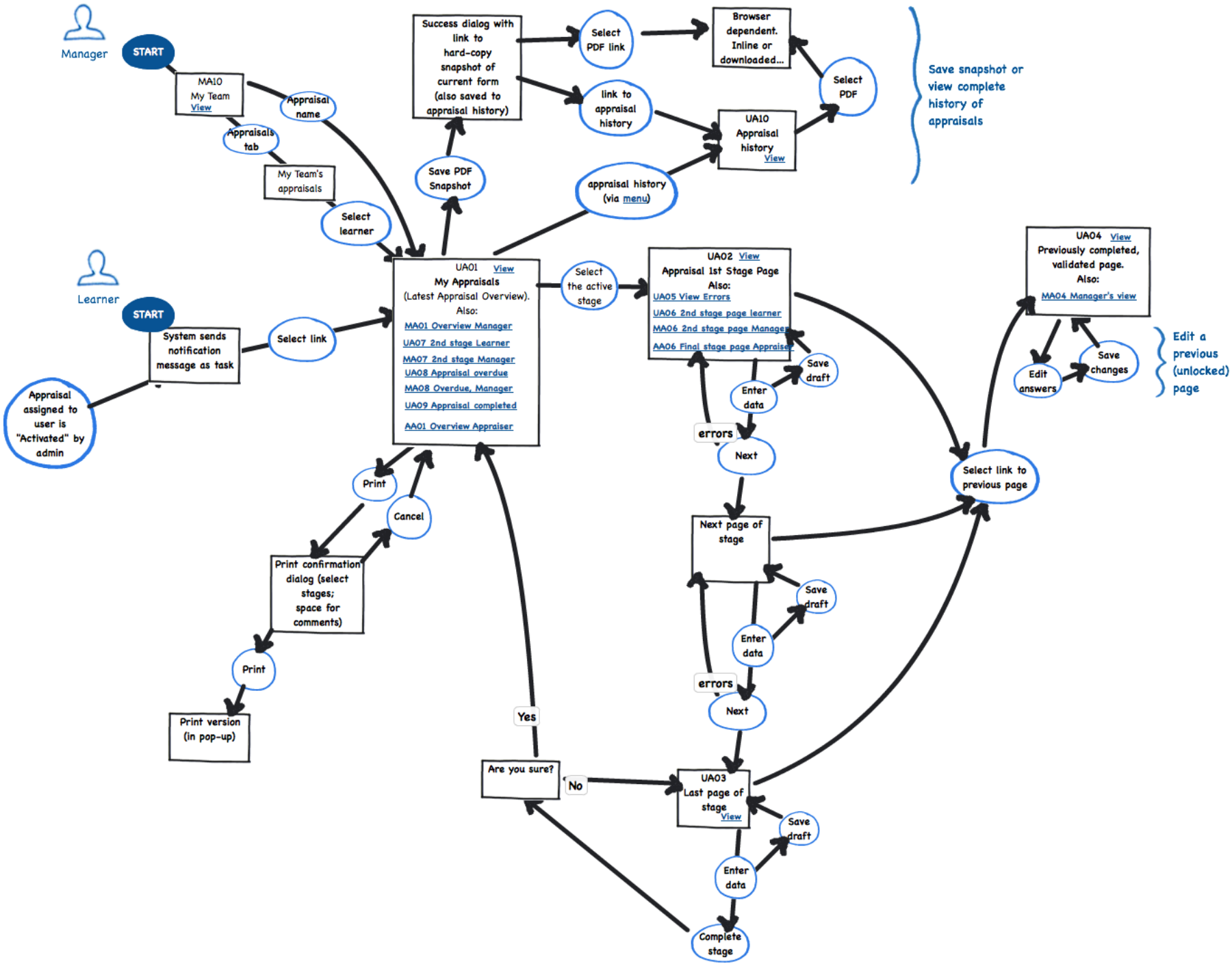
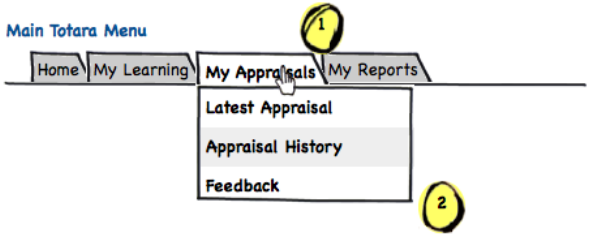

Manager
START
MA10
My Team
View
Appraisal name
Appraisals tab
My Team's appraisals
Select learner
Success dialog with link to hard-copy snapshot of current form (also saved to appraisal history)
Select PDF link
Browser dependent. Inline or downloaded...
link to appraisal history
UA10
Appraisal history
View
Select PDF
Save snapshot or view complete history of appraisals
Save PDF Snapshot
appraisal history (via menu)
Learner
START
System sends notification message as task
Select link
Appraisal assigned to user is "Activated" by admin
UA01 View
My Appraisals
(Latest Appraisal Overview).
Also:
MA01 Overview Manager
UA07 2nd stage Learner
MA07 2nd stage Manager
UA08 Appraisal overdue
MA08 Overdue, Manager
UA09 Appraisal completed
AA01 Overview Appraiser
Select the active stage
UA02 View
Appraisal 1st Stage Page
Also:
UA05 View Errors
UA06 2nd stage page learner
MA06 2nd stage page Manager
AA06 Final stage page Appraiser
Save draft
Enter data
errors
Next
UA04 View
Previously completed, validated page.
Also:
MA04 Manager's view
Edit answers
Save changes
Edit a previous (unlocked) page
Select link to previous page
Print
Cancel
Print confirmation dialog (select stages; space for comments)
Print
Print version (in pop-up)
Next page of stage
Save draft
Enter data
errors
Next
Yes
Are you sure?
No
UA03
Last page of stage
View
Save draft
Enter data
Complete stage

