

Using common roles

Roles allow you to easily assign sets of permissions and capabilities to the various users on your site. On this page you can find out more about the differences between the default roles, how to assign each role, and how to amend role permissions.

Main roles

Site Managers can do just about everything, except some of the site and server administration tasks. As with Site Administrators, they do not typically participate in courses.

Course Creators can create and manage courses, enrol learners and edit course settings. This role would normally be applied at category level to allow the role holder to add new courses to that category (and any sub-categories).

Editing Trainers can do almost anything within a course, including adding or changing the activities and grading Learners.

Users are not assigned the role of Editing Trainer throughout the site by default, but are instead assigned (enrolled) as an Editing Trainer to a each course as required, one at a time. Editing Trainers can only make changes in the courses they have been enrolled in.

By default, Editing Trainers can also assign the Trainer role and/or the Learner role to other users.

Trainers are those who are responsible for delivering training to learners, but whom you do not wish to have the ability to alter activities. This role is able to do many of the same things as an Editing Trainer, except only in a view capacity (without editing and making changes).

A **Staff Manager** is a role that allows those assigned it the ability to access the learning records of staff as well access and approval for staff performance management, learning plans, and seminar attendance. If you wish to assign a manager to a user this should be done via their job assignment. By associating a manager with a user's job assignment, you are assigning them Staff Manager rights at the user/that user's context. You can see more about how to do this on the [Managing job assignments](#) help page.

The **Learner** role allows the user to access course learning resources, including the ability to view their own grades. They can participate in course activities (such as forums and assignments) but cannot grade or edit activities on the course (by default).

Here you can see a comparison of the default capabilities for each role:

Course Creator	Editing Trainer permissions	Trainer permissions	Staff Manager	Learner
Create and manage courses	Create and manage courses	View courses	View records of staff in their team	View courses
Create and manage course activities	Create and manage course activities	View course activities	View and approve performance management (e.g. appraisals, 360 feedback, learning plans)	View course activities
	Manage grades	View and add grades for course activities	Manage team members' personal and company goals	Complete course activities
	Administer course settings backup/restore	Award course badges	Approve seminar attendance requests	View own grades
	Administer course badges	View course activity logs	Mark program progress	
	View course activity logs	View course blocks		
	Add course blocks			

Guest

The **Guest** role is useful when you do not wish to set up an account for someone or make your course publicly accessible, however, you do want to allow one or more people to view course materials. When guest access is enabled for a course, then anyone who logs in as a guest can access any viewable content but they will not be able to participate in the course (for example they can't post in a forum or complete a questionnaire).

You can enable guest access on your course by following these steps:

Go to course you wish to enable access on.

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

Alongside the **Guest access**, click the eye icon to enable.

If you don't see **Guest access** in the table then you might first have to select it from the **Add method** dropdown list.

You can access setting by clicking on the cog icon, although there are only two settings:

Setting	Description	Notes
Allow guest access	This enables or disables guest access just like the eye icon.	-
Password	You can enter a password so that only guest users you give this to can access you course.	-

If you decide to make any adjustments to the settings then you will need to remember to click the **Save changes** button when you are done.

Assigning roles

Assigning the Site Manager role

To add a new Site Manager you will need to be logged in as either a Site Administrator or a Site Manager.

1. From the **Administration menu** go to *Users > Permissions > Assign system roles*.
2. Click the link for **Site manager** in the table titled **Please choose a role to assign**.
3. Use the **Potential users** pane to find users, although if you have a lot of users you will need to use the **Search** box underneath it to find specific users.
4. Select the user so they are highlighted and then click the **Add** button.
5. This will make them appear in the **Existing users** pane, as long as they appear here you have successfully added them.

Once you have added all the Site Managers you want to then you can simply navigate away from the page, there is no button to save. You can also remove users by repeating the steps above but selecting the user in the **Existing users** pane and then clicking the **Remove** button.

Assigning the Course Creator role

1. As a Site Manager or Site Administrator, go to the category you want to add the Course Creator to.
2. Then go to *Administration > Category > Assign roles*.
3. Click the **Enrol users** button at the top right or bottom left of the page.
4. From the **Assign roles** dropdown choose the **Course creator** role.
5. Select enrolment options as appropriate.
6. Browse or search for the user.
7. Click the **Enrol** button opposite the user. The user will indent in the list and the enrol button will disappear, indicating that the user is enrolled.
8. When you have finished, click the **Finish enrolling users** button.

The user will then appear in the list of enrolled users and will no longer be available in the search list.

For more information on manually enrolling Course Creators, see [Manual enrolment](#).

Assigning Editing Trainer and Trainer roles

To enrol an Editing Trainer or Trainer you will need to have appropriate permissions. Roles with the correct permissions by default are Site Manager, Site Administrator, and Editing Trainer. Once you have one of these roles you can follow the steps below:

1. Go to **Course administration > Users > Enrolled users**.
2. Click the **Enrol users** button at the top right or bottom left of the page.
3. From the **Assign roles** dropdown choose the **Editing trainer** or **Trainer** role.
4. Select enrolment options as appropriate.
5. Browse or search for the user.
6. Click the **Enrol** button opposite the user. The user will indent in the list and the enrol button will disappear, indicating that the user is enrolled.
7. When you have finished, click the **Finish enrolling users** button.

