

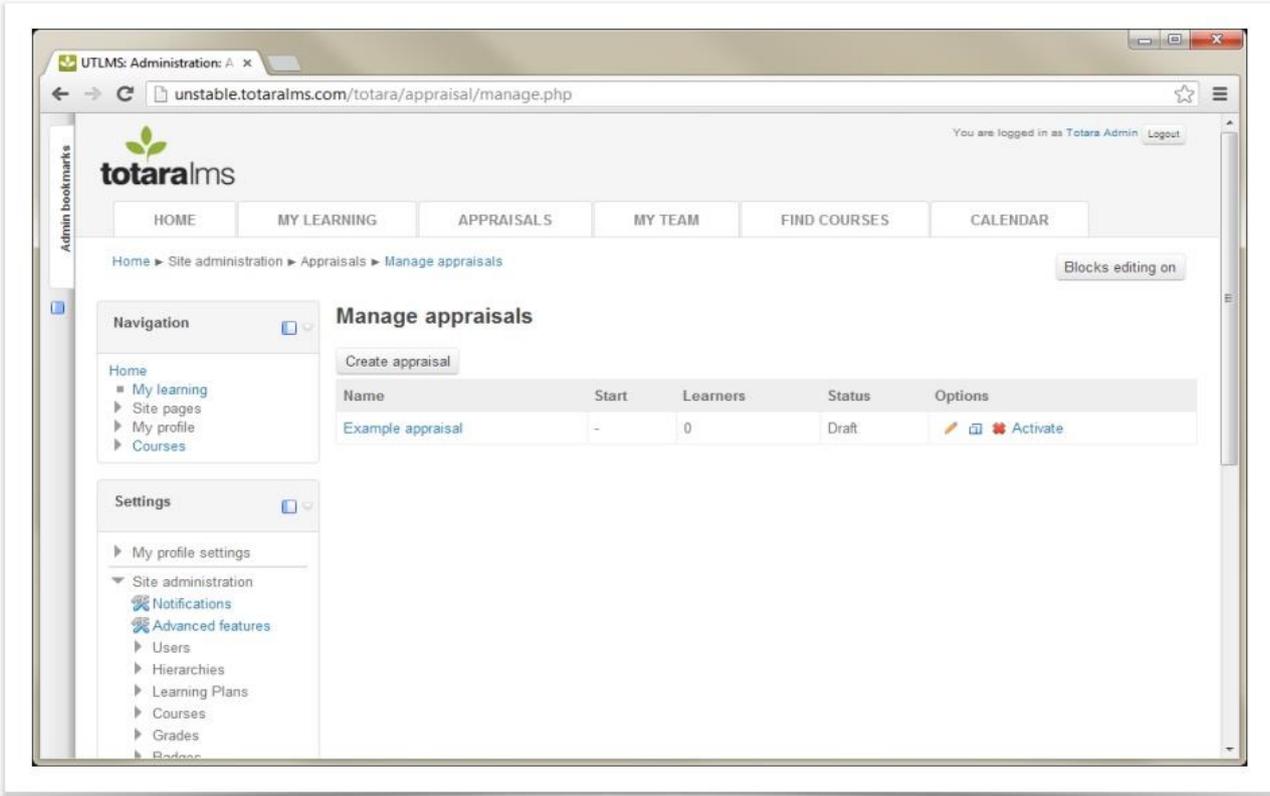
Managing Appraisals

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.



The screenshot shows the 'Manage appraisals' interface in the Totara LMS. The page title is 'Manage appraisals' and the breadcrumb trail is 'Home > Site administration > Appraisals > Manage appraisals'. A 'Create appraisal' button is visible at the top. Below it is a table with the following data:

