

# Functionality overview Totara Perform V18

## User management



### Access management

- Authentication
  - Guest access
  - Custom login page
  - Self registration/with approval
  - OAuth 2.0
  - Single sign-on
  - Multi-factor authentication
  - SAML SSO
  - 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
- Schedule user deletion
- Tenant association

### GDPR

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

### Enrolment management

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

### 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

## Organisation and compliance management



### Compliance management

- Programs
  - Learning pathways
  - Course-based
  - Competency-based
  - Conditional progress
- Notifications
  - Customised content
  - Personalised
  - Prescheduled
  - Multi-language
- Certifications
  - Recertification path
  - Recertification 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

### Hierarchies

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

### Extended enterprise

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

## Customisation



### Adaptive learning

- Activity completion tracking
- Course completion tracking
- Programs and 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

### 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
- Improved login screen

### Globalisation

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

### 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
  - Add goals
- Dynamic roles/participation
- Suspended user management
- Non-respondent management
- Centralised notifications
- Performance overview page
- Goals
  - Integrated with performance activities
  - Progress bar
  - Set time periods
  - Goal reporting

### 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 18 and shows how its features and functionality work together to help you achieve your training and development needs.