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.



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