

How to Guide – Seminar Manager Approval, Reserve and Allocate

The Seminar (Face2Face) activity has an option for ‘Manager Approval’ on sign up and an option for Managers to be able to Reserve and/or Allocate places for their team members.

IMPORTANT NOTE: In order to use these features, the Site Administrator first needs to provide the specific access within the role permissions for the Staff Manager role. (See Appendix 1)

When the course page is created, and the Seminar activity added the required activity settings should be selected:

Approval Options:

▼ Approval Options

Require approval by ⓘ

No Approval

Learner accepts terms and conditions

By checking the box you confirm that permission to sign up to this seminar activity has been granted by your manager.

Falsely claiming that approval has been granted can result in non-admittance and disciplinary action.

Manager Approval

Manager and Administrative approval

Manager reservations Options:

▼ Manager reservations

Allow manager reservations ⓘ

Maximum reservations ⓘ

Automatically cancel reservations

Reservation cancellation days ⓘ

Reservation deadline ⓘ

Manager Approval

If selecting ‘Manager Approval’, when a user signs up to an event an email will be sent to their assigned Manager for ‘Approval’ to be ‘granted or ‘denied’. The Learner will also receive an email and see a message on screen as follows:

Your request was sent to your manager for approval.

You will be notified about their decision.

The default email wording content to the learner and manager will be:

Learner:

Mon 01/04/2019 11:41
noreply@learningnexus.co.uk
Seminar booking request: First Aid Training, 9:30 AM-4:30 PM, 1 May 2019

To: Bev Hares

Your request to book into the following course has been sent to your manager:

Participant: Duncan Johnson
Course: First Aid Training
Seminar: First Aid Training
Cost: 0

Date(s) and location(s):

1 May 2019, 9:30 AM - 1 May 2019, 4:30 PM Europe/London
Duration: 7 hours
Room:
Building: [session:room:cf_building]
Location: [session:room:cf_location]

This request will expire on 1 May, 09:30

Manager:

Mon 01/04/2019 11:41
noreply@learningnexus.co.uk
Seminar booking request: First Aid Training, 9:30 AM-4:30 PM, 1 May 2019

To: Bev Hares

This is to advise that Duncan Johnson has requested to be booked into the following course, and you are listed as their Team Leader / Manager.

Please follow the link below to approve the request:
<https://showcase.nexuscomply.co.uk/mod/face2face/attendees.php?s=145&action=approvalrequired>

Your request to book into the following course has been sent to your manager:

Participant: Duncan Johnson
Course: First Aid Training
Seminar: First Aid Training
Cost: 0

Date(s) and location(s):

1 May 2019, 9:30 AM - 1 May 2019, 4:30 PM Europe/London
Duration: 7 hours
Room:
Building: [session:room:cf_building]
Location: [session:room:cf_location]

This request will expire on 1 May, 09:30

The Manager can follow the link in the email to either 'Approve' or 'Decline' the request:

Approval required

Name	Time Requested	Manager's Name	Decide Later	Decline	Approve
Duncan Johnson	1 April 2019, 11:41 AM	Barry Green	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Update requests

Go back

Following 'Approval' the learner will receive an email with confirmation that they are now booked on the event.

If the Manager 'Declines' the request, then the learner will receive an email informing that their request has been declined.

The wording for any of these emails can be amended in the 'Language Customisation' for the site.

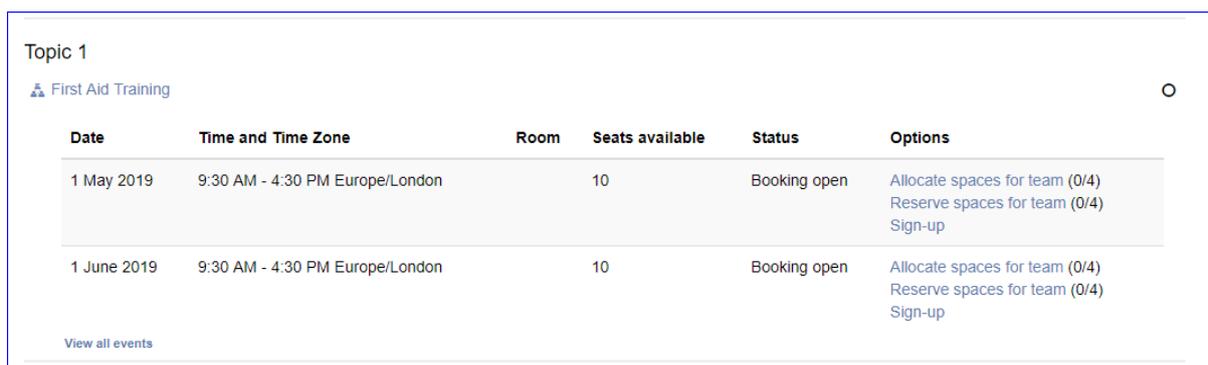
Manager reserve and Allocate

If a Manager is to be able to Reserve and allocate seats on Face to Face events and also be able to sign themselves up, then they need to be enrolled on the course as a 'Staff Manager' in order to sign up their staff but as 'Learner' in order to participate themselves.