Name	Start	Learners	Status	Options
Example appraisal	-	0	Draft	✎ 📄 🗑️ 🔄 Activate

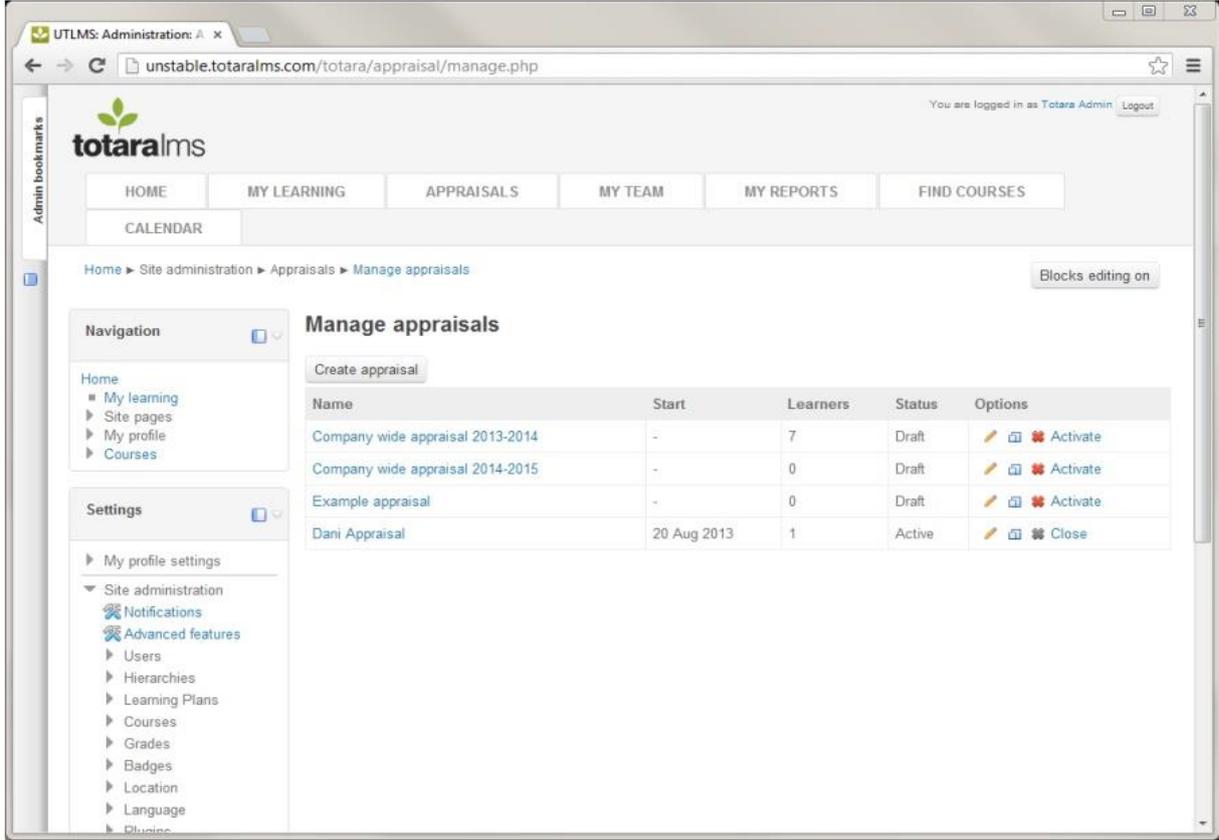
Note

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.

