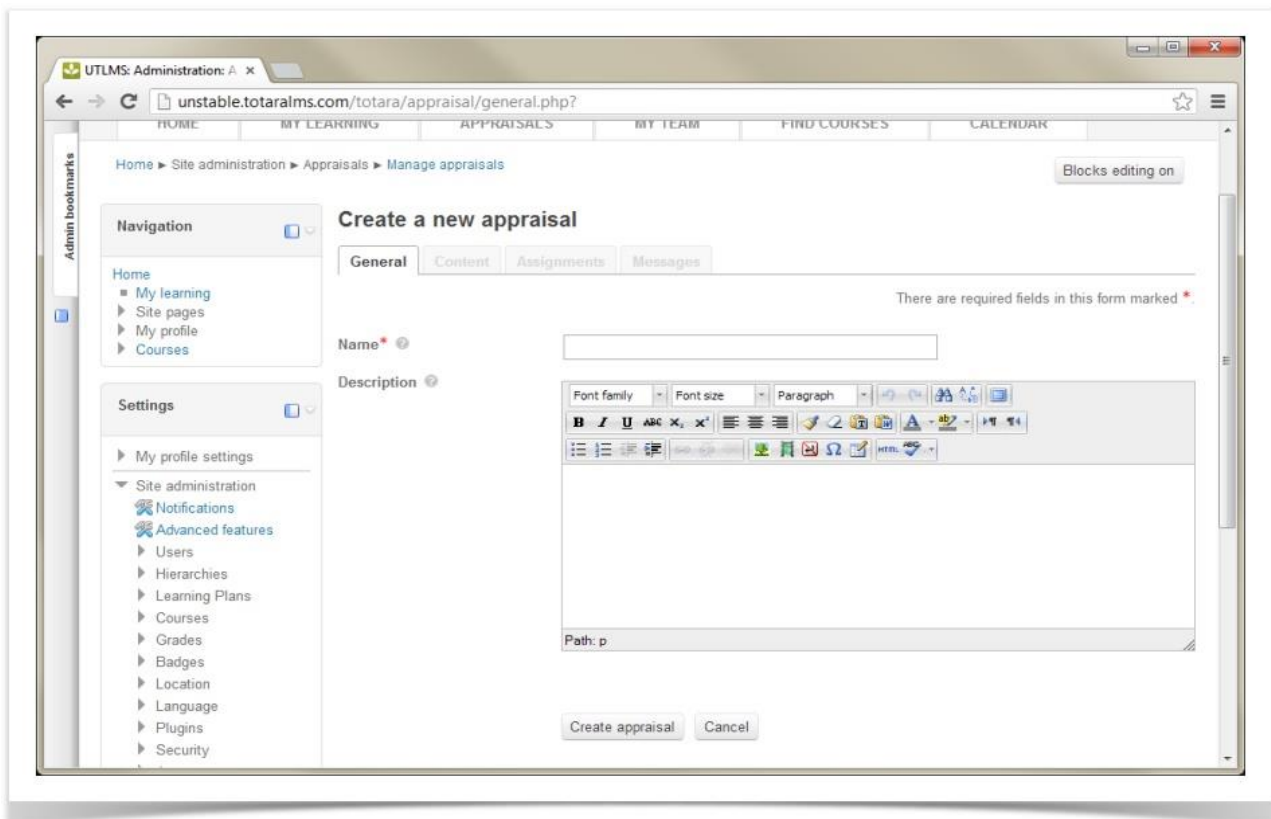# Creating Appraisals

Create an appraisal

1. To create a new appraisal, select the **Create appraisal** button.
2. Enter the **Name** of the appraisal and include a brief **Description** that will be displayed after the name.
3. Select the **Create appraisal** button.

The *Content* page will appear which contains the stages and content of the appraisal.

An appraisal consists of multiple stages. A stage is a period of time when specific actions need to be completed by certain users. Stages are used to show the users their progress through the appraisal, control when certain actions can occur and act as milestones for notifications and reporting. Each stage may contain multiple "Pages" or forms that include "Elements" such as questions or information.

