

Assigning certification learners

The **Assignments** section is used to select those learners who should complete the certification. Users can be assigned by organisation, position, audience, management hierarchy, and/or individually.

Once learners are assigned to a certification, they will be provided access to enrol in each selected course.

OVERVIEW DETAILS CONTENT **ASSIGNMENTS** MESSAGES CERTIFICATION EXCEPTION REPORT (0)

Add...

FILTER

! No results

Recently added

TYPE

Organisation

Position

Audience

Individual

Manager

Assigning by organisation

1. While editing the certification, open the **Assignments** tab.
2. Select **Organisations** from the **Add...** dropdown menu.
3. **Browse** through the organisations or **Search** for a specific organisation.
4. Click on the name of each organisation to be added.
5. The selected organisation(s) appear under the **Items to add** area.
6. Click **OK** to complete the organisation selection or **Cancel** to exit.

Organisations from different frameworks can be selected. A delete icon to remove an organisation from the selection will appear on hover over.

Add organisations to program

HQ
 Finance
 Accounts Payable
 HR

Items to add

Accounts Payable
HR

You can then select **Include all below** to include all users in the hierarchy structure below the selected organisation. Additionally you can enter an [due date](#) as described below.

OVERVIEW DETAILS CONTENT **ASSIGNMENTS** MESSAGES CERTIFICATION EXCEPTION REPORT (0)

Add... Search assignments

FILTER	Name	Due date settings	Actual due date	Number of learners	Actions
Recently added	HR Organisation	<input type="checkbox"/> Include all below	View dates	0	<input type="checkbox"/>
	Finance Organisation	<input checked="" type="checkbox"/> Include all below	Complete within 1 Year(s) of First login <input type="checkbox"/> <input type="checkbox"/>	View dates	1 <input type="checkbox"/>

TYPE

- Organisation
- Position
- Audience
- Individual
- Manager

Assigning by position

1. While editing the certification, open the **Assignments** tab.
2. Select **Positions** from the **Add...** dropdown menu.
3. **Browse** through the positions or **Search** for a specific position.
4. Click on the name of each position to be added.
5. The selected position(s) appear under the **Items to add** area.
6. Click **OK** to complete the position selection or **Cancel** to exit.

[Positions](#) from different frameworks can be selected. A delete icon to remove a position from the selection will appear on hover over.

Add position to program

BROWSE SEARCH

CTO
...Head of Development

CFO
...Accountant

Items to add

Head of Development
CTO

You can then select **Include all below** to include all users in the hierarchy structure below the selected position. Additionally you can enter an [due date](#) as described below.

OVERVIEW DETAILS CONTENT ASSIGNMENTS MESSAGES CERTIFICATION EXCEPTION REPORT (0)

Add... Search assignments

FILTER	Name	Due date settings	Actual due date	Number of learners	Actions
Recently added	CTO Position	<input checked="" type="checkbox"/> Include all below	View dates	1	✘
	Accountant Position	<input type="checkbox"/> Include all below	Complete by 31 Mar 2020 at 00:00 ✎ ✘	View dates	3 ✘

TYPE

- Organisation
- Position
- Audience
- Individual
- Manager

Assigning by audience

1. While editing the certification, open the **Assignments** tab.
2. Select **Audiences** from the **Add...** dropdown menu.
3. **Browse** through the audiences or **Search** for a specific audience.
4. Click on the name of each audience to be added.
5. The selected audience(s) appear under the **Items to add** area.
6. Click **OK** to complete the audience selection or **Cancel** to exit.

A delete icon to remove an audience from the selection will appear on hover over.

Add audiences to program ✘

BROWSE SEARCH

- Fire marshals
- New staff
- New Zealand office
- UK office

Items to add

- New staff
- UK office ✘

Ok Cancel

Additionally you can enter an [due date](#) as described below.

Add... Search assignments

FILTER	Name	Due date settings	Actual due date	Number of learners	Actions
Recently added	UK office Audience		View dates	3	
	New Zealand office Audience		View dates	3	

TYPE

- Organisation
- Position
- Audience
- Individual
- Manager

To learn more about creating audiences, please see [Audiences](#).

Learning will be made available immediately to new users once their account has been registered.