Site Managers will need to create a 'Dynamic' audience for all users who have 'Direct Reports' and enrol this audience with the 'Staff Manager' role to the required courses where Managers are required/able to reserve and/or allocate spaces to their team members. OR the individual managers should be enrolled onto the course/s with the 'Staff Manager' role.

PLEASE NOTE: Managers will see these courses listed in their 'Record of Learning'

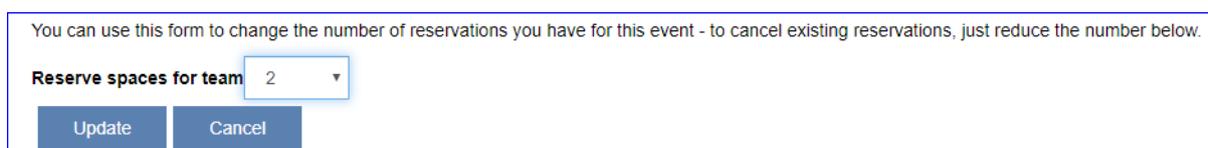
To reserve a space/s the Manager should go to the event on the course page and select the 'Reserve spaces for team' option:



The screenshot shows a table of events for 'Topic 1' under 'First Aid Training'. The table has columns for Date, Time and Time Zone, Room, Seats available, Status, and Options. Two events are listed, both for 1 May 2019 and 1 June 2019, with 10 seats available and 'Booking open' status. The options for each event are 'Allocate spaces for team (0/4)', 'Reserve spaces for team (0/4)', and 'Sign-up'. A 'View all events' link is at the bottom left.

Date	Time and Time Zone	Room	Seats available	Status	Options
1 May 2019	9:30 AM - 4:30 PM Europe/London		10	Booking open	Allocate spaces for team (0/4) Reserve spaces for team (0/4) Sign-up
1 June 2019	9:30 AM - 4:30 PM Europe/London		10	Booking open	Allocate spaces for team (0/4) Reserve spaces for team (0/4) Sign-up

In the 'Reserve spaces for team' drop down they then need to select the number of spaces they wish to reserve and select 'Update':



The screenshot shows a form with the text: "You can use this form to change the number of reservations you have for this event - to cancel existing reservations, just reduce the number below." Below this is a label "Reserve spaces for team" followed by a dropdown menu showing the number "2". At the bottom are two buttons: "Update" and "Cancel".

When the manager is ready to allocate these spaces to the appropriate team member/s, they should select the 'Allocate spaces for team' option for the event on the course page:



The screenshot shows a table of events for 'NA'. The table has columns for Date, Time and Time Zone, Room, Seats available, Status, and Options. One event is listed for 1 May 2019, with 8 seats available and 'Booking open' status. The options for this event are 'Allocate spaces for team (0/4)', 'Reserve spaces for team (2/4)', and 'Sign-up'.

Date	Time and Time Zone	Room	Seats available	Status	Options
1 May 2019	9:30 AM - 4:30 PM Europe/London		8	Booking open	Allocate spaces for team (0/4) Reserve spaces for team (2/4) Sign-up

Selecting this option will allow them to select the appropriate team member from the 'Potential allocations' box and 'Add them to the 'Current allocations' box. They should also specify if these

allocated team members should replace the spaces they have already reserved (the default is set to 'YES').

The screenshot displays a user interface for managing event allocations. It is divided into two main columns: 'Current allocations (0 / 4)' on the left and 'Potential allocations (4 left)' on the right. In the center, there are two buttons: 'Add' with a left-pointing arrow and 'Remove' with a right-pointing arrow. At the bottom, there is a label 'Replace reservations when adding allocations (2)' followed by a dropdown menu currently set to 'Yes'.

Current allocations (0 / 4)	Potential allocations (4 left)
This event None Other event(s) in this activity Cath Taylor (Booked by another manager) Duncan Johnson (Self booked)	Cath Taylor Duncan Johnson Grace Howell

Replace reservations when adding allocations (2) Yes ▾

Those team members allocated will receive an email notification to confirm that they have been booked onto the event.

Appendix 1:

System Requirements - Seminar Manager Reserve and Allocate

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, 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.

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**.

The screenshot shows the 'Editing role 'Staff Manager'' interface. At the top right are 'Save changes' and 'Cancel' buttons. The 'Short name' field contains 'staffmanager'. The 'Custom full name' field is empty. The 'Custom description' field is a rich text editor with a toolbar. The 'Role archetype' dropdown is set to 'ARCHETYPE: Staff Manager'. Under 'Context types where this role may be assigned', the following checkboxes are visible: System (checked), User (checked), Category (unchecked), Program (unchecked), Course (checked), Activity module (unchecked), and Block (unchecked).

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).

Capability	Permission ⓘ
Activity: Seminar	
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
Manage reservations for an event mod/facetoface:managereervations	<input checked="" type="checkbox"/> Allow	
Reserve on behalf of other managers mod/facetoface:reserveother	<input type="checkbox"/> Allow	
Reserve or allocate spaces for team members mod/facetoface:reservespace	<input checked="" type="checkbox"/> 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**.

