

# How to Guide – Manual HR Import

## Overview

The HR Import tool allows you to keep the LMS up-to-date with most current data from your HR system. The process can be automated to import the data generated by your HR system into the LMS on a specified schedule.

To achieve a successful import it is paramount that the .csv template/s provided are populated with the correct/accurate data ready to import and that the appropriate settings have all been applied correctly on the LMS.

If you do not have access to an SFTP in order to automate the process, then you can import the file/s manually using the following process.

There are several files that can be imported depending on which elements are being used on your LMS:

1. **Organisation** – If you are using an Organisation Hierarchy to determine the Directorates/Divisions/Departments/Sections/Teams etc. and these change often within your organisation structure, then importing this file will allow you to keep the organisation up to date. If you have a simple fixed structure that doesn't change very often then this can be maintained manually outside of the HR Import process.
2. **Position** – If you choose to use a Position Hierarchy for the job roles within your organisation and again if these change often, then importing this file will allow you to keep the Position Hierarchy up to date. Alternatively, if there are very few changes then it can be maintained manually outside of the HR import.
3. **User** – This is the part of the LMS database that does change often with requirements for new starters, movers and leavers. Therefore, being able to keep this up to date using the HR import process is essential.
4. **Job Assignment** – For Totara Learn v11 or above only. This file will link your users to the relevant Organisation, Position and Manager

## Step 1

Prepare the .csv file/s required using the template/s provided. Please note that the headings must be exactly as stated in the template.

The data must be accurate and contain data in the format required. Please refer to Appendix 1 for a full description of what is permitted in each column of data.

The .csv file must be saved as .csv UTF 8 encoded.

## Step 2

The settings on the LMS will have already been prepared by Learning Nexus when they imported your initial files for the elements that were imported. Prior to doing a manual import yourself you may need to check these settings in case you are importing a different combination of files:

- **Manage Elements** (*Site administration>HR Import>Elements>Manage Elements*). Hide the files that are not going to be imported.
- **User** element (*Site administration>HR Import>Elements>User*):

- Source should be shown as CSV.
- 'Source contains all records' should be set to the correct setting for the file to be imported i.e. YES indicates a 'Full' file that contains everyone. NO indicates a 'Change' file and only contains some users. If you choose the 'NO' option, then you must make sure you have a column heading in your file for 'deleted'
- Empty string behaviour – choose the required behaviour for how you want the LMS to deal with any empty cells in your import file.
- Allow duplicate emails – make sure you set this to 'YES' if you have more than one user with the same email address.
- Only import new users' passwords – The default is 'YES'
- Force password change for new users – The default is 'YES'
- Link job assignments (Totara Learn v9 or below only) – 'to the user's first job assignment' is the default and should be used if users only have 'one' job assignment.
- Allowed HR Import actions – Create and Update should be ticked. Delete should be set to 'Suspend internal user'
- Organisation and Position elements
  - Source should be shown as CSV
  - Source contains all records – The default in this case is 'YES'
  - Empty string behaviour – Empty strings are ignored is the default setting.
  - Allowed HR Import actions – Create and Update should be ticked. If you wish to delete organisation and/or positions as part of the import then you will need to tick the 'delete' option too.
- Job Assignment element (Totara Learn V11 and up only)
  - Source should be shown as CSV
  - Source contains all records – The default in this case is 'YES' If you file does not contain all records for everyone on the LMS then should be set to 'NO' and a 'deleted' column added to your CSV file.
  - Empty string behaviour – Empty strings are ignored is the default setting.
  - If set to YES then only one job assignment record for each user can be provided. If set to 'NO' then the imported data will be applied to any existing job assignments where the ID number matches.
- Sources (*Site administration>HR Import>Sources*) – This will display the source files you are going to import. You can check the column headings the LMS is expected against the column headings in your file by selecting the source csv - *Site administration>HR Import>Sources>user>csv*

### Step 3

In order to prevent duplicate accounts - If you have any users that have been added manually (outside of an HR import) on your LMS and you now want to update these accounts as part of the HR Import, you will need to make sure you update these accounts to enable 'HR Import' and check that they have the correct idnumber.

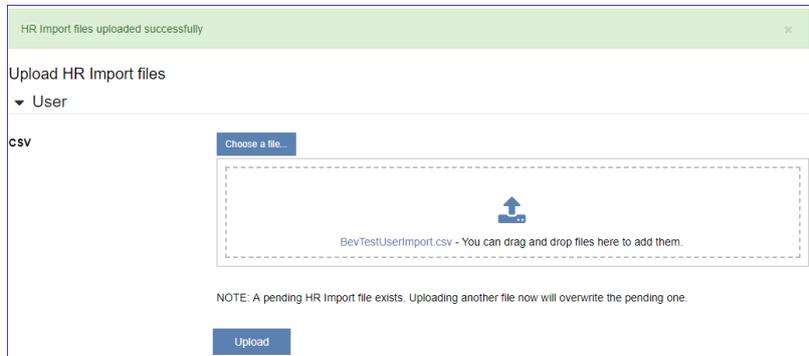
*Site administration >Users > Accounts > Browse list of Users* – select the user you need to update. Edit their profile and tick the box next to 'HR Import', scroll down to the section for 'Optional' and check the idnumber matches what is in your import file.

## Step 4

You are now ready to import the file/s. Go to *Site administration > HR Import > Sources > Upload HR Import files*. Drag and drop or choose file to add the CSV file to the appropriate box.

