

Setup Permission

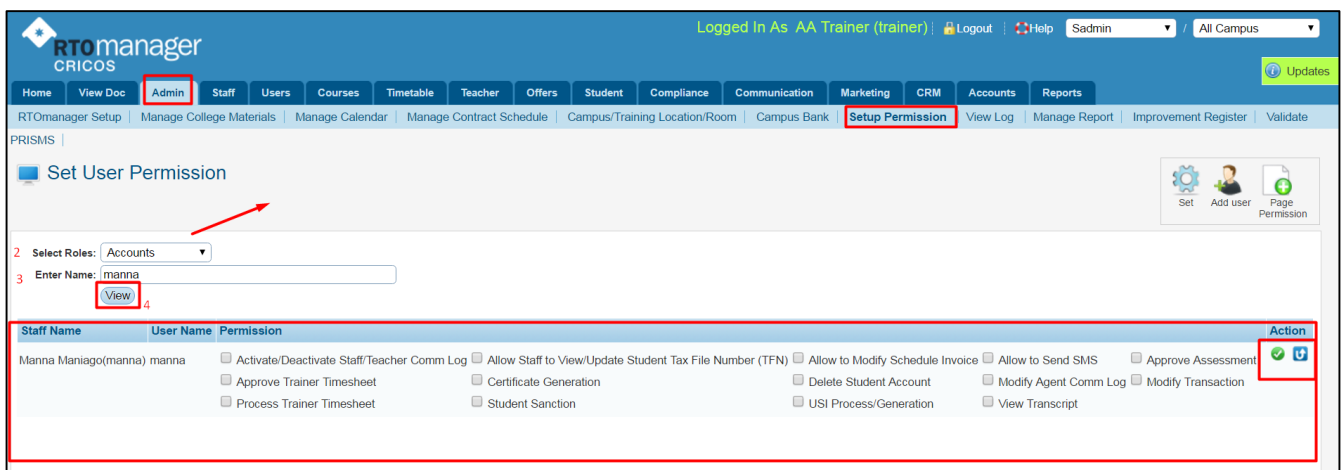
This menu allows Super administrators to allow more permission to view or deny access to selected pages or functions on top of the default role access and features (*refer to Appendix 1*).

Note: Super Administrators (SAdmins) has the right to use this function.

To set up permissions, you have to first set up the permission linking with a particular role and then later allocate or assign the users to that permission.

To perform this function, follow the instructions below:

1. On your RTOManager, Click **Admin > Setup permission**



RTOManager CRICOS

Logged In As AA Trainer (trainer) | Logout | Help | Sadmin | All Campus

Home | View Doc | **Admin** | Staff | Users | Courses | Timetable | Teacher | Offers | Student | Compliance | Communication | Marketing | CRM | Accounts | Reports

RTOManager Setup | Manage College Materials | Manage Calendar | Manage Contract Schedule | Campus/Training Location/Room | Campus Bank | **Setup Permission** | View Log | Manage Report | Improvement Register | Validate

PRISMS |

Set User Permission

2 Select Roles: Accounts

3 Enter Name: manna

View

Staff Name	User Name	Permission	Action
Manna Maniago(manna)	manna	<input type="checkbox"/> Activate/Deactivate Staff/Teacher Comm Log <input type="checkbox"/> Approve Trainer Timesheet <input type="checkbox"/> Process Trainer Timesheet	<input type="checkbox"/> Allow Staff to View/Update Student Tax File Number (TFN) <input type="checkbox"/> Certificate Generation <input type="checkbox"/> Student Sanction


