



Moodle Plug-in for evasys

Imprint

evasys GmbH

Konrad-Zuse-Allee 13
21337 Lüneburg
Germany
Phone: +49 4131 7360 0
Telefax: +49 4131 7360 60
E-Mail: info@evasys.de

Managing director: Silvio Ewert, Dr. Laurent Lazar

VAT ID: DE 179 384 158
Commercial register: HRB-Nr. 1604, Lüneburg

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Changes and errors excepted.

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1. Overview

The “Moodle Plug-in for evasys” allows you to quickly and easily integrate survey information data from evasys into Moodle.

Two types of connection are available: Data can be exchanged either via an LTI[®] interface or via SOAP web services. Depending on the type of connection, different functions are at your disposal. When using LTI[®], you can display survey information in the learner view as well as in the instructor view. When using SOAP, survey information can only be displayed in the learner view. In the following, the two connection types are briefly contrasted.

1.1. Connection via LTI[®]

In comparison to a SOAP interface the LTI[®] interface provides a larger range of functions:

- The evasys block shows student users links to and information about available online surveys.

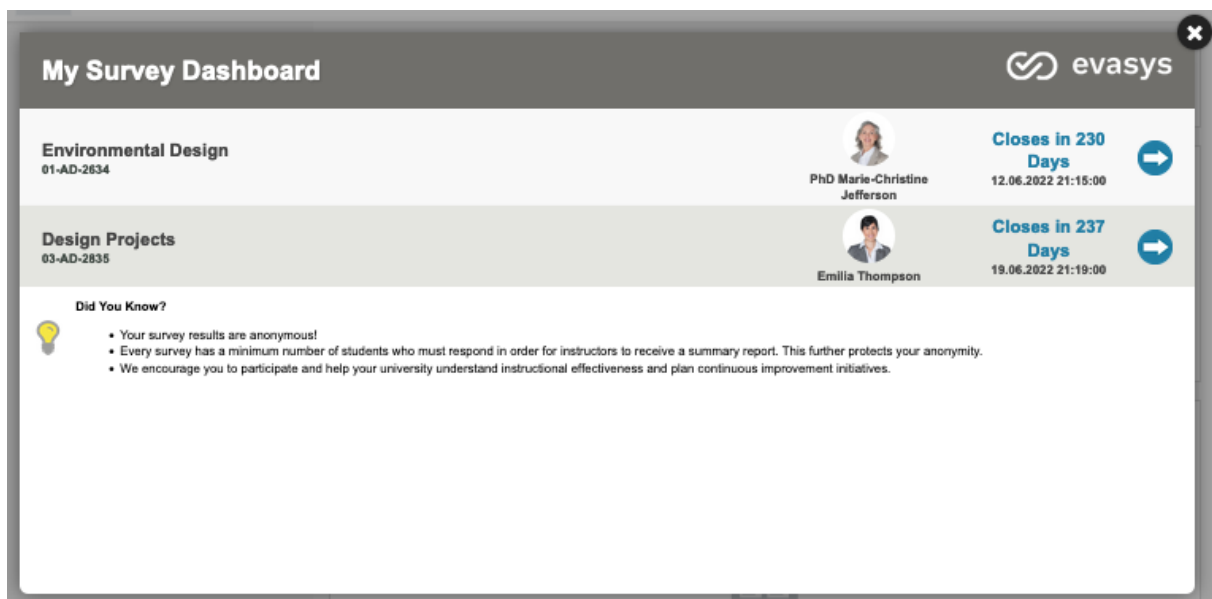


Figure 1: Survey list in learner view (LTI[®])

- In the instructor view you can display an overview of the current evaluations with information on ongoing surveys.

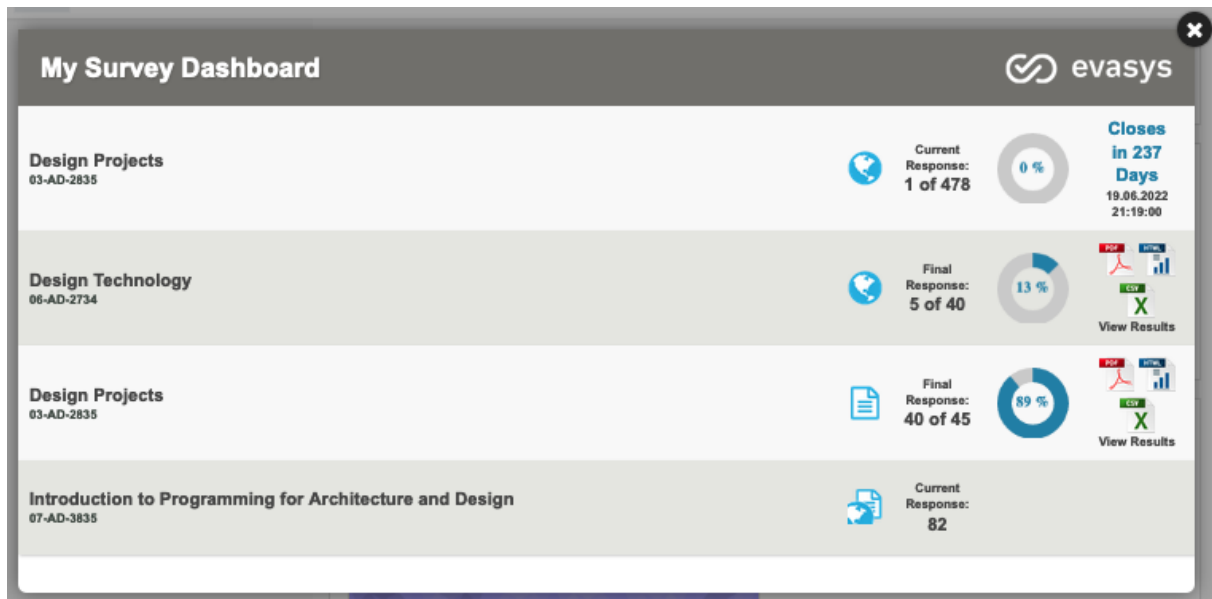


Figure 2: Survey list in lecturer view (LTI®)

Administrators can customize the appearance and structure of the survey list using HTML and CSS templates. For further information, please consult the separately available evasys LTI® manual which can be downloaded in the evasys menu “System Settings / Documentation”.

1.2. Connection via SOAP

If the data transfer from evasys to Moodle is performed by SOAP API, the range of functions is limited. In the learner view the evasys block only shows a list of links to open online surveys. There is no instructor view.

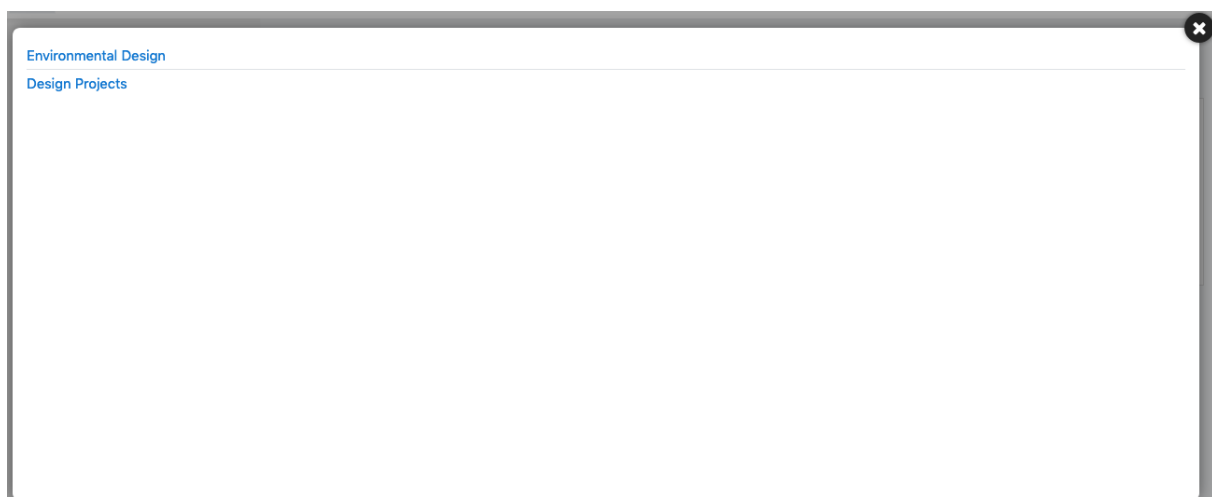


Figure 3: Survey list in student view (SOAP)

1.3. General Information

By implementing a single sign-on solution, learners as well as instructors only have to register with Moodle. It is not necessary to enter evasys PSWDs to participate in surveys.

The internationalization possibilities of Moodle by using the Moodle multilang filter syntax are supported. If you choose a SOAP connection, English and German language sets are available. The LTI® templates are completely configurable. However, please note, that they do not consider the language selected in Moodle. This means, only the language defined in the template will be used.

1.4. System requirements

The evasys Block is tested und published for the currently supported Moodle core versions (see https://docs.moodle.org/dev/Releases#Version_support).

Evasys 7.1 (2151) or higher is required for the evasys Block to work.

2. Network Preparations

Since the Moodle server will communicate via web service calls with the evasys server, it is essential to make sure that there's a valid network route between both server systems.

Technically, evasys communicates via HTTP or HTTPS. By default, this means that the ports 80 or 443 are used for communication with Moodle.

In order to implement a seamless installation process, it is recommended to check on this network route with the IT administration department in charge of the actual Moodle and evasys servers.

3. evasys Preparations

Depending on whether you opt for a connection via LTI® or SOAP, different preparatory steps need to be taken. Both ways will be described in the following.

3.1. Activating the LTI® Interface

The LTI® interface can be activated in the evasys administrators' interface. To access the settings please go to "System Settings/ Interfaces & Plug-ins/ LTI® Interface".

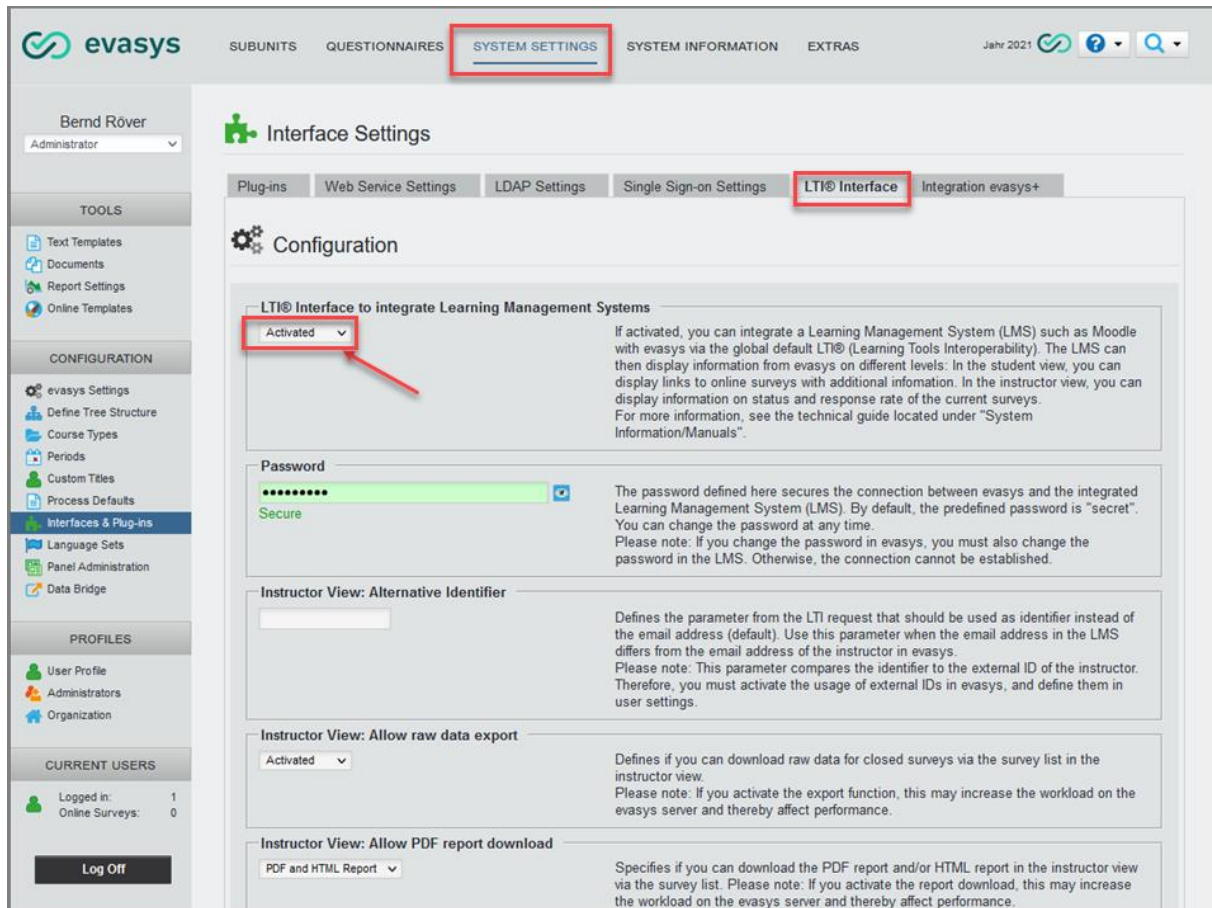


Figure 4: Activating the LTI® interface

Here you can activate the "LTI® Interface to integrate Learning Management Systems". In addition, you must define a password which protects the connection between evasys and Moodle. The default password is "secret". Please note that if you change the password here you need to change it in Moodle as well.

