

# user data management

It is important that your organisation and the software you are using complies to local data protection regulations, including GDPR (General Data Protection Regulation, an EU law enforced from 25 May 2018) You can read more about GDPR and Totara Learn in our [policy documents](#). Whether or not your business is operating out of the EU Totara Learn will allow you to implement and operate robust data policies within your organisation.

To help facilitate the access to and removal of data Totara Learn has two configurable features, export types and purge types. Export types allow you to configure what data should be exported, whereas purge types allow you to configure for the removal of data. Purging is different from the standard deletion process (e.g. clicking **Delete user** on a users profile) as it allows more control over what data is removed. You can find out more about both purge types and export types below, as well as in the [developer documentation](#).

(The video above is taken from the [User data management](#) course in Totara Academy).

## Settings

You can configure the user data management settings to best meet the needs of your organisation. Once you have set your preferences don't forget to click the **Save changes** button.

Setting	Description	Notes
<b>Default Suspend ed User automatic purge type</b>	Choose which purge type will be used by default when a user is set to the <b>Suspended</b> user status but has no purge type set on their individual account.	If no default is set, users who don't have a purge type set will not have any data purged when they are assigned the relevant user status.
<b>Default Deleted User automatic purge type</b>	Choose which purge type will be used by default when a user is set to the <b>Deleted</b> user status but has no purge type set on their individual account.	If no default is set, users who don't have a purge type set will not have any data purged when they are assigned the relevant user status, however the standard delete behaviour still occurs. When the <b>Deleted</b> status is applied to a user this begins a process where the user's login ability is suspended, a subset of user data is deleted, and the account is flagged with the <b>Deleted</b> user status. In this state, they are hidden from view (the account no longer has a user profile page and does not appear in <b>Browse list of users</b> ). This does not, however, delete all user data from the system.
<b>Allow users to export their own data</b>	Tick the box to allow users to export their own data. Which data is exported is defined when you set up an export type that permits own data export.	Before a user can export their own data you must enable this setting and also: <ul style="list-style-type: none"><li>▪ Edit the <a href="#">desired role</a> (if you do this with <b>Authenticated user</b> it will apply to everyone) to set the <code>totara/userdata:exportself</code> capability to <b>Allow</b>.</li><li>▪ Go to <i>Site administration &gt; User &gt; User data management &gt; Settings</i> and enable the <b>Allow users to export their own data</b> option.</li></ul>

## Export types

You can create and manage different export types to decide which contain a list of data items that will be exported when a user requests an export of their own data, and an export task is run to produce a file containing this data.

It is useful to create an export type if:

- Your organisation needs to restrict users from exporting data you consider to be sensitive.
- Due to impacts on site performance, you may want to provide the option of a reduced export type (if that satisfies a need), and a more comprehensive type (to meet GDPR requirements).

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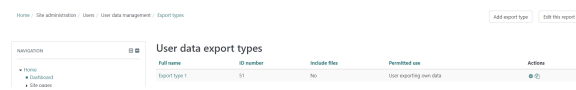
- [User profile](#)
- [Site policies](#)
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The Totara Academy has a whole course dedicated to [User data management](#) in Totara Learn. Here you can learn more on how to use the user data management tools, see best practice, and give it a go yourself.

Users will only be able to export their own data and not that of others. When creating an export type, **User exporting own data** has to be selected to make the type available for use. Additionally in **Settings**, the option for allowing user exports has to be selected to make the export function available to users.

Choosing to include files in an export will impact both the size of the export file and the time it takes to be generated, which may impact site performance. You have the option of creating export types that don't include files, although the exported data would still indicate that the files exist (e.g. as attachments to posts).



## Creating an export type

To create a new export type follow these steps:

1. Go to *Site administration > Users > User data management > Export type*.
2. Click the **Create export type** button in the top right corner of the screen.
3. Complete the **settings** to your preference (see below for more details).
4. Click the **Add** button to complete the process.



Occasionally new components may be added to the system (e.g. a new plugin is installed) which means there are potentially more items containing user data. These items will be ignored by existing export types until a site admin has edited the types affected (by choosing whether to select them or not for export). Admins will receive a notification that new items have been added. When editing an affected export type, the individual items will be highlighted with a **New** label. Once the export type is saved, the labels and warning will be removed.

## Export type settings

You can decide which information should be included in the export file, as well as whether it will include files or not. Use the contextual help icon ( ) to see further details on each data type.




If you select an item to export data for then (generally) all user related data held in that item will be exported. This includes data that the user might not normally be able to see. For example, if there is a hidden forum, but you tick forum posts, it will still export the hidden forum's data. In some cases there may be separate options for exporting visible and non-visible data, but this is only in limited cases.

