



LMS Roles & Responsibilities



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LMS Roles

Every User must be assigned an LMS role which determines their level of access to the LMS. There are 7 standard LMS roles which can be copied and modified, and new roles can be created from scratch.

The 7 default roles are:

- Student
- Manager
- Tutor
- Manager/Tutor
- Training coordinator
- LMS administrator
- Domain Administrator

When accessing the administration area of the LMS, a User will see only the areas their LMS role permits. For example, System Configuration, Groups, Users or other sections may be hidden from view.

Where an area of the LMS is accessible to a User, their role may further restrict the options available within that section. For example, a User may be able to view Course properties, but not make any changes.

When viewed in the LMS each LMS role is given an Access Level between 1-80. This indicates the level of access the role affords. Access level 1 (LMS Administrator) gives the highest level of access to the LMS. Student (access level 80) is the most restrictive.

Each of the 7 default LMS Roles are described below.

Student

Users with this role can view mandatory and optional Courses, but have no access to administer the LMS. The majority of employees within an organisation will be assigned the 'Student' role.



Tutor

A Tutor can be given very restricted administration access in order that they can manage specific Courses (and associated Lessons and Events). Users with the Tutor role see only the options described in the table below - all other areas of the LMS are hidden from view.

A Tutor can see only the following areas of the LMS:

Reports & Analysis	A reduced list of reports is available. Reports will only include data for the Courses (Lessons and Events) of which they are a Tutor or an Administrator, or for Accreditations for which they are a Tutor.
Courses	Only the Course(s) for which a User is nominated as the Tutor will be listed (see special responsibilities section below). As Course Tutor, a User has unrestricted access to the Course administration menu, and can therefore assign any existing Lessons, and deploy the Course to any Group or Catalogue. A Course Tutor cannot create new Courses or delete existing Courses.
Lessons	Only the Lesson(s) assigned to a Course of which the user is nominated as Tutor will be listed (see special responsibilities section below). As Course Tutor, a User has full access to the Lesson administration menu for the available Lessons. However, they can only assign Lessons to Courses for which they are nominated as Tutor. A Course Tutor cannot create new Lessons or delete existing Lessons.
Event	Only Events linked to Courses for which the User is nominated as Tutor will be visible. A Tutor has full access to options in the Event Administration menu.

All other sections (listed below) are not visible to Tutors:

- Users
- Groups
- Resource
- Evaluation Form
- Reflection Form
- Job Profile
- Accreditation
- CPD Programme
- System Configuration

See the '[Additional Responsibilities](#)' section (p8) to find out more how the tutor role might be used, including how to nominate a User as Tutor for a Course.



Manager

The main function of the 'Manager' LMS role is to identify line management responsibilities in the LMS. The Manager role therefore, permits a User restricted access to administer members of their team only.

A Manager can see only the following areas of the LMS:

User	The User list will include only members of the managers team (that is, Users who are members of their Primary Group). See the 'Manager' responsibility below for more information.
Group	A manager can view (but cannot change) the properties of any Groups to which they are nominated as Group Manager or Group Administrator. See the ' Additional Responsibilities ' section (p8).
Reports & Analysis	A reduced list of reports is available. Reports will only include data for Users who are members of the manager's team.
Courses	A Manager can view details for all Courses in the LMS, but cannot view or edit any other properties. A Manager cannot create new Courses or delete Courses they are able to see.
Lessons	A Manager can view details for all Lesson in the LMS, however a reduced list of properties is visible on the Lesson Administration menu. A Manager cannot create or delete Lessons, or edit Lesson properties.
Event	All Events are visible, however only the 'User' option is available in the Event administration menu. Through this option, a manager can book any member of their team onto any Event. A manager can view but cannot edit, all other Event properties.
CPD Programme	Can view all CPD Programmes but cannot make any changes

All other sections (listed below) are not visible to Managers:

- Resource
- Evaluation Form
- Reflection Form
- Job Profile
- Accreditation
- System Configuration

See the '[Additional Responsibilities](#)' section (p8) to find out more about defining line management responsibilities, and how the Manager role might be used.

Note: Customers sometimes prefer that managers cannot access the admin side of the LMS at all. See [Custom Role examples](#) (p15) for steps to remove this permission.



Manager / Tutor

This role effectively gives a Manager access to Tutor functionality. Where a manager is able to view and administer members of their team, and a tutor can administer specific Courses, so a Manager/Tutor is able to do both.

A Manager/Tutor can see only the following areas of the LMS:

User	As with the Manager LMS role, the User list will include only members of the managers team (that is, Users who are members of their Primary Group). See the ‘Group Manager’ responsibility (p12) for more information.
Group	A Manager/Tutor can view and make changes to any Groups to which they have been assigned as a Manager or administrator, See the ‘Additional Responsibilities’ section (p8).
Reports & Analysis	A reduced list of reports is available. Reports will include data only for Users who are members of the manager’s team and for Courses for which the Manager/Tutor is assigned as Tutor.
Courses	All Courses, and all properties as listed in the Course administration menu are visible. If assigned as administrator or Tutor for a Course, a Manager/Tutor is able to edit the properties in the Course administration menu and can therefore assign Lessons and deploy the Course to any Group or Catalogue. A Manager/Tutor cannot create new Courses or delete existing Courses.
Lessons	All Lessons, and all properties as listed in the Lesson administration menu are visible. If assigned as administrator or Tutor for a Course, a Manager/Tutor has full access to edit the properties for any Lesson assigned to a Course of which they are the tutor (It is not possible for a Manager /Tutor to assign Lessons to a Course for Course which they are not the Tutor). A Manager/Tutor cannot create new Lessons or delete existing Lessons.
Event	As with the manager’s role, all Events and properties as listed in the Event administration menu are visible, however only the ‘User’ option is available to edit. Through this option, a manager can book any member of their team onto any Event.
CPD Programme	Can view all CPD Programmes but cannot make any changes

All other sections (listed below) are not visible to Manager/Tutors:

- Resource
- Evaluation Form
- Reflection Form
- Job Profile
- Accreditation
- System Configuration

See the [‘Additional Responsibilities’](#) section (p8) find out more how the Manager/Tutor role might be used.





Training coordinator

The Training coordinator role is virtually identical to the LMS administrator role, with the exception that Training coordinators do not have access to System Configuration. Training Coordinators have unlimited access to all other areas of the LMS.

LMS Administrator

LMS Administrators have unlimited access to all areas of the LMS. This is the only role which allows access to the global settings contained within System Configuration.

Tip: to view a list of all Users with a specific role:

- Select **LMS role** in the System configuration menu to view a list of all LMS roles.
- Select a role, then select **User** in the LMS role Administration Menu. All Users with that role will be listed.