Create appraisal stages

1. Select the **Add stage** button to create a new appraisal stage.
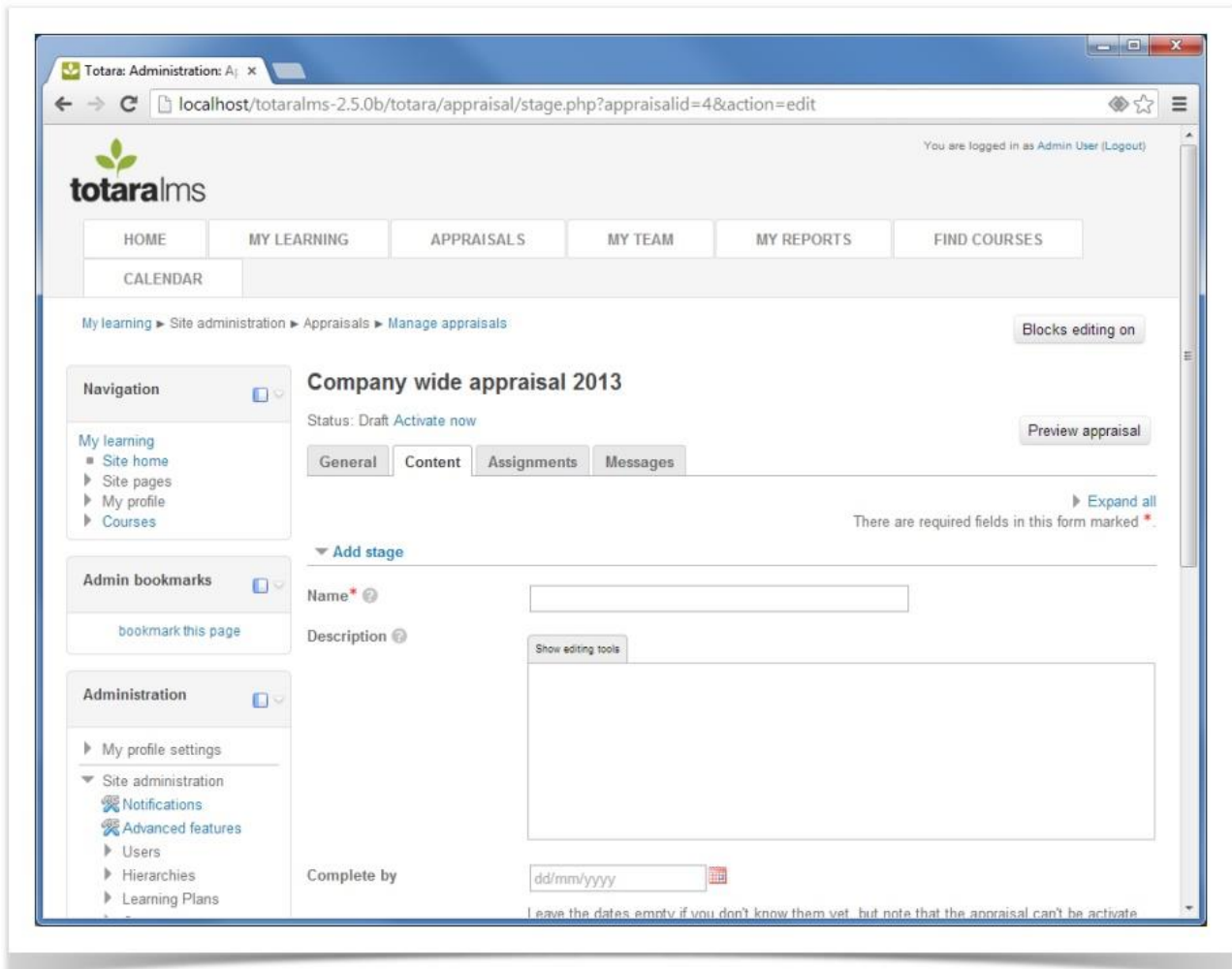
2. Complete the stage options:

