

Forum

A great way of maintaining the social aspect of learning is to set up activities which require participants to collaborate and have online discussions. The forum module is an activity where learners and trainers can exchange ideas by posting comments. There are four basic forum types. Forum posts can be graded by the trainer or other learners.

Forum types

- **A single simple discussion:** A single topic, all on one page. Useful for short, focused discussions.
- **Standard forum for general use:** An open forum where anyone can start a new topic at any time. This is the best general-purpose forum.
- **Each person posts one discussion:** Each person can post exactly one new discussion topic (to which everyone can respond). This is useful when you want each learner to start a discussion about, say, their reflections on the week's topic, and everyone else responds to these.
- **Q & A Forum:** The Q & A forum requires learners to post their perspectives before viewing other learners' postings. After the initial posting, learners can view and respond to those of others. This feature allows equal initial posting opportunity among all learners.

Forum capabilities

Forum capabilities are more fine-grained than any other module, giving you the ability to create a wide range of roles:

- **View discussions:** The basic capability allows a user to view forum discussions but not reply or start new ones.
- **View hidden timed posts:** This allows a user to set a display start and end date for new discussions. Timed posts need to be enabled by your system administrator in order to make use of this capability.
- **Start new discussions:** This allows a user to create a new discussion if the forum allows multiple discussions.
- **Reply to posts:** This allows a user to reply to posts within a discussion. You'll probably want to override this capability, as well as the capability to start new discussions, for an archive forum.
- **Add news:** A user with this capability can post news to the course news forum. By default, only trainers can add news.
- **Reply to news:** This allows a user to reply to news postings in the news forum. By default, only trainers can reply to news postings.
- **View ratings:** This allows a user to view his own forum ratings.
- **View any ratings:** This allows a user to see forum ratings of other users.
- **Rate posts:** This allows a user to rate forum posts if rating is allowed in the forum. By default, only trainers can rate forum posts.
- **Create attachments:** This allows a user to attach a file to their forum post.
- **Delete own posts (within deadline):** This allows a user to delete their own forum posts within a certain time, usually 30 minutes.
- **Delete any posts (anytime):** This allows a user to delete any forum post at any time.
- **Split discussions:** This allows a user to split discussions to create new discussions. By default, only trainers can split discussions.
- **Move discussions:** A user with this capability can move discussions to other forums in the course.
- **Edit any post:** This very powerful capability allows a user to edit any forum post at any time. By default, only trainers can edit any post.
- **Always see Q & A posts:** This allows a user to view Q & A forum posts without first posting.
- **View subscribers:** This allows a user to view the list of subscribers to a forum.
- **Manage subscriptions:** This allows a user to edit and delete forum subscriptions.
- **Initial subscription:** This allows a user to be subscribed initially to forums. By default, all roles have this capability, apart from administrators and course creators, so they don't receive a lot of forum subscription emails.
- **Throttling applies:** This allows a user to be blocked from posting in a forum, according to the blocking options in the forum.

Creating a Forum

To add a forum to your course page

1. Click **Turn editing on**.
2. Select 'Forum' from the **Add an activity...** dropdown menu.
3. Enter a forum name, this appears on the course page for learners.
4. Select the forum type you want to use.
5. Write a descriptive forum introduction.
6. Customise the available settings, see [Forum Setting](#) to learn more.
7. Click **Save and display** (or **Save and return to course**).

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Forum Settings

General settings

Force everyone to be subscribed?: If you select **Yes**, everyone in your course will automatically receive emails of new posts. Otherwise, people can choose whether to subscribe. We recommend **Initially** as this lets learners know there is a forum in progress (as your initial message will go to learners), however they have the option to switch it off.

Read tracking for this forum?: Read tracking highlights unread forum posts.

Maximum attachment size: When learners attach files to their posts, you'll want to limit the maximum size of their posts so you don't use up all your server space. This is especially important if you are paying a commercial hosting company for your Totara site.

Subscription mode

When a user is subscribed to a forum it means that they will receive a notification (via popup and/or email, depending on the user's messaging settings preferences) of each new posting. By default, posts are recorded about 30 minutes after the post was first written. Depending upon the email settings of each forum member, they may be sent an email immediately after the 30 minute edit window is closed, or in a batch at a time fixed by the site administrator.

