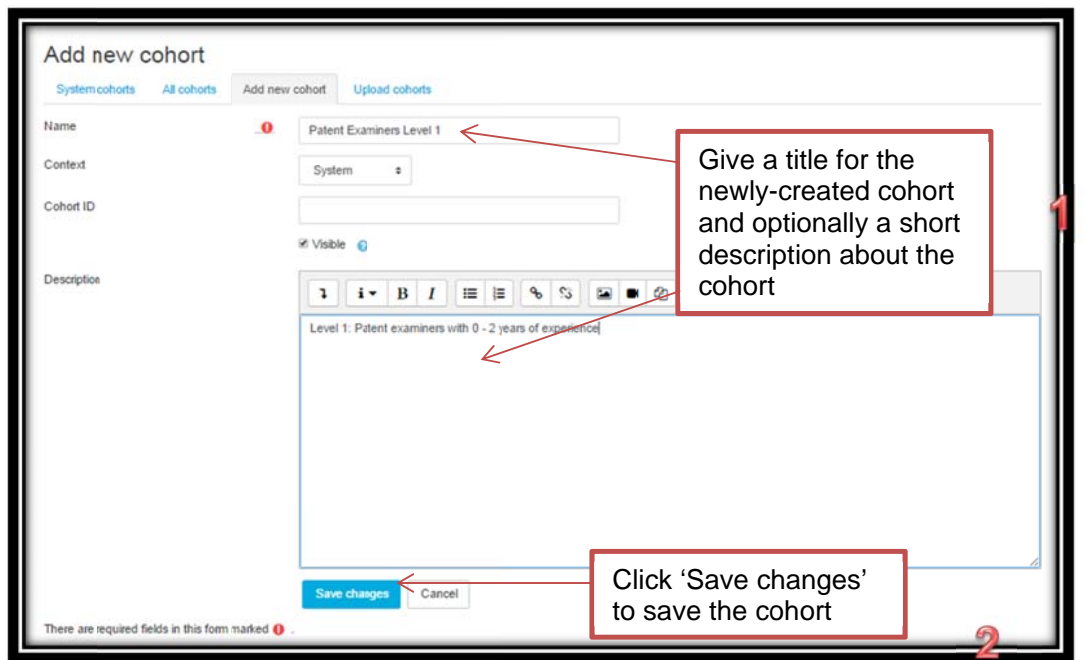
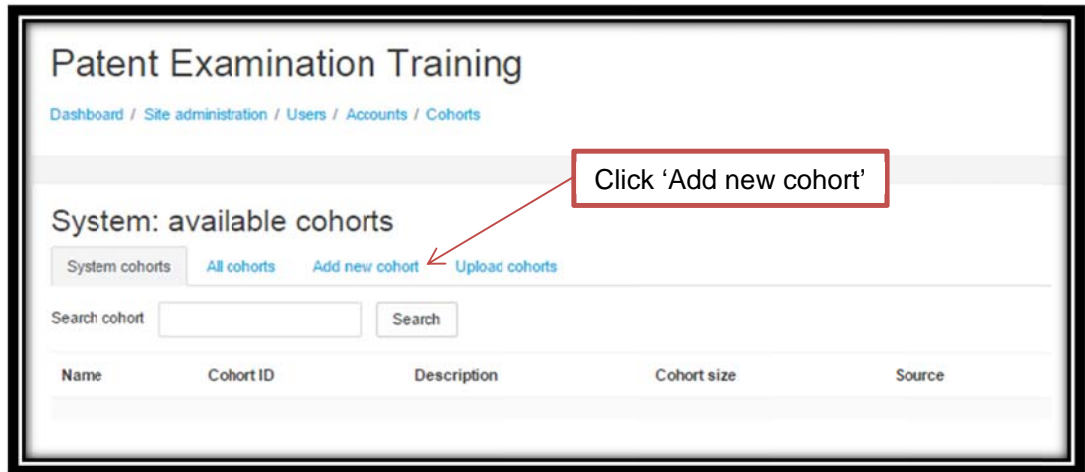
[Manage competencies and frameworks](#)

All competencies related to the learning plan template will be listed here

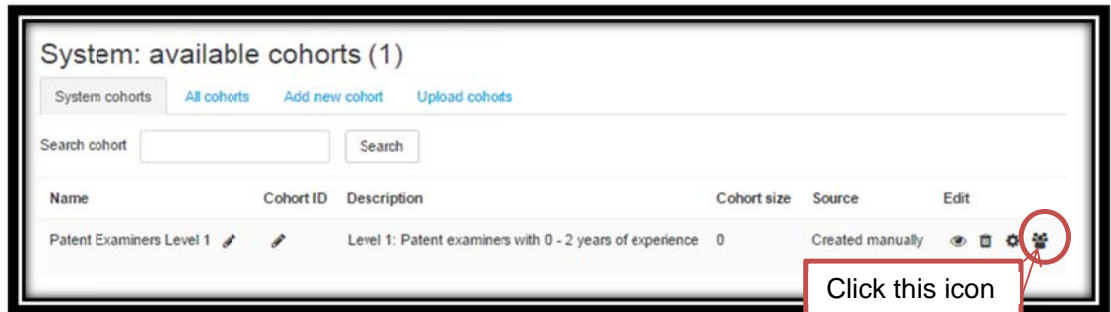
- iii) **Creating cohorts**  
Cohorts are site-wide groups. The purpose of cohorts is to enable all members of the cohort to be easily enrolled in a course, or assigned with a learning plan with only a few clicks.

To create a cohort, go to *Site administration > Users > Account > Cohorts*

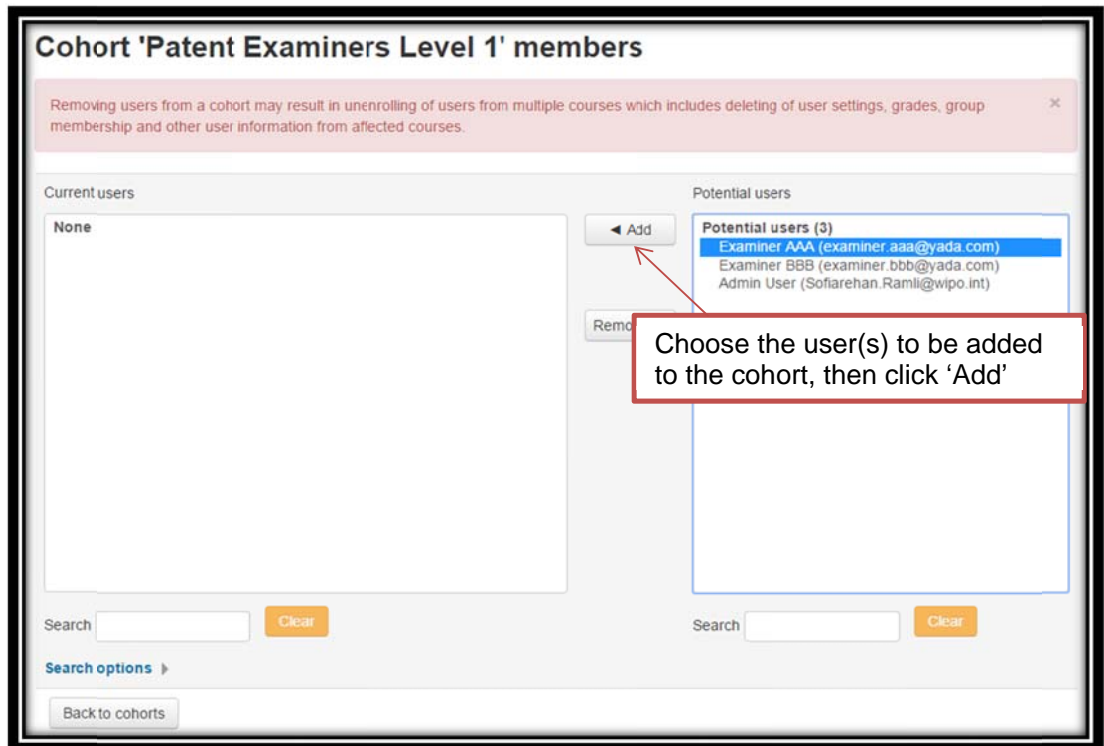
The page will show all available cohorts. Click 'Add new cohort' to create one:



- iv) Assigning users to a cohort  
To assign a user to a cohort, click the rightmost icon under the 'Edit' column:

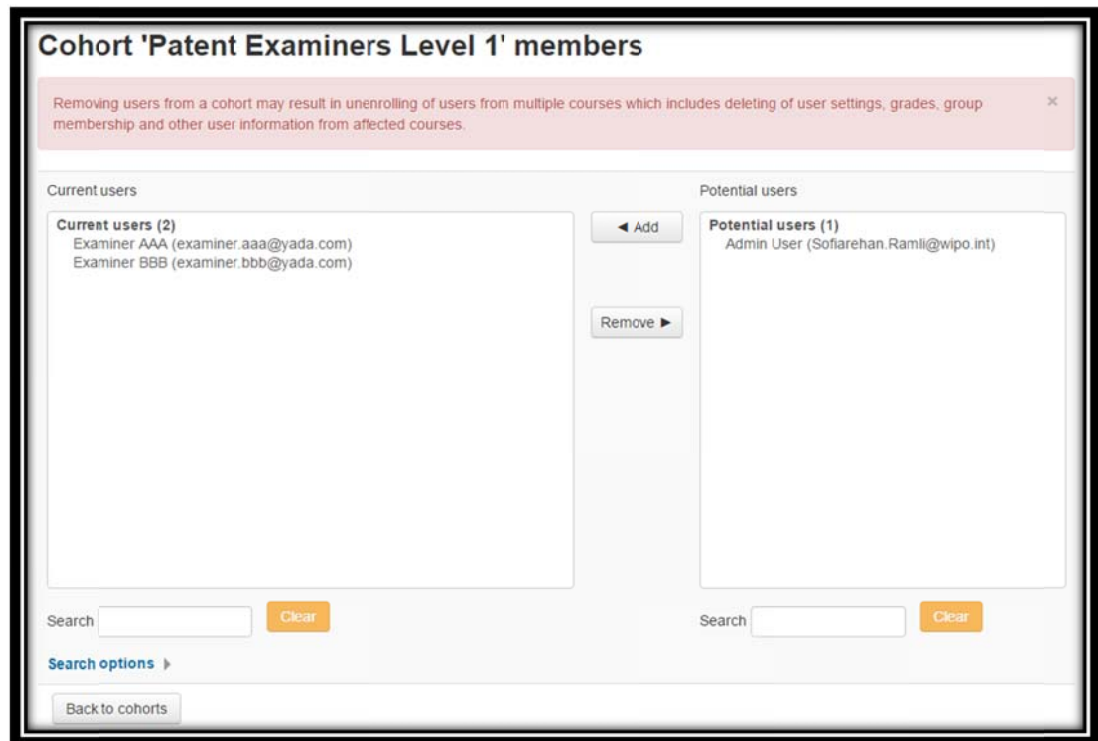


Click the users to be added to the cohort. Hold 'Ctrl' to choose more than one user. Then click 'Add'.



The users are now added to the cohort.

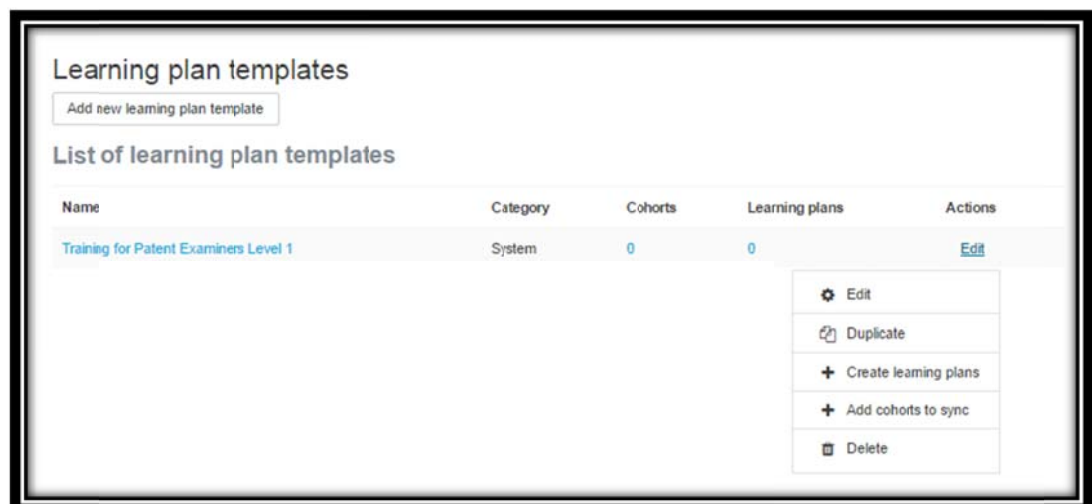




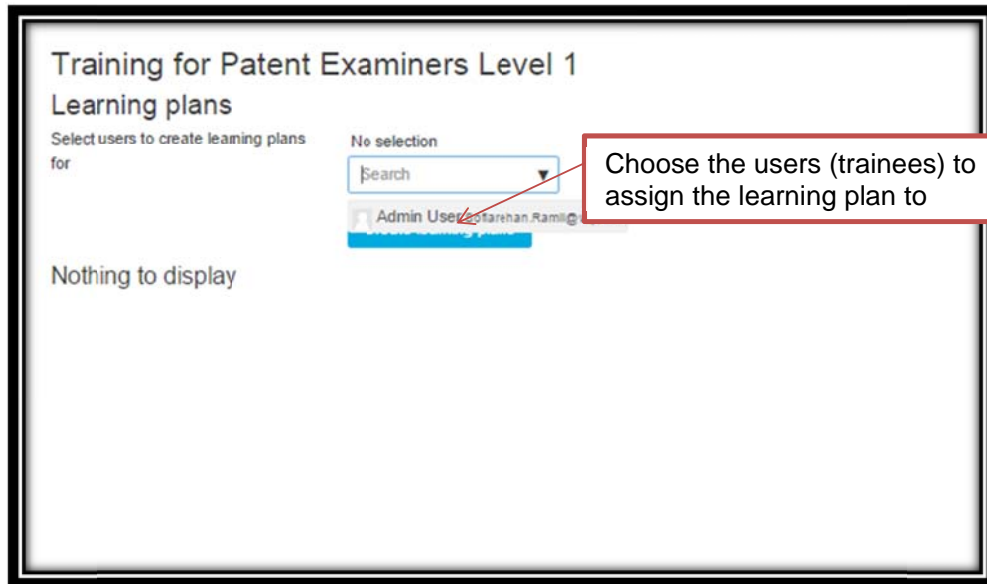
Similar steps can also be done to remove users from a cohort.

A user can be added to more than one cohort.

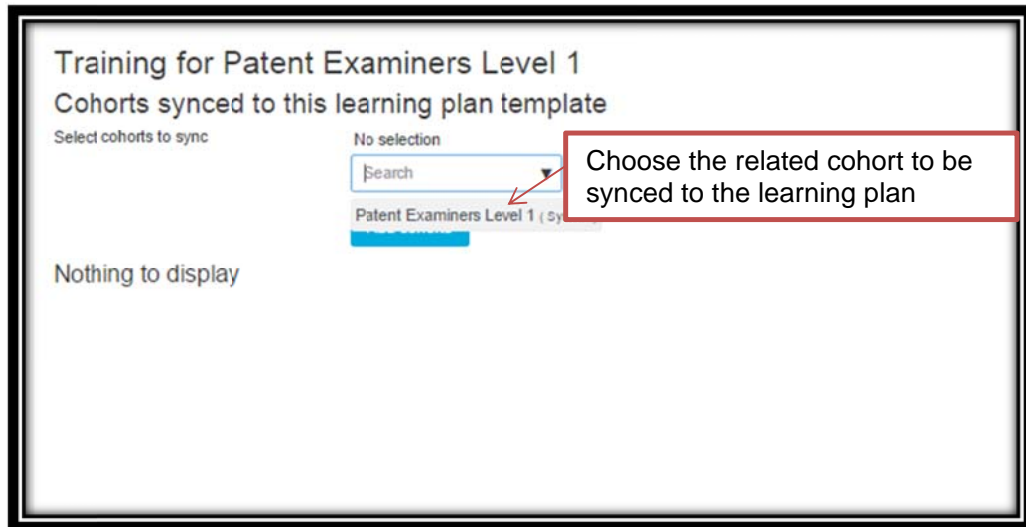
- v) Assigning a learning plan template to an individual or a cohort  
 To assign a learning plan to an individual or a cohort, go to:  
*Site administration > Competencies > Learning plan templates*



To assign the learning plan to an individual, click 'Edit' then click 'Create learning plan'



Similarly, to assign the learning plan to a cohort, click 'Edit' then click 'Add cohorts to sync'



After all has been completed, on the page of learning plan templates, viewers can see the number of cohorts and/or individuals assigned to the learning plan:

Patent Examination Training

Dashboard / Site administration / Competencies / Learning plan templates

### Learning plan templates

Add new learning plan template

#### List of learning plan templates

Name	Category	Cohorts	Learning plans	Actions
Training for Patent Examiners Level 1	System	1	1	Edit

Alternatively, adding a cohort or an individual can be done by clicking the number corresponding to cohorts or learning plans. For example, if an individual needs to be added to the learning plan template:

### Learning plan templates

Add new learning plan template

#### List of learning plan templates

Name	Category	Cohorts	Learning plans	Actions
Training for Patent Examiners Level 1	System	0	0	Edit

Click the number to add more individual

Dashboard > Site administration > Competencies > Learning plan templates > Training for Patent Examiners Level 1 > Learning plans

## Training for Patent Examiners Level 1

### Learning plans

Select users to create learning plans for

No selection

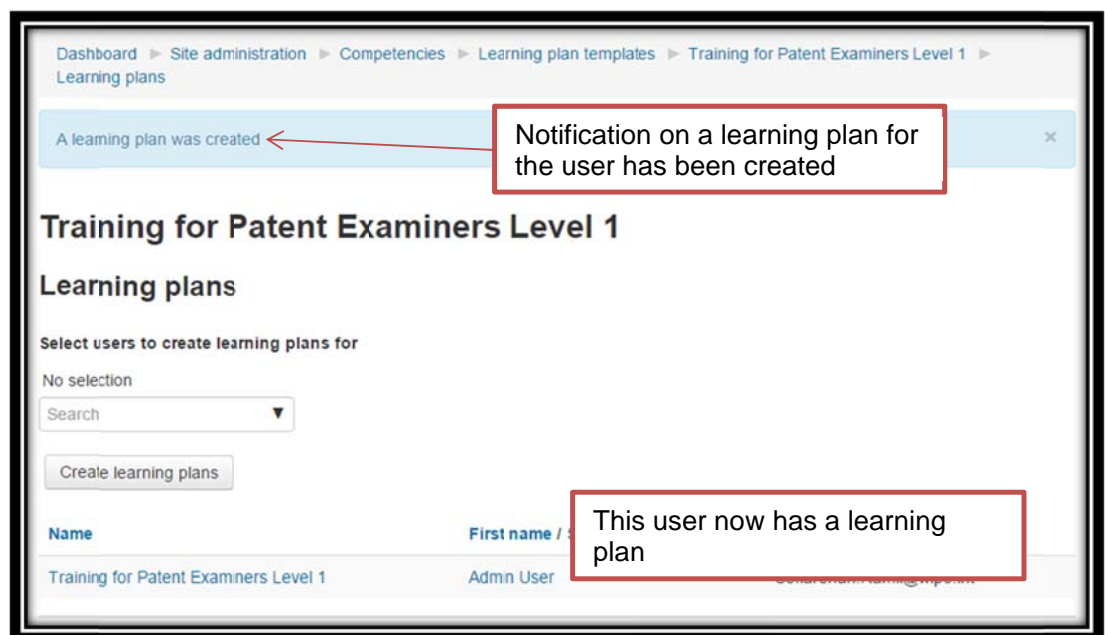
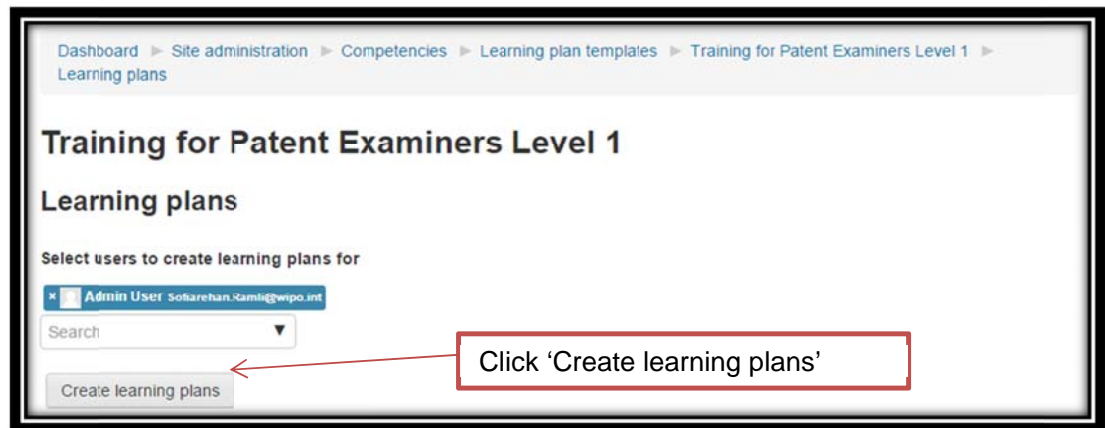
Search

Admin User Sofiarehan.Ramli@wipo.int

Nothing to display

Click the downward arrow where it will list all available users.

Click the users to be added to the learning plan



Similar step is also applicable for creating learning plan for cohorts.

A user can be assigned to more than one learning plan template, even when the learning plan templates have overlapping competencies. This is advantageous such as when there are different templates available for different work experience, technical background or different competency framework altogether.

**Examiner BBB**

Message + Add to your contacts

Dashboard > Users > Examiner BBB > Learning plans

### Learning plans

Add new learning plan

This user has two different learning plans assigned

### List of learning plans

Name	Template based	Status	Actions
Supplementary Learning Plan Template	Yes	Active	Edit
Training for Patent Examiners Level 1	Yes	Active	Edit

**FOR USERS / TRAINEES / EXAMINERS: VIEWING OWN LEARNING PLAN**

A user can view his/her learning plan from the profile page. One way to view the profile page is by clicking the down arrow next to profile picture on the top right of the page, then click 'Profile'.

Training Management Admin User

Dashboard

Profile

Grades

Messages

Preferences

Log out

Switch role to...

## Individualized and Competency based Patent Examiner Training Management

**WELCOME**

This is a test site for implementing the individualized and competency based patent examiner training management

**Mission**

The World Intellectual Property Organization promotes innovation and creativity for the economic, social and cultural development of all countries, through a balanced and effective international intellectual property system.

**Available courses**

Learning plans can be viewed by clicking 'Learning plans' under the 'Miscellaneous' tab.

**Admin User**

Dashboard > Profile

Reset page to default    Customise this page

**NAVIGATION**

- Dashboard
- Site home
- Site pages
- Courses

**ADMINISTRATION**

Site administration

Search

**User details** [Edit profile](#)

**Email address**  
Sofiarehan.Ramli@wipo.int

**Start date as a Patent Examiner**  
16 January 2006

**Relevant IPC classes**  
H02J

**Technical Qualification**  
BSc. in Electrical Engineering (majoring in Power)

**Reports**

- Today's logs
- All logs
- Outline report
- Complete report
- Browser sessions
- Grades overview
- Grade

**Login activity**

**First access to site**  
Tuesday, 9 January 2018, 1:51 PM (16 days 1 hour)

**Last access to site**  
Thursday, 25 January 2018, 3:34 PM (1 sec)

**Last IP address**  
0:0:0:0:0:0:1

**Miscellaneous**

- Blog entries
- Notes
- Forum posts
- Forum discussions
- Learning plans**

**Admin User**

Dashboard > Profile > Learning plans

**NAVIGATION**

- Dashboard
- Site home
- Site pages
- Courses

**ADMINISTRATION**

Site administration

Search

**Learning plans**

Add new learning plan

**List of learning plans**

Name	Template based	Status	Actions
Training for Patent Examiners Level 1	Yes	Active	Edit

Evidence of prior learning

Learning plan assigned to user

Alternatively, learning plan is also listed on the dashboard of a user (usually after the login page).

**Admin User**

Dashboard Customise this page

**NAVIGATION**

**Dashboard**

- Site home
- ▶ Site pages
- ▶ Courses

**LEARNING PLANS**

My plans

Training for Patent Examiners Level 1

**PRIVATE FILES**

No files available

Manage private files...

**ADMINISTRATION**

▶ Site administration

Search

**COURSE OVERVIEW**

Timeline Courses

**ONLINE USERS**

(last 5 minutes: 1)

Admin User

**LATEST BADGES**

You have no badges to display

Dashboard ▶ Profile ▶ Learning plans ▶ Training for Patent Examiners Level 1

**NAVIGATION**

**Dashboard**

- Site home
- ▶ Site pages
- ▶ Courses

## Training for Patent Examiners Level 1

For newly-recruited patent examiners

**Status**  
Active (Complete this learning plan)

**Learning plan template**  
Training for Patent Examiners Level 1 (Unlink from learning plan template)

**Progress**  
0 out of 4 competencies are proficient 0.0%

▶ Comments (0)

### Learning plan competencies

Name	Rating	Proficient	Status	Actions
Nature and function of IP rights 1.1 <small>Path: Training for PatentExaminers / 1</small>	-	No	-	Edit ▼
Function of international and national IP offices 1.2 <small>Path: Training for PatentExaminers / 1</small>	-	No	-	Edit ▼
Laws, treaties and conventions governing international and national patent systems 1.3 <small>Path: Training for PatentExaminers / 1</small>	-	No	-	Edit ▼
Function and processes of patent examination and the role of patent examiners 1.4 <small>Path: Training for PatentExaminers / 1</small>	-	No	-	Edit ▼

List of competencies under the assigned learning plan

## 6. CREATING A COURSE

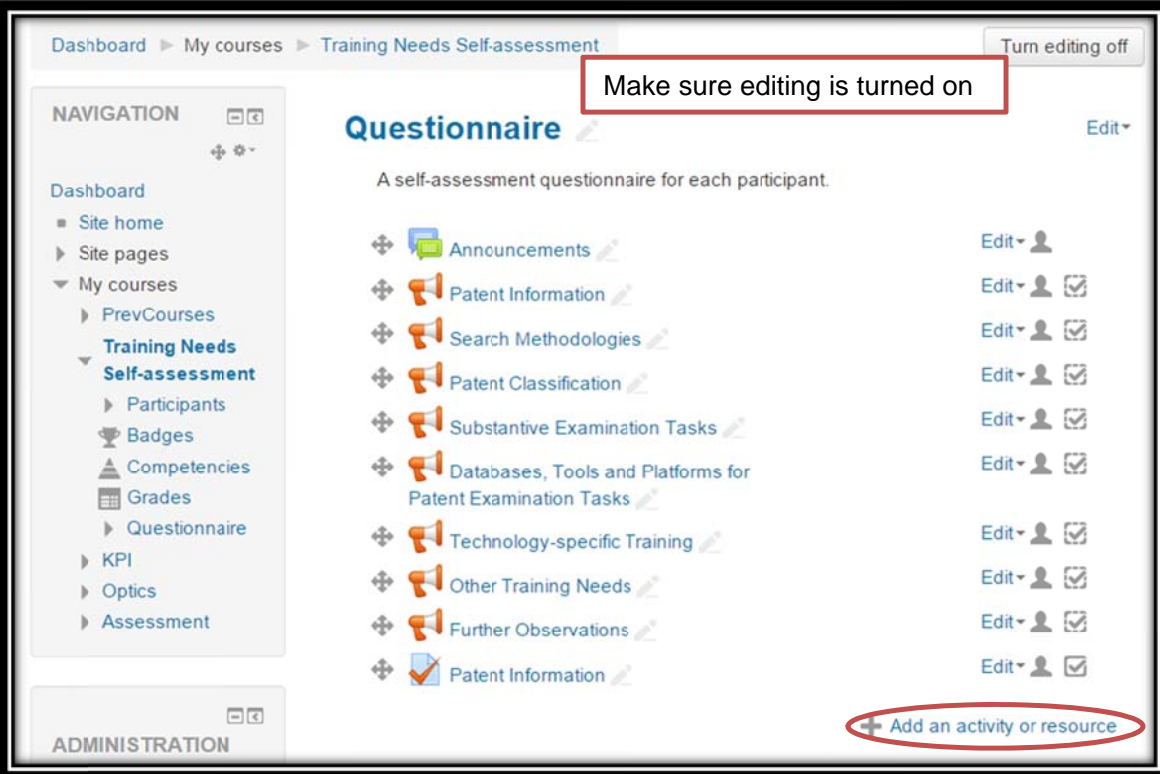
After setting up users and their learning plan, the next step is to manage their training and competency. Although the primary objective of this LMS is to monitor and measure these examiners' performance and not developing own online courses, performance measurement is conducted through reports and analysis. In Moodle, these reports and analysis can be obtained by means of a course. Although it is called a course, technically for patent office's purposes, the course is a way to monitor the examiner's performances as all activities and resources can easily be developed in a course.