UA00b My Appraisals - Menu

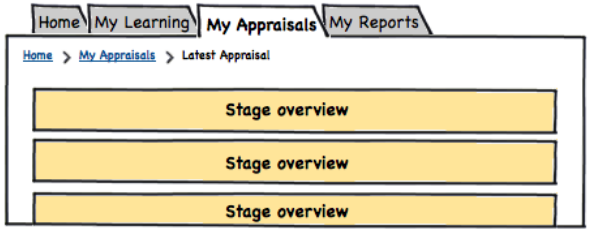
Main Totara Menu



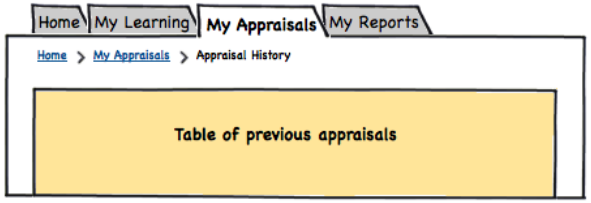
Rules:
1. Only display tab when a user is associated with a workflow (either active or historic) or if the feedback tabs should be shown (see below). The "My Appraisals" main page shows the most recently assigned appraisal details.
When clicking the 'My Apprasials' tab, the user is taken automatically to the Latest Appraisal.

2. Feedback options appear only if their are active feedback forms

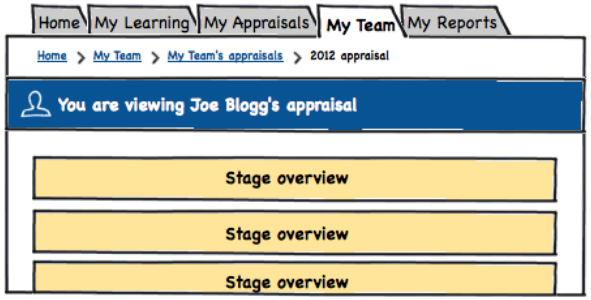
Appraisal page layout (learner viewing own appraisal)



Appraisal page layout (learner viewing own history)



Appraisal page layout (manager viewing a learner's appraisal)



Appraisal page layout (manager viewing a learner's history)

UA01 Appraisal Overview Learner Start

Home | My Learning | My Appraisals | My Reports

Home > My Appraisals > 2012 Appraisal

2012 appraisal

Save PDF Snapshot | Print

Preparation Stage In progress

Complete by 10 June 2012

The purpose of this stage is to get ready for the appraisal meeting. The appraisee should enter information for the manager to view and sign off.

- You must complete this stage
- Your manager must complete this stage

Start

Meeting Stage Unavailable

Complete by 10 August 2012

This stage involves a face-to-face meeting between manager and their staff. The manager should mark this stage as complete when the meeting is over.

- Your manager must complete this stage

Write-up Stage Unavailable

Complete by 11 October 2012

This stage occurs after the meeting and allows the manager and staff member to input any actions decided in the meeting and prepare the staff member's new learning plan.

- You must complete this stage
- Your manager must complete this stage

Sign-off Stage Unavailable

Complete by 10 December 2012

Once the appraisal is complete the whole process must be signed off by the staff member's appraiser.

- Your appraiser must complete this stage

A snapshot of your appraisal has been saved to your appraisal history

Download now | Close

Print your appraisal

Choose which sections to include:

- ☑ Preparation stage
- ☑ Meeting stage
- ☑ Write-up stage
- ☑ Sign-off stage

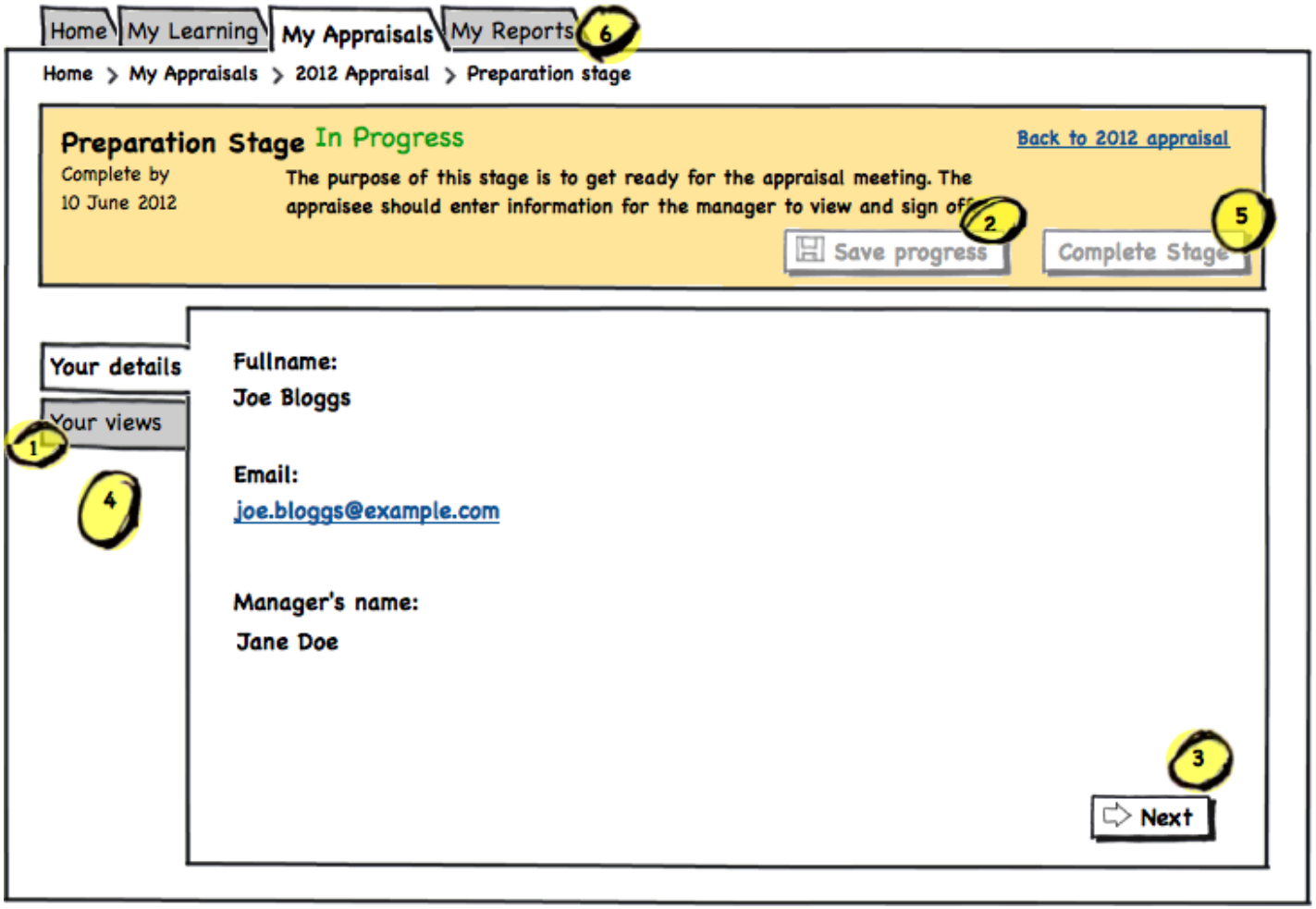
☐ Leave space on print-out to write comments