At the bottom of the page you can upload your own custom LTI® templates if you wish. If you do not upload a customized template, the standard template is used. For further information, please consult the evasys Technical Guide which you can download in the evasys menu "System Information / Manuals".

3.2. Web Service Configuration

To enable communication between evasys and Moodle via SOAP, the evasys web service interface must be configured by an administrator. To do this, open the menu "Settings / Interfaces & Plug-ins / Web Service Settings" in evasys.

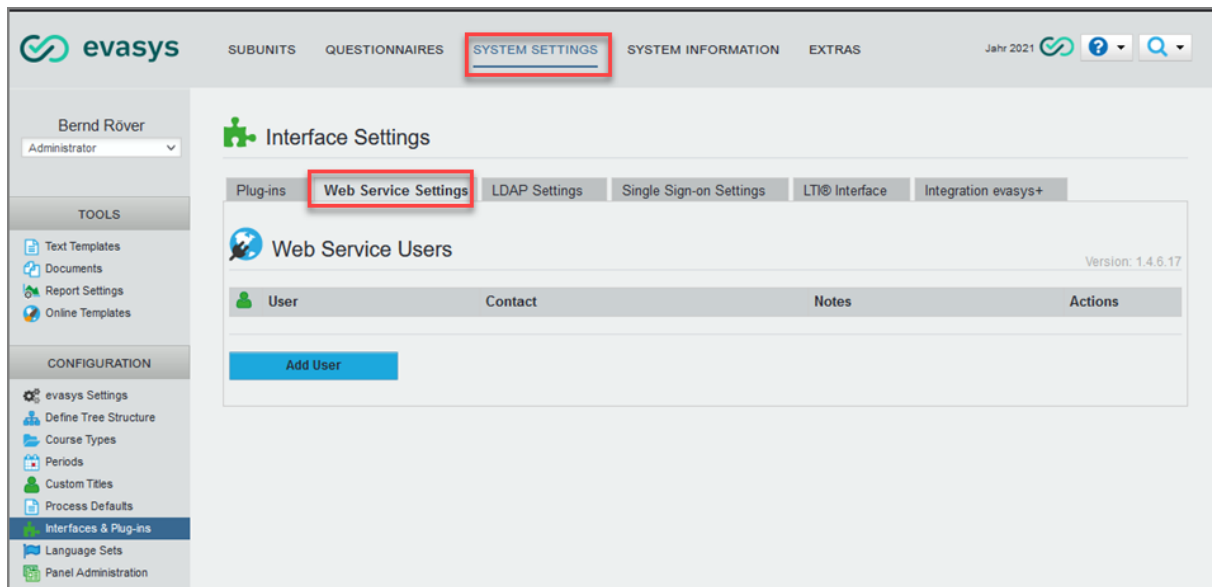


Figure 5: Web Service Settings

Adding a new Web Service User

For connecting Moodle, web servers have to be added via the Web Service Users section. This area contains a list of existing web service users and an **[Add User]** button.

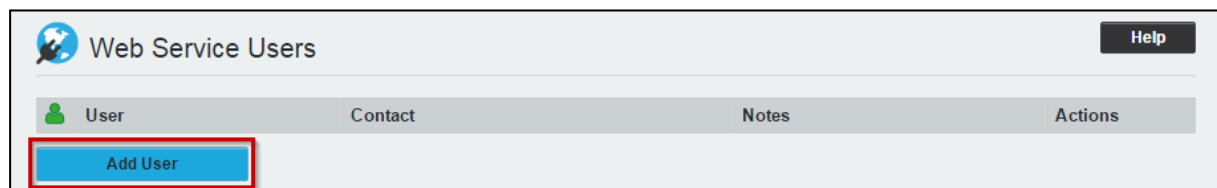


Figure 6: Web Service Users

Login name and password are mandatory (later to be configured in the evasys block); other fields are optional when creating a new web service user.

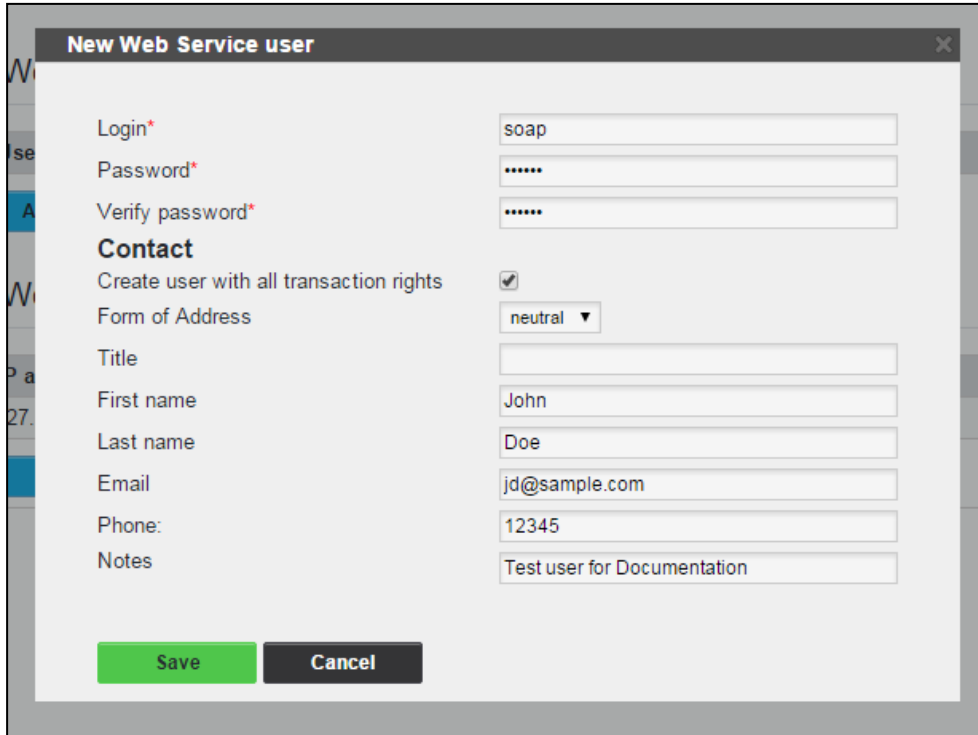


Figure 7: Adding new web service user

The IP address range must also be configured. The IP address of the connected Moodle server is configured in the "Web Service IP-Address Settings" tab.

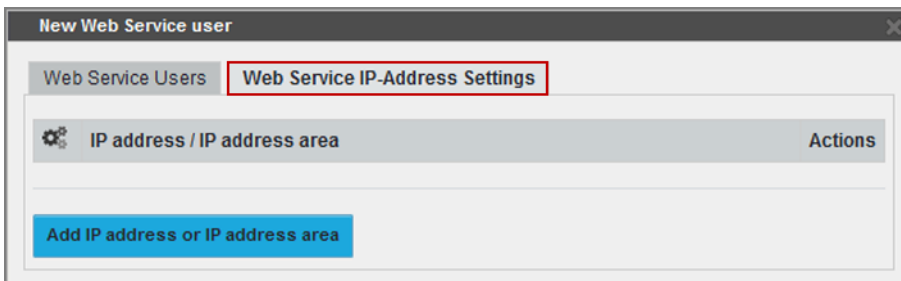


Figure 8: Adding new web service user


Individual IP addresses or IP address ranges can be specified. The latter is only helpful for load balancing or redundant systems.

It is important that the connected server and the evasys server can communicate via the configured IP. When using proxy servers, it may be necessary to store the IP of the proxy server.

If a non-configured system tries to use the evasys web service, an error message appears.

Complete the process of adding web service users by clicking the **[Save]** button in the "Web Service user" tab.

Configuring Transaction Rights

It is important to create new web service users with the necessary transaction right. Please first click on the icon  to display the available transaction rights.

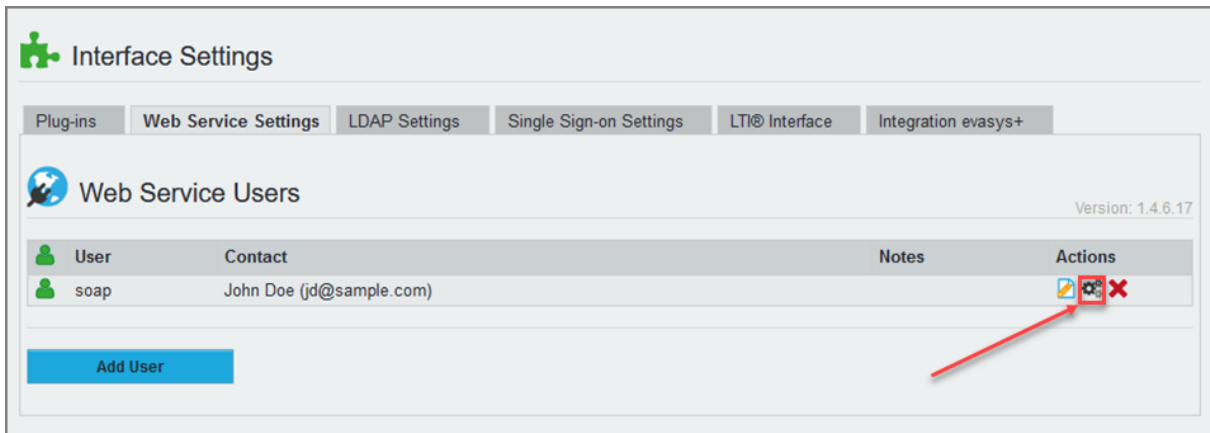


Figure 9: Open Web Service Transaction rights

Then select “getpswdbyparticipant” in the list and click **[Save]** at the end of the list.

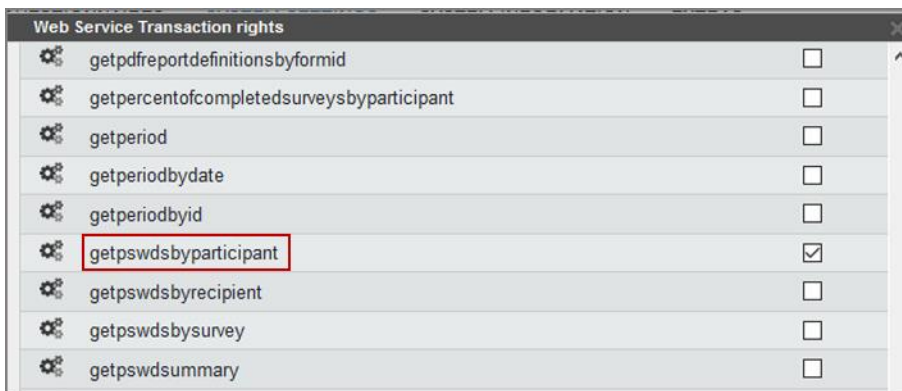





Figure 10: Web Service Transaction rights

Editing and Removing a Web Service User

Existing web service users can be edited using the icons  and  located in the “Actions” column. They can be deleted by using the icon .

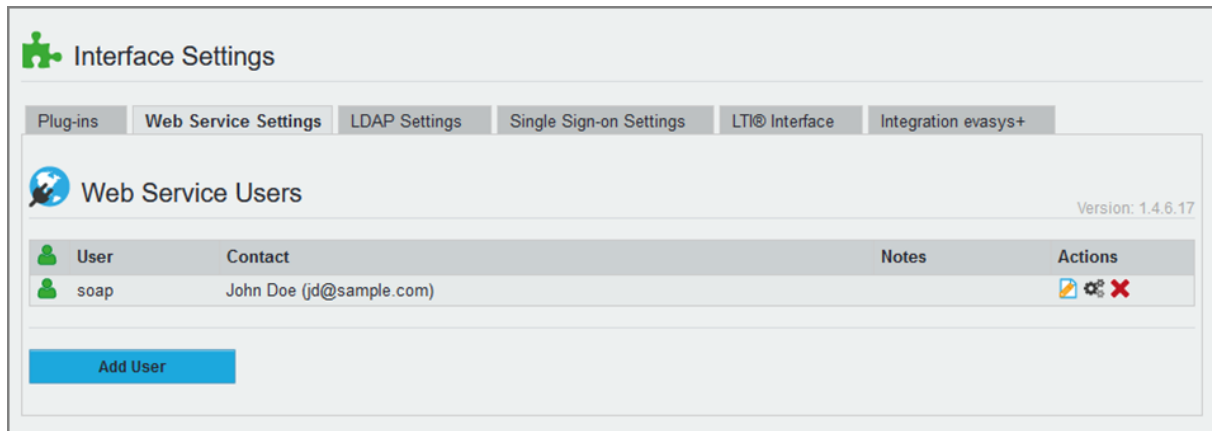


Figure 11: Actions column

Editing the WSDL File

Finally, locate the evasys WSDL file and enter the server’s IP (the evasys server) at the very end of the file.

