

Totara Connect



You need to be a Site Administrator, or have the appropriate permissions to be able to configure any settings related to Totara Connect.

Totara Connect is a single sign-on (SSO) and user identity solution for multiple Totara instances. Connected sites can share user accounts and logins, allowing all users or selected audiences to navigate between them seamlessly.

Totara Connect requires one Totara site to act as the server. Once Totara Connect has been enabled and configured on the server, it is then possible to start connecting more Totara or Totara Social sites as clients. Once connected information is then synchronised from the server to the client.



Please note that Totara Connect is not compatible with guest access. If you want to use Totara Connect it is recommended that you configure alternative [enrolment methods](#) and disable guest access on courses where it is used.

Totara Connect server

Totara Connect server is a plugin that facilitates the server side aspects of connecting sites effectively, allowing the site to act as a master to which client sites can connect and synchronise.



Totara Connect server is disabled by default. To enable it you must log in as a Site Administrator and turn on **Enable Totara Connect server**, which can be found under *Quick-access menu > Configure features*.

Once enabled a new administration section will become available at *Quick-access menu > Users > Accounts > Totara Connect server*.

Even when enabled, by itself the server plugin is inactive. It is not until a second Totara site is connected as a client that the Totara Connect server provides added functionality.

Totara Connect client

The Totara Connect client is an authentication plugin that facilitates a connection between the current site and one or more Totara site(s) with an active Totara Connect server.

To be able to add a client to a Totara Connect server, you first need to enable the **Totara Connect client** authentication plugin. Go to *Quick-access menu > Plugins > Authentication > Manage authentication* and enable **Totara Connect client** by selecting the icon in the **Enable** column.

Manage authentication

Available authentication plugins

| Name | Users | Enable | Up/Down | Settings | Test settings | Uninstall |
|-------------------------------|-------|--------|---------|--------------------------|---------------|---------------------------|
| Manual accounts | 4 | | | Settings | | |
| No login | 0 | | | Settings | | |
| Email-based self-registration | 0 | | ↓ | Settings | | Uninstall |
| Totara Connect client | 0 | | ↑ | Settings | | Uninstall |

Set up a Totara Connect client for Totara

Once you have enabled the Totara Connect server, you'll then need to configure the Totara Connect client. Make sure you have [enabled the Totara connect client authentication plugin](#) on the client site first.

To set up a Totara Connect client follow these steps:

1. First [configure your Totara Connect server settings](#).
2. Next [configure your Totara Connect client settings](#).
3. Then [connect to a Totara Connect server](#).
4. Finally, [add your Totara Connect client](#) to your Totara Connect server.

Totara Connect settings

Configure Totara Connect server settings

Go to *Quick-access menu > Users > Accounts > Totara Connect server > Settings.*

Sync user passwords: If you want to send user password hashes from your server site to client sites, enable this option.

Configure Totara Connect client settings

Go to *Quick-access menu > Plugins > Authentication > Totara Connect client > Settings.*

| Setting | Description | Notes |
|---|--|--|
| Automatic single sign-on via server | This setting allows you to automatically log on to a Totara Connect client site connected to a specific Totara Connect server. Choose a Totara Connect server to automatically sign-on from. Note that you need to connect to a server first to select it from the list. | - |
| Migrate local accounts | When enabled, local accounts are migrated to Totara Connect accounts. Totara Connect accounts can log in only via single sign-on. | You should make sure the selected account mapping cannot be abused by Totara Connect server users to hijack existing client accounts. For example when mapping via username, users should not be allowed to sign up for new accounts on the Totara Connect server. |
| Account mapping | Choose the field you want to use to map user accounts by during migration. You should make sure this field is locked and cannot be modified by ordinary users or customised during user self-registration, both on the server and clients. User fields available are: <ul style="list-style-type: none"> • Username • Email address • ID number • Totara Connect unique ID | - |
| Synchronise custom profile fields | When enabled, custom profile field data for users will be automatically copied from the server site. | Matching custom profile fields must be created manually on the client site first. |
| Action to take when a user is removed from the restricted audience | If your Totara Connect users are restricted to an audience on the server, this setting determines what happens with local accounts when the user is removed from that audience on the server. Options are: <ul style="list-style-type: none"> • Keep internal user • Suspend internal user • Full delete internal user | Please note that any synchronised users who are deleted from the server will also be deleted from the local site. |
| Synchronise job assignments | When enabled, job assignments will be automatically copied from the server site. Managers and appraisers are not synchronised, and other manual changes in synchronised job assignments are automatically reverted. Manual job assignments can still be used and are not affected. | - |
| Synchronise positions | When enabled, position frameworks and positions will be automatically copied from the server site. It is recommended to change permissions so that users cannot modify positions manually. | Position types must be created manually with the same ID numbers, including any matching custom fields from the server site on the client site. Custom fields should also be locked on client sites. |
| Synchronise organisations | When enabled, organisation frameworks and organisations will be automatically copied from the server site. It is recommended to change permissions so that users cannot modify organisations manually. | Organisation types must be created manually with the same ID numbers, including any matching custom fields from the server site on the client site. Custom fields should also be locked on client sites. |
| Allow requests to plugin services | When enabled allows requests from Totara Connect servers to access services defined in any plugins. | - |

Connect to a Totara Connect server

Go to *Quick-access menu > Plugins > Authentication > Manage authentication > Totara Connect client > Servers* and select **Connect to new server**.

 Note down the **Client URL** and **Client setup secret** as you'll need this information to complete the setup.