- **Name:** Enter a name for the new stage that describes the stage for both administrators and the appraisal users.
- **Description:** Enter a description of this stage that provides more details on the purpose of the stage.
- **Complete by:** Enter the date that this stage must be completed by. This date is used by notifications and reporting to identify overdue appraisals. Stage completion dates also determine the order of the stages.
- **Lock stage after completion:** Place a tick in the check box next to the role(s) that should be prevented from modifying their answers on this stage after the stage has been marked as complete.
- **Page names (optional):** To create pages of questions for this stage, enter the name for each page on a separate line. You will be able to add pages later as well.

3. Select the **Add stage** button to save these settings.

After a stage has been created it can be edited or deleted using the icons under the *Options* column. You can continue adding additional stages, or begin adding pages and elements to the stage.

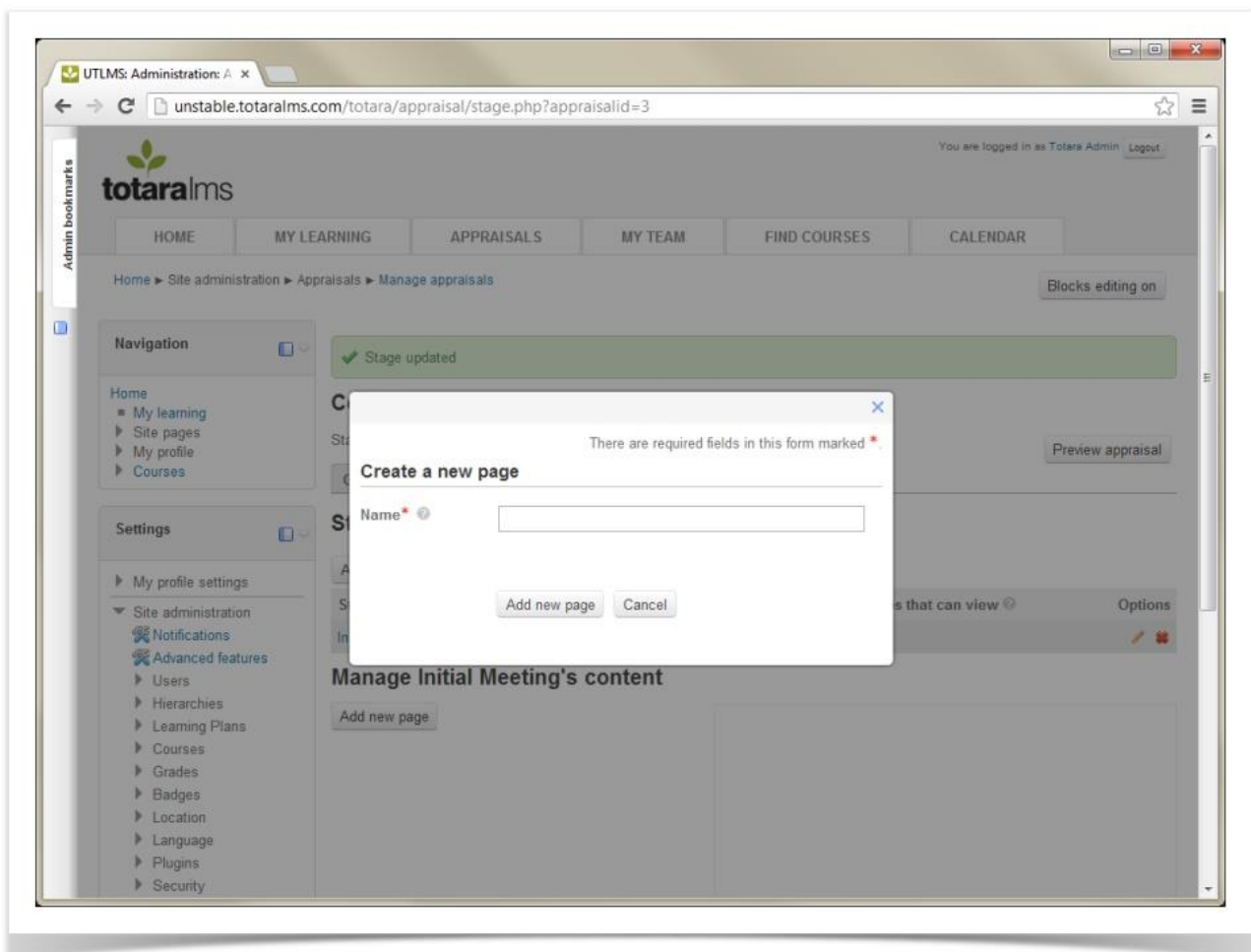## Create pages within an appraisal

