Accessing performance activities

Viewing performance activities

Users can view the performance activities assigned to them by navigating to *Develop* > *Activities* from the top navigation bar. There are two tabs available here: **Your activities** and **Activities about others**.

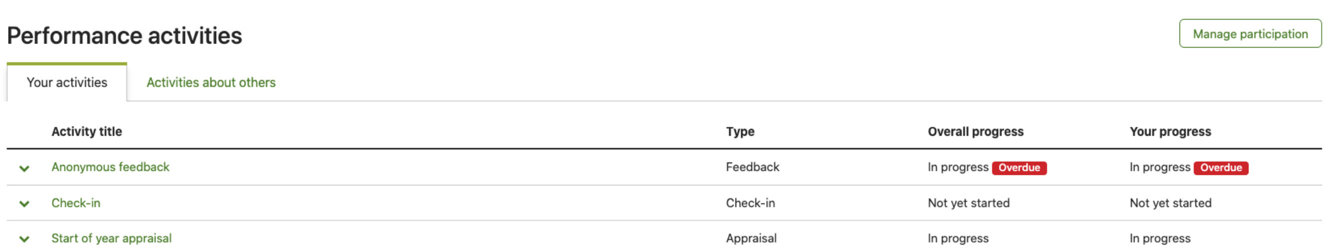
Users can view any activities in which they are the **Subject** in the **Your activities** tab.

Users may also need to complete activities as an **Appraiser** or **Manager**. These activities can be found in the **Activities about others** tab.

Activities about me

The user can see all of the performance activities about them (i.e. they are the **Subject**) in this table.

Column	Description	Notes
Activity title	The name given to the activity. Click the title to view the activity.	-
Type	Displays the type of activity from the following options: • Feedback • Check-in • Appraisal	-
Your progress	This shows the user's progress through the activity: • Not yet started • In progress • Complete • Not submitted • n/a (view only)	If a due date has been set for the activity and this date has passed without you completing the activity then there will be an **Overdue** warning alongside your progress.
Overall activity progress	This column indicates the overall progress of the activity: • Not yet started • In progress • Complete	If another participant has started the activity the status will display as **In progress**, even if the viewer hasn't started the activity. If a due date has been set for the activity and this date has passed without the activity being completed then there will be an **Overdue** warning alongside your progress.



Activities about others

Users may also need to complete performance activities in a variety of different relationships, providing feedback for their team members and colleagues. Relationships that can provide feedback on colleagues include:

- Appraiser
- Manager
- Manager's manager
- Peer
- Mentor
- Reviewer

Any activities requiring the user to participate in either of these roles are displayed in a table here.

Column	Description	Notes
Activity title	The name given to the activity. Click the title to view the activity.	-
Type	Displays the type of activity from the following options: • Feedback • Check-in • Appraisal	-
User	The name of the **Subject** (i.e. the person being appraised) of the activity.	-
Relationship to user	Displays the viewer's relationship to the activity's **Subject**: • Manager • Manager's manager • Appraiser	-
Your progress	This shows the viewer's progress through the activity: • Not yet started • In progress • Complete • Not submitted • n/a (view only)	-
Overall activity progress	This column indicates the overall progress of the activity: • Not yet started • In progress • Complete	If another participant has started the activity the status will display as **In progress**, even if the viewer hasn't started the activity.

