HR Import

Enterprise HR systems store and maintain critical information about the people making enterprises run. These systems are updated daily as people join the enterprise, change positions, reorganise, leave and return - to name a few of the very large number of key data elements typically collected and tracked.

All people working in an enterprise need training and development regularly, and most of the training and development they need is directly related to information maintained in the enterprise HR system. The way data is stored in an enterprise's HR system depends greatly on both the enterprise HR system being used and they way the enterprise HR system has been configured for the enterprise.

HR import allows the people, position and organisation data in Totara Learn to be regularly and automatically updated with all the relevant data delivered from enterprise HR systems. HR import is a one-way synchronisation process (from the enterprise HR system to Totara Learn) supporting two types of data exchanges:

- CSV file
- External database connection

(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).

Using HR import

If you want to use HR import by uploading a CSV file then you will need to follow these basic steps.

1. Configure the default settings.
2. Configure the element.
3. Configure the source.
4. Create the file.
5. Upload the file.
6. Run HR import.
7. Check the HR import logs.

You can find more detail on each of these steps within this Help documentation - as linked in the steps above.

Benefits of using HR import

HR import keeps Totara Learn up-to-date with enterprise HR systems without the need to manually enter, update, and delete data. The process automatically creates, updates, and deletes these record types: users, positions, organisations, as well as assignments to positions, organisations, and managers.

When HR import is used in combination with Totara Learn's Audience management and Report builder features, Totara Learn will dynamically deliver access to learning content and learning records to the appropriate people within an enterprise based on current HR information.

Audiences

Audiences can be defined on the basis of rules, where membership and learning assigned to audience members can be updated on a regular basis. Audience rules can be comprised of any HR data field found in Totara Learn (i.e. organisation, position, and user data). Audience rules (e.g. 'Organisation name is Corporate Finance') can be combined into rule sets (e.g. 'Organisation name is Corporate Finance AND Position ID is 988 AND User Start Date is less than 12 months ago AND Employment Status is Full-time AND Employee ID is not ADV994'). When Totara Learn has up-to-date HR data (via HR import), audiences will keep membership and assigned learning consistent with the current status of every person in the enterprise.

See Audiences for more information.

Report builder

Report builder allows reports to be created and configured to control which columns of data and filters are shown in a given report, as well as which records are shown to a user viewing the report. Similar to audience rules, a report's columns can be comprised of any HR data field found in Totara Learn (i.e. organisation, position, and user data). For example, reports can include columns such as **User Department**, **User City**, **User Country**, **User Organisation**, **User Position**, **User Manager Name**, and **User Manager ID**.

Related pages

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

A report's filters can also leverage all of these HR data fields as well as the hierarchical relationships in the HR data. For example, a report viewer can filter a report by organisational hierarchies such as or below organisational levels. Report builder can also leverage hierarchical data to only show records to report viewers based on their relationship to other users (e.g. direct reports, in the same area of the organisational hierarchy, etc). When HR import runs on a daily basis, every report's available records, columns, and filters are up-to-date with the latest HR data.

See Report builder for more information.

Learn more and try it for yourself in the Creating users course on the Totara Academy.