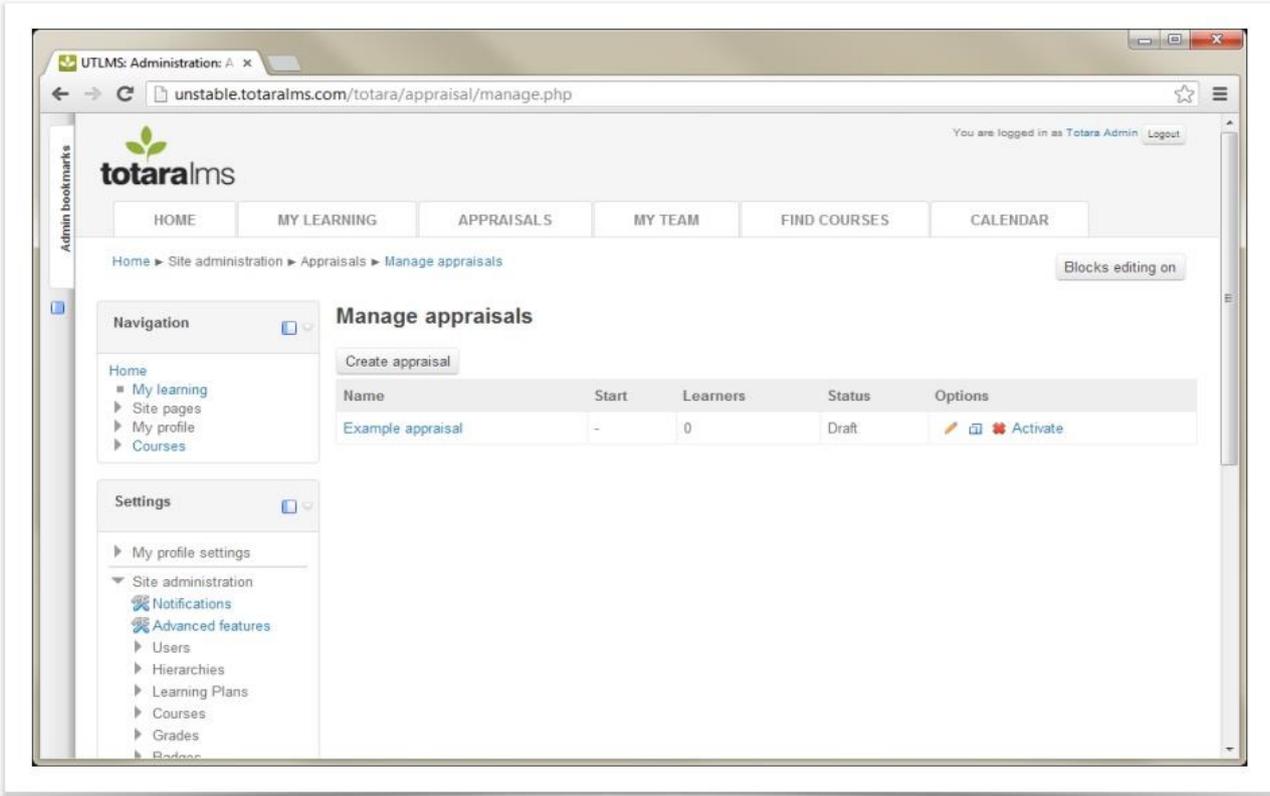# Managing Appraisals

Manage appraisals

Totara LMS provides an appraisal form builder to allow an administrator to create custom appraisal forms and assign the forms to groups of people within their organisation. Typically the appraisal process takes place over a specific time-frame, so administrators can define specific 'Stages' during which certain actions must be completed. It is also possible to notify participants that actions are required or are overdue.

Appraisal forms are managed site-wide by going to *Site administration > Appraisals > Manage appraisals*.

