

Competency types

Competency types allow you to create custom fields and apply those fields to competency items set up within your framework.

Types are optional and can be associated to a competency item when it is being added or edited.

The type names and their custom fields can also be displayed in user reports built through the [report builder](#).

Add a new type

Types ⁱ

Name	Competency type ID number	Competencies	Custom fields	Actions
Analytical	001	2	9	
Creative	002	10	1	
Strategic	003	0	1	
Unclassified		19		

Creating a competency type

1. Go to *Quick-access menu > Competencies > Manage types*.
2. Click the **Add a new type** button.
3. Enter a name in the **Type full name** field.
4. Optionally enter a **Competency type ID number**.
5. Optionally add a **Competency Type Description**.
6. Click **Save changes**.

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

Editing a competency type

1. Go to *Quick-access menu > Competencies > Manage types*.
2. Click **Edit** () in the **Actions** column for the competency type you wish to edit.
3. Make the required changes.
4. Click **Save changes**.

Deleting a competency type

1. Go to *Quick-access menu > Competencies > Manage types*.
2. Click **Delete** () in the **Actions** column for the competency type you wish to edit.
3. A warning message is displayed. Click **Yes** to confirm or **Cancel** to exit.

Custom fields

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

To create a custom field:

1. Go to *Quick-access menu > Competencies > Manage types*.
2. Click the name of the type in which you want to add a custom field.
3. Select the **Create a new custom field** dropdown box and choose which [Custom field type](#) you wish to set up.
4. Configure the [general settings](#).
5. Complete the [specific settings](#) required for the custom field you have selected.
6. 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 competencies.

General custom field settings

Setting	Description	Notes
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Full name	The name of the custom field - this should be descriptive.	-
Short name	This is the unique short name.	-
Is this field required?	When set to Yes the field is compulsory.	-
Is this field locked?	When set to Yes the field only displays the information set when the field was set up.	-
Should the data be unique?	When set to Yes the field only accepts unique values.	-
Hidden on the settings page?	When set to Yes the field is not displayed on the competency framework overview page.	-

Custom field types and settings

Custom Field Type	Description	Specific settings	Notes
Checkbox	A check or tick box field	Select whether the checkbox should be checked /selected by default.	-
Date and Time	A day, month, year, hour and minute selector	Enter the Start year and End year to set the range of dates available. Check the Include time? box to include the hour and minute selector.	Users must Enable the field to use.
File	Adds a standard file upload field	-	Any number of files can be added to this area.
Location	Provides an address field and an optional Google Maps location	Optionally default values for: <ul style="list-style-type: none"> • Address • Map size • Map view • Display • Map location 	You can set the map location using an address entered above or search for an address, town or city. If you want to refine the location of the Google Maps pin, you can do so by clicking on it while holding the mouse button, moving the pin and then releasing the mouse button.
Menu of choices	A drop down field with single option selection	Enter one or more Menu options in the box provided with one item per line. Optionally set a Default value in the box under the list of Menu options .	Menu options (one per line) ⓘ <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> first second third fourth fifth </div>

<p>Multi-select</p>	<p>A tick box to select one or many options. A custom image may be added for each option.</p>	<p>Enter one or more Menu options in the fields provided.</p> <p>Add more menu options using the Add another option link.</p> <p>Optionally add icons for each option via the Choose icon link and/or make one option Selected by default.</p>	<p>Deleting menu options from custom field settings will not remove it from the records where it is currently selected.</p> <p>Custom icons can be loaded via the quick-access menu through <i>Courses and categories > Courses > Custom icons</i>.</p> <div data-bbox="537 241 1446 472"> <p>Menu options (and icons) ⓘ</p> <table border="0"> <tr> <td><input type="text" value="a"/></td> <td>Icon 🏆</td> <td>Choose icon</td> <td>Make selected by default</td> <td>Delete</td> </tr> <tr> <td><input type="text" value="b"/></td> <td>Icon 🎨</td> <td>Choose icon</td> <td>Make selected by default</td> <td>Delete</td> </tr> <tr> <td><input type="text" value="c"/></td> <td>Icon 🍷</td> <td>Choose icon</td> <td>Make selected by default</td> <td>Delete</td> </tr> <tr> <td><input type="text" value="d"/></td> <td>Icon ⭐</td> <td>Choose icon</td> <td>Make selected by default</td> <td>Delete</td> </tr> <tr> <td><input type="text" value="e"/></td> <td>Icon 📦</td> <td>Choose icon</td> <td>Selected by default</td> <td>Delete</td> </tr> </table> <p>Add another option</p> </div>	<input type="text" value="a"/>	Icon 🏆	Choose icon	Make selected by default	Delete	<input type="text" value="b"/>	Icon 🎨	Choose icon	Make selected by default	Delete	<input type="text" value="c"/>	Icon 🍷	Choose icon	Make selected by default	Delete	<input type="text" value="d"/>	Icon ⭐	Choose icon	Make selected by default	Delete	<input type="text" value="e"/>	Icon 📦	Choose icon	Selected by default	Delete
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<p>Text area</p>	<p>A free text area with the default HTML editor.</p>	<p>Optionally set a Default value for the contents of the text box.</p> <p>Specify the width of the text area via the Columns area and the height via Rows.</p>	<p>If a text editor plugin is applied to the text area the width will be determined by the plugin, and changing this value may have no effect.</p>																									
<p>Text input</p>	<p>A single line of text for short lines of text</p>	<p>Optionally set a Default value for the contents of the text field.</p> <p>Optionally set the Display size by entering the maximum number of characters this field will display.</p> <p>Optionally set the Maximum length by entering the number of characters this field will accept.</p> <p>Optionally enter a Regular expression validation and the Description of the regular expression validation format.</p>	<p>A regular expression that will be used to ensure entered text is in the expected format. For example <code> /^[0-9]{3}\$/ </code> will ensure the text consists of exactly three numbers.</p> <p>This validation is performed only when submitting forms with custom fields, current data is not affected after validation is changed.</p>																									
<p>URL</p>	<p>A weblink</p>	<p>Enter the URL and optionally some Default text.</p> <p>Check the box for the link to Open in a new window.</p>	<div data-bbox="537 1680 1463 1711"> <p>Example URL ⓘ</p> <p>URL <input type="text" value="http://totara.community"/> Text <input type="text" value="Totara Academy"/> <input checked="" type="checkbox"/> Open in new window</p> </div>																									

« All types

Custom field	Type	Edit
Example checkbox	Checkbox	
Example date time	Date/time	
Example file	File	
Example location	Location	
Example menu of choices	Menu of choices	
Example multi-select	Multi-select	
Example text area	Text area	
Example text input	Text input	
Example URL	URL	

Create a new custom field

Assigning types to competency items

Once you have set up your competency types, you can associate competency items with them.

1. Go to *Quick-access menu > Competencies*.
2. Click the name of the competency framework you want to work in.
3. In the **Actions** column for the competency item click the edit icon ().
4. Alongside the **Type** setting click **Change type**.
5. Next to the type you wish to re-classify the item to click **Choose**.
6. Click **Re-classify items** to confirm your selection.
7. Finally, click **Save changes** back in the competency items setting.

« Back to all competency frameworks

New competency framework

Name	Linked courses	Actions
■ Example competency	0	
■ Understanding of agile working practices	0	<input type="button" value="Edit"/>

Export all items from framework [?]

Format

You can also bulk reclassify items within a framework. You can read more about how to do this on the [Competency items](#) page of this Help documentation.

Totara Academy



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

