

TOTARA: SETTING UP AN EXTENDED ENTERPRISE MODEL WITH TOTARA

*This is a transcript of a video
on the Totara Academy*



WHEN SETTING UP YOUR EXTENDED ENTERPRISE SOLUTION YOU'LL LIKELY WANT YOUR DIFFERENT STAKEHOLDERS SUCH AS YOUR PARTNERS, CUSTOMERS OR OTHER GROUPS OF USERS TO ACCESS DIFFERENT LEARNING AND PERFORMANCE MANAGEMENT ACTIVITIES ON YOUR TOTARA PLATFORM.

To do this effectively you'll need to segment and manage groups of users.

There's lots of things you'll probably need to do such as devolve user management to people within a partner organisation or give a franchise the ability to develop their own training and performance management processes just for their staff.

Whatever your need, Totara has many features that can help you to achieve this segmentation of content, permissions and users in your platform.

In this video we'll take a high-level look at some of the features you can use to set up an extended enterprise model. If you'd like to go further and start using these features on your platform then there is more extensive training available to help you to do that.

Specifically, in this video we'll take a high-level look at multitenancy, organisational hierarchies and audiences.

Let's start by looking at multitenancy. What do we mean by this?

Multitenancy is when you have a single, shared instance of Totara that serves multiple groups of users such as your customers or partners.

A tenant has its own users, learning content such as courses, programs and certifications. It also has its own performance activities such as appraisals and check-ins, as well as other features such as workspaces.

A tenant can also have its own dashboard and set audience. And because it's multitenancy, you can have multiple tenants which is ideal for separate stakeholders or user groups.

Setting up a multitenanted platform can be really helpful if you need to keep data and users completely separate from each other. You can decide whether tenants see only their own tenant-based content or a combination of their tenant content and site-level content such as any information from your headquarters.

By using multitenancy you could set up the platform in one way for your partners with specific theming and training and then in quite a different way for your customers or any set of users that you have in the system.

So, that's multitenancy in a nutshell. But what other features are available to you?

Let's reflect on another way to separate and target learning and performance activities.

One of the main methods to start doing this in Totara is by building organisation and position hierarchies.

Hierarchies are used to map out the structure of your organisations, such as regions, offices or departments and your positions, such as the types of roles people do. Hierarchies are the structure of **what** people do and **where** they do it.



The content someone needs to access is often dependent on a person's role, sub-organisation, or geographical location especially within an extended enterprise model. Knowing and mapping this information in the system allows you to automate which learning or performance management activities someone is shown when they log into the system.

You can have multiple hierarchies, which each need their own framework.

For example, you might set up one framework for internal staff and another for customers if you offer training to both. When you have two frameworks, you can provide separate reporting to the users within each framework, so they only see information relevant to them.

Once you've set up your hierarchies in the system, you can then set up dynamic audiences with a rule to group all the users from a specific organisation in the same place.

Audiences allow you to do things in the platform such as automatically add new users to the appropriate audience for their position, enrol them in the related mandatory training, assign them relevant competencies and assign check-ins and appraisals with their manager.

In a dynamic audience, membership is based on a set of rules. If a user in the system meets the criteria, they are automatically added to the audience.

For example, an audience could be made up of users who are from a specific organisation, such as your partner resellers. You can then use that dynamic audience to only show information to your partners and not to other groups of users like your customers.

In this video, we've taken a very high-level look at some of the features you can use to start setting up your extended enterprise solution. If you'd like to learn more about anything mentioned in this video there is specific detailed training available to help you.

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