Replace ‘localhost’ with the actual IP or DNS name in this line:

```
<SOAP-address location="http://localhost/evasys/services/SoapServer-V51.php"/>
```

Default path to the WSDL:

```
c:\inetpub\wwwroot\evasys\services\soapserver-v51.wsdl
```

Please note, that the v5.1 WSDL file must be used with newer versions of evasys as well.

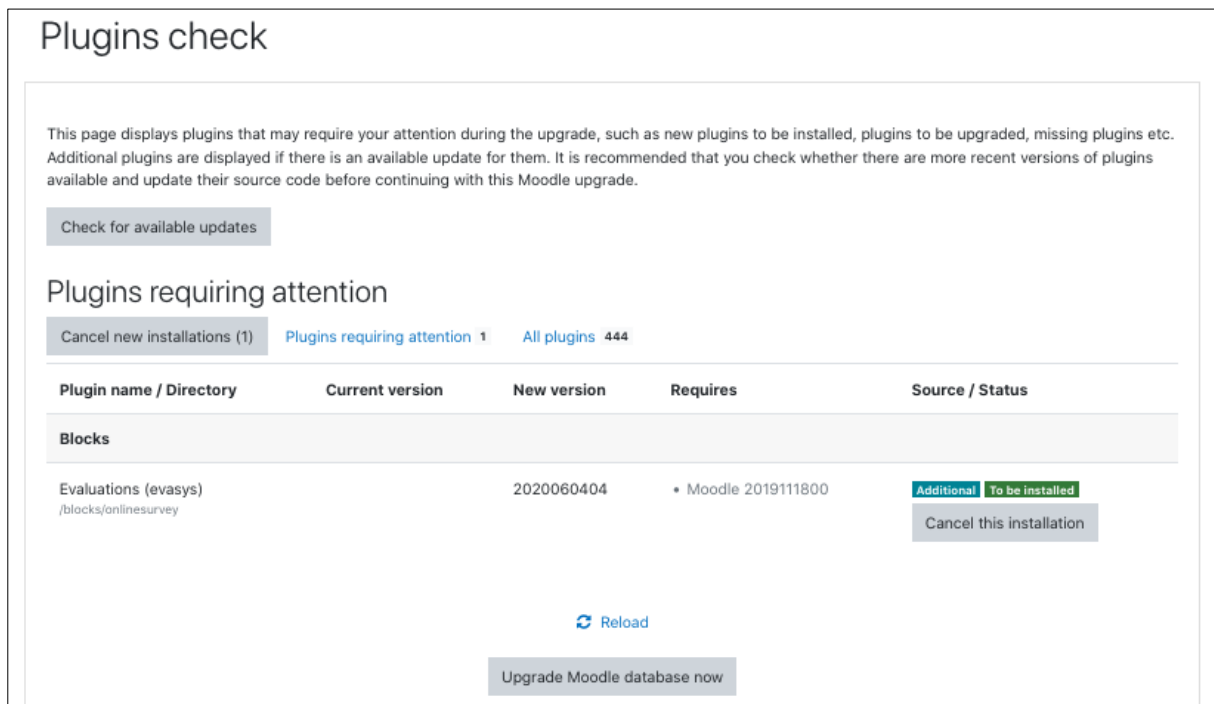
4. Installation in Moodle

4.1. Plugin installation

The plug-in installation is conducted by copying the installation package directly into the file system. The destination directory is:

[MOODLE INSTALLATION DIRECTORY]\blocks\onlinesurvey

After performing the copy operation, log in as administrator and you will see the notification screen with a list of the new plugins:



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.

[Check for available updates](#)

Plugins requiring attention

[Cancel new installations \(1\)](#) [Plugins requiring attention 1](#) [All plugins 444](#)

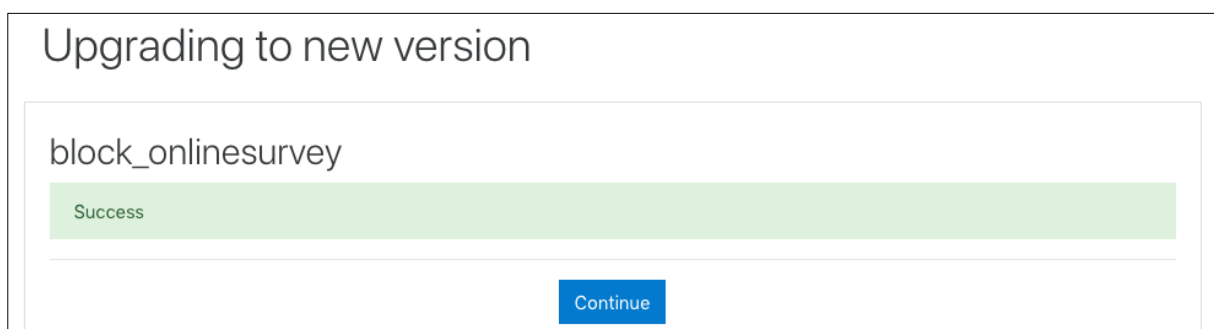
| Plugin name / Directory | Current version | New version | Requires | Source / Status |
|--|-----------------|-------------|---------------------|--|
| Blocks | | | | |
| Evaluations (evasys) /blocks/onlinesurvey | | 2020060404 | • Moodle 2019111800 | Additional To be installed Cancel this installation |

[Reload](#)

[Upgrade Moodle database now](#)

Figure 12: Plug-in installation

Click **[Upgrade Moodle database now]** on the bottom of the page to proceed with the installation:



Upgrading to new version

block_onlinesurvey

Success

[Continue](#)

Figure 13: Installation complete

Click the button **[Continue]** to get to the next step of the installation.

General settings for the presentation of the evasys block can be made as well as specific settings for the connection via SOAP or LTI®.

You can define the **appearance** options of the block:

- **Title:**
The text entered is used as the block title. You can define more than one language (e.g. English and German) by using the Moodle multilanguage filter syntax (see https://docs.moodle.org/en/Multi-language_content_filter for details)
- **Display mode:**
In compact mode, the evasys Block displays the number of open surveys by means of a graphic. In this mode an enlarged list view can be opened if the user has at least one open survey by clicking on the graphic.
In the detailed display mode, the links to the online surveys are provided directly in the evasys block (only for communication via SOAP). If the communication takes place via LTI®, open surveys are listed directly in the block.
- In this mode an enlarged list view can be opened by clicking the button below the list, if the user has at least one open survey

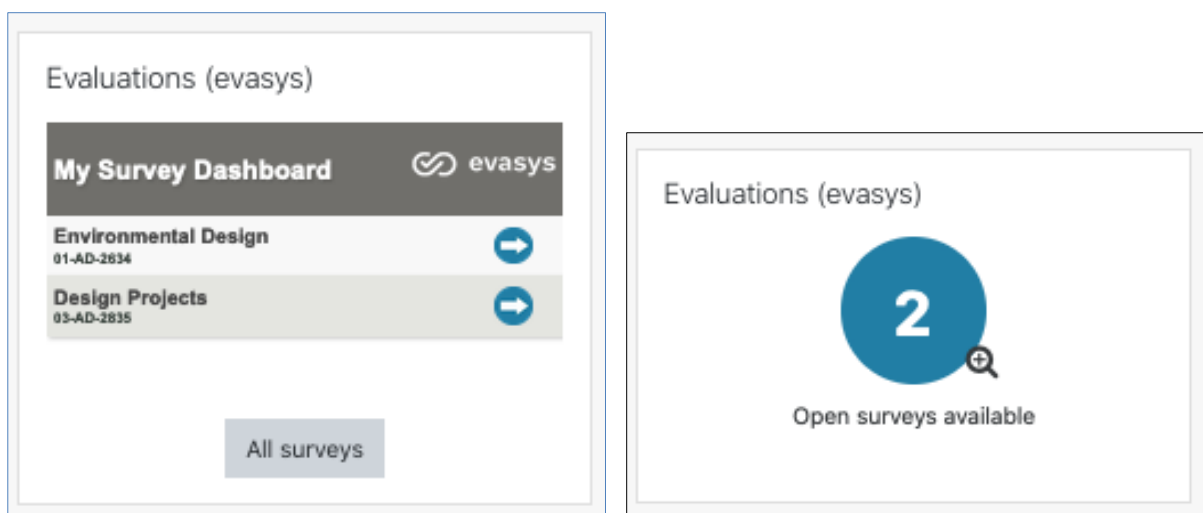


Figure 144: Display mode of the block – Detailed (left) and Compact (right)

- **Hide empty block:**
If activated, the evasys block is hidden when the user has no surveys. If it is not activated, in the compact view a graphic with the text “No open evaluations available” is displayed and in the detailed view an empty list is presented.
Please note: If the LTI® template you are using is configured in a way that participants are allowed to access results for surveys they have taken part in, you may not want to hide the block. Otherwise, the participants will no longer be able to access the results.
- **Always offer enlarged list view:**
If activated, the user will always be able to open the enlarged list view. If not activated, the user will only be able to open the enlarged list view if he has open surveys.
Please note: If the LTI template you are using is configured in a way that participants are allowed to access results for surveys they have taken part in,

you will want to enable this setting. Otherwise, the participants will no longer be able to access the results.

- **Show spinner:**

If activated, a spinner icon will be shown in the block until the open surveys are loaded from evasys.



Figure 15: Spinner icon – Activated (left) and not activated (right)

- **Pop-up info active:**

If activated, a pop-up with an information about open online surveys (if existing) is displayed every time a student logs in to Moodle.

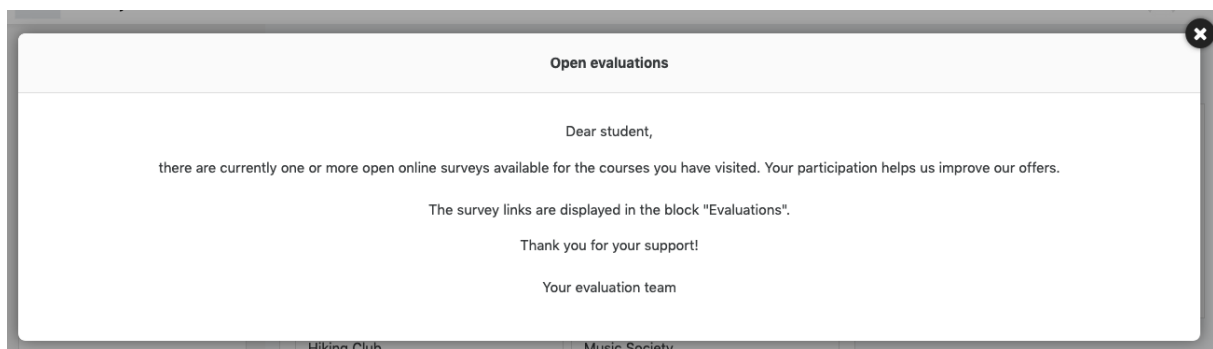


Figure 16: Pop-up info after login

- **Pop-up title:**

If needed, the title of the pop-up can be modified with this setting. You can define more than one language (e.g. English and German) by using the Moodle multilanguage filter syntax (see https://docs.moodle.org/en/Multi-language_content_filter for details).

- **Pop-up content:**

If needed, the content which is presented in the pop-up can be modified with this setting. You can define more than one language (e.g. English and German) by using the Moodle multilanguage filter syntax (see https://docs.moodle.org/en/Multi-language_content_filter for details).