More information about creating courses can be found here:

<https://docs.moodle.org/33/en/Courses>.

### SELF-ASSESSMENT

Coordinators can develop a customized self-assessment questionnaire by utilizing the various activities available for a course. The self-assessment questionnaire can also be analyzed and extracted for future reference. After creating a course, an administrator (or any users with similar permissions) can add activities in the course by clicking 'Add an activity or resource'. Please make sure that editing is turned on in order to make is possible to add activities or resources.



The screenshot shows the Moodle course interface for 'Training Needs Self-assessment'. The page title is 'Questionnaire' and it includes a sub-header 'A self-assessment questionnaire for each participant.' A list of activities is displayed, including 'Announcements', 'Patent Information', 'Search Methodologies', 'Patent Classification', 'Substantive Examination Tasks', 'Databases, Tools and Platforms for Patent Examination Tasks', 'Technology-specific Training', 'Other Training Needs', 'Further Observations', and 'Patent Information'. Each activity has an 'Edit' button with a user icon and a checkmark. A red box highlights the text 'Make sure editing is turned on' in the top right corner. At the bottom right, a red circle highlights the '+ Add an activity or resource' button. The left sidebar shows the course navigation menu, and the top right corner has a 'Turn editing off' button.

A popup will appear, listing all possible activities and resources that can be included in the course.

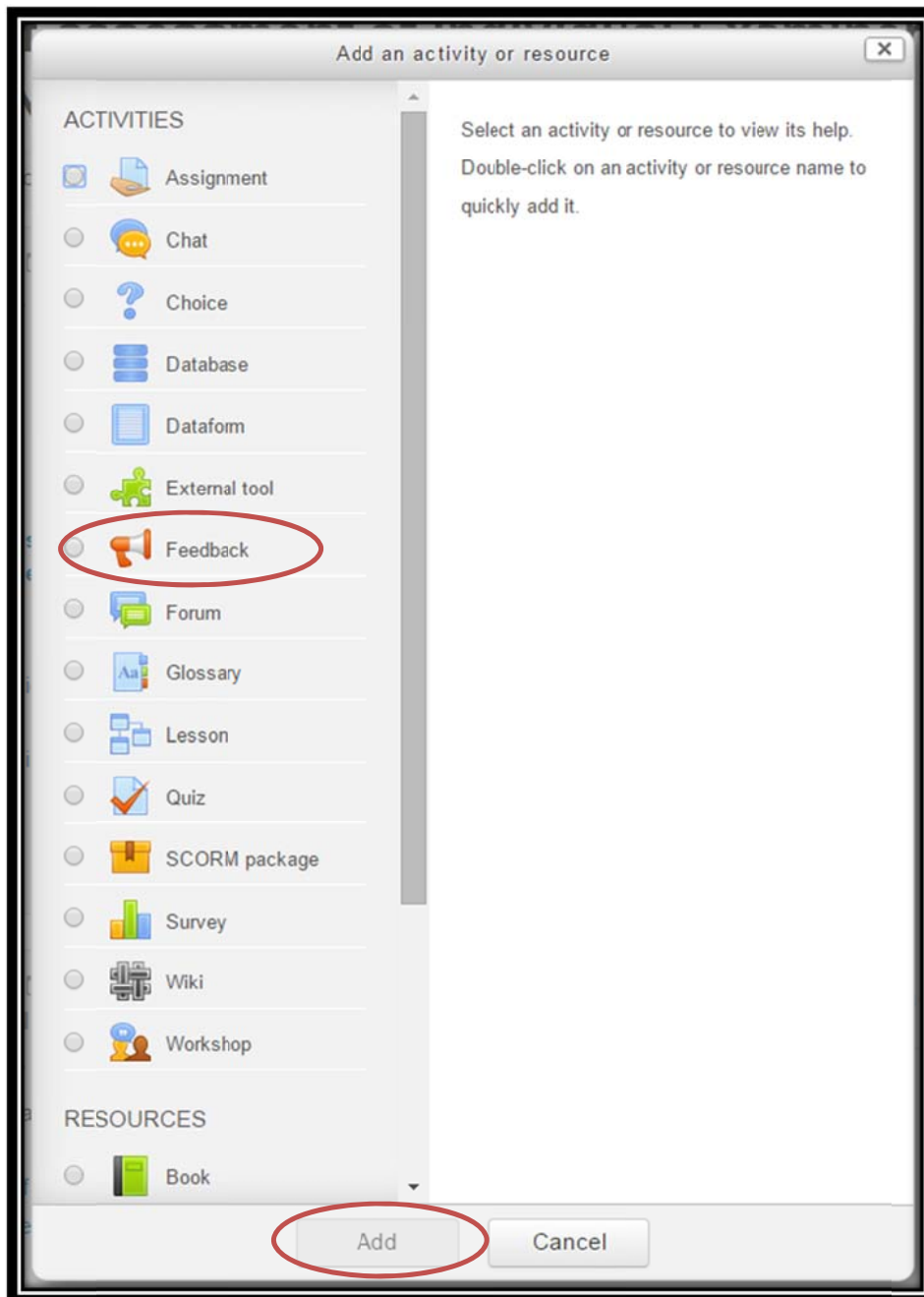
A brief explanation for each type of activity can be found here:

<https://docs.moodle.org/33/en/Activities>. A brief explanation for each type of resource can be found here: <https://docs.moodle.org/33/en/Resources>.



Normally, the type of activity is determined from the intended outcome. If there is an expected correct answer, most probably a quiz type activity is preferred. If the questionnaire is in the form of dichotomous, three-point or five-point scale, the suitable activity would be of feedback type. If the questionnaire is directed to survey after a course/training/lesson, most probably survey-type activity is preferred (please bear in mind that survey-type activity has its own default fixed questions).

In this example, a feedback-type activity is preferred. Click 'Feedback' and then 'Add' to proceed.



Give a title for the activity, and any other settings suitable. For example, the activity can be made such that users can answer anonymously, multiple times, and so on. Click either save button to continue.

The screenshot shows a configuration interface for a course activity, divided into several sections:

- General**:
  - Name \***: A text input field containing "Patent Information".
  - Description**: A rich text editor with a toolbar containing icons for text alignment, bold, italic, bulleted list, numbered list, link, unlink, image, video, and document. Below the toolbar is a large empty text area.
  - Display description on course page**: A checkbox that is currently unchecked, with a help icon to its right.
- Availability**: A section header with a right-pointing arrow.
- Question and submission settings**:
  - Record user names**: A dropdown menu currently set to "User's name will be logged and shown with answers".
  - Allow multiple submissions**: A checkbox that is currently unchecked, with a help icon to its right.

## EXTRACTING DATA FROM THE COURSE

Depending on the type of activities chosen, a coordinator can obtain an analysis of answers by users enrolled in the course. As an example, if a weighted scale response using feedback

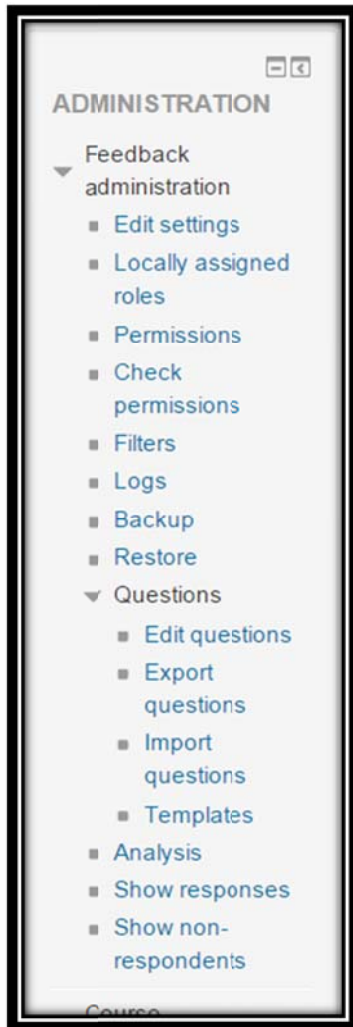
type is used, a coordinator can collect data on all responses from the 'Analysis' tab on the activity. The responses can also be exported to Excel, by clicking 'Export to Excel'.



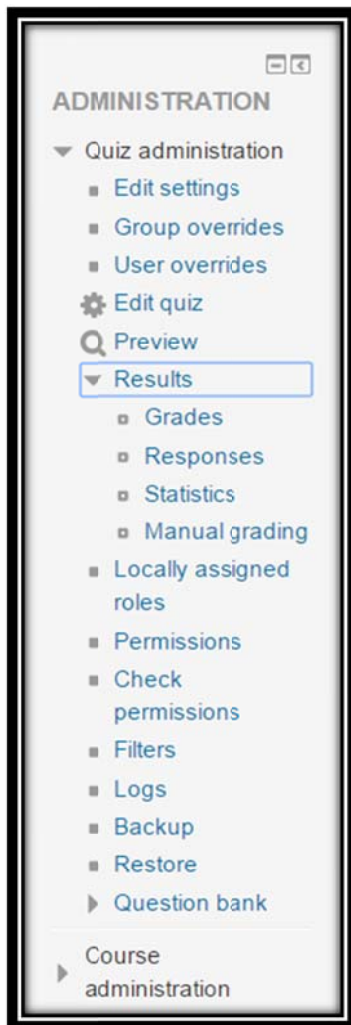
An example of the Excel file showing the feedback response is shown below.

Tuesday, 13 March 2018, 11:25 AM					
Feedback: 3					
Questions: 9					
Label	Question	Responses			
	Name and explain the different par	I am confident to	I feel somehow c	I have never had	Average
		1	1	1	2
	Explain types and categories of cl	I am confident to	I feel somehow c	I have never had	Average
		2	1	0	2.66666667
	Explain application, publication an	I am confident to	I feel somehow c	I have never had	Average
		1	1	1	2
	Explain the different types of pate	I am confident to	I feel somehow c	I have never had	Average
		1	1	1	2
	Determine the meaning of a given	I am confident to	I feel somehow c	I have never had	Average
		2	1	0	2.66666667
	Explain the concept of INID codes	I am confident to	I feel somehow c	I have never had	Average
		2	1	0	2.66666667
	Explain what WIPO Standards are	I am confident to	I feel somehow c	I have never had	Average
		1	2	0	2.33333333
	Explain what authoritative (primar	I am confident to	I feel somehow c	I have never had	Average
		1	1	1	2
	Explain the difference between 'pu	I am confident to	I feel somehow c	I have never had	Average
		1	1	1	2

This analysis can also be accessed via the feedback administration section in the administration block.



For a quiz type of activity, there is a quiz administration section available in the administration block. Under the 'Results' tab, a coordinator can view overall grades and statistics. The report can also be downloaded in various formats.



The image shows a vertical sidebar menu for quiz administration. At the top right of the menu area are two small icons: a square with a minus sign and a square with a plus sign. Below these is the title 'ADMINISTRATION' in bold. The menu items are as follows:

- ▼ Quiz administration
  - Edit settings
  - Group overrides
  - User overrides
- ⚙ Edit quiz
- 🔍 Preview
- ▼ Results (highlighted with a blue border)
  - Grades
  - Responses
  - Statistics
  - Manual grading
- Locally assigned roles
- Permissions
- Check permissions
- Filters
- Logs
- Backup
- Restore
- ▶ Question bank

---

▶ Course administration

Dashboard > My courses > Assessment > Priorities > Priority Assessment Test > Results > Statistics

**NAVIGATION**

- Dashboard
  - Site home
  - Site pages
- My courses
  - PrevCourses
  - Training Needs
  - Self-assessment
  - KPI
  - Optics
  - Assessment
    - Participants
    - Badges
    - Competencies
    - Grades
    - General
    - Priorities
      - Priority Assessment Test**
      - Patent Families
      - PCT Related
      - Other

**ADMINISTRATION**

- Quiz administration

## Priority Assessment Test

No attempts have been made at this quiz, or all attempts have questions that need manual grading.

Statistics calculation settings

Calculate statistics from  
highest graded attempt

Show report

### Quiz information

Download full report as Comma separated values (.csv) Download

Quiz name	Assessment Test
Course name	e Assessment Test
Number of complete graded first attempts	0
Total number of complete graded attempts	0

## 7. CREATING A QUIZ / FEEDBACK IN MOODLE

Moodle is also equipped with custom activities such as a quiz or a feedback. As mentioned earlier, since Moodle is aimed for delivery of blended online learning, these activities must be incorporated in a course. To learn more about creating activity in a course, please refer here: [https://docs.moodle.org/34/en/Managing\\_a\\_Moodle\\_course](https://docs.moodle.org/34/en/Managing_a_Moodle_course)

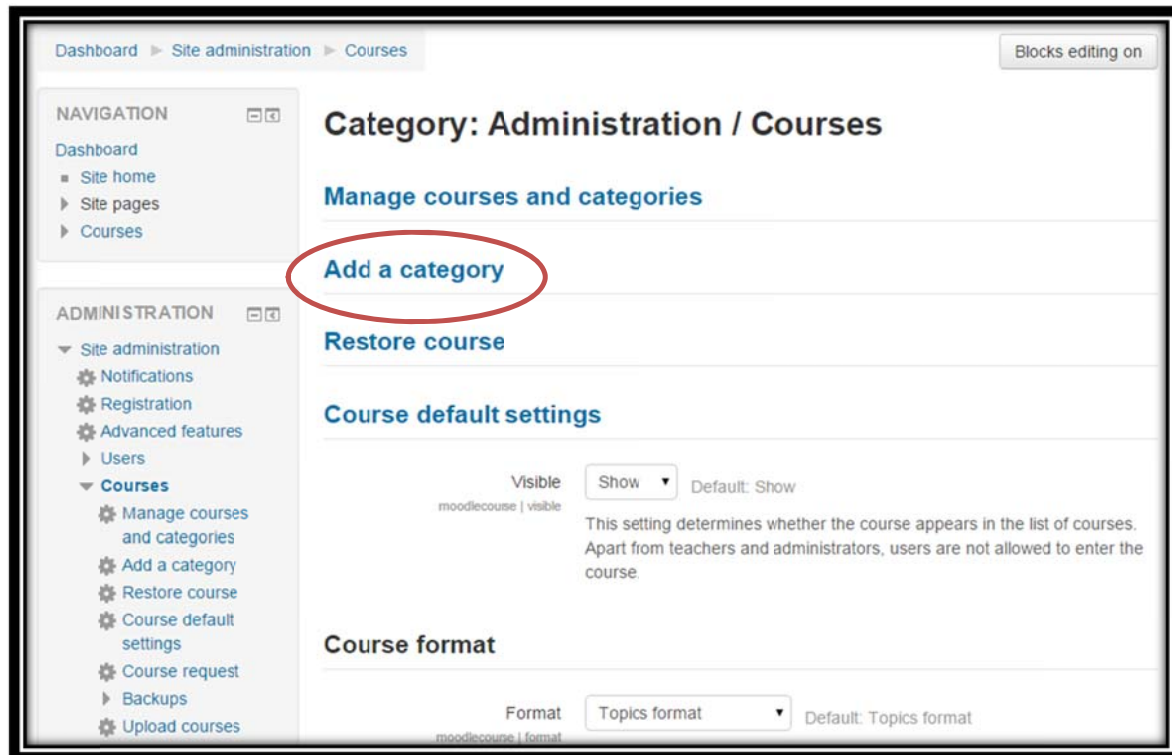
Moodle also supports importing a quiz from a Word document, which makes incorporating existing standalone quiz into Moodle a breeze. A demonstration on importing a quiz from a Word document can be found here: <https://www.youtube.com/watch?v=6R1TM6IGrCQ>

## 8. IMPORTING A COURSE TO MOODLE

Apart from creating a course from scratch, Moodle also allows importing a course to be uploaded to the site. For example, if WIPO or any other patent office is interested to conduct a questionnaire or survey, the questionnaire / survey can be uploaded to the Moodle site (in the form of a course) and it can then be accessed by users.

### ADDING A CATEGORY / CREATE NEW CATEGORY

To go to course settings, go to *Site administration* > *Courses*. By default a 'Miscellaneous' category is already created. To add a new category, click 'Add a category':





## Add new category

**Parent category**

Top

If it is a main category, choose 'Top'. If the new category is a subcategory, choose the existing category

**Category name \***

Prior Learning

Name of the new category

**Category ID number** ?

**Description**

Description of the new category (optional)

Any course related to recognition of prior learning is in here.

Draft saved.

**Create category** Cancel

Click 'Create category'.

## Course and category management

Viewing: [Course categories and courses](#) ▾

### Course categories

[Create new category](#)

<input type="checkbox"/>	▪ <a href="#">Miscellaneous</a>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	▪ <a href="#">Prior Learning</a>	The new category is now listed			<input type="checkbox"/>

**Sorting**

▾

▾

▾

---

**Move selected categories to**

▾

### IMPORTING / RESTORING A COURSE


In this example, a preset questionnaire will be uploaded to the site. Since the title of the questionnaire is ....., preferably the suitable category is 'Prior Learning'. To upload a course, go to *Site administration > Courses > Restore course*.

The easiest way is to drag the previously downloaded file to the big white box (if using any browser other than Internet Explorer). Alternatively, click 'Choose a file...' and choose the file:

## Import a backup file

Files \*

Choose a file...



Drag the downloaded file to here

You can drag and drop files here to add them.

Restore

There are required fields in this form marked \* .

### Course backup area ?

Filename	Time	Size	Download	Restore
----------	------	------	----------	---------

## Import a backup file

Files \*

Choose a file...

backup-moodle2-course-6-training\_needs\_self-assessment-20180115-1522-nu.mbz

Restore

Click 'Restore'










**Course details**

**Title** Training Needs Self-assessment

**Original ID** 6

**Course sections**

**Section: Questionnaire** Included in backup (no user information)

Activities	Module	Title	Userinfo
 Forum		Announcements	✗
 Feedback		Patent Information	✗
 Feedback		Search Methodologies	✗
 Feedback		Patent Classification	✗
 Feedback		Substantive Examination Tasks	✗
 Feedback		Databases, Tools and Platforms for Patent Examination Tasks	✗
 Feedback		Technology-specific Training	✗
 Feedback		Other Training Needs	✗
 Feedback		Further Observations	✗

Click 'Continue' to proceed

Usually the imported course is a new course. So, under the header 'Restore as a new course', click the category corresponding to the course (in this case, it is Prior Learning), then click 'Continue'.

The imported course may also be a new course replacing an existing course. If that is the case, under the header 'Restore into an existing course', choose either the new course will be merged into the existing course, or replace by deleting the existing course. Choose the course intended to be replaced, and then click 'Continue'.

1. Confirm ▶ 2. Destination ▶ 3. Settings ▶ 4. Schema ▶ 5. Review ▶ 6. Process ▶ 7. Complete

## Restore as a new course

Restore as a new course

Select a category

Name	Description
Miscellaneous	
<input checked="" type="radio"/> Prior Learning	Any course related to recognition of prior learning is in here.

Choose the category, then click 'Continue'

**or**

## Restore into an existing course

Merge the backup course into the existing course

Delete the contents of the existing course and then restore

Select a course

Course short name	Course full name
<input checked="" type="radio"/> Training Management	Individualized and Patent Examiner

Choose the course to be replaced, then click 'Continue'

Choose whether importing the course would also import several items in the original course. By default, everything is also included in the import. Click 'Next' to proceed.

1. Confirm ▶ 2. Destination ▶ 3. **Settings** ▶ 4. Schema ▶ 5. Review ▶ 6. Process ▶ 7. Complete

### Restore settings

<b>Include enrolled users</b>	✗
Include enrolment methods	No ▼
<b>Include user role assignments</b>	✗
Include activities and resources	☑
Include blocks	☑
Include filters	☑
<b>Include comments</b>	✗
<b>Include badges</b>	✗
Include calendar events	☑
<b>Include user completion details</b>	✗
<b>Include course logs</b>	✗
<b>Include grade history</b>	✗
Include groups and groupings	☑
Include competencies	☑

Cancel Next

The imported course has its own details (name, start date), but administrator is free to edit them. Click 'Next' to proceed.

Course name

Course short name

Course start date

Select [All / None \(Show type options\)](#)

Questionnaire	User data	No
Announcements	-	No
Patent Information	-	No
Search Methodologies	-	No
Patent Classification	-	No
Substantive Examination Tasks	-	No
Databases, Tools and Platforms for Patent Examination Tasks	-	No
Technology-specific Training	-	No
Other Training Needs	-	No
Further Observations	-	No

Click 'Perform restore' to proceed.

**Course settings**

**Course name** WIPO Self-assessment of Individual Examiner Training Needs

**Course short name** Training Needs Self-assessment

**Course start date** Thursday, 1 February 2018, 12:00 AM

Questionnaire	✓	User data	No
Announcements	✓	-	No
Patent Information	✓	-	No
Search Methodologies	✓	-	No
Patent Classification	✓	-	No
Substantive Examination Tasks	✓	-	No
Databases, Tools and Platforms for Patent Examination Tasks	✓	-	No
Technology-specific Training	✓	-	No
Other Training Needs	✓	-	No
Further Observations	✓	-	No

Previous    Cancel    **Perform restore**

Click 'Continue' to proceed.

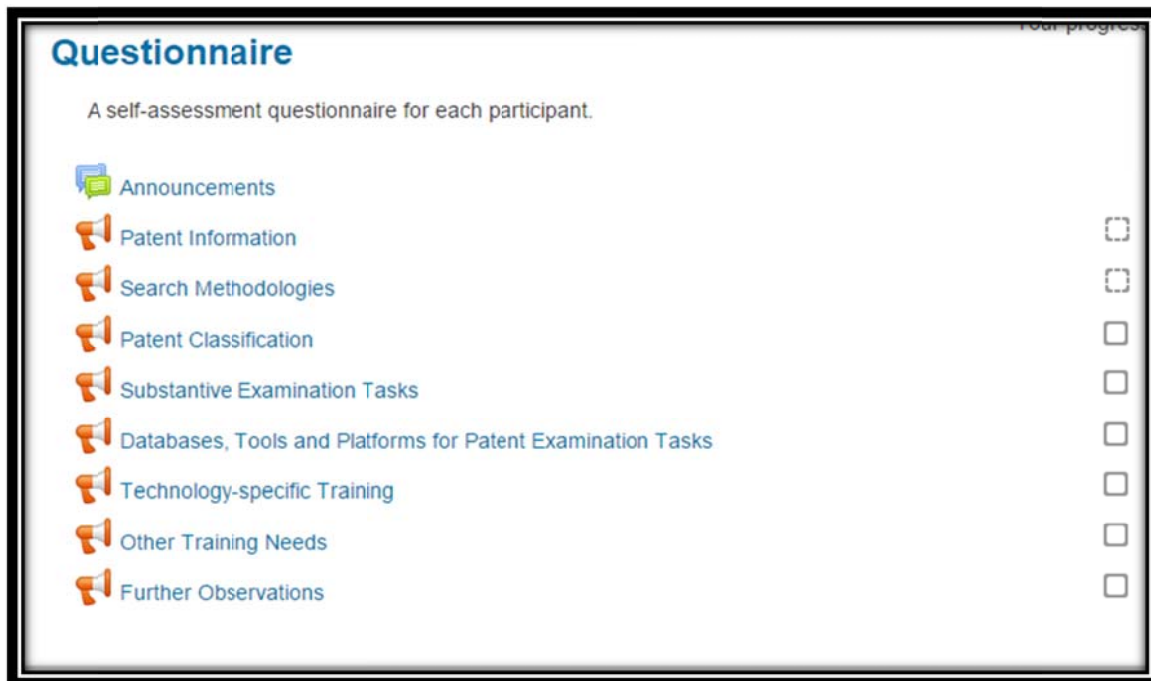
1. Confirm ▶ 2. Destination ▶ 3. Settings ▶ 4. Schema ▶ 5. Review ▶ 6. Process ▶ 7. Complete

The course was restored successfully, clicking the continue button below will take you to view the course you restored. ×

Continue

The questionnaire can now be answered by users.