People can usually choose whether or not they want to be subscribed to each forum. However, the trainer can choose to force subscription on a particular forum, in which all course users will be subscribed automatically, even those that enrol at a later time.

There are four subscription mode options:

- **Optional subscription:** Participants can choose whether to be subscribed.
- **Forced subscription:** Everyone is subscribed and cannot unsubscribe.
- **Auto subscription:** Everyone is subscribed initially but can choose to unsubscribe at any time.
- **Subscription disabled:** Subscriptions are not allowed.

The subscription mode and subscribe or unsubscribe links appear in *Navigation > Forum administration* when viewing the forum. Trainers can quickly change the mode via the **Subscription mode** options and view the current subscribers via the **Show/edit current subscribers** link.



- Forcing everyone to subscribe is especially useful in the news forum and in forums towards the beginning of the course (before everyone has worked out that they can subscribe to these emails themselves).
- Changing the setting from **Yes, initially** to **No** will not unsubscribe existing users; it will only affect those who enrol in the course in the future. Similarly, changing **Yes, initially** will not subscribe existing course users but only those enrolling later.
- There is also a **Subscriptions not allowed** setting which prevents Learners from subscribing to a Forum, Trainers may choose to subscribe to a forum if they wish.

Read tracking for this forum?

Read tracking for a forum allows users to track read and unread forum posts.

There are three options for this setting:

- **Optional:** Learners can turn tracking on or off for the forum via a link **Track / Don't track unread posts** in *Administration > Forum administration*, or via their profile **Forum Tracking** option.
- **Off:** It is not possible to track unread forum posts.
- **Forced:** Tracking is always on in this forum, regardless of user preference or setting. No link is present in *Administration > Forum administration*. This setting is only available when the **Allow forced read tracking** administrative setting is enabled.

Grade settings

Allow posts to be rated: Forum posts can be rated using either a numerical scale or a scale made up of words. By default, only trainers can rate forum posts, though you can use a role override to allow learners to rate each others' posts. This is a useful tool for giving learners participation grades. Any ratings given in the forum are recorded in the gradebook.

Grade: If you allow posts to be rated, you can choose a scale rating using the Grade dropdown menu. You can create your own scale, or the default **Separate and Connected ways of knowing** scale or a number between 1 and 100. The points you choose are the total for the entire forum.

Restrict ratings to posts with dates in this range: You can allow only posts within a certain date range to be rated. This is useful if you want to keep learners focused on the most recent content.

Post Threshold for Blocking

Time period for blocking: Allows you to block learners posting after a given number of posts in a given period, after a certain number of posts learners can be warned that they are close to the limit.

Post threshold for blocking: Sets the threshold for blocking. Setting block threshold to 0 disables blocking. If blocking is disabled, warnings are automatically disabled.

Post threshold for warning: Sets the threshold for warnings. Setting the warning threshold to 0 prevents learners being warned that they are near the limit.



None of these settings affect trainers posting.

Common module settings

See [Common Module Settings](#) to learn more.

Activity completion

See [Activity Completion](#) to learn more.

Restrict access

See [Restrict Access](#) to learn more.

Searching Forums

All of the forums within a course are searchable and browsable. Performing a forum search can find useful information easily. All forums within the course are searched simultaneously.

The **Search Forums** block can be added to your course page and enables you to quickly search for a particular word within a forum post.

For advanced searching, press the search button without typing anything in the words field, you will see a complete form that makes it easier to do advanced searches.

An advanced search enables you to refine your search in any/all of the following ways:

- **These words can appear anywhere in the post:** One or more words you type in here will be found in all the places in the post they appear.
- **This exact phrase must appear in the post:** You must enter the exact phrase you are searching for.
- **These words should not be included:** Identifying words you don't want can help narrow down the resulting list of messages.
- **These words should appear as whole words:** The search engine will return posts that contain your words as part of a larger word. For example, if searching for 'cat', posts with the word 'catalog' will be returned. Selecting whole words will look for a space before and after the words you have entered.
- **Posts must be newer/older than this:** This narrows down the number of posts according to time limits.
- **Choose which forums to search:** This enables searching within one forum only.
- **These words should be in the subject:** If you know the subject line of the posts you want, you can limit your searches by the subject line.
- **This name should match the author:** If you only want posts from certain authors, enter their names here.

