

# Totara Perform Functionality Overview - Version 20



Trusted for mission-critical learning

## 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**

### GDPR

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

### 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
  - Tenant association
  - Configurable user profile page

### Audience management

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

### Team management

- **Team overview dashboard**
- **Team statistics**
- **Alerts and tasks**
- **Team reporting**
- **Performance activity management**
- **Skills overview**

## 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
- **Skills reporting**
  - Assignments
  - Status reports
  - Skills held
  - Skill proficiency

### Hierarchies

- **Multiple organisational structures**
- **Multiple positional structures**
- **Skills frameworks**
- **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**

## 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**

### 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**
- **Skills dashboard**
- **Performance activities dashboard**
- **Personal goals**
- **AI-assisted SMART goals**

## 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 skills
  - 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

### Skills management

- **Assign by position or organisation**
- **Assign by audience**
- **Individually assigned**
- **Customise proficiency requirements**
- **Assign audience to allow peer skills rating**
- **Set achievement paths**
- **Specify completion criteria**
- **Create skill types**
- **Continuous progress tracking**
- **Skills dashboard**
- **Identify skill gaps**

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