Print now | Cancel

Can another role take a snapshot of a user's appraisal? If so does it show the content as seen by the role or by the appraisee? Does this snapshot get listed on the appraisal history page with the others?

Rules:
1. Only 1 stage is active at a time, subsequent stages are not available until the previous one is completed
2. Stages are always submitted from the form itself (not this overview page). This allows us to maintain a single call to action on this page (for current action). This button takes the user to the first page of the current stage. Once a stage is in progress for a user, the 'Start' button changes to 'Continue'.
3. If a stage must be completed by multiple roles, the stage is not complete until all roles have completed it
4. If a stage is not locked on completion, a user can go back into the

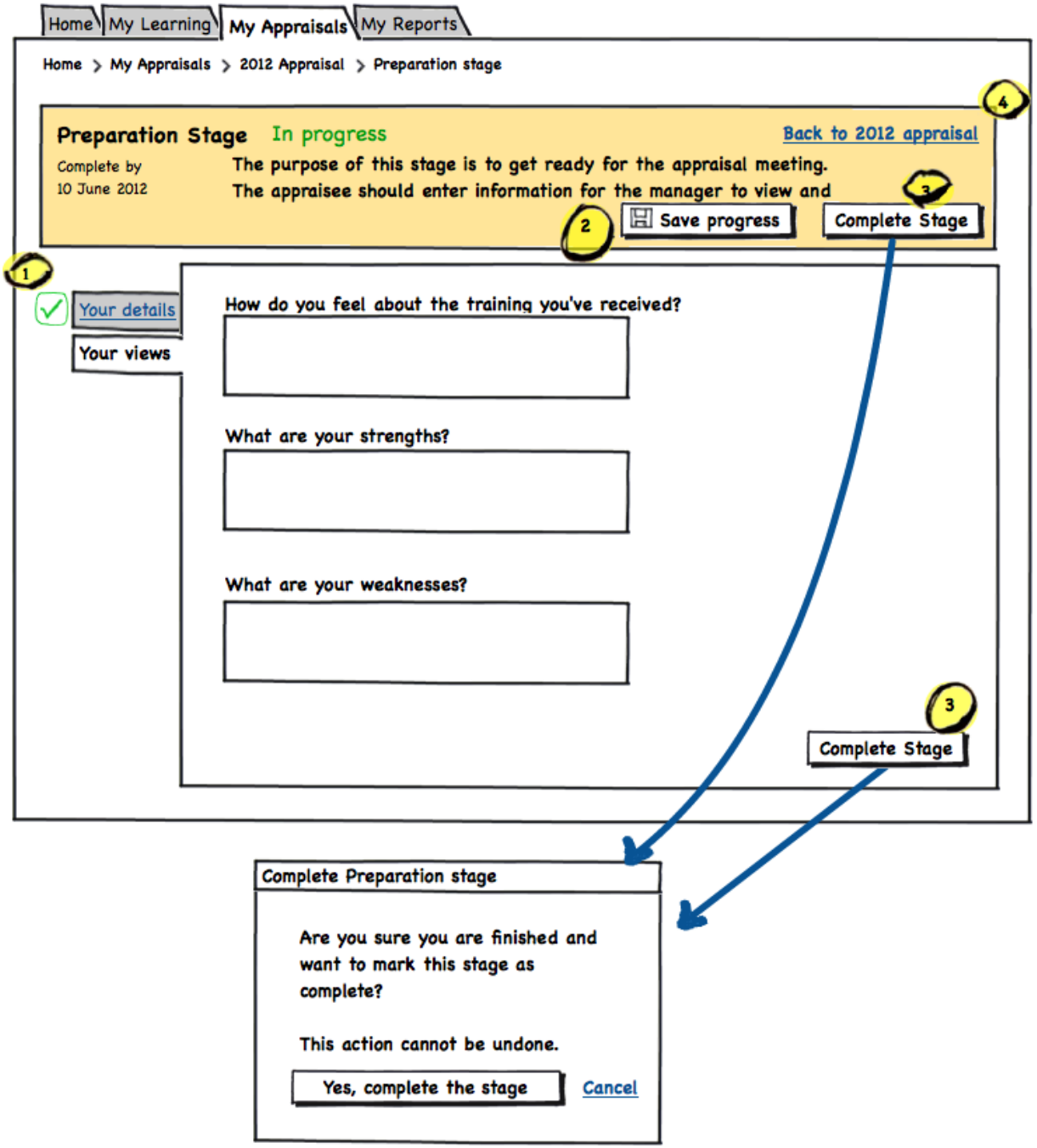
UA02 Appraisals Page Learner



Rules:

1. Subsequent pages within a stage are visible but not clickable until user completes current page by pressing 'Next'
2. Save progress doesn't validate page (you can save at any time). This button is hidden if form has no editable fields.
3. 'Next' button does validate form, user cannot progress if there are invalid or missing required fields.
4. Pages from subsequent stages are not shown
5. Complete Stage is unavailable until the user has validated all pages except the current page.