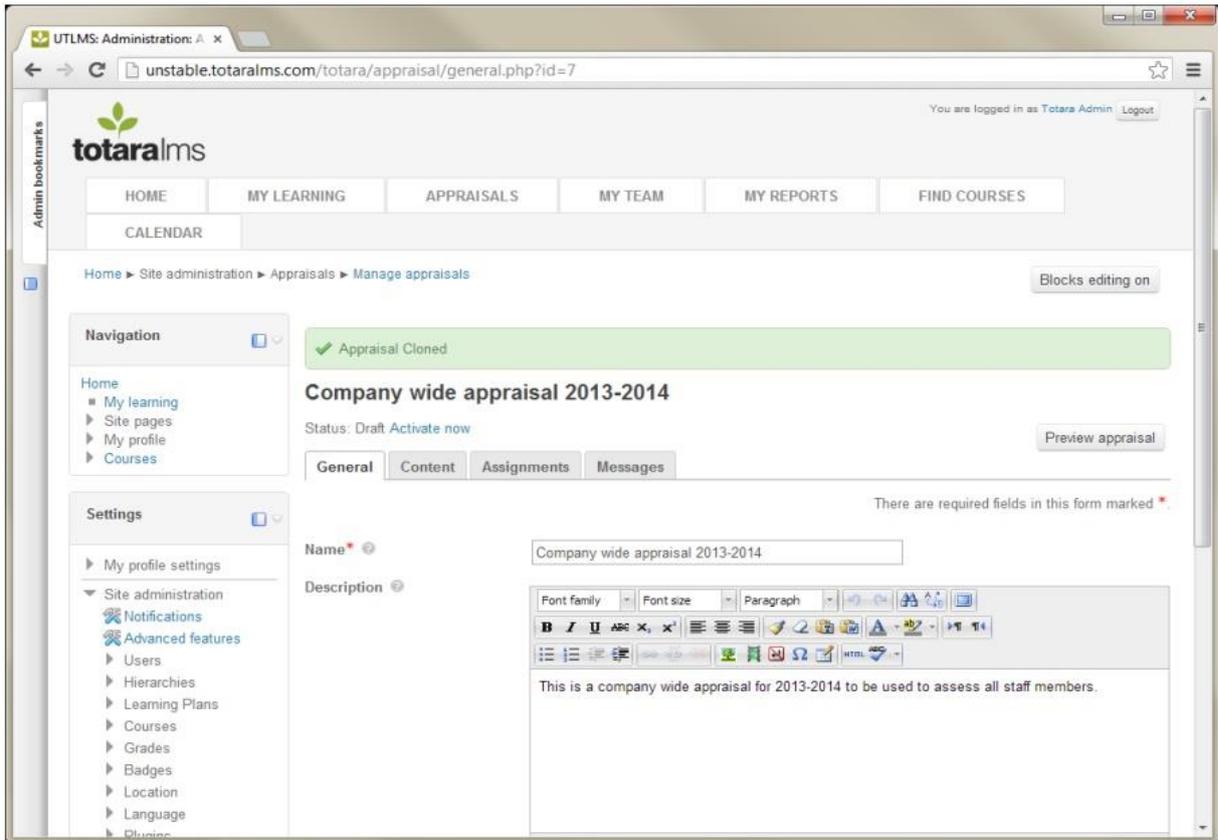


The screenshot shows the 'Manage appraisals' page in the Totara LMS Administration interface. The page includes a navigation menu, a breadcrumb trail, and a table of appraisals. The 'Options' column contains buttons for 'Settings' (pencil icon), 'Copy', and 'Activate'.

Name	Start	Learners	Status	Options
Company wide appraisal 2013-2014	-	7	Draft	Activate
Company wide appraisal 2014-2015	-	0	Draft	Activate
Example appraisal	-	0	Draft	Activate
Dani Appraisal	20 Aug 2013	1	Active	Close

To modify an existing appraisal, select the **Settings** (pencil icon) button under the *Options* column.

