

Assigning appraisals



Please note this is a legacy feature. To read about the improved performance management features new to Totara 13 please see the [Performance page](#).

After an appraisal has been created, Learners can be assigned to it on the *Assignments* tab. User assignments can occur any time during the appraisal creation. The appraisal won't be released to users until the **Activate now** link is selected. In the meantime, the appraisal status is set to **Draft**.

(This video above is taken from the [Appraisals](#) course in the Totara Academy).

The screenshot shows the Totara Learn interface. A modal dialog titled "Assign Learner Group To Appraisal" is open, displaying a list of "Items to add" with the following options:

- Accounting (AUD0003)
- All users (AUD0001)
- New hires (AUD0002)

Below the list are "Save" and "Cancel" buttons. The background interface shows the "Manage appraisals" page with a table of learners and a search bar.

Learners	Actions
9	✖

Search:

An appraisal can be assigned to users based on their audience, organisation, or position. Select the type of group to assign in the **Assign user group** drop down.

Select the **Save** button.

totara learn Home Dashboard Record of Learning Performance Team Find Learning

Home / Site administration / Appraisals / Manage appraisals / Health and safety appraisal

Blocks editing on Remove from admin menu

Health and safety appraisal

Status: Draft Activate now Preview appraisal

GENERAL CONTENT **ASSIGNMENTS** MESSAGES

Assigned Groups

Assign User Group

Assignment Type	Assigned Group	Include Child Groups?	Learners	Actions
Audience	All learners	No	9	

Assigned Learners

Show 10 entries

Search:

Learner	Assigned Via
Christophe Mercier	Audience All learners
Damian Maciejewski	Audience All learners
Jonathan Barigye	Audience All learners
Leo Scott	Audience All learners
Luna Vermeulen	Audience All learners
Monica Butti	Audience All learners
Nadine Wyss	Audience All learners
Richard Hamel	Audience All learners
Vincent Bilodeau	Audience All learners

Showing 1 to 9 of 9 entries First Previous 1 Next Last

The assignment type and all assigned Learners will now appear on the *Assignments* tab. One appraisal can be assigned to multiple groups.

A site administrator or a user with the 'totara/appraisal:unlockstages' capability set to **Allow**, can reopen or unlock a completed stage for a specific appraisal role (e.g. Learner, Manager, Appraiser etc) or all roles, within a specific user's appraisal form, via the appraisal management area under the [Assignments](#) tab.

For more information please see [Managing appraisals](#).

Assigned groups

This section displays:

- **Assignment Type:** The type of group that has been assigned (Audience, Position or Organisation).
- **Assigned Group:** The name of the audience, position, or organisation that was assigned.
- **Include Child Groups:** Set to **Yes**, the child organisations or positions below the assigned group will also be included in the appraisal. Set to **No**, only the organisation or position listed in the **Assigned Group** field will be added to the appraisal. This field cannot be updated; if the value needs to be changed, delete the current assignment group using the **Delete** icon under the **Options** column and recreate it with the correct value.
- **Learners:** The number of Learners that currently fall into the group based on the previous selections.

The **Learners** column shows the current number of users in the specific user groups. For dynamic groups this may differ from the number that were in the group when the group was originally assigned or have been assigned at any point while the appraisal is/was active.

- **Actions:** To remove an assignment, select the **Delete** button in the **Actions** column next to the group that needs to be removed.

Assigned Learners

This section displays:

- **Learner:** Lists the Learners that have been assigned as a part of one of the groups and the name of each learner links to their user profile.
- **Assigned Via:** The group(s) that the Learner is assigned via will be displayed. A Learner may have been assigned to an appraisal through multiple groups.
- **Current stage:** Displays the name of the appraisal stage the user is will next complete.
- **Edit current stage:** Site administrators and users with the permission 'totara/appraisal:unlockstages' can change or unlock a user's stage.

The **Show Entries** drop down allows you to select the number of rows of Learners that will be displayed per page. Use the buttons in the lower-right corner to jump to additional pages.

Use the **Search** box to enter a learner's name and hit the **Enter** key to search for Learners.



The learners that are listed differs depending on the status of the appraisal:

- Draft - the table lists the users in the assigned user group(s).
- Active - the table lists the users currently assigned to the appraisal.
- Closed - the table lists the users who completed the appraisal. This does not include users who completed the assignment but were later removed from an assigned user group.

Totara Academy



The Totara Academy has a whole course dedicated to using [Appraisals](#) in Totara. Here you can learn more on how to use the tool, see best practice, and give it a go yourself.