An overview of existing appraisals will be displayed, including the name, start date, number of learners assigned, status of the appraisal, and a series of options to edit, copy, delete, or activate the appraisal.
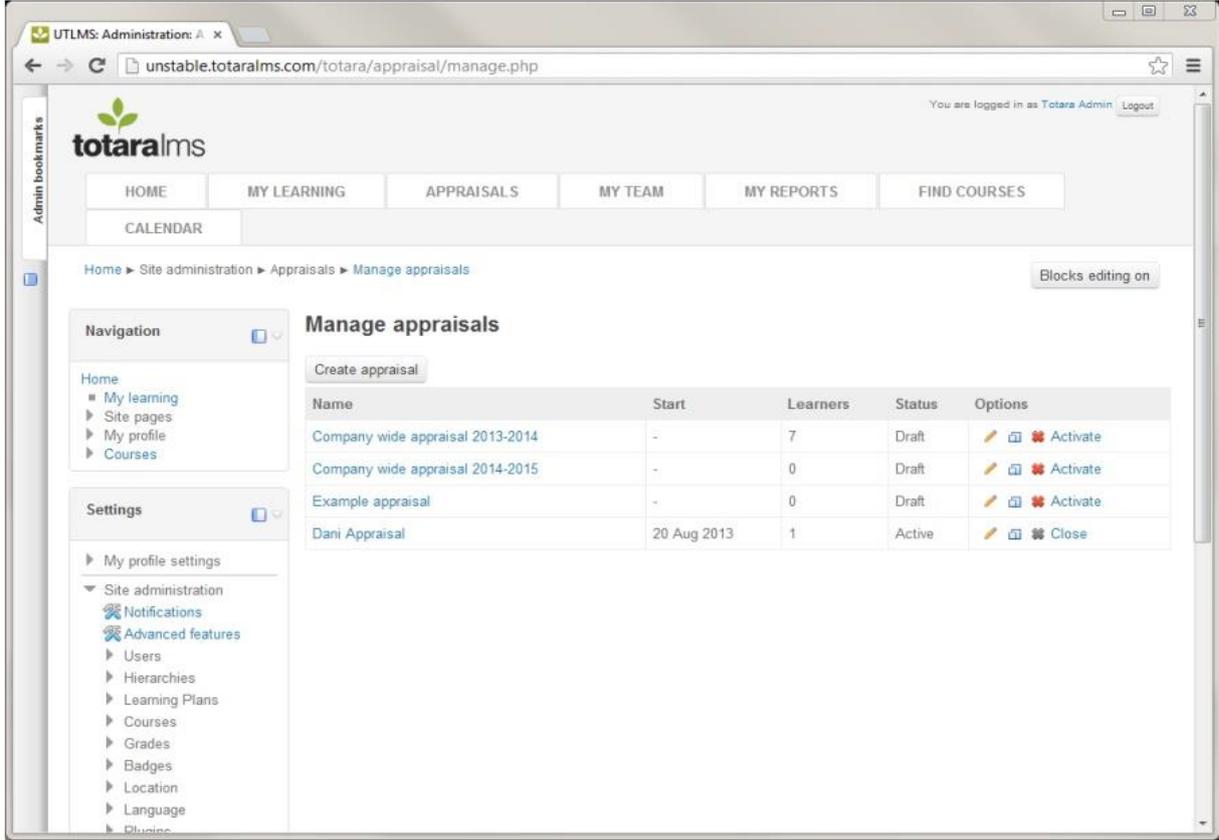

Note
The number displayed in the 'Learners' column have a different meaning depending on the appraisal status.

- Draft - contains the number of currently assigned users
- Active - contains the number of assigned users who haven't yet completed the appraisal
- Closed - contains the total number of users who have been assigned at any point while the appraisal was active

