Creating performance activities

When you are getting started with Totara Perform, you will need to set up the performance activities you want to assign to users.

Creating a performance activity

To create a new performance activity you need to follow these steps:

1. Navigate to *Quick-access menu > Activity management*.
2. Click **Add activity**.
3. Enter the **Activity title** and a brief **Description**.
4. Select an **Activity type** from the dropdown list:
    - Appraisal
    - Check-in
    - Feedback
5. Click **Get started**.
6. You can edit the **Activity title**, **Description** and **Activity type** on the **General** tab. If you do so, remember to click **Save changes**.
7. You can optionally turn **Anonymise responses** on or set the **Selection of participants** (see **General** tab settings below for more).
8. Configure the settings on the **Content** tab.
9. Configure the **Assignments** and **Notifications** tabs.

Many of these settings can only be edited while the activity is in the **Draft** stage. Once the activity is **Active** you can still change the **Assignments** and **Notifications** settings, but you will not be able to change the **Activity type** or **Anonymise responses** settings. Also you will not be able to change any activity content.

General tab settings

Setting	Description	Notes
Activity title	The title of the performance activity, this should be brief but descriptive (and ideally unique to avoid confusion).	Mandatory field.
Description	A short description of the performance activity. This can be helpful to allow others understand the purpose of the activity.	This is only visible to Site Administrators.
Activity type	Select the type of activity, choose from: • Appraisal • Check-in • Feedback	-
Anonymise responses	If enabled responses will be anonymised, meaning users will not be able to see who has provided responses as part of the activity.	-
Visibility condition	This setting determines when users whose relationship allows them to view others' responses will have access to those responses. Responses are never visible to others before they've been submitted Choose from the following options: • None (submitted responses immediately visible to viewers) • Response submission is closed for the participant who is viewing • Response submission is closed for all participants	When **Anonymise responses** is enabled, closure of all response submissions is enforced as the condition for response visibility, to ensure anonymity.
Selection of participants	Decide which participants will be able to manually choose the participants to fill certain relationships. This allows the relationships to be controlled by the desired user to best suit each case. For example you might allow the **Subject** to select the participants for the **Peer** relationship. This would mean the subject of an appraisal is able to select which peers they wish to review them.	Once activated it is not possible to change the users selected. Subject and participant instance will be generated.

Content tab settings

Setting	Description	Notes

Automatic closure	Enable this setting to automatically close sections and instances once they have been submitted. Closed sections can no longer be edited, and they are marked with a padlock icon.	If this setting is not enabled then each section will be marked as complete but will not be closed, meaning the participants can return and edit their answers at any point. You may also want to see manually managing the availability of an activity for more information on manually opening or closing a performance activity.
Multiple sections enabled	Enable this setting to divide the activity into multiple sections. Each section is presented as its own page with a unique URL. For each section you need to add a name and the responding participants (you can also optionally add view-only participants). Then add content by clicking **Edit content elements**. This setting gives you the flexibility to have different participants complete each section. You can add a section above or below existing sections, but note that you cannot change the order of sections.	If you have multiple sections set up and then disable this setting, all content will be merged into the first section. Additionally any section-specific participant settings will be removed. Each section must include at least one question.
Responding participants	Click the **+** button to decide which participants will need to complete the activity. You can choose from: • Subject • Manager • Manager's manager • Appraiser • Peer • Mentor • Reviewer • External respondent Select all that apply, then click **Done**.	At least one responding relationship must be added per section. For each participant you can remove the participant by clicking the remove icon ( ). You can also allow users to view other participants' answers by ticking the **Can view others' responses** checkbox. The subject needs to be selected here in order for the activity to appear in the user's **Your activities** page.
View-only participants	Click the **+** button to decide which participants will only be able to view the activity. You can choose from: • Subject • Manager • Manager's manager • Appraiser • Peer • Mentor • Reviewer • External respondent Select all that apply, then click **Done**.	For each participant you can remove the participant by clicking the remove icon ( ). Only relationships which have not been selected as **Responding participants** can be added as view-only.

Adding content to a performance activity

When you are ready you can start adding the required content.

1. Click **Edit content elements**.
2. Click **Add element**.
3. Select an option from the dropdown list. You can find out more about the available question types in the table below.
4. Complete the required fields for the chosen question type.
5. Optionally enter a **Reporting ID** if you want questions to be related and marked together (see more in the Related questions section of this page).
6. Click **Done**.
7. Repeat steps 2-4 to add more questions.