Additional Responsibilities

Users can be given additional responsibilities to manage specific Users, Groups, Courses, and Events in the LMS. The special responsibilities are:

- [Course Tutor](#)
- [Course Administrator](#)
- [Group Administrator](#)
- [Group Manager](#)
- [Event Administrator](#)

The table below details which LMS roles can be assigned each additional responsibility:

LMS Role	Additional Responsibility				
	Course Tutor	Course administrator	Event Administrator	Group Administrator	Group Manager
Student					
Manager				X	X
Tutor	X	X	X		
Tutor / Manager	X	X	X	X	X
Training Coordinator	X	X	X	X	X
LMS Administrator	X	X	X	X	X

Course Tutor

When a User is assigned as Tutor for a course(s), they are given restricted access to the LMS to administer that Course only. A Course Tutor will see only the Reports & Analysis, Course, Lesson and Event sections. Each section will list only the Courses, Lessons and Events for which they are a Course Tutor, and any reports are limited to include only the Courses for which the User is a Tutor.

In summary, a Course tutor can:

- Manage Events for the Course of which they are a tutor (Book users, mark attendance etc)
- Assign Lessons and deploy the Course to Users, Groups and Catalogues
- Run Reports on the Course.

Why make a User a Course Tutor?

Users are often assigned as Course Tutors for reporting purposes. For example, an internal GDPR representative may need access to the LMS to run reports for the GDPR course only.

A Course Tutor can also be nominated as Course authoriser for any course of which they are a tutor, either as single stage approval or two stage approval (Manager and Tutor).

Note: When a User is nominated as Tutor for a Course, they are automatically made a Course administrator. See the 'Course administrator' special responsibility below for more detail.

A User is assigned as Course Tutor from the Course Details page:

Category Professional development
Tutor -- Not specified -- → Select... ✕ Clear
Enrolment method Automatic
Cost
Maximum users There is currently 1 enrolment for this course.
 Course is enabled

For more information about the 'Tutor' LMS Role, see the section '[Tutor LMS Role](#)' (p4).

Course Administrator

A Course administrator has the same rights to view and edit a Course as the Course Tutor, with two exceptions:

1. multiple Users can be Course administrators, whereas a Course can have only one Tutor
2. a Course administrator cannot be nominated as Course authoriser, whereas a Course Tutor can

Note: When a User is nominated as an Administrator for a Course, they are automatically made the Course Tutor (if a Tutor is not already nominated). See the 'Course Tutor' special responsibility above for more detail.

To assign a User the Course administrator responsibility, select 'Administrator' from the Course administration menu:

Course Administration

- Details
- Custom fields
- Availability
- Deadline
- Catalogue
- Lesson
- Group
- User
- Administrators
- Results
- Ratings

This course was created on 10 April 2018. The details were last modified on 10 April 2018.

To add a new assignment, place a tick mark next to the item and click **Submit**. To remove an assignment, place a tick mark and click **Submit**.

Current All A B C D E F G H I J K L M N

<input type="checkbox"/>	Admin2 (DO NOT DELETE), Kallidus [KallidusAdmin2]
<input type="checkbox"/>	Andrews, Daniel [Andrewsd] L&D administrator Matt Troy
<input type="checkbox"/>	Davis, Patricia [Davisp] HR administrator
<input type="checkbox"/>	Evans, Louisa [evansl]

Group Administrator

The Group Administrator responsibility is used primarily for reporting. A Group admin can report on all Users in a group for which they are nominated as an administrator.

Why make a User a Group Administrator?

The Group administrator responsibility can be used to give managers oversight of one another's teams. For example, if a User with line management responsibility (i.e. is the manager of a Primary Group) is made an administrator for another managers' primary Group, then they will see that managers team members in their manager dashboard in addition to their own team members.

In a retail environment, a store manager may want to be assigned as Group administrator of all Primary Groups in the store. The store manager would then be able to see all employees in their manager dashboard - not just those who are direct reports, and could also run Business Objects reports on any manager's team.

To assign a User the Group administrator responsibility, select 'Administrator' from the Group administration menu:

Group Administration

Details

Custom fields

Members

Administrators

Group

Hierarchy

Accreditation

Catalogue

This group was created on 03 July 2017. The details were last modified on 12 January 2018.

To add a new assignment, place a tick mark next to the item and click **Submit**. To remove an assignment, place a tick mark next to the item and click **Submit**.

Current All

A B C D E F G H I J K L M N O

Admin2 (DO NOT DELETE), Kallidus [KallidusAdmin2]

Andrews, Daniel [Andrewsd]

L&D administrator

Matt Troy

Group Manager

The 'Group Manager' responsibility is used to define Line Management responsibility. In order for a manager to see their team members in the Managers dashboard in Learn, the below steps must be followed:

1. A Group must be created (management Groups are often given the name of the manager)
2. The Group must be the Primary Group for one or more Users (each user can have one group designated as their primary group)
3. The Manager for the Group must be specified

The manager for the Group will then see in the Managers dashboard, all Users for whom the Group is their Primary Group. **Note:** Primary Groups, and Primary Group managers are typically created and managed by the People Data Feed.

To assign a User as Group Manager, select 'Manager' from the Group Details page:

Group Administration

- Details
- Custom fields
- Members
- Administrators
- Group
- Accreditation
- Catalogue
- Course
- Rules
- Send email
- Report

This group was created on 10 May 2017. The details were last modified on 12 January 2016.

i This group cannot be deleted because one or more users have it as their primary group.

Code

9 / 200

Title

9 / 200

Description

B Paragraph ▾

Matt Troy

Group category Management Groups ▾

Manager ➤ Select... ✖ Clear

Active theme -- Not specified -- ▾

Submit
Copy

Event Administrator

This responsibility offers a User very restricted access to view and edit specific Events only. The administrator will receive all emails relating to the event, for example if a user books a place on the event or cancels a booking.

In summary, an Event administrator can:

- Manage every aspect of an Event for which they are an administrator.
- Receive notifications relating to the event.
- Be nominated as an Event approver. For example, permission might not be needed to go on a course, but a User may need to request permission to book a specific Event date).

Why make a User an Event Administrator?

Common uses for this role include:

- A trainer may be given access to their training Events to mark attendance
- A junior administrator may be responsible for booking places on specific Events

To assign a User the Course administrator responsibility, select 'Administrator' from the Course administration menu:

Owner	-- Not specified --	→ Select...	✕ Clear
Administrator	Troy, Matt	→ Select...	✕ Clear
Approval type	Automatic		
Cost code	<input type="text"/>		
Attendance charge (GBP)	<input type="text"/>		
Non-attendance charge (GBP)	<input type="text"/>	Charge period	<input type="text"/> ▾
Attendance rebate (GBP)	<input type="text"/>		
<input checked="" type="checkbox"/> Event is enabled			

Create a custom LMS role

LMS roles comprise a set of permissions, each of which allows access to a specific feature or function in the LMS. For example a permission might allow a User to add, create or delete a Course, or to view the properties of any Group.

