

Competency items

Competency items are the individual competencies that sit within a [competency framework](#).

Adding a competency item

You can add competency items to a competency framework individually, via [bulk actions](#) or via [HR import](#).

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Example Competency Framework 2

No competencies defined

To add competency items individually:

1. Go to *Quick-access menu > Competencies*.
2. Click on the **Name** of the competency framework in which you would like to add a competency item.
3. Click the **Add new competency** button.
4. Configure the competency item **settings** as required.
5. Click **Save changes**.

Your new competency item now appears in the selected competency framework.

Editing a competency item

1. Go to *Quick-access menu > Competencies*.
2. Click the name of the competency framework you wish to update.
3. Click the edit icon () in the **Actions** column for the corresponding competency item.
4. Make the required changes to the **settings**.
5. Click **Save changes**.

Competency item settings

When creating or editing a competency item you will notice that the settings are broken into three tabs:

- **General:** The general settings for the competency
- **Linked courses:** Where you can link courses to your competency
- **Achievement paths:** You can set the path to achieving a particular rating for the competency

General settings

The general settings allow you to configure each competency item, including who can assign it.

Setting	Description	Notes
Framework	This field cannot be edited and simply shows the selected competency framework.	This field cannot be edited and simply displays information.
Parent	The parent competency allows you to build parent/child relationships between the individual competency items in your hierarchy framework. You must have at least one competency item set up in your framework for this option to be available. The default value is Top .	This option will not appear on the first competency item you create within a framework, however it will be available for all subsequent ones or when editing the initial one (after creating subsequent items).
Full name	Enter the name of competency item.	-
ID number	The ID number is a unique number used to represent the competency.	If you try to use an ID that already exists you will get the following validation error: Record with this ID number already exists.
Description	Presents a free-text field for providing more details about this competency. This data is displayed when viewing the hierarchy listing, and the individual competency page.	-

Type	Choose whether you want to set a competency type . Types are containers for custom fields. When you assign a competency to a type, the competency inherits the custom fields associated with it. This is an optional field which can be left blank or set later.	If a competency is assigned a type it inherits any custom fields that have been assigned to that type. This allows you to organise metadata relating to your competencies and only show the fields that each type of competency needs.
Scale	This is the competency scale that is used in the competency framework. The competency scale is set in the competency framework. Only one competency scale can be used in each framework.	This field cannot be edited and simply displays information.
Non-admin assignment availability	You can choose who can assign this particular competency by ticking one or more of the following: <ul style="list-style-type: none"> • Users who may self-assign • Users who may assign to others 	-

Linked courses

You may wish to assign courses as a mandatory part of achieving the competency.



From Totara 13 the indication of mandatory against a course is only relevant in learning plans. When linked courses are used in competency criteria the indication that a course is mandatory has no impact on any Totara Perform functionality.

When editing a competency item you can click on the **Linked courses** tab and then follow these steps:

1. Click the **Add linked courses** button.
2. Browse or search for courses and then tick the box alongside one or more courses to add them.
3. Once you've selected the desired course click **Save changes**.

You will see a **Mandatory** box alongside each linked course. Ticking this box will make the course a mandatory requirement of achieving this competency item. There is also a delete icon () to remove the linked course from the competency item.

Remember to click **Save changes** before navigating away from the tab.

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Edit competency: Example competency

GENERAL
LINKED COURSES
ACHIEVEMENT PATHS

Add linked courses

Courses

Mandatory

Front-line solution-oriented extranet	<input checked="" type="checkbox"/>	
Cross-platform foreground firmware	<input checked="" type="checkbox"/>	
Front-line user-facing knowledgebase	<input checked="" type="checkbox"/>	

Save changes
Cancel

Achievement paths

When using Totara Perform you can set achievement paths for each of your competency items. You can see more on the [Achievement paths](#) page.

Aggregation

If the aggregation method of a parent competency is set as **All** then it will be automatically marked as complete on the next cron run after all of the child competencies have been marked as competent. Likewise, if the user is only required to complete one of the child competencies, the parent competency will be marked as complete when the cron runs after one child competency is marked as complete.

The scheduled task responsible for updating competency status is `totara_hierarchy/task/update_competencies_task`. By default this is set to run every hour.

If the parent competency requires all child competencies to be complete but only a subset of the child competencies are assigned to the given user, the parent competency will not be marked as complete.

Deleting a competency item

1. Go to *Quick-access menu > Competencies*.
2. Click the name of the competency framework you wish to update.
3. You can use the delete icon () in the **Actions** column for the corresponding competency item.
4. A warning message will be displayed. Carefully read the confirmation message, and once you understand the implications of deleting the competency item, click **Continue**. If you do not wish to continue click **Cancel**.

Bulk actions

Bulk actions allow you to **Add**, **Delete**, or **Move** multiple competency items in one action.

Add competency items

In the **Bulk actions** dropdown list select **Add** to create multiple competency items with the same **Parent** and **Type**.

1. Go to *Quick-access menu > Competencies*.
2. Click the name of the competency framework you wish to update.
3. Select **Add** from the **Bulk actions** dropdown menu.
4. Select the **Parent** competency.
5. Enter each competency item you wish to add on a new line (i.e. one per line).
6. Choose the **Non-admin assignment availability** (to allow either self-assignment or assignment to others by those with the correct permissions).
7. Click **Save changes**.