Once you have added all the questions you require you can navigate back to the activity page using the breadcrumb at the top of the page.

If a question is marked as required then it needs to be completed to submit the section in which it sits. If a question is not mandatory then the section can be submitted without answering the question.

Note that participants will not be warned if they have not completed any optional questions when submitting a section.

Once you have added more than one question you can change the order of questions by dragging and dropping them. Hover your mouse over a question, and when the drag-and-drop icon ( ) appears in the top-left corner you can click and drag the question to its new position within the section.

Moving content between sections

If you have set up multiple sections in a performance activity, you can move content and questions between sections by following these steps:

1. While editing the content of an activity select **Edit content elements** for the section containing the content you want to move.
2. On the content you want to move select the ellipsis icon ( ), then **Move to another section**.

3. A pop-up window will indicate which section you are moving the content from. Select the section you want to move the content to using the **Move to** dropdown list.
4. Click **Move** and the content will immediately move to the new section.

Note that you can't move content and questions between sections once the activity is active.

Content and question types

Content /question type	Description	Notes
Date picker	This question type allows you to enter **Question text** to which a date answer can be provided. Respondents can answer by selecting a date from the date picker.	-
Long text	For long text questions you can enter **Question text**, and participants can type a long text answer in response. You can make this question mandatory by checking the **Response required** box.	-
Multiple choice: Single-select	This question type allows you to present a question with multiple **Options** (presented as radio buttons), from which participants can select a single option. Enter the question in the **Question text** field, then enter the answers. Add more options by clicking the add icon ( ), or remove options by clicking the remove icon ( ). You can make this question mandatory by checking the **Response required** box.	This question type requires a minimum of two answers.
Multiple choice: Multi-select	This question type allows you to present a question with multiple options (presented as checkboxes), from which participants can select one or more options. Enter the question in the **Question text** field, then enter the options. Add more options by clicking the add icon ( ), or remove options by clicking the remove icon ( ). You can make this question mandatory by checking the **Response required** box.	-
Numeric rating	This question type allows you to present a sliding numeric rating scale. You can set the number values at either end of the scale and select the default value.	-
Custom rating	This question type allows you to present a rating scale as a series of radio buttons that the respondent can select from. You can enter the text to be displayed for each point on the scale and assign it a numeric value.	For example you might have a rating scale as follows: • Extremely poor (-2) • Poor (-1) • Average (0) • Good (1) • Very good (2)
Short text	For short text questions you can enter **Question text**, and participants can type a one-line answer in response. You can make this question mandatory by checking the **Response required** box.	-
Static content	This content type allows you to add text to the activity with no interactive elements. You can add a **Title** (optional), then a larger amount of text in the **Content** field.	You can use **Static content** elements to provide additional context and help participants to understand different parts of the activity. For example, you might want to explain the purpose of each section.

Note that the **Long text** and **Static content** types both use the Weka editor, although social functions (e.g. hashtags or user mentions) are not enabled in performance activity content.

Related questions

When adding a question to a performance activity you can choose to add an **Reporting ID**. You can give questions the same **Reporting ID** to create a relationship between them, allowing you to report on the related questions as though they were a single question.

You can create relationships between as many different questions as required.

For example, you might have two multiple choice questions about the subject's proficiency with different software. You could give these a shared **Reporting ID** such as 'software-skills', then the two questions would be considered together for reporting purposes.

It is strongly recommended to keep a record of which **Reporting IDs** you have used and where they are used.

Assigning a performance activity

After creating an activity and adding your content, you are ready to assign the performance activity to users. You can do this on the **Assignments** tab.

A user can only be assigned once, i.e. if they appear in multiple assigned audiences, they are still only assigned to a performance activity once.

Assign to an audience

1. On the **Assignments** tab, click **Add group**.
2. Select **Audience** from the dropdown list. Note that you can assign an activity to either set or dynamic audiences.
3. Tick the checkboxes for each audience you would like to assign the activity to. You can select any number of audiences.
4. Click **Add**.
5. The selected audiences will now be displayed on the **Assignments** tab.

You can edit your audiences after assigning them to a performance activity. If an audience is removed then any subject and participant instances that have already been created will be unaffected. If a user leaves an audience then they will still have access to any existing instances, but no new instances will be created.