| | |
|---|--|
| Title block_onlinesurvey blocktitle | <input type="text" value="Evaluations (evasys)"/> Default: Evaluations (evasys) |
| The text entered here is used as the block title. You can define more than one language (e.g. English and German) by using the Moodle multilanguage filter syntax (see https://docs.moodle.org/en/Multi-language_content_filter for details). | |
| Display mode block_onlinesurvey presentation | <input type="button" value="Compact"/> Default: Compact |
| In compact mode, the evasys Block displays the number of open surveys by means of a graphic. In this mode, an enlarged list view can be opened as soon as the user has at least one open survey by clicking on the graphic. In detailed mode, the evasys Block displays the list of available surveys directly. In this mode, but only when using a SOAP connection, an enlarged list view can be opened as soon as the user has at least one open survey by clicking a button below the list. | |
| Hide empty block block_onlinesurvey survey_hide_empty | <input type="checkbox"/> Default: No If activated, the evasys block is hidden when the user has no surveys. If it is not activated, in the compact view a graphic with the text "No open evaluations available" is displayed and in the detailed view an empty list is presented. <i>Please note: If the LTI template you are using is configured in a way that participants are allowed to see and/or access results for surveys they have taken part in, you may not want to hide the block. Otherwise, the participants would no longer be able to access the results.</i> |
| Always offer enlarged list view block_onlinesurvey offer_zoom | <input checked="" type="checkbox"/> Default: Yes If activated, the user will always be able to open the enlarged list view. If not activated, the use will only be able to open the enlarged list view if he has open surveys. <i>Please note: If the LTI template you are using is configured in a way that participants are allowed to see and/or access results for surveys they have taken part in, you will want to enable this setting. Otherwise, the participants would no longer be able to access the results.</i> |
| Show spinner block_onlinesurvey show_spinner | <input checked="" type="checkbox"/> Default: Yes If activated, a spinner icon will be shown in the block until the open surveys are loaded from evasys. |
| Pop-up info active block_onlinesurvey survey_show_popupinfo | <input type="checkbox"/> Default: No If activated, a pop-up with an information about open online surveys (if existing) is displayed every time a student logs in to Moodle. |
| Pop-up title block_onlinesurvey survey_popupinfo_title | <input type="text" value="Open evaluations"/> Default: Open evaluations If needed, the title of the pop-up can be modified with this setting. You can define more than one language (e.g. English and German) by using the Moodle multilanguage filter syntax (see https://docs.moodle.org/en/Multi-language_content_filter for details). |
| Pop-up content block_onlinesurvey survey_popupinfo_content | <div> <div> <input type="button" value="↕"/> <input type="button" value="A"/> <input type="button" value="B"/> <input type="button" value="I"/> <input type="button" value="List"/> <input type="button" value="List"/> <input type="button" value="List"/> <input type="button" value="List"/> <input type="button" value="Link"/> <input type="button" value="Text"/> <input type="button" value="Image"/> <input type="button" value="H-P"/> </div> <div> <p>Liebe(r) Studierende,</p> <p>aktuell sind Sie für eine oder mehrere Onlineumfragen zur Evaluation der von Ihnen besuchten Lehrveranstaltungen freigeschaltet. Mit Ihrer Teilnahme helfen Sie uns sehr, unser Studienangebot zu verbessern.</p> <p>Die Links zu den Befragungen werden Ihnen im Block "Evaluationen" angezeigt.</p> <p>Vielen Dank für Ihre Unterstützung!</p> <p> A draft version of this text was automatically restored.</p> <p>Default:</p> <pre><p>Dear student,</p> <p>there are currently one or more open online surveys available for the courses you have visited. Your participation helps us improve our offers. The survey links are displayed in the block "Evaluations".</p> <p>Thank you for your support! Your evaluation team</p></pre> <p>If needed, the content which is presented in the pop-up can be modified with this setting. You can define more than one language (e.g. English and German) by using the Moodle multilanguage filter syntax (see https://docs.moodle.org/en/Multi-language_content_filter for details).</p> </div> </div> |

Figure 17: Block settings dialog

Further, you can define the **communication** options of the block:

- **Communication protocol:**
Define whether Moodle should communicate with evasys via SOAP or LTI®.
Depending on the communication protocol selected here, please do your further settings in the corresponding protocol section below.
- **User Identifier:**
Select whether a user's email address or username should be used as unique user identifier.
- **Custom field in evasys:**
If the username is selected as user identifier, one of the first three custom fields in evasys can be used for authentication.
Please note: This setting is only relevant for learners. If you decide to use the username for instructors, the username must be stored in evasys in the field "External ID" of the user settings
- **Connection timeout:**
Maximum response time (in seconds) of the evasys server. If the evasys server didn't answer within this time, the request is aborted, and the surveys are not shown to the user.

| | |
|--|---|
| Communication protocol <small>block_onlinesurvey connectiontype</small> | <div> <input type="text" value="LTI"/> Default: LTI </div> <p>Here you can define whether Moodle should communicate with evasys via SOAP or LTI. <i>Depending on the communication protocol selected here, please do your further settings in the corresponding protocol section below.</i></p> |
| User identifier <small>block_onlinesurvey useridentifier</small> | <div> <input type="text" value="Email address"/> Default: Email address </div> <p>Select whether a user's email address or username should be used as unique user identifier.</p> |
| Custom field in evasys <small>block_onlinesurvey customfieldnumber</small> | <div> <input type="text" value="Custom field No. 1"/> Default: Custom field No. 1 </div> <p>If the username is selected as user identifier, one of the first three custom fields in evasys can be used for authentication. <i>Please note: This setting is only relevant for learners. If you decide to use the username for instructors, the username must be stored in evasys in the field "External ID" of the user settings.</i></p> |
| Connection timeout <small>block_onlinesurvey survey_timeout</small> | <div> <input type="text" value="0"/> Default: 0 </div> <p>Maximum response time (in seconds) of the evasys server. If the evasys server didn't answer within this time, the request is aborted and the surveys are not shown to the user.</p> |

Figure 188: Communication settings dialog

When using **SOAP**, configure the following settings:

- **evasys SOAP WSDL URL:**
URL of the web service description file on the evasys server
([https://\[SERVERNAME\]/evasys/services/soapserver-v51.wsdl](https://[SERVERNAME]/evasys/services/soapserver-v51.wsdl)).
Please note: If evasys is operated with several servers (dual server option),

the backend server on which users and administrators work, must be specified here. This prevents a too high load on the online survey server.

- **evasys SOAP path for online surveys:**
URL of the evasys online survey login ([http://\[SERVERNAME\]/evasys/](http://[SERVERNAME]/evasys/)).
- **evasys SOAP username:**
Username of the evasys SOAP user (cf. section evasys preparations).
- **evasys SOAP password:**
Password of the evasys SOAP user (cf. section evasys preparations).
- **Request SOAP data on every rendering:**
If activated, the data which is rendered in the evasys block will be requested from evasys each time the block is rendered. If not activated, the data is only requested once per session (i.e. only once a user logged into Moodle)


| | |
|--|---|
| evasys SOAP WSDL URL <small>block_onlinesurvey survey_server</small> | <input type="text"/> Default: Empty URL of the web service description file on the evasys server (https://[SERVERNAME]/evasys/services/soapserver-v61.wsdl). <i>Please note: If evasys is operated with several servers (dual server option), the backend server on which users and administrators work, must be specified here. This prevents a too high load on the online survey server.</i> |
| evasys SOAP path for online surveys <small>block_onlinesurvey survey_login</small> | <input type="text"/> Default: Empty URL of the evasys online survey login (https://[SERVERNAME]/evasys/). |
| evasys SOAP username <small>block_onlinesurvey survey_user</small> | <input type="text"/> Default: Empty User name of the evasys SOAP user. |
| evasys SOAP password <small>block_onlinesurvey survey_pwd</small> | Click to enter text  Password of the evasys SOAP user. |
| Request SOAP data on every rendering <small>block_onlinesurvey soap_request_eachtime</small> | <input type="checkbox"/> Default: No If activated, the data which is rendered in the evasys block will be requested from evasys each time the block is rendered. If not activated, the data is only requested once per session (i.e. only once a user logged into Moodle). |

Figure 199: SOAP settings

When using LTI®, configure the following settings:

- **evasys LTI® provider URL:**
URL of the LTI® provider PHP file on the evasys server ([https://\[SERVERNAME\]/customer/lti/lti_provider.php](https://[SERVERNAME]/customer/lti/lti_provider.php)).
- **evasys LTI® password:**
Password of the evasys LTI® interface (cf. section evasys preparations).
- **evasys LTI® Custom Parameter:**
Here the custom parameters are stored, which can be used to define settings

for displaying the surveys, e.g. whether the student view should also display completed surveys (`learner_show_completed_surveys=1`) or whether the reports of the surveys can also be called up in the instructor view (`instructor_show_report=1`). Each parameter must be added on a separate line. For detailed information on the available parameters, please consult the evasys LTI® manual.

- **LTI® Role mapping “Instructor”:**
Defines which Moodle roles should correspond to the LTI® role "Instructor" who will see the evasys block content as instructors.
- **LTI® Role mapping “Learner”:**
Defines which Moodle roles should correspond to the LTI® role "Learner" who will see the evasys block content as students.

Tip:

It is possible to show users the view for lecturers and at the same time the view for participants in surveys. This is useful if, for example, lecturers may also be participants in surveys.

In this case, please assign the role "Learner" also for trainers/lecturers.


| | |
|---|---|
| evasys LTI provider URL <small>block_onlinesurvey lti_url</small> | <input type="text"/> Default: Empty URL of the LTI provider PHP file on the evasys server (https://[SERVERNAME]/customer/lti/lti_provider.php). |
| evasys LTI password <small>block_onlinesurvey lti_password</small> | Click to enter text  Password of the evasys LTI interface. |
| evasys LTI Custom parameter <small>block_onlinesurvey lti_customparameters</small> | <div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div> Default: Empty Here the custom parameters are stored, which can be used to define settings for displaying the surveys, e.g. whether the student view should also display completed surveys (learner_show_completed_surveys=1) or whether the reports of the surveys can also be called up in the instructor view (instructor_show_report=1). Each parameter has to be added on a separate line. For detailed information on the available parameters, please consult the evasys LTI manual. |
| LTI Role mapping "Instructor" <small>block_onlinesurvey lti_instructormapping</small> | <div style="border: 1px solid #ccc; padding: 5px;"> Manager Course creator Teacher Non-editing teacher Student Guest Authenticated user Authenticated user on frontpage </div> Default: Teacher, Non-editing teacher Defines which Moodle roles should correspond to the LTI role "Instructor" who will see the evasys block content as instructors. |
| LTI Role mapping "Learner" <small>block_onlinesurvey lti_learnermapping</small> | <div style="border: 1px solid #ccc; padding: 5px;"> Manager Course creator Teacher Non-editing teacher Student Guest Authenticated user Authenticated user on frontpage </div> Default: Student Defines which Moodle roles should correspond to the LTI role "Learner" who will see the evasys block content as students. |

Figure 20: LTI® settings

In addition, you can configure **expert settings** of the block. These settings normally don't need any modification and are provided for special usage scenarios:

- **Debug mode:**

If activated, debugging and error messages are shown within the evasys block.

- **Additional CSS for iframe:**

Here, you can add CSS code which will be added to the page which is loaded in the evasys block. You can use this setting to re-style the evasys block content according to your needs.

Please note: This setting is used in compact mode for LTI and SOAP connections as well as in detailed mode for SOAP connections. It is not used in detailed mode for LTI connections - if you need to add custom styles in this mode, please change your LTI template in evasys.

- **LTI® - Learner regular expression:**

Regular expression which searches the content of the LTI®-Response for open online surveys. This only needs to be adjusted if customized templates have been created or modified in a way that the functions differ from the standard templates.

Please note: This setting is only processed if you selected "LTI" in the "Communication protocol" setting.

- **LTI® - Instructor regular expression:**

Regular expression which searches the content of the LTI®-response for open online surveys. This only needs to be adjusted if customized templates have been created or modified in a way that the functions differ from the standard templates.

Please note: This setting is only processed if you selected "LTI" in the "Communication protocol" setting.

| | |
|---|--|
| Debug mode block_onlinesurvey survey_debug | <input type="checkbox"/> Default: No If activated, debugging and error messages are shown within the evasys block. |
| Additional CSS for iframe block_onlinesurvey additionalcss | <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <p>Default: Empty</p> <p>Here, you can add CSS code which will be added to the page which is loaded in the evasys block. You can use this setting to re-style the evasys block content according to your needs. <i>Please note: This setting is used in compact mode for LTI and SOAP connections as well as in detailed mode for SOAP connections. It is not used in detailed mode for LTI connections - if you need to add custom styles in this mode, please change your LTI template in evasys.</i></p> |
| LTI - Learner regular expression block_onlinesurvey lti_regex_learner | <div style="border: 1px solid #ccc; padding: 5px;"> /<(p){1}(.){0,}[\s]{0,}(data-participated="false"){1}[\s]{0,}/ </div> <p>Default: /<(p){1}(.){0,}[\s]{0,}(data-participated="false"){1}[\s]{0,}/</p> <p>Regular expression which searches the content of the LTI-Response for open online surveys. This only needs to be adjusted if customized templates have been created or modified in a way that the functions differ from the standard templates. <i>Please note: This setting is only processed if you selected "LTI" in the "Communication protocol" setting.</i></p> |
| LTI - Instructor regular expression block_onlinesurvey lti_regex_instructor | <div style="border: 1px solid #ccc; padding: 5px;"> /<(div){1}[\s]{1,}(class=){1}["']{1}[a-z]{0,}[\s]{0,}(response-box){1}[\s]{0,}[a-z]{0,}[\s]{0,}["']{1} </div> <p>Default: /<(div){1}[\s]{1,}(class=){1}["']{1}[a-z]{0,}[\s]{0,}(response-box){1}[\s]{0,}[a-z]{0,}[\s]{0,}["']{1}/</p> <p>Regular expression which searches the content of the LTI-Response for open online surveys. This only needs to be adjusted if customized templates have been created or modified in a way that the functions differ from the standard templates. <i>Please note: This setting is only processed if you selected "LTI" in the "Communication protocol" setting.</i></p> |

Figure 21: Expert settings

As soon as all necessary settings have been made, please click on the **[Save changes]** button to continue and finish the configuration of the installed Moodle plugin.

4.2. Placing the block

The block is designed to be added to the Moodle homepage, to the Moodle Dashboard page or to individual Moodle course pages. Most likely, you will want to place it as Moodle administrator onto the standard Moodle Dashboard page or will inform your Moodle users that they can place the block onto their individual Dashboards if needed.

The steps to place the block are always the same and follow standard Moodle procedures: Enable editing mode by pushing the **[Turn editing on]** button (on the frontpage or on course pages) or **[Customize this page]** (on the Dashboard), open the *Add a block* menu and select the “Evaluations (evasys)” option.