Pages provide a way to break long appraisal forms into logical sections. Users completing the appraisal will only see the questions for one page at a time.

1. To add a new page and begin building out the content of the appraisal, select the **Add new page** button.
   Note
   If you have multiple stages, you will need to select the linked name of the stage first so that the page is added to the appropriate stage.

2. Enter a **Name** for this page of content and then select the **Add new page** button.

The new page will appear below the stage. The order of the pages within the stage will be the same order displayed to users completing the appraisal. Pages can be reordered using the multi-directional arrow icon, updated by select the **Settings** (pencil icon) button, or deleted by selected the **Delete** button.

To move the page to a different stage, select the multi-directional arrow icon and drag the page to the new stage. If the move is successful, the page will automatically refresh and the moved page will no

longer appear for the current stage.
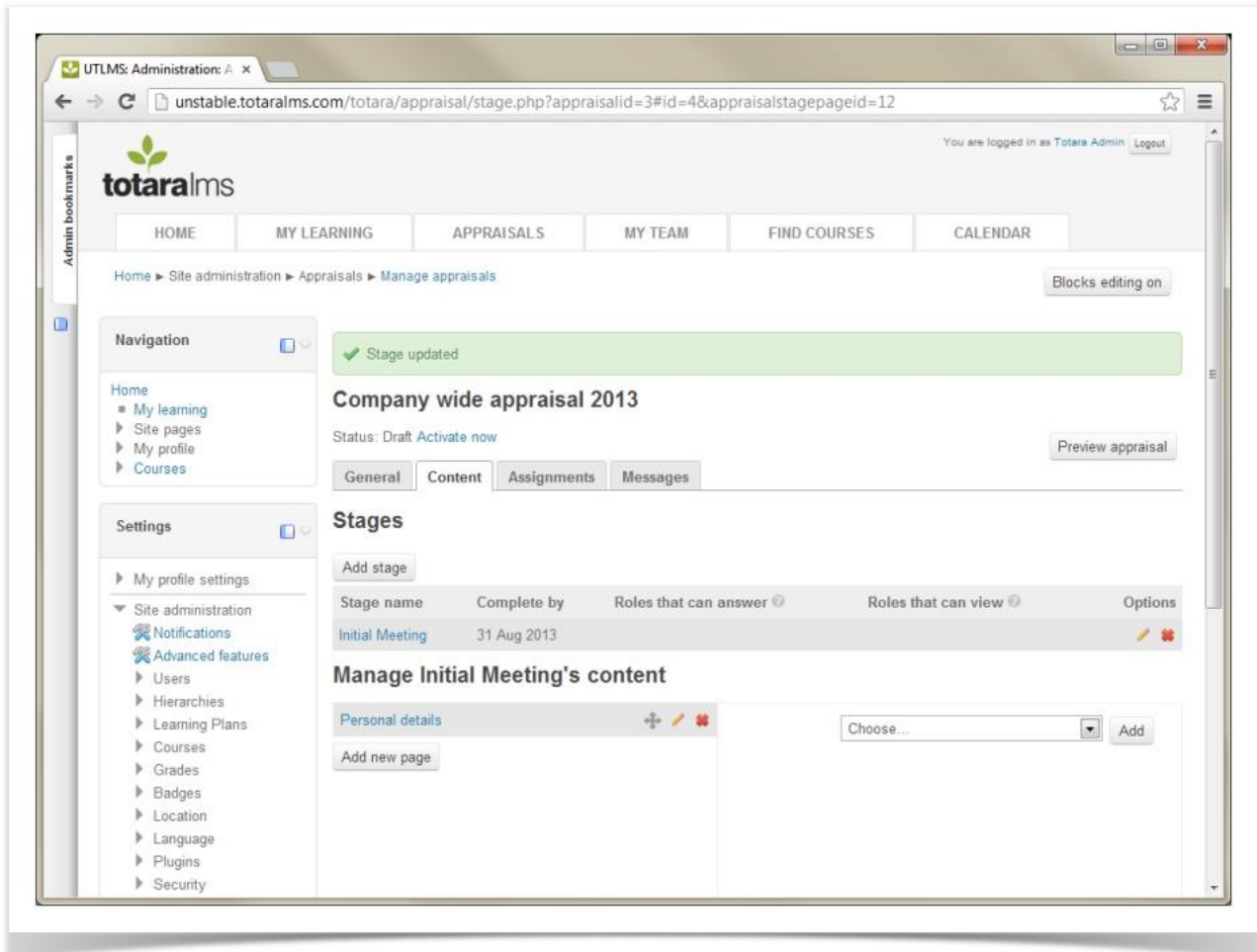
Add elements to an appraisal page

