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:

Manager reservations Options:

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:

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

Learner:

N 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:

N 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/facetoface/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	●	○	○

Update requests

Go back

Following 'Approval' the learner will receive an email with confirmation that they are now bookedon 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:

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

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:

Selecting tis 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').

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**.

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).

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

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**.

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 an new Dynamic Audience called 'Staff Managers' with the rule **Has direct reports** = 'Yes'.
3. Click the **Assigned Roles** tab.

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.

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

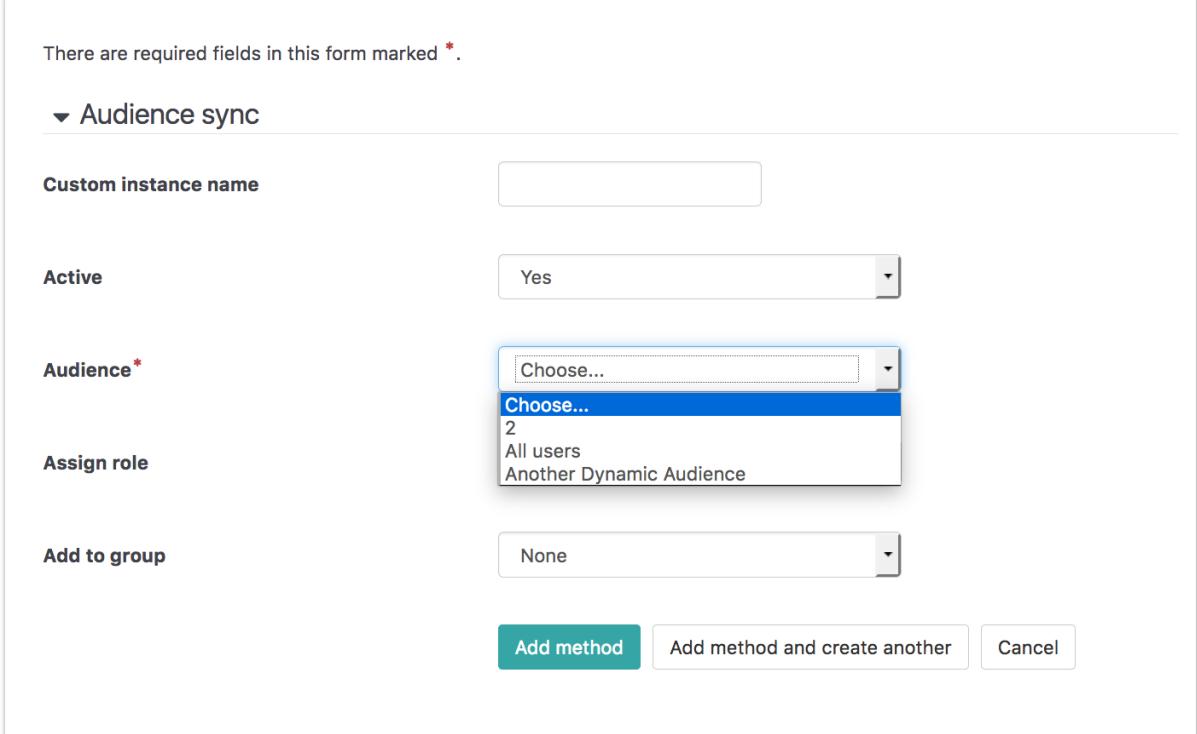There are required fields in this form marked *.

Audience sync

Custom instance name	
Active	Yes
Audience*	Choose...
	Choose...
	2
	All users
	Another Dynamic Audience
Assign role	
Add to group	None

Add method   Add method and create another   Cancel

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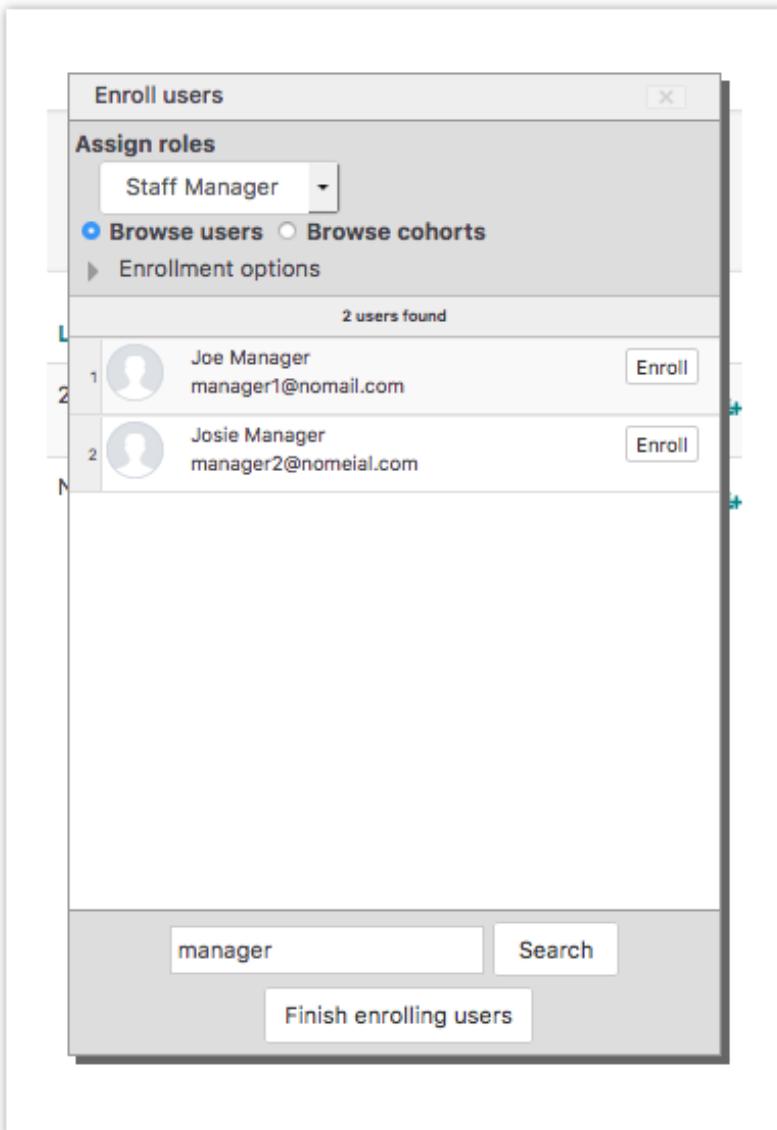
1. Within the **Administration** block navigate to *Site administration > Users > Permissions > Define Roles,* click on the corresponding **Edit** icon (cog) against the **Reserving and Allocating Manager** role.
2. In the **Capability** list check **Allow** against **View courses without participation**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