The user will then appear in the list of enrolled users and will no longer be available in the search list.

For more information on manually enrolling Editing Trainers and other enrolment method see the [Enrolment Help](#) page.



You might wonder if it is possible to add an Editing Trainer/Trainer or Learner to a role at site level. This is possible, but it is not best practice.

Editing Trainers/Trainers and Learners typically work in one or more individual courses. It is unusual for a Learner to be studying every single course on your Totara and unusual for an Editing Trainer/Trainer to be training in every single course. The Site Manager role might be one that makes sense to assign on a system or category context. Rather than assigning an existing role to the system content, it is advisable to create a new role based on the Editing Trainer/Trainer or Learner role and assign this in the system context. Then assign individuals to that role.

You can see more about creating and assigning site-level access on the [Roles Help](#) page.

Assigning the Editing Trainer role at category or site level

If you wish to give the Editing Trainer role to one or more users across a category you will need to enable the role at the right context. To do this, follow these steps:

1. From the **Site administration menu** navigate to *Permissions > Define roles*
2. You will see **Manage roles** with a list of user roles, locate the **Editing Trainer** role.
3. To the right of the Editing Trainer description, click on the edit icon (.
4. From the **Editing role 'Editing Trainer'** page find the **Role archetype** section near the top.
5. Under **Context types where this role may be assigned** check whichever apply.
6. Once you are done, scroll to the bottom of the page and click **Save changes**.

It is worth noting that by default, the Editing Trainer role is enabled at **Course** level which is what allows you to enrol an Editing Trainer to a specific course. If you also tick the box for **Category**, a user can be enrolled with all the permissions of an Editing Trainer at category level, giving them access (and permissions) to any course contained in the specific category.

After the role has been enabled for the correct context you can then assign it to specific users at that level. To assign an Editing Trainer to a category, follow these steps:

1. Navigate to the desired category
2. From the **Category administration** block click on **Assign roles**.
3. Click on the **Editing Trainer** role.
4. You can now use the **Potential users** list and search to look for your desired users.
5. When you have found a user click their name to highlight it then click the **Add** button.
6. Make sure the user now appears in the **Existing users** list, if they do you can simply navigate away from the page (there is no save button).

If you want to give only some Editing Trainers these privileges, you may want to create another Editing Trainer role that gives those permissions only to those trusted Editing Trainers who have been assigned that role.

Assigning the Staff Manager role

To add a new Staff Manager you will need to be logged in as either a Site Administrator or a Site Manager.

1. From the **Administration** menu go to *Users > Permissions > Assign system roles*.
2. Click the link for **Staff manager** in the table titled **Please choose a role to assign**.
3. Use the **Potential users** pane to find users, although if you have a lot of users you will need to use the **Search** box underneath it to find specific users.
4. Select the user so they are highlighted and then click the **Add** button.
5. This will make them appear in the **Existing users** pane, as long as they appear here you have successfully added them.

Once you have added all the Staff Managers you want to then you can simply navigate away from the page, there is no button to save. You can also remove users by repeating the steps above but selecting the user in the **Existing users** pane and then clicking the **Remove** button.

Assigning learners manually

If you wish to use the manual enrolment method to add a user as a Learner on a course then follow the steps below. You can also go to the [Enrolments Help](#) page to see other enrolment methods, including self-enrolment and automatic enrolment methods.

1. As a Site Manager or Site Administrator, go to *Course administration > Users > Enrolled users* from the **Administration** block.
2. Click the **Enrol users** button at the top right or bottom left of the page.
3. From the **Assign roles** dropdown choose the **Learner** role.
4. Select enrolment options as appropriate.
5. Browse or search for the user.
6. Click the **Enrol** button opposite the user. The user will indent in the list and the enrol button will disappear, indicating that the user is enrolled.
7. When you have finished, click the **Finish enrolling users** button.

The user will then appear in the list of enrolled users and will no longer be available in the search list.

Enrol users



Assign roles

Learner

Browse users Browse audiences

Enrolment options

Search

	Addison Learner demo2.user@totallearning.com	Enrol
	Sam Learner demo.user@totara.com	Enrol
	Ariel Molton nmail@nomail.com	Enrol
	Iain Napier mike86ball@gmail.com	Enrol
	Bob Sherunkel bob.sherunkle@a.com	Enrol
	D. G. G. G.	

Finish enrolling users

Changing role permissions

If you really need to change a default role, follow these steps:

From the **Site administration menu** go to *Permissions > Define roles*.

You will see **Manage roles** with a list of user roles, locate the role you wish to change.

To the right of the role description, click on the edit icon ().

From the **Editing role** page you can change what users with that assigned role can or cannot do by checking or unchecking the **Allow** check boxes under capability/permission.

Be careful what you allow each role to do whilst you are adjusting the role's permissions/capabilities. Consider the security vulnerabilities of giving that role an inappropriate permission. Only give the roles permissions that are necessary or appropriate. To the right of many of the **Allow** check boxes are coloured triangles that notify you of possible security warnings for each choice. Use those warnings to help you decide which permissions you will or won't give to your roles.



If you need to modify a role significantly, it is advisable to create a new role rather than editing the default role.