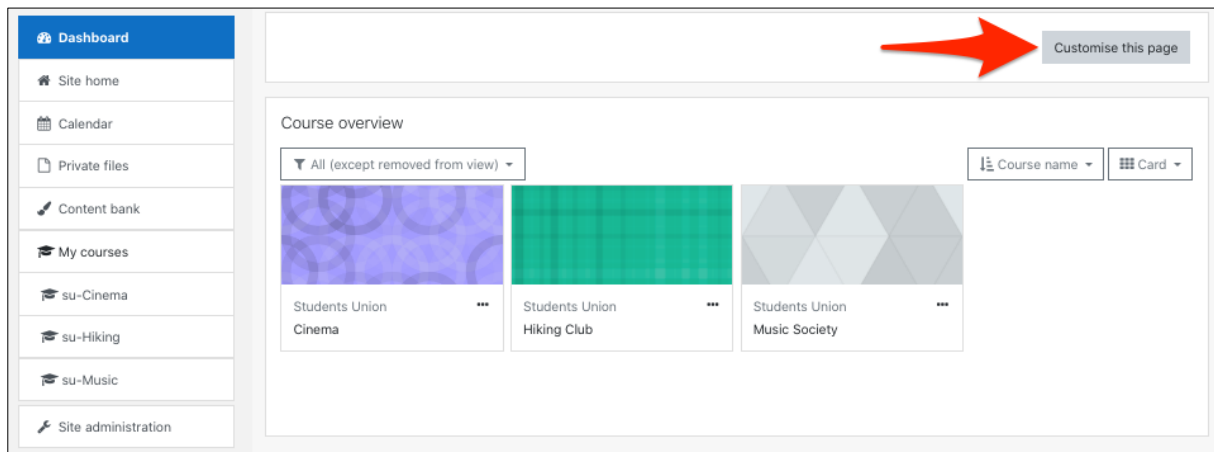


Figure 22: Turning editing on

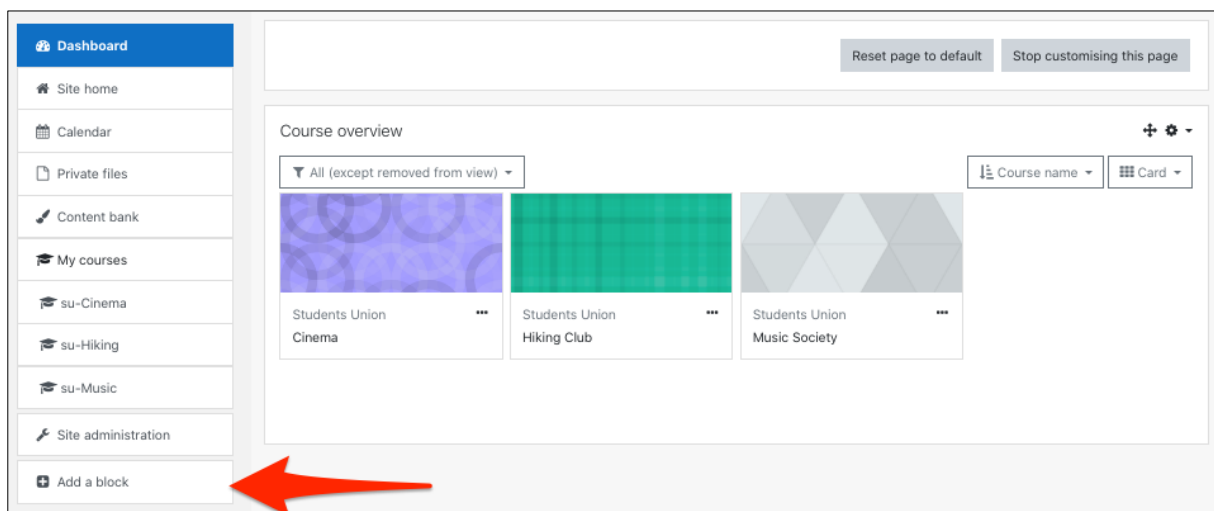


Figure 23: Adding a block

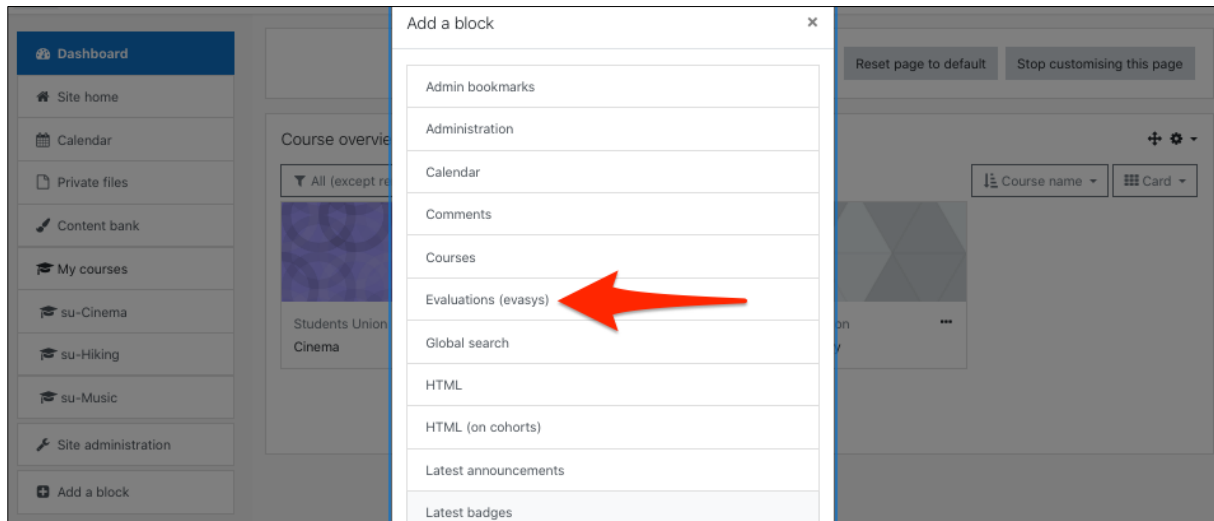


Figure 24: Adding a block

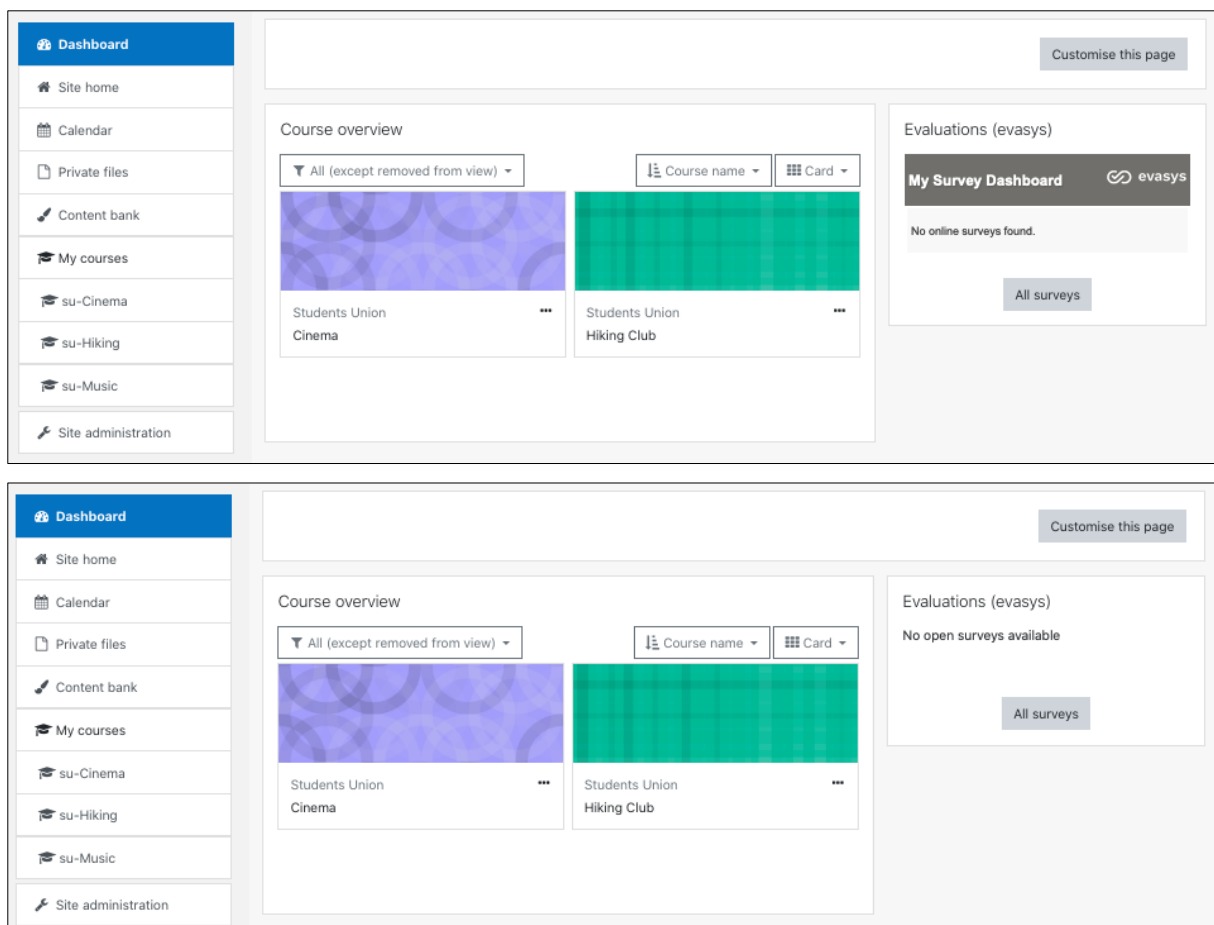


Figure 25: Block shown on the administrator's Dashboard (above LTI®, below SOAP)

4.3. Styling the block

By default, the evasys block is adapted as best as possible to the Moodle default theme *Boost*. However, depending on your local Moodle installation and Moodle theme, you might want to style the evasys block differently.

It's important to know that the content of the evasys block, i.e. the survey list in detailed mode and the survey counter in compact mode, are shown within an iframe. Thus, you might have to style the block and the iframe content separately.

To do this, you have these possibilities:

- **CSS classes within the block:**

As soon as there is an open survey, the evasys block gets the CSS class *block_onlinesurvey_surveyexist* in addition to the default class *block_onlinesurvey*. You can use this class to style the block in your local Moodle theme with custom CSS depending on the fact if there are open surveys or not.

Additionally, the block gets the CSS classes

block_onlinesurvey_surveycount_1, *block_onlinesurvey_surveycount_2*, *block_onlinesurvey_surveycount_3* or *block_onlinesurvey_surveycount_gt3*, which represent the number of open surveys (1 to 3 open surveys or more than 3 surveys). You can use these classes to style the block depending on the number of open surveys in your local Moodle theme with custom CSS.

- **CSS classes in the compact display mode:**

All CSS classes which were listed in the previous item are also available in the compact display mode within the iframe. Here, they are added to the *#block_onlinesurvey_area* element.

You can use these classes to style the compact display mode with additional CSS for the iframe (see next item).

- **Additional CSS for iframe:**

By using the setting Additional CSS for iframe which has already been mentioned during the installation of the plugin, you can add CSS code which will be added to the iframe. This approach is necessary as you can't style the iframe content with custom CSS in your local Moodle theme.

This setting is used in compact mode for LTI and SOAP connections as well as in detailed mode for SOAP connections. It is not used in detailed mode for LTI connections - if you need to add custom styles in this mode, please change your LTI template in evasys.

- **Height of the iframe:**

The height of the iframe is calculated based on the chosen display mode as well as the number of open surveys. If you want to overwrite these values in your local Moodle theme with custom CSS, you will find the CSS selectors and height values in *blocks/onlinesurvey/styles.css*.

5. evasys Block in Learner View

5.1. Connection via LTI®

When using the **LTI® interface**, the evasys Block uses the *LTI® Role mapping "Learner"* setting to check whether the Moodle user is a student or not. If the user has one of the configured roles in a Moodle course, the learner view will be presented to him / her in the block.

The learner view then provides the following functions:

Pop-up info

If activated, a pop-up window will appear after logging in. It informs students with the configured text that open online surveys are available. The message appears after each new login if open online surveys are available. If there are no more surveys for the student to participate in, the message will not be displayed any more.

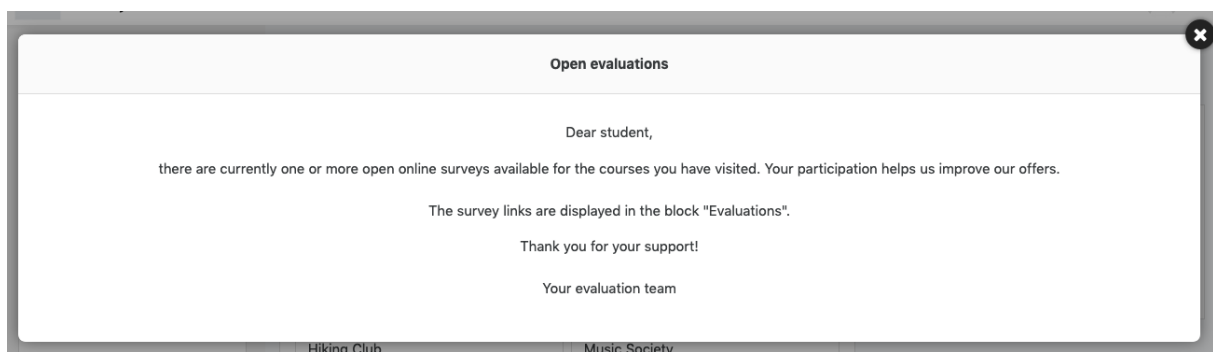


Figure 26: Pop-up info in student view

Compact mode

In compact mode, the evasys Block displays the number of open surveys by means of a graphic.