Filtering activities

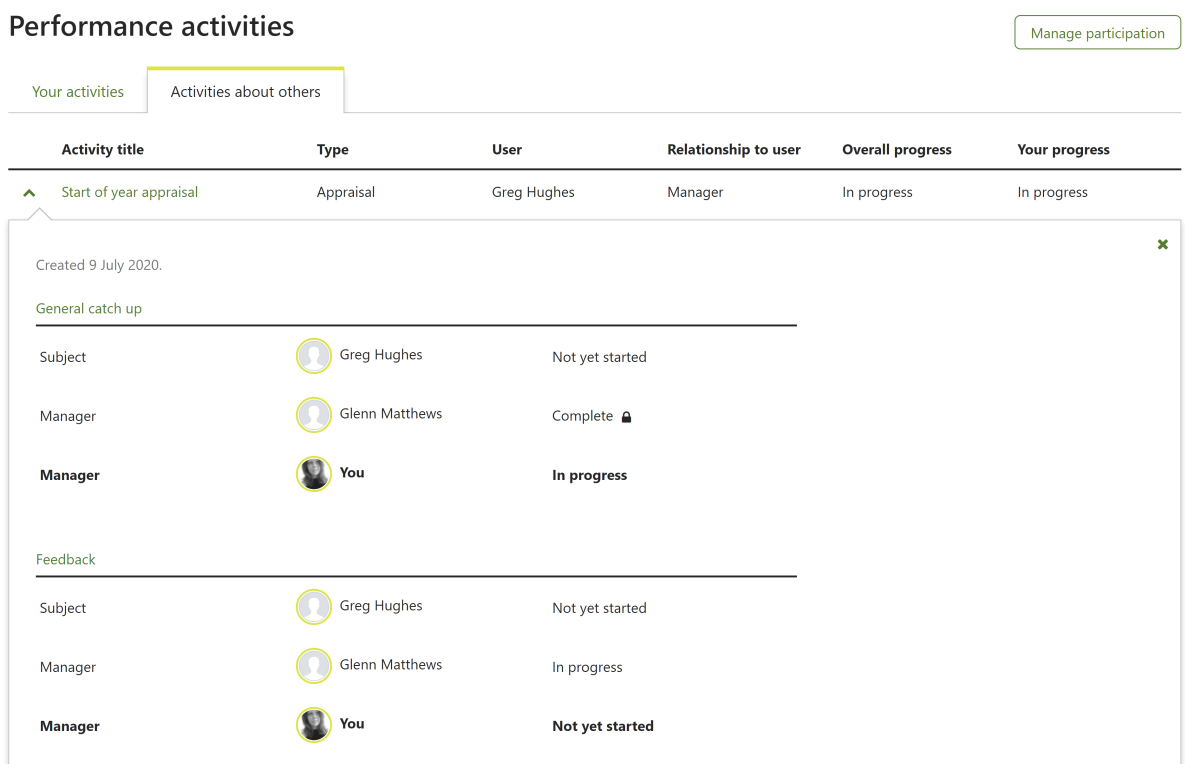
On both the **Your activities** and **Activities about others** tabs you can filter the activity lists to find relevant activities. You can filter by the following options:

Filter	Description	Notes
Type	Select an option to only show a specific activity type (or all types): • All • Feedback • Check-in • Appraisal	-
Your progress	• Not started • In progress • Complete • Not submitted • Not applicable	-
Overdue activities only	Toggle this setting on to only show activities which have not been submitted and have passed their due date.	-

Selecting an activity

Clicking the activity title will take you to the start of the activity. You can also click the arrow icon ( ) to show the activity details.

When expanded you can see the date the subject instance was created, each of the sections (if enabled), the participants involved and the status of each participant instance (e.g. **In progress** or **Complete**). You can close the panel by clicking the arrow icon again or by clicking the cross ( ) in the top-right corner.



If the activity has multiple sections you can also jump straight to a specific section rather than starting from the beginning of the activity. To jump to a section simply click the section name in the expanded activity details panel.

> ⚠ If there is a section you are not participant in then you will not be able to jump to it using the section name link. You will however still see the section in the list where you can view the section details.

When answering questions you'll be able to see details about who your responses are visible to, and when they will become visible. This information will appears under the title of the section (for multi-section activities) and under the title of the activity (for single section activities).

Completing performance activities

If you have been assigned any performance activities then you will need to complete these. Some activities you will be assigned as the subject and these will be about you, in other activities you will be identified as a participant to contribute responses about other people.

Completing an activity about you

If you have been assigned an activity where you are the subject then you can complete your parts by following these steps:

1. From the top menu bar go to *Develop* > *Activities*.
2. Ensure the **Your activities** tab is selected (this should appear first by default).
3. Click the title of the performance activity you wish to complete.
4. Work through the questions, some questions may be optional but you will need to ensure you answer anything marked with an asterisk (*****) as these are mandatory.
5. If it is available the **Show others' responses** toggle in the top-right corner will allow you to see how other participants have answered each question.
6. If you are not ready to submit and need to come back to finish questions another time then click the **Save as draft** button.
7. When you finish a page of questions be sure to click the **Submit** button before proceeding to save and submit your answers.