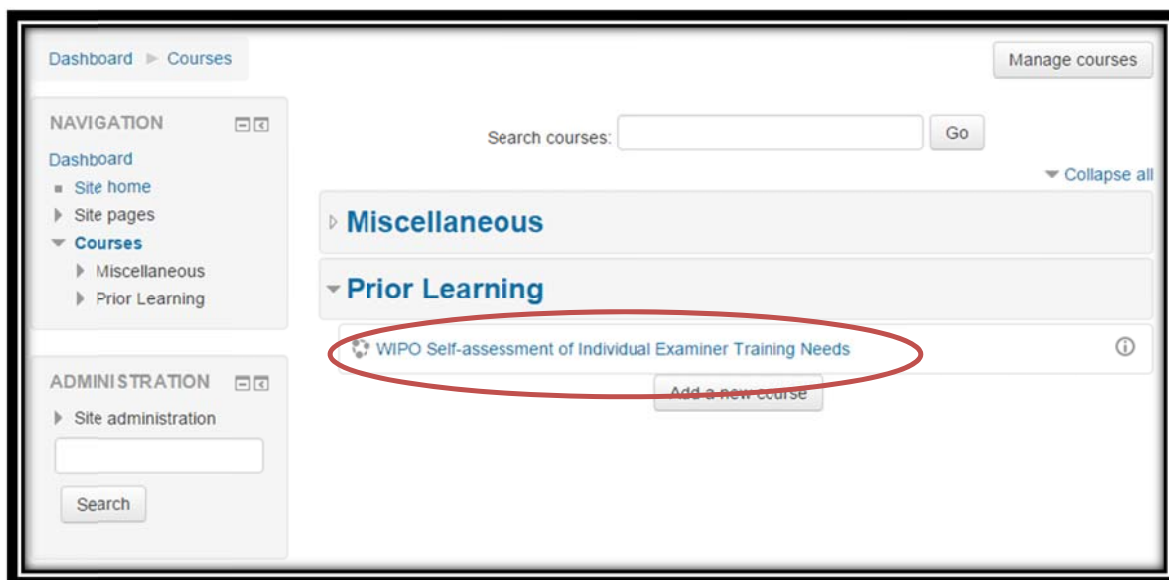




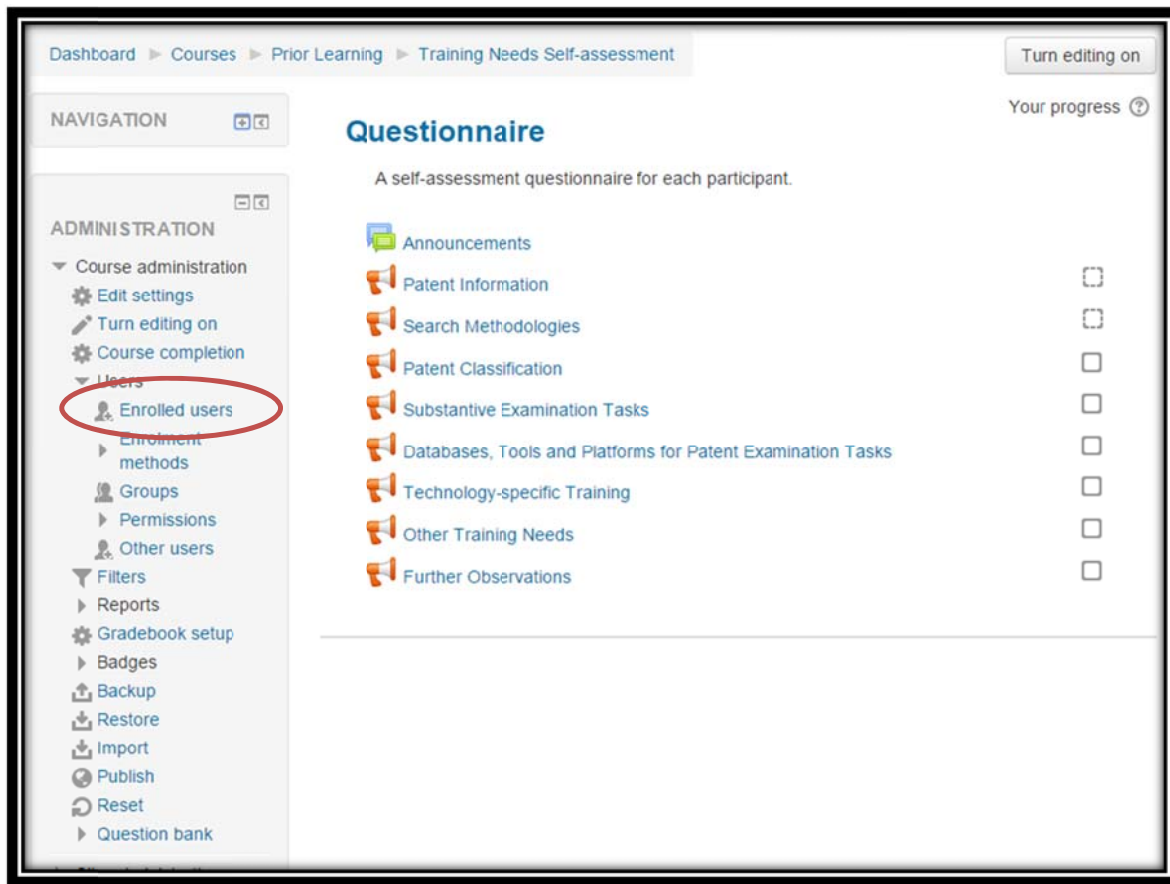
#### ADDING / MODIFYING COMPETENCIES OF A COURSE

#### ENROLLING A USER TO A COURSE

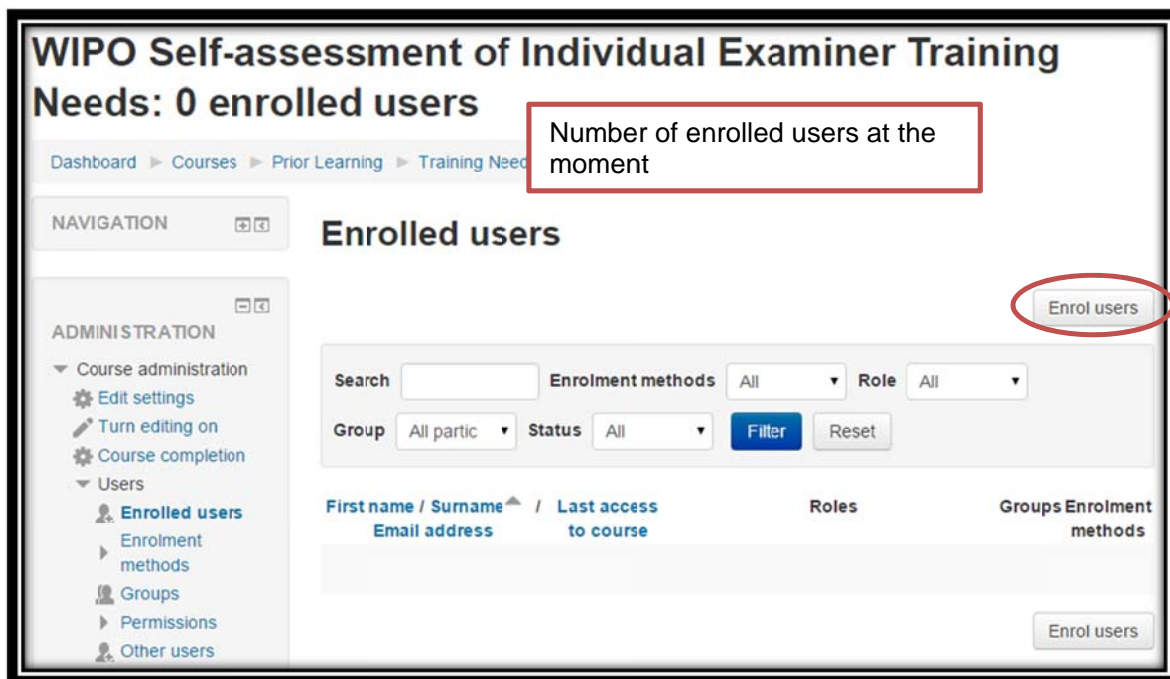
Once a course has been created, an administrator can enroll a user to the course. Open the course page and click the desired course:



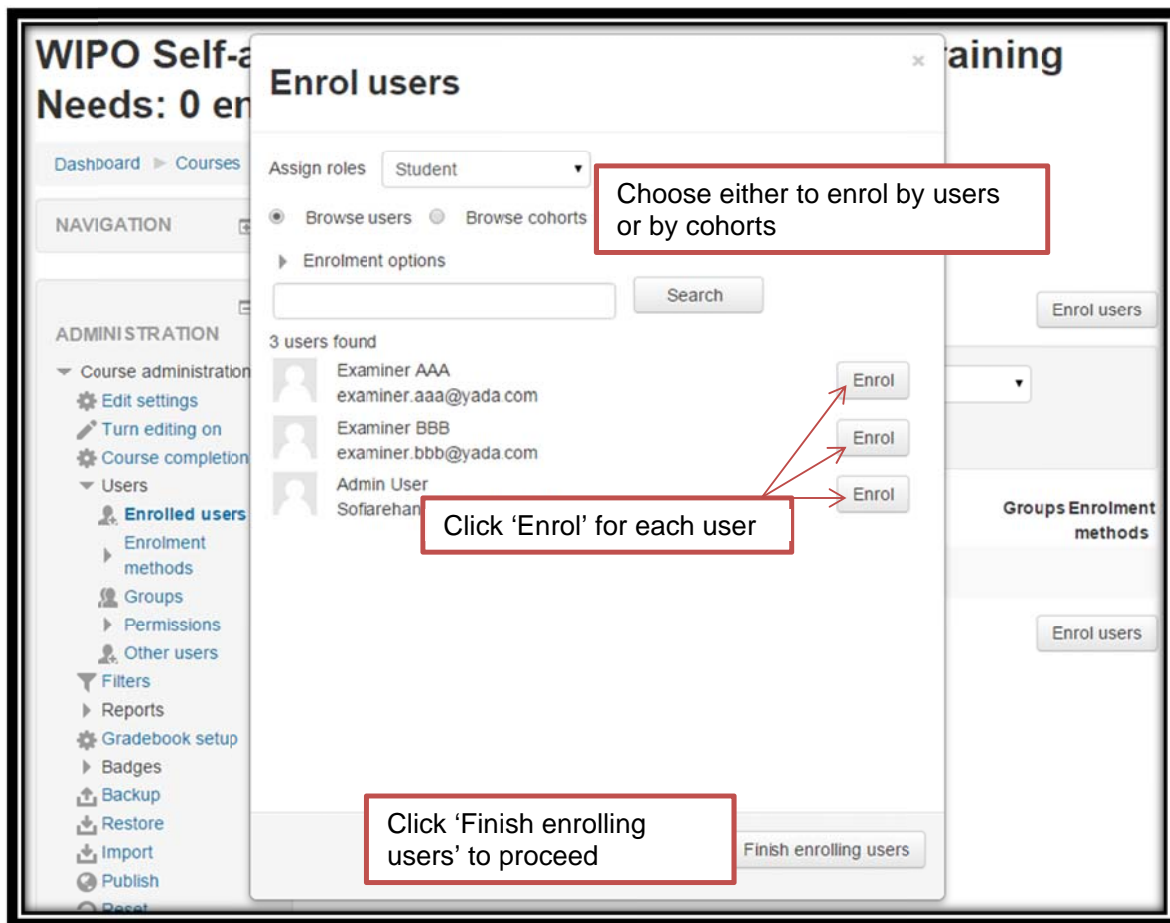
On the course page in the 'Administration' block, there will be a header called 'Course administration'. Go to *Users > Enrolled users*.



The main title will display how many enrolled users for the course. In this example, currently there is no user enrolled. To add / enroll users, click 'Enrol users'.



A pop-up will appear, listing available users to be enrolled to the course. Administrator can also simultaneously assign roles to the user, e.g. student, teacher, and manager. Other than enrolling individual users to the course, administrator can also enrol a cohort to the course by choosing 'Browse cohorts' instead of 'Browse users'. Click 'Enrol' for each user / cohort.



*Note: A user can also enroll himself / herself if self-enrolment is enabled for a course.*

The course now will be updated to list the enrolled users.

# WIPO Self-assessment of Individual Examiner Training Needs: 2 enrolled users

Dashboard > Courses > Prior Learning > Training Needs Self-assessment > Users > Enrolled users

NAVIGATION

## Enrolled users





Enrol users

ADMINISTRATION

- Course administration
  - Edit settings
  - Turn editing on
  - Course completion
- Users
  - Enrolled users**
    - Enrolment methods
  - Groups
  - Permissions
  - Other users
- Filters
- Reports
- Gradebook setup
- Badges
- Backup
- Restore
- Import
- Publish
- Reset

Search  Enrolment methods All Role All

Group All partic Status All

First name / Surname Email address	Last access to course	Roles	Groups	Enrolment methods
 Examiner AAA examiner.aaa@yada.com	Never	Student <input checked="" type="checkbox"/>		Manual enrolments from Tuesday, 23 January 2018, 4:11 PM <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
 Examiner BBB examiner.bbb@yada.com	Never	Student <input checked="" type="checkbox"/>		Manual enrolments from Tuesday, 23 January 2018, 4:23 PM <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

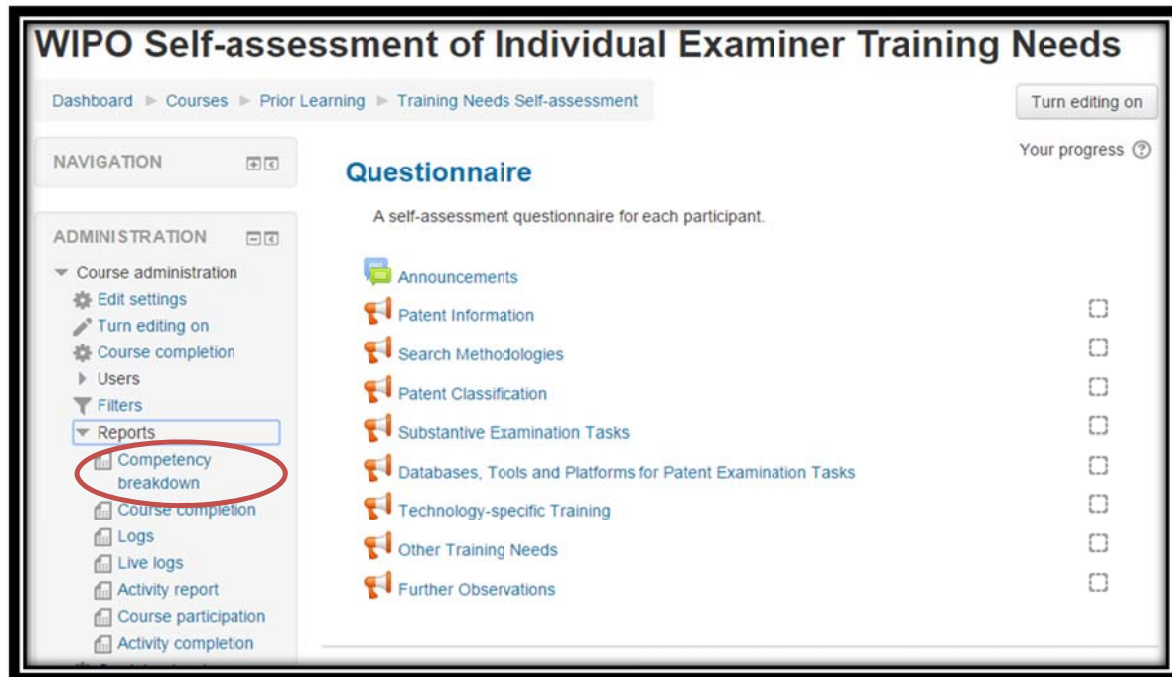
Enrol users

## 9. REPORTS IN MOODLE

### 10. REVIEWING COMPETENCIES

#### VIEWING REPORT AND GIVING RATING OF ENROLLED USERS

An administrator, a teacher and other permitted users can view report of each enrolled users in a course. With Moodle, the reports can be broken down according to competencies linked to the course. Under 'Course administration', go to *Reports > Competency breakdown*.



Report is broken down according to competencies relevant to the course, and also displayed for each user who is taking the course.

If a teacher / manager is satisfied in the user's performance in the course, the teacher / manager can indicate that the user is competent by giving the appropriate rating for each competency. To rate the user, click the word 'Not rated' for the competency to be rated.

Dashboard > Courses > Prior Learning > Training Needs Self-assessment > Reports > Competency breakdown

NAVIGATION

- Dashboard
- Site home
- Site pages
- Courses
  - Prior Learning
  - Training Needs Self-assessment
    - Participants
    - Badges
    - Competences
    - Grades
    - Questionnaire
  - Miscellaneous

ADMINISTRATION

- Course administration
  - Edit settings
  - Turn editing on

Examiner AAA

Message Add to your contacts

Examiner AAA

Jump to user

Examiner BBB

### Competency breakdown

Competency ratings in this course are updated im

Competency	Rating
Work-Sharing 8	Not rated
Undertake Searches and Patent Examination under Supervision within a National Context 11	Not rated
Independently Undertake Complex Searches and Examinations within a National Context 12	Not rated

Click this arrow to switch between users

Click here to change the rating of the competency

A pop-up window will appear, indicating that at the moment the user is not proficient in the competency, and also no rating has been given.

Dashboard > Courses > Prior Learning > Training Needs Self-assessment > Reports > Competency breakdown

NAVIGATION

ADMINISTRATION

Work-Sharing 8

Training for Patent Examiners - Competency

Path: Training for Patent Examiners /

Cross-referenced competencies:

No other competencies have been cross-referenced to this competency.

Activities

No activities

User

Examiner AAA

Proficient

No

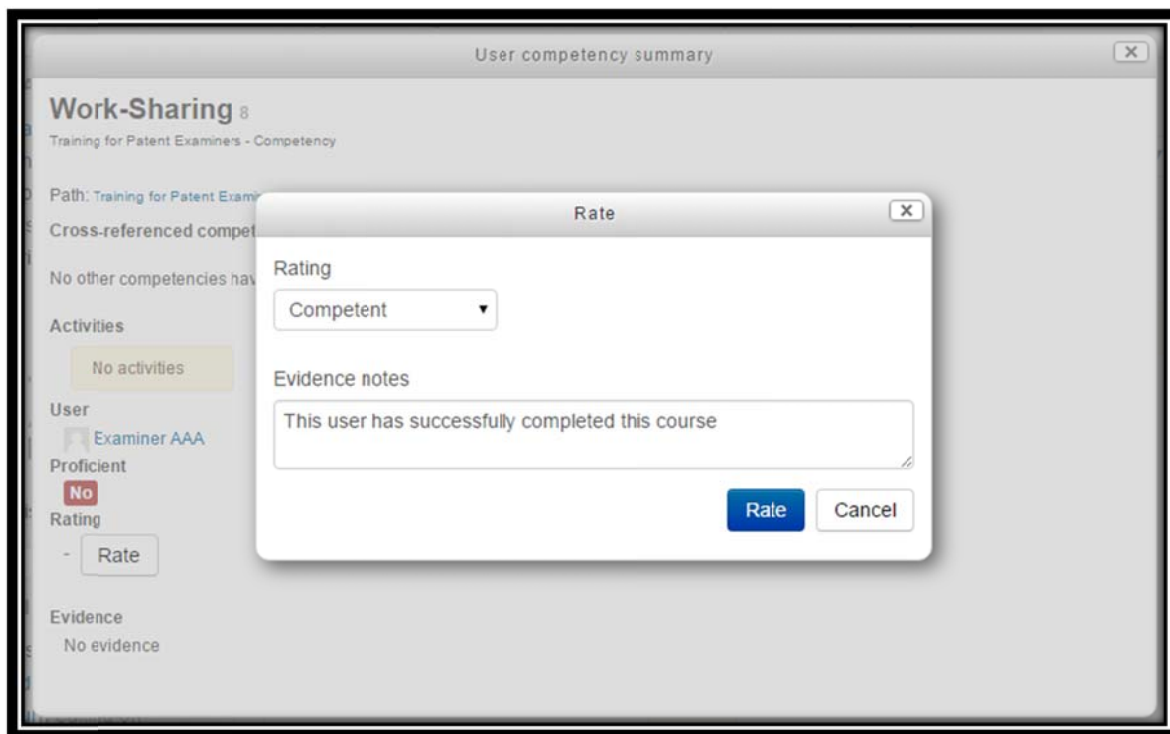
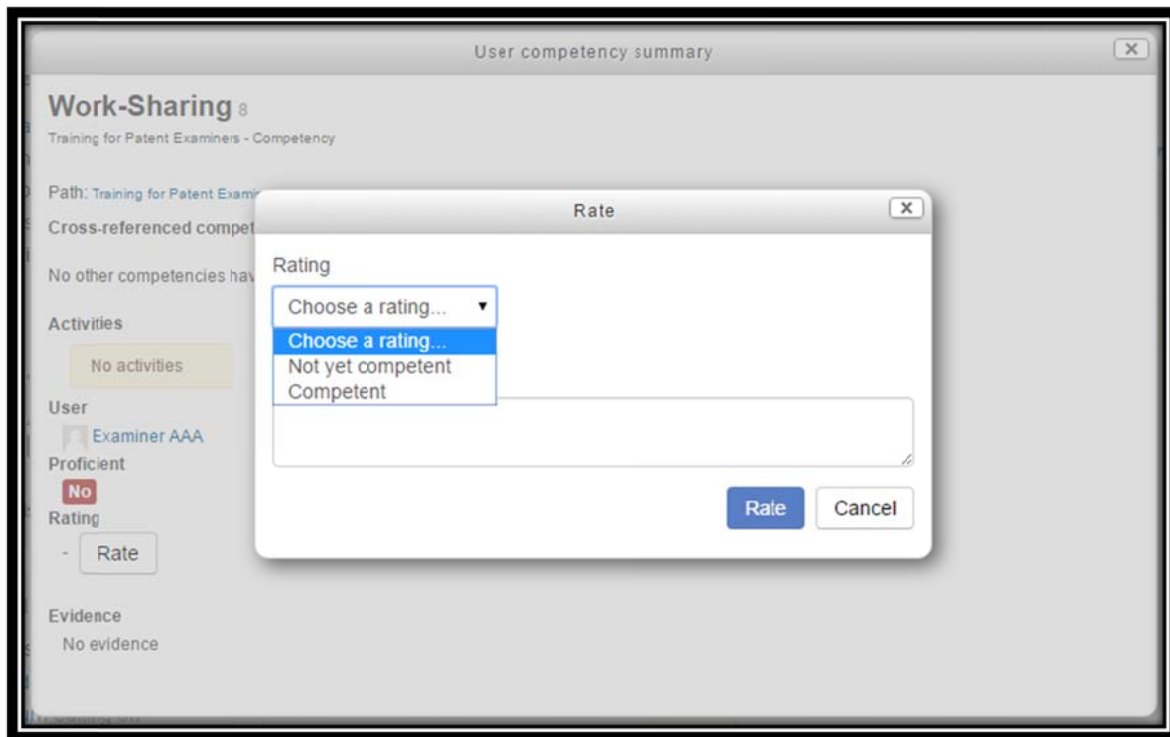
Rating

- Rate

Evidence

No evidence

To give rating to the user, click the word 'Rate'. Another pop-up window will appear, and in this window, the teacher / manager can give rating (either competent or not yet competent), with evidence notes.



After that, the user is indicated as proficient in the competency, with a 'Competent' rating.

User competency summary

### Work-Sharing 8

Training for Patent Examiners - Competency

Path: [Training for Patent Examiners /](#)

Cross-referenced competencies:

No other competencies have been cross-referenced to this competency.

Activities

No activities

User

Examiner AAA

Proficient

Yes

Rating

Competent

Evidence

Admin User

Thursday, 25 January 2018, 4:32 PM

**Competent**

The competency rating was manually set in the course 'Course: WIPO Self-assessment of Individual Examiner Training Needs'.

This user has successfully completed this course

Consequently, in the competency breakdown report, the particular competency for the user is rated as 'Competent'.

Dashboard > Courses > Prior Learning > Training Needs Self-assessment > Reports > Competency breakdown

NAVIGATION

Dashboard

- Site home
- Site pages
- Courses
  - Prior Learning
    - Training Needs Self-assessment**
      - Participants
      - Badges
      - Competencies
      - Grades
      - Questionnaire
    - Miscellaneous

ADMINISTRATION

- Course administration
  - Edit settings

Examiner AAA

Message + Add to your contacts

Examiner AAA

Jump to user

### Competency breakdown

Competency ratings in this course are updated immediately in learning plans.

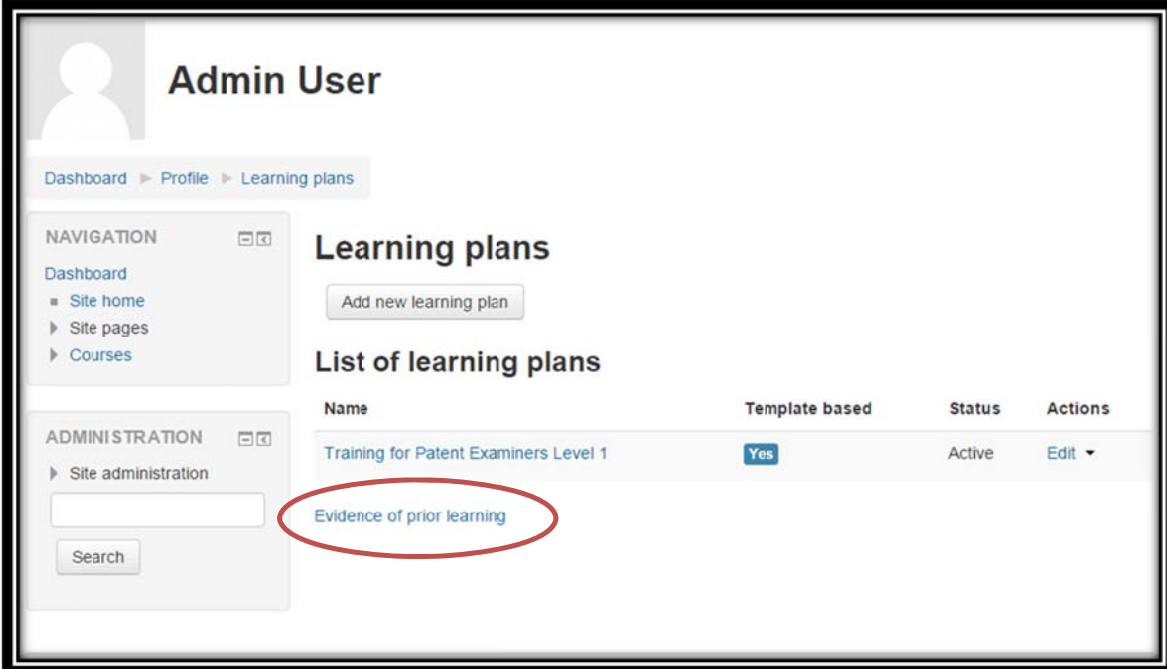
Competency	Rating
Work-Sharing 8	Competent
Undertake Searches and Patent Examination under Supervision within a National Context 11	Not rated
Independently Undertake Complex Searches and Examinations within a National Context 12	Not rated



## FOR USERS: SUBMITTING EVIDENCE OF PRIOR LEARNING

Since there are competencies that are not relevant to any of the available courses, examiners can submit own evidence indicating that they are already competent in that particular competency. Administrators / Managers can also review this evidence and decide whether the evidence is enough to demonstrate proficiency of the competency, or ask the examiners to submit more evidence.

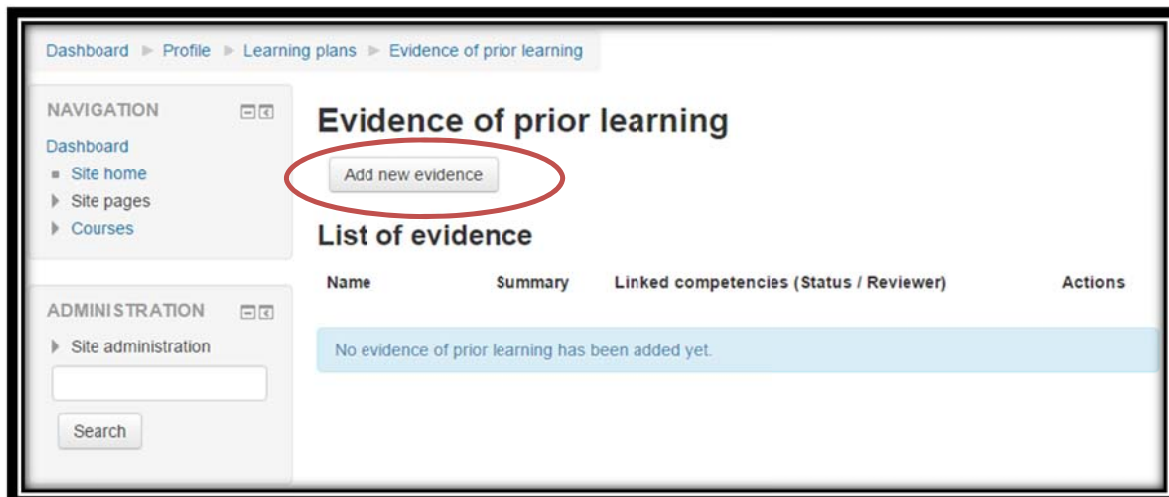
For a user to upload the evidence, go to the learning plan from the profile page. Click 'Evidence of prior learning'.