Forum posting

The default content of **Subject** is usually 'Re: <the name of the parent post>'. You can change it though.

When writing text in Totara there are several formats you can choose to produce your text, depending on your expertise and the type of browser you are using.

Sharing images through forums

When an image is attached as a file to a forum message, it is immediately displayed full size after the message (i.e. no need to click on an attachment). This an excellent way of sharing images without having to go through the process of uploading them as files and linking them from within web pages.

Images may be dragged and dropped into the box as well as uploading via the **add** link and the [File picker](#).

Sharing sound and video through forums

If multimedia filters are enabled, a sound file (mp3) or accepted video file can be attached and it will be embedded into the forum post in an appropriate player.

As with images in the previous section, multimedia files may be dragged and dropped from the desktop instead of uploaded via the [File picker](#).

Post length

Extra long posts cause problems when doing a forum search and can be difficult to read on screen. Rather than creating a very long post, consider copying and pasting the text into a text file and add it as an attachment to your forum post.

Post editing time limit

There is a time limit for editing posts, usually 30 minutes. It is set by an administrator in *Administration > Security > Site policies*.

Mail now

A mail now checkbox is available for anyone with the capability to manage course activities, normally teachers and admins.

Checking the **Mail now** box results in a notification being sent immediately (i.e. when the cron next runs) to everyone subscribed to the forum, rather than after the post editing time limit.



For users who have enabled email digests in their profile, the notification is not sent separately from other forum post notifications.

Reply to posts via email

If enabled by an administrator (in Incoming mail configuration), you can reply to forum posts via email.

1. Click the **Reply by email** link in the email.
 - a. You will see a special unique email address to send your reply to.
2. Reply using the email address provided.



IMPORTANT: Make sure you remove the original email content so that your forum post does not contain the quoted text.

3. You should receive an email saying your reply has been successfully posted.
4. Your post now appears in the forum.

Moving between forum threads

Links top and bottom left and right (where applicable) take you to the previous and next forum discussion in a list.



If your forum has groups, you only need to post once and your post is copied for each group.

Adding and editing subscribers

You can manually add or remove people as subscribers to a forum in Totara Learn. Subscribers will get an email update (controlled by their digest settings) when a new post is made. To add a new subscriber, follow these steps:

1. Select **Show/edit current subscribers** from the **Forum administration** block.

2. Select **Turn editing on**.
3. Search for the user(s) you want to add in the search field under the potential subscriber selection list.
4. Choose the user(s) and select **Add**.

Archiving forums

When forum threads get very long, you may want to archive them and start up the conversation again with a good summary. Discussions can be archived one by one or by backing up the complete forum with user data, then restoring it.

To archive a discussion:

1. Create a forum named 'Archive forum' on your course page.
2. Go to the forum containing the discussions you want to archive.
3. Enter the discussion by clicking on the discussion name. At the top-right corner of the screen, you'll see a dropdown menu labelled **Move this discussion to**.
4. Select **Archive forum** from the list.
5. You'll now see the discussion in the archive forum. Click the **Forums** link in the navigation bar and select the original forum from the list.
6. Post a summary of the archived discussion in the original forum to restart the discussion.

Using an archive forum allows you to keep the discussions manageable, while retaining all of the detail of the original. It's also an easy way to move good discussions from class to class or semester to semester.

Managing discussions is also easier with some help. A number of studies have reported the benefits of assigning groups of trainees to moderate duties for discussions around given topics. If a group of trainees knows that they are responsible for being able to discuss an issue intelligently with their classmates, they are much more likely to be sure they've done the reading and really understand the topic. They can be responsible for moving the conversation along, answering basic questions, and archiving and summarising a discussion.

To create learner moderator groups, assign a small team of learners to each forum or discussion. Be sure to enable ratings for everyone, in order to allow the learner group to use ratings.