Once a page has been created, a dropdown will appear on the right-side of the page. This dropdown allows you to select elements to add to the page.

Element types include:

- **Question:** Build a custom question for the user to respond to. This could include multiple choice, rating scales, file uploads, or text entry areas.
- **Review question:** Review data from another area of Totara LMS as part of the appraisal. This includes goals and elements of the Learning Plan, such as courses, competencies, objectives and other evidence.
- **Non-question element:** Display additional information in the appraisal such as a fixed image, text, or information from the user's profile.

1. Choose an element from the drop down and then select the **Add** button.

A dialog will appear that allows you to set up the element. Part of setting up the element is deciding who will need to respond to the question and who can view the question and other users' responses. The **Permissions** section allows you to select which user roles will see this element, which user roles are required to response and which user roles can see other users' responses in the appraisal. It is

possible to have questions that are only visible to and answered by Managers, Appraisers, etc.

Keep in mind that when a question requires a response from a particular user role, a user must be assigned to that role in order to answer the question. When the appraisal is activated, the system will check to make sure that users are assigned to the roles that require a response. For example, if a learner's manager is required to respond to a question, Totara will check to make sure that every learner assigned the appraisal has a manager assigned on their user profile.
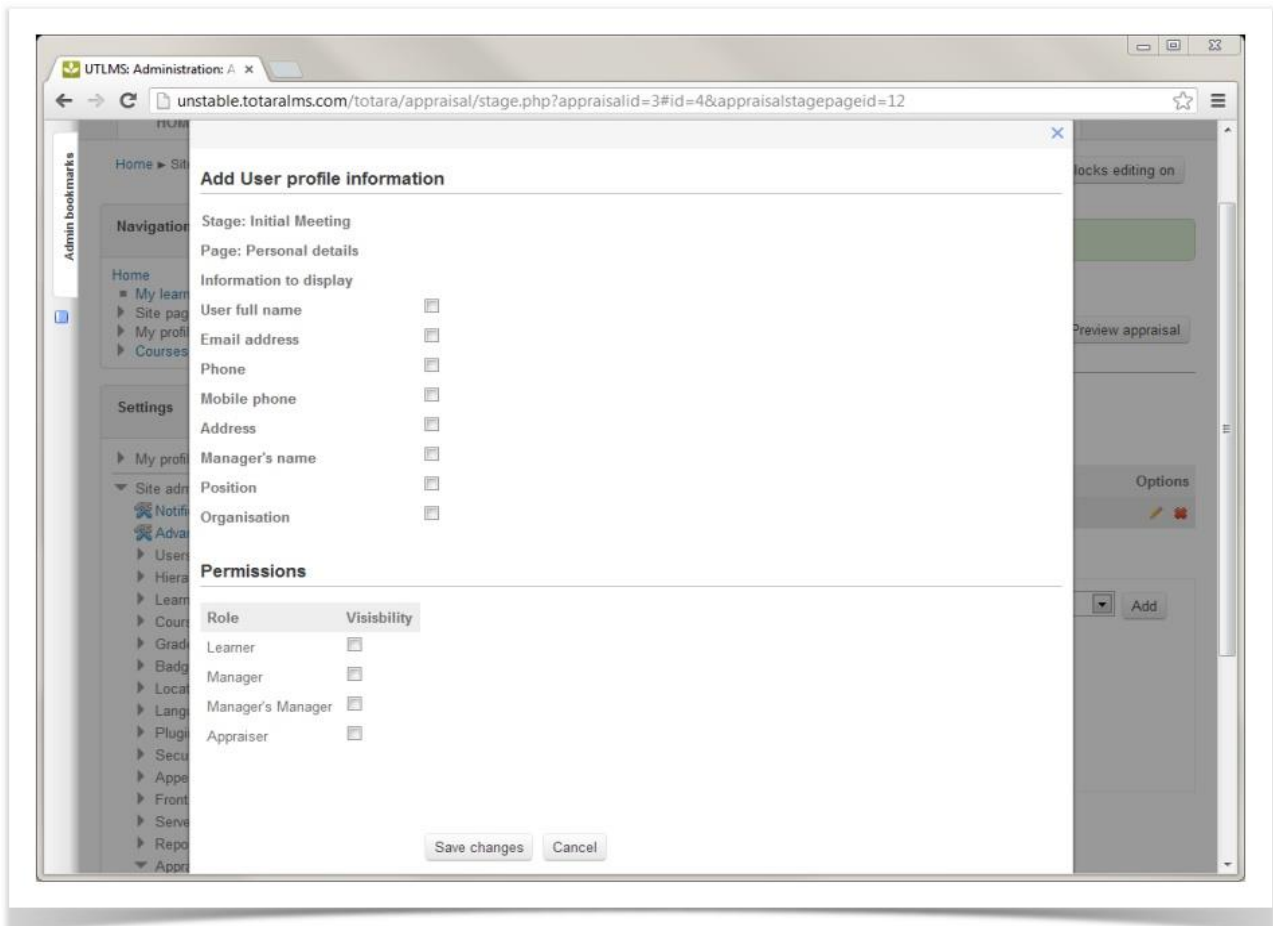
After at least one question has been added to the page, an additional checkbox will appear above **Permissions** that asks if the permissions on the new question should be the same as the preceding question. Placing a tick in the box will automatically mark the same permissions as are defined on the preceding question. Those choices can be overridden if needed.