On sites with multitenancy enabled, you will not be able see tenant audiences when assigning performance activities. Instead, you can create a dynamic audience at the system level using the **Tenant membership** rule to add users from a single tenant. These audiences will be available when assigning performance activities from the **Assignments** tab.

Additionally, if you create performance activities as a tenant member then they will only be available to other members and participants of your tenant.

Assign to a position or organisation

Another way to assign performance activities is based on the positions and organisations you have set up.

1. On the **Assignments** tab, click **Add group**.
2. Select **Position** or **Organisation** from the dropdown list.
3. Tick the checkboxes for each position or organisation you would like to assign the activity to. You can select any number of positions or organisations.
4. Click **Add**.
5. Your selections will now be displayed on the **Assignments** tab.

You can freely add or remove audiences once the activity is **Active** (i.e. it has been activated).

You can edit your positions and organisations after assigning them to a performance activity. If a position or organisation is removed then any subject and participant instances have been created will be unaffected. If a user is removed from the position or organisation with an assigned performance activity then no new instances will be created.

Activity instance creation settings

The activities you create essentially act as templates, from which **instances** will be created for assigned users. There are two types of instances that are created: **subject instances** and **participant instances**.

Subject instances refers to the parent instance created for a user assigned to a performance activity to which a number of participant instances are then attached.

Participant instances are created for users related to the **Subject** (e.g. their **Manager** or **Appraiser**) and the subject themselves. Each participant has their own **participant instance**, and the progress of each instance contributes to the **subject instance** completion tracking.

Setting	Description	Notes
Creation range	Select from two options: • **Limited:** The user selects an opening date and a closing date, between which subject instances for eligible assigned users will be created. • **Open-ended:** There is no closing date, meaning the activity will generate subject instances for any eligible assigned users from the opening date onward.	-

Date type	Select from two options:
	• **Fixed:** With fixed dates you simply enter the calendar dates you want to use. You can also select the timezone for the selected date (this will default to the server timezone).
	• **Relative:** Relative dates allow you to choose dates relative to when the activity instance is created, e.g. within two weeks. With dynamic dates you can configure the following:
	  ◦ Select the number of **Days** or **Weeks**, then **Before** or **After** your selected criteria.
	  ◦ Select whether you want your date range to be based on the **Completion date of another activity**, **Date first assigned to this activity**, the **Instance creation date of another activity**, **Job assignment start date**, or the **User creation date** (i.e. when the user's account was created).
	  ◦ If you selected **Completion date of another activity** or **Instance creation date of another activity** then you will need to select an activity from the dropdown list.
		Fixed dates apply to all assigned users, so everyone is bound by the same dates, whereas **Relative** dates are personal to the assigned user, because it is relative to another date or event in relation to that user.
		
		An example of a **Fixed** and **Limited** date range could be:
		
		9 April 2020 Europe/London to 9 December 2020
		
		An example of a **Relative** and **Open-ended** date range could be:
		
		2 weeks after Completion date of another activity - Probation appraisal

Creation frequency	Select from two options:
	
	• **Once:** A single instance will be created for each user.
	• **Repeating:** As long as the activity is assigned to a user instances will be created based on the settings selected. You can set a maximum number of instances per user, or set no maximum limit. When using repeating dates you can choose from the following options to decide when additional instances should be created for assigned users:
	  ◦ Time since creation of previous instance: X days/ weeks
	  ◦ Completion of previous instance, once minimum time since creation has passed: X days/ weeks
	  ◦ Time since completion of previous instance:
		When using you enable **Repeating** you may want to use each of the available options in the following scenarios.
		
		Every X days/weeks after the creation of their previous instance: Use for activities you know users will complete immediately.
		
		When previous instance is complete, and it was created more than X days/weeks ago: Use when you don't want instances to be created too frequently, for example if users could complete the activity immediately but you still want to space out instances.
		
		Every X days/weeks after the completion of their previous instance: Use for activities that have a larger window for completion. If you're not sure when the participants will complete the activity then this ensures that users won't have multiple instances created at the same time.

Due date	Select from two options: • **Enabled:** Enabling this setting allows you to set a due date for the end users to complete the activity. You can set the due date as a number of days or weeks after the instance is created. • **Disabled:** There is no deadline for submitting responses, meaning users are free to complete the activity at their own pace.	If a due date is set then it will be displayed in the end users' lists of activities, as well as in the subject and participant instance reports. The due date also acts as a trigger for certain notifications. See more about Performance activity notifications below.
Job assignment-based instances	Select from two options: • **Disabled:** A single subject instance will be created for each user drawing participants from all of their job assignments (if applicable). • **Enabled:** A subject instance will be created for each of a user's job assignments.	If this setting is enabled but a user has no job assignments then a subject instance will not be created for the user. Note that if you select **Disabled** you will not be able to use **Job assignment start date** as a reference date for relative scheduling, as the user could have multiple start dates for their different job assignments.