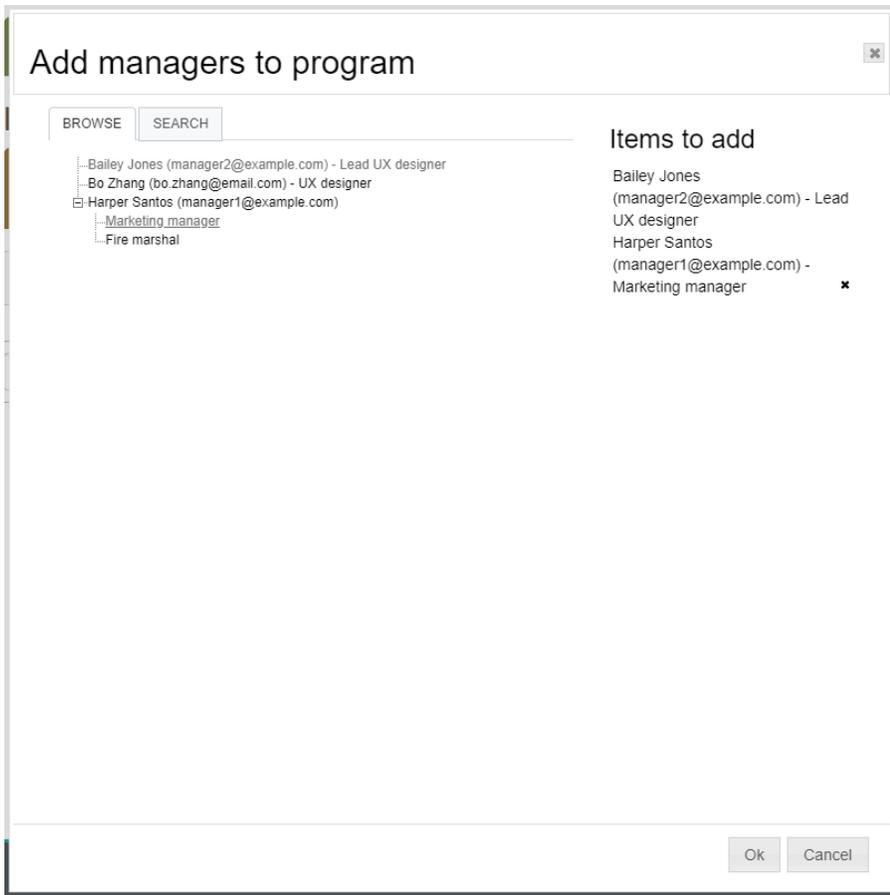
Audience membership as well as audience-based enrolled learning will occur before new users first log into the platform.

For existing users, audience membership and enrolment when the certification user assignment [scheduled task](#) is run.

Assigning by management hierarchy

1. While editing the certification, open the **Assignments** tab.
2. Select **Management hierarchy** from the **Add...** dropdown menu.
3. **Browse** through the managers or **Search** for a specific manager.
4. Click on the name of each manager to be added.
5. The selected managers appear under the **Items to add** area.
6. Click **OK** to complete the manager selection or **Cancel** to exit.

A delete icon to remove a manager from the selection will appear on hover over.



Once a management hierarchy has been added in the table of existing assignments there will be a dropdown menu where you can choose either:

- **Include all below** to include all users in the hierarchy structure below the selected management position
- **Include direct team** to add the manager's direct reports only

Additionally you can enter an [due date](#) as described below.

OVERVIEW	DETAILS	CONTENT	ASSIGNMENTS	MESSAGES	CERTIFICATION	EXCEPTION REPORT (0)
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Add... ▾

🔍

FILTER	Name	Due date settings	Actual due date	Number of learners	Actions
Recently added	Bailey Jones - Lead UX designer Manager	<input type="text" value="Include direct team"/> ▾	Complete within 1 Year(s) of Program enrollment date 📅	View dates	1 ✖
TYPE	Harper Santos - Marketing manager Manager	<input type="text" value="Include all below"/> ▾	Complete by 31 Oct 2020 at 00:00 📅 ✖	View dates	1 ✖
Organisation					
Position					
Audience					
Individual					
Manager					

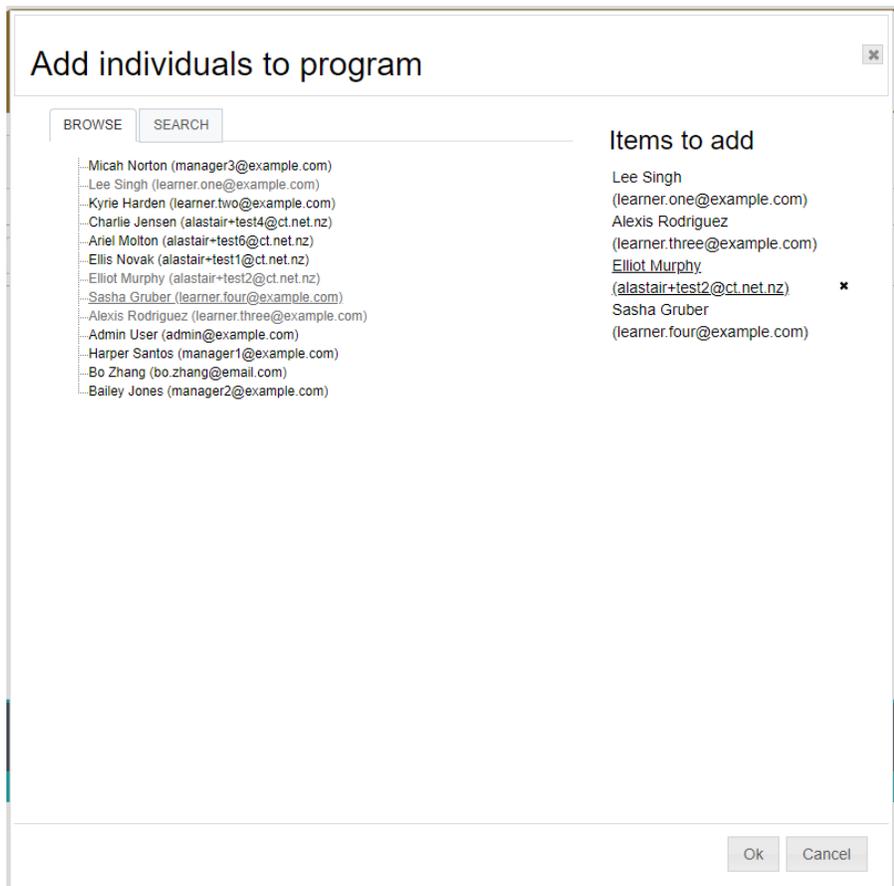
Please see [Job assignments](#) for more information.