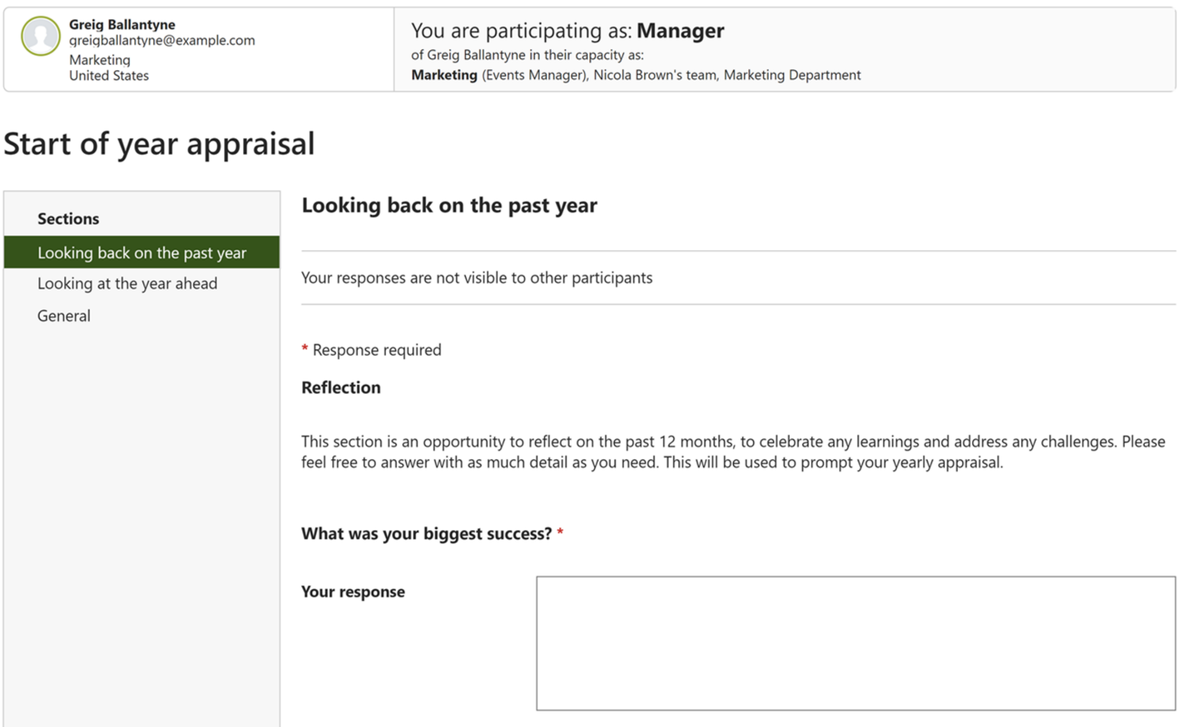
> ⚠ When you **Save as draft** no one else will be able to see your responses.
>
> Once you click the **Submit** button your responses will be visible to other users who have permission to view them (after any time restrictions have also passed).

Completing an activity about someone else

If you have been assigned an activity where you are a participant then you will be required to submit responses about someone else (the subject). You can do this by following these steps:

1. From the top menu bar go to *Develop* > *Activities*.
2. Go to the **Activities about others** tab.
3. Click the title of the performance activity you wish to complete.
4. Work through the questions, some questions may be optional but you will need to ensure you answer anything marked with an asterisk (*****) as these are mandatory.
5. If it is available the **Show others' responses** toggle in the top-right corner will allow you to see how other participants (including the subject) have answered each question.
6. If you are not ready to submit and need to come back to finish questions another time then click the **Save as draft** button.
7. When you finish a page of questions be sure to click the **Submit** button before proceeding to save your answers.

> ⚠ Once submitted, your responses will be visible to other users who have permission to view them.
>
> You will not be able to update your responses after submission.



Viewing responses

After completing a performance activity you may wish to view the responses. When you do this will depend on how the activity has been set up and the viewing context.

If the performance activity has been set up as anonymous then you will not be able to see any responses until after the activity has closed, this is to protect anonymity.

If anonymity is not enabled then when you can see your responses or the responses of others will depend on how the **Visibility condition** setting was set when the performance activity was created. It will also depend if you were granted permission to view other people's responses in the **Responding participants** setting.

> ⚠ If you are a **View-only participant** then you will also be affected by the **Visibility condition** setting when the performance activity was created.

You see see more on the Creating performance activities page.

Totara Academy

The Totara Academy has a whole course dedicated to Running successful check-ins in Totara. Here you can learn more on how to set up and use performance activities for check-ins, see best practice, and give it a go yourself.