2. Select the **Save changes** button in the dialog box. The new element will appear under the dropdown.

Repeat these steps to create additional stages, pages, and elements within the appraisal. Note that the order of the elements displayed will be the same when the page is viewed by users completing the appraisal.

Question

Date picker

Allow users to enter a date and or date/time.

- Question: Enter text for the question being posed for assessment.

- Date selection: Enter the *First year available* and *Last year available* to the user for selection. Check the **Include time as well as date** checkbox if the user needs to enter a time with the date.

- Permissions: Check the **Same as preceding question** option to carry over permissions from the last question. Check the checkbox next to the roles that need to **Answer** the question, are **Required** to answer the question and won't be able to save the form unless they fill in a response, and may **View other role's answers** to the question.

File upload

The file upload option allows users to upload files in response to the question. Any type of file may be uploaded. When another user reviews the appraisal, they will have access to download the file assuming that their role has been granted permission to view the response.

- Question: Enter text for the question being posed for assessment.

- Maximum number of files: Enter the maximum number of files that the user may be allowed to upload.

- Permissions: Check the **Same as preceding question** option to carry over permissions from the last question. Check the checkbox next to the roles that need to **Answer** the question, are **Required** to answer the question and won't be able to save the form unless they fill in a response, and may **View other role's answers** to the question.