Modify an appraisal

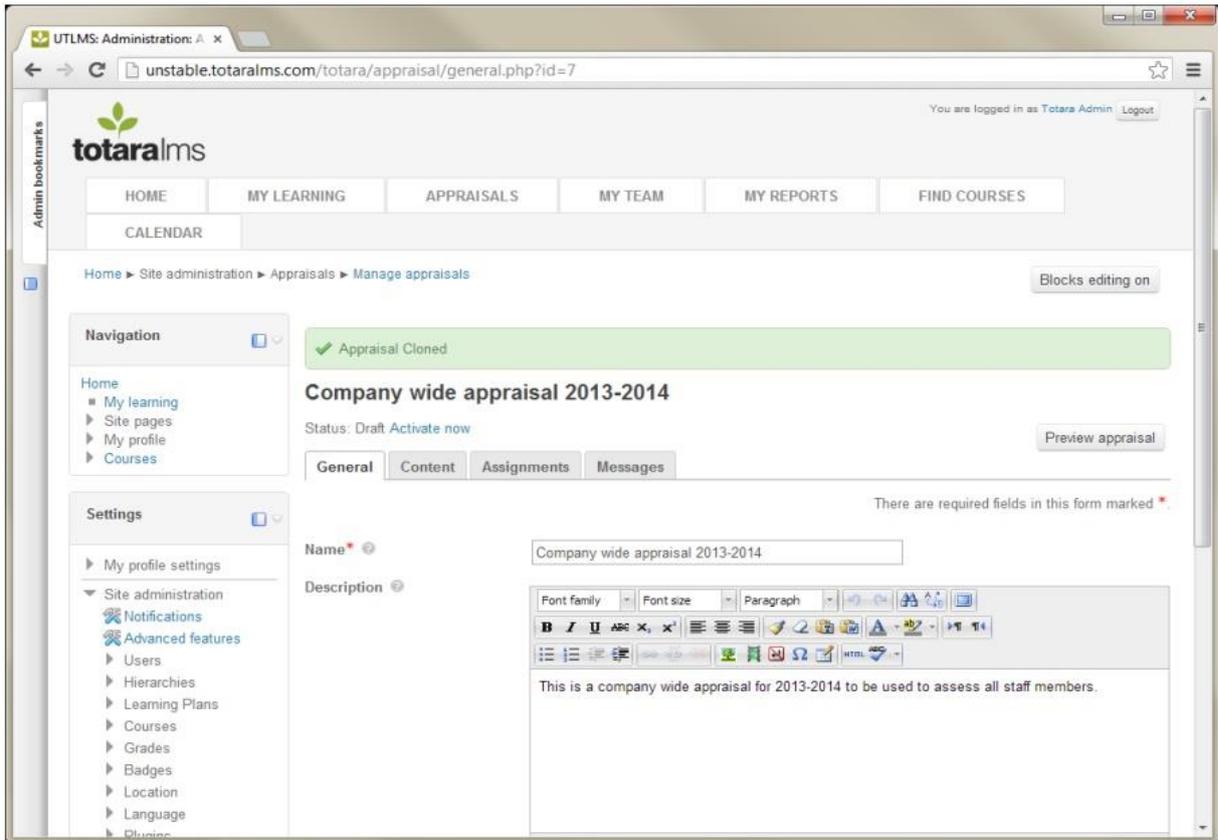Existing appraisals can be modified until they have been activated and made available to users.

