

Competency Items

Adding a competency item

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



To add competency items individually:

1. In the **Administration menu**, go to *Hierarchies > Competencies*.
2. Select **Manage Competencies**.
3. Click on the **Name** of the competency framework in which you would like to add a competency item.
4. Click **Add new Competency**.
5. Configure the competency item [Settings](#) as required.
6. Click **Save changes**.

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

Settings

Setting	Description	Notes
Competency 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).
Name	Enter the name of competency item.	-
Competency ID number	Competency 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, see Competency Types to learn more.	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 sort of competency needs.
HR Import?	Checking this field will enable HR Import and will allow the competency element to be updated/deleted from an external source (if configured).	The idnumber field MUST have a value to enable this field as per the HR Import settings .

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

Aggregation method	<p>The aggregation method sets how the system will calculate the competency achievement. The options are:</p> <ul style="list-style-type: none"> ▪ All: This means that all the child competencies will have to be achieved for the parent competency to be declared achieved. ▪ Any: This means that only one of the child competencies needs to be met to successfully achieve the parent competency. ▪ Off: Automatic achievement will be deactivated for this competency. (It may still be marked achieved manually.) 	
Scale	<p>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.</p>	<p>This field cannot be edited and simply displays information.</p>

Example Competency Framework 2 - People Management

Full name People Management
 Type Unclassified
 Competency aggregation method All

Related Competencies

Competency framework	Name	Options
No related competencies		

[Assign related competencies](#)

Linked courses

Name	Link type	Options
No linked courses set up for this competency		

[Assign course completions](#)
[Return to competency framework](#)


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, for the **Any** option, 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.

Editing a competency item

1. In the **Administration menu**, go to *Hierarchies > Competencies*.
2. Click **Manage Competencies**.
3. Click the name of the competency framework you wish to update.
4. Click the **Edit** icon () in the **Actions** column for the corresponding competency item.
5. Make the required changes.
6. Click **Save changes**.

Deleting a competency item

1. In the **Administration menu**, go to *Hierarchies > Competencies*.
2. Click **Manage Competencies**.
3. Click the name of the competency framework you wish to update.
4. Click the **Delete** icon () in the **Actions** column for the corresponding competency item.
5. 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**.

Moving a competency item

1. In the **Administration menu**, go to *Hierarchies > Competencies*.
2. Click **Manage Competencies**.
3. Click the name of the competency framework you want to update.
4. Click the **Move up** (↑) or **Move down** (↓) icon in the **Actions** column for the corresponding competency item to rearrange the order items display.



Moving competency **Parent** items up or down in a framework list will move all associated child competency items.



A child competency cannot be removed from a **Parent** item via the **Move up** or **Move down** options. To change a competency **Parent** use the **Edit** icon.

← Back to all competency frameworks

Example Competency Framework 2

Search Example Competency Go Add new competency

Bulk actions Hide details

Name	Linked courses	Actions
People Management <small>Description:</small> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed feugiat quam in lectus condimentum, ut malesuada massa malesuada. Praesent dictum lacus id arcu molestie congue. Ut auctor massa sed laoreet suscipit. Proin bibendum neque efficitur semper convelis. Cras varius magna turpis, sit amet consectetur arcu efficitur ut. Pellentesque sit amet turpis leo. Vestibulum nisi sapien, pharetra sit amet maximus id, accumsan quis magna. Vivamus dui augue, faucibus quis elevari quis, convelis ut lorem. Duis ultrices sit amet eros vitae elevari. Utam luctus tortor quis lorem interdum feugiat. Aliquam nec tellus odio. Cras non lobortis justo. <small>Type:</small> Strategic <small>Link to resources:</small> Totara Learning	0	⊕ ⊖ ✕
• Training and Development	3	⊕ ⊖ ✕
• Managing Performance	0	⊕ ⊖ ✕
• Coaching and Mentoring	0	⊕ ⊖ ✕
• Team Building	0	⊕ ⊖ ✕
• Personal Development	0	⊕ ⊖ ✕
• Career Progression	0	⊕ ⊖ ✕
• Professional Development	0	⊕ ⊖ ✕
• Commitment to Excellence	0	⊕ ⊖ ✕
• Structured Thinking	0	⊕ ⊖ ✕

Bulk actions

Bulk actions allow you to **Add**, **Delete**, **Move** and **Reclassify** 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. In the **Administration menu**, go to *Hierarchies > Competencies*.
2. Click **Manage Competencies**.
3. Select the name of the competency framework to which you want to add the competency items.
4. Select **Add** from the **Bulk actions** dropdown menu.
5. Select the **Parent** competency.
6. Set the Competency Type (optional).
7. Enter each competency item you wish to add on a new line (i.e. one per line).
8. Select the **Aggregation method**.
9. 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 Example Competency Framework 2

Parent*

Type

Enter Competency names (one per line)
Training and Development
Managing Performance
Coaching and Mentoring
Team Building

Aggregation method*

Scale

Delete competency items

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

1. In the **Administration menu**, go to *Hierarchies > Competencies*.
2. Click **Manage Competencies**.
3. Click the name of the **Competency framework** from which you wish to delete competency items.
4. Select **Delete** from the **Bulk actions** dropdown menu.
5. Select the **Available Competencies** you wish to delete and click **Add>** to transfer them to the **Selected Competencies** area (hold Ctrl down on the keyboard to select multiple items).
6. Click **Delete selected competencies**.
7. A warning message is displayed, click **Yes** to confirm.