Totara Connect servers

For security reasons all Totara Connect clients should be hosted via a secure protocol (https).

There are no records in this report

Send this information to the Totara Connect server administrator:

- Client url: http://totara9.local
- Client setup secret: e98e7d1c83f0f9b3a44059e15a9e37301adb36fe

Cancel connection

Add a Totara Connect client

Login as a site administrator to the site which is acting as the Totara Connect server, go to *Quick-access menu > Users > Accounts > Totara Connect server > Client systems* and select **Add client**.

| Setting | Description | Notes |
|--------------------------------------|--|---|
| Name | Enter a name for the client site. | - |
| Client URL | The URL of the client site. This should be the URL provided when connecting to a new server . | |
| Client setup secret | The setup secret for the client site. This should be the client setup secret provided when connecting to a new server . | - |
| Allow plugin service requests | When enabled allows requests from Totara Connect servers to request services defined in any plugins for the Totara Connect client. | - |
| Sync custom profile fields | When enabled, custom profile field data for users will be automatically copied from the server site. | Custom profile fields must be created manually with the same short name on the client site first. |
| Sync job assignments | When enabled, job assignments will be automatically copied from the server site. Managers and appraisers are not synchronised, and other manual changes in synchronised job assignments are automatically reverted. Manual job assignments can be still used and are not affected. | - |
| Sync position frameworks | Choose the position framework(s) to synchronise to the client site. | - |
| Sync organisation frameworks | Choose the organisation framework(s) to synchronise to the client site. | - |
| Restrict to audience | You can choose to only synchronise users from a specific audience from the Totara Connect server to the Totara Connect client site. The restriction is applied to all synchronised audiences and courses too i.e. only the audience restricted gets synchronised. | - |
| Add new courses | If enabled, each new course created in the LMS will be synchronised with the client to create a matching new audience (Totara Learn). The enrolled users of the courses will be added as members to the respective groups or audiences created. | - |

| | | |
|-------------------------------|---|---|
| Add new audiences | If enabled, each new audience created in the LMS will be synchronised with the client to create a new audience (Totara Learn). The members of the audiences are added as members to the respective groups or new audiences. | - |
| Synchronised audiences | Choose one or more audiences and synchronise members to the client site. | - |
| Synchronised courses | Choose one or more courses and synchronise all enrolled users to the client site. | - |
| Comment | Add any applicable comments related to the client site. | - |

i When a client has 'Automatic single sign-on via server' assigned, the site administrator (and any other users that have accounts on client) will not be able to sign in from the login screen. If a user needs to access the client site directly, a login page parameter '?nosso=1' can be added to the client login address. For example http://_clientURL_/login/index.php?nosso=1 .

Note that this will give access to any user with an active account on the client server (by-passing the SSO server).

Once complete, select **Add client**. You'll now see that the column **Status** shows an **Active** connection between the server and the client site; a new option will become available on the login page of the client site.

Totara Connect clients

For security reasons Totara Connect servers should be hosted via a secure protocol (https).

| Name | ID number | URL | Synchronised audiences | Synchronised courses | Comment | Registered | Status |
|----------------|--|---|------------------------|----------------------|---------|----------------------|--------|
| Totara LMS 9.0 | 3ba2adbd4a3b8d24785bfad43fe9eb7095955806 | http://totara9.local | | | | 19 Nov 2016 at 20:16 | Active |

For security reasons all Totara Connect clients should be hosted via a secure protocol (https).

Add client

Set up Totara Connect client for Totara Social

To set up a Totara Connect client for Totara Social please see the [Totara Social 2.0 documentation](#) for further information.

Logging in a Totara Connect client site

Follow these steps to log in to a Totara Connect client site:

1. Navigate to the client site in your browser.
2. Select **Log in using your account on:[Server site name]**. If you're not already logged into the Totara Connect server site, you'll be prompted to log in.
3. An account will be created on the server site if it doesn't exist and copy over all the user's profile fields with the exception of:
 - Interests
 - Username (this is automatically generated by Totara Connect and starts with letters "tc")
 - ID number (used by HR Import)

Totara Connect scheduled tasks

i If you're new to scheduled tasks, see our [dedicated page](#) for more information about how they work.

| Task | Description | Code |
|------|-------------|------|
|------|-------------|------|

| | | |
|-----------------------------------|---|---|
| General cleanup task | This task runs internal clean up tasks required by the Totara Connect client. | \auth_connect\ \task\cleanup_task |
| User collections sync task | This task checks the server for audience groups that are scheduled to be synced and recreates those audiences on the client. | \auth_connect\ \task\user_collections_task |
| Users sync task | This task syncs all information related to the individual users. This includes profile field data, user custom field data and job assignment data (includes position and organisations, but excludes managers and appraisers). | \auth_connect\ \task\user_task |
| API handshake | This task checks the server to make sure that the client is connecting with the latest available version of the API. If the server has been upgraded and the client supports it, this will switch to using a newer API version. | \auth_connect\ \handshake_task |
| Positions sync task | Responsible for syncing position hierarchy frameworks from the server to the client. Only the frameworks configured to be transferred will be synced. Note that syncing will override any local changes to the frameworks on the client side. This task does not update the position in job assignments - that is handled by the user task. | \auth_connect\ \position_task |
| Organisations sync task | Responsible for syncing organisation hierarchy frameworks from the server to the client. Only the frameworks configured to be transferred will be synced. Note that syncing will override any local changes to the frameworks on the client side. This task does not update the organisation in job assignments - that is handled by the user task. | \auth_connect\ \organisation_task |