To modify an existing appraisal, select the **Settings** (pencil icon) button under the *Options* column.
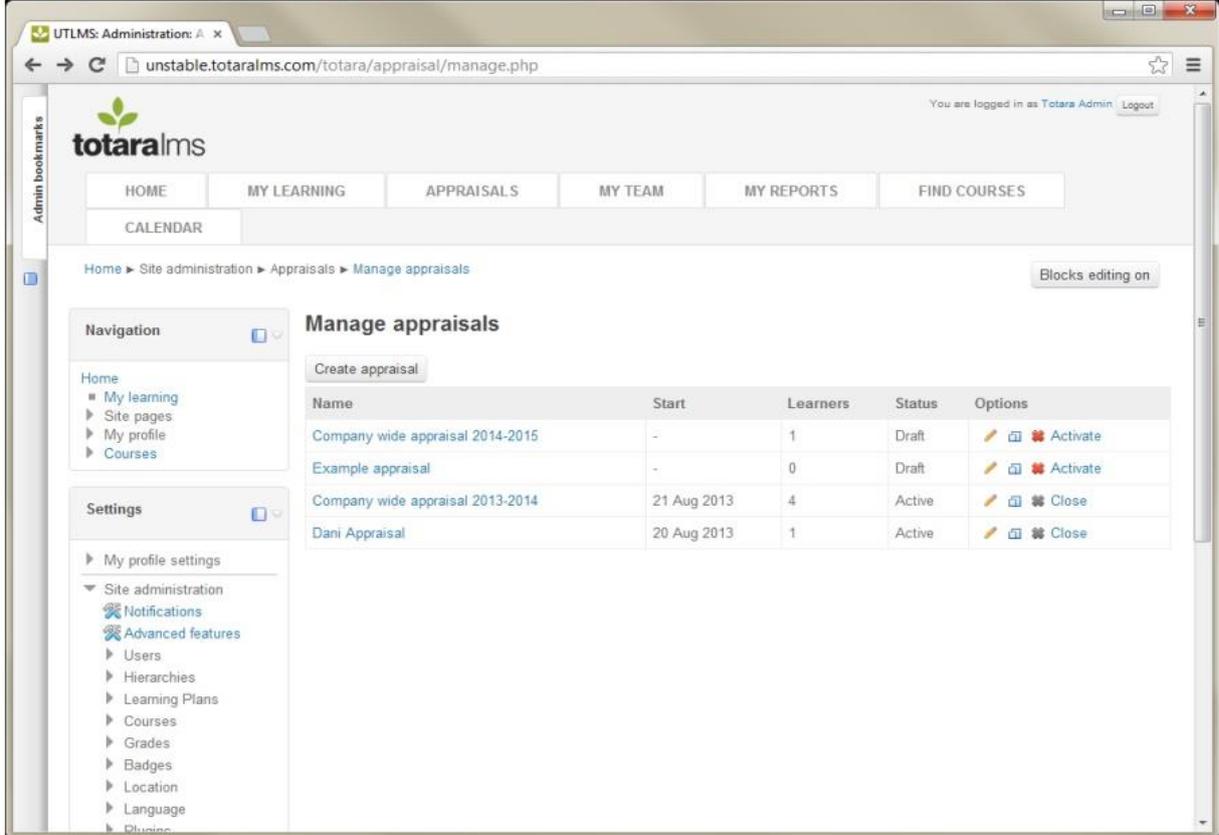
To duplicate an appraisal, including all of the stages, pages, and elements, select the **Copy** button. A cloned copy of the appraisal will appear that you can update.