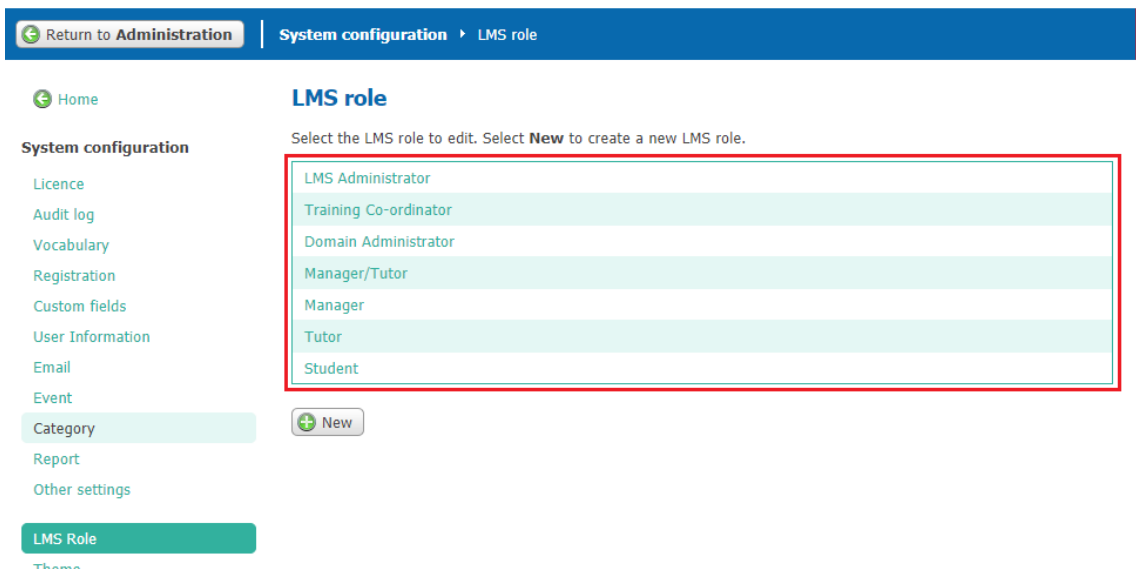
In some instances however the default roles and the permissions of which they are comprised, may not quite fit what you require. Where that is the case, a custom role can be created. When creating and customising LMS roles, it is recommended that these rules are followed:

- **Never change a role which is currently active.** Any users with that role will be instantly effected by any changes to permissions
- **Never customise the default roles** - always copy the standard role which most closely matches the role you need, and create a new role from that. This ensures it is always possible to return to the starting point if required.
- **Test after each change** to ensure it has had the desired effect. Permissions can be complicated and some are interlinked.
- **Make a note of the changes.** In the role description field, note the role from which the custom role was copied, and any permissions that have been changed.

Creating custom roles can be complex as many permissions are interlinked. . If you would like to create a custom role and would like some guidance, please contact your account manager. Please note that the Kallidus helpdesk support only the standard LMS roles.

Steps to create a custom LMS role

1. **Select the LMS role on which the new custom role will be based.** Navigate to Administration home and select 'System Configuration'. From the System Configuration menu select 'LMS Role' and click to open one of the 7 standard role (alternatively click 'New' to create a new role from scratch)



Return to Administration | System configuration > LMS role

Home

System configuration

- Licence
- Audit log
- Vocabulary
- Registration
- Custom fields
- User Information
- Email
- Event
- Category
- Report
- Other settings
- LMS Role

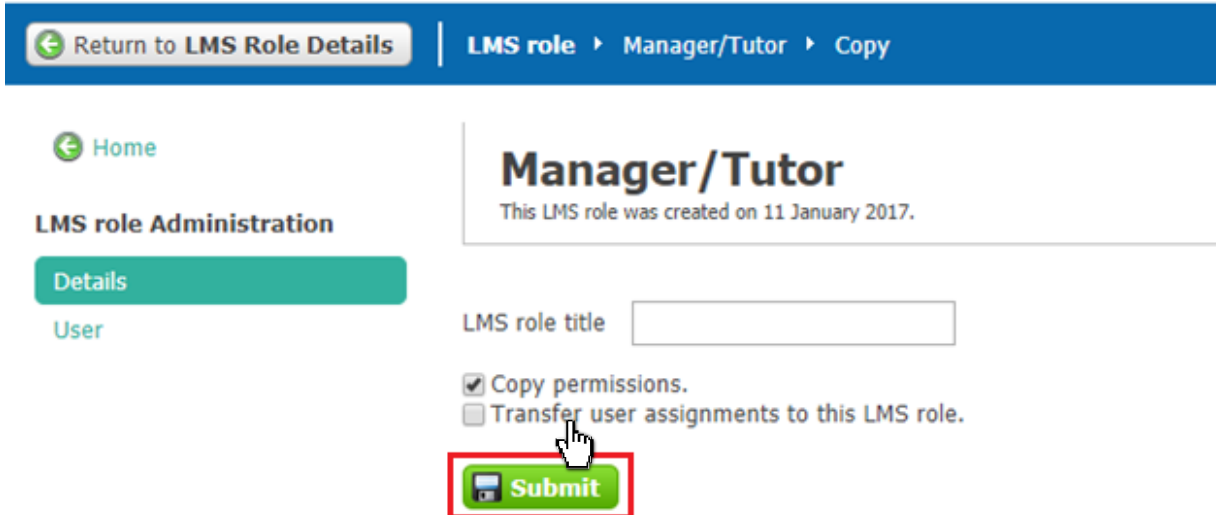
LMS role

Select the LMS role to edit. Select **New** to create a new LMS role.

