User Accounts

It is possible for a Site Administrator to create, edit, view, manage, and/or delete user accounts within the Totara Learn system.

(This video is taken from the Creating users in Totara Learn course in the Totara Academy, where you can access more resources and learning materials - including other videos).

Create a user

1. Click *Users* > *Accounts* from the **Site administration** menu.
2. Click **Add a new user**
3. Complete the compulsory fields (marks with an asterisk).
4. Click **Expand all** from the top-right hand side of the page to view all available fields for the user profile.
5. Click **Create user** to save the new user's profile.

You can also add new users via HR import or 3rd party integrations.

> Note that enabling the **Generate password and notify user** setting when creating user accounts will cause an email to be sent to the users.

View user accounts

A Site Administrator or role with the appropriate permissions can view user accounts.

1. Click *Users* > *Accounts* from the **Site administration** menu.
2. Click **Browse list of users**.

This list of users is generated as an embedded report via Totara Learn's report builder functionality. This means that they have all the features of a report generated via report builder, such as the ability to add additional columns and export result as a CSV file. The **Browse list of users** report is based on the user source in report builder.

You can also filter by a number of different criteria, including the **User status** which is s dropdown list that allows you to choose from active, deleted, suspended, and unconfirmed (the latter option referring to users who have self-registered but not yet confirmed their accounts).

> MNET is not supported in the report, if you need to access this functionality change the **Use legacy Browse List of Users report** setting which can be found under *Site Administration* > *Developer* > *Experimental* > *Experimental settings*.

View a user's profile

A Site Administrator or role with the appropriate permissions can view a user's profile.

1. Click *Users* > *Accounts* from the **Site administration** menu.
2. Click **Browse list of users**.
3. Search for and find the user.
4. Click the user's name to view their profile.

Delete a user account

A Site Administrator or role with the appropriate permissions can delete a user's account.

1. Click *Users* > *Accounts* from the **Site administration** menu.
2. Click **Browse list of users**.
3. Search for and find the user.
4. Click the delete icon ( ) next to the user's name to open their account.
5. You will be prompted to confirm deletion of the user account.
6. Click **Delete** to confirm user deletion or **Cancel** if you change your mind.

Once you have deleted a user they will have a **deleted** user status and be counted for any deleted user purge types you might run. See User data management for more information.

On this page

Related pages

The Totara Academy has a whole course dedicated to Creating users in Totara Learn. Here you can learn more on how to add users, see best practice, and give it a go yourself.

The Totara Academy has a whole course dedicated to User data management in Totara Learn. Here you can learn more on how to use the user data management tools, see best practice, and give it a go yourself.

All associated data, including but not limited to the following, will be deleted and is not recoverable:

- Appraisals where the user is in the learner role
- Grades
- Tags
- Roles
- Preferences
- User custom fields
- Private keys
- Customised pages
- Seminar signups
- 360 feedback assignments and responses
- Position assignments
- Programs & certifications
- Goals
- Will be unenrolled from courses
- Will be unassigned from manager, appraiser and temporary manager positions
- Will be removed from audience
- Will be removed from groups
- Messages will be marked as read

If you wish to retain any data you may wish to consider suspending the user instead.

Suspend/unsuspend a user account

A Site Administrator or role with the appropriate permissions can suspend/unsuspend a user's account.

To suspend a user's account:

1. Click *Users* > *Accounts* from the **Site administration** menu.
2. Click **Browse list of users**.
3. Search for and find the user.
4. Click the suspend icon ( ) next to the user's name to suspend the user's account.

Follow the steps above to unsuspend a users account, this time the eye icon will go from closed to open.

Once you have suspended a user then they will have a **suspended** user status and be counted for any suspended user purge types you might run. See User data management for more information.

User data

By clicking the user data icon ( ) you can view a summary report on all of a users data within the system. There is also a button to **Audit user data** which provides a fuller list of details held about the user on the system. Additionally you can run a manual data purge or update the automatic purge types for a user.

