FUNCTIONALITY OVERVIEW TOTARA PERFORM 13

totaraperform

DEVELOPMENT AND REVIEW

PERFORMANCE MANAGEMENT

- Performance activities
  - Custom workflows
  - Custom scheduling
  - Multi-stage
  - Multiple question types
  - Appraisals
  - Feedback
  - 1:1 check-ins
  - Participation reporting
  - Question level reporting
  - Related questions
  - User assigned participants
- Goals
  - Personal goals
  - Company goals
  - Multiple goal scales
  - Linked to position and organisation

COMPETENCY MANAGEMENT

- Competency assignment
  - By position or organisation
  - By audience
  - Individually (self, directly)
  - Continuous progress tracking
- Progress reporting
- Competency profile
  - Identify gaps
  - Track progress
  - Navigate to criteria
  - Self-access
- Completion scales
- Completion criteria
- Competency types

ORGANISATION AND COMPLIANCE MANAGEMENT

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
  - Activity completion
  - Course participation
  - Participation 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 user administrators
- Tenant specific performance activities
- Tenant dashboards
- Custom main menu
- Tenant bulk upload
- Tenant theming
- Report content filters
- Multiple authentication methods

USER MANAGEMENT

TEAM MANAGEMENT

- Team overview dashboard
- Team statistics
- Alerts and Tasks
- Reporting
- Performance management

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

AUDIENCE MANAGEMENT

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

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

GDPR

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

CUSTOMISATION

LEARNER PERSONALISATION

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

DESIGN AND NAVIGATION

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

GLOBALISATION

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