Setting	Description	Notes
<b>Full name</b>	The name of the export type	-
<b>ID number</b>	This is a unique ID number used to identify the export type.	-
<b>Description</b>	This can be used to describe the purpose and limitations of the export type. This is especially useful if you have multiple export types and/or the <b>Full name</b> isn't very descriptive.	-
<b>Permitted use</b>	Tick the box to allow user to export their own data, this also makes the export type available for use.	Where an export type allowing a user to export their own data is available, users can request this export via the <b>Administration</b> section of their <b>Profile</b> .
<b>Include files</b>	Tick the box if you wish to include files in the export.	Including files in the export can significantly increase the size of the export file.
<b>User data</b>	Choose which pieces of user data to include in the export including first name, username and email address. Tick the box to include data or untick is to exclude it from the export.	-

<b>Activity module data</b>	Decide which personal, user generated, content from various activity modules to include, such as forums and glossaries. You can decide to include elements such as comments, posts, and ratings. Tick the box to include data or untick is to exclude it from the export.	-
<b>Block type data</b>	Decide which personal, user generated, content from various block types to include, such as Recent activity and Admin bookmarks. Tick the box to include data or untick is to exclude it from the export.	
<b>Course completion data</b>	Tick the box to include data or untick is to exclude it from the export.	-
<b>Plugin and Component type data</b>	Decide which personal, user generated content from various components, plugins and site features to include, such as Messaging, Hierarchy and Enrolment information. Tick the corresponding box(es) to include data or untick is to exclude it from the export.	-

## Managing export types

You can duplicate () , edit () , and delete () any of the existing export types as needed using the icons in the **Action** column.



You will not be able to delete the initial export type, as there needs to be at least one export type in existence. If you wish to change this primary export type then you should edit it.

## Exports, purges, and deleted users reports

You can see a list of pending or complete exports or purges by going to either:

- **Export:** *Site administration > Users User data management > Exports.*
- **Purges:** *Site administration > Users User data management > Purges.*

A separate page contains a report listing deleted users (they are not included in the **Browse list of users** report). Depending on how much data has been purged from the account, there may be very limited user information on their record. You can see this report by going to *Site administration > Users User data management > Deleted user accounts.*

## Purge types

A purge type contains a list of data items that will be purged (deleted, or anonymised if deleting is not possible due to system constraints) when a purge task is run. A purge type is restricted to being applied to a single user status type (Active, Suspended, Deleted). This is because the user status dictates which items may be available for purging (e.g. some data, like email address, is only safe to delete when a user is in a **Deleted** state), and because scheduling a purge is connected to a user being assigned the **Suspended** or **Deleted** status (this status is the marker that indicates the user's data should be purged in the next scheduled run of that purge type). User statuses are a way for the system to track the state of a user, in order to make a user suspended or deleted you simply need to go to their profile and suspend or delete them (see more on the [User accounts](#) page) either via their account or via a bulk action.

Examples of when you may wish to purge a user's data include:

- Where the requirement is to remove all user data, a 'Deleted user' purge type that includes all data items could be created, to ensure that any data not deleted during the standard deletion process is removed.
- If your organisation has to balance GDPR compliance (remove data) with other regulations (for example, keeping certification/training data on file), a purge type that deletes everything that is not needed could be created. Importantly, these users should not be **Deleted**, but merely **Suspended**, and a suspended purge type applied.

Purge tasks can be scheduled (automatic) or executed on an ad hoc basis when needed (manual). If neither automatic nor manual application has been selected, the purge type will not be available for future purges until one of these are selected. Only manual purges can be done on **Active** users. It is important to note that running a data purge on **Active** users can be risky because they may be interacting with the system while their data is being deleted, which may have unexpected consequences.

Guidance on running manual data purges on individual users can be found on the [User accounts](#) help page.

When creating a purge type, you will select individual data items, to indicate that those items are to be deleted during a purge. It is important to remember that leaving an item unselected doesn't guarantee that a user will have this data after the purge has run. For example, if they are separately deleted (outside of a purge, simply by [deleting their user account](#)) then a significant amount of these data items should already have been deleted).



Deleting Gradebook data, but not grades from individual activities, will result in the Gradebook data being recalculated (and therefore repopulated) after the purge has run. To ensure that all grades are fully purged from the system, the following activities will also need to be purged: quiz, assignment, lesson, and Workshop assessments.

Forum posts cannot be removed entirely without breaking the experience of forums for other users – in this case, the post content (and even author data) might be removed, but the rest of the thread from other users would remain intact



## Creating a purge type

To create a new export type follow these steps:

1. Go to *Site administration > Users User data management > Purge type*.
2. Click the **Create purge type** button in the top right corner of the screen.
3. Select the user status to apply this purge type to. Choose from deleted, suspended, and active.
4. Click the **Continue** button.
5. Complete the [settings](#) to your preference (see below for more details).
6. Click **Add** button to complete the process.