LMS Administrator
Training Co-ordinator
Domain Administrator
Manager/Tutor
Manager
Tutor
Student

+ New

2. **Copy the role.** Click 'Copy' and name the new role. Select the 'Copy permissions' checkbox to copy the permissions to the new role. At this point, it is also possible to transfer existing User assignments to the new role. This action can also be performed later. Click '**Submit**' to save the new role:



Return to LMS Role Details | LMS role ▸ Manager/Tutor ▸ Copy

Home

LMS role Administration

Details

User

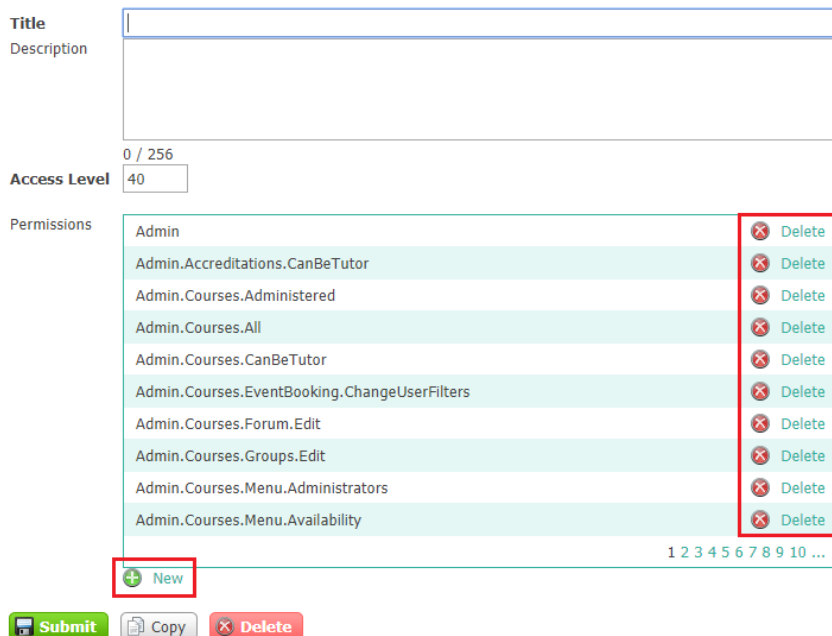
Manager/Tutor
This LMS role was created on 11 January 2017.

LMS role title

Copy permissions.
 Transfer user assignments to this LMS role.

Submit

3. **Add / remove permissions as required.** Click '**Delete**' on a permission row to remove it (To locate an existing permission, use the search filter on the left of the page). To add a Permission, click '**New**' and enter the permission string into the item field. Refer to the [Permissions section](#) (p16) for a full list of permissions. Click '**Submit**' once the required changes have been made.



Title
Description

0 / 256

Access Level

Permissions

Admin	Delete
Admin.Accreditations.CanBeTutor	Delete
Admin.Courses.Administered	Delete
Admin.Courses.All	Delete
Admin.Courses.CanBeTutor	Delete
Admin.Courses.EventBooking.ChangeUserFilters	Delete
Admin.Courses.Forum.Edit	Delete
Admin.Courses.Groups.Edit	Delete
Admin.Courses.Menu.Administrators	Delete
Admin.Courses.Menu.Availability	Delete

1 2 3 4 5 6 7 8 9 10 ...

New

Submit Copy Delete

4. **Assign the role.** Select '**User**' from the LMS role administration menu, and select the User(s) to whom the new role should be assigned. Alternatively, navigate to a Users' profile, where the LMS role can also be specified.



Custom role examples

The below examples demonstrate 3 different roles which can be created by adapting a standard LMS role.

Manager without admin access

Users with the default [Manager LMS role](#) (p5) are able to access the admin side of the LMS. This enables a manager to book members of their primary group onto Events and run reports on their progress. It may be desirable however, to remove this access from the Manager LMS role.

To remove admin access, delete the following permission from the 'Manager' LMS role:

admin

Content Uploader

This role allows reduced access to the LMS in order that a User can upload eLearning content. Other areas of the LMS are hidden from view.

To create the Content uploader role, copy the Manager / tutor role and **ADD** the following permission:

admin.courses.import

Then **DELETE** the following permissions:

admin.report
Admin.events

Global Event administrator.

An [Event administrator](#) (p11) can be given responsibility to manage a specific Event. However it may be desirable to allow a group of junior administrators access to manage ALL events. This role allows unlimited access to the Event area of the LMS. All other areas of the LMS are hidden.

To create the Global Event administrator role, copy the 'Training Coordinator' role and DELETE the following permissions:

admin.courses.all
Admin.groups.all
Admin.learningobjects.all
Admin.users.all
Admin.catalogues
Admin.accreditations
Admin.resources
Admin.jobprofiles
Admin.cpd
Admin.evaluationforms
Admin.reflectionforms
Admin.reports

Tip: to view a list of all Users with a specific role, Select **LMS role** in the System configuration menu to view a list of all LMS roles. Select a role, then select **User** in the LMS role Administration Menu. All Users with that role will be listed.

List of Permissions

Permission	Description	LA	TC	MT	T	M	S
Accreditation	Permits access to the accreditation administration page. This page is normally not available from the Learning Management System, and must be accessed with the following URL (where <i>server</i> is the name of the server hosting the Learning Management System): http://server/LMS/admin/frmAccreditation.aspx	✓	✓				
Admin	Permits access to administration. When this permission is granted, the Administration link appears in the system navigation bar.	✓	✓	✓	✓	✓	
Admin.AccreditationElements.Create	Allows the user to create a new accreditation element.	✓	✓				
Admin.AccreditationElements.Details.Edit	Allows the user to edit existing accreditation elements.	✓	✓				
Admin.Accreditations	Allows the user to view all accreditation.	✓	✓				
Admin.Accreditations.CanBeTutor	Users with this permission can be assigned as tutors for an accreditation on the user accreditation details page.	✓	✓	✓	✓	✓	
Admin.Accreditations.Categories.Edit	Allows the user to edit categories for accreditations.	✓	✓				
Admin.Accreditations.Create	Allows the user to create new accreditations.	✓	✓				
Admin.Accreditations.CustomFields.Edit	Allows the user to edit the custom field values for an accreditation	✓	✓				
Admin.Accreditations.Details.Edit	Allows the user to edit existing accreditations.	✓	✓				
Admin.Accreditations.Elements.Edit	Allows the user to edit the element assignments for an accreditation.	✓	✓				
Admin.Accreditations.Elements.Ratings.Edit	Allows the user to create and edit element ratings and assign them to elements.	✓	✓				



