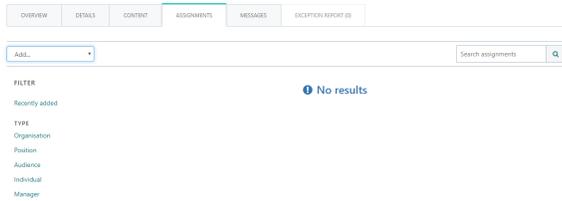


Assigning learners

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

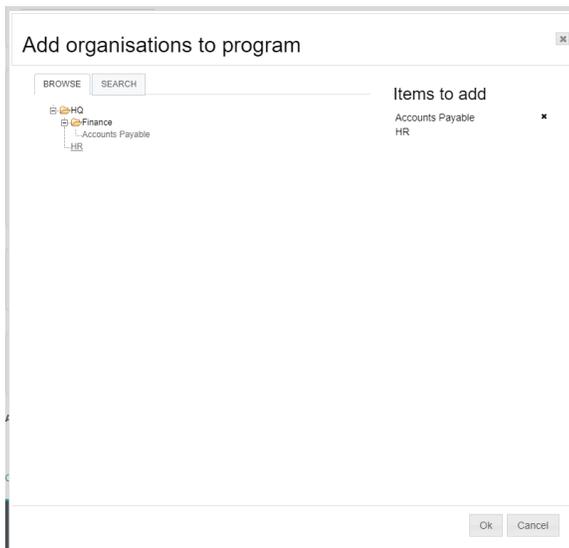
Once learners are assigned to a program, they will be provided access to enrol in each selected course.



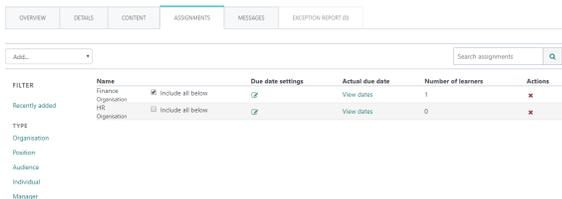
Assigning by organisation

1. While editing the program, 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.



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.



Assigning by position

1. While editing the program, 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.

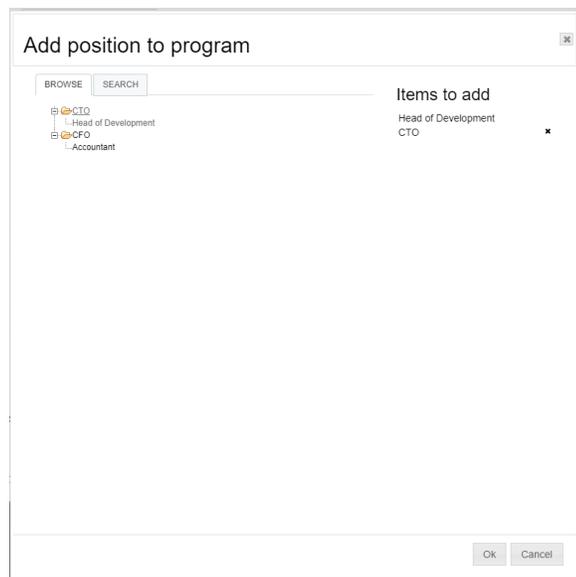
On this page

- [Assigning by organisation](#)
- [Assigning by position](#)
- [Assigning by audience](#)
- [Assigning by management hierarchy](#)
- [Assigning individual users](#)
- [Assignment due date](#)
- [Actual due date](#)
- [Searching and filtering](#)
 - [Filtering](#)
- [Advanced features](#)

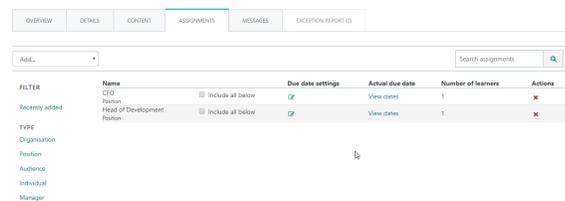


The Totara Academy has a whole course dedicated to using [Programs and certifications](#) in Totara Learn. Here you can learn more on how to use programs and certifications, see best practice, and give it a go yourself.

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



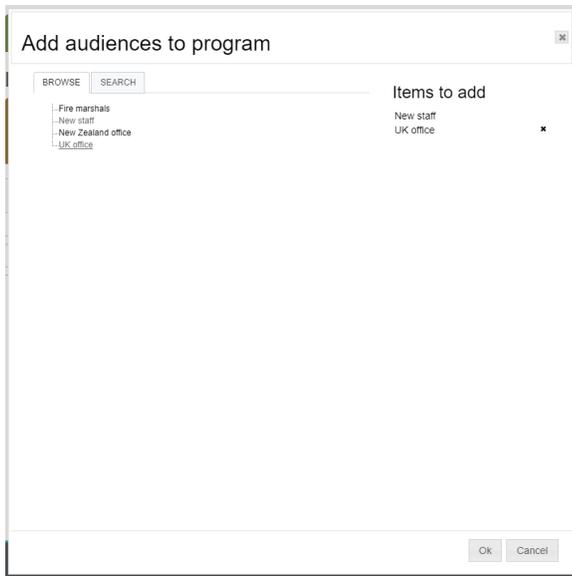
You can then select **Include all below** to include all users in the hierarchy structure below the selected position. Additionally you can enter an **due date** as described below.



Assigning by audience

1. While editing the program, 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.



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

ASSIGNMENTS					
Add...					
	Name	Due date settings	Actual due date	Number of learners	Actions
	New staff	<input checked="" type="checkbox"/>	View dates	0	<input checked="" type="checkbox"/>
Recently added	Audience				
	UK office	Complete within 1 year(s) of first login <input checked="" type="checkbox"/>	View dates	3	<input checked="" type="checkbox"/>
	Audience				
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.