UA03 Appraisals Last Page Learner



Rules:
1. Previous pages are accessible, if the user has appropriate permissions. If the previous page belongs to a different stage than the current one, the system must check to see if it has been locked (in which case it will be read only). Otherwise it will be editable.
2. Save progress doesn't validate page (you can save at any time). This button is hidden if form has no editable fields.
3. Complete Stage is unavailable until the user reaches the last page, wherupon it displays in place of teh 'next' button (as well as in the header bar which supports scenarios where stages have no forms).
4. The header panel 'sticks' to the top of the browser window so the buttons are always visible

User gets to last page and 'Complete stage' button is activated. The user may answer all questions on this page or not, but before they click 'complete stage' the user go backs to a previous page. The 'Complete Stage' button should disable again.

Add a tick when page is validated (upon Next).
'Complete stage' button is active when all but current page

UA04 Appraisals, Previous Page, Learner

Go to MA04 Manager's view

Home | My Learning | My Appraisals | My Reports

Home > My Appraisals > 2012 Appraisal > Preparation stage

Write up Stage In progress

Back to 2012 appraisal overview

Complete by
10 August 2012

The purpose of this stage is to record all decisions and discussion from during the appraisal meeting. The appraisee should enter information for the manager to view

2 Save progress | Complete Stage

1 Your details
Your views
Post meeting
New learning

How do you feel about the training you've received?

It's been ok. I'd rather have more feedback.

What are your strengths?

I'm a great team player.

What are your weaknesses?

Can't think of anything, too modest perhaps.

Save changes

Rules:
1. Previous pages from current and previous stages are accessible, if the user has appropriate permissions. If the previous page belongs to a different stage than the current one, the system must check to see if it has been locked (in which case it will be read only). Otherwise it will be editable (as shown).
2. The 'Save progress' and 'Complete stage' buttons are disabled when a user who has visited and filled in all the required fields from the last page of their current stage, and saved progress, goes back to an unlocked previous stage's page.

UA05 Appraisals Last Page Learner - Errors

Home | My Learning | My Appraisals | My Reports

Home > My Appraisals > 2012 Appraisal > Preparation stage

Preparation Stage In progress

Back to 2012 appraisal

Complete by
10 June 2012

The purpose of this stage is to get ready for the appraisal meeting. The appraisee should enter information for the manager to view and sign off.

Save progress | Complete Stage

Your details

Your views

There are errors on this page that need fixing before you can continue.

A question *

Entered data

You must respond to this question:

Another question *

Last question *

- option 1
- option 2

Complete Stage

UA06 Appraisals 2nd Stage Page Learner Go to manager's view of this page

Home | My Learning | My Appraisals | My Reports

Home > My Appraisals > 2012 Appraisal > Write up stage

Write up Stage In progress

Back to 2012 appraisal overview

Complete by
10 August 2012

The purpose of this stage is to record all decisions and discussion from during the appraisal meeting. The appraisee should enter information for

Save progress | Complete Stage

- ✓ Your details
- ✓ Your views
- ✓ Post meeting decisions
- New learning plan

Summary of performance for year

Manager's answer:
Joe did well but I expected more from him.

Summary of objectives for next year

Manager's answer:
Joe needs to pick up his game in the following areas: punctuality, presentation; effort;

Comments

This is expected. I have suffered from lack of direction and clear communications from my seniors.

Your manager has not yet responded.

Next

UA07 Appraisals Overview 2nd Stage Learner Go to Manager's view

2012 appraisal

Save PDF Snapshot Print

Preparation Stage Completed

1

Complete by
10 June 2012

The purpose of this stage is to get ready for the appraisal meeting. The appraisee should enter information for the manager to view and sign off.

- You must complete this stage
- Your manager must complete this stage

Meeting Stage In progress

3

View

Complete by
10 August 2012

This stage involves a face-to-face meeting between manager and their staff. The manager should mark this stage as complete when the meeting is over.

- Your manager must complete this stage

Write-up Stage Unavailable

Complete by
11 October 2012

This stage occurs after the meeting and allows the manager and staff member to input any actions decided in the meeting and prepare the staff member's new learning plan.

- You must complete this stage
- Your manager must complete this stage

Sign-off Stage Unavailable

Complete by
10 December 2012

Once the appraisal is complete the whole process must be signed off by the staff member's appraiser.

- Your appraiser must complete this stage

Rules:
1. When completed a stage is clearly marked
2. The users who must complete each stage have their status individually marked too, but visually this is less important
3. View button takes you to the first page of the stage, unless there is no page or no page you can see, in which

UA08 Appraisals 2nd Stage Overview Learner Go to manager's view

2012 appraisal

Save PDF Snapshot | Print

Preparation Stage Completed

Complete by
10 June 2012

The purpose of this stage is to get ready for the appraisal meeting. The appraisee should enter information for the manager to view and sign off.

- You must complete this stage
- Your manager must complete this stage

Meeting Stage Completed

Complete by
10 August 2012

This stage involves a face-to-face meeting between manager and their staff. The manager should mark this stage as complete when the meeting is over.

- Your manager must complete this stage

Write-up Stage Overdue

Complete by
11 October 2012

This stage occurs after the meeting and allows the manager and staff member to input any actions decided in the meeting and prepare the staff member's new learning plan.

- You must complete this stage
- Your manager must complete this stage

1 Start

2

Sign-off Stage Unavailable

Complete by
10 December 2012

Once the appraisal is complete the whole process must be signed off by the staff member's appraiser.