Permission	Description	LA	TC	MT	T	M	S
Admin.Accreditations.Groups.Edit	Allows the user to assign groups to accreditations.	✓	✓				
Admin.Accreditations.Import	Allows the user to import accreditations	✓	✓				
Admin.Accreditations.Import.Delete	Allows the user to delete accreditation import definitions	✓					
Admin.Accreditations.Menu.CustomFields	Allows the user to view the custom fields page for an accreditation	✓	✓				
Admin.Accreditations.Users.Edit	Allows the user to edit the user assignments for an accreditation.	✓	✓				
Admin.Accreditations.Users.Edit.ExpiryDate	Allows the user to edit the expiry date for an accreditation.	✓	✓				
Admin.Accreditations.Users.Import	Allows the user to import users onto accreditations	✓	✓				
Admin.Accreditations.Users.Import.Delete	Allows the user to delete accreditation users import definitions	✓					
Admin.AdminGuide	Allows the user to view the administration guide from the LMS.	✓	✓				
Admin.Catalogues	Allows the user to view all catalogues.	✓	✓				
Admin.Catalogues.Categories.Edit	Allows the user to edit categories for catalogues.	✓	✓				
Admin.Catalogues.Courses.Edit	Allows the user to assign courses to catalogues.	✓	✓				
Admin.Catalogues.Create	Allows the user to create catalogues.	✓	✓				
Admin.Catalogues.CustomFields.Edit	Allows the user to edit the custom field values for a catalogue	✓	✓				
Admin.Catalogues.Details.Edit	Allows the user to edit catalogue details.	✓	✓				
Admin.Catalogues.Groups.Edit	Allows the user to assign groups to catalogues.	✓	✓				



Permission	Description	LA	TC	MT	T	M	S
Admin.Catalogues.Menu.CustomFields	Allows the user to view the custom fields page for a catalogue	✓	✓				
Admin.Catalogues.Users.Edit	Allows the user to assign users to catalogues.	✓	✓				
Admin.Courses.Administered	Allows the user to administer courses they are assigned as an administrator for,			✓	✓		
Admin.Courses.Administrators.Edit	Allows the user to assign administrators to courses.	✓	✓				
Admin.Courses.All	Allows the user to view all courses.	✓	✓	✓		✓	
Admin.Courses.CanBeTutor	Users with this permission will appear in the Tutor drop down list on the course details page.	✓	✓	✓	✓		
Admin.Courses.Categories.Edit	Allows the user to create categories for a course.	✓	✓				
Admin.Courses.Create	Allows the user to create new courses.	✓	✓				
Admin.Courses.CustomFields.Edit	Allows the user to edit the custom field values for a course	✓	✓				
Admin.Courses.Dates.Edit	Allows the user to edit the deadline and expiry dates for existing courses.	✓	✓				
Admin.Courses.Delete	Allows the user to delete a course.	✓	✓				
Admin.Courses.DeleteResults	Allows the user to delete results for a course.	✓	✓				
Admin.Courses.Details.Cost.View	Allows the user to view course costs.	✓	✓				
Admin.Courses.Details.Edit	Allows the user to edit the details for existing courses.	✓	✓				
Admin.Courses.EventBooking.ChangeUserFilters	Allows the user to change the user filter selections on the Event Booking page for a course.	✓	✓			✓	
Admin.Courses.Groups.Edit	Allows the user to assign groups to courses.	✓	✓	✓	✓		



Permission	Description	LA	TC	MT	T	M	S
Admin.Courses.Import	Allows the user to import courses.	✓	✓				
Admin.Courses.LearningObjects.Edit	Allows the user to assign learning objects to courses.	✓	✓				
Admin.Courses.Menu.Administrators	Allows the user to access the course administrators page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.Availability	Allows the user to access the availability page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.Catalogues	Allows the user to access the catalogues page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.CustomFields	Allows the user to view the custom fields page for a course	✓	✓				
Admin.Courses.Menu.Deadline	Allows the user to access the deadline page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.Email	Allows the user to access the send email page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.EmailTemplates	Allows the user to access the email templates page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.EvaluationForm	Allows the user to access the evaluation form page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.EventBooking	Allows the user to access the event booking page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.Groups	Allows the user to access the groups page when they select a course from the user list	✓	✓	✓	✓		



Permission	Description	LA	TC	MT	T	M	S
Admin.Courses.Menu.LearningObjects	Allows the user to access the lessons page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.Ratings	Allows the user to access the course ratings page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.Reports	Allows the user to access the reports page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.Results	Allows the user to access the results page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.Menu.Users	Allows the user to access the users booking page when they select a course from the user list	✓	✓	✓	✓		
Admin.Courses.SendEmail	Allows the user to send an email to users enrolled onto a course.	✓	✓	✓	✓		
Admin.Courses.Users.Edit	Allows the user to assign users to courses.	✓	✓	✓	✓		
Admin.Cpd	Controls whether the “CPD Programme” item appears in the administration menu for a user, and whether a user has access to the CPD Programme and CPD Period administration sections.	✓	✓	✓		✓	
Admin.Cpd.Categories.Edit	Allows the user to edit CPD Programme Professional bodies.	✓	✓				
Admin.Cpd.Create	Allows the user to create new CPD Programmes.	✓	✓				
Admin.Cpd.Delete	Allows the user to delete CPD Programmes and CPD Periods	✓	✓				
Admin.Cpd.Details.Edit	Allows the user edit the details of CPD Programmes and CPD Periods; to edit custom email templates for a CPD Programme and to edit notification settings for CPD Programmes.	✓	✓				
Admin.Cpd.LearningObjects.Edit	Allows the user to assign learning objects to CPD Periods.	✓	✓				



Permission	Description	LA	TC	MT	T	M	S
Admin.Cpd.UserCpdValueHistory.Edit	Allows the user to edit any records which have contributed a value towards a CPD Period for a user.	✓	✓	✓		✓	
Admin.Cpd.UserCpdValueHistory.View	Allows the user to view any records which have contributed a value towards a CPD Period for a user.	✓	✓	✓		✓	
Admin.Cpd.Users.Edit	Allows the user to assign users to CPD Periods.	✓	✓	✓		✓	
Admin.EducationPanel.IsEnabled	Controls whether or not users can view the User Education Panel (A section where Kallidus can highlight new features and news to administrators).	✓	✓				
Admin.EvaluationForms	Controls whether “Evaluation forms” appears in the administration menu for a user.	✓	✓				
Admin.EvaluationForms.Create	Allows the user to create new evaluation forms.	✓	✓				
Admin.EvaluationForms.Delete	Allows the user to remove evaluation forms from the system.	✓	✓				
Admin.EvaluationForms.Details.Edit	Allows the user to edit the details and questions for evaluation forms.	✓	✓				
Admin.Events	Controls whether the “Events” item appears in the administration menu for a user.	✓	✓	✓	✓	✓	
Admin.Events.Administered	Allows the user to view and edit the details for events that are part of courses they are an administrator for.			✓	✓		
Admin.Events.All	Allows the user to view all learning events.	✓	✓	✓		✓	
Admin.Events.Costs.Edit	Allows the user to edit the costs for a learning event.	✓	✓	✓	✓		
Admin.Events.Costs.Report	Allows the user to create cost reports for learning events.	✓	✓	✓	✓		
Admin.Events.CustomFields.Edit	Allows the user to edit the custom field values for an event	✓	✓	✓	✓		