Your new competency items now appear in the competency framework.

Add multiple competencies

There are required fields in this form marked *.

Competency framework

New competency framework

Parent* 

Enter Competency names (one per line)*



Scale 

Competency scale

Non-admin assignment availability 

- Users who may self-assign
- Users who may assign to others

Save changes

Cancel

Delete competency items

In the **Bulk actions** dropdown list select **Delete** to remove multiple competency items with the same **Parent** and **Type**.

1. Go to *Quick-access menu > Competencies*.
2. Click the name of the competency framework you wish to update.
3. Select **Delete** from the **Bulk actions** dropdown menu.
4. Select the **Available competencies** you wish to delete and click **Add >** to transfer them to the **Selected competencies** area (hold Ctrl on the keyboard to select multiple items).
5. Click **Delete selected competencies**.
6. A warning message is displayed, click **Yes** to confirm.

The selected competency items will be deleted.

Bulk delete competencies

Available Competencies

Search available items Search

People Management
 Training and Development
 Managing Performance
 Coaching and Mentoring
 Team Building
Personal Development
 Career Progression
 Professional Development
 Commitment to Excellence
 Structured Thinking
Test competencies

Add >

< Remove

Selected Competencies

Clear selection

Test competencies

Delete selected competencies

Bulk move competency items

In the **Bulk actions** dropdown list select **Move** to transfer multiple competency items with the same **Parent**.

1. Go to *Quick-access menu > Competencies*.
2. Click the name of the competency framework you wish to update.
3. Select **Move** from the **Bulk actions** dropdown menu.
4. Select the **Available Competencies** you wish to move and click **Add >** to transfer them to the **Selected Competencies** area (hold Ctrl on the keyboard to select multiple items).
5. From the **Move selected Competencies to:** dropdown menu, select the **Parent** competency where you wish to move the selected competency items.
6. Click the **Move** button.
7. A warning message is displayed, click **Continue** to confirm. Alternatively you can click **Cancel** if you do not wish to continue.

The selected competency items are now moved.

Bulk move competencies

Available Competencies

People Management
Training and Development
Managing Performance
Coaching and Mentoring
Team Building
Personal Development
Professional Development
Commitment to Excellence
Structured Thinking
Career Progression

Selected Competencies

Professional Development
Commitment to Excellence
Structured Thinking
Career Progression

Move selected competencies to:

- ✓ Top
- People Management
- Training and Development
- Managing Performance
- Coaching and Mentoring
- Team Building
- Personal Development

Top

Bulk reclassify items

Once you have created a [competency type](#) you will be able to bulk reclassify competency items on your site.

Bulk re-classification allows you to re-classify all competency items assigned to a particular competency type (including no type or **Unclassified**) to another competency type.

1. Go to *Quick-access menu > Competencies*.
2. Click the name of the competency framework you want to work within.
3. Select **Re-classify items** from the **Bulk actions** dropdown list.
4. Scroll to the bottom of the **Manage types** page to find the **Bulk re-classification** section.
5. Select the type you wish to re-classify from the **Reclassify all items from this type** dropdown menu.
6. Click **Choose** next to the type you wish to re-classify the items to.
7. Click **Re-classify items** to complete.

Alternatively:

1. Go to *Quick-access menu > Competencies > Manage types*.
2. Scroll to the bottom of the page to the **Bulk re-classification** section.
3. Select the type you wish to re-classify from the **Reclassify all items from this type** dropdown menu.
4. Click **Choose** next to the type you wish to re-classify the items to.
5. Click **Re-classify items** to complete.

Cancel

Reclassifying "Structured Thinking" - step 1 of 2

Select the new type.

Current type

Name Unclassified

Custom fields No custom fields

New type

<input type="button" value="Choose"/>	Analytical	Example checkbox (Checkbox) Example date time (Date/time) Example file (File) Example location (Location) Example multi-select (Multi-select) Example text area (Text area) Example text input (Text input) Example URL (URL) Example menu of choices (Menu of choices)
<input type="button" value="Choose"/>	Creative	Manager approval (Checkbox)
<input type="button" value="Choose"/>	Strategic	Link to resources (URL)

Assigning related competencies

It is possible to assign one or more competencies to another competency to show that they are related. Related competencies are for informational purposes only and they do not have any actions associated with them.

1. Select *Quick-access menu > Competencies*.
2. Choose a competency framework.
3. Choose the competency name from the list that you want to assign related competencies to.
4. Select **Assign related competencies**.
5. Choose one or more competencies and select **Save**.

To remove a related competency, select the delete icon next to it.

Assigning competencies to positions and organisations

You can also link competencies with organisations and/or a positions within the corresponding position and/or organisation items. For instructions on this process please refer to [Organisations](#) and [Positions](#).

Exporting competency items

Site Administrators can export all competency items within the selected competency framework in either Excel, .csv or .ods format.

To export competency items:

1. Go to *Quick-access menu > Competencies*.
2. Select the name of the competency framework you wish to export from.
3. Select the required format under **Export all items from framework**.
4. Click **Export all items**.

Totara Academy



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