- Your appraiser must complete this stage

Rules:
1. If a stage is incomplete when the stage end date passes, the whole stage will be marked as overdue.
2. The stage lists who has and hasn't completed it, but even if the user has done their part, the

UA09 Appraisals Completed

2012 appraisal

✓ This appraisal was completed on 14th June 2010. (1)

View (2) Print

Preparation Stage Completed

Complete by
10 June 2012

The purpose of this stage is to get ready for the appraisal meeting. The appraisee should enter information for the manager to view and sign off.

- ✓ You must complete this stage
- ✓ Your manager must complete this stage

Meeting Stage Completed

Complete by
10 August 2012

This stage involves a face-to-face meeting between manager and their staff. The manager should mark this stage as complete when the meeting is over.

- ✓ Your manager must complete this stage

Write-up Stage Completed

Complete by
11 October 2012

This stage occurs after the meeting and allows the manager and staff member to input any actions decided in the meeting and prepare the staff member's new learning plan.

- ✓ You must complete this stage
- ✓ Your manager must complete this stage

Sign-off Stage Completed

Complete by
10 December 2012

Once the appraisal is complete the whole process must be signed off by the staff member's appraiser.

- ✓ Your appraiser must complete this stage

(3) ⚠ This appraisal was cancelled on 17th May 2010.

Rules:
1. When the whole appraisal is complete, the heading includes a message indicating that is complete and giving the completion date.
2. For complete appraisals the "Save PDF Snapshot" option disappears (since the appraisal can no longer be changed). It is replaced by a "View" button (to let a user view the form).
3. If the appraisal was cancelled

UA10 Appraisal History Learner

Home | My Learning | My Appraisals | My Reports

Home > My Appraisals > Appraisal history

Appraisal history

1 2

Name	Start date	End date	Status
2012 Appraisal (current)	10/4/12	10/12/12	Active
Snapshot 14/10/12 14:43			
Snapshot 23/08/12 09:43			
2011 Appraisal	10/4/11	10/12/11	Complete
Snapshot 16/04/11 11:47			
2010 Appraisal	10/4/10	10/12/10	Complete

3

Rules:
1. "Start date" is the date the appraisal was activated (see A01)
2. "End date" is the complete by date of the last stage (see A05)
3. Links to old appraisals continue to work even when complete (everything locked

UA11 Appraisals Overview Appraisal cancelled 1

2012 appraisal

View Print

⚠ This appraisal was cancelled on 17th May 2012.

Preparation Stage Completed

Complete by
10 June 2012

The purpose of this stage is to get ready for the appraisal meeting. The appraisee should enter information for the manager to view and sign off.

- You must complete this stage
- Your manager must complete this stage

Meeting Stage Incomplete 3

Complete by
10 August 2012

This stage involves a face-to-face meeting between manager and their staff. The manager should mark this stage as complete when the meeting is over.

- Your manager must complete this stage

Write-up Stage Incomplete

Complete by
11 October 2012

This stage occurs after the meeting and allows the manager and staff member to input any actions decided in the meeting and prepare the staff member's new learning plan.

- You must complete this stage
- Your manager must complete this stage

Sign-off Stage Incomplete

Complete by
10 December 2012

Once the appraisal is complete the whole process must be signed off by the staff member's appraiser.

- Your appraiser must complete this stage

Rules:
1. If an appraisal is closed by an admin part way through (instead of being completed by the user) it is displayed differently
2. A message appears indicating it was cancelled
3. Any unfinished or not yet started stages are marked as "Incomplete"

MA01 Appraisal Overview Manager Start

Home | My Learning | My Team | My Appraisals | My Reports

Home > My Appraisals > 2012 Appraisal

You are viewing Joe Blogg's appraisal

2012 appraisal

Save PDF Snapshot | Print

Preparation Stage In progress

Complete by
10 June 2012

The purpose of this stage is to get ready for the appraisal meeting. The appraisee should enter information for the manager to view and sign off.

- You must complete this stage
- Joe Bloggs must complete this stage

Start

Meeting Stage Unavailable

Complete by
10 August 2012

This stage involves a face-to-face meeting between manager and their staff. The manager should mark this stage as complete when the meeting is over.

- You must complete this stage

Write-up Stage Unavailable

Complete by
11 October 2012

This stage occurs after the meeting and allows the manager and staff member to input any actions decided in the meeting and prepare the staff member's new learning plan.

- You must complete this stage
- Joe Bloggs must complete this stage

Sign-off Stage Unavailable

Complete by
10 December 2012

Once the appraisal is complete the whole process must be signed off by the staff member's appraiser.

- Joe Blogg's appraiser must complete this stage

MA04 Appraisals, Previous Page, Manager

Go to UA04 Learner's view

Stage has been LOCKED:

1. Save Progress button is disabled
2. Next button shown, but no need to validate - just take user to next page.

Home | My Learning | My Team | My Appraisals | My Reports

Home > My Team > Appraisals > 2012 Appraisal > Write up stage

You are viewing Joe Blogg's appraisal

Write up Stage In progress

Back to 2012 appraisal overview

Complete by
10 August 2012

The purpose of this stage is to record all decisions and discussion from during the appraisal meeting. The appraisee should enter information for

1 Save progress | Complete Stage

- Your details
- Your views
- Post meeting
- New learning

How do you feel about the training you've received?

We've spent a fortune on training Joe, and he continues to disappoint.

Joe's answer:
It's been ok. I'd rather have more feedback.

What are your strengths?

Joe relies heavily on charm and diplomacy. His skills are limited.

Joe's answer:
I'm a great team player.

What are your weaknesses?

Joe's not very good at trigonometry.

Joe's answer:
Can't think of anything, too modest perhaps.

2 Next

Stage has NOT been LOCKED:

Returning back to an unlocked page after it has already passed validation (whether a previous stage or the current stage). We can't let you save without validation now because you could browse back to the last page, press "Complete stage". It wouldn't be clear to the user what was left to do.

