TOTARA:

COMPLIANCE IN TOTARA

This is a transcript of a video on the Totara Academy

IN THIS VIDEO, YOU'LL EXPLORE A COMPLIANCE JOURNEY FROM THE PERSPECTIVE OF A MEMBER OF STAFF, NAMED FEE, AND HER MANAGER, MARK, IN TOTARA.

Fee is quite new to the organisation, and despite having taken IT Security training in the past, she was recently caught out by a fake phishing email sent by the IT Security team. Having clicked on the link, Fee was immediately taken to this course to update her skills in this area.

She can see from the information at the top that she's now required to complete the course. After reading a bit of information, she's pleased to see that she just needs to pass a quiz, so she gets started there.

Unfortunately for Fee, she fails to pass the quiz. As this course uses an adaptive design, she is now shown further learning which she must complete before she can take a quiz again.

And to add to the pressure, she can see that her Manager Mark is top of the leader board!

If Fee wants support while completing the course, or at anytime afterwards, she's also a member of the IT Security workspace.

The IT Security team posted in the workspace after the phishing email was sent out and Fee did own up to being one of the people who clicked on the link.

She can also use this workspace to access additional resources at any time.

Fee and Mark also have their own workspace to keep track of ongoing conversations around Fee's progress.

Fee has posted here about the phishing email to let Mark know she's taking the course.

Mark has also used the workspace to remind Fee that she's overdue on her Health and Safety certification.

Fee uses the workspace to let Mark know that she's working on it because she received both course and certification reminder emails and then uses the workspace again later, to let him know she's done it. She provides a screenshot to confirm but Mark lets her know she doesn't need to do that because he is automatically notified that she is certified and has access to a RAG report showing his team's certifications.

Fee will be notified when she next needs to complete her Health and Safety certification, and she can also check at any time by visiting the certification page.

Here she can see that she is currently certified.

She can also see that now she has completed the **Original certification path** next time she can take the **Recertification path** which she's relieved to see is a refresher rather than taking the full course again.

Fee can also use the Health and Safety workspace at any time for information.

Here she can see that their Director has shared the team's recent health and safety statistics, and Fee's Manager has shared a recent risk assessment with the Director in response.

There is also space in the workspace for anyone to report an issue. One of Fee's colleagues has posted about a leak which needs addressing.

She can also see discussions around mental wellbeing and the organisation's strategy and information on the five most common health and safety hazards in an office environment.

And because Fee is receiving notifications from this workspace, whenever someone starts a new discussion, she'll be amongst the first to hear about it.

One month after completing her recent course on phishing, Fee is pleased to receive a nudge notification reminding her of some of the key points in the course.

She doesn't know it yet, but she'll receive another one in a further two months to ensure that IT Security stays at the front of her mind.

We know that Fee's Manager Mark has also completed the Phishing course, so let's have a look at how that appears to him.

I'm now logged in as Mark, and on his profile he can see his Anti-Phishing badge has been awarded. He can also use this badge in an external backpack if he wants to.

Also on his profile, Mark (like all users) has access to his **Competency profile**.

Here he can monitor his own proficiency in compliance and other areas he's assigned.

As Fee's manager, he can also see her competency profile via the **Team** menu option.

As Fee is relatively new, she's still working through her new starter competencies, which include some compliance areas.

As a Manager, Mark also has access to the relevant reports for his team such as the **Learner certification completion status overview report**.

Here he can see at a glance the status of his team's certifications. And of course, this same report is available at an organisation-level to senior managers too.

If Mark wants to discuss compliance with any of his team, he can do so informally in their shared workspaces as he has done with Fee, or for more formal conversations these can be tracked via performance activities such as check-ins too.

So those are just some of the ways that Totara can support your compliance programme – from individuals to top-level reporting. How might you manage compliance better, with Totara?

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