2. Select **Role type** from the dropdown menu

3. Type in Staff name on the field available

4. Click **View**.

5. Tick the permission box applicable and click this icon  to update permission setup.

Note: A pop up message will appear to confirm permission setup update

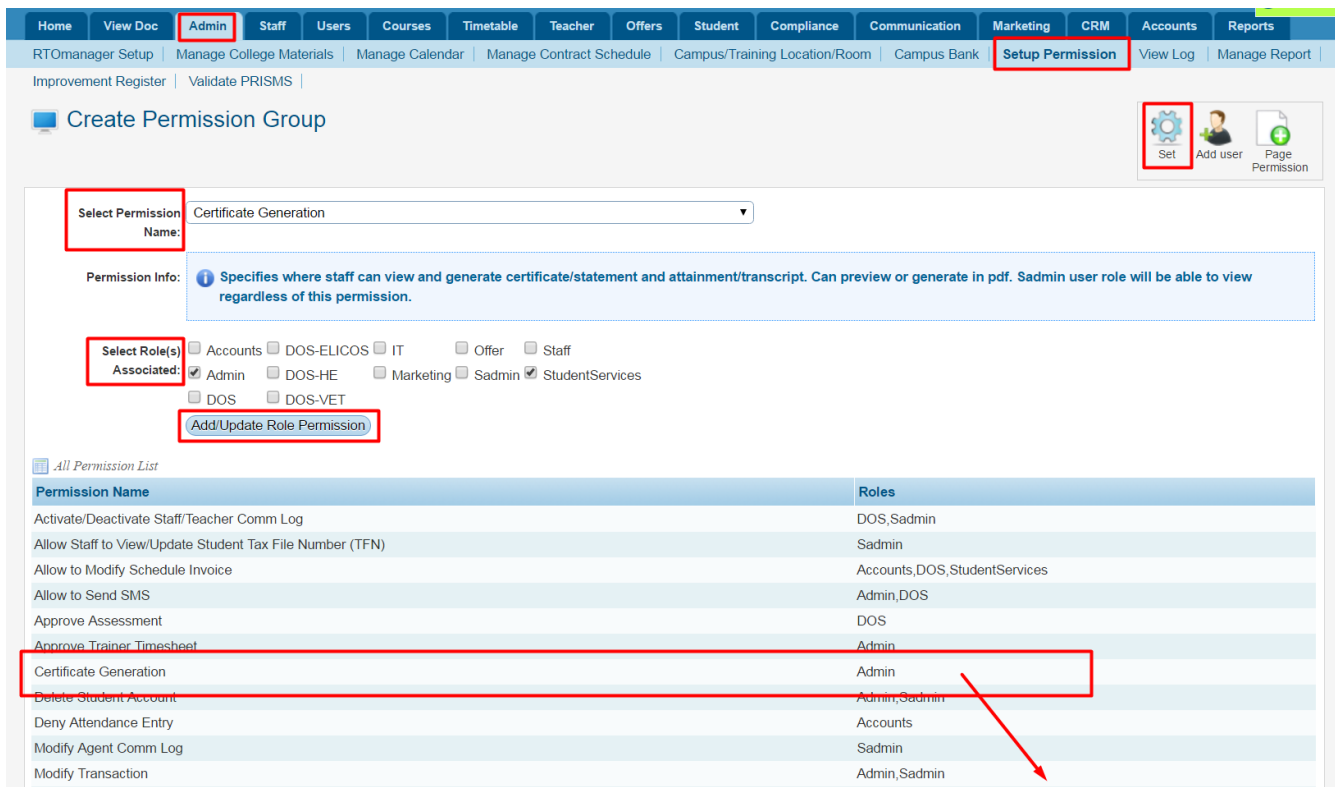
 User permission is updated successfully for Manna Maniago(manna)

Create Permission Group

RTOManager has the flexibility to create permission groups should you need to provide extra permissions per role. Note that each role has designated access and permissions depending on their function. Extra permissions can be added as required.

To manage this function, follow the instruction below:

1. On your RTOManager, click **Admin > Setup Permission > Set**
2. Select Permission name from the drop down menu
3. Tick the box with role associated with the permission set up.
4. Click **Add/ Update Role Permission**.



Permission Name	Roles
Activate/Deactivate Staff/Teacher Comm Log	DOS, Sadmin
Allow Staff to View/Update Student Tax File Number (TFN)	Sadmin
Allow to Modify Schedule Invoice	Accounts, DOS, StudentServices
Allow to Send SMS	Admin, DOS
Approve Assessment	DOS
Approve Trainer Timesheet	Admin
Certificate Generation	Admin
Delete Student Account	Admin, Sadmin
Deny Attendance Entry	Accounts
Modify Agent Comm Log	Sadmin
Modify Transaction	Admin, Sadmin