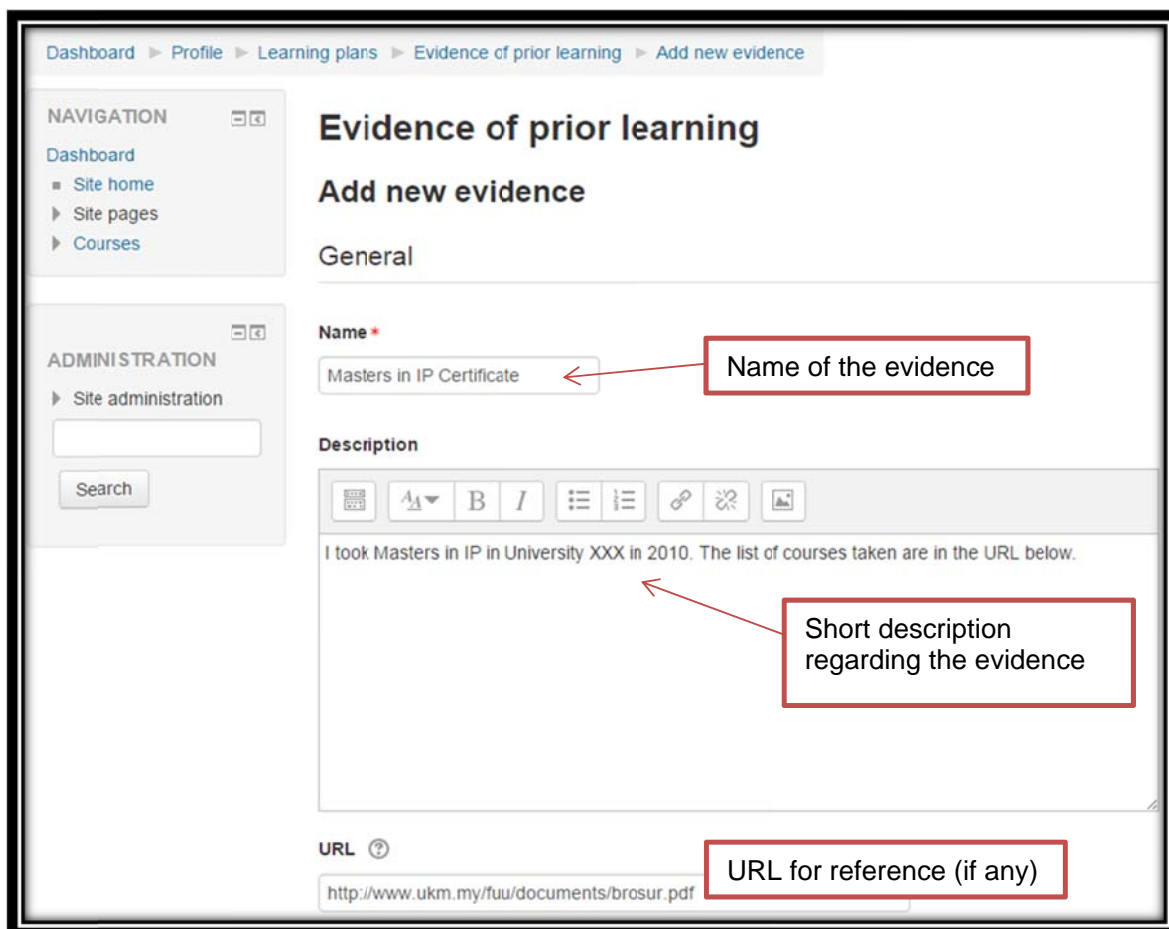
The screenshot shows the 'Admin User' profile page. The user is logged in as 'Admin User'. The page has a navigation menu on the left with 'Dashboard', 'Profile', and 'Learning plans'. The 'Learning plans' section is active, showing a table of learning plans. The table has columns for 'Name', 'Template based', 'Status', and 'Actions'. The first row is 'Training for Patent Examiners Level 1', which is 'Yes' for 'Template based' and 'Active' for 'Status'. Below the table, there is a link 'Evidence of prior learning' which is circled in red. There is also an 'Add new learning plan' button above the table.

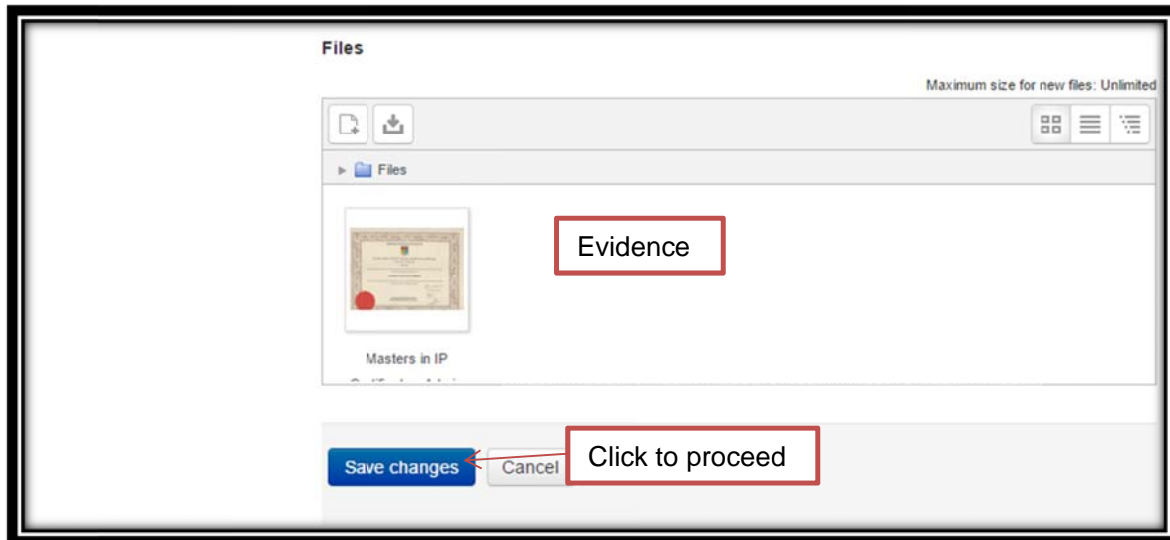
Name	Template based	Status	Actions
Training for Patent Examiners Level 1	Yes	Active	Edit ▾

This page will display all evidence of prior learning. In this particular example, the user has never submitted any evidence. To upload evidence, click 'Add new evidence'.



In the next page, insert an appropriate title for the evidence to be uploaded, along with a description of the evidence. It is also possible to include a URL for further reference. In this example, the user has a Master in Intellectual Property, so he is uploading the certificate, and a URL to the list of courses under the program.

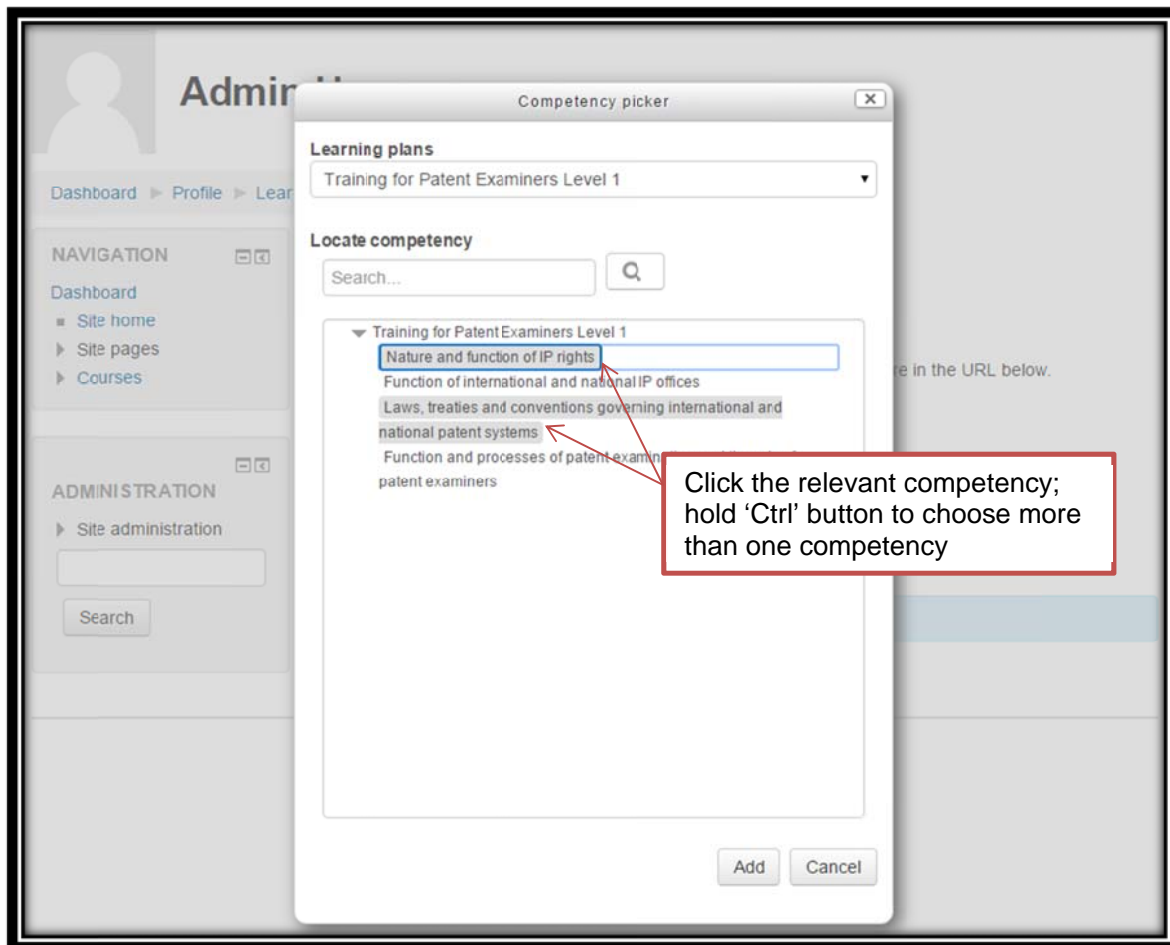




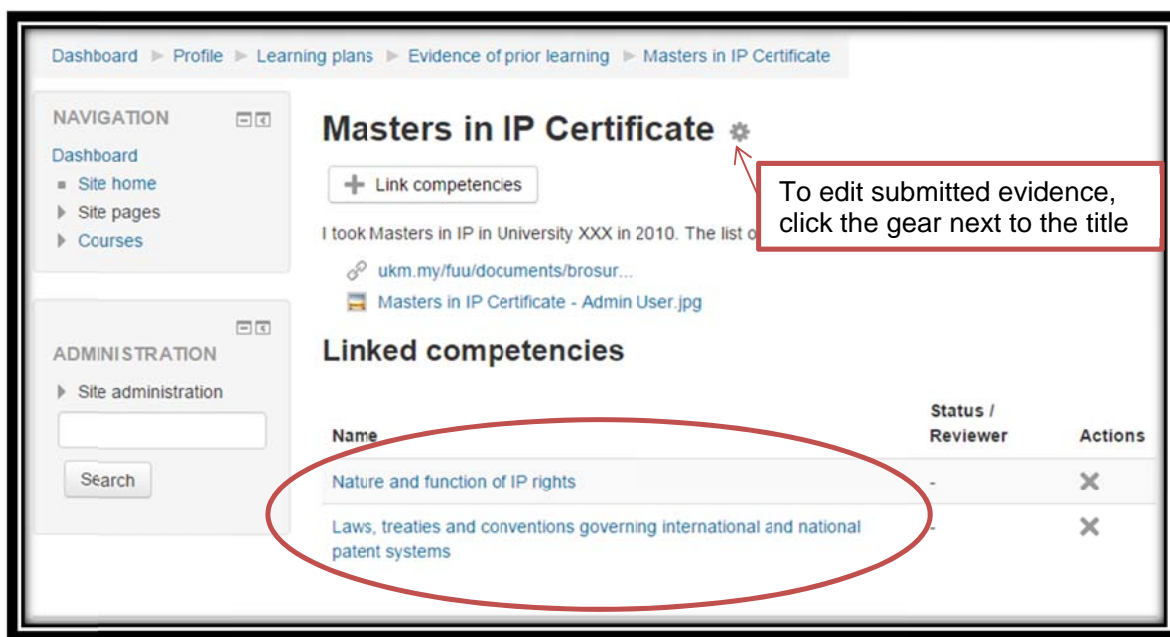
After saving the changes, the uploaded document(s) will be displayed. To link related competencies to this evidence, click 'Link competencies'.



A pop-up window will appear, showing the competencies listed under the assigned learning plan. The user can click the competencies that are related to the evidence submitted.

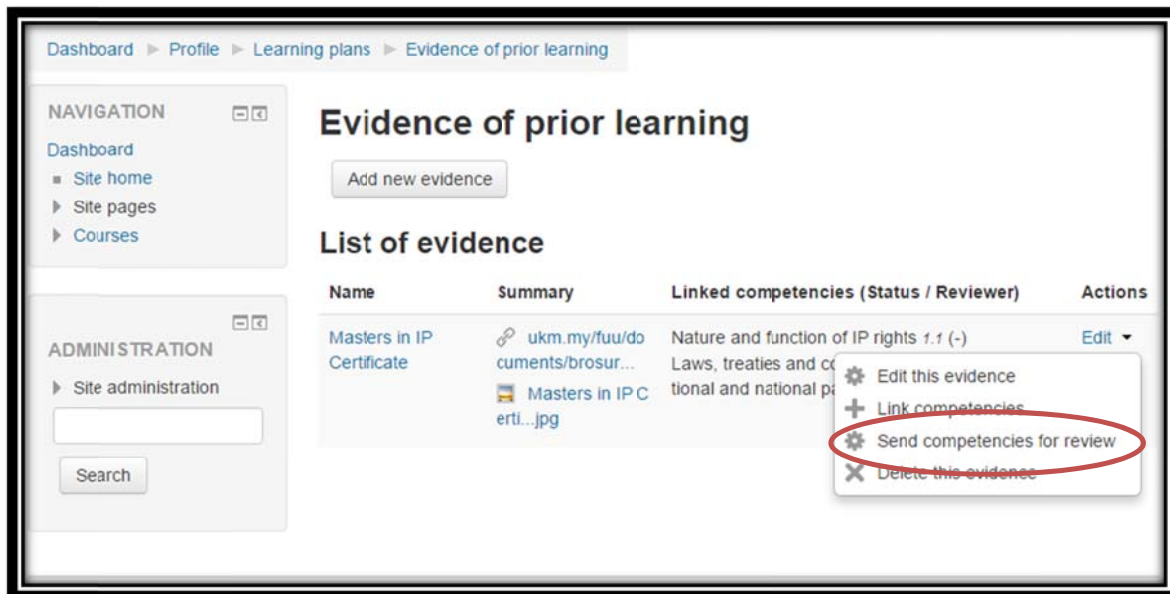


Once added, the linked competencies will be displayed under the evidence submitted.



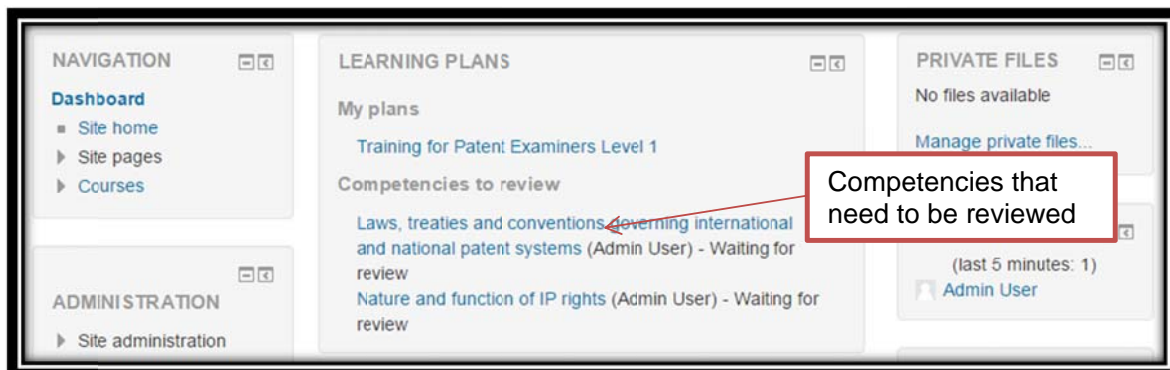
The user can request for the evidence submitted to be reviewed. In order to do so, go to *Profile > Learning Plans > Evidence of prior learning*. Or from the page earlier, click the word 'Evidence of prior learning' tab.

Click 'Edit' under the 'Actions' tab, where a drop-down menu will appear. Choose 'Send competencies for review'.

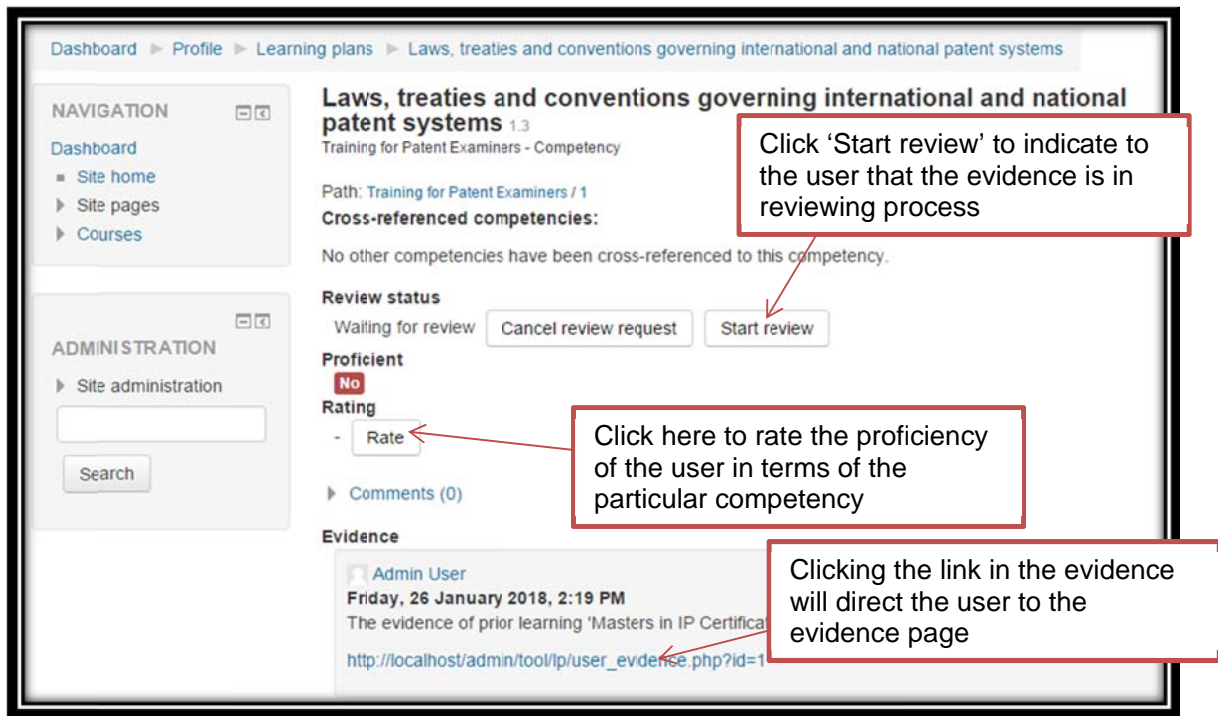


#### FOR TEACHERS / MANAGERS: REVIEWING EVIDENCE OF PRIOR LEARNING

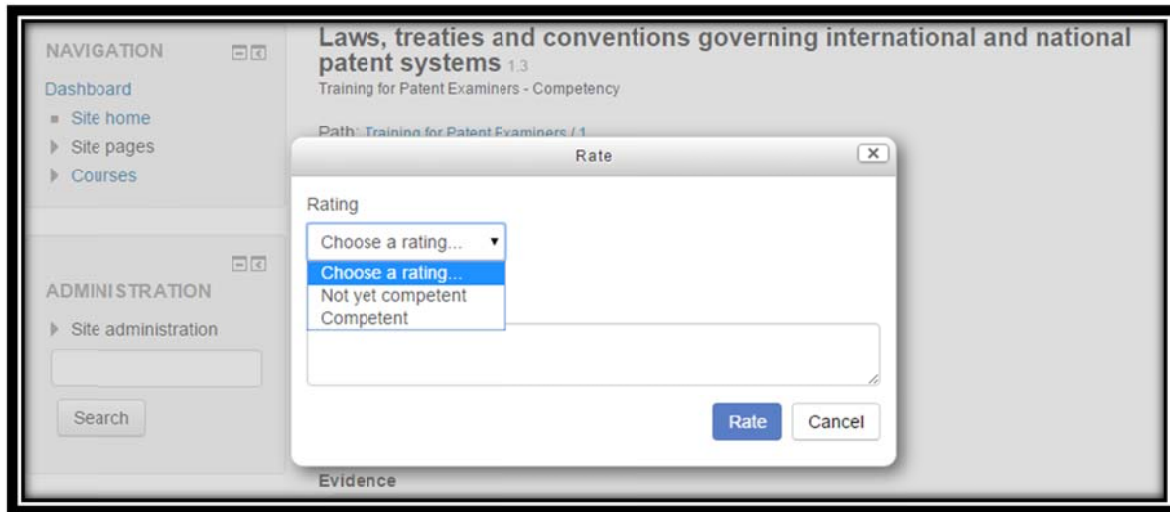
Anybody with the capability to view learning plans can see which users have requested reviews and for which competencies.



Clicking the competency will open the competency and list of evidence to be reviewed submitted by a user.



Similar to reviewing competency breakdown report, each user can be rated either competent or not yet competent for each competency.



The user is now proficient in the particular competency and the administrator / teacher can click 'Finish review' to finish the process.

Dashboard > Profile > Learning plans > Laws, treaties and conventions governing international and national patent systems

**NAVIGATION**

Dashboard

- Site home
- Site pages
- Courses

**ADMINISTRATION**

Site administration

### Laws, treaties and conventions governing international and national patent systems <sup>1.3</sup>

Training for Patent Examiners - Competency

Path: Training for Patent Examiners / 1

**Cross-referenced competencies:**

No other competencies have been cross-referenced to this competency.

**Review status**

In review - Admin User

**Proficient**

Yes

**Rating**

Competent

[Comments \(0\)](#)

**Evidence**

Admin User

Friday, 26 January 2018, 4:12 PM

**Competent**

The competency rating was manually set.

Admin User

Friday, 26 January 2018, 2:19 PM

The evidence of prior learning 'Masters in IP Certificate' was linked.


[http://localhost/admin/tool/ip/user\\_evidence.php?id=1](http://localhost/admin/tool/ip/user_evidence.php?id=1)

The below screenshot is what the user who requested for his evidence to be review would see in his 'Learning plans' page. One of the competencies has been rated competent.

NAVIGATION 

Dashboard

- ▀ Site home
- Site pages
- Courses

ADMINISTRATION 

- Site administration

Search

# Training for Patent Examiners Level 1

For newly-recruited patent examiners

**Status**

Active (Complete this learning plan)

**Learning plan template**

Training for Patent Examiners Level 1 (Unlink from learning plan template)

**Progress**

1 out of 4 competencies are proficient

25.0 %

▸ Comments (0)

## Learning plan competencies

Name	Rating	Proficient	Status	Actions
Nature and function of IP rights 1.1 Path: Training for Patent Examiners / 1	-	No	Waiting for review	Edit ▾
Function of international and national IP offices 1.2 Path: Training for Patent Examiners / 1	-	No	-	Edit ▾
Laws, treaties and conventions governing international and national patent systems 1.3 Path: Training for Patent Examiners / 1	Competent	Yes	-	Edit ▾
Function and processes of patent examination and the role of patent examiners 1.4 Path: Training for Patent Examiners / 1	-	No	-	Edit ▾



## 11. WORKAROUNDS IN MOODLE

Although at first glance it seems that Moodle is more geared towards blended online learning, it is easy to customize Moodle to be a useful LMS tool. These topics below will address some of the needs that can easily be achieved in Moodle.

### COMPILING DATA OF EXAMINERS

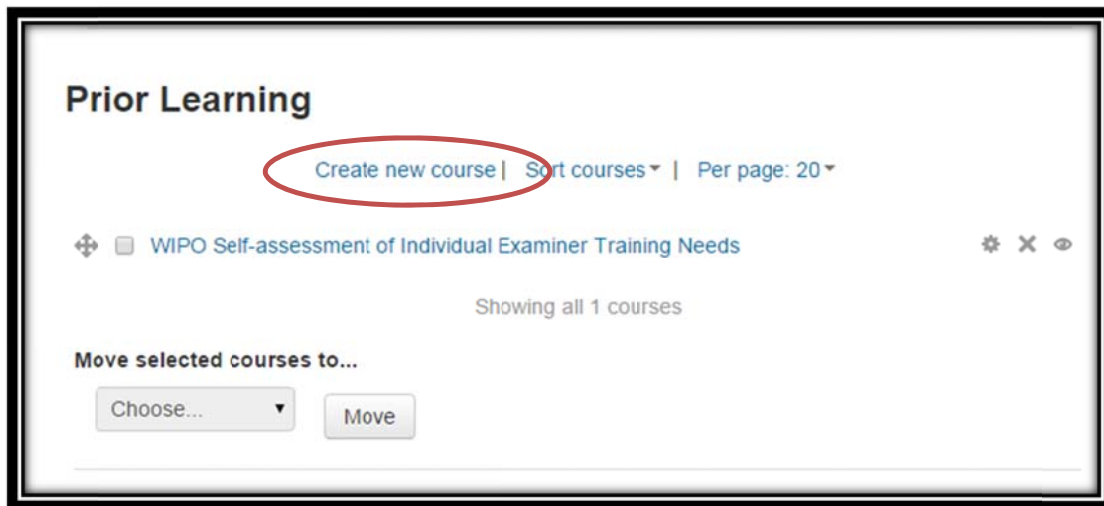
In a patent office, often the number of trainings attended serves as a performance indicator of an examiner for a manager. A manager sometimes needs to know the trainings that an examiner has attended in order to determine the career path of the examiner, or to determine eligibility of the examiner to be nominated to another training course.

In Moodle, this can be incorporated in the form of a course. For example, a course entitled "Previous courses attended" can be created, where all courses attended by examiners per year can be compiled, and the data can be downloaded in .csv or .xls format.

