

Position types

Managing position types

Types allow you to set up custom fields and apply those fields to position items set up within your framework. They allow you to apply different custom fields to different items within your position framework, or the same custom fields to all position items.

Types are optional and can be applied in two different ways:

- When the hierarchy item is set up
- By editing a hierarchy item

The Type names and custom fields can be displayed in user reports built through [Reports](#).

Creating position types

To create a position type:

1. Navigate to *Quick-access menu > Positions*.
2. Click **Manage Types**.
3. Click **Add a new type**.
4. Complete the required fields and click **Save changes**.

Your type is now set up and can be used to classify position items in your framework(s).

Editing a position type

1. Navigate to *Quick-access menu > Positions*.
2. Click **Manage Types**.
3. Click **Edit** in the Actions column for the position type you wish to edit.
4. Make the required changes.
5. Click **Save changes** to save your changes.

Delete a position type

1. Navigate to *Quick-access menu > Positions*.
2. Click **Manage Types**.
3. Click **Delete** in the Actions column for the position type you wish to edit.
4. A warning message is displayed, click **Yes** to confirm.

Custom fields

Custom fields are specific to the type they are set up under. When you assign a type to a position item, the position item inherits the custom fields associated with the type.

1. Navigate to *Quick-access menu > Positions*.
2. Click **Manage Types**.
3. Click the Type name you wish to add a custom field to. Any custom fields already set up display here.
4. Click the **Create a new custom field** dropdown box and select the style of custom field you wish to set up:
 - Checkbox
 - Date/time
 - File: Creates a file upload field
 - Location
 - Menu of choices
 - Multi-select
 - Text input
 - Text area
 - URL
5. Give the custom field a full name and a short name. The short name is used for display purposes.
6. Set the other common settings:
 - a. **Is this field required?** When set to **Yes** the field is compulsory.
 - b. **Is this field locked?** When set to **Yes** the field only displays the information set when the field was set up.
 - c. **Should the data be unique?** When set to **Yes** the field only accepts a unique values.
 - d. **Hidden on the settings page?** When set to Yes the field is not displayed on the competency framework overview page.
7. Complete the specific settings required for the custom field you have selected.
8. Click **Save changes**.

Your custom field is now set up, you can set up as many custom fields under each type as required to hold the specific information for your position items.

Assigning types to position items

Once you have set your position Types up, you can assign position items to them. When you create a position item you can set the type field, or you can set the field later.

1. Navigate to *Quick-access menu > Positions*.
2. Click **Manage Positions**.
3. Click the name of the position framework you want to work in.
4. Click **Edit** in the Actions column for the position Item.
5. Select the Type from the drop down box if no Type is assigned. Click **Change Type** if a Type is already assigned to the position Item.
6. Click **Save changes**.

Bulk re-classification

Bulk re-classification allows you to re-classify all position items assigned to a particular position type to another position type.

Re-classifying positions

1. Navigate to *Quick-access menu > Positions*.
2. Click **Manage Positions**.
3. Click the name of the position framework you want to work within.
4. Select **Re-classify items** from the **Bulk Actions** dropdown list.
5. This opens the **Manage Position Types** page.
6. Scroll to the bottom of the page to the **Bulk re-classification** section.
7. Select the Type you wish to re-classify from the dropdown box (this action reclassifies all position items that currently have this Type assigned to them).
8. The **Re-classifying** page appears and the number of position items you are re-classifying appears in the title.
9. Click **Choose** next to the Type that you wish to re-classify.
10. A warning message appears detailing the change. Click **Re-classify items** to complete the process.

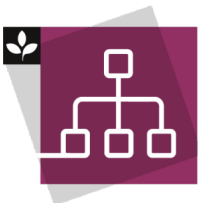
The items have now been re-classified.

Re-classifying types

1. Navigate to *Quick-access menu > Positions*.
2. Click **Manage Types**.
3. Go to the **Bulk re-classification** section at the bottom of the **Manage Types** page.
4. Select the Type you wish to re-classify from the dropdown box (this action reclassifies all position items that currently have this Type assigned to them).
5. The Re-classifying page appears and the number of position items you are re-classifying appears in the title.
6. Click **Choose** next to the Type you wish to have re-classified.
7. A warning message appears detailing the change, click **Re-classify items** to complete the process.

The items have now been re-classified.

Totara Academy



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

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