Long text

Allow the user to enter a large amount of text and format it using the HTML editor. This could also include inserting links and images.

- Question: Enter text for the question being posed for assessment.

- Permissions: Check the **Same as preceding question** option to carry over permissions from the last question. Check the checkbox next to the roles that need to **Answer** the question, are **Required** to answer the question and won't be able to save the form unless they fill in a response, and may **View other role's answers** to the question.

Multiple choice (one answer)

Allow the user to choose one option from a list.

- Question: Enter text for the question being posed for assessment.

- Available choices: Enter one choice in each of the text boxes. Select the **Make selected by default** link next to an option if it should be the default value. To add more options, select the **Add another option** link.

  If this list of choices will be used in multiple questions, check the **Save these choices for other question as** checkbox and enter a name for the set of choices in the text box. When creating multiple choice questions in the future, you will have the option to select this set.

- Display settings: Choose whether the user will be presented with a series of radio buttons or a drop-down menu of choices to select their response.

- Permissions: Check the **Same as preceding question** option to carry over permissions from the last question. Check the checkbox next to the roles that need to **Answer** the question, are **Required** to answer the question and won't be able to save the form unless they fill in a response, and may **View other role's answers** to the question.

Multiple choice (several answers)

Allow the user to choose multiple options from a list.

- Question: Enter text for the question being posed for assessment.

- Available choices: Enter one choice in each of the text boxes. Select the **Make selected by default** link next to an option if there should be a default value. To add more options, select the **Add another option** link.

  If this list of choices will be used in multiple questions, check the **Save these choices for other question as** option and enter a name for the set of choices in the text box. When creating multiple choice questions in the future, you will have the option to select this set.

- Display settings: Choose whether the user will be presented with a series of checkboxes or a multi-select menu of choices to select their responses.

- Permissions: Check the **Same as preceding question** option to carry over permissions from the last question. Check the checkbox next to the roles that need to **Answer** the question, are **Required** to answer the question and won't be able to save the form unless they fill in a response, and may **View other role's answers** to the question.

Rating (custom scale)

Allow the user to rate an item using a description and associated score. For example, this could be a 1-5 scale rating an employee's level of competence in an area, where 1 is "Not Competent" and 5 is "Very Competent".

- Question: Enter text for the question being posed for assessment.

- Available choices: Enter one **Choice** in each of the text boxes. For each choice, enter a **Score** that will be used for aggregation and analysis. Select the **Make selected by default** link next to an option if there should be a default value. To add more options, select the **Add another option** link.

  If this list of choices will be used in multiple questions, check the **Save these choices for other question as** option and enter a name for the set of choices in the text box. When creating rating questions in the future, you will have the option to select this set.

- Display settings: Choose whether the user will be presented with a series of radio buttons or a drop-down menu of choices to select their response.

- Permissions: Check the **Same as preceding question** option to carry over permissions from the last question. Check the checkbox next to the roles that need to **Answer** the question, are **Required** to answer the question and won't be able to save the form unless they fill in a response, and may **View other role's answers** to the question.

Rating (numeric Scale)

Allow users to enter a numeric value as their response to the question.

- Question: Enter text for the question being posed for assessment.

- Answer range: Enter a **From** and **To** value for the numeric scale. Check the **Set default** checkbox and enter the value that the slider or text input field should have as a default.

- Display settings: Choose whether the user will be presented with a slider or a text input field to enter their response.

- Permissions: Check the **Same as preceding question** option to carry over permissions from the last question. Check the checkbox next to roles that need to **Answer** the question, are **Required** to answer the question and won't be able to save the form unless they fill in a response, and may **View other role's answers** to the question.

    ### Short text

    Allow the user to enter a single line of text. This might be used for short or simple answers to the question.

- Question: Enter text for the question being posed for assessment.

- Permissions: Check the **Same as preceding question** option to carry over permissions from the last question. Check in the checkbox next to roles that need to **Answer** the question, are **Required** to answer the question and won't be able to save the form unless they fill in a response, and may **View other role's answers** to the question.

