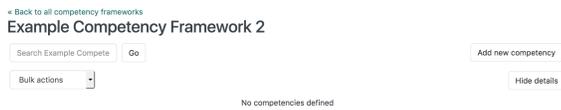


# Competency Items

## 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
<b>Competency framework</b>	This field cannot be edited and simply shows the selected competency framework.	This field cannot be edited and simply displays information.
<b>Parent</b>	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 <b>Top</b> .	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).
<b>Name</b>	Enter the name of competency item.	-
<b>Competency ID number</b>	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 <b>Record with this ID number already exists</b> .
<b>Description</b>	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.	-
<b>Type</b>	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 <a href="#">Competency Types</a> 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.
<b>HR Import?</b>	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 <b>MUST</b> have a value to enable this field as per the <a href="#">HR Import settings</a> .

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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.

<b>Aggregation method</b>	<p>The aggregation method sets how the system will calculate the competency achievement. The options are:</p> <ul style="list-style-type: none"> <li>▪ <b>All:</b> This means that all the child competencies will have to be achieved for the parent competency to be declared achieved.</li> <li>▪ <b>Any:</b> This means that only one of the child competencies needs to be met to successfully achieve the parent competency.</li> <li>▪ <b>Off:</b> Automatic achievement will be deactivated for this competency. (It may still be marked achieved manually.)</li> </ul>	
<b>Scale</b>	<p>This is the <a href="#">Competency Scale</a> 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 Compete

Bulk actions

Name	Linked courses	Actions
• People Management <b>Description:</b> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed feugiat quam in lectus condimentum, ut malesuada massa malesuada. Praesent dictum lacus ut eros molestie congue. Ut ac tunc massa sed lacus nascipit. Proin bibendum neque efficitur ametper convelit. Cras velus magna turpis, ac amet consectetur eros efficitur ut. Pellentesque sit amet turpis leo. Vestibulum risit sapien, pharetra sit amet maximus id, accumsan quia magna. Vivamus dui augue, faucibus quis elevari dui, convelit ut lorem. Duis ultrices sit amet eros vitae placere. Etiam luctus turtor quis lorem interdum feugiat. Aliquam nec tectus odio. Cras non lobortis justo. <b>Type:</b> Strategic <b>Link to resources:</b> 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

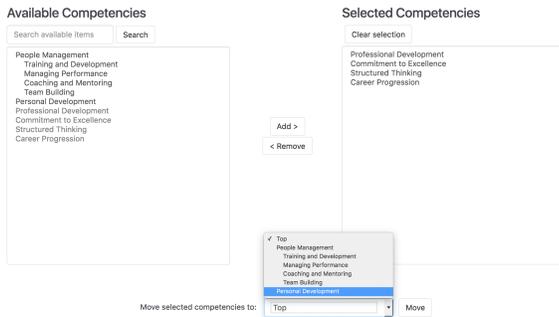
## Bulk move competency items

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**.

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

## 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.

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