Once your performance activity is ready to go, you need to activate it either using the **Activate** button in the top banner (visible at the top of each tab while editing the activity) or from the **Manage performance activities** page.

Performance activity notifications

When editing a performance activity you can configure which notifications are sent to participants by going to the **Notifications** tab.

You can toggle each notification type on, and expand each section to determine which participants will receive the notification. Even once an activity has been activated you can still change the notification settings.

When choosing who will receive a notification you might want to consider the needs of each relationship. For example any relationship set to be a view-only participant may not want to be notified when instances are created but may want to be notified when they are completed so they can go and view the responses. Another example is that it may be the case that only managers and subjects want to receive notifications about the **Completion of subject instance**. It is advisable to consider relationships when configuring notifications to avoid sending unnecessary or unwanted notifications.

You can configure the following notifications:

Notification	Description	Message text for Subject	Message text for other relationships
Participant selection	This notification is sent to the selected recipients when an activity is activated so that the recipients are notified to select participants as defined in the **Selection of participants** section on the **General** tab. The recipient selection for the following notification recipients is dependent on the responding and view-only participants enabled via the **Content** tab.	Hi {$a->recipient_fullname}, You need to select who you want to participate in your {$a->activity_name} {$a->activity_type}. Please complete this as soon as possible, to give participants time to provide their input. {$a->conditional_duedate} You can select participants through this link: {$a->participant_selection_link}	Hi {$a->recipient_fullname}, As {$a->subject_fullname}’s {$a->participant_relationship}, you need to select who should participate in the following activity: {$a->activity_name} {$a->activity_type} Please complete this as soon as possible, to give participants time to provide their input. {$a->conditional_duedate} You can select participants through this link: {$a->participant_selection_link}
Participant instance creation	When a participant instance is created, this notification is sent to the selected recipients.	Hi {$a->recipient_fullname}, Your {$a->activity_name} {$a->activity_type} is ready for you to complete. {$a->conditional_duedate} You can access the activity through this link: {$a->activity_link}	Hi {$a->recipient_fullname}, As {$a->subject_fullname}’s {$a->participant_relationship}, you have been selected to participate in the following activity: {$a->activity_name} {$a->activity_type} {$a->conditional_duedate} You can access the activity through this link: {$a->activity_link}
Participant instance creation reminder	This notification is sent to the selected recipients to remind them that a participant instance has been created based on the trigger events enabled.	Hi {$a->recipient_fullname}, {$a->instance_days_active} days ago you were sent your {$a->activity_name} {$a->activity_type} to complete. {$a->conditional_duedate} You can access the activity through this link: {$a->activity_link}	Hi {$a->recipient_fullname}, {$a->instance_days_active} days ago you were selected to participate in the following activity as {$a->subject_fullname}’s {$a->participant_relationship}: {$a->activity_name} {$a->activity_type} {$a->conditional_duedate} You can access the activity through this link: {$a->activity_link}
Due date approaching reminder	This notification is sent to the selected recipients to remind them that a due date is approaching for an activity, based on the trigger events enabled.	Hi {$a->recipient_fullname}, Your {$a->activity_name} {$a->activity_type} is due to be completed in {$a->instance_days_remaining} days. Please ensure you complete it by {$a->instance_duedate}. You can access the activity through this link: {$a->activity_link}	Hi {$a->recipient_fullname}, The following activity is due to be completed in {$a->instance_days_remaining} days: {$a->activity_name} {$a->activity_type} You were selected to participate in this activity as {$a->subject_fullname}’s {$a->participant_relationship}. Please ensure you complete it by {$a->instance_duedate}. You can access the activity through this link: {$a->activity_link}
On due date reminder	This notification is sent to the selected recipients to remind them that the activity due date has been reached.	Hi {$a->recipient_fullname}, Your {$a->activity_name} {$a->activity_type} is due to be completed today. Please ensure you complete it by the end of the day. You can access the activity through this link: {$a->activity_link}	Hi {$a->recipient_fullname}, The following activity is due to be completed today : {$a->activity_name} {$a->activity_type} You were selected to participate in this activity as {$a->subject_fullname}’s {$a->participant_relationship}. Please ensure you complete it by the end of the day. You can access the activity through this link: {$a->activity_link}
Overdue reminder	This notification is sent to the selected recipients to remind them that the activity is overdue, based on the trigger events enabled.	Hi {$a->recipient_fullname}, Your {$a->activity_name} {$a->activity_type} was due to be completed on {$a->instance_duedate} and is now overdue. Please ensure you complete it as soon as possible. You can access the activity through this link: {$a->activity_link}	Hi {$a->recipient_fullname}, The following activity was due to be completed on {$a->instance_duedate} and is now overdue: {$a->activity_name} {$a->activity_type} You were selected to participate in this activity as {$a->subject_fullname}’s {$a->participant_relationship}. Please ensure you complete it as soon as possible. You can access the activity through this link: {$a->activity_link}
Completion of subject instance	This notification is sent to the selected recipients to let them know the subject instance has been completed.	Hi {$a->recipient_fullname}, Your {$a->activity_name} {$a->activity_type} has been completed by all participants. You can review the completed activity through this link: {$a->activity_link}	Hi {$a->recipient_fullname}, The following activity has been completed by all participants: {$a->activity_name} {$a->activity_type}: {$a->subject_fullname} Thank you for your participation. You can review the completed activity through this link: {$a->activity_link}
Reopened activity	This notification is sent to the selected recipients to let them know the subject instance has been reopened.	Hi {$a->recipient_fullname}, Your {$a->activity_name} {$a->activity_type} has been reopened and requires further action from you to complete it. You can access the activity through this link: {$a->activity_link}	Hi {$a->recipient_fullname}, The following activity has been reopened: {$a->activity_name} {$a->activity_type}: {$a->subject_fullname} As {$a->subject_fullname}’s {$a->participant_relationship}, it requires further action from you to complete it. You can access the activity through this link: {$a->activity_link}