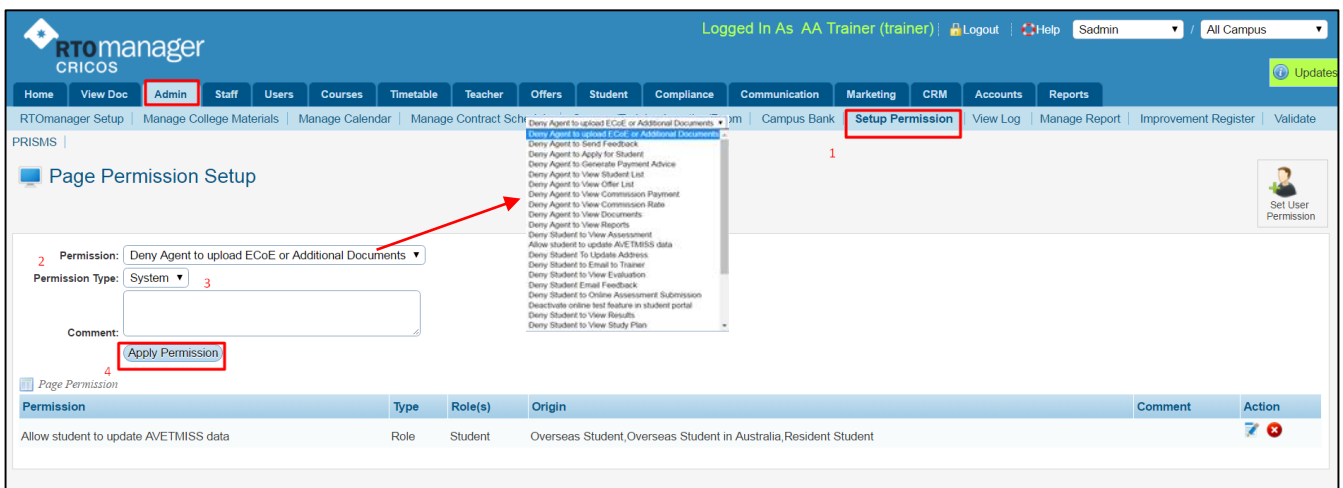
Note: As a system default, only Admin roles can generate student certificates. However, as per the example provided, SAdmin has granted student services permission to do 'Certificate Generation'. This means that Student services staff can also do this function in the system.

Page Permission

Page permission are different to earlier permission as this provides a facility to control the Agent Portal or Student Portal by SAdmin user.

Note that this a **system –wise permission**. With this option, you can select the permission and hide pages from Agent or Student Portal as per your requirements. This option allows you to better manage what the external users will be able to view with their login. To manage this function, follow the instructions below:



1. On your RTOManager, Click **Admin > Setup Permission > Page Permission**



The screenshot shows the RTOManager Admin interface. The 'Admin' menu is selected, and the 'Setup Permission' option is highlighted. The 'Page Permission Setup' form is visible, with the following fields:

- Permission: Deny Agent to upload ECoE or Additional Documents
- Permission Type: System
- Comment: (empty)
- Apply Permission button



A dropdown menu is open, showing a list of permissions. The 'Deny Agent to upload ECoE or Additional Documents' option is selected. Below the form, a table displays existing permissions:

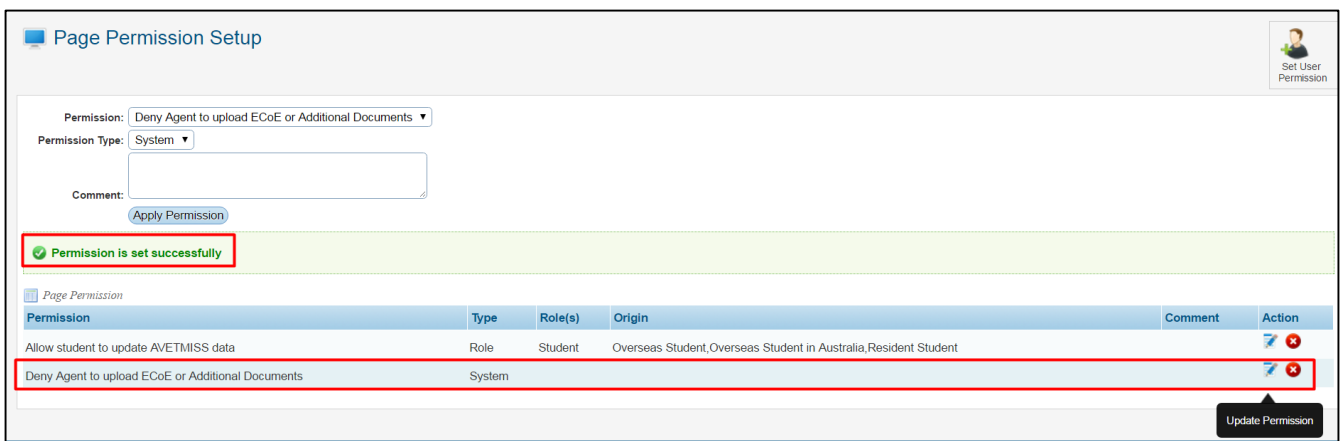
Permission	Type	Role(s)	Origin	Comment	Action
Allow student to update AVETMISS data	Role	Student	Overseas Student, Overseas Student in Australia, Resident Student		 