Once the file has loaded into the box select the 'Upload' button

A message will appear to say 'HR Import files uploaded successfully'

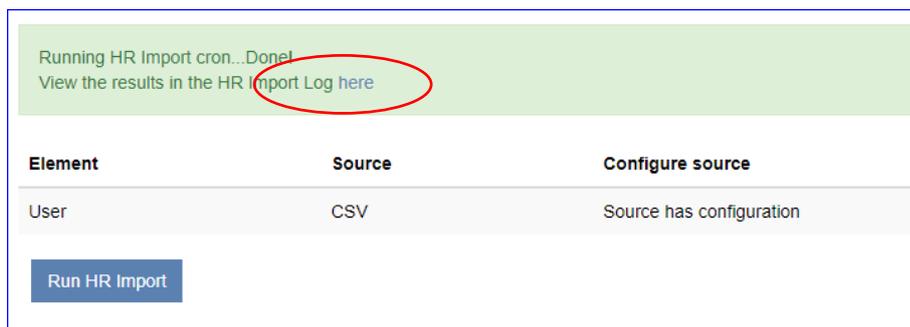


Return to the Site administration menu and go to *Site administration > HR Import > Run HR Import*

Select the 'Run HR Import' button



Once the import has run a message will appear at the top of the screen, indicating that you can view the results. If any errors are indicated then you will be able to view the errors here:



The HR Import log can be viewed at any time by going to *Site administration > HR Import > HR Import Log*

For any further help please contact our support desk via [support@learningnexus.co.uk](mailto:support@learningnexus.co.uk)

## Appendix 1 (.CSV Template Field definitions)

### Organisation & Position Import Files

- **idnumber** – the id number given to the organisation/position in the LMS
- **timemodified**– the date and time the organisation/position was last modified in the HR system converted to UNIX time stamp
- **frameworkidnumber**– the id number given to the organisation/position framework in the LMS
- **fullname** – the name given to the organisation/position in the LMS
- **parentidnumber** – the id number given to the parent organisation/position in the LMS if applicable

### User Import File

The USER .csv file has the following mandatory data requirements (please note this file must include the column headings as specified):

- **idnumber** – 1-100 characters. This will be a unique identifier for all users (never changes for a given user). This is a mandatory field and cannot be left blank
- **timemodified** – This will be the last time and date the users record was last updated converted to UNIX time stamp or '0' to force an update
- **username** – 1-100 characters. Must be unique for all users. This will be the username each user uses to login. Must be lowercase. For example, email address or employee number. (This may be defined by Single Sign On, if required) - This is a mandatory field and cannot be left blank
- **firstname** - 1-100 characters. Users first name - This is a mandatory field and cannot be left blank
- **lastname** – 1-100 characters. User's Surname name - This is a mandatory field and cannot be left blank
- **email** – Valid email address, max 100 characters. User's email address all in lower case - This is a mandatory field and can not be left blank
- **auth** -- if using a single sign on authentication there will be a specific entry for this field, if no single sign on then this entry will be 'manual'
- **deleted (or suspended)** – only used if using a CHANGE file option – populated with '1' to delete/suspend the user or '0' not to delete/suspend.

**Totara Learn v9 or lower will also need to include the following in the User Import File:**

- **jobassignmentfullname** - up to 100 characters, space, ampersand, parentheses, forwardslash. Job assignment title
- **jobassignmentidnumber** – 1-100 characters. Matches valid job assignment number. Null assumed if not provided.
- **orgidnumber** (optional) - 1-100 characters and must match the valid idnumber for the specific part of the organisation as per the organisation framework
- **posidnumber** (optional) – 1-100 characters and must match the valid idnumber for the position as per the position framework.

- **manageridnumber** (optional)– *the id number (i.e.employee number/payroll number) for the line manager*

Further optional fields that can be included in this User import are:

- firstnamephonetic
- lastnamephonetic
- middlename
- alternatename
- city
- country
- timezone
- lang
- description – *this enables some text about the user which displays on their profile page for others to view*
- institution
- department – *this is not linked to the hierarchy framework*
- phone1
- phone2
- address
- auth – *if using a single sign on authentication there will be a specific entry for this field, if no single sign on then this entry will be 'manual'*
- password – *if a new starter is created and a password column included but left empty, then a system generated password will be emailed to the user.*

Further custom profile fields can be added to the LMS which can also be included as part of these imports. For example: payrollnumber, directorate, location etc. These must be prefixed with 'customfield' so producing a column heading for example: **customfield\_directorate** or **customfield\_location**

Job Assignment File (Totara Learn v11 and up only)

- **idnumber** – *1-100 characters for the unique idnumber of the job assignment (To assign a user a manager, the user must have a job assignment. For example if you want to assign a managerid of 1 to useridnumber of 5, the manager needs to have a job assignment number in the file).*
- **useridnumber** – *1-100 characters. This will be a unique identifier for all users (never changes for a given user). This is a mandatory field and cannot be left blank*
- **timemodified** – *This will be the last time and date the users record was last updated converted to UNIX time stamp or '0' to force an update.*
- **deleted** – *0 or 1 (Required when only job assignments to create, update or deleted are provided, otherwise not necessary. 0 => do nothing, 1=> delete. No action assumed if empty)*
- **fullname** (optional) - *1-100 characters for the full name of the job assignment*
- **startdate** (optional) –*The date the job assignment was started*
- **enddate**(optional) – *The date the job assignment ended*
- **orgidnumber** (optional) - *1-100 characters and must match the valid idnumber for the specific part of the organisation as per the organisation framework*

- **posidnumber** – 1-100 characters and must match the valid idnumber for the position as per the position framework.
- **manageridnumber** (optional)– the id number (i.e.employee number/payroll number) for the line manager
- **managerjobassignmentidnumber** (optional) – automatically required if manageridnumber is set to on and more than one job assignment is required for a user)
- **appraiseridnumber** (optional) – the id number (i.e.employee number/payroll number) for an identified appraiser