Editing the notification text

The message text for these notifications can be modified by following these steps:

1. Go to *Quick access menu > Localisation > Language customisation.*
2. Choose the language you wish to edit from the dropdown menu e.g. English (en).
3. Click **Open language pack for editing**.
4. Click **Continue** once the language pack loads to 100% (the button can take a moment to appear).
5. Select **perform.php** under the **mod** heading in the **Show strings of these components** box.
6. Click **Show strings**.
7. Find the message text you wish to edit (these tend to be located on page 6 or 7 of the results).
8. When you are done click **Save changes to the language pack**.

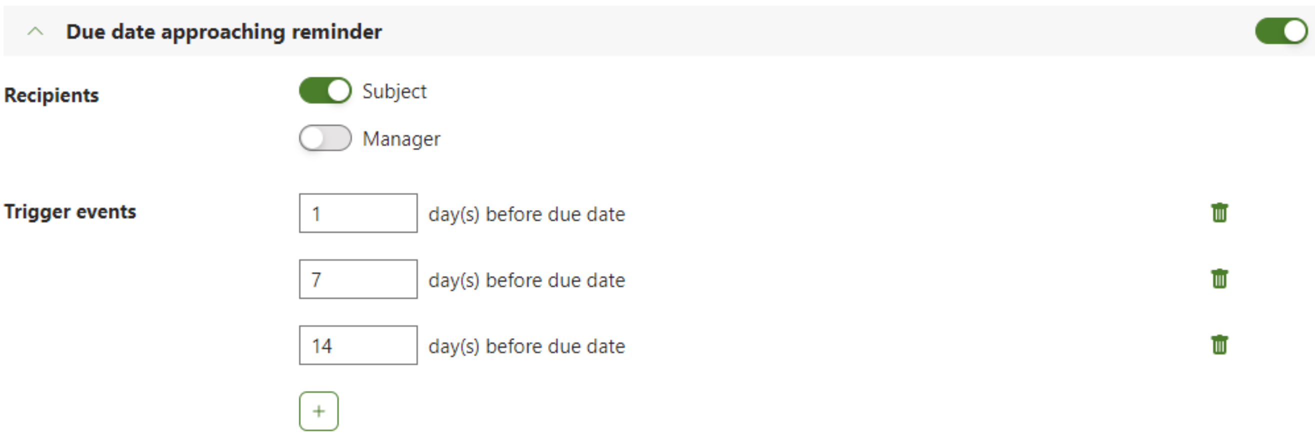
Remember to use the placeholders where applicable in your customised messages.