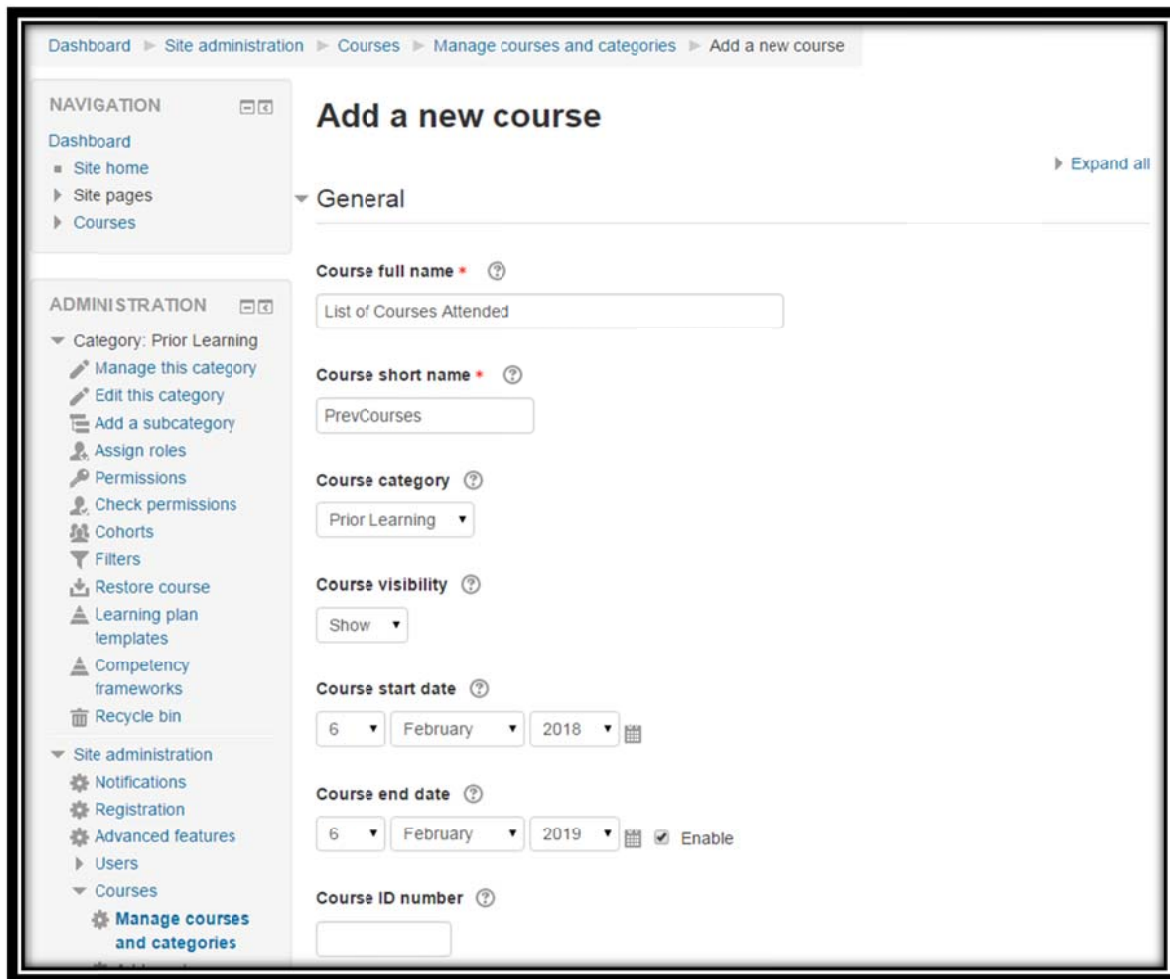
#### Creating a New Course

Go to *Site administration > Courses > Manage courses and categories*.

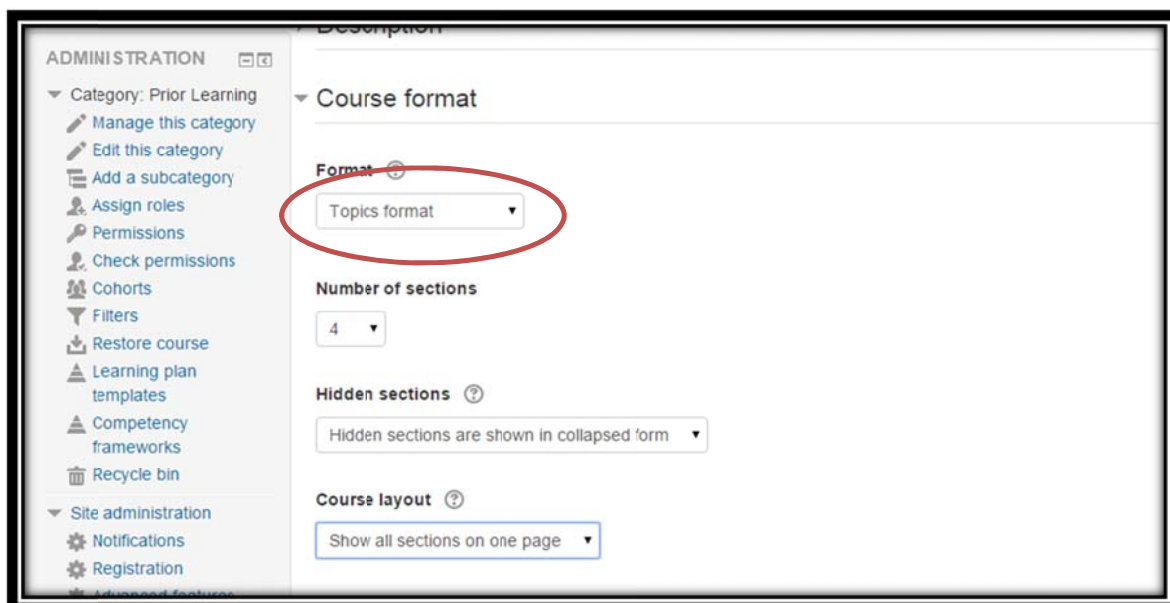
Click the category for the course, then click 'Create new course'. In this example, this new course will be under the 'Prior Learning' category.



Put the appropriate full and short names for the course.

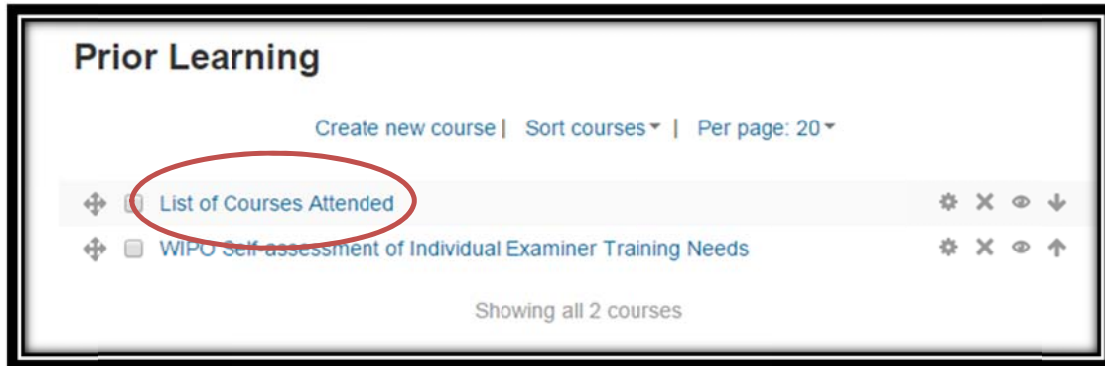


It is recommended that topics format is chosen for this course. However, administrators / managers are free to choose any other appropriate format.

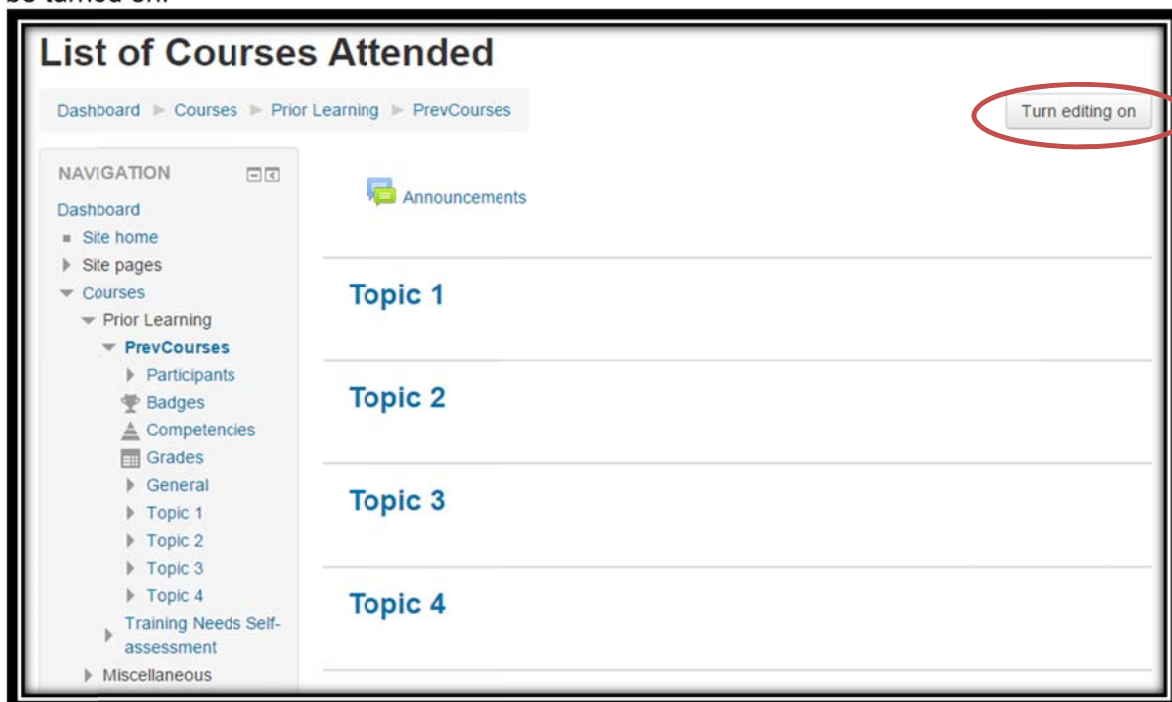


Click 'Save and return' to continue.

The course is now listed under the selected category. To add content to the course, click the name of the course.

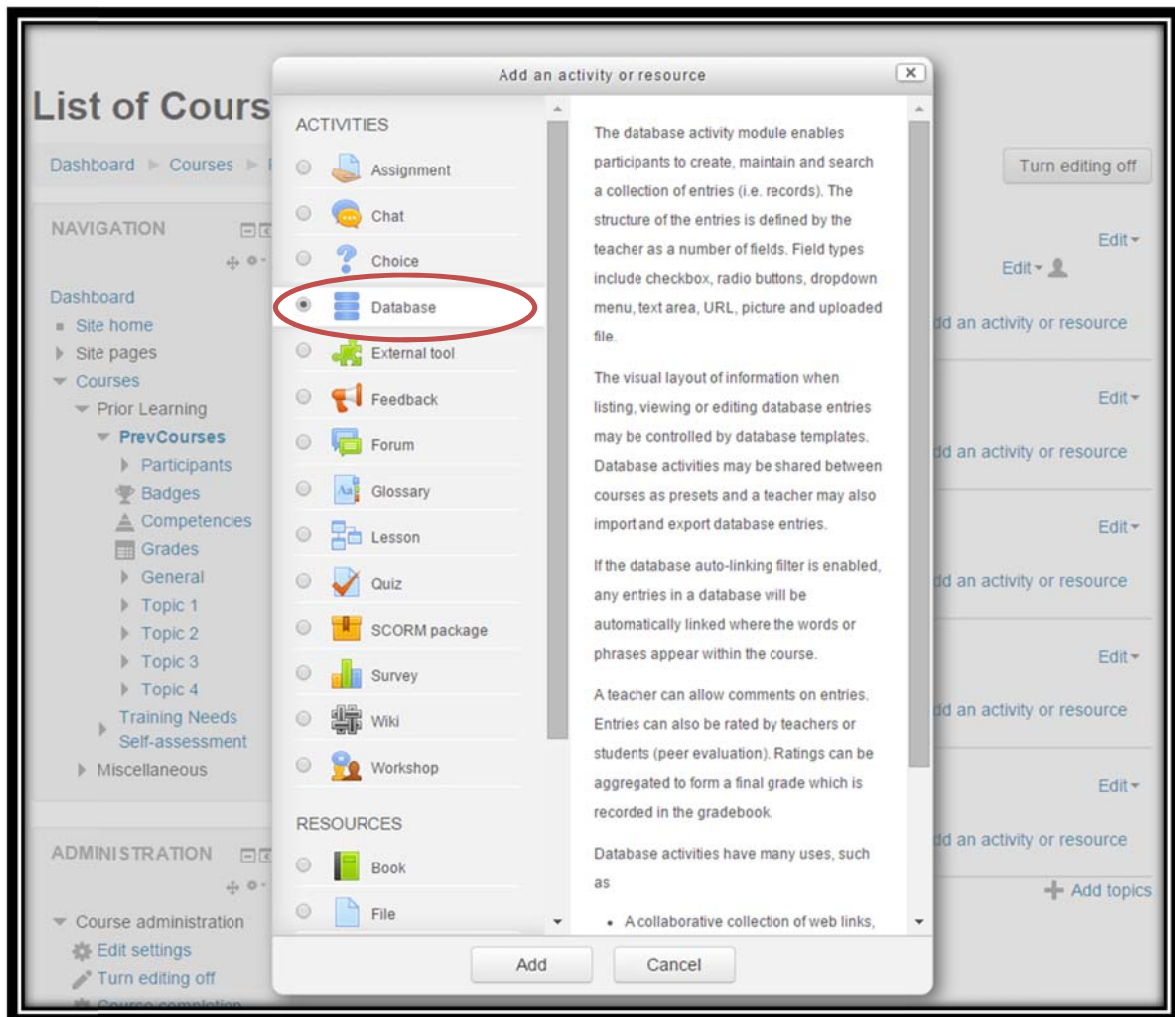


When a course is first created, the content will be empty. To add content, firstly editing must be turned on.

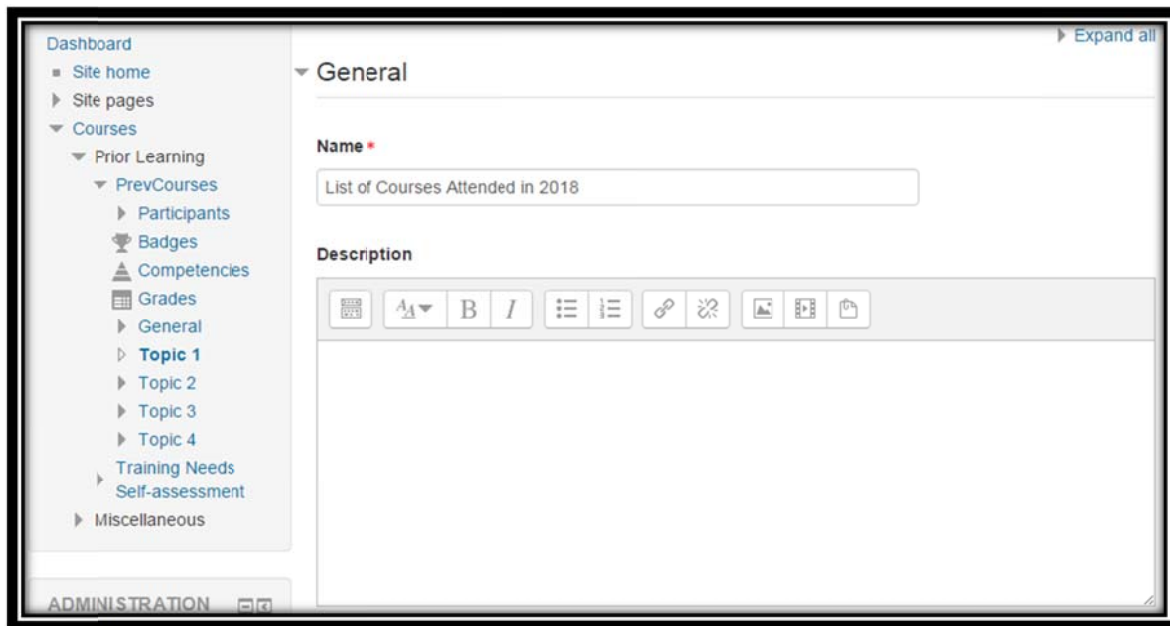


After editing is turned on, an activity or resource can be added in each topic. Click 'Add an activity or resource' to proceed.

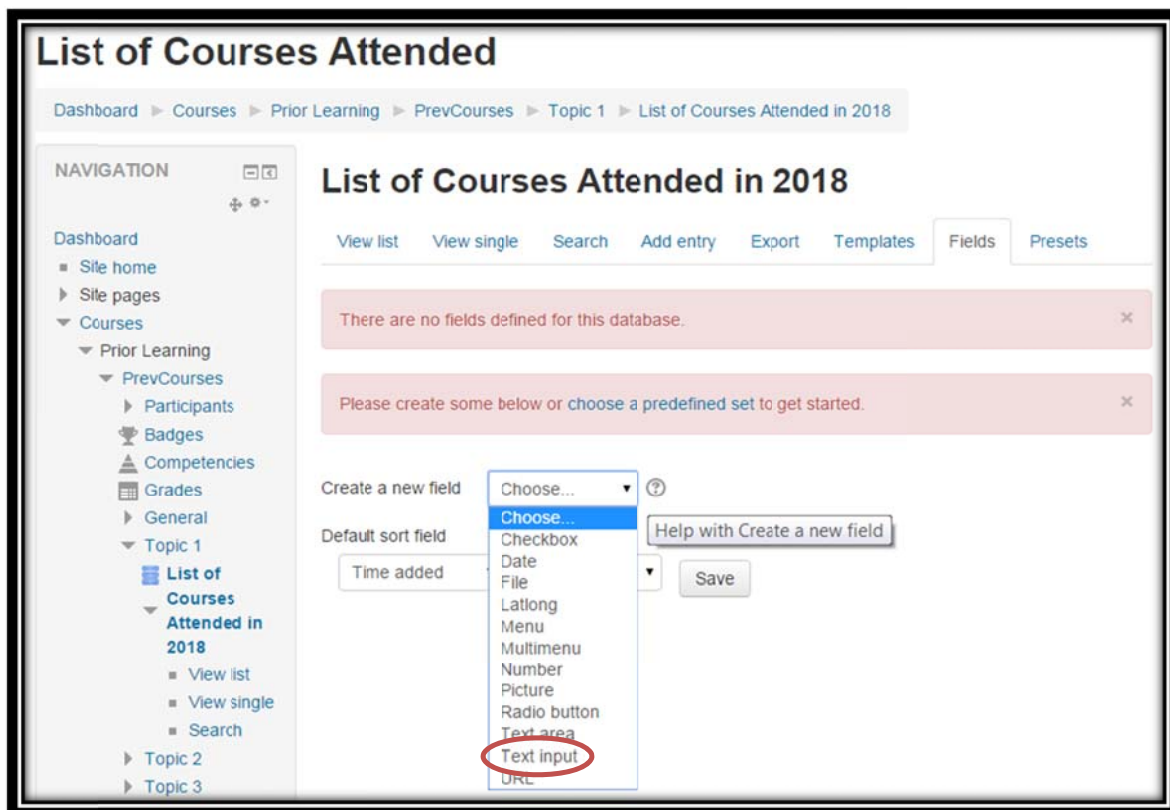




As usual, put a title for the activity, and any other appropriate settings for the database. Click 'Save and display' to proceed.



For a database type of activity, the admin / manager must define the fields that a user needs to fill out. Therefore by default currently there are no fields defined. Assuming the first item in the database would be the course name, choose 'Text input' from the dropdown menu.



Put the item name, and indicate it as a required field. Click 'Add' to save and continue.

## List of Courses Attended in 2018

View list View single Search Add entry Export Templates Fields Presets

### Text field

Field name

Field description

Required field

Allow autolink

Add Cancel

If the field that needs to be keyed in by examiners is related to dates, choose 'Date' as the new field, and proceed as above. Similarly, a field relating to 'File' can also be added via similar method (for example, the user needs to upload the program of the training). A basic database would have fields like shown below.

## List of Courses Attended in 2018

View list View single Search Add entry Export Templates Fields Presets

Field name	Field type	Required	Field description	Action
Course Name	Text field	Yes		
Place	Text field	Yes		
Organizers	Text field	Yes		
Start Date	Date field	No		
End Date	Date field	No		
Programs	File field	No		

Create a new field

Default sort field

Save

Templates tab is the place where the display of records (either a single item or the whole list) can be customized. If the admin or manager would like the list to be presented in table format, it is recommended to key in this in each of the respective box (and disable editor first):

Header:

```
<table style="width: 100%;" border="1" cellpadding="5">
<tbody>
<tr>
<td><b>Course Name</b></td>
<td><b>Place</b></td>
<td><b>Organizers</b></td>
<td><b>Start Date</b></td>
<td><b>End Date</b></td>
<td><b>Program</b></td>
<td><b>Name</b></td>
</tr>
```

Repeated entry:

```
<tr>
<td>[[Course Name]] | ##edit## ##more## ##delete##</td>
<td>[[Place]]</td>
<td>[[Organizers]]</td>
<td>[[Start Date]]</td>
<td>[[End Date]]</td>
<td>[[Program]]</td>
<td>##user##</td>
</tr>
```

Footer:

```
</tbody>
</table>
```



## List of Courses Attended in 2018

View list View single Search Add entry Export **Templates** Fields Presets

**List template** Single template Advanced search template Add template RSS template  
 CSS template Javascript template

Defines browsing interface for multiple entries

Header

```
<table style="width: 100%;" border="1" cellpadding="5">
<tbody>
<tr>
<td>Course Name</td>
<td>Place</td>
<td>Organizers</td>
<td>Start Date</td>
<td>End Date</td>
</tr>
```

Therefore, if there are entries added in the list, they would be shown in table format as follows. The list can also be exported via the 'Export' tab.

## List of Courses Attended in 2018

View list View single Search Add entry

Entries per page 10 Search  Sort by Time added Ascending Advanced search Save settings

Course Name	Place	Organizers	Start Date	End Date	Program	Name
Substantive Examination Course   🔍	Geneva	WIPO	2 January 2018	4 January 2018		Admin User
Regional Patent Examination Training Program   🔍	Australia	IP Australia	1 February 2018	7 February 2018		Admin User
Train the Trainers   ⚙️ 🔍 ✕	Ha Noi	EPO	1 February 2018	5 February 2018	<a href="#">W</a> Program for Train the trainers - 2018.docx	Examiner AAA

From an enrolled user's perspective, he/she can add and view entries, as shown below.

## List of Courses Attended in 2018

[View list](#)
[View single](#)
[Search](#)
[Add entry](#)

### New entry

Course Name: \*

Place: \*


Organizers: \*

Start Date: 1 February 2018

End Date: 5 February 2018

Maximum size for new files: 8MB, maximum attachments: 1

Files



Program for Train the

### Creating Similar Courses for Previous Years

Similar steps could be taken to create list of courses attended by examiners for other years. A shorter way to do this is by saving the table created in the first course as a preset, and repeat using it for other similar courses. To save the format as a preset, click the 'Presets' tab.

Under the Save as preset, give a name for the preset, then click 'Continue'.

## List of Courses Attended in 2018

View list View single Search Add entry Export Templates Fields Presets

### Export

▼ Export as zip

Export

▼ Save as preset

**Name \***

List of Courses Attended

**Overwrite**  Overwrite the preset if it already exists

Continue

There are required fields in this form marked \* .

A notification will show that the preset has been saved.

Dashboard ► Courses ► Prior Learning ► PrevCourses ► Courses Attended in 2018 ► List of Courses Attended in 2018 ► Presets

## List of Courses Attended in 2018

View list View single Search Add entry Export Templates Fields Presets

Saved successfully. Your preset will now be available across the site. ×

Continue

**NAVIGATION**

- Dashboard
- Site home
- Site pages
- Courses
  - Prior Learning
    - PrevCourses
    - Participants

To use the preset, add a database activity under to topic 'Courses Attended in 2017', similar to what have been done for the previous activity.

The screenshot shows a vertical list of course categories. Each category has a title, an 'Edit' button, and an 'Add an activity or resource' button. The categories are:

- Announcements
- Courses Attended in 2018
- List of Courses Attended in 2018
- Courses Attended in 2017
- Courses Attended in 2016
- Courses Attended in 2015 and below

The 'Add an activity or resource' button for 'Courses Attended in 2017' is circled in red.

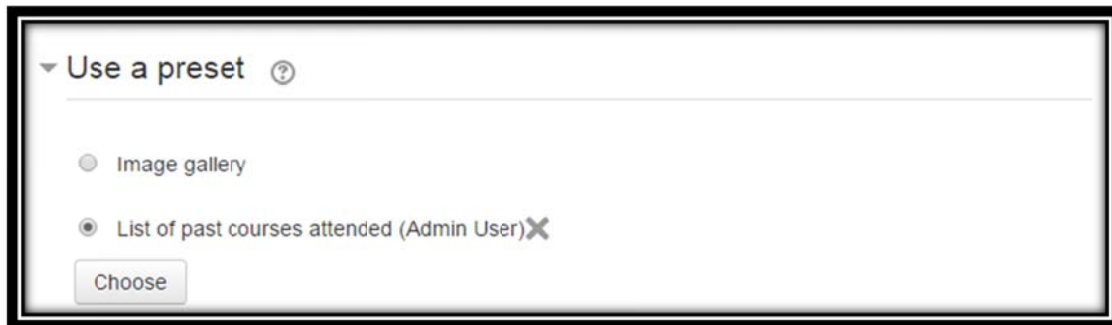
Again, similar warning appears where no fields are defined in the database. However, instead of creating all fields one by one, now click the 'Presets' tab.

The screenshot shows the 'List of Courses Attended in 2017' page. The breadcrumb trail is: Dashboard > Courses > Prior Learning > PrevCourses > Courses Attended in 2017 > List of Courses Attended in 2017 > Fields. The 'Fields' tab is active, showing two error messages:

- There are no fields defined for this database.
- Please create some below or choose a predefined set to get started.

