

User administration

Totara allows you to manage your users in a number of ways, organising them into audiences and groups, designating roles that give users specific and customisable sets of permissions, and keeping user information up to date.

This quick-start guide will help you to set up your users to ensure that they have access to the functionality and content that they need.

Adding your users

Once you have configured your site you can start to add users. You can either add users manually or in bulk, depending on your requirement. If you only need to add a small number of users, you can enter their details and [set up their accounts manually](#). If you have a large number of users to add, manually creating accounts is impractical. You can [upload user data](#) from a file to create new users or update existing users.

If you also want to upload [organisation](#), [position](#), [job assignment](#) and [competency](#) information for your users, you can use [HR import](#) to import your user information from a database or CSV. Before [running HR import](#), it is important to check the [default settings](#) for HR import, and configure [elements](#) and [sources](#) to ensure that your import runs smoothly.

Alternatively, you may want users to be able to set up their own accounts. If you want learners to self-register or use single sign-on, you can use a range of [user authentication](#) methods.

You can also add [custom user profile fields](#) to your users' profiles, allowing you to capture any additional information that you require.

User policies

You may need to alter the default [user policies](#) information. Site Administrators can configure your site's user policy settings to determine which roles are automatically assigned to different users, and the information that various users are able to see.

Assigning roles

[Roles](#) are a combination of capabilities and permissions that allow users to complete different actions in different parts of the site. For example, you may assign the role of Site Administrator to a handful of trusted users, allowing them to configure the site's settings, set up audiences, change the way the site appears, and more. Alternatively, you may want to assign your trainers the role of Editing Trainer, allowing them to control almost everything about their courses, but preventing them from altering site-wide settings.

You can also add new roles and edit existing roles, changing the permissions to suit your exact requirements.



Think carefully about which permissions you want to give to your users. For example, you don't want too many people to change site-wide settings or have access to sensitive data, so you should assign roles such as Site Administrator or Site Manager sparingly.

Groups and audiences

Once you have added your users to the system, you can classify them into groups and audiences. For example, you may wish to create a group for each new batch of Learners, so that learners can only access content assigned to their group. You can either manually classify your Learners into groups, or automatically generate groups. For example, if you wanted to divide users into smaller groups for a forum activity in order to encourage participation, you could automatically generate groups of twenty users based on their last names, taken from their profiles.

Alternatively, you can use [audiences](#) to group your learners based on shared learning requirements, geographical location, or any other criteria. While groups are used at the course or activity level, audiences can be set up globally. For smaller audiences that you don't expect to change often, you can manually create set audiences. For large or continually changing groups, you can set up dynamic audiences, in which learners are automatically added or removed depending on the audience's definition. Additionally, you can [upload existing audiences](#) from a CSV file, allowing you to quickly set up your learner audiences so you can start assigning learning right away.

Job assignments and teams

Alongside their roles in Totara (such as Learners, Staff Managers or Editing Trainers), the people within your organisation may have many different job titles and responsibilities. These can be reflected in the system by using [job assignments](#). Within Totara job assignments allow you to create job roles and assign managers to those job assignments. For example, one user might manage a team of designers, but also be a first-aider reporting to the organisation's Health and Safety Officer. In this case, they could be set up with job assignments to ensure that they can access the appropriate training for both of their roles. You can [manage job assignments](#) using HR import, or manually on a user's profile.

With job assignments set up, managers are able to view their team, allowing them to view learning plans, appraisals, and more.