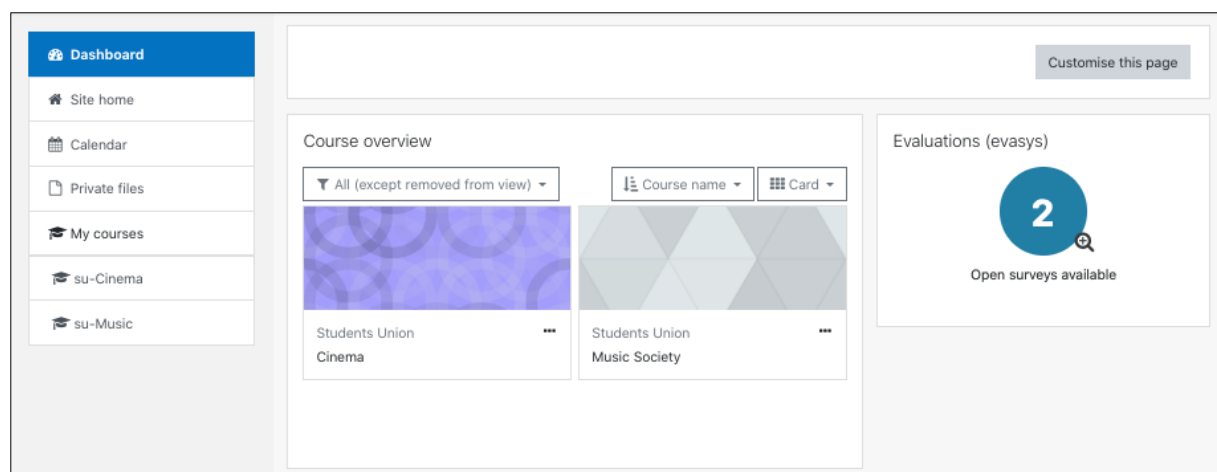


Figure 27: evasys Block with compact view showing available surveys

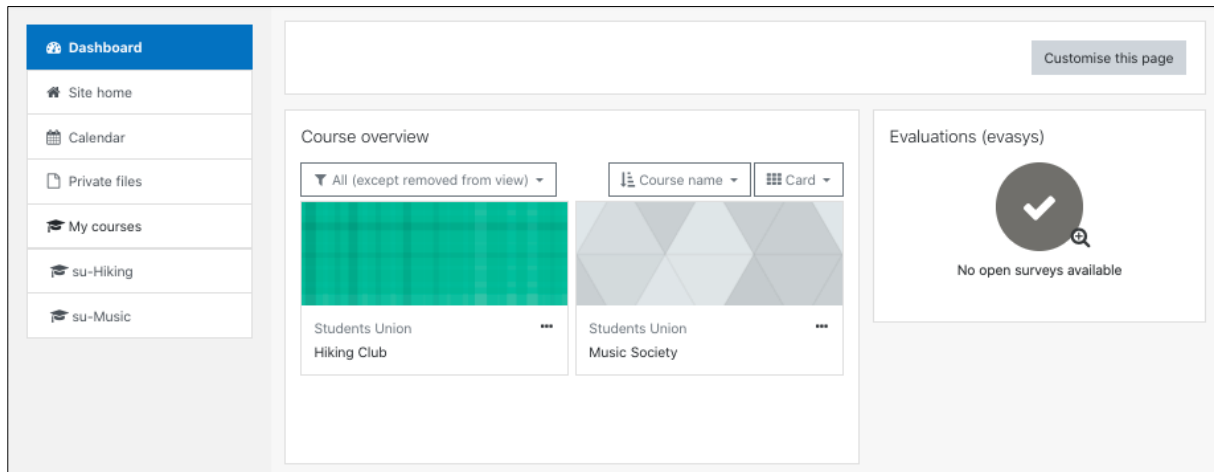


Figure 28: evasys Block with compact view without available surveys

Detailed mode

In detailed mode, the evasys Block displays the list of available surveys directly according to the LTI[®] template.

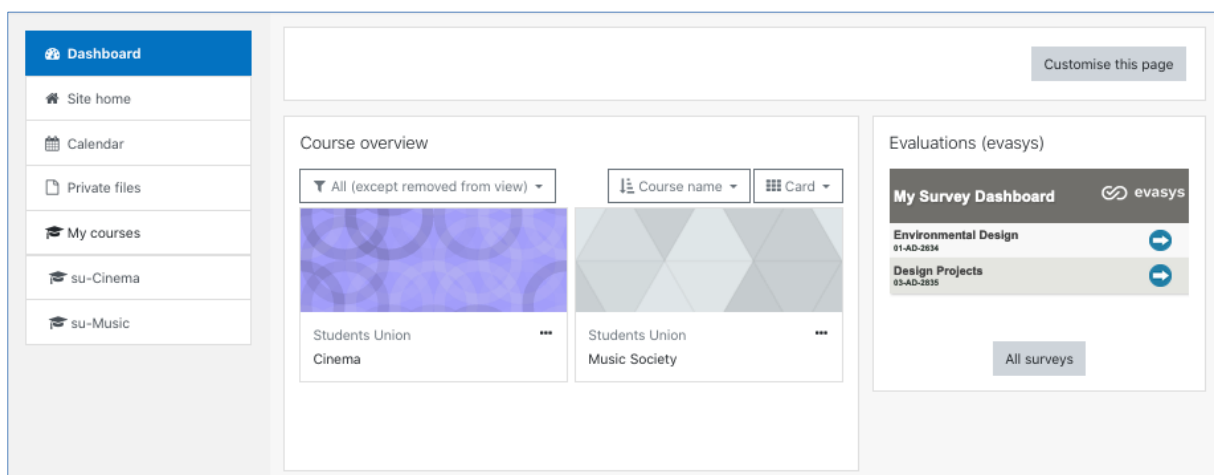


Figure 29: evasys Block with detailed view showing available surveys

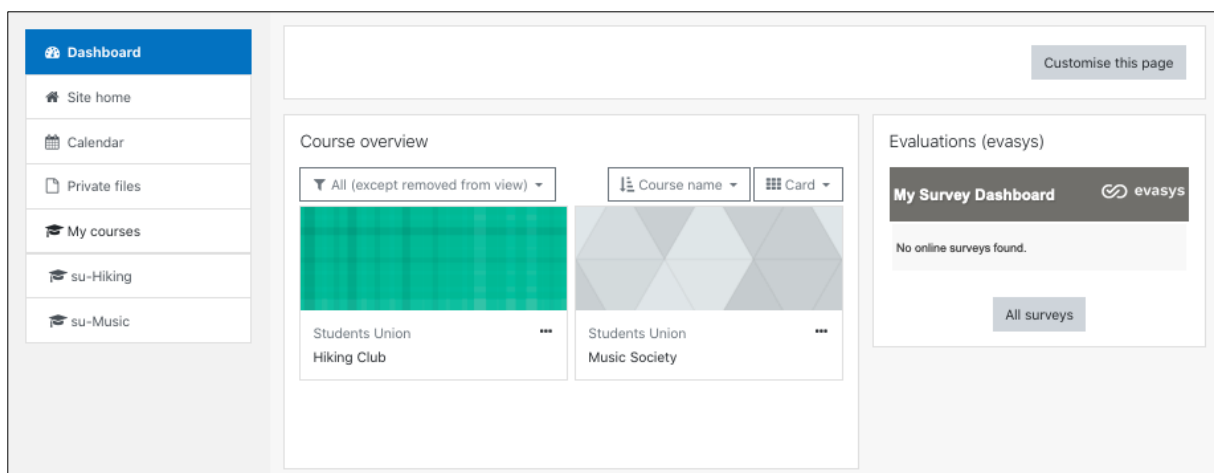


Figure 30: evasys Block with detailed view without available surveys

Enlarged list view

In compact mode, an enlarged list view can be opened by clicking on the graphic, in detailed mode the same can be done by clicking the button below the survey list.

If you disable the setting *Always offer enlarged list view* as administrator, the user will only be able to open the enlarged list view if he has at least one open survey.

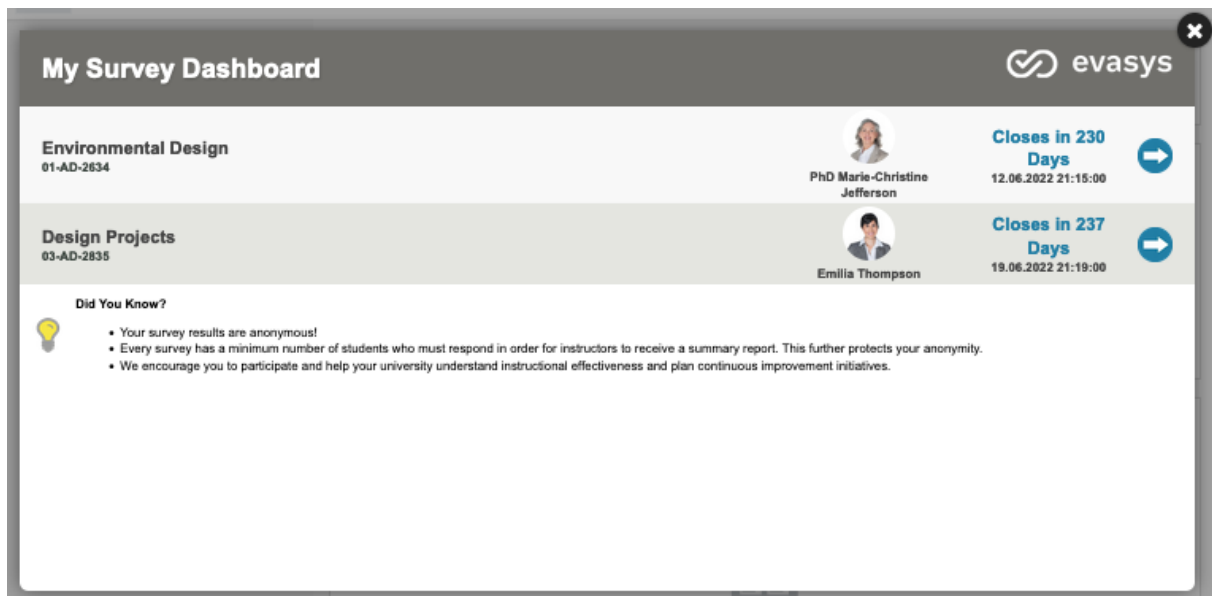


Figure 31: Enlarged list view of the evasys block

Survey list

The evasys block shows a list of current surveys for the time period defined by the LTI® parameter, e. g. for the current semester. Surveys which the student has not yet taken part in are always displayed at the top of the list.

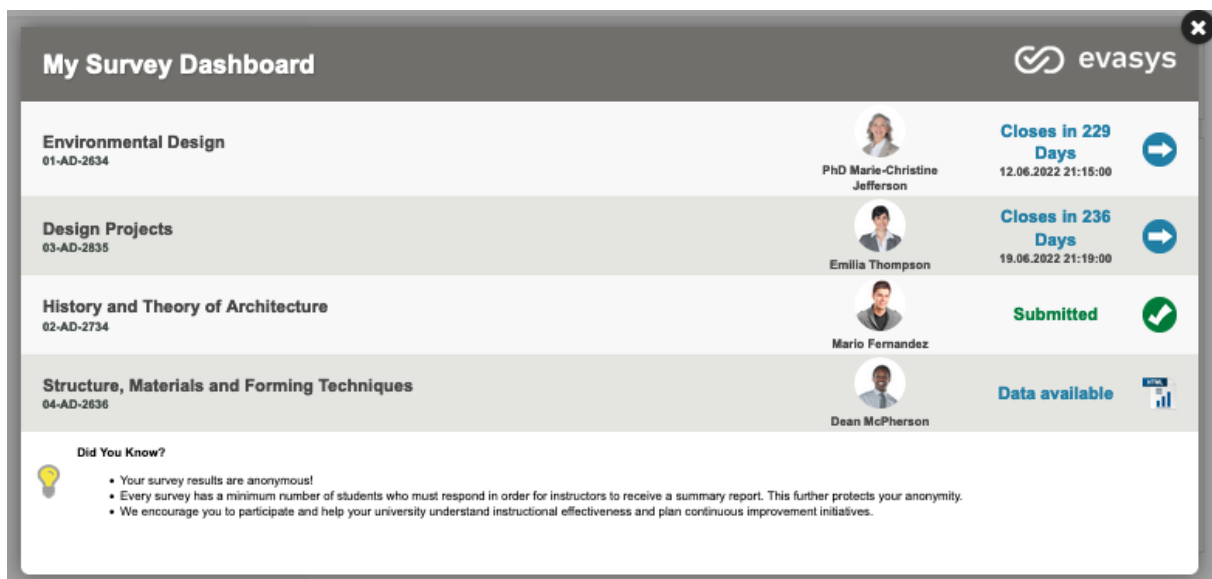


Figure 32: evasys block enlarged view

The example shows four courses which the student can evaluate. The first two surveys have not yet been completed. By clicking on the arrow, you can switch directly to the survey. Further authentication via PSWD is not necessary.