Occasionally new components may be added to the system (e.g. a new plugin is installed) which means there are potentially more items containing user data. These items will be ignored by existing purge types until a site admin has edited the types affected (by choosing whether to select them or not for purge). Admins will receive a notification that new items have been added. When editing an affected purge type, the individual items will be highlighted with a **New** label. Once the purge type is saved, the labels and warning will be removed.

## Purge type settings

You can decide which information should be included in the purge.

Setting	Description	Notes
<b>Full name</b>	The name of the purge type	-
<b>ID number</b>	This is a unique ID number used to identify the purge type.	-
<b>Description</b>	This can be used to describe the purpose and limitations of the purge type. This is especially useful if you have multiple purge types and/or the <b>Full name</b> isn't very descriptive.	-
<b>Permitted use</b>	Decide whether to set a manual or automatic purge.	For automatic purging, the relevant purge type can be assigned to an account either before or after their status changes. Either way, when an account's user status matches that specified by its assigned purge type, the data purge will take place during the next <a href="#">scheduled purge task</a> .
<b>User data</b>	Choose which pieces of user data to include in the purge including first name, username and email address. Tick the box to include data or untick is to exclude it from the purge.	Some details, such as first name and last name are not available for Suspended user purge types, as a name is required for the account to work in the site.

<b>Activity module data</b>	Decide which personal, user generated, content from various activity modules to include, such as forums and glossaries. You can decide to include elements such as comments, posts, and ratings. Tick the box to include data or untick is to exclude it from the purge.	-
<b>Block type data</b>	Choose which personal, user generated, content from various block types to include, such as Recent activity and Admin bookmarks. Tick the box to include data or untick is to exclude it from the purge.	
<b>Course completion data</b>	Tick the box to include data or untick is to exclude it from the purge.	-
<b>Plugin and Component type data</b>	Decide which personal, user generated content from various components, plugins and site features to include, such as Messaging, Hierarchy and Enrolment information. Tick the corresponding box (es) to include data or untick is to exclude it from the purge.	-

#### Update purge type

There are required fields in this form marked \*

Full name\*

ID number\*

User status restriction Deleted

Description

Available use  Manual data purging  Automatic purging once user is deleted



If you purge the audience membership for someone who is part of a dynamic audience, that membership may be restored on a following cron run (however the user's other data will not be).

When users are purged from an audience they are not automatically sent a notification.

## Managing purge types

You can duplicate () , edit () , and delete () any of the existing purge types as needed using the icons in the **Action** column.

## Purging legacy deleted users

If a user was deleted before the purge system was available then they will not be automatically removed when the purge is run. Instead they will need to be deleted manually or have their purge type manually updated.

This is the same for users who have been deleted prior to a default being set, however, the difference is legacy deleted users show a delete icon next to their name in the deleted users list.

## Exporting data

### What data needs to be exported?

In order to comply with both [Article 15](#) and [Article 20](#) of GDPR (General Data Protection Regulation, an EU law enforced from 25 May 2018) Totara Learn allows user data to be exportable that is both about the user ('concerning them') and is of a personal nature ([defined as](#) information that is 'relating to an identified or identifiable natural person').

### Enabling user data exports

To enable user data exports you must take three steps:

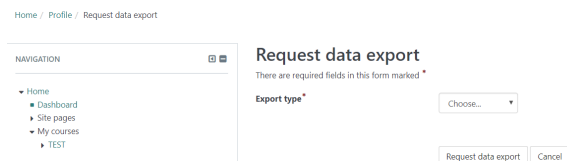
1. Edit the [desired role](#) (if you do this with **Authenticated user** it will apply to everyone) to set the following capabilities to **Allow**:
  - **View user data configuration**: `totara/userdata:viewinfo`
  - **Export own user data**: `totara/userdata:exportself`
2. Go to *Site administration > User > User data management > Settings* and enable the **Allow users to export their own data** option.
3. Create an export type and ensure that **Export of own user data** is enabled.

## How to export data

A user can request an export of their own data following a link on their profile page. Generating an export file may take some time, so users will be notified when the file is ready for them to download. It will be stored for 5 days, during which time they will need to download it, before it is removed. They will only be able to request one export at a time. The download will be a ZIP file containing a JSON file, and other files if they've been included in the request.

To generate an export follow these steps:

1. Go to your **Profile** page by clicking your name in the top right corner.
2. Under the **Administration** section click the **Request data export** link.
3. From the dropdown menu select the export type you want.
4. Then click the **Request data export** button.



You will then see a confirmation message that your export has been started but could take some time. As the export may take a while to generate you will be notified once it is available. After receiving the notification follow the link to the download and click the **Download data export file** button.

## Related pages

In addition to the content on this page you will find additional information about related user data management features in the following places:

- **User profile**: On the User profile help page you can find information about site policy consents and user data settings under the **Administration** section.
- **Site policies**: You can set up multiple user policies, which can be a useful way of informing users about how their data will be managed on your site.
- **User accounts**: On the User account help page you can find more information on viewing and managing data in the **User data** section.