2. Select Permission name from the drop down menu.





3. Select **permission type** –e.g. System or role (*roles are limited to student and agent portal only*).

4. Click **Apply Permission**.

Note: The page permission you have set up will appear at the bottom of the page. As per example below, permission has been set up to *Deny agent to upload ECoE or additional documents*. You may update permission by clicking edit/ delete icon  .



The screenshot shows the RTOManager Admin interface after the permission has been successfully set up. The 'Page Permission Setup' form is visible, and a green message box indicates: **Permission is set successfully**. Below the form, a table displays existing permissions:

Permission	Type	Role(s)	Origin	Comment	Action
Allow student to update AVETMISS data	Role	Student	Overseas Student, Overseas Student in Australia, Resident Student		 
Deny Agent to upload ECoE or Additional Documents	System				 

An 'Update Permission' button is visible at the bottom right of the table.

Appendix 1

RTOManager User role menu & Feature access

User Role Name	Portal Menu Access	Details	Special Feature Access
Accounts	Manage Profile	view and Change profile details	
	View Doc	View documents	
	Accounts	Manage student fees, agent payment, finance activities	
	Reports	View reports, generate letters	
Admin	Manage Profile	view and Change profile details	Document Mgm
	View Doc	View documents	Course Material Mgm
	Admin	set up tasks	Class Enrolment Mgm
	Staff	manage staff account	AVETMISS Reporting, VSN, CQR (WA)
	Users	user management	NVR Reporting
	Courses	course management	VET Fee Help
	Timetable	view and manage timetable	
	Teacher	manage trainer, matrix	
	Offers	Enrolment management	
	Student	Student management	
	Compliance	All compliance menus	
	Communication	News/Events, Mailing List, SMS list, Survey	
	Marketing	manage agent, commission setup, mailing list	
	Accounts	Manage student fees, agent payment, finance activities	
Reports	View reports, generate letters		
DOS	Manage Profile	view and Change profile details	Document Mgm
	View Doc	View documents	Course Material Mgm
	Timetable	view and manage timetable	Class Enrolment Mgm
	Teacher	manage trainer, matrix	
	Student	Student management	
	Compliance	All compliance menus	
	Communication	News/Events, Mailing List, SMS list, Survey	
	Reports	View reports, generate letters	
IT	Manage Profile	view and Change profile details	
	View Doc	View documents	
	Users	manage user accounts	
	Reports	View reports, generate letters	

Marketing	Manage Profile	view and Change profile details	
	View Doc	View documents	
	Marketing	manage agent, commission setup, mailing list	
	Reports	View reports, generate letters	
Sadmin	The same as Admin		The same as Admin
	Setup Permissions	set up additional permissions	
	Add New or Edit Letter	set up letter content	
	Add/Edit Email Template	set up email template, sms template	
Student Services	Manage Profile	view and Change profile details	
	View Doc	View documents	
	Offers	Enrolment management	
	Student	Student management	
	Compliance	All compliance menus	
	Communication	News/Events, Mailing List, SMS list, Survey	
	Reports	View reports, generate letters	
Teacher	Manage Profile	Can view & do teacher related tasks	Manage Course Materials
	View Doc		
	Result Management		
	View Timetable		
	Attendance Entry		
	Communication		
	Course Materials		
	Timesheet		
	Traineeship Activity		
	Reports		View reports
Campus managerⁱ* (optional)	Manage Profile	view and Change profile details	Access to Setup Venue for the Campus
	View Doc	View documents	Set up Intake dates for the Campus
	Timetable	view and manage timetable	
	Teacher	manage trainer, matrix	
	Student	Student management	
	Compliance	All compliance menus	
	Communication	News/Events, Mailing List, SMS list, Survey	
	Reports	View reports, generate letters	
	Admin	Administration tasks	
	Courses	Course management	
Offer	Offers management		

* this role is only available if Multi Campus Module is activated.