The third course has already been evaluated. The online questionnaire has already been sent to the participants. However, the survey has not yet been officially completed. In the LTI[®] template, a custom parameter has been used to define that surveys in which the student has already participated are still to be displayed.

In the fourth case, the LTI[®] template has been set up through a custom parameter to allow students to access the data once the survey has been completed. If you click on the HTML symbol, you will receive a HTML representation of the survey results in your browser.

The layout and the displayed contents of the LTI[®] template are freely configurable. The result view for participants can be activated or deactivated, for example. For more detailed information, please see chapter 7.

5.2. Connection via SOAP

When using **SOAP API**, the evasys Block is kept more simply. It is only available in the learner view and thus does not detect any Moodle user roles.

The learner view then provides the following functions:

Pop-up info

If activated, a pop-up window will appear after logging in. It informs students with the configured text that open online surveys are available. The message appears after each new login if open online surveys are available. If there are no more surveys for the student to participate in, the message will not be displayed any more.

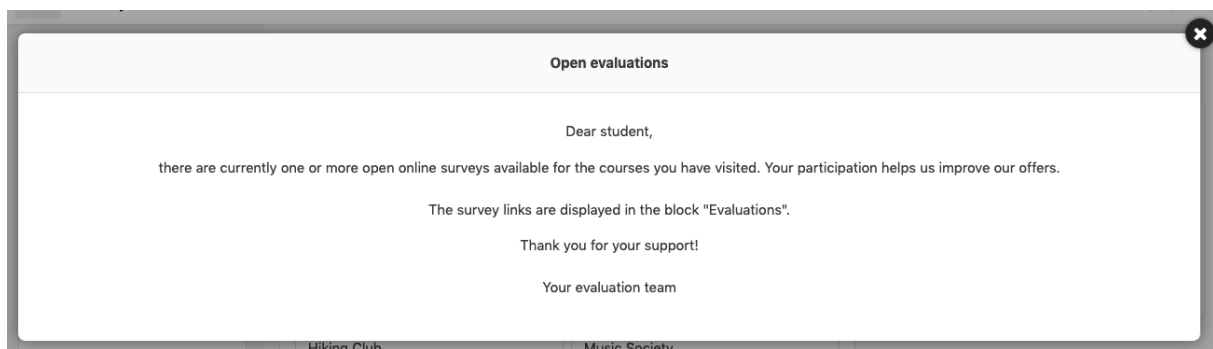


Figure 33: Pop-up info in student view

Compact mode

In compact mode, the evasys Block displays the number of open surveys by means of a graphic.

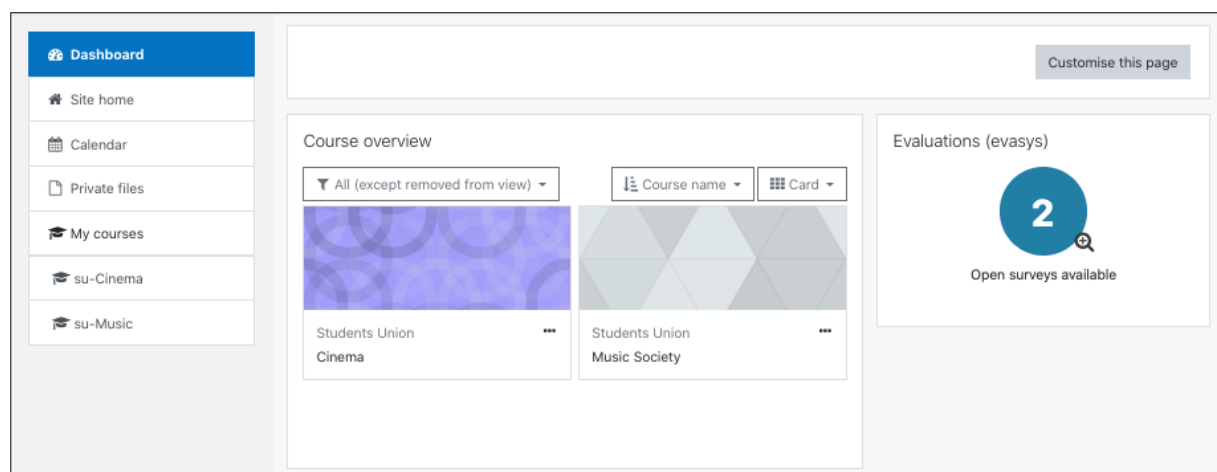


Figure 34: evasys Block with compact view showing available surveys

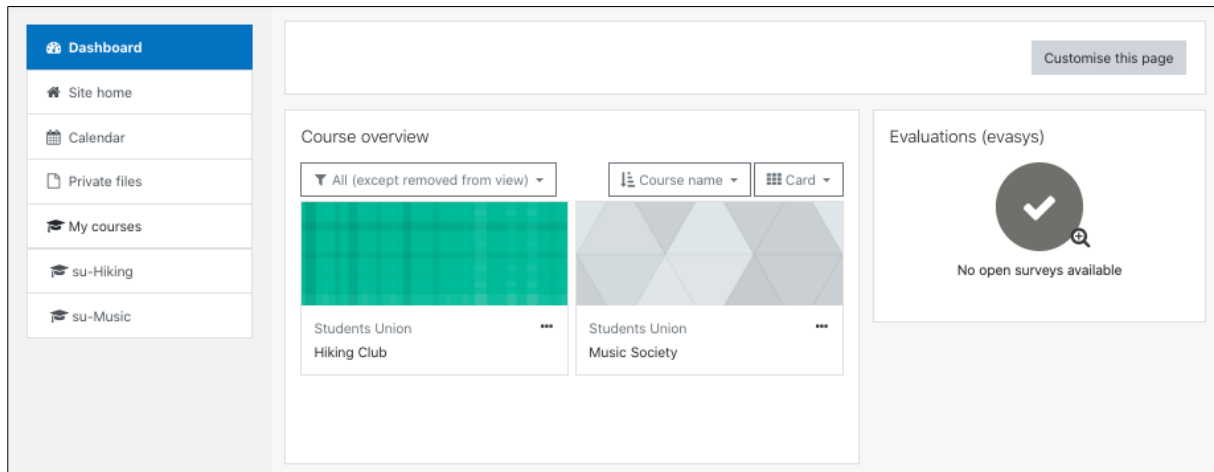


Figure 35: evasys Block with compact view without available surveys

Detailed mode

In detailed mode, the evasys Block displays the list of available surveys directly according to the LTI[®] template.

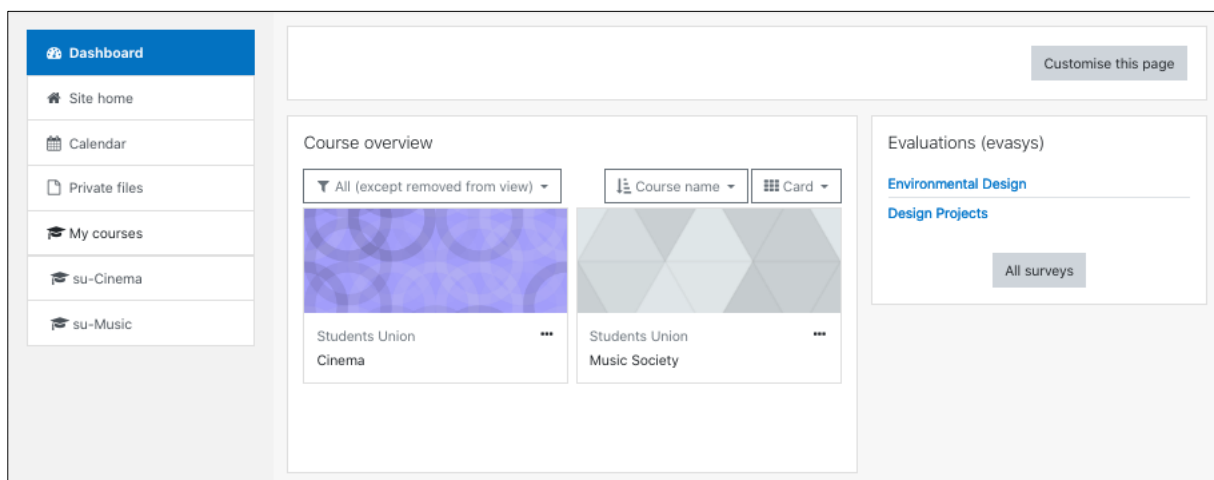


Figure 36: evasys Block with detailed view showing available surveys

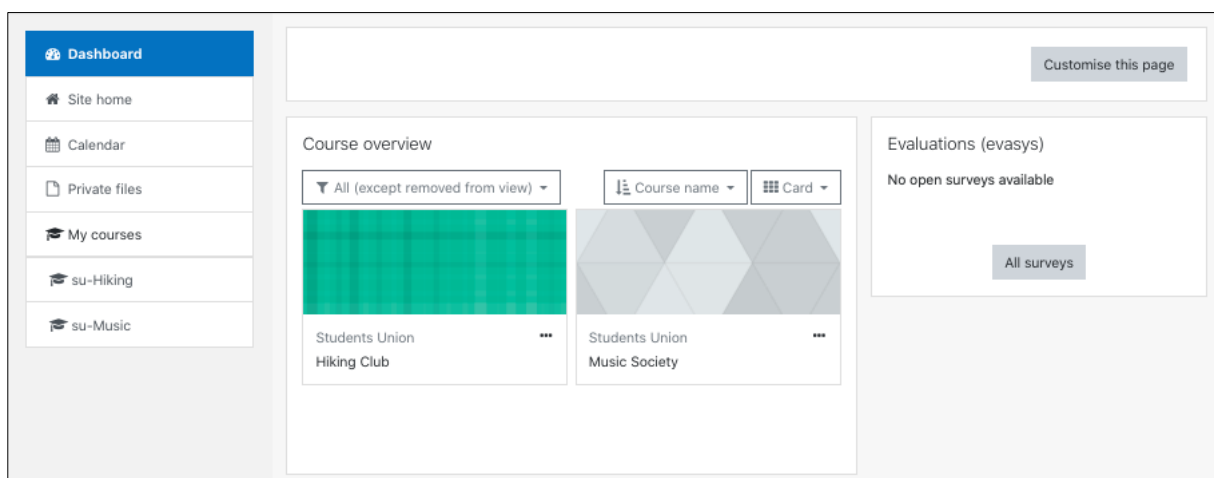


Figure 37: evasys Block with detailed view without available surveys

Enlarged list view

In compact mode, an enlarged list view can be opened by clicking on the graphic, in detailed mode the same can be done by clicking the button below the survey list.

If you disable the setting *Always offer enlarged list view* as administrator, the user will only be able to open the enlarged list view if he has at least one open survey.



Figure 38: Enlarged list view of the evasys block

6. evasys Block in Instructor View

6.1. Connection via LTI®

When using the **LTI® interface**, the evasys Block uses the *LTI® Role mapping "Instructor"* setting to check if the Moodle user is an instructor or not. If the user has one of the configured roles in a Moodle course, the instructor view will be presented to him / her in the block.

The instructor view is not fundamentally different to the learner view. Thus, only the differences to the learner view are described here:

Pop-up info

Instructors won't get any pop-up info after logging in, even if this pop-up info is activated in the evasys Block plugin settings.

Survey list

The evasys block shows a list of current surveys for the time period defined by the LTI® parameter, e. g. for the current semester.

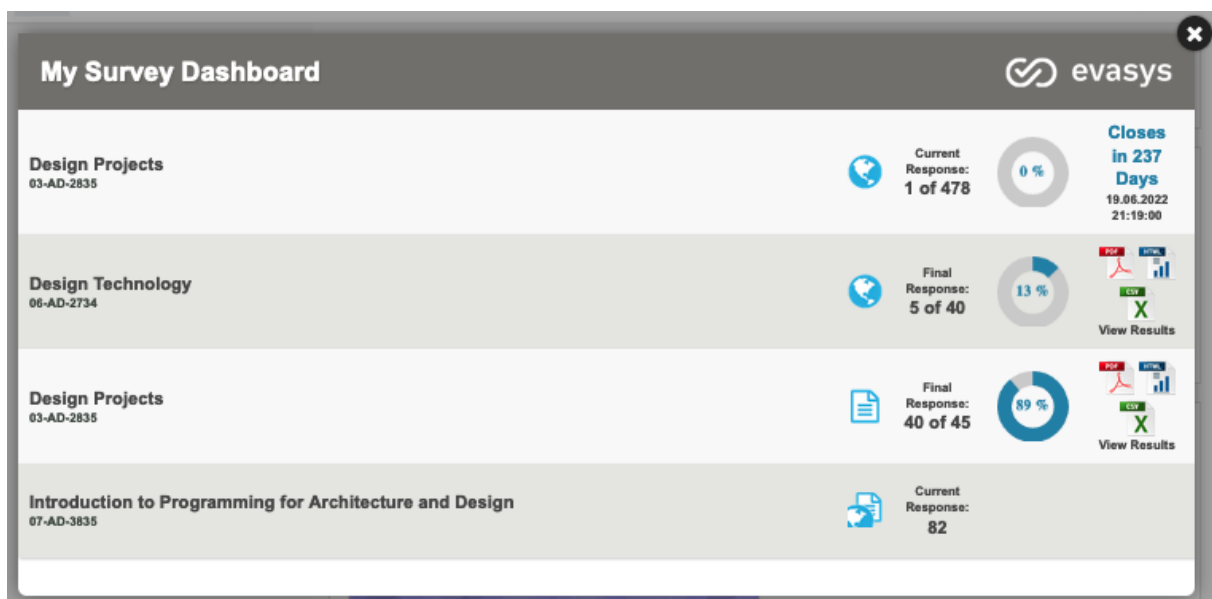


Figure 39: evasys block enlarged view

In the example above you can see four courses of a lecturer. Depending on how the LTI® template is configured, different information can be made available.

