

LMS Roles Matrix

| Roles and Access | Portal Administrator | Administrator | Instructor | Location Administrator | Location Manager | Student |
|---|---|--|--|--|---|--|
| Accreditations | | | | | | |
| Accreditation (Search / View) | X | X | | | | |
| Accreditations (Add / Edit) | X | | | | | |
| Announcements | | | | | | |
| Send Announcements | X | Manager with subordinates have Announcement privileges scoped to learners in their purview, if Announcements is displayed on the menu. | | | | |
| Approvals | A user with subordinates has approval privileges scoped to those learners in their purview. | | | | | |
| Approve Pending Enrollments | X | X | | X | X | |
| Approve Interests | X | X | | X | X | |
| Approve Admin-Verified Self- Study Completions | X | X | | | | |
| Approve Manage-Verified Self- Study Completions | X | X | | X | X | |
| Approve Pending Self-Registrations (New User Account Requests) | X | | | | | |
| Catalog | | | | | | |
| Search Catalog | All Roles can use Search Catalog to find Courses, Learning Paths, and Resources that are included in the catalog if they are scoped to their business unit. | | | | | |
| Search Course | X | X | X | X | | |
| Courses (Add / Edit) | X | | | | | |
| Search Offerings | X | X | X | X | X | |
| Offering (Add / Edit) | X | X | X | | | |
| Roster Processing | X | X | X – If courses are assigned to the Instructor | | | |
| Enroll Others | X | X | | X | X | |
| Interests (Add / Delete) | X | X | X | X | X | |
| Review Interests Summary | X | X | X | | | |
| Learning Path (Search / Add / Edit) | X | | | | | |
| Resources (Search / Add / Edit) | X | | | | | |
| Topics (Add / Edit) | X | | | | | |
| Training Calendar | All Roles can view the Training Calendar. | | | | | |
| Teaching Schedule | | | X | | | |
| Goals | • Self assigned goals, team goals, and waive goals functionality is set at the portal level. | | | | | |
| | • A user with subordinates has add / edit goal privileges that are scoped only to those people in their purview. | | | | | |
| Goals (Add / Edit/Waive) | X | X - via My Team > Goals if enabled by portal administrator | X - Instructors can add goals for other users from Goals > +Goals but they can only get to that page if bookmarked (not on admin menu) | X - via My Team > Goals if enabled by portal administrator | X - via My Team > Goals if configured by portal administrator | X - Add Only via My Training Plan if Self-Assigned Goals is configured by portal administrator |
| My Training Plan (Add / Edit) | X | X | X | X | X | X |

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| Goal Rules | | | | | | |
| Goal Rules (Add / Edit) | X | | | | | |
| Schedule Goal Rule | X | | | | | |
| Organizations | The organizations displayed are scoped to those in the user purview. | | | | | |
| Search Organizations | X | X | X (Location Only) | | | |
| Organization (Add) | X | | | | | |
| Organization (Edit) | X | X | | | | |
| Brands (Add / Edit) | X | | | | | |
| Facilities (Add / Edit) | X | X | | | | |
| Positions (Add / Edit) | X | | | | | |
| Reports | | | | | | |
| Create Reports | X | | | | | |
| Run Reports | X | All Roles can run Reports if reports are shared with their role. Report results are scoped to position and location. | | | | |
| Schedule Reports | X | All Roles can schedule Reports if reports are shared with their role. Report results are scoped to position and location. | | | | |
| Users | | | | | | |
| Training History - (View) | X | X – view subordinates on My Team & User Search | X – view subordinates on My Team & User Search | X – view subordinates on My Team | X – view subordinates on My Team | X |
| Transcript (Add / Edit) | X | | | | | |
| Search Users | X | X | X | | | |
| Users (Add / Edit) | X | | | | | |
| Manage Users (delegated user maintenance) | X - Configure Manage Users | X - Use Manage Users | | X - Use Manage Users | | |
| Quick Profile Update | X | | | | | |
| Audience (Add / Edit) | X | | | | | |
| User Groups (Add) | X | | | | | |
| User Group (Edit) | X | X | | | | |
| User Import | X | | | | | |
| User Merge | X | | | | | |
| Transcript Import | X | | | | | |
| Instructors (Add) | X | | | | | |
| Instructor (Edit) | X | X | X | | | |
| Impersonate Users | X | | | | | |