TOTARA PERFORM:

ASSIGNING COMPETENCIES

This is a transcript of a video on the Totara Academy

SO YOU'VE CREATED A COMPETENCY FRAMEWORK AND ADDED COMPETENCIES TO IT. HOW DO YOU ASSIGN COMPETENCIES TO YOUR USERS? THAT'S WHAT WE'LL COVER IN THIS VIDEO.

To get started, I'll select **Manage competency assignments.**

On this page you'll find a list of all the competency assignments that have been made on your site. You'll see the competency name, the assignment criteria, detail about the criteria used, for example, the name of the audience or the individual it was assigned to, and the status of the assignment.

You'll also see a warning if the competency has an achievement path that needs review.

There are a few things to note here. Firstly, because an individual competency could be assigned in different ways, it's likely that competencies will appear multiple times in this list, as you can see here. Remember that this is a list of competency assignments, not competencies themselves.

Secondly, there are three statuses to be aware of. An assignment can be in **Draft** (so no users have yet been assigned the competency through this assignment), **Active** (meaning users have been assigned the competency and can be measured against it) and **Archived** (meaning that progress towards proficiency is no longer tracked).

You'll notice that you only have the option to delete **Draft** and **Archived** assignments. If you do so, they'll disappear from this view. Think carefully before deleting an assignment, because all record of achievement based on this assignment is also deleted.

If an assignment is **Active** you must first **Archive** it before deleting it, to prevent assignments from being accidentally deleted.

You might be thinking that the list of assignments on your site will get very long. But don't worry, we've got lots of tools to help you manage this. On the left here you can search for a competency assignment, filter by the assignment type, or restrict the view to show only competencies within a certain framework.

And if your list is longer than 20 items, you'll be able to use the **Load more** button when you're ready to see further assignments

You can make bulk changes to competency assignments through this page. Let's say that I want to activate a number of draft assignments. I can easily select the competency assignments from the list which adds them to my selection at the top.

To activate them, I'll use this dropdown list.

I get this warning because activating the competencies will assign them to users in the system and start tracking their progress. I'll select Yes to proceed and activate the assignments.

Let's imagine I now want to assign some competencies from a new Leadership Success Profile framework. I'll select **Create assignments**.

Here I can see all of the competencies available on my site. I'll filter this list to show just the framework I want to use.

This list shows the parent competencies in the framework. To see the child competencies associated with these, select the arrows.

I want to assign all of these competencies so I'll use the select all checkbox. It's important to note that this only selects the competencies in the current view, not the child competencies or competencies below the **Load more** button.

If you wanted to add child competencies too, you would simply choose to view **All children** before selecting all.

The competencies have been added to my shopping basket ready for assignment.

I'm happy with the competencies I've got in my basket so I'll move on to **Assign**.

In Totara Perform you've got four ways to assign competencies; by audience, position, organisation and individual. You can also allow team members to self-assign competencies.

I want to assign my chosen competencies to all users with the position of Developer or Lead Developer.

I can select as many positions as I need then **Save changes**.

If you want to check which users will be affected by this assignment, you can do so here.

Once you're ready, select **Create assignments**.

You can decide to create these assignments in draft status, or activate them immediately using this checkbox. I'll create draft assignments and just select **Yes**.

I'm taken back to the **Manage competency assignments** page, where my assignments will be listed. When I'm ready to activate them, I can perform a search and then use the bulk action tool to activate them.

Again, I see this warning message to remind me that this action will assign the competencies and start tracking team members against them.

My competencies are now assigned to my users.

For some competencies, the same proficiency level might be appropriate for all users. But for others, you might require different levels of proficiency from different users. For example, you may consider junior staff to be proficient in a competency if they are 'competent with supervision', while more senior team members would only be considered proficient once competent independently. So once you have created your competency assignments you can override the proficiency value set by the scale for a particular competency assignment.

Here I can see a competency that has been assigned to a particular audience.

If I select the competency assignment, I can choose to **Edit** it.

Here I can see the default proficiency value set by the scale. But I can choose to change the proficiency value if I want to. This only affects the selected competency, for this particular assignment. Other users assigned this competency through other methods (for example, users who were assigned via a different audience, or who self-assigned the competency) will not be affected.

This column here indicates which competency assignments have been overridden, and you can choose to reset them at any time.

There's one final useful tool to look at which is the **Currently assigned user report.**

This report shows you every user and every competency assignment they have. You can easily search for an individual user, or an individual competency using the search fields at the top. I'll search for an individual user.

Here I can see all of the competency assignments this user has. Note that you might see the same competency listed twice if the user has been assigned the competency in two ways; perhaps because it is both assigned to their position and an audience they are a part of.

This is an embedded report created in report builder, so you can edit the report to suit your needs if you'd like to.

So that's managing competency assignments, activating, archiving and deleting competency assignments, creating a new competency assignment and using the user assignments report in Totara Perform. Why not start drafting your competency assignments today?

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