Permission	Description	LA	TC	MT	T	M	S
Admin.Events.Delete	Allows the user to delete a learning event. The user must also have the permission “Admin.Events.All”, or be the administrator for the event, or be an administrator of a course that contains the event.	✓	✓				
Admin.Events.Details.Charges.View	Allows the user to view event charges	✓	✓				
Admin.Events.Details.Edit	Allows the user to edit event details.	✓	✓	✓	✓		
Admin.Events.Groups.Edit	Allows the user to edit the group assignments for the event.	✓	✓	✓	✓		
Admin.Events.Menu.CustomFields	Allows the user to view the custom fields page for an event.	✓	✓	✓	✓		
Admin.Events.Menu.Groups	Allows the user to view the group assignments for the event.	✓	✓	✓	✓		
Admin.Events.Results.Edit	Allows the user to edit information for users on an event, using the event’s attendance page.	✓	✓	✓		✓	
Admin.Events.Results.Edit.ActualCost	Allows the user to edit the actual cost information for a user on an event, using the event’s attendance page.	✓	✓	✓		✓	
Admin.Events.Results.Edit.CancellationDate	Allows the user to edit the cancellation date for a user on an event, using the event’s attendance page.	✓	✓	✓		✓	
Admin.Events.Results.Edit.Comments	Allows the user to edit the comments information for a user on an event, using the event’s attendance page.	✓	✓	✓		✓	
Admin.Events.Results.Edit.CostCode	Allows the user to edit the cost code for a user on an event, using the event’s attendance page.	✓	✓	✓		✓	
Admin.Events.Results.Edit.ProjectCost	Allows the user to edit the projected cost for a user on an event, using the event’s attendance page.	✓	✓	✓		✓	
Admin.Events.Results.Edit.Reason	Allows the user to edit the reason for a user’s status on an event, using the event’s attendance page.	✓	✓	✓		✓	



Permission	Description	LA	TC	MT	T	M	S
Admin.Events.Results.Edit.Score	Allows the user to edit the score for a user on an event, using the event's attendance page.	✓	✓	✓		✓	
Admin.Events.Results.Edit.Status	Allows the user to edit the status for a user on an event, using the event's attendance page.	✓	✓	✓		✓	
Admin.Events.Results.Edit.UserComments	Allows the user to edit the user comments for a user on an event, using the event's attendance page.	✓	✓	✓		✓	
Admin.Events.SendEmail	Allows the user to send an email to users attending a learning event, or on the waiting list for an event.	✓	✓	✓	✓		
Admin.Events.Users.Edit	Allows the user to assign users to events.	✓	✓			✓	
Admin.Events.Users.Edit.Delete	Allows the user to delete a user's assignment to an event.	✓	✓			✓	
Admin.Events.Users.Edit.Ended	Allows the user to assign users to events that have ended. Without this permission, users can only be assigned to future events.	✓	✓			✓	
Admin.Events.Users.Import	Allows the user to import users results for events	✓	✓				
Admin.Events.Users.IgnoreGroupRestrictions	Allows the user to ignore any group event restrictions that have been applied when editing the user assignments for an event	✓	✓				
Admin.Events.Users.Import.Delete	Allows the user to delete Event import definitions	✓					
Admin.Events.Users.OverrideMaximum	Allows the user to confirm an event booking even if the maximum number of attendees has already been reached. Also allows confirmation of users onto the waiting list if the maximum number of waiting list users has been reached.	✓	✓				
Admin.Events.Users.OverrideMultipleBookings	Allows the user to confirm an event booking even if the lesson only allows one booking per user, and the user is already confirmed for another event.	✓	✓				
Admin.ExchangeIntegration	Allows the user to configure Exchange integration.	✓					



Permission	Description	LA	TC	MT	T	M	S
Admin.Groups.Administered	Allows the user to administer groups they are assigned as an administrator for.			✓		✓	
Admin.Groups.Administrators.Edit	Allows the user to add administrators to groups.	✓	✓				
Admin.Groups.All	Allows the user to view all groups.	✓	✓				
Admin.Groups.CanBeManager	Users with this permission will appear in the Manager drop down list on the group details page.	✓	✓	✓		✓	
Admin.Groups.Categories.Edit	Allows the user to edit categories for groups.	✓	✓				
Admin.Groups.Create	Allows the user to create new groups.	✓	✓				
Admin.Groups.CustomFields.Edit	Allows the user to edit the custom field values for a group	✓	✓				
Admin.Groups.Descendants.Edit	Allows the user to edit the group descendants for a group (to build group hierarchies).	✓	✓				
Admin.Groups.Details.Edit	Allows the user to edit existing groups.	✓	✓				
Admin.Groups.Managed.Details.Edit	Allows the user to edit the details for groups they are a manager for.	✓	✓	✓		✓	
Admin.Groups.Menu.CustomFields	Allows the user to view the custom fields page for a group	✓	✓				
Admin.Groups.Rules.Edit	Allows the user to edit the group membership rules for a group.	✓	✓				
Admin.Groups.SendEmail	Allows the user to send an email to members of a group.	✓	✓	✓		✓	
Admin.Groups.Users.Edit	Allows the user to assign members to existing groups.	✓	✓				
Admin.JobProfiles	Allow the user to view job profiles.	✓	✓				
Admin.JobProfiles.Categories.Edit	Allows the user to create categories for job profiles.	✓	✓				



Permission	Description	LA	TC	MT	T	M	S
Admin.JobProfiles.Create	Allow the user to create job profiles.	✓	✓				
Admin.JobProfiles.CustomFields.Edit	Allows the user to edit the custom field values for a job profile	✓	✓				
Admin.JobProfiles.Details.Edit	Allow the user to edit the details of job profiles.	✓	✓				
Admin.JobProfiles.Menu.CustomFields	Allows the user to view the custom fields page for a job profile	✓	✓				
Admin.JobProfiles.ShowAll	Allows the user to view all the job profiles not just the ones they created.	✓	✓	✓	✓	✓	✓
Admin.JobProfiles.Users.Edit	Allows the user to assign users to job profiles.	✓	✓				
Admin.LearningObjects.Administered	Allows the user to view and the details for learning objects that are part of courses they are an administrator for.			✓	✓		
Admin.LearningObjects.All	Allows the user to view all learning objects.	✓	✓	✓		✓	
Admin.LearningObjects.Categories.Edit	Allows the user to edit learning object categories.	✓	✓				
Admin.LearningObjects.Create	Allows the user to create new learning objects.	✓	✓				
Admin.LearningObjects.CustomFields.Edit	Allows the user to edit the custom field values for a learning object	✓	✓				
Admin.LearningObjects.CustomLinks.Edit	Allows the user to edit the custom links for a learning object.	✓	✓				
Admin.LearningObjects.Delete	Allows the user to delete a learning object. The user must also have the permission "Admin.LearningObjects.All", or be an administrator of a course that contains the learning object.	✓	✓				
Admin.LearningObjects.Details.Cost.View	Allows the user to view learning object costs.	✓	✓				



