


Chapter 2: Roles and Permissions

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Administrator, Coordinator, and Facilitator Roles



In the **Event Scheduling** module, the roles of **Event Administrator**, **Coordinator**, and **Facilitator** operate at different levels of responsibility, but they work together to ensure that events are successfully planned, delivered, and recorded.

In practical terms:

- The **Event Administrator** ensures the event exists and is properly managed in the system,
- The **Coordinator** ensures it is properly organised, and
- The **Facilitator** ensures it delivers value to attendees.

Let us look at some key differences in their roles.

Event Administrator

The Event Administrator operates at a **system and governance level**. This role is responsible for configuring and managing the module itself, rather than running the event on the ground.

The Event Administrator is responsible for the following:

- Activating the module and assigning permissions
- Configuring master data such as venues, categories, and people groups
- Creating and managing events in the system
- Controlling bookings, approvals, and workflows
- Capturing attendance, completion status, and costs
- Maintaining records for reporting, compliance, and audits

Coordinator

The Coordinator operates at both the **planning and operational levels**. This role focuses on making sure the event is properly arranged and runs smoothly from a logistical perspective.

The Coordinator plays an important role in the following tasks:

- Organising event details, including the schedule, venue, and setup
- Overseeing arrangements before and during the event
- Ensuring everything is in place for the session to run smoothly
- May view reports or historical data only if they have been given access to the [Report Builder](#) module.

Facilitator

The Facilitator operates at a **delivery and interaction level**. This role is responsible for running the session and engaging with attendees.

Facilitators are responsible for the following:

- Leading the session or training
- Guiding discussions and activities
- Keeping the session on track
- Ensuring learning or event objectives are achieved

To see how these roles integrate into the **Event Scheduling** module, please read the section explaining [How Event Scheduling Works](#).

Employee and Managerial Roles



While the event administrator, coordinator, and facilitator roles support different stages of the event lifecycle, from setup to delivery to tracking, the process is carried out through the involvement of managers and employees, who drive participation and governance.

- The **event administrator** configures the module, creates events, and manages bookings and data.
- The **coordinator** then ensures that all logistical arrangements are in place.
- The **facilitator** delivers the event and engages attendees during each session.
- **Employees** interact with the process by discovering events, submitting booking requests, and attending sessions.
- **Managers** provide oversight by approving or declining bookings where required.

Together, these roles form a continuous lifecycle in which events are **planned, approved, delivered, attended**, and ultimately **recorded**.

Let us explore the roles of managers and employees in more detail.

Employees

Employees are primarily the **module's attendees** or **end users** of the **Event Scheduling** module. They can view events that have been made visible on the end-user calendar, book themselves onto events, and submit a booking request with a motivation. If approval is not required, their booking is confirmed immediately. If approval is required, the booking remains in an **Awaiting Approval** state until it is actioned. Once successfully booked, they also receive a QR code by email that can be used for attendance scanning.

Employees **cannot** configure the module, manage master data, create events, assign permissions, record attendance, or approve other people's bookings. Those tasks belong to administrators and workflow approvers. Employees can only book events that are activated for booking and visible in the calendar.

Managers

Managers can act as **approvers** when an event booking requires manager approval. If manager approval is enabled, the request is sent to the person's training manager, provided the reporting line has been populated. Managers then use the system's **HR Processes** functionality to approve or decline it.


Managers **are not** responsible for setting up the module, creating events, configuring master data, or capturing attendance unless they have also been given administrator rights. In other words, being a manager grants approval authority within the workflow but not full administrative control of the module. Additionally, managers may view reports or historical data only if they have been given access to the [Report Builder](#) module.

In simple terms

Employees can **request and attend** events. Managers can **review and approve or decline** those requests when approval is required. Administrators do everything else, including setup, event creation, attendance management, and overall module administration.



How Event Scheduling Works



Based on the guide and the role definitions we have already established, **Event Scheduling** operates as a controlled lifecycle that progresses from setup to booking to delivery to attendance capture and finally to completion reporting. The exact flow depends on whether the event requires administrator approval, manager approval, or no approval at all.

Let us take a look at each of the following scenarios you may encounter when using the **Event Scheduling** module, and the roles played by the administrator, coordinator, facilitator, manager, and employee:

- An event that requires an **administrator's approval**.
- An event that requires the **manager's approval**.
- An event where **no approval** is required.

Administrator approval is required

Scenario: A company creates an internal development session, but only an Event Scheduling Administrator may approve attendance requests.

The administrator prepares the module and event.