1. Save Progress button is disabled

Home | My Learning | My Team | My Appraisals | My Reports

Home > My Team > Appraisals > 2012 Appraisal > Write up stage

You are viewing Joe Blogg's appraisal

Write up Stage In progress

Back to 2012 appraisal overview

Complete by
10 August 2012

The purpose of this stage is to record all decisions and discussion from during the appraisal meeting. The appraisee should enter information for

1 Save progress | Complete Stage

- Your details
- Your views
- Post meeting
- New learning

How do you feel about the training you've received?

We've spent a fortune on training Joe, and he continues to disappoint.

Joe's answer:
It's been ok. I'd rather have more feedback.

What are your strengths?

Joe relies heavily on charm and diplomacy. His skills are limited.

Joe's answer:
I'm a great team player.

What are your weaknesses?

Joe's not very good at trigonometry.

Joe's answer:
Can't think of anything, too modest perhaps.

2 Save changes

MA07 Appraisals Overview 2nd Stage Manager Go to learner's view

You are viewing Joe Blogg's appraisal

2012 appraisal

Save PDF Snapshot Print

Preparation Stage Completed

1

Complete by
10 June 2012

The purpose of this stage is to get ready for the appraisal meeting. The appraisee should enter information for the manager to view and sign off.

2

- You have completed this stage
- Joe Bloggs has completed this stage

Meeting Stage In progress

3

Complete by
10 August 2012

This stage involves a face-to-face meeting between manager and their staff. The manager should mark this stage as complete when the meeting is over.

- You must complete this stage

Start

Write-up Stage Unavailable

Complete by
11 October 2012

This stage occurs after the meeting and allows the manager and staff member to input any actions decided in the meeting and prepare the staff member's new learning plan.

- You must complete this stage
- Joe Bloggs must complete this stage

Sign-off Stage Unavailable

Complete by
10 December 2012

Once the appraisal is complete the whole process must be signed off by the staff member's appraiser.

- Joe Blogg's appraiser must complete this stage

MA08 Appraisals 2nd Stage Overview Manager Go to learner's view

You are viewing Joe Blogg's appraisal

2012 appraisal

Save PDF Snapshot Print

Preparation Stage Completed

Complete by
10 June 2012

The purpose of this stage is to get ready for the appraisal meeting. The appraisee should enter information for the manager to view and sign off.

- You have completed this stage
- Joe Bloggs has completed this stage

Meeting Stage Completed

Complete by
10 August 2012

This stage involves a face-to-face meeting between manager and their staff. The manager should mark this stage as complete when the meeting is over.

- You have completed this stage

Write-up Stage Overdue

View

Complete by
11 October 2012

This stage occurs after the meeting and allows the manager and staff member to input any actions decided in the meeting and prepare the staff member's new learning plan.