Permission	Description	LA	TC	MT	T	M	S
Admin.LearningObjects.Details.Edit	Allow the user to edit learning objects.	✓	✓				
Admin.LearningObjects.Documents.Edit	Allows the user to upload a document.	✓	✓				
Admin.LearningObjects.EditFiles	Allows the user to edit the files for a learning object.	✓	✓				
Admin.LearningObjects.Menu.CustomFields	Allows the user to view the custom fields page for a learning object	✓	✓				
Admin.LearningObjects.Notes.Edit	Allows the user to record “notes” against lessons.	✓	✓				
Admin.LearningObjects.Notes.View	Allows the user to view notes for the learning object.	✓	✓				
Admin.LearningObjects.NotifyList.ChangeUserFilters							
Admin.LearningObjects.Reservations.Edit	Allows the user to edit reservations for materials.	✓	✓				
Admin.LearningObjects.Resources.Edit	Allows the user to edit learning object resources.	✓	✓				
Admin.LearningObjects.Results.Edit	Allows the user to edit results records for learning objects, using the results page for a lesson or a course.	✓	✓	✓		✓	
Admin.LearningObjects.Results.ViewAll	Allows the user to view all results records for learning objects. Normally, a user can only see results records for users they are a manager for.	✓	✓				
Admin.LearningObjects.SendEmail	Allows the user to send an email to users enrolled onto a learning object.	✓	✓	✓	✓		
Admin.LearningObjects.ELearning.Edit	Allows the user to edit the E-Learning set-up for the learning object.	✓	✓				
Admin.LearningRecord.Import	Allows the user to import users results for non-instructor led learning objects	✓	✓				
Admin.LearningRecord.Import.Delete	Allows the user to delete Learning record import definitions	✓					



Permission	Description	LA	TC	MT	T	M	S
Admin.ReportingGuide	Allows the user to view the Kallidus Reporting Getting Started guide from the LMS.	✓	✓				
Admin.Reports	Allows the user to view all reports.	✓	✓	✓	✓	✓	
Admin.Reports.AllUsers	Allows the user to create reports for all users. Normally, the reports will only show users that are a manager for.	✓	✓				
Admin.Reports.Custom	Allows the user to view the custom reports, if available.	✓	✓	✓	✓	✓	
Admin.Reports.Schedule.Favourites	Allows the user to schedule their favourite reports	✓	✓	✓	✓	✓	
Admin.Reports.Schedule.Standard	Allows the user to schedule their standard reports	✓	✓	✓	✓	✓	
Admin.Reports.Shared.Folder.Create	Allows the user to create a new shared report folder	✓					
Admin.Reports.Shared.Folder.Delete	Allows the user to delete a shared report folder	✓					
Admin.Reports.Shared.Folder.Rename	Allows the user to rename a shared report folder	✓					
Admin.Reports.Shared.Folder.View	Allows the user to view shared reports	✓	✓	✓	✓	✓	
Admin.Reports.Shared.Report.Delete	Allows the user to delete a shared report	✓					
Admin.Reports.Shared.Report.Schedule	Allows the user to schedule shared reports	✓	✓	✓	✓	✓	
Admin.Reports.ViewAllSchedules	Allows the user to view all the report schedules submitted by any user within their LMS	✓					
Admin.Resources	Allows the user to view all resources	✓	✓				
Admin.Resources.Bookings.Categories.Edit	Allows the user to edit the resource bookings categories.	✓	✓				
Admin.Resources.Bookings.Edit	Allows the user to edit bookings for resources.	✓	✓				



Permission	Description	LA	TC	MT	T	M	S
Admin.Resources.Categories.Edit	Allows the user to edit the resource categories.	✓	✓				
Admin.Resources.Create	Allows the user to create new resources.	✓	✓				
Admin.Resources.CustomFields.Edit	Allows the user to edit the custom field values for a resource	✓	✓				
Admin.Resources.Details.Edit	Allows the user to edit existing resources.	✓	✓				
Admin.Resources.Menu.CustomFields	Allows the user to view the custom fields page for a resource	✓	✓				
Admin.Settings	Permits access to the system configuration pages for the Learning Management System.	✓	✓				
Admin.Settings.ChangeLicence	Allows the user to apply a new licence key to the LMS	✓					
Admin.Settings.Menu.Audit	Allows the user to access the audit settings section of system configuration.	✓					
Admin.Settings.Menu.Catalogue	Allows the user to access the catalogue settings section of system configuration.	✓					
Admin.Settings.Menu.Category	Allows the user to access the category settings section of system configuration.	✓					
Admin.Settings.Menu.CustomFields	Allows the user to access the custom field settings section of system configuration.	✓					
Admin.Settings.Menu.Email	Allows the user to access the email settings section of system configuration.	✓					
Admin.Settings.Menu.Event	Allows the user to access the event settings section of system configuration.	✓					
Admin.Settings.Menu.ExternalSystems	Allows the user to access the external system settings section of system configuration.	✓					
Admin.Settings.Menu.Navigation	Allows the user to access the navigation settings section of system configuration.	✓					
Admin.Settings.Menu.Other	Allows the user to access the other settings section of system configuration.	✓					



Permission	Description	LA	TC	MT	T	M	S
Admin.Settings.Menu.OtherLearningCategory	Allows the user to access the other learning category section of system configuration.	✓					
Admin.Settings.Menu.Reports	Allows the user to access the reports settings section of system configuration.	✓					
Admin.Settings.Menu.Roles	Allows the user to access the roles settings section of system configuration.	✓					
Admin.Settings.Menu.Theme	Allows the user to access the theme settings section of system configuration.	✓	✓				
Admin.Settings.Menu.UserInformation	Allows the user to access the user information settings section of system configuration.	✓					
Admin.Settings.ShowAll	Allows the user to edit the Path.Application, Path.Content and Path.Web settings on the other settings section of system configuration.						
Admin.Themes.Create	Allows the user to create new themes.	✓	✓				
Admin.Themes.Delete	Allow the user to delete a theme	✓	✓				
Admin.Themes.Details.Edit	Allow the user to edit details for a theme	✓	✓				
Admin.Users.Accreditations.Delete	Allows the user to remove accreditations from users.	✓	✓				
Admin.Users.Administered	Gives primary group administrators the same edit permissions as group managers.						
Admin.Users.All	Allows the user to view all user records. Normally, a user can only view user records for users they are a manager for.	✓	✓				
Admin.Users.Create	Allows the user to create user accounts	✓	✓				
Admin.Users.Delete	Allows the user to delete user accounts.	✓	✓				
Admin.Users.Details.Edit	Allows the user to edit existing user accounts.	✓	✓	✓		✓	



