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 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) supporting two types of data exchanges:

- CSV file
- External database connection

CSV files can be uploaded into Totara and an HR import run on an ad hoc or manual basis. A detailed, searchable and filterable report log provides a record of all previous imports.

(This video above is taken from the Creating users course in the Totara Academy).

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.

Note that job assignments cannot be updated using HR import unless the setting is enabled for each job assignment. Check that the **HR import** box is ticked when creating or editing a job assignment on a user's profile page.

Benefits of using HR import

HR import keeps Totara up to date with enterprise HR system data, without the need to manually enter, update and delete data. By adding the latest organisation, position, competency, user and job assignment data, Totara can reflect an organisation's structure and store current information about learners and managers, and the learning they should undertake.

When HR import is used in combination with Totara's audience management functionality, Totara can dynamically provide learners access to targeted learning content, based on the latest 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 consist of any HR data field found in Totara (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 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 comprise any HR data field found in Totara (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**.

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 Reports for more information.

Upgrading job assignments

If you are upgrading from Totara v9 or lower to v13 for the first time then you will need to ensure that your HR import data is compatible with the new **job assignment** import source. The best approach for doing this will depend on if you have been using multiple job assignments prior to upgrading or not. Either way in v10+ you will need to create a **jobassignment.csv** file - this applies even if you are not using multiple jobs but you want to continue to import position, organisation, and manager data.

If you do not use multiple jobs then you should:

1. Copy your existing **user.csv** source file.
2. Edit it to remove fields not required for job assignments and add fields that are required for the new job assignment source.
3. Re-save the file as **jobassignment.csv**.

You should then have two files suitable for import (**user.csv** and **jobassignment.csv**). When transforming the user file into a job assignment file it is useful to note that any column names that started with 'jobassignment...' can be shortened. For example, 'jobassignmentfullname' becomes 'fullname'.

If you are using database sources for your HR import then you can follow the same process as above, however you might find it more difficult to rename database columns than it is to rename columns in a CSV file. Therefore you may want to make use of the **Field mappings** section when setting up your database settings for the job assignment source. This means if your database has a field called **jobassignmentmanageridnumber** which should now be renamed to **manageridnumber** you can simply enter **jobassignmentmanageridnumber** into the corresponding field under the **Field mappings** heading. You can access these settings under *Site administration > HR import > Sources > Job assignment > External database*. For databases, you don't have to remove the extra user columns that are no longer needed. As long as those field mappings have been configured so that HR import will look for the right columns for job assignment data, any other columns will be ignored.

Whether or not you were using multiple jobs before upgrading there are two columns it is important to to pay attention to, **idnumber** (was **jobassignmentid number**) and **useridnumber** as these fields link the user to the job you are creating or updating.

You can read more on the HR import sources page.

Whilst adjusting your files for the the new import source it is also advisable to review your **Element settings** for the job assignment imports and ensure each option is set as you prefer.

Totara Academy

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