Manual data purging

Manual data purges are useful if you wish to purge the data of a particular user or an active user.

Before running a manual purge you will need to have set up at least one manual purge type (you can see how to do this on the User data management page). Then follow these steps:

1. Go to *Users* > *Accounts* from the **Site administration menu** and click **Browse list of users**.
2. Search or find the user you wish to purge, then click the user data icon ( ) alongside their name.
3. Next click **Select purge type**.
4. Select from the dropdown list the **Purge type** you wish to run.
5. Finally click **Purge user data** to run that purge.

Update automatic purge types

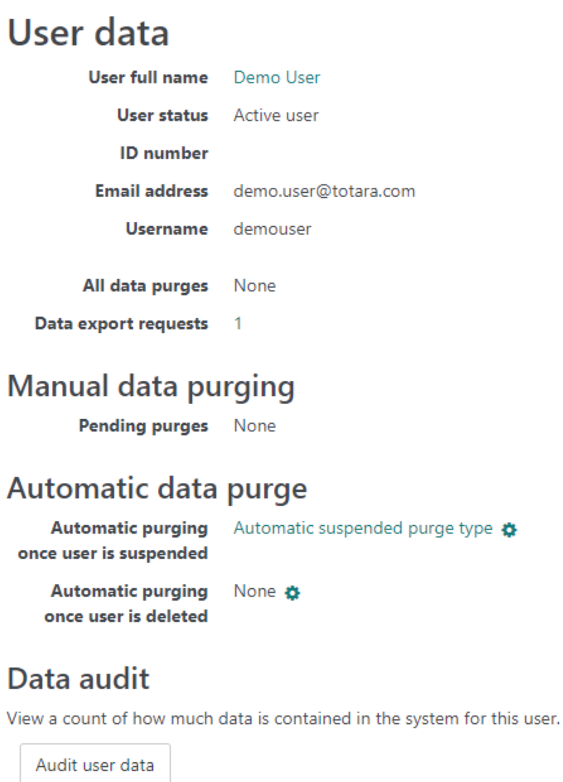
After clicking to view the **User data** you can update the automatic purge types set for that user. You will first need to have set up at least one automatic purge type (you can see how to do this on the User data management page). Then follow these steps:

1. Alongside the automatic purge type you wish to update click the edit icon ( ).
2. From the dropdown list choose the corresponding purge type you wish to set.
3. Then click the **Update** button.

4. You will now be presented with a summary of the data to be purged.
5. Finally click the **Save changes** button.

You can also set automatic purge types via bulk action.

> If you do not set up automatic purging once user is deleted or the default purging type for deleted users then the purge type won't be applied when the user is deleted (either individually or via a bulk action).



Edit a user's profile

A Site Administrator or role with the appropriate permissions can edit a user's profile.

1. Click *Users* > *Accounts* from the **Site administration** menu.
2. Click **Browse list of users**.
3. Search for and find the user.
4. Click the edit icon next to the user's name to open their profile.
5. The fields here are self evident; the most frequent reason to access this page is to re-set a user's password.
6. Click **Update profile** to save changes.

Log in as a user

A Site Administrator or an individual with an appropriate role and associated permissions can **Log in as** another (non-administrative) user. Logging in as a user will allow the administrator to view the site as this individual and complete various actions across the site. The **Login in as** functionality is primarily designed for troubleshooting access and technical issues, but may also be used for testing purposes or to assist a user who is having difficulty with a specific task or action within the site.

To **Log in as** another user:

1. Go to *Users* > *Accounts* from the **Site administration** menu.
2. Click **Browse list of users**.
3. Search for and find the user.
4. Select the user's name to open their profile
5. Under the *Administration* section, select **Log in as**
6. Complete the required actions and select **Log out** from the User Menu to end the session

For security reasons, you will be required to log back as yourself, following a **Log in as** session.

> Actions carried out while logged in as another user will be logged against the individual's activity and identified as being completed by the administrator during a logged in as session.