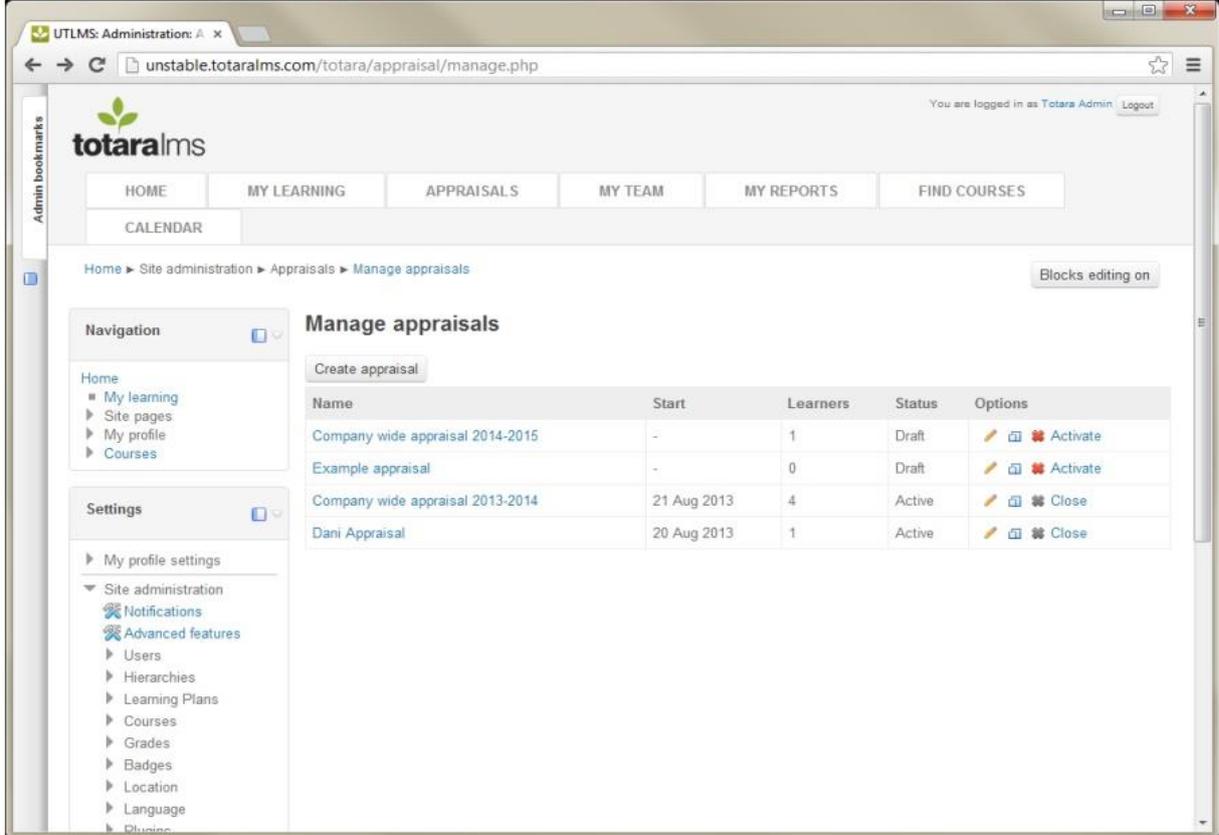
To duplicate an appraisal, including all of the stages, pages, and elements, select the **Copy** button. A cloned copy of the appraisal will appear that you can update.



The screenshot shows the Totara LMS administration interface. The browser address bar displays `unstable.totarlms.com/totara/appraisal/general.php?id=7`. The user is logged in as 'Totara Admin'. The navigation menu includes 'HOME', 'MY LEARNING', 'APPRAISALS', 'MY TEAM', 'MY REPORTS', and 'FIND COURSES'. The breadcrumb trail is 'Home > Site administration > Appraisals > Manage appraisals'. A green notification bar at the top right says 'Appraisal Cloned'. The main content area is titled 'Company wide appraisal 2013-2014' with a status of 'Draft' and an 'Activate now' link. There is a 'Preview appraisal' button. The form has tabs for 'General', 'Content', 'Assignments', and 'Messages'. The 'Name' field contains 'Company wide appraisal 2013-2014'. The 'Description' field contains the text: 'This is a company wide appraisal for 2013-2014 to be used to assess all staff members.' A rich text editor toolbar is visible above the description field. A note at the bottom right of the form states: 'There are required fields in this form marked *'.

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.

