

Reserve and Allocate Permissions

When a Manager is linked to a staff member they are automatically assigned the **Staff manager** role at the User context. This provides them permissions and capabilities (access rights) to manage their staff member's learning. However, by default, this role doesn't provide them access to the courses in which the learners are enrolled or to edit/manage any of the activities that sit within the course.

This means, in order for Staff managers to reserve and allocate spaces for their team in courses containing seminar activities, a Site Administrator must provide them specific access.

Depending on the requirements of your organisation, you may want to assign these access rights to one, many, or all Managers within one, many or all courses within the LMS.

Assigning all staff managers access to reserve and allocate

To give all Staff managers the ability to reserve and allocate spaces within a seminar activity, you will need to edit the Staff manager role (access rights) so the required permissions/capabilities can be added.

On this page



The Totara Academy has a whole course dedicated to using [Seminar Management](#) in Totara Learn. Here you can learn more on how to use seminars, see best practice, and give it a go yourself.



You will still need to assign these Staff managers access to the relevant course(s).

1. Within the **Administration** block navigate to *Site administration > Users > Permissions > Define Roles* click on the corresponding **Edit** icon (cog) against the **Staff Manager** role.
2. Under **Context types where this role may be assigned** select **Course**.

Editing role 'Staff Manager'

Short name: staffmanager

Custom full name:

Custom description:

Role archetype: ARCHETYPE: Staff Manager

Context types where this role may be assigned:

- System
- User
- Category
- Program
- Course
- Activity module
- Block

3. Under the **Capability** list find or search for **Reserve or allocate spaces for team members** (facetoface:reservespace) and **View seminar activities and events** (facetoface:view). You may also want all **Staff Managers** to be able to **Reserve of behalf of other managers** (facetoface:reserveother).

Filter: view seminar

Capability: Permission

Activity: Seminar	Permission
View seminar activities and events mod/facetoface:view	Allow Default: Not set
View seminar declared interest report mod/facetoface:viewinterestreport	Allow

4. Ensure the **Allow permission** has been checked for these items.

Capability: Permission Risks

Activity: Seminar	Permission	Risks
Manage reservations for an event mod/facetoface:managerevents	Allow	
Reserve on behalf of other managers mod/facetoface:reserveother	Allow	
Reserve or allocate spaces for team members mod/facetoface:reservespace	Allow	

5. Click **Save changes** to update the Staff Manager role or **Cancel** to discard your changes.

Assigning selected users access to reserve and allocate

To give one or selected users the ability to reserve and allocate spaces within a Seminar Activity, you will need to create a new Role (access right) which provides the required permissions/capabilities and assign the relevant users this role.

1. Within the **Administration** block navigate to *Site administration > Users > Permissions > Define Roles*, click on **Add a new role**.
2. Select **No role** under **Use role or archetype** and click **Continue**.

3. Enter a unique **Shortname** and **Custom fullname** in the boxes provided. (e.g. Reserving and Allocating Manager).
4. Under **Context types** check **System**, **Category**, and **Course**.
5. In the **Capability** list check **Allow** for **Reserve or allocate spaces for team members** (facetoface:reservespace), **View seminar activities and events** (facetoface:view), and (optionally) **Reserve of behalf of other managers** (facetoface:reserveother).
6. Click **Create this role** or **Cancel** to discard your changes.



You will still need to assign these users access to the relevant course(s).

You will also need to assign this new role to the selected users at either the System, Category or Course context (Please see [Roles](#) for information on assigning access rights)

Assigning all staff managers access to all courses

To provide Staff Managers access to all courses, you will need to provide them the ability to View courses without participation within the Staff Manager Role.

1. Within the **Administration** block navigate to *Site administration > Users > Permissions > Define Roles*, click on the corresponding **Edit** icon (cog) against the **Staff Manager** role.
2. In the **Capability** list check **Allow** against **View courses without participation** (course:view).
3. Click **Save changes**.

The screenshot shows the 'Define Roles' page in Moodle. The 'Capability' list is visible, and the 'View courses without participation' (course:view) capability is checked under the 'Staff Manager' role. The 'Permission' column shows 'Allow' for this capability. There are 'Save changes' and 'Cancel' buttons at the bottom.

Assigning all staff managers access to selected courses

To provide Staff Managers access to selected courses, you will need to assign them Staff Manager access to each course. The fastest way to do this is via Audience enrolment. Audience Sync will need to be enabled as an enrolment plugin via the Site administration area to be available with each course.

1. Under the **Administration** block, navigate to *Site Administration > Users > Audiences > Add New Audience*.
2. Create a new **Dynamic Audience** called 'Staff Managers' with the rule **Has direct reports = 'Yes'**.
3. Click the **Assigned Roles** tab.