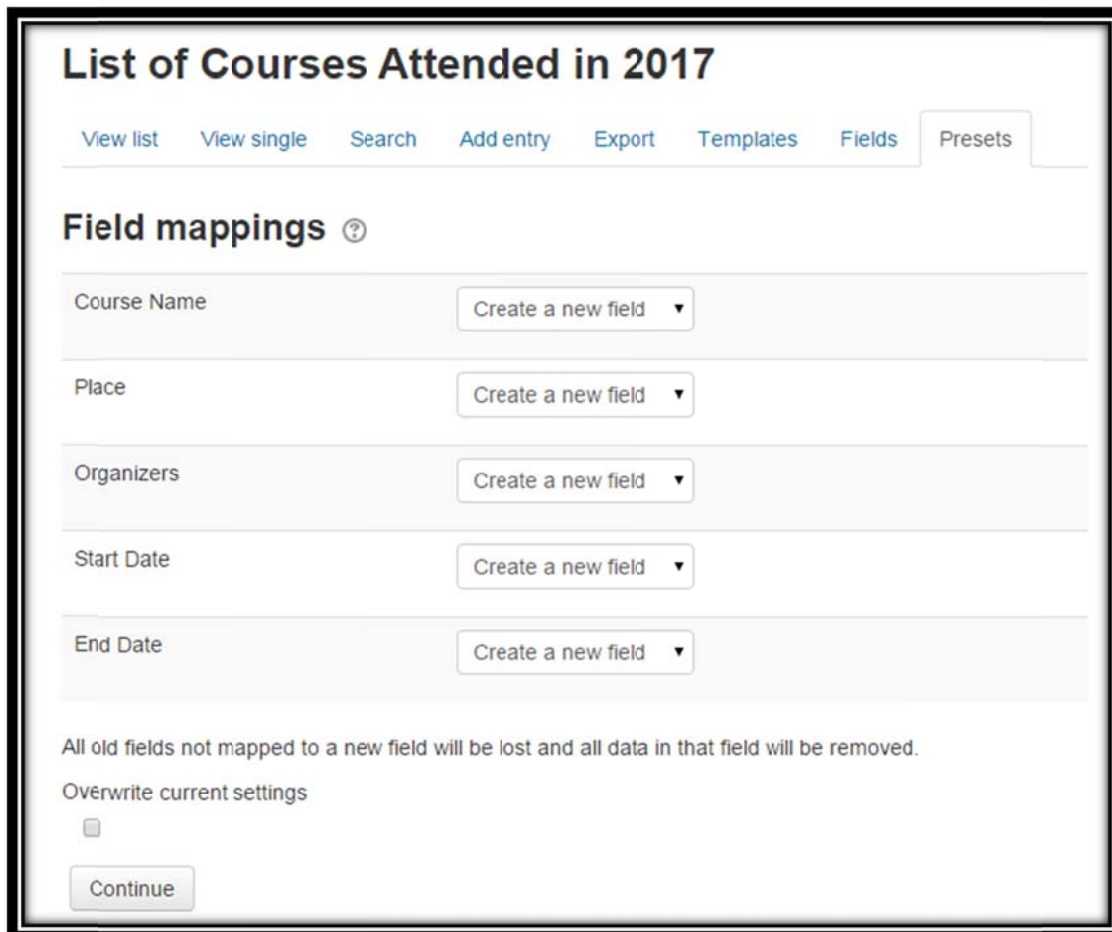
Below the messages, there are options to 'Create a new field' (with a 'Choose...' dropdown) and 'Default sort field' (with 'Time added' and 'Ascending' dropdowns, and a 'Save' button).

Scroll down until the header 'Use a preset'. The preset that has been saved earlier is now available under the preset. Choose the preset to proceed.



The screenshot shows a dropdown menu titled "Use a preset" with a help icon. Two radio buttons are visible: "Image gallery" (unselected) and "List of past courses attended (Admin User)" (selected). A "Choose" button is located at the bottom of the menu.

The preset fields are now available. If there are no changes in the preset fields, click 'Continue'.



The screenshot displays the "List of Courses Attended in 2017" interface. At the top, there are navigation tabs: "View list", "View single", "Search", "Add entry", "Export", "Templates", "Fields", and "Presets". Below the tabs is a "Field mappings" section with a help icon. It contains five rows, each with a field name and a "Create a new field" dropdown menu:

- Course Name
- Place
- Organizers
- Start Date
- End Date

Below the mappings, a warning message states: "All old fields not mapped to a new field will be lost and all data in that field will be removed." There is an "Overwrite current settings" checkbox (unchecked) and a "Continue" button at the bottom.

Now any enrolled user can key in the required data to be compiled.

## List of Courses Attended in 2017

[View list](#) [View single](#) [Search](#) [Add entry](#) [Export](#) [Templates](#) [Fields](#) [Presets](#)

### New entry

Course Name: \*

Place: \*

Organizers: \*

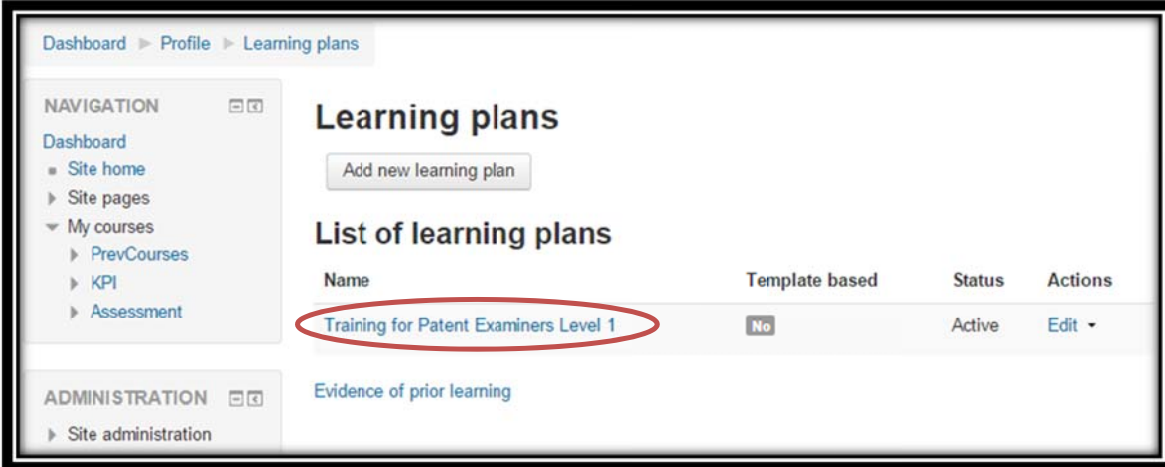
Start Date:

End Date:

## MATCH COMPETENCIES OF A USER AND A COURSE

Generally, each user will have his / her own learning plan, in which the user has to be proficient in all competencies in the learning plan in order to mark the learning plan as complete. Therefore it would be a good idea to facilitate a situation where a user wants to find out a course that will help the user achieves that completion. The system could recommend a course based on the competencies that the user is not yet proficient.

Currently, Moodle allows a user to find a course that is relevant to one competency. This can be done by going to *Profile>Learning plans*. Click the learning plan.



The screenshot shows the Moodle 'Learning plans' page. The breadcrumb trail is 'Dashboard > Profile > Learning plans'. On the left, there are navigation and administration menus. The main content area is titled 'Learning plans' and includes an 'Add new learning plan' button. Below this is a 'List of learning plans' table with the following data:

Name	Template based	Status	Actions
Training for Patent Examiners Level 1	No	Active	Edit ▾

Below the table, there is a link for 'Evidence of prior learning'.

The list of competencies under the learning plan will be displayed. Click 'Edit' at the right of the competency, then click 'Find courses' to find courses that are relevant to the competency.

**NAVIGATION**

- Dashboard
  - Site home
  - Site pages
  - My courses
    - PrevCourses
    - KPI
    - Assessment

**ADMINISTRATION**

- Site administration

**Training for Patent Examiners Level 1**

+ Add competency

For newly-recruited patent examiners

**Status**  
Active (Complete this learning plan) (Send back to draft)

**Progress**  
2 out of 16 competencies are proficient **12.5%**

Comments (0)

**Learning plan competencies**

Name	Rating	Proficient	Status	Actions
+ Nature and function of IP rights 1.1 Path: Training for Patent Examiners / 1	Competent	Yes	-	Edit Request review Delete Find courses
+ Function of international and national IP offices 1.2 Path: Training for Patent Examiners / 1	-	No	-	Edit
+ Laws, treaties and conventions governing international and national patent systems 1.3 Path: Training for Patent Examiners / 1	Competent	Yes	-	Edit
+ Function and processes of patent examination and the role of patent examiners 1.4 Path: Training for Patent Examiners / 1	-	No	-	Edit

A pop-up will show the list of courses that are relevant or linked to the competency.

Assess Novelty 4  
Path: Training for Patent Examiners /

Assess Inventive Step 5  
Path: Training for Patent Examiners /

Assess Inventive Step 6  
Path: Training for Patent Examiners /

Assess Inventive Step 7  
Path: Training for Patent Examiners /

**Linked courses**

Courses linked to this competency

- WIPO Self-assessment of Individual Examiner Training Needs Training Needs Self-assessment

Path: Training for Patent Examiners /

Currently it is only possible that users can find courses that are linked to one competency. However it is possible to cross link one competency with another competency, so indirectly the user can find a course that is linked to the competencies that he / she is not yet proficient.



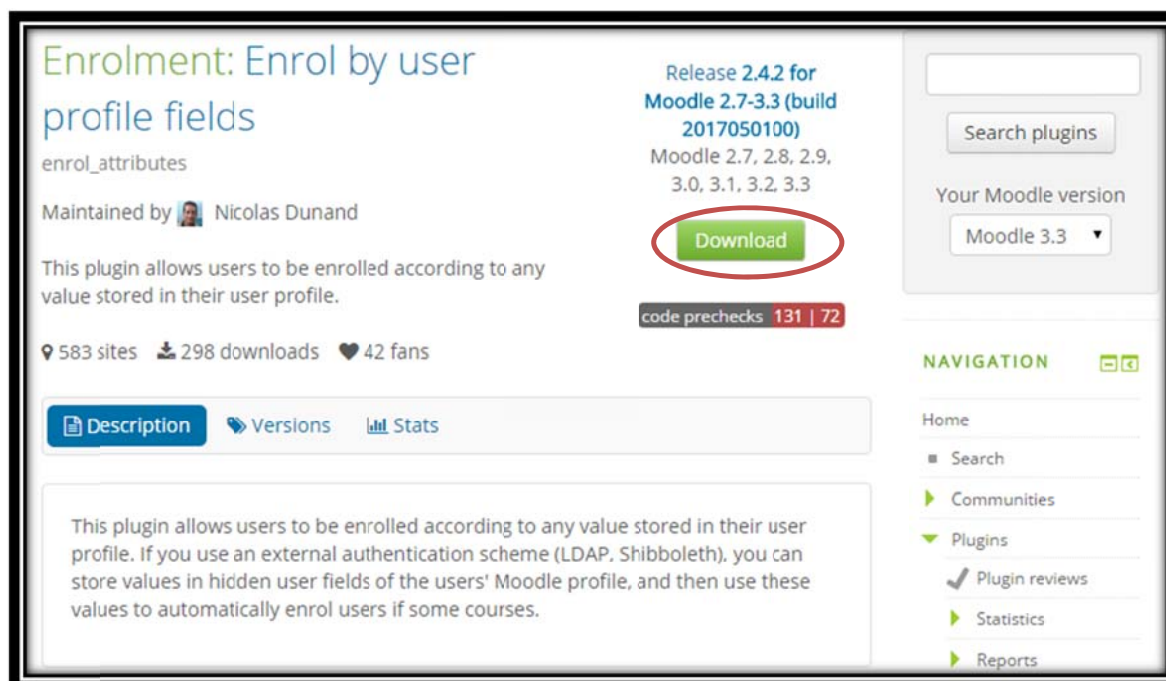
## USING PLUGINS

One of the advantages of using Moodle is the freedom to add plugins to complement the existing features found in Moodle. Directory of plugins that can be used can be found here: <https://moodle.org/plugins/>. There are several functions that may be worth having in the LMS for patent examiner training that can be achieved by installing plugins, as will be shown below.

### Match Course with user profile fields

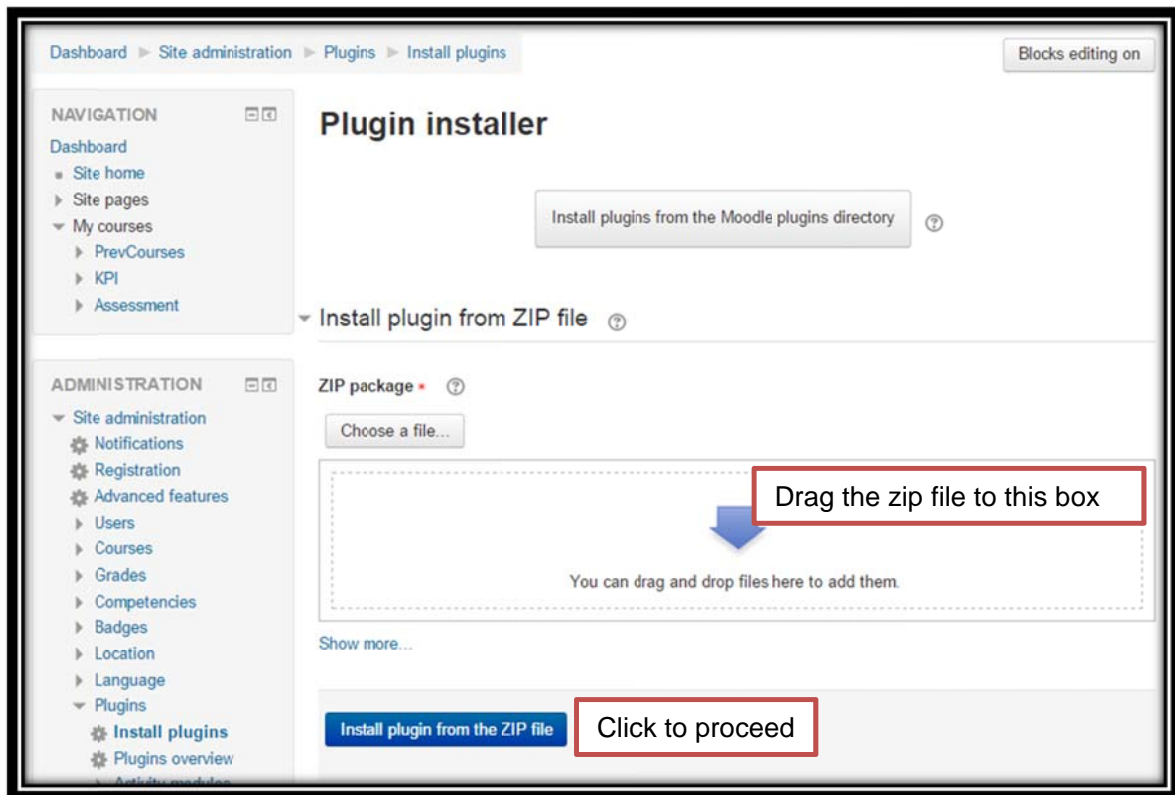
As shown earlier, custom profile fields can be made in Moodle. In the previous examples, a user can input a certain criteria in his / her profile field, e.g. IPC related to the technology field, recruitment date as a patent examiner, technical background etc. It would be an advantage if the user can filter courses according to these fields, e.g. a course that only users with a background in Biotechnology can enroll.

While by default this cannot be done in Moodle, this plugin allows the workaround of such feature: [https://moodle.org/plugins/enrol\\_attributes](https://moodle.org/plugins/enrol_attributes). Click the 'Download' button to download (remember to check that the plugin is compatible with the Moodle version installed).



The screenshot shows the Moodle plugin directory page for the 'Enrolment: Enrol by user profile fields' plugin. The page title is 'Enrolment: Enrol by user profile fields' and the plugin ID is 'enrol\_attributes'. It is maintained by Nicolas Dunand. The description states: 'This plugin allows users to be enrolled according to any value stored in their user profile.' The page shows 583 sites, 298 downloads, and 42 fans. The release information is 'Release 2.4.2 for Moodle 2.7-3.3 (build 2017050100)' and it is compatible with Moodle versions 2.7, 2.8, 2.9, 3.0, 3.1, 3.2, and 3.3. A green 'Download' button is circled in red. The page also shows a 'code prechecks' section with 131 passes and 72 failures. On the right, there is a search bar, a 'Search plugins' button, and a dropdown menu for 'Your Moodle version' set to 'Moodle 3.3'. A navigation menu on the right includes Home, Search, Communities, Plugins, Plugin reviews, Statistics, and Reports.

To install the plugin, go to *Site administration > Plugins > Install plugins*. Then drag the downloaded zip file of the plugin to the box under 'Install plugin from ZIP file'. Alternatively, the plugin can be installed directly from the Moodle plugins directory. Then click 'Install plugin from the ZIP file' to proceed.



Follow the instruction to install the plugin.



## Plugins check

This page displays plugins that may require your attention during the upgrade, such as new plugins to be installed, plugins to be upgraded, missing plugins etc. Additional plugins are displayed if there is an available update for them. It is recommended that you check whether there are more recent versions of plugins available and update their source code before continuing with this Moodle upgrade.

### Plugins requiring attention

**Plugins requiring attention** 1 **All plugins** 420

Plugin name / Directory	Current version	New version	Requires	Source / Status
<b>Enrolment methods</b>				
Enrol by user profile fields <small>/enrol/attributes</small>		2017050100	• Moodle 2014051200	<span>Additional</span> <span>To be installed</span> <input type="button" value="Cancel this installation"/>

## Upgrading to new version

### enrol\_attributes

Success

In the next page, choose profile fields that may be used to enroll people. To make all fields available as criteria for enrolment, choose all by clicking 'Ctrl' while selecting the field. Then click 'Save changes' to proceed.

The settings shown below were added during your last Moodle upgrade. Make any changes necessary to the defaults and then click the "Save changes" button at the bottom of this page.

### New settings - Enrol by user profile fields

Default role  Default: Student  
enrol\_attributes | default\_roleid

Default role used to enrol people with this plugin (each instance can override this).

Profile fields to be used in the selector      
enrol\_attributes | profilefields

Default: None  
Which user profile fields can be used when configuring an enrolment instance?

If you don't select any role here, this makes the plugin moot and hence disables its use in courses. The feature below may however still be used in this case.

Hold 'Ctrl' while selecting to select more than one field

To enable enrolment by user profile field, go to *Site administration > Plugins > Enrolments*. If the plugin was installed and configured successfully, the option 'Enrol by user profile' will be listed (although by default it is not yet enabled). To enable the method, click the slashed eye icon.

Dashboard > Site administration > Plugins > Enrolments

Blocks editing on

NAVIGATION

- Dashboard
- Site home
- Site pages
- My courses
  - PreVCourses
  - KPI
  - Assessment

ADMINISTRATION

- Site administration
  - Notifications
  - Registration
  - Advanced features
    - Users
    - Courses
    - Grades
    - Competencies
    - Badges
    - Location

### Category: Administration / Plugins / Enrolments

#### Manage enrol plugins

#### Available course enrolment plugins

Name	Instances / enrolments	Version	Enable	Up/Down	Settings	Test settings	Uninstall
Badge Enrolment	1 / 0	2015120300		↓			Uninstall
Manual enrolments	6 / 11	2017051500		↑ ↓	Settings		
Guest access	6 / 0	2017051500		↑ ↓	Settings		Uninstall
Self enrolment	6 / 0	2017051500		↑ ↓	Settings		
Cohort sync	0 / 0	2017051500		↑			
Enrol by user profile fields	0 / 0	2017050100					

This enrolment method is not yet available. Click here to make this method available

Once it is enabled, the item will not be greyed out. To prioritize this enrolment method, move the method by clicking the upward arrow.

Dashboard > Site administration > Plugins > Enrolments > Manage enrol plugins

Blocks editing on

NAVIGATION

- Dashboard
- Site home
- Site pages
- My courses
  - PreVCourses
  - KPI
  - Assessment

ADMINISTRATION

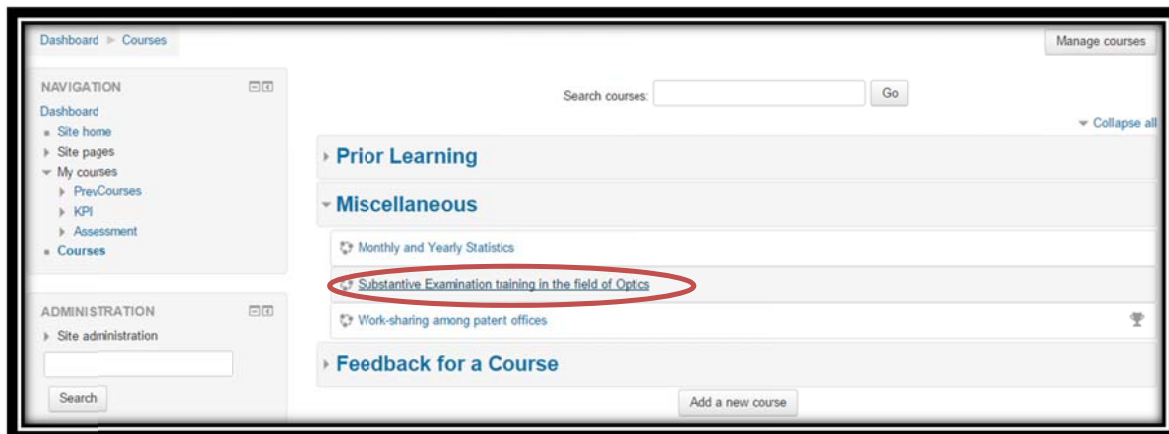
- Site administration
  - Notifications
  - Registration
  - Advanced features
    - Users
    - Courses
    - Grades

### Manage enrol plugins

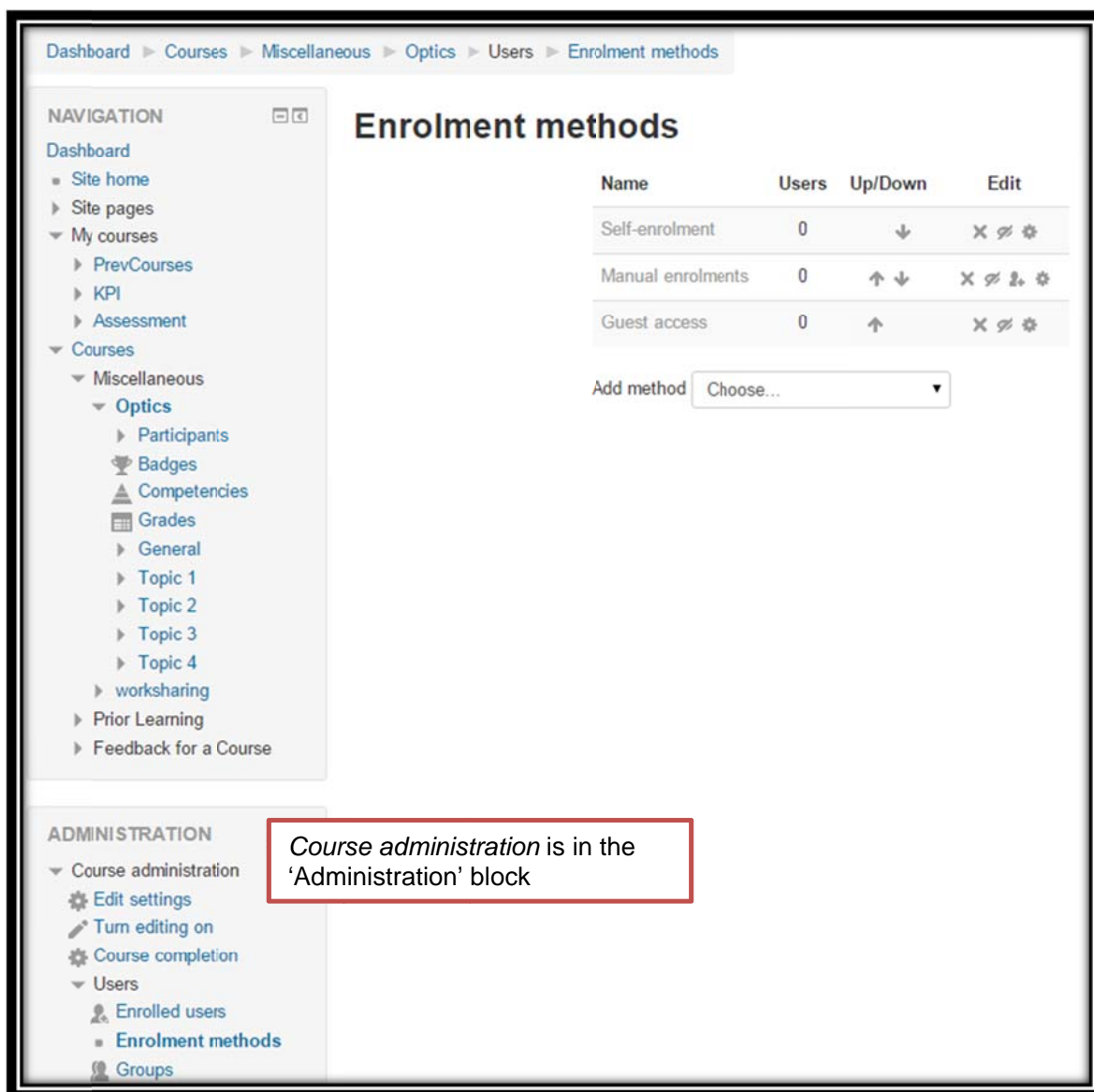
#### Available course enrolment plugins

Name	Instances / enrolments	Version	Enable	Up/Down	Settings	Test settings	Uninstall
Badge Enrolment	1 / 0	2015120300		↓			Uninstall
Manual enrolments	6 / 11	2017051500		↑ ↓	Settings		
Guest access	6 / 0	2017051500		↑ ↓	Settings		Uninstall
Enrol by user profile fields	0 / 0	2017050100		↑ ↓	Settings		Uninstall
Self enrolment	6 / 0	2017051500		↑ ↓	Settings		Uninstall
Cohort sync	0 / 0	2017051500		↑	Settings		Uninstall

To enable this enrolment method for a course, choose the course. In this example, the course selected is only to be made available for examiners who examine applications related to IPC Main Group H.



Under the 'Course administration', go to *Users > Enrolment methods*.



To add the enrolment method, click the downward arrow and choose 'Enrol by user profile fields'.

The screenshot displays the Moodle 'Enrolment methods' interface. The breadcrumb trail at the top reads: Dashboard > Courses > Miscellaneous > Optics > Users > Enrolment methods. The left-hand navigation menu includes: Dashboard, Site home, Site pages, My courses (with sub-items PreVCourses, KPI, Assessment), Courses, Miscellaneous (with sub-item Optics), and Optics (with sub-items Participants, Badges, Competencies, Grades, General, Topic 1, Topic 2, Topic 3, Topic 4, worksharing, Prior Learning, and Feedback for a Course). The main content area is titled 'Enrolment methods' and contains a table with the following data:

Name	Users	Up/Down	Edit
Self-enrolment	0	↓	✕ ✎ ⚙
Manual enrolments	0	↑ ↓	✕ ✎ ⚙
Guest access	0	↑	✕ ✎ ⚙

Below the table, there is an 'Add method' button with a dropdown menu. The dropdown menu is open, showing the following options: 'Enrol by user profile fields' (highlighted in blue), 'Choose...', 'Badge Enrolment', 'Self enrolment', and 'Cohort sync'.

Give a name for the new course prerequisite, and make the right condition. In this example, the IPC of the user must be exactly 'H02J'. Additional condition can also be enforced by clicking the plus icon.

Click 'Add method' to proceed.

## Enrol by user profile fields

▼ Enrol by user profile fields

Custom instance name

Role  
 Student ▼

User profile fields rules ⓘ

Relevant IPC classes ▼ = H02J

OR ▼

Technical Qualification ▼ = Engineering

Unenrol after attributes expiration ⓘ

This enrolment method is now available for this course. If there are multiple enrolment methods available, those methods can be arranged according to priority by moving the method up or down.

To enroll users via this method, click the pencil icon of the method to continue.

## Enrolment methods

Name				
Self-enrolment	0	↓	✕	🔍
Manual enrolments	0	↑ ↓	✕	🔍
Guest access	0	↑ ↓	✕	🔍
IPC	0	↑	✕	🔍

Add method

Click 'Force enrolments now' so any user that fulfils the criteria will be automatically enrolled in the course.