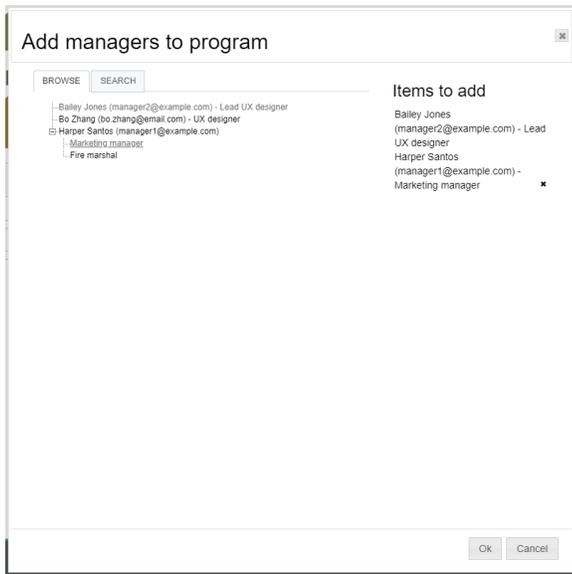
Audience membership as well as audience-based enrolled learning will occur before new users first log into the platform.

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

Assigning by management hierarchy

1. While editing the program, 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.

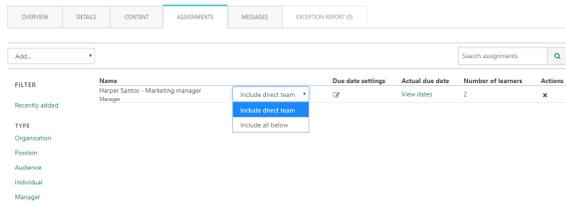
A delete icon to remove a manager from the selection will appear on hover over.



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.



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

Assigning individual users

1. While editing the program, 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.

Add individuals to program

BROWSE SEARCH

- Micah Norton (manager3@example.com)
- Lee Singh (learner.one@example.com)
- Kylie Harden (learner.two@example.com)
- Charlie Jensen (alastair-test1@ct.net.nz)
- Ariel Molton (alastair-test5@ct.net.nz)
- Ellis Novak (alastair-test1@ct.net.nz)
- Elliot Murphy (alastair-test2@ct.net.nz)
- Sasha Gruber (learner.four@example.com)
- Alexis Rodriguez (learner.three@example.com)
- Admin User (admin@example.com)
- Harper Santos (manager1@example.com)
- Bo Zhang (bo.zhang@gmail.com)
- Bailey Jones (manager2@example.com)

Items to add

- Lee Singh (learner.one@example.com)
- Alexis Rodriguez (learner.three@example.com)
- Elliot Murphy (alastair-test2@ct.net.nz) ✖
- Sasha Gruber (learner.four@example.com)

Additionally you can enter an **due date** as described below.

ASSIGNMENT	DETAILS	CONTENT	ASSIGNMENTS	MESSAGES	EXCEPTION REPORT (0)
ASS...	Search assignments				
FILTER	Name	Due date settings	Actual due date	Number of learners	Actions
Recently added	Lee Singh Individual	☑ No due date	No due date	1	✖
	Alexis Rodriguez Individual	☑	04 Jan 2020 at 13:53	1	✖
TYPE	Elliot Murphy Individual	☑ No due date	No due date	1	✖
Organisation	Sasha Gruber Individual	☑	29 May 2020 at 00:00	1	✖
Position					
Audience					
Individual					
Manager					

Assignment due date

The due date for users enrolled in the program 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.
- **Program completion:** Relative to the time another specified program 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.
- **Program enrolment date:** Relative to the time a user was enrolled in this program.

Completion criteria

Complete by at :

or

Complete within of

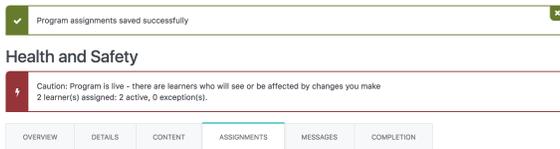
An assignment due date will be assigned to other users as they join the group. The actual due date cannot be changed if the user has already completed the program.

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

Once saved, a confirmation message appears at the top of the screen.



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 program using the corresponding assignment type. It is important to note:

- Due dates for assigned users can only be extended
- If a fixed due date is set, the date change will be applied immediately
- If a relative due date is set, the due date will be applied to the users as soon as it can be successfully determined
- For assigned users that have been given a time exception, the program due date is not updated

FILTER	Name	Due date settings	Actual due date	Number of learners	Actions
Recently added	Alexis Rodriguez Instructor	<input checked="" type="checkbox"/>	04 Jan 2020 at 13:53	1	
TYPE	Block-Murphy Individual	<input checked="" type="checkbox"/>	No due date	1	
	Financial Organisation	<input checked="" type="checkbox"/> Include all below	Complete by 24 Jun 2020 at 00:00	1	
Position	CEO Position	<input checked="" type="checkbox"/> Include all below	Complete within 18 Day(s) of Program enrollment date	4	
	Audience Harper Santos - Marketing manager	<input checked="" type="checkbox"/>	View dates	1	
Individual	Manager	<input checked="" type="checkbox"/> Include direct team	Complete by 25 Aug 2021 at 00:00	1	
	Manager		View dates	1	

Searching and filtering

If you would like to find a particular program 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.

Advanced features

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

1. Go to **Advanced features** from the **Site administration menu**.
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.