Functionality overview Totara Perform V19

Your LMS. Your way.

Totara's fully customisable LMS boosts compliance rates, optimises training efficiency and maximises staff retention – *at unrivalled scale.*

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This document maps out the features available in Totara Perform. You can also discover **'What's new in v19'**.

User management

Access management

- **Authentication**
  - Guest access
  - Custom login page
  - Self-registration/with approval
  - OAuth 2.0
  - SSO and shared authentication
  - SAML 2.0
  - LDAP
  - Multi-factor authentication
  - Password reset
  - Password policy
- **Configurable access rights**
  - Capabilities
  - Permissions
  - Contexts
  - Overrides
  - Tenant association
- **Diagnostic tool**

Audience management

- **Set audiences**
- **Dynamic audiences**
  - Auto-updating
  - Rule-based membership
- **Competency assignment**
- **Dashboard access**
- **Assign access rights**
- **Main menu item visibility**

User account management

- **Profile information**
  - Custom fields
  - Language select
  - Timezone select
  - Position and organisation
  - Job assignments
  - Manager assignments
- **User accounts**
  - Manual creation
  - HR system import
  - Bulk upload/update
  - Account suspension
  - Schedule user deletion
  - Tenant association
  - Configurable user profile page

Team management

- **Team overview dashboard**
- **Team statistics**
- **Alerts and tasks**
- **Team reporting**
- **Performance activity management**
- **Competency/skills overview**

GDPR

- **Site policy**
  - Versioning
  - Multi-language
  - Consent reports
  - HTML content
- **User data management**
  - Data export
  - Data purging
- **Scheduled user deletion**

Organisation and compliance management

Reporting

- **Customisable reports**
  - Editable embedded reports
  - Report templates
  - Graphical reports
  - Scheduled reports
  - Searchable and filterable
  - User-specific content
  - Exportable
- **Performance activity reporting**
  - Participation reports
  - Response reports

- **Goals reporting**
  - Progress reporting
  - Status reports
- **Evidence reporting**
  - Search evidence
  - Evidence per user
- **Competency/skills reporting**
  - Assignments
  - Status reports
  - Competencies/skills held
- **IntelliBoard integration**

Hierarchies

- **Multiple organisational structures**
- **Multiple positional structures**
- **Competency frameworks**
- **Automated learning plan content**
- **Multiple job assignments**
- **Multiple managers**
- **Bulk creation and update**
- **Update via HRM system**
- **Export options**

Extended enterprise

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

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Customisation

Design and navigation

- **Branding/theme**
  - Device responsive
  - Bespoke or customised
  - Site level
  - User level
  - Tenant level
- **Dashboards**
- **Customisable 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**
- **Performance activities dashboard**
- **Personal goals**

Globalisation

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

Development and review

Performance management

- **Performance activities**
  - Build custom workflows
  - Create multiple sections
  - Multiple question types
  - Aggregated questions
  - Create appraisals
  - Build feedback forms
  - Schedule check-ins
  - Review goals, learning, evidence and competencies
  - Select participants
  - Dynamic roles/participation
  - Suspended user management
  - Non-respondent management

- **Goal management**
  - Progress tracker
  - Comments
  - Tasks
  - Linked courses
- **External learning evidence**
  - Add and upload evidence
  - Set allowed evidence types
- **Notifications**
  - Customised content
  - Personalised
  - Prescheduled
  - Multi-language

Competency and skills management

- **Assign by position or organisation**
- **Assign by audience**
- **Individually assigned**
- **Customise proficiency requirements**
- **Set achievement paths**
- **Specify completion criteria**
- **Create competency types**
- **Continuous progress tracking**
- **Competency/skills dashboard**
- **Identify an individual's skill gaps**

Flexibility and power, connecting learning to growth

Perform

This overview highlights the key components within Totara Perform 19 and shows how its features and functionality work together to help you achieve your training and development needs.