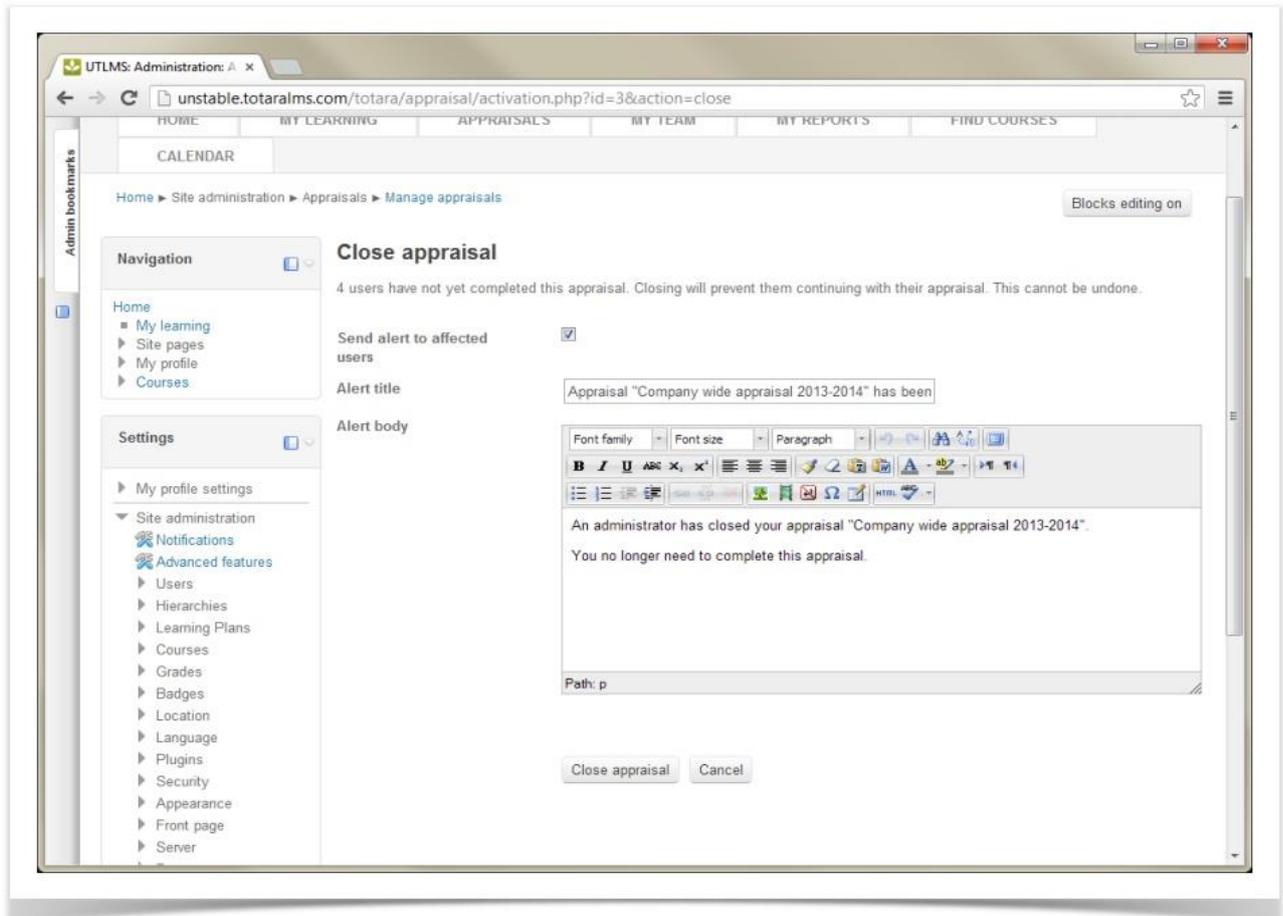


The screenshot shows the 'Manage appraisals' page in the Totara LMS. The page includes a navigation menu on the left, a breadcrumb trail (Home > Site administration > Appraisals > Manage appraisals), and a table of appraisals. The table has the following data:

Name	Start	Learners	Status	Options
Company wide appraisal 2014-2015	-	1	Draft	Activate
Example appraisal	-	0	Draft	Activate
Company wide appraisal 2013-2014	21 Aug 2013	4	Active	Close
Dani Appraisal	20 Aug 2013	1	Active	Close

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.



The screenshot shows a web browser window with the URL `unstable.totara.com/totara/appraisal/activation.php?id=3&action=close`. The page title is "Close appraisal".

Navigation:

- Home
- My learning
- Site pages
- My profile
- Courses

Settings:

- My profile settings
- Site administration
 - Notifications
 - Advanced features
 - Users
 - Hierarchies
 - Learning Plans
 - Courses
 - Grades
 - Badges
 - Location
 - Language
 - Plugins
 - Security
 - Appearance
 - Front page
 - Server

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

An administrator has closed your appraisal "Company wide appraisal 2013-2014".
 You no longer need to complete this appraisal.

Path: p