

Goal Types

Administrators can create and assign types of goals. If a goal is assigned a type, it inherits any custom fields that have been assigned to that type. This allows you to organise meta-data relating to your goals and only show the fields that each sort of goal needs.

The values of these custom fields will be displayed alongside the goal on the learner's *Appraisals > My Goals* page as well.

(This video is taken from the [Goals](#) course in the Totara Academy, where you can access more resources and learning materials - including other videos).

Company versus personal goal types

Goal types can be created for and assigned to both company and personal goals. The key difference is in how the associated custom fields and their field values are applied to specific company and personal goals to which they are assigned.



Company and personal goal types are completely separate. If the same custom fields are needed for both company and personal goals they will have to be created separately.

Company goal types

Within the context of a given framework, specific goals can be created and assigned a company goal type.

The custom fields defined in the associated company goal type are linked to the company goal and the values for the custom fields are assigned by the goal administrator. Therefore, each goal can only have a single custom field value across the site.

Personal goal types

Personal goals can be created and assigned a personal goal type.

The custom fields defined in the associated personal goal type are linked to an individual user's goal assignment instead of the goal itself. This allows each individual user to specify different custom field values for the assigned personal goal.

Create a goal type

The process is similar for creating both company and personal goal types with one difference, personal goal types support Availability controls using audiences.

1. Go to *Site administration > Hierarchies > Goals > Manage company goal types* or **Manage personal goal types**.
2. Click the **Add a new company goal type** button or the **Add a new personal goal type** button.
3. Enter a **Type full name** that describes this type. This is the value that will be shown when a new goal is being created and the user can select the type of goal.
4. Enter a **Goal type ID number**; an optional ID number used to keep track of the type.
5. Enter a **Goal Type Description** to provide additional detail about this type.
6. Select a **Goal type availability**. This only applies to personal goal types. Options are **Available to all users** (default) and **Available only to certain audiences**.
 - a. If 'Available only to certain audiences' is selected the **Add audience(s)** button appears allowing you to select from the list of audiences defined in the system. When one or more audiences are selected, only users in those audiences will have the option of selecting this goal type when adding their own personal goals.
 - b. If a user has created a goal of a specific type and they subsequently lose access to that type (due to changes to either the assigned audiences for that type or audience membership) the user keeps access to goals of that type that they created when they did have access however, they can no longer create new goals of that type.
7. Click the **Save Changes** button.

Create type custom fields

Custom fields can be added by going to the type overview page for a particular company or personal goal type.

1. Click on the linked **Name** of the type.
2. Choose the type of custom field that will be created. This could include:
 - **Checkbox**: Used for **Yes** and **No** entry.

On this page



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

- **Date/time:** Allows the user to enter a date and, if selected, a time.
 - **File:** Includes a file upload option.
 - **Menu of choices:** Creates a dropdown of choices.
 - **Text area:** Allows for a large amount of text to be entered and formatted using the HTML editor.
 - **Text input:** Allows for a short amount of text to be entered with no formatting.
3. A custom field creation page will appear. Configure the common [settings](#) to your preferences.
 4. [Specific settings](#) based on the type of custom field will be displayed at the bottom of the page.
 5. Click the **Save Changes** button at the bottom of the page.

Settings

Setting	Description	Notes
Full name	Enter a title for the field that will be displayed on the goal page as well as in reports.	-
Short name	Enter a unique short name for the field.	-
Description	Enter a brief description of the field.	-
This field is required	When set to Yes , this field will be mandatory for users to enter when creating a goal of this type.	-
Is this field locked?	When set to Yes , the custom field will only display the information set when the field was set up. The field cannot be edited.	-
Should the data be unique	When set to Yes , the custom field will only accept a unique value. If a duplicate value is used in this field, the system will not allow the item to be saved. When set to No , the custom field will accept any value in the field.	-
Hidden on the settings page?	When set to Yes the custom field will not be visible on the settings. When set to No the custom field will be visible.	-

Specific settings

As well as the common settings shown above, each goal type has specific settings.



There are no specific settings for the **File** type.

Checkbox

Setting	Description	Notes
Checked by Default	When set to Yes , the checkbox value will be set to Yes by default.	-

Date/time

Setting	Description	Notes
Start year	Select the year that will be the beginning of the date range.	-
End year	Select the year that will be the end of the date range.	-
Include time?	When checked, the time will need to be entered along with the date.	-

Menu choices

Setting	Description	Notes
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Menu options	Enter the list of options that the user will be able to select in a dropdown. Enter one option per line.	-
Default value	Set the default value that will appear in the dropdown box. The default value must appear in the menu options above. Leave blank if there is no default entry required.	-

Text area

Setting	Description	Notes
Default value	Default value is the text that will appear in the text area by default. Leave this field blank if no default text is required.	-
Columns	Sets the width of text area that will be available.	-
Rows	Set the height of the text area that will be available (number of lines).	-

Text input

Setting	Description	Notes
Default value	Default value is the text that will appear in the text area by default. Leave this field blank if no default text is required.	-
Display size	Display size sets that number of characters that will be displayed in the text field.	-
Maximum length	Maximum length sets the maximum number of characters the text field will accept.	-

Bulk re-classification

Bulk re-classification is only available for company goal types.

If the data collected in a custom field and/or the associated company goal needs to be moved into a custom field in a different company goal type, there is a bulk re-classification tool available.

1. Go to the **Bulk re-classification** section of the **Manage company goal types** page.
2. Using the dropdown, select the type that contains the fields that need to be reclassified.
3. Select the **New type** for the fields by clicking the **Choose** button next to the appropriate type.



To transfer the data collected in custom fields as well as transfer the company goal, the new class must contain the same type of custom field (checkbox, text input, etc.).

If data has been collected and you wish to transfer the company goal and delete the data collected in custom fields, choose the Re-classify items and delete data option. If no data has been collected so far, you will just be given the option to re-classify the company goals.

4. Click the **Re-classify items** button to proceed.

The company goals will be automatically moved to the new company goal type and any data that was already collected in the fields will also be moved, if you chose to do so.

Cancel

Reclassifying 4 goals - step 1 of 2

Select the new type.

Current type

Name Unclassified

Custom fields No custom fields

New type

Choose

Company Values

Customer First (Text area)
challenge the status quo (Menu of choices)
Be Helpful (Text input)

Choose

Increase Sales

No custom fields