The selected competency items will be deleted.

Bulk delete competencies

Available Competencies Selected 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

Test competencies

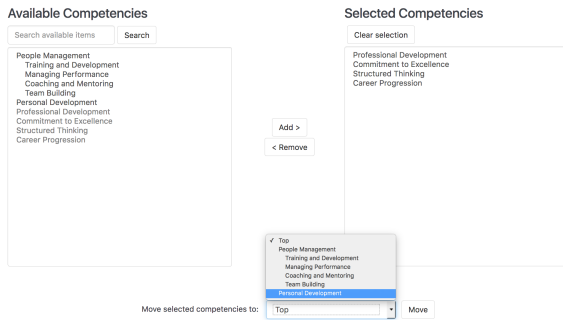
Bulk move competency items

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

1. In the **Administration menu**, go to *Hierarchies > Competencies*.
2. Click **Manage Competencies**.
3. Click the name of the Competency framework where you wish to move Competency items in bulk.
4. Select **Move** from the **Bulk actions** dropdown menu.
5. Select the **Available Competencies** you wish to move and click **Add>** to transfer them to the **Selected Competencies** area (hold Ctrl down on the keyboard to select multiple items).
6. From the **Move selected Competencies to:** dropdown menu, select the **Parent** competency where you wish to move the selected competency items.
7. Click the **Move** button.
8. A warning message is displayed, click **Continue** to confirm. Alternative you can click **Cancel** if you do not wish to continue.

The selected Competency items are now moved.

Bulk move competencies



Reclassify competency items

In the **Bulk actions** dropdown list select **Reclassify** to assign multiple Competency items to a new Competency Type. For instructions on reclassifying competencies please see [Competency Types](#).

Assigning linked courses to competencies

Once you have set up competency items you can link them to any number of courses which may be completed to achieve a level of proficiency for the competency.

Competencies assigned to a course can be:

- **Mandatory:** Mandatory courses must be completed by the learner. When creating a [Learning Plan](#) for a user that is set to automatically import competencies, the learner's competencies and linked mandatory courses are automatically pulled into the plan the learner is not able to delete them.
- **Optional:** Optional courses are suggested courses that the learner could complete to help them meet a competency. When creating a [Learning Plan](#) for a user that is set to automatically import competencies, the learner's competencies and linked optional courses are automatically pulled into the plan but the learner may have permission to delete them.

When the learning plan template is set to **automatically assign competencies from position** and/or **automatically assign from organisation** as well as to **Include linked courses**, courses linked to competencies automatically appear in a learner's Learning Plan when they create one.

To link courses to a competency:

1. In the **Administration menu**, go to *Hierarchies > Competencies*.
2. Click **Manage competencies**.
3. Select the name of the competency framework you wish to update.
4. Click the name of the competency item to which you want to add linked courses.
5. Click **Assign course completions**.
6. Select the course(s) you wish to assign to the competency.
7. Click **Save**.
8. Set the **Link type** this affects whether the course is mandatory or optional. The default state is **Optional**.
9. Click **Return to competency framework** when finished.

You can remove a selected course by clicking the **Delete** icon () under **Options**.

Assign course completions ✕

BROWSE SEARCH

- Miscellaneous
 - Example course 1
 - Example course 2
 - Example course 3

Items to add

- Example course 1
- Example course 2
- Example course 3 ✕

To remove any courses from the **Items to add** list, hover over the name of the course and use the **Delete** icon (✕).

Example Competency Framework 2 - Training and Development ⚙

Full name: Training and Development
Type: Unclassified
Competency aggregation method: All

Related Competencies

Competency framework	Name	Options
No related competencies		

Linked courses

Name	Link type	Options
Example course 1	Mandatory	✕
Example course 2	Mandatory	✕
Example course 3	Optional	✕

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. In the **Administration menu** go to *Hierarchies > Competencies*.
2. Click **Manage Competencies**.
3. Select the name of the competency framework you wish to update.
4. Select the required format under **Export all items from framework**
5. Click **Export all items**.
6. Select Open or Save to view or save the export file.

Export all items from framework ^o

Format:

Read more about how Totara can help with [competency-based training](#) on our website.