**Enrol by user profile fields**

▼ Enrol by user profile fields

Custom instance name

Role  
Student ▼

User profile fields rules ?

Relevant IPC classes ▼ = H02J

OR ▼

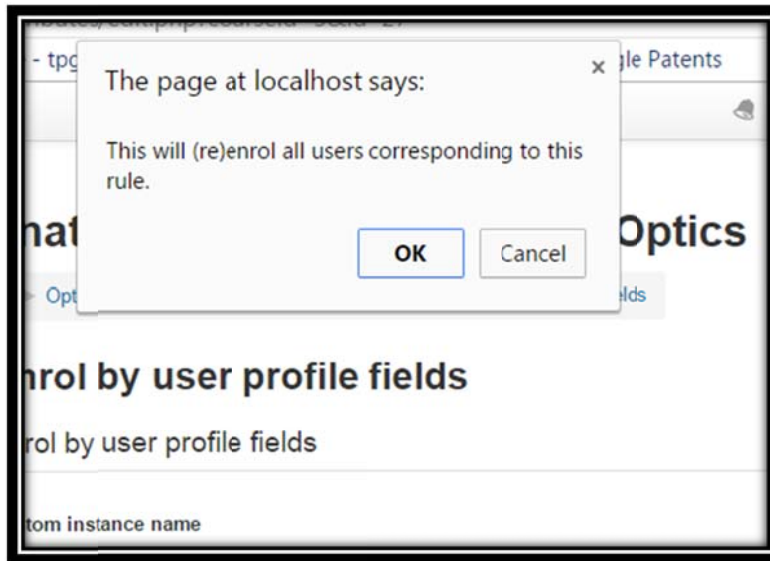
Technical Qualification ▼ = Engineering

Unenrol after attributes expiration ?

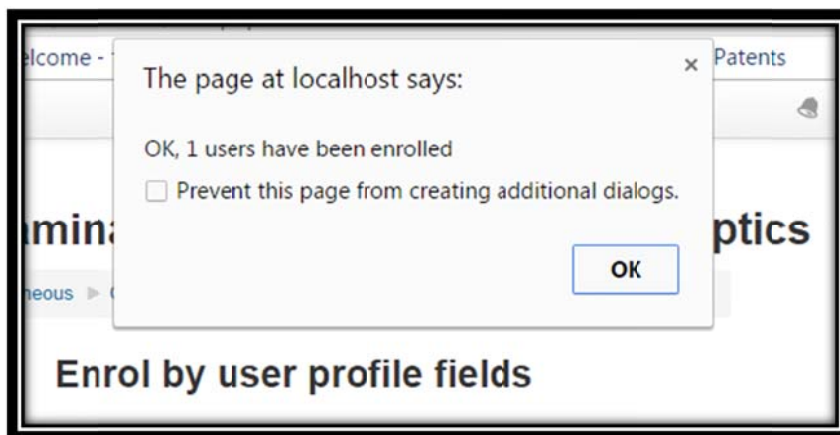
[Save changes](#) [Cancel](#) [Purge enrolments](#) [Force enrolments now](#)

A pop-up will appear confirming the choice, click OK to proceed.

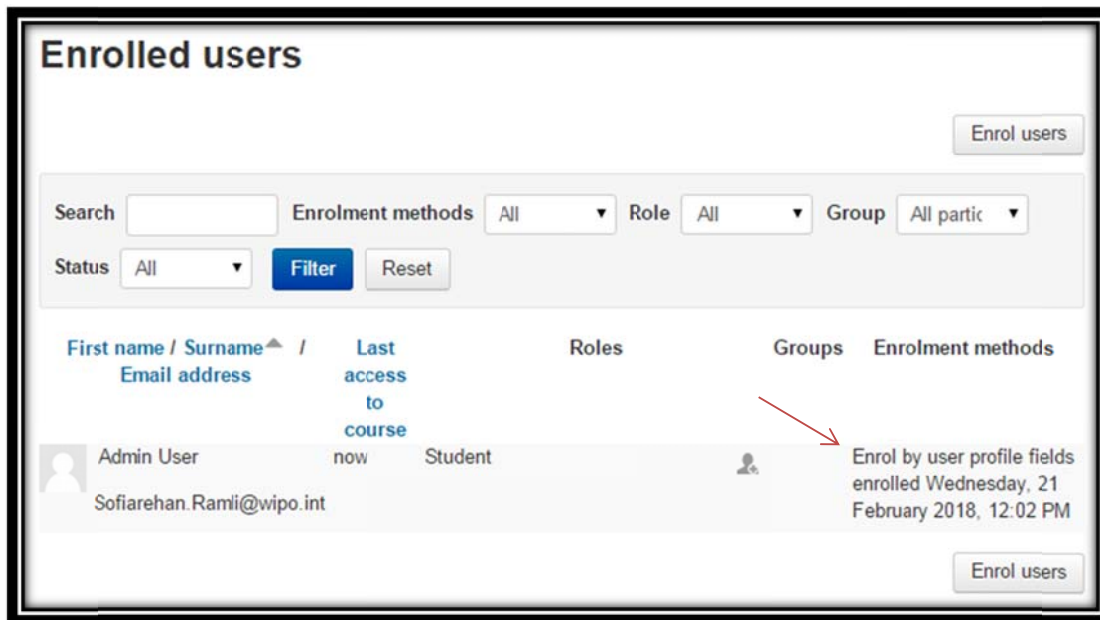




Another pop-up will appear, showing the number of users that will be enrolled by this method.



This is also reflected when viewing the list of enrolled users of the course, as shown here (*Course administration > Users > Enrolled users*).



However, as mentioned earlier, the enrolment criteria must ***exactly*** match the input of the user profile field. For example, it would not work to enroll users who examine applications in the main group H.

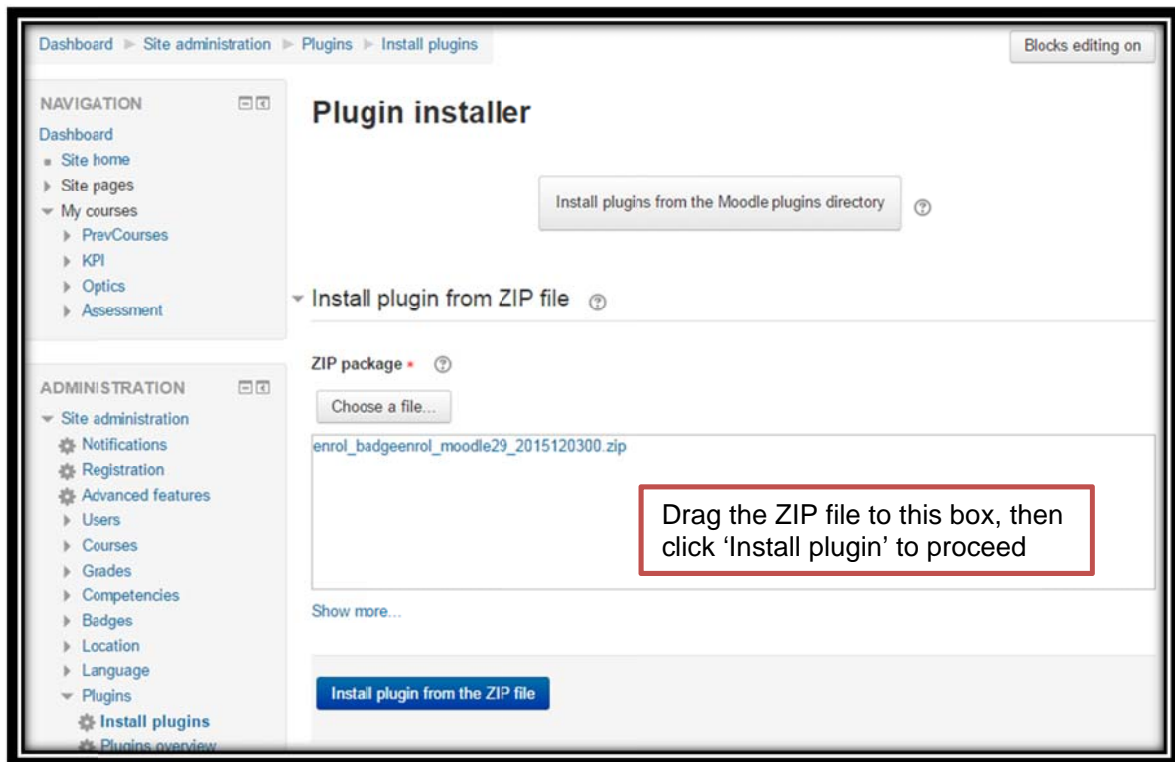
Additionally, so far there is no option of making this course optional to users who fulfilled the criteria; instead the user will be enrolled by force.

### Course Prerequisites

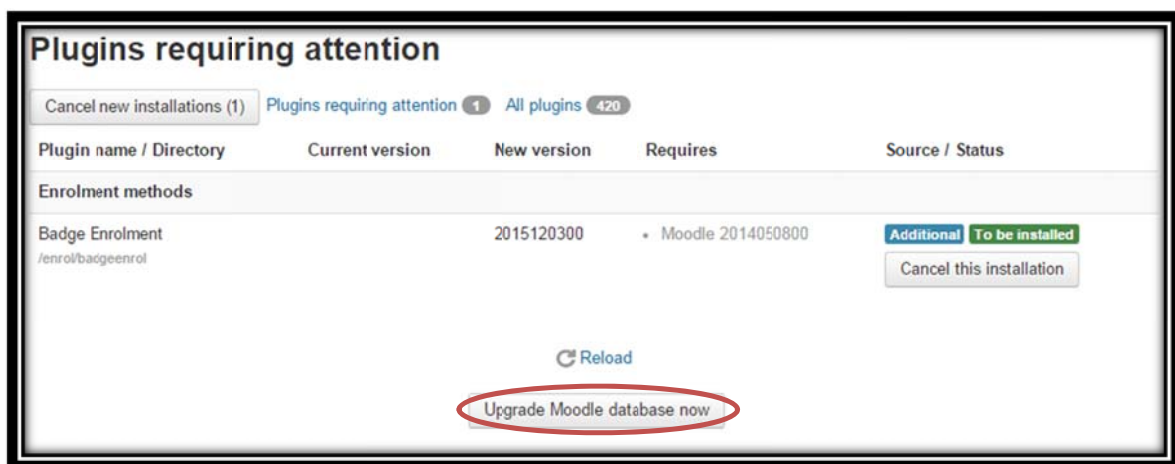
Another feature that would facilitate management of training of patent examiners in Moodle is the ability to set prerequisites relating to competencies to a course. This is to ensure that all participants in the course are on the same level of proficiency.

A helpful plugin to achieve this objective is called 'Badge Enrolment', and can be found here: [https://moodle.org/plugins/enrol\\_badgeenrol](https://moodle.org/plugins/enrol_badgeenrol). The idea behind this plugin is that each badge can be assigned to at least one competency, and a user has to have certain badges (i.e. proficient in certain competencies) in order to be qualified to enroll into a course. (Information about badges in Moodle can be found here: <https://docs.moodle.org/33/en/Badges>)

To install the plugin, go to *Site administration > Plugins > Install plugins*. Drag the downloaded zip file from the Moodle site to the box with the blue arrow.



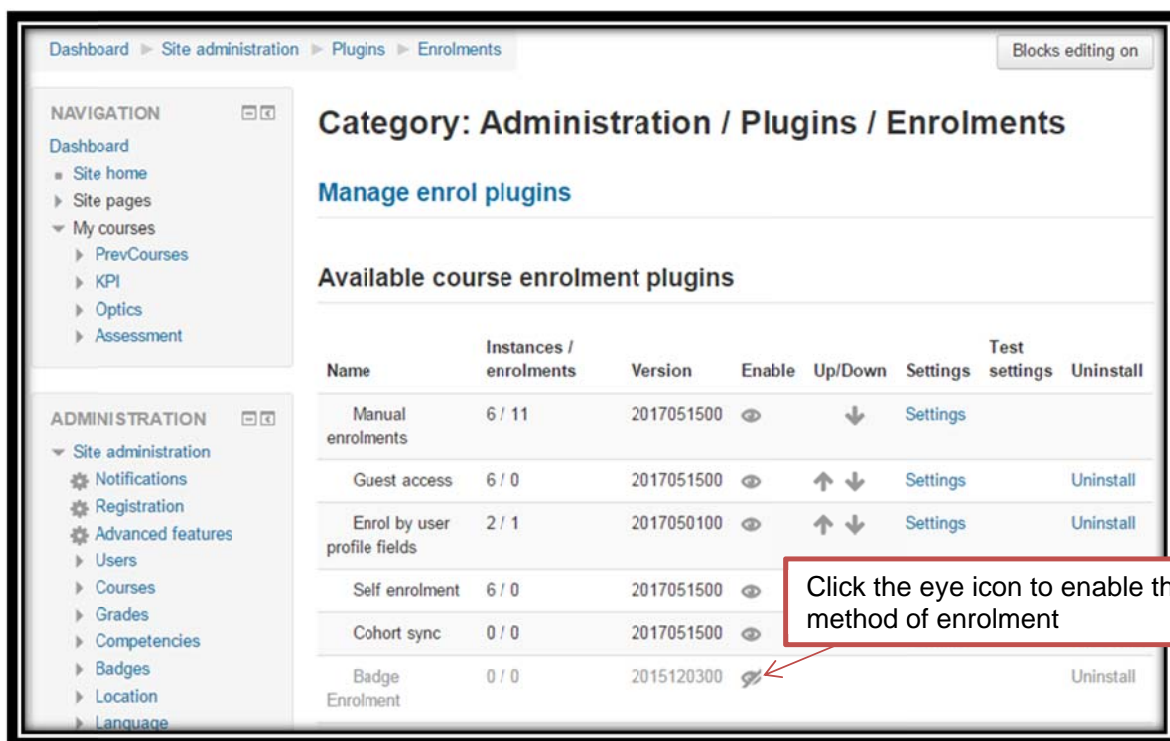
If everything is validated, proceed with installation by clicking 'Continue', then 'Upgrade Moodle database now'.



Lastly, click 'Continue' to finish installation.



After installation, go to *Site administration > Plugins > Enrolments*, and click the eye icon for the 'Badge enrolment' to enable this method.

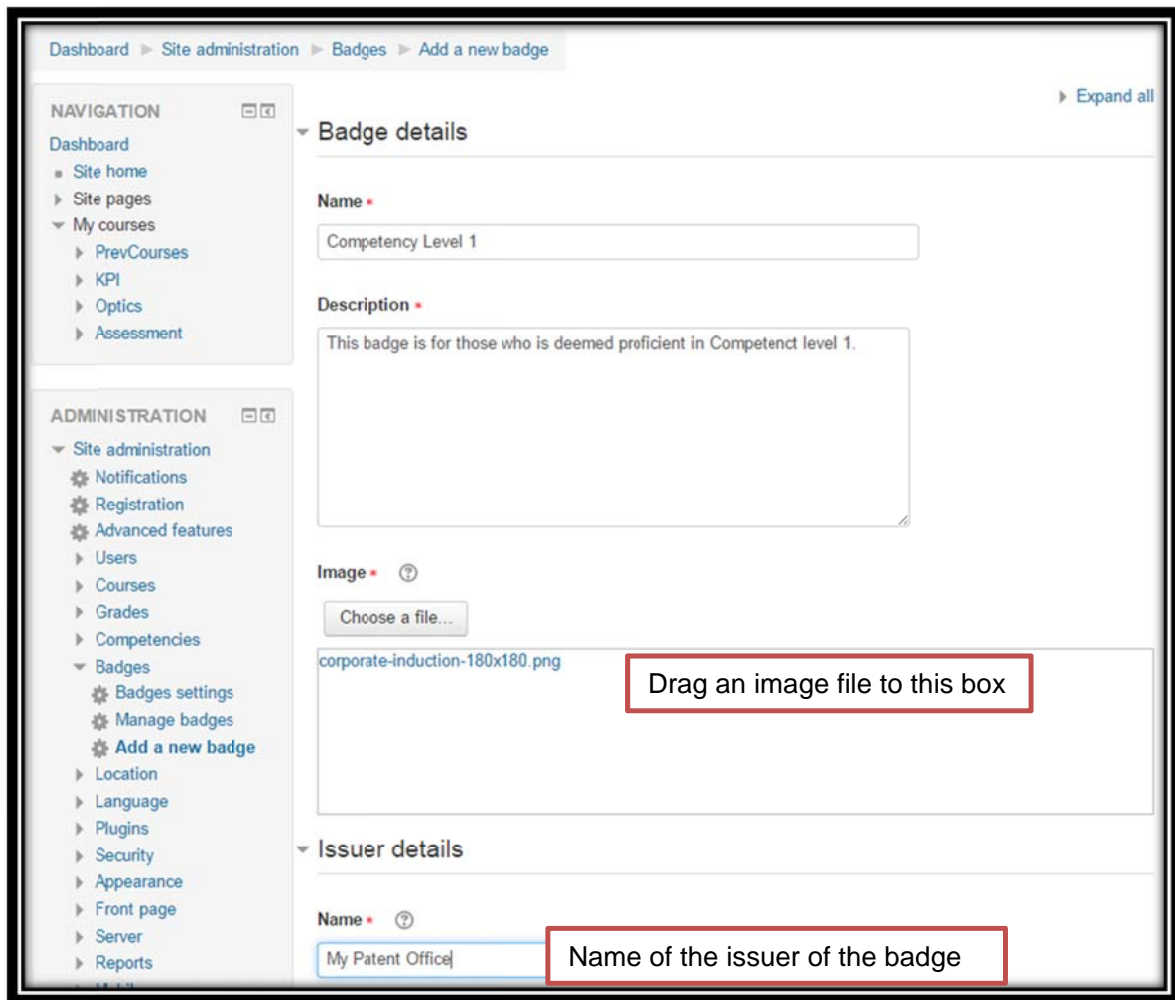


### Creating a Badge

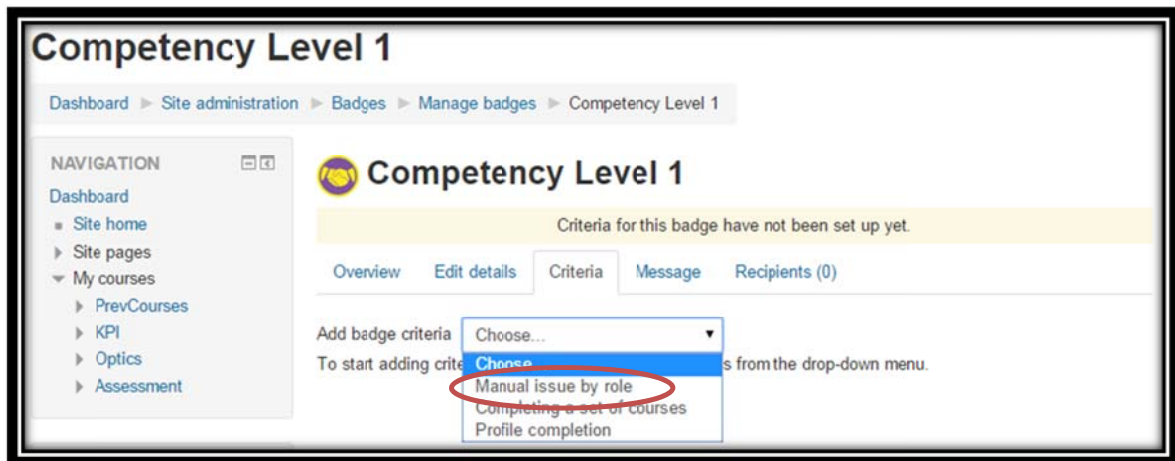
In order to enroll users who have certain badges, first badges must be created. Go to *Site administration > Badges > Add a new badge*. Fill out the compulsory details for the new badge. It is recommended that the description clearly stated that which competency that relates to the badge.

Do not forget to upload an image to be used as the badge.

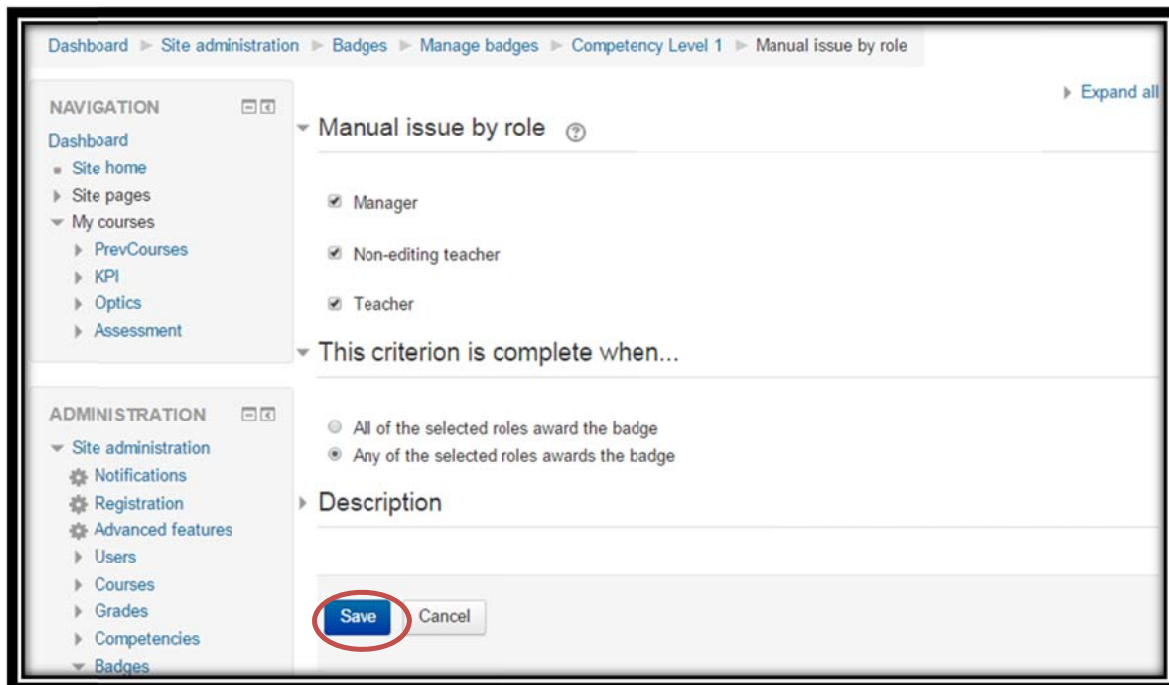
Click 'Create badge' at the end of the page to continue.



Next step is to set up the criteria for the badge. Since this badge is independent of courses taken previously, it must be manually issued. Click 'Manual issue by role' from the dropdown menu.

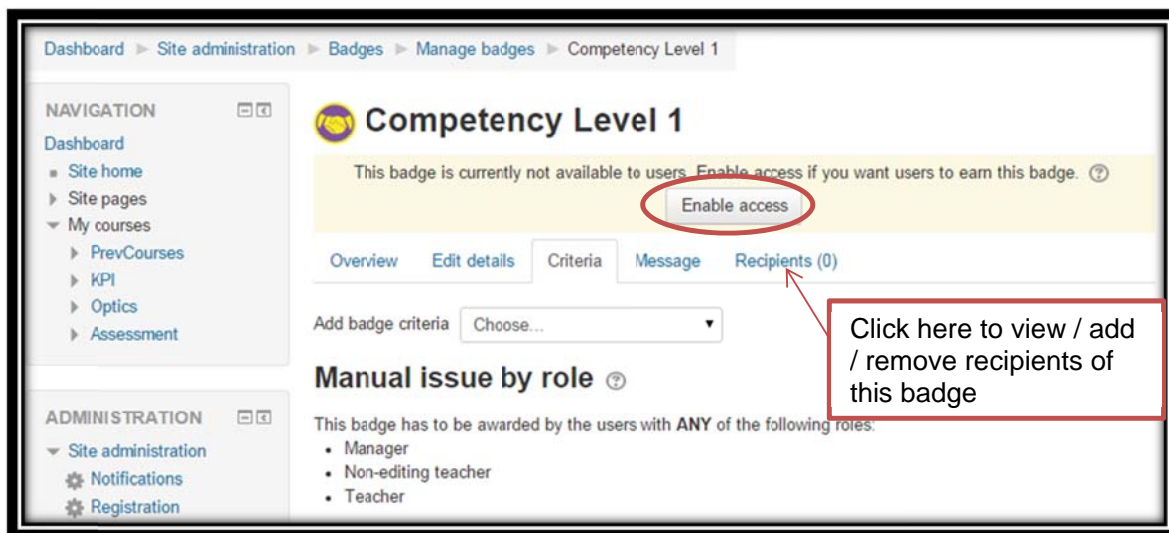


Choose the role that can issue the badge, and choose the option whether all of them must award the badge to the user or any of them will do. Click 'Save' to proceed.

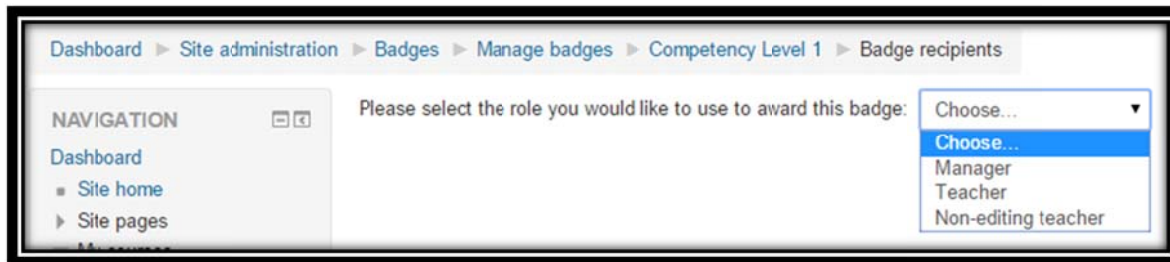
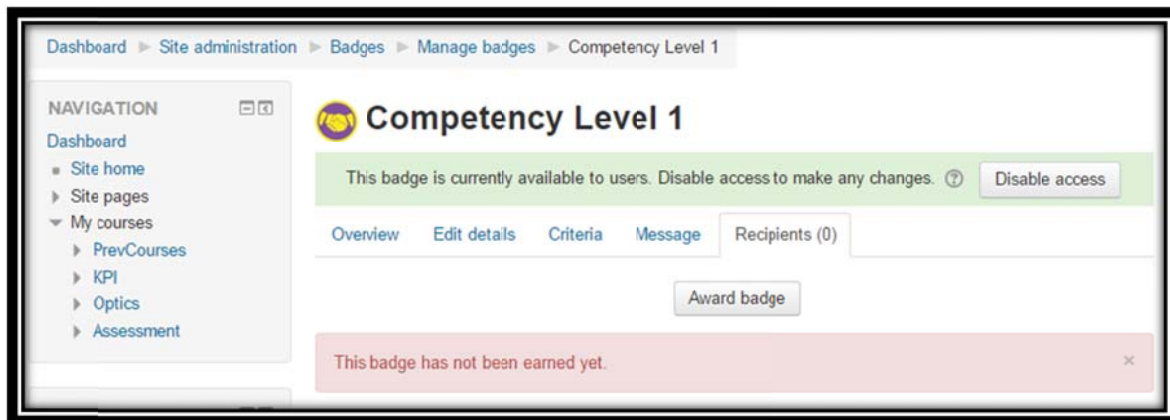


Click 'Enable access' to proceed.