Review questions

Allow data to be imported from learning plans, goals, or required learning for review in the appraisal. When users are working through the appraisal process, they will select the specific competencies, courses, etc. that they want to pull into the appraisal for review.

- Question: Enter text for the question being posed for assessment.

- Goal selection: Specifically available for the goals review question, this option allows you to choose how goals will be added to the appraisal. Options include allowing users to choose the goals, automatically adding all goals, or not allowing a particular type of goals to be reviewed. Separate options are available for company and personal goals.

    If the automatically adding of goals option is selected, then as long as the appraisal is active if any new goals are assigned to the learner then they will be pulled into the appraisal as well. If goals are removed from the learner, then the goals are left on the appraisal with the opportunity to remove them from the appraisal.

- Include rating: This option will be available for competencies and goal review questions. It allows users to modify the competency or goal status just as if you were changing the status in the learning plan or *My Goals* page. Only those roles with permissions to modify the status in the learning plan or *My Goals* page will be able to update the rating through the appraisal.

- Multiple fields: By default, when the multiple fields option is disabled, one text box per review item will be provided for the users to put their answers. When the multiple fields option is enabled, you can create several text boxes for each review item, each with its own title. Enter a title (such as a question relating to the review items) for each text box that you want to provide.

- Permissions: Check the **Same as preceding question** option to carry over permissions from the last question. Check the checkbox next to roles that need to **Answer** the question, are **Required** to

answer the question and won't be able to save the form unless they fill in a response, and may **View other role's answers** to the question.

Non-question element

Aggregate rating questions

If on an earlier page the appraisal uses either numerical or custom rating question types, you can use this data in aggregate rating questions. The score you've assigned to each choice will be aggregated and the option to **Display average** or **Display median** will be available.

You can also choose whether unanswered and zero scores are included in the aggregation.

By default, only answered questions resulting in a non-zero score are included in the average and/or median calculations.
The provided checkboxes can be used to also include unanswered and/or zero scored questions in the calculation.

When you check the **Include scores for unanswered questions** option, unanswered questions will be given the default score specified by an administrator. If no default score exists then they will be given the minimum value (numeric scales) or 0 (custom scales).

When you check the **Include zero scores** option, questions with a zero score will be used in the calculation.

Fixed image

Add a fixed image to an appraisal page.

- Image: Browse for, or drag and drop an image.

- Description: Enter a description for the image being uploaded.

- Permissions: Check the checkbox next to roles that should have **Visibility**. Note that at least one role must be selected.

Fixed text

Add fixed text to an appraisal page.

- Fixed text: Enter the fixed text you wish to be displayed.

- Permissions: Check the checkbox next to roles that should have **Visibility**. Note that at least one role must be selected.

Redisplay previous question

To pull an existing question from another page or stage, choose the **Redisplay previous question** option. Select the question that should be repeated in the appraisal. A question from the current page will not be available for redisplay. If the stage that the question comes from is locked, then the redisplay question and responses will be read-only. If the stage is still active, then the redisplayed question will be writeable as well. Note that both questions are displaying the same answer, so changing the response on the redisplayed question will change the response on the original question as well.

User profile information

It is possible to display user profile information on an appraisal page. This might be used to confirm that the learner and manager details are correct.

- Information to display: Check the checkbox next to the user profile fields you wish to display.

- Permissions: Check the checkbox next to roles that should have **Visibility**. Note that at least one role must be selected.

Each element on the page is displayed with the question text and type of element. Each element can be updated by selecting the **Settings** (pencil icon) button, duplicated by selecting the **Copy** button, or deleted by selecting the **Delete** button.

Elements can be moved by clicking on the multi-directional arrow icon then dragging and dropping the element in a new location. Elements can be moved to a new page by dragging the element over the page title and dropping it when the area around the page title is highlighted. If the move was successful, the page will automatically refresh and the element will no longer appear on the original page. Elements can also be moved to a new stage by dragging the element over the stage title and dropping it when the area around the stage title is highlighted. The element will be added as the first element on the first page of the destination stage.