Assigning individual users

1. While editing the certification, open the **Assignments** tab.
2. Select **Individuals** from the **Add...** dropdown menu.
3. **Browse** through the users or **Search** for a specific user.
4. Click on the name of each user to be added.
5. The selected users appear under the **Items to add** area.

6. Click **OK** to complete the user selection or **Cancel** to exit.

A delete icon to remove an individual from the selection will appear on hover over.



Additionally you can enter an [due date](#) as described below.



FILTER	Name	Due date settings	Actual due date	Number of learners	Actions
Recently added	Micah Norton Individual		No due date	1	
	Lee Singh Individual		No due date	1	
TYPE	Ellis Novak Individual		No due date	1	
	Charlie Jensen Individual		09 Jul 2020 at 15:05	1	
Audience	Individual				
	Manager				

Assignment due date

The due date for users enrolled in the certification via any of the assignment types, must be set using a fixed completion date or using a time relative to one of the following events:

- **First login:** Relative to the users first log in to the system.
- **Position assigned date:** Relative to the time a position was assigned to any of the users job assignments with the specified position
- **Job assignment start date:** Relative to the start date field of any of the users job assignments with the specified position
- **certification completion:** Relative to the time another specified certification or certification was completed by the user
- **Course completion:** Relative to the time a specified course was completed by the user
- **Profile field date:** Relative to the value of a date/time custom field in the users profile

- **certification enrolment date:** Relative to the time a user was enrolled in this certification

Completion criteria ✕

Complete by at :

or

Complete within of

- ✓ First login
- Position assigned date
- Job assignment start date
- Program completion
- Course completion
- Profile field date
- Program enrollment date

An **Assignment due date** will be assigned to other users as they join the group. The actual due date cannot be changed if the user has already completed the certification.

Users' actual due dates may differ from the assignment due date for various reasons, including:

- If another assignment type includes the same user, the other assignment due date may override this one
- If this assignment has a relative due date, which is not yet applicable to the user
- A user may have been granted an extension by a manager
- If an exception occurred and the **Set realistic time allowance** action was used to resolve it
- This assignment due date may have changed, but the user still has the due date that was originally given to them
- This is a certification, and the due date has automatically been set to the expiration date

Prior to saving changes, it is important that consideration is given to assigning a completion date relative to a user's due date. Please see [Managing certifications](#) for more information.

Actual due date

After using the **Assignment due date** option to assign a due date to the group of users and saving all changes, the **Actual due date** column will display a link to view the specific due date for all users enrolled in the certification using the corresponding assignment type.

Searching and filtering

If you would like to find a particular certification assignment to edit (remove) or adjust/set the due date () then you can search or filter for a particular assignment.

To search simply type the search term into the box in the top right of the assignments table then click the magnifying glass icon () or press the return key on your keyboard.

Filtering

You can filter the reports by type (e.g. organisation, position, individual etc.) or by **Recently added** (any assignments added during this login session).

When using the type filters there is an 'and' logic, meaning that if **Organisation** and **Manager** are both selected as filter criteria the table will show results for both of these types.

Legacy program/certification assignment interface

As a Site Administrator you can switch between the view described on this page and the old certification assignment interface.

1. Navigate to *Quick-access menu > Configure features > Learn settings*.
2. Tick **Enable legacy program assignment interface** (to enable, or untick this to disable).
3. Click **Save changes**.

This setting will be enabled by default on any existing sites upgrading to version 12.7+.

For new installations this will be disabled by default.

Assigning users to multiple certifications which contain some matching course content

This scenario is not recommended when managing certifications due to the potential this creates for users needing to re-complete the course that is contained in both certifications.

Where two or more certifications contain some matching course content, assigning a user to one certification and then adding the same user to another different certification will result in an **Exception** being created for this user. For more information please see [Exception Reports](#).

These exceptions shouldn't be ignored/dismissed as they are a warning that user's with these exceptions may have course progress reset and may need to repeat the courses contained within more than one certification they are assigned to.

Assigning a user to multiple certifications which all have the same courses creates a likelihood for the overlapping of window opening dates and the archiving of course completions on certifications which are already in progress.

Totara Academy



The Totara Academy has a whole course dedicated to using [Programs and certifications](#) in Totara Learn. Here you can learn more on how to use programs and certifications, see best practice, and give it a go yourself.

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