The screenshot shows the 'Assign Roles' page for a Dynamic Audience. The 'Assigned Roles' tab is selected. A table lists roles that can be assigned to this audience:

Select all/none	Role	Context
<input type="checkbox"/>	Site Manager	System
<input type="checkbox"/>	Course creator	System
<input checked="" type="checkbox"/>	Staff Manager	System

4. Check the **Staff Manager** role.
5. Navigate to the relevant course.
6. Within the **Administration** block go to *Course administration > Users > Enrolled users > Enrolment methods*.
7. If not already listed, select **Audience Sync** from the **Add method** dropdown list.

Enrollment methods

Name	Users	Up/Down	Edit
Manual enrollments	4	↓	✖ ⚙
Guest access	0	↑ ↓	✖ ⚙
Self enrollment (Learner)	0	↑ ↓	✖ ⚙
Program	0	↑	⚙

Add method:

8. Choose **Staff Managers** from the **Audience** dropdown list.

There are required fields in this form marked *.

▼ Audience sync

Custom instance name

Active

Audience*

Assign role

Add to group

9. Choose **Staff Manager** from the **Assign role** dropdown list.
10. Select **Add method**.
11. Audience Sync will be added as an available Enrolment Method within this course and you will be prompted to enrol an existing Audience.

Assigning selected users access to all courses

To provide selected users access to all courses, you will need to provide them the ability to **View courses without participation** within the 'Reserving and Allocating Manager' Role (or as named as above).

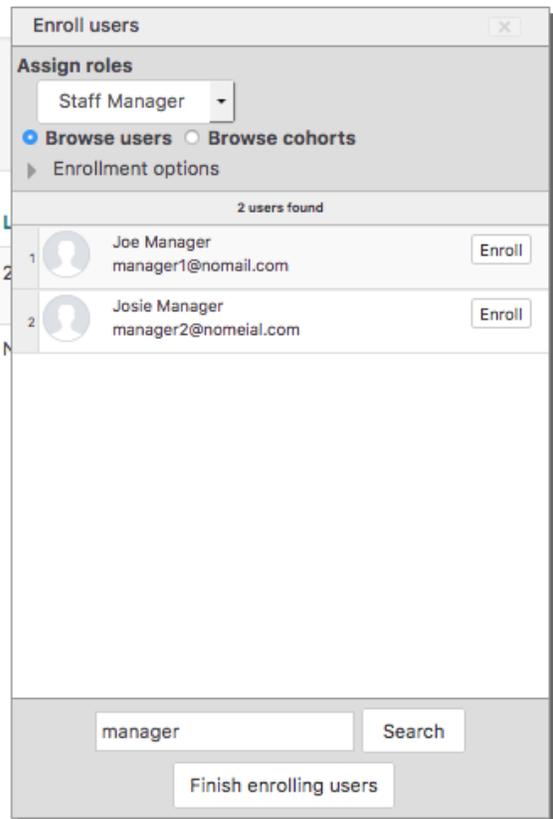
1. Within the **Administration** block navigate to *Site administration > Users > Permissions > Define Roles*, click on the corresponding **Edit** icon (cog) against the **Reserving and Allocating Manager** role.
2. In the **Capability** list check **Allow** against **View courses without participation** (course:view).
3. Click **Save changes**.

Assigning specific users access to selected courses

To provide specific users access to selected courses, you will need to manually assign them a role within each course with the required Capabilities such as Staff Manager.

1. Within the **Administration** block go to *Course administration > Users > Enrolled users* and click on **Enrol users**.

2. Choose the required role from the **Assign Roles** in the dropdown menu.



3. Search for the relevant user(s) and click **Enrol** user for each user.
4. When all users have been enrolled, select **Finish enrolling users**.

Enrolled users

Search [] Enrollment methods [All] Role [All] Group [All opt] Status [All] Filter [] Reset [] Enroll users []

First name / Last name / Email address	Last access to course	Role	Group	Enrollment methods
Aine Learner jane@nomail.com	2 days 18 hours	Learner x		Manual enrollments from Monday, September 26, 2016, 2:59 PM x
Jack Learner jack@nomail.com	Never	Learner x		Manual enrollments from Monday, September 26, 2016, 2:09 PM x
Joe Manager manager@nomail.com	Never	Staff Manager x		Manual enrollments from Monday, October 3, 2016, 12:56 PM x
Josie Manager manager2@nomail.com	Never	Staff Manager x		Manual enrollments from Monday, October 3, 2016, 12:56 PM x

Enroll users []