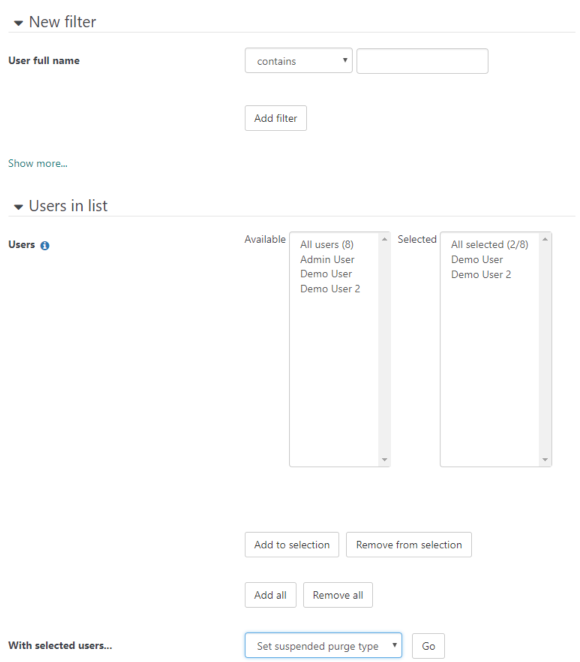
Bulk user actions

The bulk user actions feature in *Administration > Site administration > Users > Accounts > Bulk user actions* enables administrators to select users by creating a filter and then perform any of the following actions:

- **Confirm:** Confirm user accounts created through Email-based self-registration which are not yet confirmed by the user
- **Send a message** (requires Messaging to be enabled)
- **Delete:** Delete user accounts
- **Display on page:** Display a list of users on a page
- **Download:** Download user data in text, ODS or Excel file format
- **Force password change:** Force users to change their passwords
- **Add to audience:** Add users to a particular audience
- **Toggle HR import:** Enable or disable HR import for the selected users
- **Set suspended purge type:** Set the automatic purge type for then the user is suspended
- **Set deleted purge type:** Set the automatic purge type for then the user is deleted

To perform a bulk user action:

1. If you know them, choose your users from the available list or else click **Show Advanced** to create a filter.
2. Users can be filtered according to full name, surname, first name, email address, city/town, country, confirmed, first access, last access, last login, username, authentication.
3. If you have set a custom profile field, this is available too from the **Profile** dropdown box
4. Select users from the list.
5. Choose an action from the dropdown menu.
6. Click the **Add filter** button.
7. Select in the box on the left those users you require and move them to the box on the right.
8. From the dropdown box **With selected users**, choose the action you wish to perform and then click **Go**.



Upload user pictures

It is possible to bulk upload user profile pictures in a ZIP file.

Before uploading, you will need to ensure that the image files are named so that they correspond to one of the following user attributes: username, idnumber, id.

For example, if you wanted to use the username attribute then the file for a user with the username user1234 would be named user1234.jpg (with .jpg being the file extension, although you can use other file types).

To bulk upload user profile pictures, just follow these steps:

1. From the **Administration** block go to *Site administration* > *Users* > *Accounts* > *Upload user pictures*.
2. Upload your ZIP folder using the File picker.
3. Select the attribute you wish to use to match the files to the users.
4. Decide if you want to override existing user pictures or not.
5. Click the **Upload user pictures** button.

Once successfully uploaded you will get a confirmation message on the screen.

Active users

This is normally considered to be a user that has logged into the site over the period of the Totara subscription (usually a year).

To display the number of active users for the last twelve months:

1. From **Administration** menu go to *Site Administration* > *Notifications.*
2. In the Notification panel there will be a message saying **X users have logged in to this site in the last year**, where X is the number of users.

To display the number of active users for a specified period:

1. From the **Administration block** go to *Site Administration* > *Users* > *Accounts* > *Browser a list of users*.
2. Click **Show more** under New filter.
3. Select the date in **is after** in the **Last access** field.
4. Select **Add filter**.