Reminder notifications

For the reminder types of notification (e.g. **Participant instance creation**, **Due date approaching**, and **Overdue reminders**) you can set triggers.

Triggers are a set number of days either before or after an event that a notification will be sent. You can set multiple triggers for a single reminder. For example you might set the **Due date approaching reminder** to be sent at 14 days, 7 days and 1 day before due date.

Only users who have not completed their participant instances will receive any enabled reminders.



Below you can see more details of the available triggers.

Reminder	Trigger
Participant instance creation reminder	X day(s) after instance creation.
Due date approaching reminder	X day(s) before due date.
Overdue reminder	X day(s) after due date.

You cannot set a trigger for the **On due date reminder** as this is sent on the performance activity's due date. Please look at the **Due date approaching reminder** to set a reminder before the due date or the **Overdue reminder** to set a reminder after the due date.

Manually add participants

Peer, Mentor, Reviewer and External respondents are manually populated relationships. This means that for each subject instance of the activity these relationships need to be manually selected.

On the **General** tab of an activity, the activity creator can set who should perform that manual population (per instance), i.e. be the 'selector'. The **Selection of participants** setting allows you to choose the selector from the following users:

- The subject themselves
- Manager
- Manager's Manager
- Appraiser

The Manager, Manager's Manager and Appraiser relationships are all automatically derived from what is set on the user's job assignment.

The user(s) acting as selector(s) will receive a notification that they need to perform this selection. Once a manually populated relationship has been invoked in the activity (by adding them as a participant on at least one section), that selection will have to take place to enable it to proceed. It's possible that multiple 'selectors' are identified for a particular manually populated relationship (for example because multiple users fulfil the role of 'manager') however only one of those users needs to make a selection for the activity to proceed.

Regardless of whether manual relationships are being used in the the activity, the **Selection of participants** setting will always appear on the **General** tab. This setting can simply be ignored if you do not require relationships to be set manually.

Example

As an illustration of how this setting can be used let's look at an example where you want to create an activity in which a subject's peers should participate. Using the **Selection of participants** setting on the **General** tab you can decide who the most appropriate person is to select these participants (since 'peer' is not a formally represented relationship in Totara). You can decide if the subject should choose the peers they want to participant themselves, or if the subject's manager should select the peers to ensure impartiality.

The relationship pairing set up in the particular subject instance (e.g. who is selected as the subject's peers) does not persist outside of that instance. So if you wanted to have the same participants next time (i.e. the same people considered to be the subject's peers), they would need to be reselected for that instance.

Adding external participants

When you create a performance activity if you have set one of the **Responding participant** or **View-only participant** places to be an external participant then their details will need to be added in order to get access. An external participant is someone outside of your organisation who does not normally have access to you system, for example this might be a customer, contractor, or someone you are collaborating with from another company.

When creating an activity

These first steps must be completed when the activity is being created, and before it is activated.

1. Add **External participant** as one of the **Responding participants** (under the **Content** tab).
2. Set the user you want to select the external participant(s) in **Selection of participants** (under the **General** tab).

Once the subject instance is generated

After the activity has been activated the user responsible for selecting the external participant must select them.

If you have enabled notifications for subject instance creation then the person responsible for choosing external participants will receive a notification with a link that will take them to the selection interface.

Otherwise they will need to follow these steps:

1. From the top navigation bar go to *Develop* > *Activities*.
2. In the banner above the table click **Select participants.**
3. Find the activity and add the **Name** and **Email** of the desired external participant.
4. Use the plus button to add any additional external participants.
5. Click **Save** to save the selection.

This will then send an email notification to the external participant using the **Instance creation** notification template.

You must add all of the desired external participants at the same time as you will be unable to repeat this action once you click **Save**.

Viewing as an external participant

Once you have invited the external participant by entering their email address they will receive an email notification. They will then need to follow these steps:

1. Open the email notification and click the link (this will take them directly to the performance activity).
2. Complete the activity.
3. Click the **Submit** button to save and submit their responses.

The external participant will be able to use the link to access the performance activity as many times as necessary. This means they can **Save as draft** if they are not able to complete the activity in a single session.
If the subject instance is closed then the external participants link will still work but they will no longer be able to complete the activity and will instead see a message informing them the activity is closed.

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.