Managing Programs

Totara program management supports the creation of adaptive learning paths, where completion dependencies can be defined and the order and flow of the competencies and courses learners complete can be controlled.

A program includes completion dates and time frames for enrolled learners to complete each stage of the program. Personalised and customised messages and reminders can also be configured to be automatically sent to enrolled learners and their managers.

Learners can be enrolled in a programs based on their organisation, position, management hierarchy, individually or via an audience, with different completion criteria set for each group if required.

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.

Creating a program

1. Select **Programs** from the **Site administration menu**.
2. Select **Add a new program**.
3. Complete the **Details** section.
4. Add program **Content**.
5. Add program **Assignments**.
6. Create program **Messages** as required.
7. Select **Save changes.**

Alternatively, site administrators, site managers and course creators can create programs via the Course Catalogue:

1. Go to the Course Catalogue via *Find Learning* within the top navigation
2. Select **Create** and choose **Program** from the dropdown list.
3. Complete the **Details**, **Content**, **Assignments** and **Messages** sections as required.
4. Click **Save Changes.**

Adding program details

The details section includes basic information about the program and core settings for display and availability.

Setting	Description	Notes
Category	Select which course category the program should sit under.	The category selected has no impact on which courses can be selected within the program and is for site organisation and navigation purposes only.
Full name	The name or title of the program.	This will be displayed in the program overview area and within the Course Catalogue.
Short name	The short or abbreviated name of the program. The display of a program short name is limited across the site.	The short name must be unique.
ID	An optional field to provide a program ID number.	A program ID can be used to match external systems for data exchange purposes.

Available From	Set a date from which the program is available to learners.	If **Available from** and **Available until** dates are set, learners will be able to find and enter the program during the period specified by the dates but will be prevented from accessing the program outside of those dates.
Available Until	Set a date until which the program is available to learners. After the date specified, the program will not appear on any program listings or be accessible, except to administrators.	Messages and notifications regarding the program may still be sent after this date if, for example, you have a **Due date** set after the **Available until** date.
Summary	The summary or program description text is displayed in the search program page and when a learner is viewing the details of the program.	This text can also be used within the Course Catalogue.
Summary files	The summary file is displayed in the list of programs.	Summary files might include program descriptors or relevant images files relating to the program.
Endnote	The program endnote displays when the learner has completed the program.	-
Visibility	Select which group of users can see the program in the Course Catalogue and within any list of program. Choose from: • All users • No users • Enrolled users only, or • Enrolled users and members of the selected audience(s).	Please see Audiences for more information on creating audiences. Audience-based visibility must be enabled via Advanced features for this option to to display.
Current icon	Choose a program icon from the available list. Icons can be displayed within program lists and within the Course Catalogue.	Add new icons via *Courses > Custom icons* under the **Site administration menu**. Graphic files will be resized to 35 x 35 pixels automatically.
Image	Choose an image to associate with the program.	This image will become the background image if this program is added as a program tile in a Featured Link Block and within the Course Catalogue.
Tags	Associate tags to the program.	Tags can be added as filters or search terms within the Course Catalogue.
Allow extension requests	When enabled users can submit extension requests for this program, which can then be approved or denied by their manager.	Program extension requests need to be enabled on the Advanced features page to be able to allow or disallow program extension requests for a program.
Custom fields	Any custom fields that have been added to the site for programs will be displayed here.	Program custom fields can be added via *Programs > Custom fields* from the **Site administration menu**.

Editing a program

Once a program has been created it is still possible to make changes by editing the program, although be aware that if a program is live, any changes made will impact on the assigned learners.

1. Go to **Programs** within the **Site administration menu**.
2. Select the name of the category (or sub category) in which the program sits
3. Select the corresponding **Settings** icon ( ) for the required program, or select the program name to open it, then select **Edit program details**.
4. Edit the program **Details, Content, Assignments** and **Messages** as required, as described below.
5. Select **Save changes** on each page to save any edits or **Cancel** to disregard.

A program can also be deleted, moved up or down the program listing page, hidden, or moved to another category within the category program listing using the corresponding **Edit** icons.

Program overview report

Within the report builder it is possible to use the **Program overview** report source to create reports combining the status of individual completions in programs as well as the courses within those programs. This allows a report manager to configure reports of based on the user, program and course information in the report source.

To find out more about how to set up and edit a report using the program overview report source see the **Managing user reports** section of the Managing reports help documentation.

Tracking and editing program completion

The **Program completion editor** must be enabled via Advanced features via the **Site administration** menu for the **Completion** tab to appear.

Please see the dedicated Program completion editor help documentation page for more information.

Setting a default image for all programs

Each program within Totara Learn can be represented within the Course catalogue by a custom image as set within the program **Details**. A default image, for those programs without a custom image, can be set at the site level by following the below steps:

1. Select **Programs** from the **Site administration menu**.
2. Click on the **Set default image for all programs** link.
3. Drag and drop or upload an image in the **Default image** field.
4. Select **Save changes**.

Program editing capabilities

It is possible to assign a variety of editing permissions within the program functionality. Any user with one or more of the following capabilities will see an **Edit program details** button whenever they view a program.

By clicking on this they will then see the **Overview** tab, followed by additional tabs based on the capabilities they have assigned to them as follows:

- *totara/program:configuredetails:* For the **Details**
- *totara/program:configurecontent:* For the **Content** tab.
- *totara/program:configuremessages:* For the **Messages** tab.
- *totara/program:configureassignments:* For the **Assignments** tab.
- *totara/program:handleexceptions:* For the **Exceptions** tab (this applies even if there are no exceptions currently).
- *totara/program:editcompletion:* For the **Completion** tab

▾ Collapse all

▾ Program details

Category	Compliance Training
Full name	Health and Safety
Short name	HandS
ID	
Available From	4 April 2019 ⬚ Enable
Available Until	4 April 2019 ⬚ Enable

▾ Audience-based visibility

Audience-based visibility	Enrolled users and members of the selected audiences

▾ Appearance

Scheduled tasks

There are a number of scheduled tasks that take place as part of program management.

Scheduled task	Purpose
Deferred program assignments changes	Processes any program assignments that have been deferred.
Program availability checks	Checks availability according to available from and to settings and marks the program as available or not available.
Clean enrolment plugins in programs	Removes instances of *totara_program enrolment* plugins in courses that are not in course sets.
Program completions	This task checks every completion record to ensure that course completions that are processed outside of normal completions processes (such as using the course completion editor) are included in the program completion.
Copy recurring courses in programs	Makes a backup of any courses that are part of recurring course programs.
First login program assignments	Makes program assignments for any assignment type that requires a date that cannot be obtained when program is setup (e.g. completion 6 months from first login).
Program recurrence history	Fixes up completion history for courses that are recurring and have been completed (see comment in *totara/program/classes/task/recurrence_history_task.php*)
Program recurrence	Removes assignments to programs so they can be reassigned for recurring programs.
Send messages related to programs	Sends messages setup in the messages tab of programs.
Switch recurring courses in programs	Switches out recurring courses that were backed up by *Copy recurring courses in programs* task.
Program user assignments	Checks that program user assignments are correct (and assigns or unassigns as necessary or raises exceptions if issues are found).