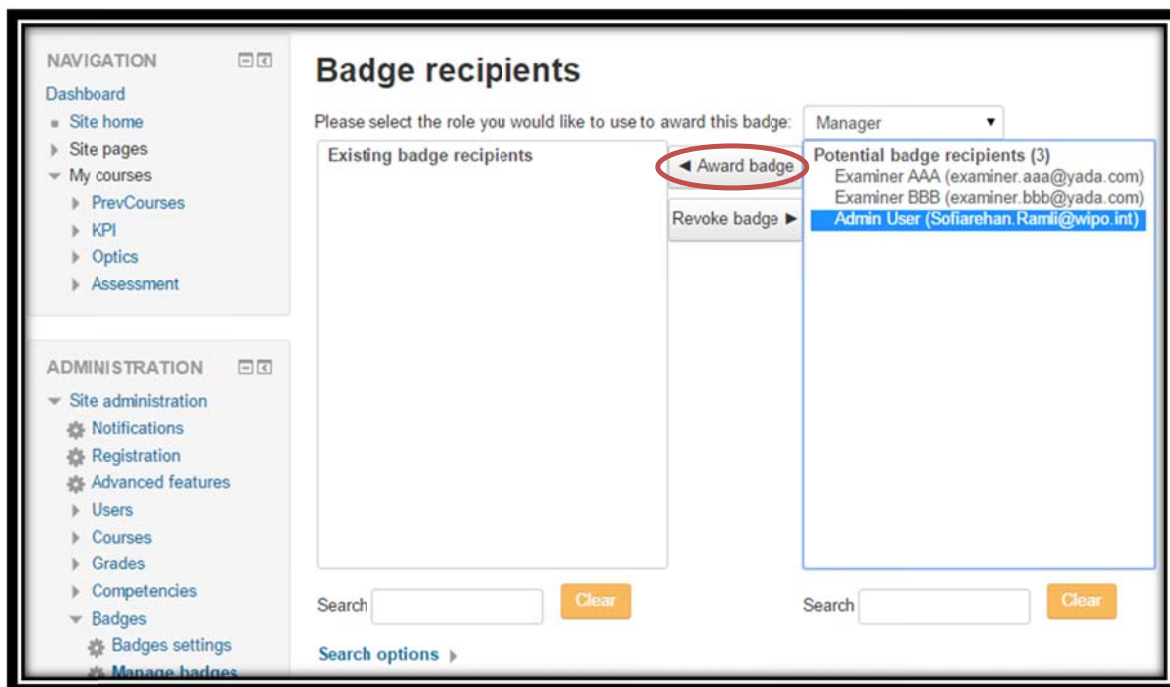
After access is enabled, badge issuers can select recipients to be awarded with this badge. To award the badge to a user, click the 'Recipients' tab.



Click 'Award badge'. On the next screen, if there is more than one role that can award the badge, choose the role from the dropdown menu.



Click the intended recipient, then click 'Award badge'. Similar steps are also applicable for revoking a badge from a user.



All awarded badges will be displayed on the profile page of the user, as shown below.

**Admin User**

Dashboard ▶ Profile

Reset page to default Customise this page

**NAVIGATION**

Dashboard

- Site home
- Site pages
- My courses
  - PrevCourses
  - KPI
  - Optics
  - Assessment

**ADMINISTRATION**

Site administration

Search

**User details** [Edit profile](#)

**Email address**  
Sofiarehan.Ramli@wipo.int

**Date of Birth**  
26 February 1982

**Start date as a Patent Examiner**  
16 January 2006

**Relevant IPC classes**  
H02J

**Technical Qualification**  
BSc. in Electrical Engineering (majoring in Power)

**Miscellaneous**


- Blog entries
- Notes
- Forum posts
- Forum discussions
- Learning plans

**Reports**

- Today's logs
- All logs
- Outline report
- Complete report
- Browser sessions
- Grades overview
- Grade

**Badges**

Badges from Individualized and Competency based Patent Examiner Training Management:



Competency Level 1

**Login activity**

**First access to site**  
Tuesday, 9 January 2018, 1:51 PM (43 days 20 hours)

**Last access to site**  
Thursday, 22 February 2018, 10:13 AM (13 secs)

**Last IP address**  
0:0:0:0:0:0:1

*Set badges as a course prerequisite*

Now the badge can be set as a prerequisite to an existing course. To go to the desired course, go to *Site administration > Courses > Manage courses and categories*. Choose the course and click 'View'.



### Substantive Examination training in the field of Optics

[View](#) | [Edit](#) | [Enrolled users](#) | [Delete](#) | [Hide](#) | [Backup](#) | [Restore](#)

Full name	Substantive Examination training in the field of Optics
Short name	Optics
ID number	
Category	Miscellaneous
Groupings	0
Groups	0
Role assignments	Student: 2
Enrolment methods	IPC Enrol by user profile fields Badge Enrolment

Under the Course administration, go to *Users > Enrolment methods*.

Click the gear icon next to 'Badge enrolment' to change the settings for this enrolment method.

Dashboard > Courses > Miscellaneous > Optics > Users > Enrolment methods

### Enrolment methods

Name	Users	Up/Down	Edit
Self-enrolment	0	↓	✕ ⚙
Manual enrolments	0	↑ ↓	✕ ⚙ 👤 ⚙
Guest access	0	↑ ↓	✕ ⚙
IPC			✕ ⚙ ✎
Badge Enrolment	0	↑ ↓	✕ ⚙ ✎
Enrol by user profile fields	0	↑	✕ ⚙ ✎

Add method

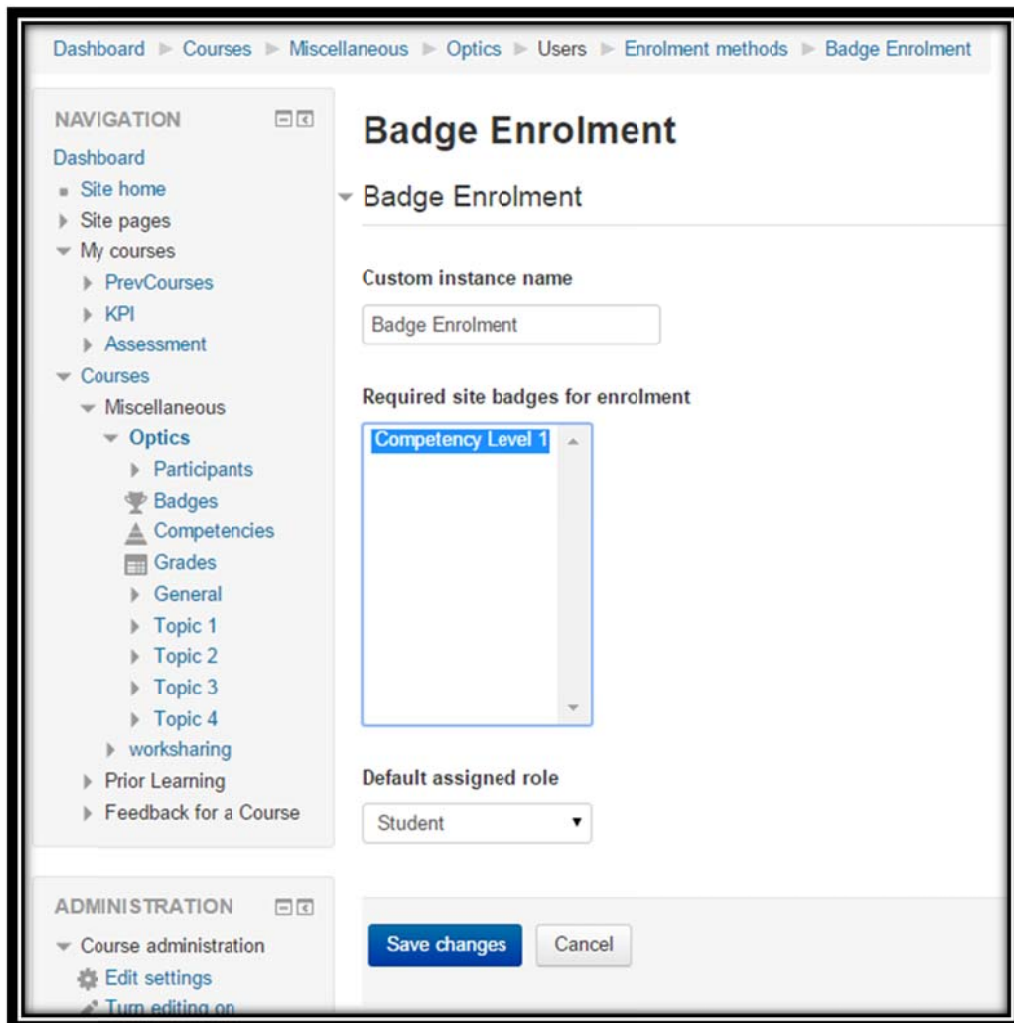
**NAVIGATION**

- Dashboard
- Site home
- Site pages
- My courses
  - PrevCourses
  - KPI
  - Assessment
- Courses
  - Miscellaneous
    - Optics**
      - Participants
      - Badges
      - Competencies
      - Grades
      - General
        - Topic 1
        - Topic 2
        - Topic 3
        - Topic 4
      - worksharing
    - Prior Learning
    - Feedback for a Course

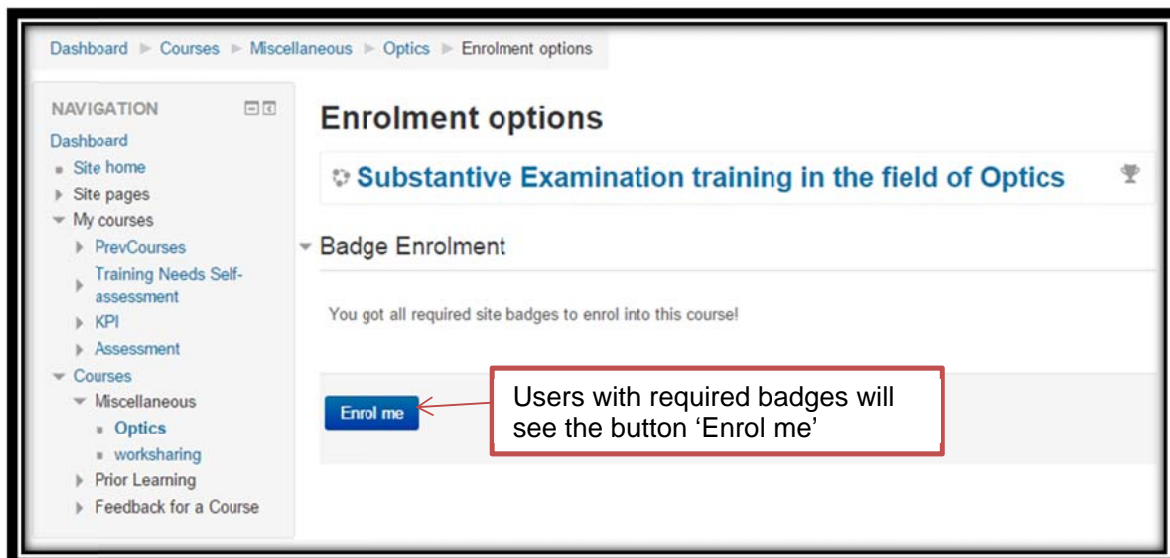
**ADMINISTRATION**

- Course administration
  - Edit settings
  - Turn editing on
  - Course completion
- Users
  - Enrolled users
  - Enrolment methods**

Click the badge(s) required for a user to qualify to enroll in the course, then click 'Save changes'.



Therefore, a user who has the badge can enroll into the course, while a user who does not have the badge will not be able to enroll into the course. A screenshot of a user with and without the required badges are shown below.



The screenshot shows a Moodle course page titled "Substantive Examination training in the field of Optics". The breadcrumb trail is "Dashboard > Courses > Miscellaneous > Optics > Enrolment options". On the left is a navigation menu with categories like "Dashboard", "My courses", and "Courses". The main content area is titled "Enrolment options" and shows a course badge for "Substantive Examination training in the field of Optics". Below the badge, it states "You need the following site badge(s) to enrol into this course:" followed by a "Competency Level 1" badge. A red-bordered box highlights the text: "Users without required badges will not be able to enroll into the course".

### Upload Files in User Profile

Sometimes, an examiner is requested to submit curriculum vitae (CV) in order for him/her to be nominated for a training course. It would also be a good practice for a manager / coordinator in a patent office to have CV of all examiners in the office.

By default, the user profile input is only in the form of text or date input, or a choice from a dropdown menu. However, this plugin allows a user to upload files in the user profile. The plugin can be downloaded here: [https://moodle.org/plugins/profilefield\\_file](https://moodle.org/plugins/profilefield_file)

The screenshot shows the Moodle plugin page for "User profile fields: File upload". The plugin ID is "profilefield\_file" and it was released in 2016121900. It is compatible with Moodle versions 2.7, 2.8, 2.9, 3.0, 3.1, 3.2, 3.3, and 3.4. The page shows "Install now" and "Download" buttons, with the "Download" button circled in red. Below the buttons, it indicates "code prechecks 3 | 14". The description states: "This is a file upload profile field plugin for Moodle. Using this plugin, you can define new profile fields to ask users to upload some files through them. If this plugin makes your life easier you can treat me a coffee ☺". There is a "Buy Me a Coffee" button at the bottom.

After downloading the zip file, go to *Site administration > Plugins > Install Plugins*. Drag the zip file to the box under the header 'Install plugin from ZIP file'.

Dashboard > Site administration > Plugins > Install plugins

Blocks editing on

## Plugin installer

Install plugins from the Moodle plugins directory

Install plugin from ZIP file

ZIP package \*

Choose a file...

profilefield\_file\_moodle34\_2016121900.zip

Drag the ZIP file to this box

Show more...

Install plugin from the ZIP file

Click here to proceed

When the installation is successful, click 'Continue' to proceed. On the next screen, click 'Update Moodle database now'.

## Install plugin from ZIP file

Validating profilefield\_file ... OK

Validation successful, installation can continue

Continue Cancel

## Plugins requiring attention

Cancel new installations (1) Plugins requiring attention **1** All plugins **422**

Plugin name / Directory	Current version	New version	Requires	Source / Status
File upload /user/profile/field/file	2016121900	• Moodle 2014050800		Additional <b>To be installed</b> Cancel this installation

[Reload](#)  
[Upgrade Moodle database now](#)

If the installation is successful, this screen will be shown. Click 'Continue' to finish installation.

## Upgrading to new version

### profilefield\_file

Success

[Continue](#)

Now, go to *Site administration > Users > Accounts > User profile fields*. 'File upload' option is now available from the dropdown menu for creating a new profile field.

## Patent Examination details

**User profile fields**

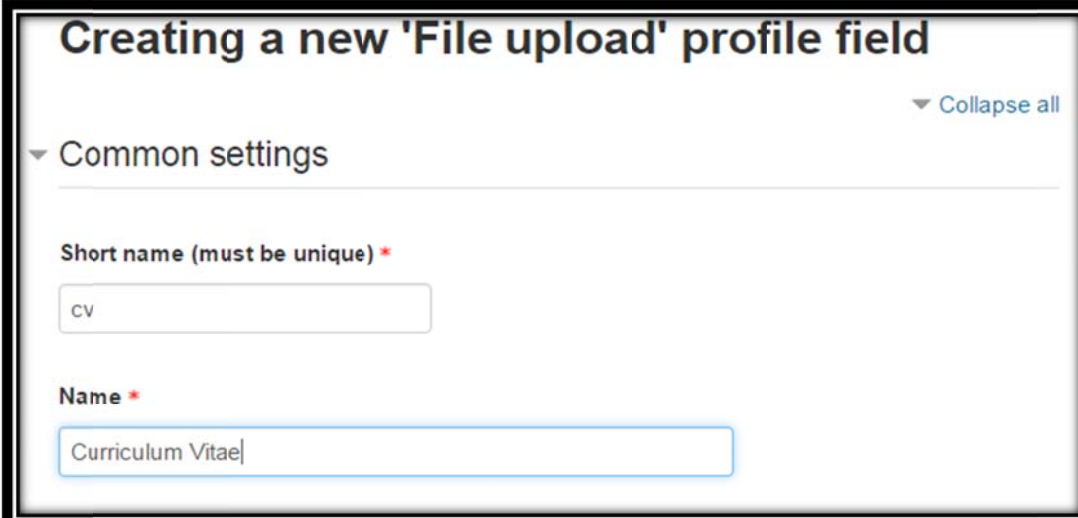
Recruitment as a Patent Examiner ⚙️ ✕ ⏴

Technical Fields ⚙️ ✕ ⏴

Create a new profile field: Choose... OR Create a new profile category

- Choose...
- Checkbox
- Date/Time
- Dropdown menu
- File upload**
- Text area
- Text input

Assuming the file uploaded is related to CV, the short name can be cv, while the name can be 'Curriculum Vitae'. Other options include whether to make this field a requirement in the profile page, maximum number of attachments allowed, visibility to other users, etc. Click 'Save changes' to continue.

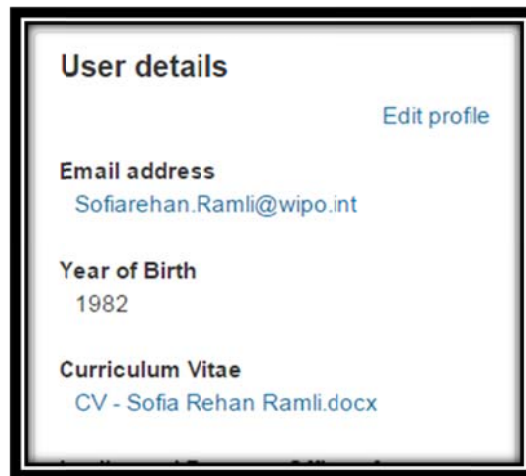


The screenshot shows a form titled "Creating a new 'File upload' profile field". At the top right, there is a "Collapse all" link. Below the title is a section for "Common settings". The form contains two required fields: "Short name (must be unique) \*" with the value "cv" entered, and "Name \*" with the value "Curriculum Vitae" entered.

So, when a user goes to the 'Edit profile' page, he/she will see the option to upload a file under the new profile field 'Curriculum Vitae'. In this example, only 1 attachment is allowed.



The uploaded file will be displayed on the profile page under the user details.

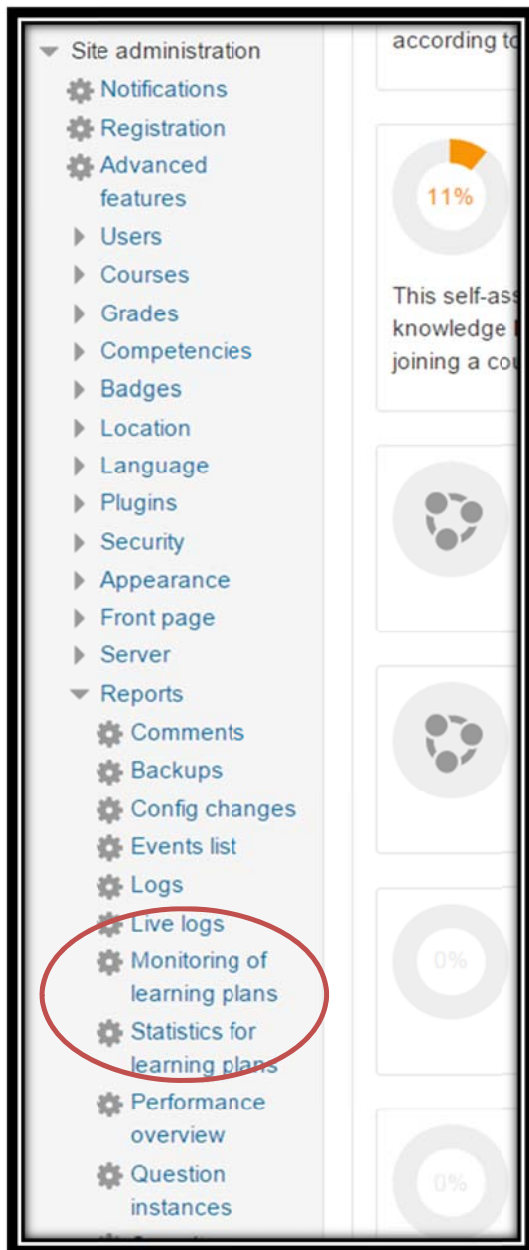


### Monitoring of Learning Plans

This plugin is useful in providing an overview and statistics of user learning plan without having to go through the user's profile page. The download and instructions page can be found here: [https://moodle.org/plugins/report\\_lpmonitoring](https://moodle.org/plugins/report_lpmonitoring)

After a successful installation, the new features can be found by going to *Site administration* > *Reports* > *Monitoring of learning plans* or *Statistics for learning plans*.





Under the item 'Monitoring of learning plans', overview of users by learning plan template can be viewed. Choose the desired template, optionally choose the specific user, then click 'Apply' to view the performance.

NAVIGATION

- Dashboard
  - Site home
  - Site pages
- My courses
  - PrevCourses
  - Training Needs
  - Self-assessment
  - KPI
  - Optics
  - Assessment
  - ipc\_chemistry
  - WIPO\_DL

ADMINISTRATION

- Site administration
  - Notifications
  - Registration
  - Advanced features
  - Users
  - Courses
  - Grades

## Monitoring of learning plans

Filter

Filter by

- Learning plan template
- User

Learning plan template

- Supplementary Learning Plan Template
- Choose a learning plan template
- Supplementary Learning Plan Template
- Training for Patent Examiners Level 1
- No user selected

Choose a user

Show more...

Apply

Supplementary Learning Plan Template

Supplementary Learning Plan Template

Admin User

Status: Active

1/4 Competencies proficient

0 Competencies not proficient

3 Competencies not rated

Expand all

> Work-Sharing 8	Not rated ?
> Produce Examination Reports 10	Not rated ?
> Supplementary 13	Not rated ?
> Nature and function of IP rights 1.1	Proficient ✓

Click the arrow to browse through the users having the same learning plan

List of competencies and proficiency of each of competency

Each competency can be expanded, and it will show the details that contributed to the proficiency of the competency (e.g. rating given and course linked to the competency).

The screenshot shows a user interface for managing competencies. It includes a dropdown menu for 'Nature and function', a 'Total number of ratings' section showing '0/0', a 'No data available' indicator, and a legend for 'Not yet competent' (pink) and 'Competent' (blue). Below this is an 'Evidence of prior learning' section showing '1', and a 'Final rating' section with a 'Competent' button and a 'Rate' button. A 'Proficient' status with a green checkmark is also visible. Three red callout boxes provide instructions: the first points to the '0/0' ratings, the second points to the '1' evidence of prior learning, and the third points to the 'Rate' button.

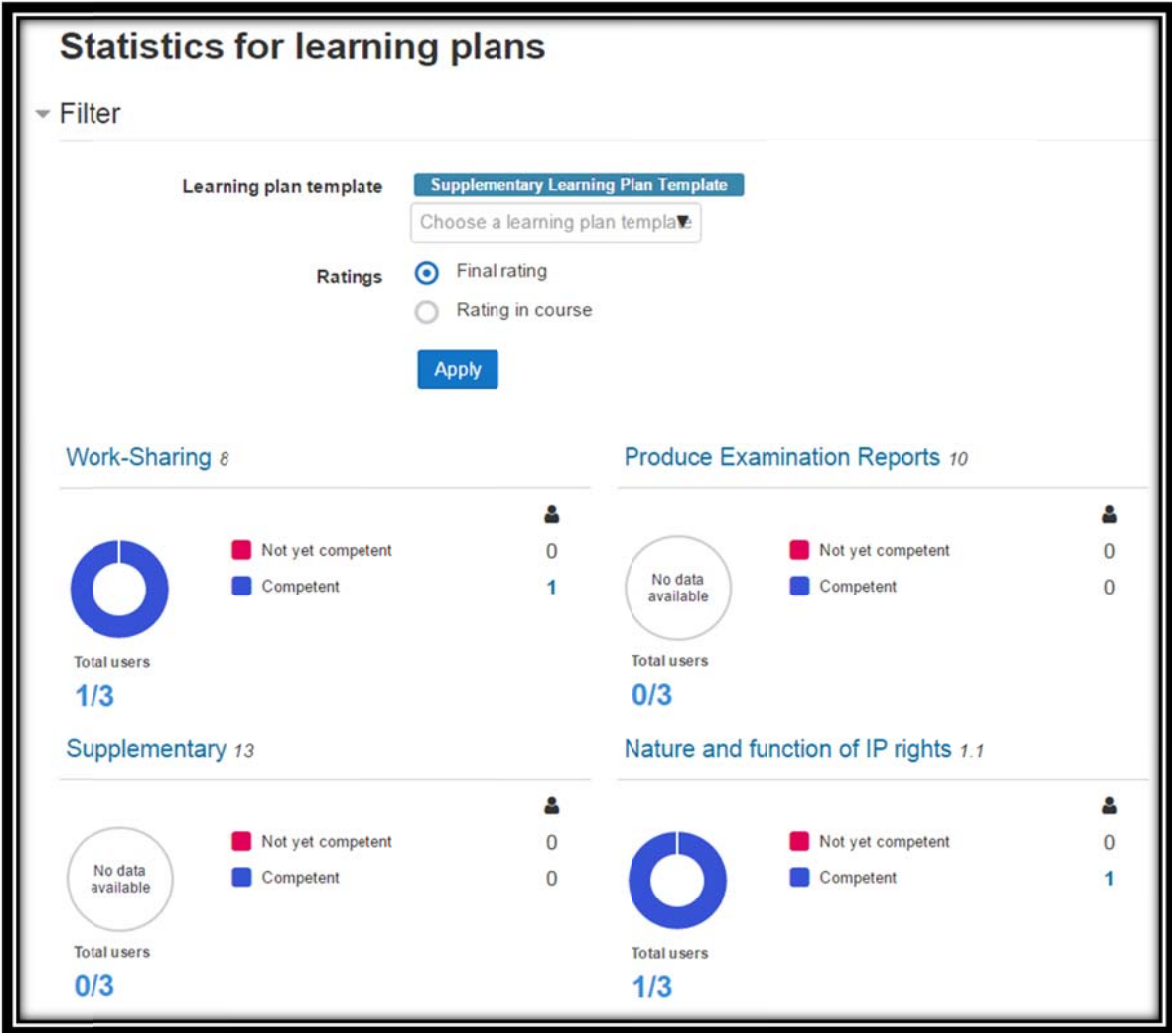
Clicking the number of ratings will show the course related to the competency, and indication that the course has been rated

Any evidence of prior learning related to the competency will be shown here

The final rating of the competency can also be manually given via this page, by clicking the 'Rate' button

Another feature of this plugin is a report on statistics for all users under the same learning plan template. This can be accessed from *Site administration > Reports > Statistics for learning plans*.

By choosing the desired learning plan template, statistics on all competencies will be displayed. Immediately a manager can know how many users are proficient / not yet proficient for each competency. From the number of total users per competency, it would also be easy to identify which users that are not yet rated. Clicking the number under 'Total users' would show the list of users having the learning plan.



Although so far there is no overview according to cohorts, a possible workaround would be creating a learning plan template that will be assigned to all users in the cohort. Since Moodle permits multiple learning plan templates to be assigned to one user, as long as the name of the template differs, it does not matter whether the competencies in the template are the same as other template.