

TOTARA: SETTING UP THE DEFAULT USER PROFILE

*This is a transcript of a video
on the Totara Academy*



WELCOME TO THIS VIDEO ON SETTING UP THE DEFAULT USER PROFILE IN TOTARA.

Each user on your site has their own profile, where information about them and their actions in the system are stored. As Site Administrator, you decide what is shown on the user profile and how it appears to users. In this video, we'll look at how to do that.

To get started, I'll go to the quick access menu and select **Users**, then select the **Default profile page**.

Here you can see the default profile page on a new site. Let's make some changes.

I'll turn **Blocks editing on** to make my profile editable.

As you can see, the profile is actually comprised of a series of blocks, each with a different focus. You can add and remove blocks and edit the content within them. So, you can customise how the user profile displays to users on your site, depending on your needs.

I'll start by cleaning up the profile by removing blocks I don't need. We don't use job assignments on this site, so I'll remove this block and confirm I'm happy to do so. You can always add blocks back in so don't worry if you make a mistake.

I'll also rearrange the blocks, moving the **Administration** options over to the left.

All of my users are in one timezone, so I don't need to show the timezone on their profile. So, I'll quickly edit this block to remove that field.

All user profile blocks work in exactly the same way. In the **Custom block settings** section, you decide which category of content your block should contain and then within that which fields should display. Note that fields will only show on the profile if the user has that field populated.

I'll remove the **Timezone** option and save my changes.

As you can see, the **Timezone** field no longer displays on the profile.

I also want to display users' badges on their profile, so I need to add a new block.

All of these blocks have the same block type: **User Profile**, but note you can also add other blocks to the profile if you want to.

I'll start to configure my new block.

I'll go straight to the same **Custom block settings** and select **Badges**.

I'll **Save changes** to add the block to the default profile.

The badges I've received are now shown on the profile. I'm now happy with the default profile so let's have a look at how it appears to users.

Here I'm logged in as a non-admin user on the site. Each of the blocks in my default profile is shown to the user. They can use the profile to access key parts of the site, such as their **Evidence bank** or **Competency profile** which are also available through the top navigation of course.

But there's even more you can do. You can add custom profile fields to be displayed on the profile through this page.



You decide on the type of field and enter the details you want users to complete. In my case, I want to indicate if someone is a team leader.

I'll make it mandatory and then **Save changes** to add my profile field.

Now if I go to the **Default profile page**, I can see my new field on the profile.

You can customise the profile even further by setting different visibility permissions for each block on the profile too.

So, for example, you could choose to hide the **Administration** block from everyone other than Site Administrators.

To do this, simply remove the permission to view the block from all other users.

As Site Administrator, I can still see the block, but if I log in as a Learner user, the block is no longer visible.

One final tip on the user profile is to spend time making it look as good as possible. The profile is more than just a display page, it's the user's presence on your site. Make changes like changing titles of blocks, showing or hiding borders and adding other types of block. For example, you could add a recommendations block to give users a reason to visit their profile (and perhaps then complete more information about themselves).

So, this is an individual profile as it appears to the user in question. But there are also places on the site where a snapshot of the profile is shown to other users. This is called the **User profile summary card**, which is also edited from the **Users** page.

The summary card is shown where it's important for other users to be able to see information about a user, such as in the **Members** tab of a workspace, or seeing the creator for user-generated resources and playlists.

The summary card can show up to four pieces of information, along with the user's picture, taken from the **User details** block on their profile. You choose what information to show. This allows you to protect personal data (for example, you may decide not to share phone numbers) but make the relevant information visible.

Including the **User picture** is a good idea to bring a sense of community to your site.

I'll say I want to include the user's **Full name**, where they are based and their **Email address**. I'll **Save changes** to update the summary card on my site.

Now if we go to a workspace and have a look at the **Members**, you can see the summary profile information for each user here.

So that's setting up the default user profile and summary card in Totara.

End