- You have completed this stage
- Joe Bloggs must complete this stage

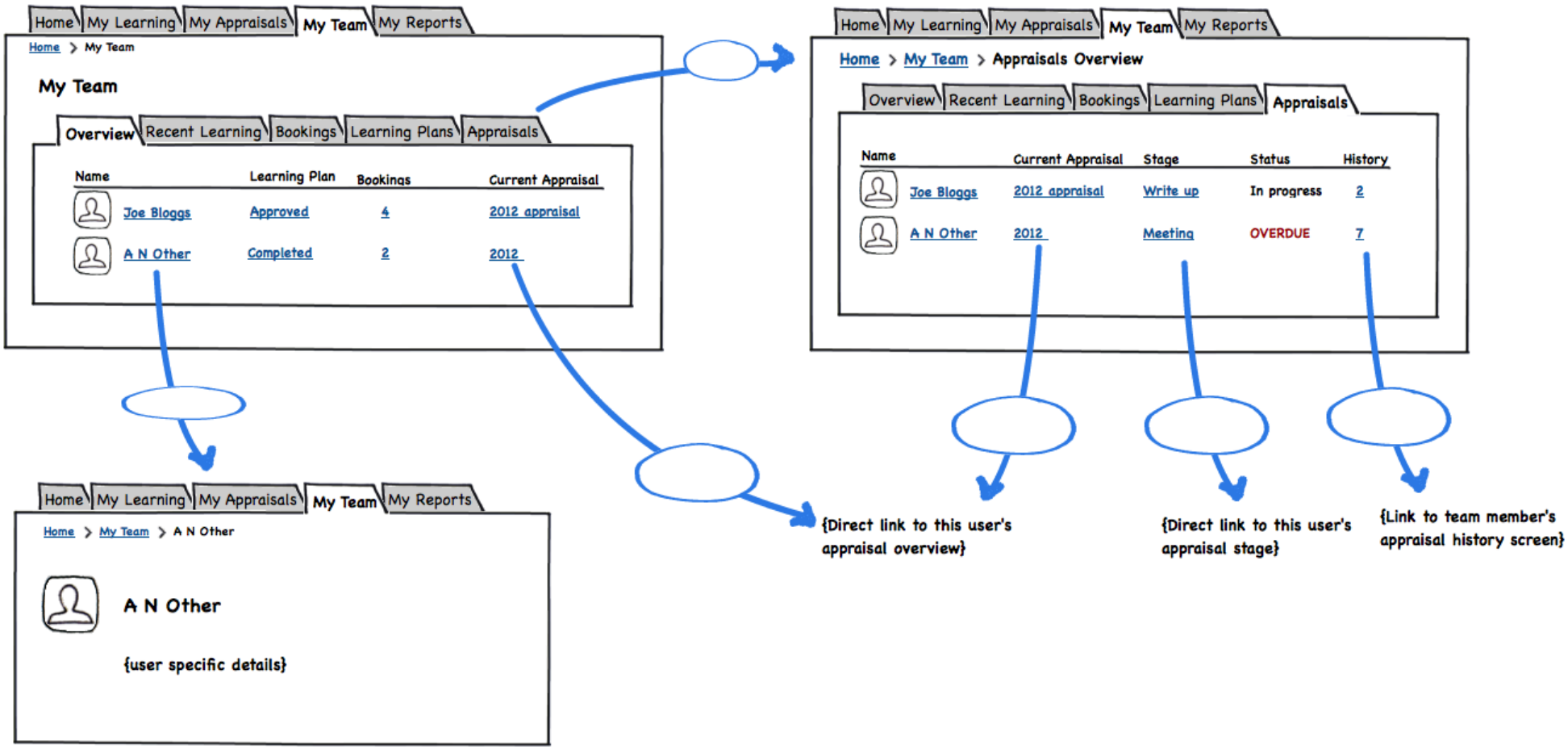
Sign-off Stage Unavailable

Complete by
10 December 2012

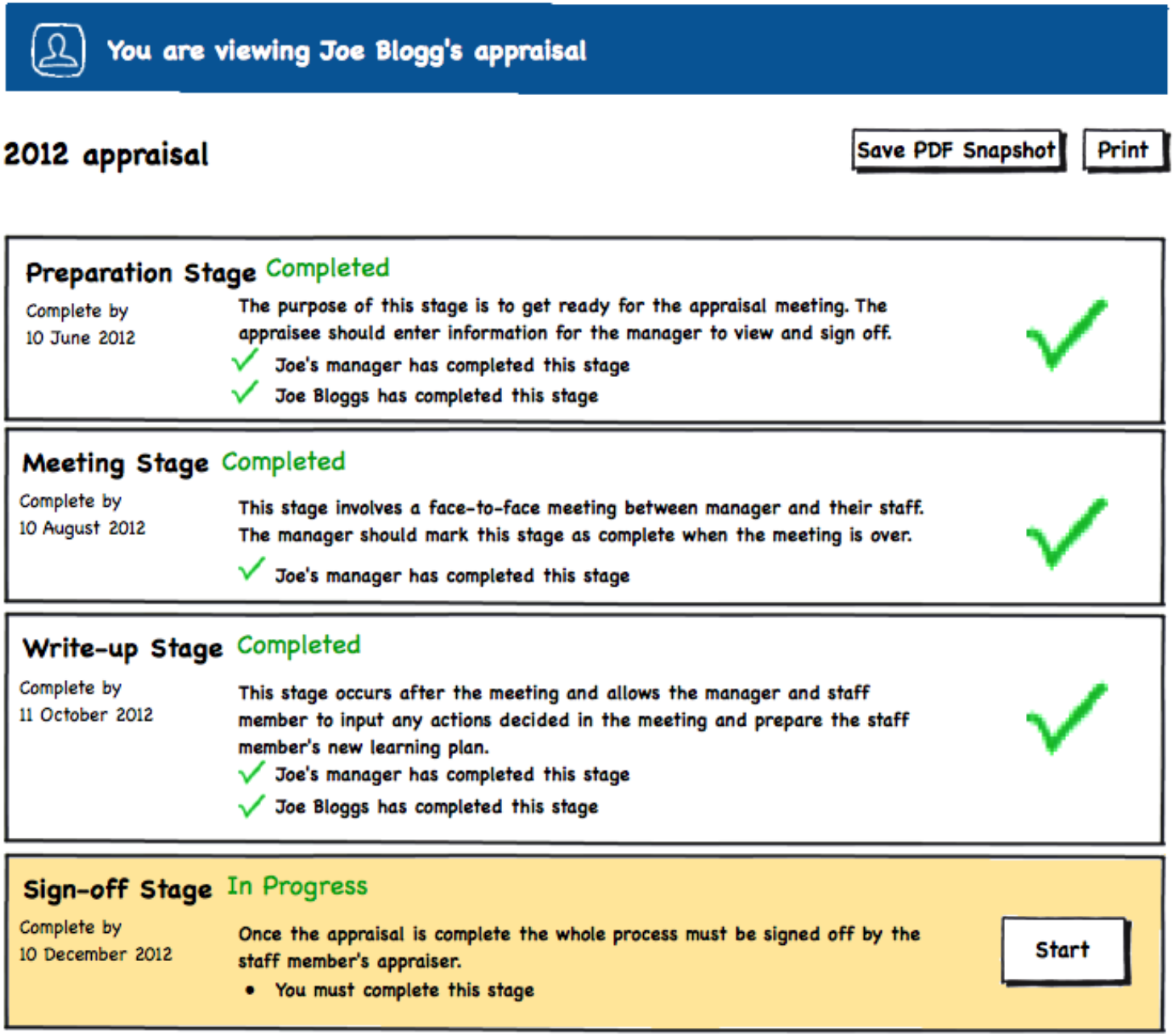
Once the appraisal is complete the whole process must be signed off by the staff member's appraiser.