The administrator activates the module if needed, ensures the right permissions are in place, configures the master data, and creates the event in Event Scheduling. They set the event status to confirmed, add the relevant sessions, link the training intervention if required, and make the event visible on the calendar so employees can book it. They also set the requirement for administrator approval.

The coordinator prepares the event operationally.

The coordinator ensures the practical arrangements are in place, including the venue, room, timing, session setup, and any logistical details to be managed before the event.

The facilitator prepares to deliver the session.

The facilitator is assigned to the session and focuses on delivery, ensuring the content, discussion, and participant engagement are ready for the session date.

The employee submits a booking request.

The employee sees the event in the calendar, clicks to book, and submits a booking request with the required motivation. Because approval is required, the booking does not go through immediately and remains pending.

The administrator reviews the request.

The Event Scheduling Administrator checks the request and either approves or declines it. If approved, the employee is added to the attendee list. If declined, the employee is not booked onto the event.

The event takes place.

The coordinator supports logistics on the day, while the facilitator runs the session. If the event uses QR codes, a booked attendee can scan the code to log their attendance.

The administrator records attendance and completion.

After the session, the administrator updates per-session attendance, records the overall completion status, and captures competency information where applicable. If there are costs, they can also be recorded against attendees.

Responsibilities in this story

- **Administrator:** creates the event, configures approval, approves or declines bookings, records attendance and completion, and maintains the event record.
- **Coordinator:** manages the practical setup and logistics.
- **Facilitator:** delivers the event.
- **Employee:** submits a booking request and attends once approved.
- **Manager:** not involved in the approval path in this scenario.

Manager approval is required

Scenario: A compliance or development event must be approved by the employee's training manager before the employee may attend.

The administrator configures the event and workflow.

The administrator sets up the event in Event Scheduling, ensures the relevant training intervention and master data are in place, and links the booking process to an HR workflow that requires manager approval. The guide notes that the training manager reporting line must be populated for each person for this to work correctly.

The coordinator prepares the logistics.

The coordinator ensures the venue, room, sessions, and event details are ready. If the event runs over more than one day, multiple sessions can be created.

The facilitator is assigned to lead the event.

The facilitator is linked to the session and prepares to host and guide the event flow.

The employee submits a booking request.

The employee books themselves onto the event from the calendar view and selects a motivation from the master data list. Because manager approval is required, the request's status is Awaiting Approval.

The manager receives the request and decides.

The manager finds the request in the HR Processes approval queue and either approves or declines it. If approved, the employee becomes a confirmed attendee. If declined, the booking does not proceed.

The event is delivered.

The coordinator handles the operational side, the facilitator runs the session, and the employee attends once approved. QR codes may be used to help record attendance once the person is booked.

The administrator completes the administrative follow-up.

The administrator updates attendance records per session, captures overall completion status, and can view historical attendance or export the attendance register.

Responsibilities in this story

- **Administrator:** sets up the event, configures manager approval, monitors the event record, and updates attendance and completion data.
- **Coordinator:** ensures the logistics are ready.
- **Facilitator:** delivers the event and guides participant interaction.
- **Manager:** reviews booking requests and approves or declines them.
- **Employee:** submits the request, waits for approval, and attends after approval.

No approval is required

Scenario: A workshop is open to the relevant audience and does not require approval before booking.

The administrator creates the event and opens it for booking.

The administrator sets up the event, selects the sessions, adds the relevant master data, and enables the option that makes the event visible on the end-user calendar. No approval workflow is assigned.

The coordinator organises the event logistics.

The coordinator ensures the venue, room, timing, and arrangements are ready.

The facilitator prepares for delivery.

The facilitator is assigned to the event and gets ready to run the session on the scheduled date.

The employee books immediately.

The employee sees the event in the calendar, clicks to book, selects a motivation if required, and submits the booking. Because no approval is required, the booking is confirmed straight away.

The employee receives the normal event communications.

Once booked, the employee may receive the QR code email and any other notifications configured for the event.

The event is delivered, and attendance is captured.

The coordinator manages the operational side, the facilitator leads the event, and the administrator captures attendance and completion afterwards. Attendance can be recorded session by session, and the system can show historical attendance and completion status.

Responsibilities in this story

- **Administrator:** creates the event, makes it available for direct booking, and records attendance and completion afterwards.
- **Coordinator:** handles practical event setup.
- **Facilitator:** delivers the event.
- **Employee:** books directly and attends.
- **Manager:** not involved unless the organisation later chooses to add approval requirements.