

Dynamic 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](#).

Normally when activating an appraisal, [checks are made](#) to ensure the appraisal can be activated and activation is prevented if the appraisal is missing any assignment groups, answerable questions, or if a valid end date is not provided for appraisal stages.

Usually once an appraisal is active no further changes to assignments can be made, however with dynamic appraisals enabled, appraisals can be activated with no users in an assignment group and assignment changes can be made whilst an appraisal is active.

Enable dynamic appraisals

To enable dynamic appraisals there are two settings that can be activated under *Quick-access menu > Configure features > Perform settings*.

Setting	Description	Notes
Dynamic appraisals	Enabling this setting by ticking the box alongside it turns on the dynamic appraisals feature.	Dynamic appraisals are enabled by default for new site installations and disabled by default on upgraded sites. If dynamic appraisals are enabled on upgraded sites, assignment or role related changes will also apply to existing appraisals that are active.
Dynamic appraisals automatic progression	<p>This setting determines what happens when a role does not have a user assigned to it.</p> <ul style="list-style-type: none">• Disabled: All roles must be filled (i.e. they have been selected as 'can answer' and/or 'required' for the stage)• Enabled (or non-dynamic): Unfilled roles (roles which have not been selected as 'can answer' and/or 'required') will be ignored <p>This means that when enabled, this setting ensures appraisals are allowed to automatically progress to the next stage, even if one or more roles are not filled (assuming at least one role is filled and all filled required roles have completed the stage).</p> <p>When dynamic appraisals is enabled and this setting is switched off, all required roles need to complete the stage. Empty roles will need to have users assigned before the stage can be progressed.</p>	This setting is enabled by default.

Active appraisal assignments

Group assignment changes

Individual users who become part of an existing assigned group, are assigned to, or removed from an appraisal as appropriate. Warnings are displayed on the *Assignments* tab and user appraisals, if users are missing any required roles.

When a user is added to a group that is assigned to an appraisal, a new appraisal is automatically created for the user. The system will also check if the user has any existing data for the appraisal. If there is, it will reopen the closed appraisal for the user. If not, the user will be assigned the appraisal. Any reminder messages for overdue stages are prevented from being sent to the user.

When a user is no longer part of a group assigned to an appraisal, their appraisal will be closed and the status will display as "Closed". Reminders are also prevented from being sent to the user.

Role assignment changes

A user's role (manager, manager's manager, or appraiser) can be changed or deleted mid-appraisal.

If a user's manager, manager's manager, or appraiser changes after an appraisal has been activated, their appraisal will be reassigned to the new user(s) and any answers completed by the old assignee(s) will belong to the new assignee(s).



An appraisal will still work, however the user may not be able to progress until the missing role(s) are updated.

Changes to group and role assignments are made when the *Update learner assignments to appraisals* (\totara_appraisal\task\update_learner_assignments_task) scheduled task is run, which - by default - is hourly. Group assignment changes may also be updated manually before the scheduled task has run by selecting the **Update now** button on the *Assignments* tab.

Annual Appraisal (Health & Safety Representative)

Status: Active [Close](#)

Some assigned users are missing important role assignments. [View full list of missing roles](#)

[Preview appraisal](#)

GENERAL

CONTENT

ASSIGNMENTS

MESSAGES

Assigned Groups

Assign User Group ▾

Assignment Type	Assigned Group	Include Child Groups?	Learners	Actions
Organisation	Head Office	Yes	9	

Assigned Learners

Changes within the assigned groups have occurred but are not yet live. Appraisal assignments will be updated on the next cron run

[Update Now](#)

Show

10 ▾

entries

Search:

Closed appraisals

Closing an appraisal will prevent any further assignment changes being made. A closed appraisal is no longer editable. Therefore a dynamic appraisal is not closed automatically when all users have completed it, because new users could be added, or removed at any time if the assigned group membership changes. It is up to the site administrator(s) to close an appraisal when it is no longer required (although there is no problem with leaving it open).

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.