- Joe Blogg's appraiser must complete this stage

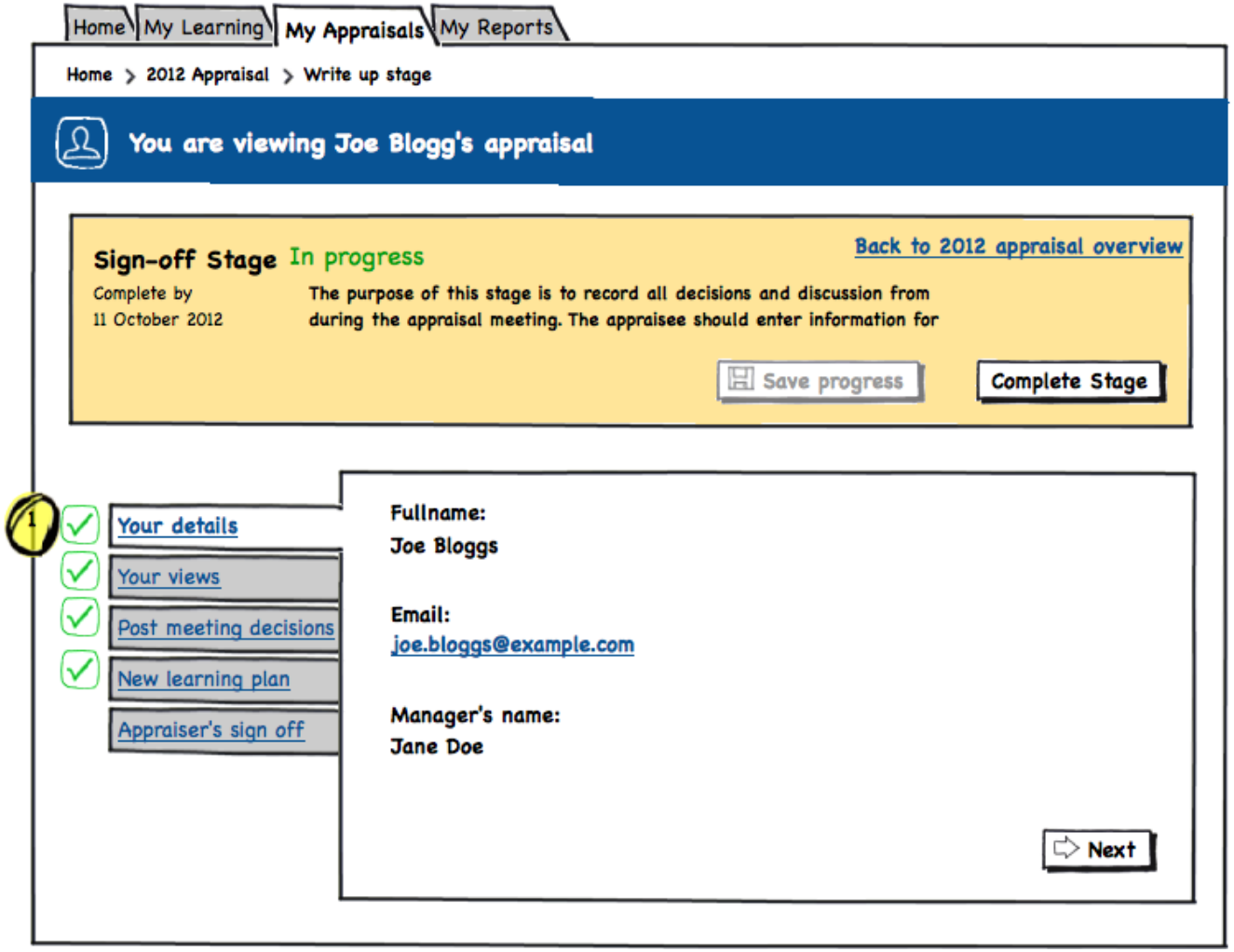
MA10 My Team


Home
My Learning
My Appraisals
My Team
My Reports
Home > My Team
My Team
Overview
Recent Learning
Bookings
Learning Plans
Appraisals
Name
Learning Plan
Bookings
Current Appraisal
Joe Bloggs
Approved
4
2012 appraisal
A N Other
Completed
2
2012
Home > My Team > Appraisals Overview
Name
Current Appraisal
Stage
Status
History
Joe Bloggs
2012 appraisal
Write up
In progress
2
A N Other
2012
Meeting
OVERDUE
7
Home > My Team > A N Other
A N Other
{user specific details}
{Direct link to this user's appraisal overview}
{Direct link to this user's appraisal stage}
{Link to team member's appraisal history screen}

AA01 Appraisal Overview Appraiser



AA06 Appraisals Final Stage, Page, Appraiser



Rules:
1. All pages from previously completed stages are available.

MA06 Appraisals 2nd Stage, Page, Manager

Home | My Learning | My Team | My Appraisals | My Reports

Home > My Team > Appraisals > 2012 Appraisal > Write up stage

You are viewing Joe Blogg's appraisal

Write up Stage In progress

Back to 2012 appraisal overview

Complete by
10 August 2012

The purpose of this stage is to record all decisions and discussion from during the appraisal meeting. The appraisee should enter information for

Save progress | Complete Stage

- Your details
- Your views
- Post meeting decisions
- New learning plan

Summary of performance for year

Joe did ok but if this team was a sinking hot air balloon and we needed to reduce ballast...

Summary of objectives for next year

Joe needs to pick up his game in teh following areas: punctuality, presentation; effort; achievement; team work; responsibility; decision-making; leadership.

Comments

Appraisee's answer:
This is expected. I have suffered from lack of direction and clear communications from my seniors.

Next

Learner View

Manager View

Appraiser View

When stage is available to the user:

Question permissions

Role	Answer	Required	View other's answers
Learner	☑	☐	☑
Manager	☑	☐	☑
Appraiser	☐	☐	☑

What are your strengths?

Manager's answer: Joe relies heavily on charm and diplomacy. His skills are limited.

What are your strengths?

Joe relies heavily on charm and diplomacy. His skills are limited.

Joe's answer: Joe has not yet responsed

What are your strengths?

Manager's answer: Joe relies heavily on charm and diplomacy. His skills are limited.

Joe's answer: Joe has not yet responded.

Question permissions

Role	Answer	Required	View other's answers
Learner	☑	☑	☐
Manager	☐	☐	☑
Appraiser	☐	☐	☐

What are your strengths? *** Required**

I'm particular good at working as part of a team.

What are your strengths?

Joe's answer: I'm particularly good at working as part of a team.

{Not displayed to this user}

When stage has been locked for the user:

Question permissions

Role	Answer	Required	View other's answers
Learner	☑	☐	☑
Manager	☑	☐	☑
Appraiser	☐	☐	☑

What are your strengths?

Manager's answer: Joe relies heavily on charm and diplomacy. His skills are limited.

What are your strengths?

Joe relies heavily on charm and diplomacy. His skills are limited.

Joe's answer: Joe has not yet responsed

What are your strengths?

Manager's answer: Joe relies heavily on charm and diplomacy. His skills are limited.

Joe's answer: Joe has not yet responded.

Question permissions

Role	Answer	Required	View other's answers
Learner	☑	☑	☐
Manager	☐	☐	☑
Appraiser	☐	☐	☐

What are your strengths? *** Required**

I'm particular good at working as part of a team.

What are your strengths?

Joe's answer: I'm particularly good at working as part of a team.

{Not displayed to this user}