Close an appraisal

If an activated appraisal needs to be removed from the users assigned for some reason, it can be closed. This means that users do not need to complete the appraisal and will stop receiving notifications about it. After an appraisal is closed, it can also be deleted using the **Delete** button under the *Options* column.
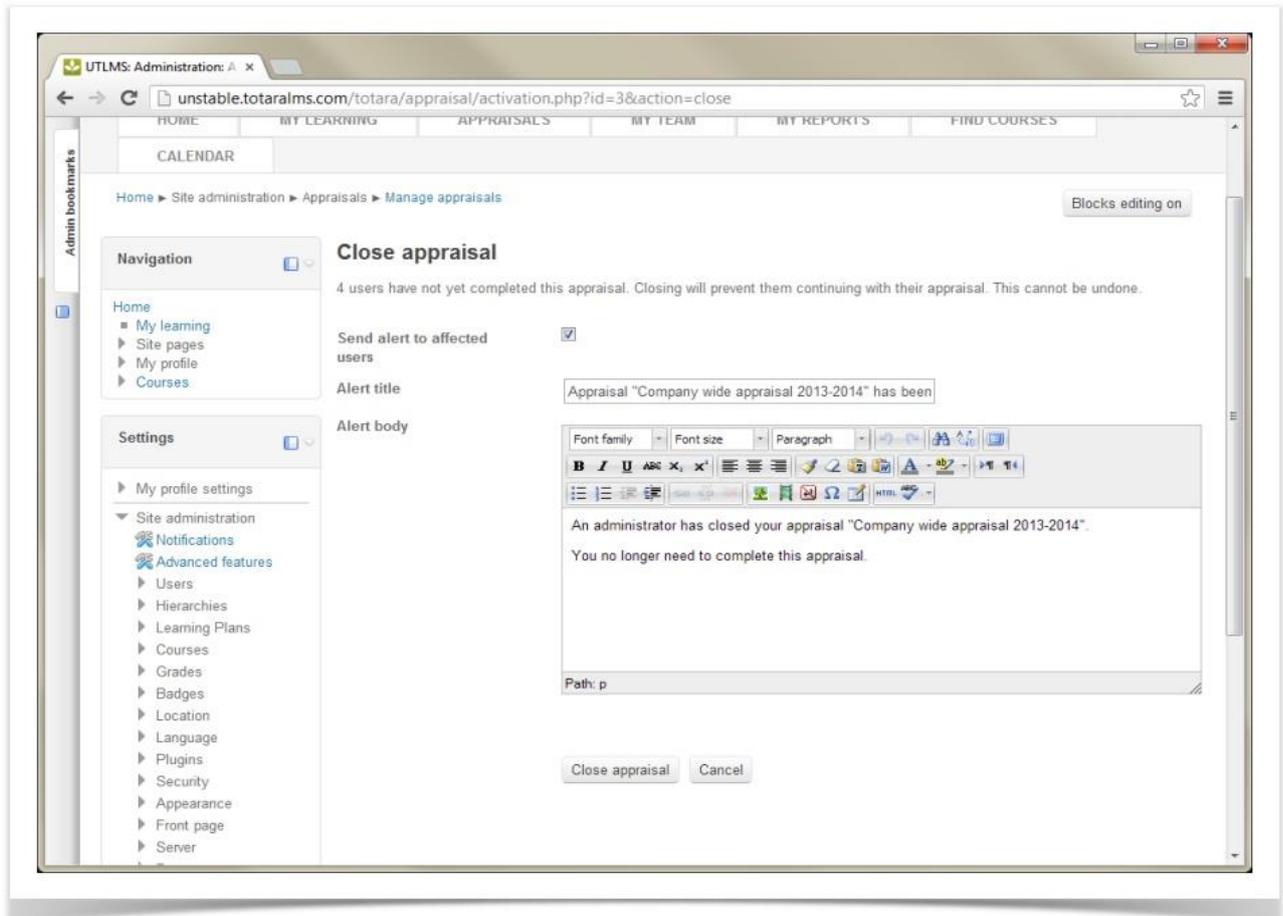
The *Activate* link in an activated appraisal turns into a *Close* link. Note that the delete button is greyed out because an active appraisal cannot be deleted.

1. Select the **Close** link to end the appraisal. The number of users who have not completed the appraisal will be displayed.
2. Check **Send alert to affected users** if users should receive a notification that the appraisal is being closed.
3. Enter an **Alert title** which will be the subject line of the email notification users receive. This will also be the line that appears on the user's dashboard alerts.
4. Enter an **Alert body** which will be the body of the email notification users receive. This will also be available if the user clicks the information icon in the dashboard alerts area to get more detail on the notification.
5. Click the **Close appraisal** button.

UTLMS: Administration: A ×

← → C 🗋 unstable.totaralms.com/totara/appraisal/activation.php?id=3&action=close

HOME   MY LEARNING   APPRAISALS   MY TEAM   MY REPORTS   FIND COURSES

CALENDAR

Home ► Site administration ► Appraisals ► Manage appraisals

Blocks editing on

Close appraisal

4 users have not yet completed this appraisal. Closing will prevent them continuing with their appraisal. This cannot be undone.

Send alert to affected users   ☑

Alert title   Appraisal "Company wide appraisal 2013-2014" has been

Alert body

Font family | Font size | Paragraph

B I U ABC X₂ X²

An administrator has closed your appraisal "Company wide appraisal 2013-2014".

You no longer need to complete this appraisal.

Path: p

Close appraisal   Cancel

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