

Site policies

What was previously **Site policies** is now **Security settings**.

The Site policies functionality allows you to create and manage multiple site policies, including different versions and translations, all of which can require consent by the user.

This functionality needs to be enabled by going to *Site administration > Advanced features* and checking the **Enable site policies** option. This causes the link for site policies to appear under the **Security** menu.

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In order to facilitate GDPR compliance and also facilitate organisations with multiple site policy needs it is possible for site admins to create, edit, review, and delete site policies for their Totara Learn site. Each site policy can have one or more consent related user confirmations which may or may not be required. If enabled, users will be required to view and consent to any current site policies that they have not viewed and consented to before. If the user doesn't accept all required terms and conditions they will be logged out.

Site policies

Create new policy		
Name	Revisions	Status
Example policy	0 1 new version (draft)	Draft

Create site policy

First of all you will need to go to *Site administration > Advanced features* and ensure that **Enable site policy** is checked. Then follow these steps:

1. Go to *Site administration > Security > Site policies > Manage policies*.
2. Click the **Create new policy** button.
3. Enter in the desired [settings](#) to configure the policy to your preferences.
4. Click **Save changes** to add the new site policy.

Site policy settings

Setting	Description	Notes
Primary language	You can have site policies in many different languages. Once you have translations, the primary language will indicate which one would be displayed by default.	-
Title	This is the title of your site policy, it should be something descriptive and short so you can easily tell what it is about.	-
Policy statement	This is your policy statement, so it will set out any terms and conditions or other policies you wish users to consent to.	-
Consent statement	A consent statement can be used to confirm that a user has read the site policy and agrees to any terms and conditions with it, you might also have additional consent statements to confirm they agree with specific actions or responsibilities.	-
Provide consent label	You can determine the wording used to consent, for example 'Agree', 'I agree', or 'I consent'.	-

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Related pages



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.


Withhold consent label	You can determine the wording used to withhold consent, for example 'Disagree', 'I don't agree', or 'I do not consent'.	-
Consent required to use this site	<p>You can check this option if agreement with the consent statement is required to access the site. If the user declines the consent statement they will be logged out.</p> <p>The user will see a warning message if they decline required consent to alert them that they will be logged out if they do not consent. They can then click one of two buttons, either Go back to policy where they can decide to consent, or Log me out if they still do not wish to consent.</p>	-

If you need to add additional consent statements then you can do this by clicking the **Add statement** button.

When you are finished be sure to click **Save** to ensure you confirm all changes.

Managing site policy

Once you have created a new policy you can click on it (click on the name of the policy) to manage that policy.


When you have an unpublished version of a site policy you will see a **Continue editing new version** button where you can make changes. This functions the same as the edit icon () in the **Action** column.

Manage "Example policy" policy

Version	Status	# Translations	Date published	Date archived	Actions
1	Draft	1 View	-	-	 

Once this version has been published you will be able to create additional versions by clicking the **Create new version** button.

Manage "Example policy" policy

Version	Status	# Translations	Date published	Date archived	Actions
1	Published	1 View	Thursday, 1 March 2016, 11:21 AM	-	

When creating a new version it is also possible to add notes in the **What's changed** section to show what is different from the previous version.

Consent statement

Consent statement*

Provide consent label*

Withhold consent label*

Consent required to use this site

▼ What's changed

Changes since previous published version

Once you have multiple versions then you can manage these using the **Actions** column. From here you can:

- Publish ()
- Edit ()
- Delete ()
- Archive ()

When publishing, deleting, or archiving a version there is a confirmation statement to ensure you understand what is going to happen and any possible consequences. Once a version is archived or published it cannot be edited and neither can any of its translations.

Translations

You can have multiple translations of your site policy, which is helpful if you are working either in multiple languages or countries as well as if you are working with people who may not have English as their first language. Allowing a site policy to be presented in a user's chosen language means that they have a better chance of understanding it.

To create a new translation follow these steps:

1. From the **Site policy** top level page, click the name of the policy you wish to create a translation for (in the same way you do to create a new version).
2. In the **Translations** column click **View** alongside the version you wish to create a translation for.
3. From the **Add translation** dropdown list select the language you wish to translate to. You will only see **languages that have been activated** on your site.
4. You will then see the same settings as when creating the initial version, where you can enter your translation. You will also see a locked version of the original policy, so that this can help you in translating it correctly.
5. You can note what has changed in the **What's changed** section (for example if you have slightly changed the wording to make it flow better in the translation).
6. When you are finished click **Save**.

Translate "Example policy" to Spanish; Castilian

There are required fields in this form marked *

Example policy

Title *

Política de ejemplo

This is the example policy statement.



Policy statement *

Esta es una declaración de política de ejemplo.

Consent statement

Consent statement *

I have read and understood the policy.
He leído y entendido la política.


You can edit () any language version (including the primary language) but in the translation screen you can only delete () the translated versions (not the primary language version).

When you are done you can click the **Back to all versions** link to publish this version if you are happy with it.

Manage "Example policy" translations

[Back to all versions](#)

[Add translation](#)

Language	Status	Options
English (primary)	Complete	DF
Spanish, Castilian	Complete	DF 

Consenting or declining a site policy

When a user next logs in they will be presented with any new or changed site policies for them to decide whether or not to consent. Remember that if consent is required and they do not consent they will be logged out. Users can select from the dropdown menu which language they would like to view the policy in (if translations are available) and the primary language will be displayed by default.

1 of 1 policies

Example policy

This is the example policy statement.

English (en) ▾

English (en) ▾

Español - Internacional (es) ▾

Provide your consent

There are required fields in this form marked *

I have read and understood the policy.* I agree. I don't agree.

Site policy consents

From their profile any user (including learners) can access **Site policy consents** in the **Administration** section of their profile. This allows them to see how they have responded to any consent statements, including those where consent is not required.

Users can also change their decisions and re-consent. If they remove their consent from a required consent statement (that they had previously consented to) then they will be logged out.

Site policy consents

Policy	Version	Language	Statement	Response	Date consented
Example policy	2	English	I have read and understood the policy.	I agree.	Thursday, 1 March 2018, 1:11 PM

You can also view a report of all site policy consents under *Site administration > Security > Site policies > User consent report*.

Site policy record report

There is a new embedded report source which allows you to see a report of all your site policy documents. You can read more about embedded reports on the [report builder](#) page.

User Consents: 1 record shown

Search by

Current Version (Primary Policy)

Example policy

User's Fullname	Policy Title	Version Number	Consent Statement	Response	Consented (Yes/No)	Language consented in	Date Consented
Demo User 2	Example policy	2	I have read and understood the policy.	I agree.	Yes	English	1 Mar 2018 at 13:11

Export as

HTML editor

It is possible to use an HTML editor when adding or editing site policy statements and translations. This allows for better formatted statements to make policies clear and easy to understand. You can also preview the policy to see how it will be rendered to users.

If you are upgrading from an earlier version of Totara Learn 11 and have previously added one or more site policies you will not automatically be able to use HTML formatting on those existing policies. Instead you will need to do the following:

1. Edit the policy text.
2. The text will still be displayed in a text editor, but you will have an option to change the entered format.
3. Make sure you have a copy of the current text somewhere (copy and paste it outside of Totara Learn).
4. Change the format to **HTML format**.
5. Then you can either:
 - Save and re-open the policy.
 - Preview and click **Continue editing**.
6. The policy text will be shown in the HTML editor but will most likely contain no formatting.
7. Replace the current (unformatted) text by pasting back in the copy of the original text.

8. Save the changes.