Permission	Description	LA	TC	MT	T	M	S
Admin.Users.Details.Edit.Approver	Allows the user to change the approver for a user.	✓	✓	✓		✓	
Admin.Users.Details.Edit.Domain	Allows the user to set the domain of a user.	✓					
Admin.Users.Details.Edit.IgnoreRequired	Allows the user to override the required field settings on the user details page.	✓	✓				
Admin.Users.Details.Edit.ImportKey	Allows the user to edit the import key on the user information page.						
Admin.Users.Details.Edit.IsEnabled	Allows the user to enable or disable a user account.	✓	✓	✓		✓	
Admin.Users.Details.Edit.JobProfile	Allows the user to change the job profile for a user.	✓	✓	✓		✓	
Admin.Users.Details.Edit.LeaveDate	Allows the user to changes a user's leaving date.	✓	✓	✓		✓	
Admin.Users.Details.Edit.LMSRole	Allows the user to set the LMS role of a user.	✓	✓				
Admin.Users.Details.Edit.PMB	Allows the user to enable or disable the personal message board for a user.	✓	✓	✓		✓	
Admin.Users.Details.Edit.PrimaryGroup	Allows the user to change the primary group for a user.	✓	✓	✓		✓	
Admin.Users.Details.Edit.StartDate	Allows the user to change a user's start date.	✓	✓	✓		✓	
Admin.Users.Details.Edit.Theme	Allows the user to change the theme for a user.	✓	✓	✓		✓	
Admin.Users.Details.Edit.TrainingLocation	Allows the user to change a user's preferred training location.	✓	✓	✓		✓	
Admin.Users.ImpersonateOthers	Allows the logged in user to impersonate another user that they already can administer as long as the user being impersonated has a greater or equal access level than the logged in user						
Admin.Users.Information.Edit	Allows the user to edit the additional information for user accounts.	✓	✓	✓		✓	



Permission	Description	LA	TC	MT	T	M	S
Admin.Users.Information.IgnoreRequired	Allows the user to override the required field settings on the user information page.	✓	✓				
Admin.Users.Managed	Allows the user to view and edit details for users they are a manager for.			✓		✓	
Admin.Users.Menu.Accreditations	Allows the user to view the Administration:Accreditation page	✓	✓	✓		✓	
Admin.Users.Menu.Catalogues	Allows the user to access the catalogues page when they select a user from the user list.	✓	✓	✓		✓	
Admin.Users.Menu.CourseAdmins	Allows the user to access the courses:admin page when they select a user from the user list.	✓	✓	✓		✓	
Admin.Users.Menu.Courses	Allows the user to access the courses page when they select a user from the user list.	✓	✓	✓		✓	
Admin.Users.Menu.CpdProgrammes	Allows the user to view the the CPD Programme/Period assignments for a user.	✓	✓	✓		✓	
Admin.Users.Menu.EventBooking	Allows the user to access the event booking page when they select a user from the user list.	✓	✓	✓		✓	
Admin.Users.Menu.GroupAdmins	Allows the user to access the group:admin page when they select a user from the user list.	✓	✓	✓		✓	
Admin.Users.Menu.Groups	Allows the user to access the group:member page when they select a user from the user list.	✓	✓	✓		✓	
Admin.Users.Menu.Information	Allows the user to access the Information page when they select a user from the user list	✓	✓	✓		✓	
Admin.Users.Menu.JobProfiles	Allows the user to access the job profiles page when they select a user from the user list	✓	✓	✓		✓	



Permission	Description	LA	TC	MT	T	M	S
Admin.Users.Menu.OtherLearning	Allows the user to access the other learning page when they select a user from the user list.	✓	✓	✓		✓	
Admin.Users.Menu.Reports	Allows the user to access the reports page when they select a user from the user list	✓	✓	✓		✓	
Admin.Users.Menu.Results	Allows the user to access the results page when they select a user from the user list	✓	✓	✓		✓	
Admin.Users.Menu.SendEmail	Allows the user to access the send email page when they select a user from the user list	✓	✓	✓		✓	
Admin.Users.Results.Edit	Allows the user to edit user's results.	✓	✓	✓		✓	
Admin.Users.SendEmail	Allows the user to send an email to users.	✓	✓	✓		✓	
Admin.Users.SendEmail.View	Allows the user to access the send email page when they select a user from the user list	✓	✓	✓		✓	
OtherLearning.Create	Allows a user to create an "Other Learning" record.	✓	✓	✓	✓	✓	✓
OtherLearning.Delete	Allows a user to delete an "Other Learning" record.	✓	✓	✓	✓	✓	✓
OtherLearning.Documents.Create	Allows a user to upload a document to associate with an "Other Learning" record.	✓	✓	✓	✓	✓	✓
OtherLearning.Documents.Delete	Allows a user to delete the document associated with an "Other Learning" record.	✓	✓	✓	✓	✓	✓
OtherLearning.Edit	Allows a user to edit an "Other Learning" record.	✓	✓	✓	✓	✓	✓
Reports.Admin.EventCosts	Permits access to the event costs report.	✓	✓				
Reports.Admin.EventRegister	Permits access to the event register report.	✓	✓				
Reports.ApplyEnrolmentFilter	Restricts the information retrieved by the training reports, only retrieving information for course enrolments where the enrolment filter is the same as the user running the report.						



Permission	Description	LA	TC	MT	T	M	S
Reports.AuditLog	Permits access to the audit log reports.	✓					
User.Events.Book	Allows a user to book on to an event	✓	✓	✓	✓	✓	✓
User.MyDetails.Edit	Allows a user to edit their own details from the “My details” link on the system navigation toolbar.	✓	✓	✓	✓	✓	✓
WEBI.UserGroup.LMSAdministrators	Adds a user to BusinessObjects LMSAdministrators group to allow access to administrative interactive reports. Removes user from LMSStudents group if present.	✓	✓	✓	✓	✓	
WEBI.UserGroup.LMSStudents	Adds a user to the BusinessObjects LMSStudents group and removes user from LMSAdministrators group if present.						✓
WEBI.UserGroup.QueryEditors	Adds a user to the BusinessObjects QueryEditors group to allow users to edit BusinessObjects queries. User is removed from the QueryEditors group if this ACL is not present.	✓					
WEBI.Users.ShowAll	Allows a user to see all other users in the interactive reports.	✓	✓				