The first example is an online survey which has already been completed. The final response is displayed, and the evaluation can be downloaded in PDF format or in the form of CSV raw data.

The second event is an open online survey. The currently available response rate is displayed, as well as information about when the survey ends.

The third example is a paper-based survey which has already been completed. The final response is displayed, and the evaluation can be downloaded in PDF format or in the form of CSV raw data.

The fourth example shows a hybrid survey which is still open. Only the current response is displayed.

The layout as well as the displayed contents of the LTI® template can be freely configured. The download of the evaluations can be activated or deactivated, for example. For more detailed information, please see chapter 7.

6.2. Connection via SOAP

When using **SOAP API**, the evasys Block is kept more simply. It is only available in the learner view and thus does not detect any Moodle user roles.

Instructors will only see these surveys in the evasys Block which they participate in on their own.

7. Special LMS Parameters

You can add special parameters directly in your LMS. These parameters are divided into two types:

7.1. Parameters for Students/Learners

- `order_by_survey_close_date`
- `learner_survey_types`
- `learner_show_completed_surveys`
- `learner_load_instructor_images`
- `learner_lms_identifier`
- `learner_provider_identifier`

7.2. Parameters for Instructors/Teachers

- `order_by_survey_close_date`
- `instructor_survey_types`
- `instructor_show_past_surveys_for_n_previous_periods`
- `instructor_survey_data_access_for_n_previous_periods`
- `instructor_show_report`
- `instructor_show_export`
- `instructor_plugin_response`
- `instructor_lms_identifier`

7.3. Special parameters for Students/Learners

`order_by_survey_close_date = 0 oder 1`

Defines whether the surveys are sorted alphabetically (0) or by end date in student and faculty view

`learner_survey_types =` separated by pipe characters "o" , "h" (e.g. "o|h" for online and hybrid surveys)

Defines which types of surveys are displayed: "o" stands for "online surveys", "h" stands for hybrid surveys.

Default value: o|h

`learner_show_completed_surveys = 0 oder 1`

Defines whether only open surveys are displayed for the learner/student (0) or also completed ones (1)

Default value: 0 (open surveys sonly)

`learner_load_instructor_images = 0 oder 1`

Defines the possibility to display the instructor/teacher image from evasys in the placeholder `INSTRUCTOR_IMAGE`, `SECONDARY_INSTRUCTOR_IMAGES` (1) sets the placeholder `LOAD_INSTRUCTOR_IMAGE`

Default value: (0)

`learner_lms_identifizier` = Beliebiger Parameter aus der LTI Abfrage (z.B. „ext_user_username“)

Defines which parameter is to be used as user ID instead of the e-mail address from the LTI query: Use parameters if the participant's e-mail address in evasys is different from the e-mail address in the LMS.

Default value= " " (The e-mail address is taken as ID)

`learner_provider_identifizier` = „custom1“, „custom2“, „custom3“

Defines which participant additional field in evasys should be used for the participant ID instead of the e-mail address (for example, if the LMS user name should be used as ID instead of the e-mail, this value must also be imported via an additional field)

Default value= " " (The e-mail address is taken as ID)

Special parameters für den Instructor/Teacher

`instructor_survey_types` = "o", "h", "p" separated by pipe characters (e.g. "o|h" for online and hybrid surveys)

Defines which types of surveys are displayed: "o" stands for "online surveys", "h" stands for hybrid surveys, "p" for paper-based surveys

Default value: o|h|p

`instructor_show_report` = 0 or 1

Defines whether PDF reports from the survey list can be opened in the lecturer/teacher view.

Default value = 0 (no report access)

Attention: If this function is activated, this can possibly increase the load of the evasys server and influence the performance.

`instructor_show_export`= 0 or 1

Defines whether raw data for closed surveys can be opened from the survey list in the lecturer/teacher view.

Default value = 0 (no export access)

Attention: If this function is activated, this can possibly increase the load of the evasys server and influence the performance.

`instructor_show_past_surveys_for_n_previous_periods` = 0 to X

Defines whether only surveys of the current period are displayed (0), or whether previous periods are also displayed.

Default value = 0 (only current period is displayed) "X" specifies the number of previous periods (X is a positive integer)

`instructor_survey_data_access_for_n_previous_periods` = 0 bis X

Defines whether information about the surveys is only displayed for the current period (0), or whether previous periods are also displayed.


Default value = 0 (only current period is displayed) "X" indicates the number of previous periods (X is a positive integer)

order_by_survey_close_date = 0 or 1

Defines whether the surveys are sorted alphabetically (0) or by completion time (1) in participant and instructor view.

instructor_plugin_response = [Plug-in Name) (z.B. BringYourOwnDevice)

Defines whether the survey list in the instructor view should be replaced by a plug-in. All plug-ins that are available for the Lecturer/Teacher User Role in evasys can be displayed in the LMS. The lecturer will be logged in automatically and the lecturer's default interface will be replaced by the one of the stored plug-in. In the example below you can see the plug-in "Bring your own device" displayed in Moodle:



Environmental Design

Home > Env. Design > 28 August - 3 September

NAVIGATION

- Home
- Dashboard
- Site pages
- Current course
 - Design Tech
 - Participants
 - Badges
 - General
 - 21 August - 27 August
 - 28 August - 3 September
 - Bring Your Own Device**
 - 4 September - 10 September
 - 11 September - 17 September
 - 18 September - 24 September
 - 25 September - 1 October
 - 2 October - 6 October

Bring Your Own Device

Following surveys are available.
Use the blue arrow icon to get a full-screen display showing the link to this survey as QR code and tiny URL.

| Survey | Period | Creation date | |
|--|----------|---------------|---|
| Firewalls and Access Control Lists | Summer18 | 2018-04-05 | ➔ |
| Interior Design | Summer18 | 2018-04-05 | ➔ |
| Managing and Maintaining a Healthy Lifestyle | Summer18 | 2018-04-05 | ➔ |
| Psychology 101 | Summer18 | 2018-04-05 | ➔ |
| Security Essentials | Summer18 | 2018-04-05 | ➔ |
| Windows Server 2005-Yukon | Summer18 | 2018-04-05 | ➔ |

Figure 13: Plug-in in Moodle

8. How to Connect Surveys between evasys and Moodle

The link between student Moodle users and an evasys online survey is either achieved by using the student's email address or by an evasys custom field which must contain the name of the Moodle user (see chapter 4 "Installation in Moodle").

After the students have logged in to Moodle, the email address or username is transferred to evasys. Evasys checks whether there are open online surveys for courses in which the email address or username of the student has been imported as a participant.

For this reason, it is necessary to import participants' data into evasys before generating online surveys.

Participants data can be imported using a simple CSV file format. If the **email address is used as an identifier** the CSV format only must include the course ID followed by an email address for each line.

Example:

- MA05Wiw2; person01@localserver.com
- MA05Wiw2; person02@localserver.com
- MA05Wiw2; person03@localserver.com
- MA05Con; person01@localserver.com
- MA05Con; person03@localserver.com
- MA05Con; person04@localserver.com

This example shows two courses with three and four participants each. Some of the participants are attending both courses, some only one of both.

If the username is used as an identifier, the CSV format must also contain the Moodle user name. This is imported into one of the first three possible custom fields. Further information such as first and last name, title etc. can be imported, if desired. For more detailed information on the file format, please refer to the evasys User Guide.

Example:

```
MA05Wiw2;person01@example.com;;;;;person01_User_name
MA05Wiw2;person02@example.com;;;;; person02_User_name
MA05Wiw2;person03@example.com;;;;; person03_User_name
MA05Con;person01@example.com;;;;; person01_User_name
MA05Con;person03@example.com;;;;; person03_User_name
MA05Con;person04@example.com;;;;; person04_User_name
```

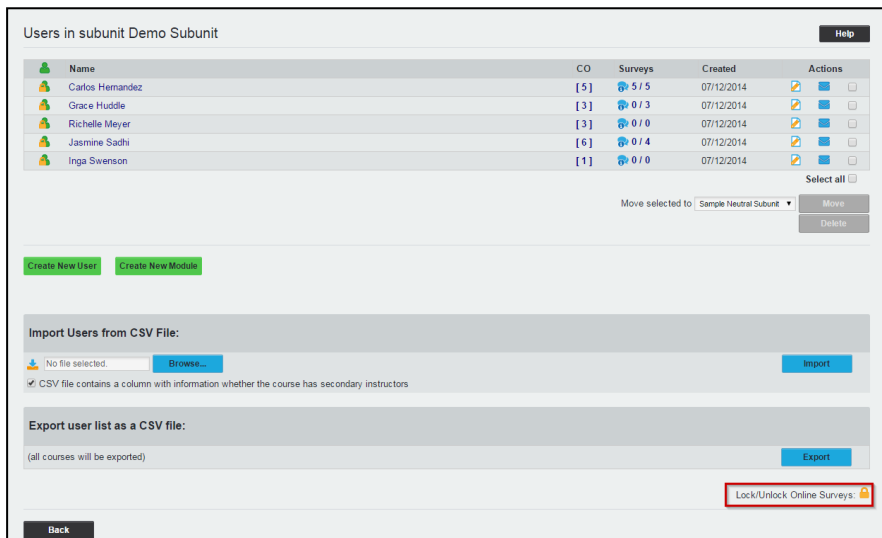
Please note: If you import further information such as the user name via a custom field in addition to the course ID and the email address, the related course is automatically treated as non-anonymous which means that the raw data of the surveys will later allow you to assign the record to the participant.

If you want to avoid this, create a "dummy" course in your evasys system, which is used exclusively to record all student participant data. If you import the email addresses of the participants for the "real" courses, the system checks in the background when communicating with Moodle whether there are any surveys for the username which belongs to this email address. The courses remain anonymous.

Before importing the participants' data into evasys you first have to setup the subunits, instructors and courses. It is essential that the course IDs set for the courses match those being used in the participant import file since they serve as a reference.

Please refer to chapter B 2.2.3 of the evasys User Guide for more information about the participants' data import process.

Existing online surveys will not be visible in Moodle if they are set to "closed". You can lock or unlock each survey individually or for a whole subunit. This helps you to control the visibility of available online surveys in the Moodle portal.



| Name | CO | Surveys | Created | Actions |
|------------------|-------|---------|------------|----------------------------|
| Carlos Hernandez | [5] | 5 / 5 | 07/12/2014 | [Lock/Unlock] [Delete] |
| Grace Huddle | [3] | 0 / 3 | 07/12/2014 | [Lock/Unlock] [Delete] |
| Richelle Meyer | [3] | 0 / 0 | 07/12/2014 | [Lock/Unlock] [Delete] |
| Jasmine Sadi | [6] | 0 / 4 | 07/12/2014 | [Lock/Unlock] [Delete] |
| Inga Swenson | [1] | 0 / 0 | 07/12/2014 | [Lock/Unlock] [Delete] |

Buttons: Create New User, Create New Module, Import Users from CSV File, Export user list as a CSV file, Lock/Unlock Online Surveys, Back.

Figure 40: Lock / Unlock surveys in evasys

Alternatively, the duration of the survey can be defined by using the function „time-controlled surveys“.

In case of configured scheduled tasks, the survey will not be displayed in Moodle before the survey start date and after the survey end date.

Please refer to chapter B 3.10 of the User Administrator Guide for more information about the scheduled tasks.

9. Notes on Contacting Support

In order to be able to trace the problem efficiently, support needs various log files from the servers involved in the integration. When contacting evasys support please take the following steps and provide the log files listed below:

- Enable “Debug mode” on the evasys server (please refer to the evasys Administrator manual for details)
- Enable “Debug mode” in the evasys block settings
- Perform a test run with a student account for which online surveys are available
- Make notes (screenshot if possible) regarding date and time of your test run and the error message displayed
- Disable “Debug mode” on the evasys server and in the evasys block

The following log files should be provided when contacting evasys support:

| File name | Default location |
|----------------|-------------------------------------|
| access.log | C:\inetpub\wwwroot\evasys\data\logs |
| Soapserver.log | C:\inetpub\wwwroot\evasys\data\logs |

If you need assistance in setting up and configuring the plug-in in Moodle, or if you are interested in a custom development for the plug-in, the Moodle partner lern.link can offer you a corresponding service. In case of interest, please go to <https://lern.link> or contact team@lernlink.de directly.