Completing a performance activity

This is a transcript of a video on the Totara Academy

Welcome to this video on completing a performance activity in Totara Perform.

00:19

Performance activities are appraisals, 360 feedback and check-ins. Based on a template, a new instance of an activity is assigned to each user in the assignment group. In this video, we'll look at what happens once an activity has been created and assigned.

In this case, I'm logged in as a Manager. I have two options to see the performance activities that require my attention. I can use my **Performance overview** page, which shows a summary of all my performance-related activities. Note that only activities about me are shown here. I can see that I have an overdue activity I need to complete.

00:32

But as a Manager, I'm likely to have other activities relating to my peers or team members. If I go to **Develop** and then **Activities**, I can see all of the activities currently assigned to me.

Each tab on this screen shows the activities I need to complete, based on the role I have in the activity. So, on the first tab, I can see all of the activities which are about me, where I am the subject. These are the ones I would also see on my Performance overview page.

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On this tab, I can see all of the activities I need to complete as someone's Manager.

And on this tab, I can see any peer reviews I've been assigned. I only see the tabs which have activities in them.

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At the top of each tab, you'll find a card for each live activity, presented in priority order (based on due date). Only activities where you still need to complete your part will be shown here.

Below the cards, you'll find a list of all activities assigned to you.

As a Manager of a team, I have quite a few activities listed on this tab.

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To find the activities requiring my attention, I can enter a search in this field or use the **Filters**, for example, to find activities that are **Overdue** or to only show activities which are **Incomplete**.

In the table, I can also see my progress on the activity, and whether it is overdue. I'll select an activity to complete it.

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At the top I can see whether my answers are anonymous or whether other participants can see them. For feedback, it's common practice for this to be anonymous.

I can see the questions I need to answer below and how many sections there are. I can also use this progress view to move between sections.

Once I've made some progress, I can choose **Save as draft** to save my answers and return to them later, or **Complete section** to finalise my response.

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If responses are **anonymised**, my response will only become visible once all responses are submitted, and the activity is closed.

If **manual closure** is enabled, I can still edit my responses until I choose to finalise and close the activity.

If **section closure** is enabled, once I submit a section, I can no longer edit it.

The ability to change my answers after submission depends on the settings configured for the activity.

01:58

Now let’s have a look at my own check-in activity.

In this activity, my manager and I will both answer the questions in advance of our meeting, as a starting point for our conversation. I can see at the top here that my manager will be able to see my responses once I submit them, and I can also see the answers they have given. I can choose to turn this off to avoid being overwhelmed by the amount of information on screen or influenced by others’ answers if I want to.

As with the feedback, I then answer the questions, and **Submit** when I’m ready.

02:11

So that’s completing an assigned performance activity in Totara Perform.