TOTARA PERFORM:
CREATING A CHECK-IN

This is a transcript of a video on the Totara Academy

WELCOME TO THIS VIDEO ON CREATING CHECK-INS IN TOTARA PERFORM.

A check-in is usually a regular meeting between a manager and team member to discuss their performance and progress. In Totara Perform, a check-in is created as a performance activity. So, I'll start by selecting **Activity Management** from the quick access menu.

Here you can see all of the performance activities created on this site. A performance activity in this list is essentially a template for an activity that can be assigned to groups of users on your site. Each user would then have their own instance of the template created. In this list, you can see the **Type** of activity it is – whether it's an **Appraisal, Check-in** or **Feedback** when the activity was created and the **Status**. There are two statuses you might see here; **Draft** (the activity is still being created and hasn't yet been assigned) or **Active**.

You can take some actions directly from this page. The first icon allows you to manage participation – where you can manually add a participant or close activities for a specific user (for example, if the user was on long-term sick), or even manually reopen a submitted section for a particular user if they want to make changes. This takes you to a page which shows all of the instances of this activity in use on your site.

You can also quickly access reports on participation within an activity using this icon.

Here we can see the progress individuals have made and whether or not they are overdue.

You can also **Clone** or **Delete** an activity using this icon.

But I'm here to create a new activity so I'll select **Add activity**.

I'll give my activity a **Title** and provide an optional **Description**, which is only seen by Site Administrators.

I'll indicate that this is a **Check-in** and then **Create**. Note that all of this information can be updated until the activity is activated.

Now it's time to set up my template. I'll start on the **General** tab.

At the top you can see the information I just added, which you can also amend here until you activate the activity.

If you were creating a different kind of activity you might want to **Anonymise responses**, but that's not appropriate for my check-in.

I can decide whether to restrict visibility of each participant's responses to other participants. Again, that's not relevant to my check-in.

I'll move onto the **Content** tab.

Activities are split into sections, and here I can decide whether a section should be automatically closed once a user completes it. Once a section is closed, it can't be reopened by the user to prevent further editing, but can be manually reopened by a Site Administrator if needed.

If you want the activity to end at the due date, regardless of whether participants have completed it, you can also choose **Automatic closure: On due date**, where all instances of this activity will be automatically closed once the due date is reached. To use this option, you also need to set a due date on the **Instance creation** tab. We'll come back to this tab but I'll quickly enable a **Due date s**o that I can turn on this feature.

This feature is useful when used in conjunction with the triggers for repeating activities. For example, if you want to base the creation of a new instance on completion of a previous instance, setting automatic completion based on the due date ensures these dates don't drift out.

You can also decide whether the activity is all in one section or split it into multiple sections. Multiple sections allow more flexibility around completion, because a user can complete individual sections at different times, and you can reopen different sections if required in future, without affecting other sections.

If I turn this on, you can see I now have the option to add a second section below my existing one.

It's now time to add content to my check-in –the questions and information I want to include in the template. There are a lot of options here, so this is covered in a separate video. So let's assume I've now done this.

My next step is to decide which users in the system it should be assigned to.

You can assign performance activities based on a user's **Audience**, **Organisation** or **Position**, or assign it to an **Individual** user by name.

I'll say that all users in my 'New starters' audience should be assigned this check-in.

I'll also assign it to an individual.

If you add someone by mistake or want to remove them, you can do that here using the **X** icon.

If I wanted my check-in to include a peer, mentor, reviewer or external respondent, I would also need to decide who will choose the individuals to fill those roles. I don't need to do this for roles the system already knows about, such as the manager relationship. By default, the subject of the check-in will be asked to identify these people, but you can change this here if you wish.

Now I need to decide when instances of the activity should be generated for users in this audience. There are a range of options here.

You can leave the creation open ended, so anyone in this audience will have an instance created for them from the **Start date** or set a **Limited** time period for instance creation. In this case, only users who meet the audience rule during the time frame and the individual I assigned by name are created an instance.

You can also decide whether the activity will be assigned to all users from a set, **Fixed** date, or whether it will be **Relative** to the user in question.

If you choose a relative date, you decide what to use as the **Reference date.** I'll say that users in my audience should be assigned the first instance of the activity four weeks after the **User creation date** for my new starters.

I'll also set this up as a recurring monthly event with a **Trigger** of 4 weeks since creation of the previous instance. This will create a new instance even if the previous instance was not completed.

If you want activity completion to be the trigger, you can also choose time since completion of previous instance. Remember that using **Automatic closure: On due date** will ensure that the check-in occurs regularly every four weeks, regardless of whether the previous instance was completed by participants.

I already enabled a Due date earlier, so I can leave this setting.

I'll save my changes.

This warning lets me know that no individual instances of this activity will be created for the users in my audience because the activity is still in draft.

Finally, you decide which **Notifications** are sent and to whom.

Select the notifications you want to enable and the participants you want to receive the notification.

The final step to create instances for your users is to **Activate** your activity.

Instances for the named individual and all users in the audience have been assigned. Those users can now begin to record their check-ins through Totara Perform!

End