Capabilities table showing the 'View courses without participation' capability for the 'moodle/course:view' course. The 'Allow' checkbox is checked. The 'Save changes' button is highlighted.

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.

Assign Roles

When selecting a role, all members of this audience will be assigned to it in the system context.

Assign selected role(s) 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: Choose...
Choose...
Self enrollment
Audience sync

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

There are required fields in this form marked *.

▼ Audience sync

Custom instance name

Active

Audience*
Choose...
2
All users
Another Dynamic Audience

Assign role

Add to group

- Choose **Staff Manager** from the **Assign role** dropdown list.
- Select **Add method**.
- 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).

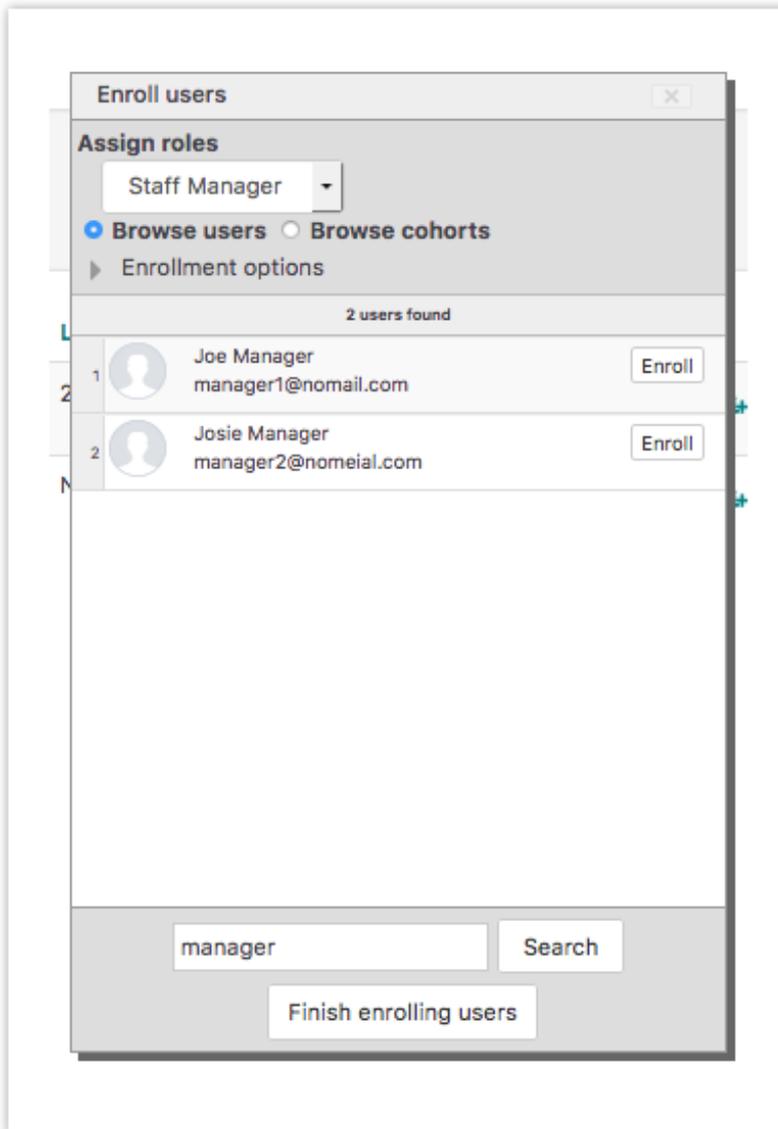
- Within the **Administration** block navigate to *Site administration > Users > Permissions > Define Roles*, click on the corresponding **Edit** icon (cog) against the **Reserving and Allocating Manager** role.
- In the **Capability** list check **Allow** against **View courses without participation**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

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

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



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

The screenshot shows a page titled "Enrolled users". At the top, there is a search bar and several filter dropdowns: "Enrollment methods" (set to "All"), "Role" (set to "All"), "Group" (set to "All part"), and "Status" (set to "All"). There are "Filter" and "Reset" buttons. A table lists the enrolled users:

First name / Last name / Email address	Last access to course	Roles	Groups	Enrollment methods
Jane Learner jane@noemail.com	2 days 18 hours	Learner ✖	+	Manual enrollments from Monday, September 26, 2016, 2:09 PM + ✖
Jack Learner jack@noemail.com	Never	Learner ✖	+	Manual enrollments from Monday, September 26, 2016, 2:09 PM + ✖
Joe Manager manager1@nomail.com	Never	Staff Manager ✖	+	Manual enrollments from Monday, October 3, 2016, 12:06 PM + ✖
Josie Manager manager2@nomeial.com	Never	Staff Manager ✖	+	Manual enrollments from Monday, October 3, 2016, 12:06 PM + ✖

At the bottom right, there is an "Enroll users" button.