

Functionality Overview Totara Perform 17

User management



Access management

- Authentication
 - Guest access
 - Custom login page
 - Self registration/with approval
 - OAuth2
 - Single sign on
 - Shared authentication
 - Password reset
 - Password policy
- Enrolment plugins
- Access rights
 - Capabilities
 - Permissions
 - Contexts
 - Overrides
- Tenant association

User account management

- Profile Information:
 - Custom fields
 - Language select
 - Timezone select
 - Position
 - Organisation
 - Job assignments
 - Manager assignment
- User accounts
 - Manual creation
 - HR Import
- Bulk upload/update
- Account suspension
- Tenant association

GDPR

- Site policy
 - Versioning
 - Multi-lingual
 - Consent records
 - HTML content
- User data management
 - Export types
 - Data export
 - Purge types
 - Data purging

Audience management

- Set audiences
- Dynamic audiences
 - Auto-updating
- Rule based membership
- Goals assignment
- Competency assignment
- Dashboard access
- Assign access rights
- Main menu items

Team management

- Team overview dashboard
- Team statistics
- Learning plans
- Alerts and tasks
- Reporting
- Performance management

Enrolment management

- Manual
- Self enrolment
- Audience based
- Program/Certification
- Learning plan
- Guest access
- Meta courses
- Seminar attendance
- Welcome message

Organisation and compliance management



Compliance management

- Programs
 - Learning pathways
 - Course based
 - Competency based
 - Conditional progress
- Notifications
 - Customised content
 - Personalised
 - Pre-scheduled
 - Multi-language
- Certifications
 - Re-certification path
 - Re-certification reminder
 - Expiry tracking
- Assigned by organisation
- Assigned by position
- Assigned by audience

Reporting

- Report builder
 - Custom reports
 - Editable embedded reports
 - Report templates
 - Graphical reports
 - Scheduled reports
 - Searchable and filterable
 - User specific content
 - Exportable
- In-built reports
 - Site logs
 - Statistics
 - Course completion
 - Course participation
 - Participation reporting
 - Performance activity reporting

Extended enterprise

- Multitenancy management
- Tenant administrators
- Tenant specific performance activities
- Tenant dashboards
- Custom main menu
- Tenant bulk upload
- Tenant themes and images
- Tenant login page
- Report content filters
- Multiple authentication methods

Hierarchies

- Organisational structures
- Positional structures
- Goal frameworks
- Competency frameworks
- Report content filtering
- Multiple job assignments
- Bulk creation and update
- Export options

Customisation



Adaptive learning

- Activity completion tracking
- Course completion tracking
- Programs & certifications
 - Course set requirements
 - And/or/then conditions
 - Custom notifications
- Activity access restrictions
 - Grade
 - Activity completion
 - User profile field
 - Group membership
 - Audience
 - Position
 - Organisation
 - Preferred language
 - Time since activity completion

Globalisation

- Language packs
 - Multiple translations
 - Customisation
 - Localisation
 - UTF-8 character sets
- Multiple timezones
- Multiple date formats
- Right-to-left display
- Customisable calendars

Design and navigation

- Themes
 - Responsive
 - Bespoke or customised
 - Site level
 - User level
 - Tenant level
- Dashboards
- Custom main menu
- Configurable user menu
- User tours
- Featured links
- Header and footer areas
- Configurable block display
- Customisable administration menu

Learner personalisation

- Alerts and tasks
- Notification preferences
- Preferred language
- Competency dashboard
- Evidence bank

Development and review



Performance management

- Performance activities
 - Custom workflows
 - Automated scheduling
 - Multiple sections
 - Multiple question types
 - Appraisals
 - Feedback
 - Check-ins
 - Aggregated questions
 - Review goals, learning, evidence and competencies
- Dynamic roles/participation
- Suspended user management
- Non-respondent management
- Centralised notifications
- Goals
 - Personal goals
 - Company goals
 - Multiple goal scales
 - Linked to position and organisation

Competency management

- Competency assignment
 - By position or organisation
 - By audience
 - Individually
 - Set proficiency by assignment
 - Continuous progress tracking
 - Competency profile
 - Identify gaps
 - Track progress
 - Review achievement paths
- Completion scales
 - Custom scales
 - Proficiency levels
- Completion criteria
- Competency types

Flexibility and power,
connecting learning
to growth

This overview highlights the key components within Totara Perform 17 and shows how its features and functionality work together to help you achieve your training and development needs.

Contact Accipio
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