Competency assignment

Competency assignments allow you to assign competencies (from your existing competency frameworks) to users or groups of users (e.g. audiences, organisations etc.) and manage those assignments.

Creating competency assignments

Before you create any competency assignments you will first need to ensure you have created some competencies on your site.

1. Go to *Site administration > Competency assignments.*
2. Select the **Create assignments** button.
3. Choose one or more competency to assign and then select the **Assign** button.
4. From the **Users to assign** dropdown menu select which types of users to add, then select the group or individual users.
5. Select **Save changes** then click the **Create assignments** button.
6. You will be presented with a confirmation message, where you can decide whether to activate the new assignments or not.
7. Finally, select **Yes**.

> ⚠ Users must have the **totara/competency:manage_assignments** and **moodle/user:viewdetails** capabilities to view the **Competency assignments** page.
>
> When assigning competencies by position or organisation users require the **totara/hierarchy:viewposition** or **totara/hierarchy:vieworganisation** respectively.
>
> To assign competencies to audiences users will need either the **moodle/cohort:view** or **moodle/cohort:manage** capability. Only system-level audiences can be assigned competencies (not audiences within categories).

Assignment types

Depending on how a competency is assigned it will have a different assignment type. The three assignment types are:

- **Individual (Admin):** The competency is assigned to individual users via the admin interface.
- **Individual (System):** If an assignment has been archived there is an option to **Enable continuous achievement tracking** for all users involved. This allows continuous tracking even though the original assignment does not exist any more. All the users previously assigned will get a system assignment in this case. You can also enable the **Continuous achievement tracking** setting (*Quick-access menu > Competencies > Competency settings*) for all users who fall out of an assignment (e.g. due to a changing position).
- **Directly assigned:** The competency was assigned by a user to themselves via the competency profile, or assigned by a manager to one of their staff members for example.

Currently assigned user report

The **Currently assigned user report** utilises the report builder tool in Totara, allowing you to customise the report to best suit your needs. It shows you each competency assignment in the system, allowing you to look at competency assignments in detail. For each competency assignment you can see:

- Who the competency was assigned to (user's full name)
- Which competency was assigned (competency name)
- How it was assigned (assignment type e.g. via individual assignment, via group assignment such as by membership to a particular audience or organisation)
- Who assigned it and when

This report details every single assignment to a competency, whereas the mini-report you see on the **Competency assignment** page only shows the Competency assignment groups, rather than showing the impact on each user (unless the assignment type was to an individual). This also means that you can see duplicate assignments, if someone has been assigned to the same competency multiple times through different methods (for example once via their position and then again via their membership of a particular audience).

> ⚠ To view the **Currently assigned users** embedded report users need to have the **totara/competency:manage_assignments** (or **totara/competency:view_assignments**) and **moodle/user:viewdetails** capabilities.

Currently assigned users

▾ Search by

User's Fullname ⓘ	contains ▾	

Competency Name ⓘ	contains ▾	

Assignment type ⓘ	is any value ▾	Position ▾

Search   Clear

Show more...

User's Fullname	Competency Name	Assignment type	User Group	Who assigned	When assigned
Christopher Isa	Ask open questions to appreciate others' point of view	Individual (Admin)	Christopher Isa (295eb1ca-6f14-3349-bbe1-1ab09bdefd18)	Admin User	20 Nov 2019 at 14:42
Avram Constantin	Ask open questions to appreciate others' point of view	Individual (Admin)	Avram Constantin (af529056-e171-3d30-b08c-a85bef8896dc)	Admin User	20 Nov 2019 at 14:42
Avram Constantin	Act in a fair and respectful way in dealing with others	Individual (Admin)	Avram Constantin (af529056-e171-3d30-b08c-a85bef8896dc)	Admin User	20 Nov 2019 at 14:42
Christopher Isa	Role model continuous learning and self development	Individual (Admin)	Christopher Isa (295eb1ca-6f14-3349-bbe1-1ab09bdefd18)	Admin User	20 Nov 2019 at 14:42
Avram Constantin	Role model continuous learning and self development	Individual (Admin)	Avram Constantin (af529056-e171-3d30-b08c-a85bef8896dc)	Admin User	20 Nov 2019 at 14:42
Aminu Elizabeth	Fully meet commercial confidentiality and data security requirements in contracts	Audience	New users (AUD0001)	Admin User	9 Dec 2019 at 14:12
Cornelia Saarenheimo	Fully meet commercial confidentiality and data security requirements in contracts	Audience	New users (AUD0001)	Admin User	9 Dec 2019 at 14:12

Export as   CSV ▾   Export

Managing competency assignments

When viewing the list of competency assignments you will see icons alongside each assignment. These allow you to activate (➡), archive (🗄) and delete (🗑) assignments, depending on their current status. You can also perform these actions on multiple competency assignments using the bulk action dropdown menu.

⚠ Users managing competency assignments need to have the **totara/competency:manage_assignments** and **moodle/user:viewdetails** capabilities.

Filtering

You can filter competency assignments to drill-down and display only the assignments you are currently interested in seeing.

There are a number of ways you can filter competency assignments:

- By status (e.g. draft, active, or archived)
- By assignment type
- By competency framework
- By searching (using the search box)

Bulk actions

You can perform the same action on multiple competency assignments using the **Bulk action** dropdown menu.

1. Select the competency assignments you wish to perform the action on.
2. From the bulk action dropdown menu select the action you wish to perform:
   - Activate
   - Archive
   - Delete (items must be archived before they can be deleted)
3. You will see a confirmation box, read this and then select **Yes** if you are happy to proceed.

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.