Managing performance activities

You can review the performance activities on your site by navigating to *Quick-access menu > Activity management*. On the **Manage performance activities** page you can see a list of all of the available performance activities.

In the table you can see each activity's **Name**, **Type**, and **Status**. There are three options for **Type**: **Appraisal**, **Check-in** and **Feedback**. These types do not limit you when creating and configuring the activities, but help you to understand the purpose of each activity at a glance. Activities can have two statuses: **Active** and **Draft**. Active activities will create instances of the activity for all assigned users who meet the criteria you set up. Instances are copies of the activity for each user to complete. You can determine how instances are created when creating a performance activity.

Click on the name of an activity to configure it and add content. In the actions column you can click the ellipsis icon ( ) to complete additional actions (such as cloning, deleting or activating an activity), or click the participation reporting button ( ) to see the participation report.

Creating a performance activity

You can create new performance activities by clicking **Add activity**. Find out more about this process and the various settings on the Creating performance activities page.

Activating performance activities

When you first create a performance activity its status will be set to **Draft**, ensuring that users do not see incomplete activities.

After configuring the required settings and assigning the activity to users you will need to activate the activity. There are two ways to activate an activity:

- From the **Activity management** page: To activate the activity click the ellipsis icon ( ), then select **Activate** from the dropdown list. Now on the **Manage performance activities** page the status of the activity will be displayed as **Active**.
- From within an activity: When editing a draft activity you will see an action banner above the tabs which include an **Activate** button, click the button to activate the activity.

Note that the although the **Activate** option may be available, until you have added at least one question element and responding participant relationship per section and assigned users to the activity you will not be able to activate it, and will instead receive a warning saying it cannot be activated.

Cloning a performance activity

When you want to create a new activity it can be quicker to use an existing activity as a starting point, then edit the settings or content before assigning it to users. To duplicate a performance activity click the ellipsis icon ( ), then select **Clone** from the dropdown list.

Cloning a performance activity will duplicate everything in the activity (content, settings, and the structure of the activity) but users' participation in it is not cloned.

The new cloned activity will automatically have the **Draft** status.

When you clone a performance activity Totara creates a backup of the activity and restores it to create a new copy.

Deleting a performance activity

To delete a performance activity click the ellipsis icon ( ), then select **Delete** from the dropdown list.

Deleting a performance activity will also remove all related subject and participant instances, as well as all users' responses.

There may be times when participants in performance activities want to remove their responses. It is also important to allow users to remove any information that could be used to identify them. As a Site Administrator you can configure export and purge types on your site to allow users to see and remove the data contained in their performance activities.

Manually managing the availability of an activity

Both Site Administrators and Staff Managers can manually manage the availability of a performance activity subject instance, for example closing or re-opening an appraisal activity for a particular employee.

When manually managing availability in either role it is important to know that closing an instance will prevent any further submissions, regardless of the affected user's progress. If the answers have not been submitted then the status will be changed to **Not submitted**.

Opening an instance will change it to Not started if there are no responses saved within it or return it to the In progress status if there were responses, even if it was previously completed. Any submitted responses by the participant will be saved as a new draft. Responses will be unavailable for viewing in this state (and will become visible again when the conditions for visibility are fulfilled).

As a Site Administrator

To manually manage the availability of a performance activity as a Site Administrator you must first ensure you are logged in as a Site Administrator, then follow these steps:

1. Navigate to *Quick-access menu > Activity management.*
2. Alongside the activity for which you wish to open or close an instance for click the **Manage participation** icon ().
3. View the **Subject instances**, **Participant instances** or **Participant sections** tabs to navigate to the instance or section of the performance activity you wish to open or close.
4. In the report table, alongside the instance you wish to manage you will see a padlock icon in the **Action** column:
    - **Close an instance:** If the activity is open there will be a closed padlock icon () to close it
    - **Open an instance:** If the activity is closed there will be an open padlock icon ( ) to open it
5. Click the padlock icon and then read the warning message to ensure you are aware of the effects the action will have.
6. Then either click the **Close** button (if you are closing an instance) or click the **Reopen** button if you are opening an instance.
7. You can also click **Cancel** if you no longer wish to continue with the action.

Alongside the instances on the **Subject instance** table you will also see an add participant icon ( ) that allows you to add a participant in one of the available relationships once you click it.

As a Manager

As a Staff Manager you can manually manage the availability of performance activities for members of your team. To do this follow these steps:

1. Navigate to *Develop* > *Activities* from the top navigation bar.
2. Above the list of activities, on the right-hand side, click the **Manage participation** button.
3. From the dropdown menu select the performance activity you'd like to manually manage availability for.
4. Click the **Continue** button.
5. View the **Subject instances**, **Participant instances** or **Participant sections** tabs to navigate to the instance or section of the performance activity you wish to open or close.
6. In the report table, alongside the instance you wish to manage you will see a padlock icon in the **Action** column:
    - **Close an instance:** If the activity is open there will be a closed padlock icon () to close it
    - **Open an instance:** If the activity is closed there will be an open padlock icon ( ) to open it
7. Click the padlock icon and then read the warning message to ensure you are aware of the effects the action will have.
8. Then either click the **Close** button (if you are closing an instance) or click the **Reopen** button if you are opening an instance.
9. You can also click **Cancel** if you no longer wish to continue with the action.

Alongside the instances on the **Subject instance** table you will also see an add participant icon ( ) that allows you to add a participant in one of the available relationships once you click it.