LEARNINGSEAT

LearnConnect

FTP SYNC WITH EXTERNAL SYSTEM

LearnConnect is a product of Learning Seat.

Overview

An important feature of a Learning Management System (LMS) is the ability to load data into it from an external system, as well as export that data from the LMS back to the external system. Typically, the external system is a Human Resource Information System (HRIS) or Payroll system.

The reason you would set up this synchronisation is for data integrity and automation purposes. For example, if your HRIS or Payroll system is your primary system for employee data, you would want to pass that employee data to an LMS in order to manage accounts on the LMS. Otherwise, every time a new employee joins, you would need to manually set them up in the HRIS or Payroll system, and then manually set them up in the LMS. Additionally, if their details changed (for example, if they married and their last name changed) you would need to update the details across multiple systems. Finally, if your users had completed important training, you could transfer that information back into your HRIS or Payroll system by automatically exporting that data from the LMS and loading it into the HRIS or Payroll system, instead of having to manually enter the training details into the HRIS or Payroll system.

By enabling data synchronisation, it removes significant manual work from your day-to-day operation, freeing you up to spend time elsewhere. That said, it is likely that you will need to involve your internal IT support team to assist with configuring the data synchronisation.

LearnConnect and your HRIS or Payroll system will need to use a technology called File Transfer Protocol (FTP) to transfer the data between the two systems. This is a standard process for transferring data between two locations or systems.

Below are some high-level details about the process, including a set of simplified diagrams.

Importing User Data from an External System (HRIS/Payroll)

LearnConnect uses a File Transfer Protocol (FTP) transfer to receive a data file from your system. The File Transfer Protocol (FTP) process is simply a way of sending a data file from your server (e.g, HRIS) to Learning Seat. An automated process occurs overnight to look for the data file on the FTP server, and then the data file is processed in LearnConnect to update your employee data. The follow process outlines the steps involved for a client wanting to utilise the FTP sync process.
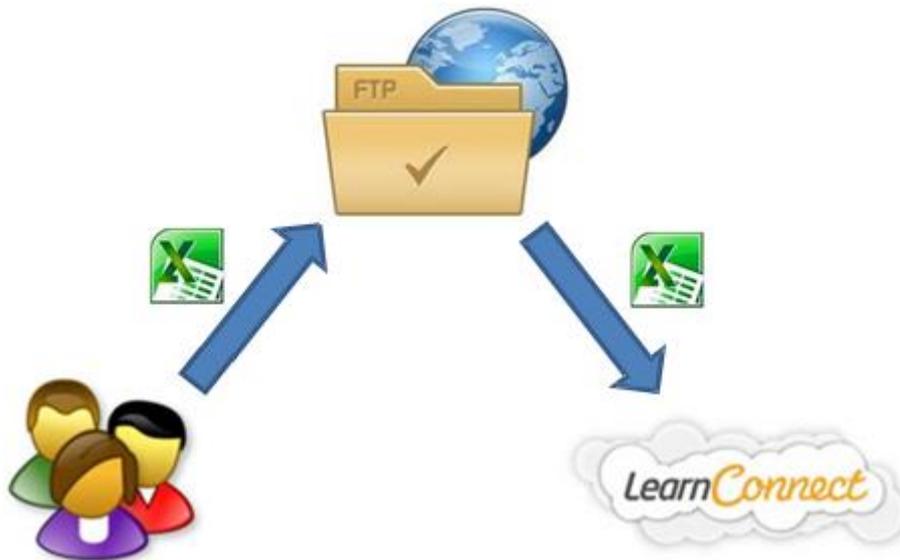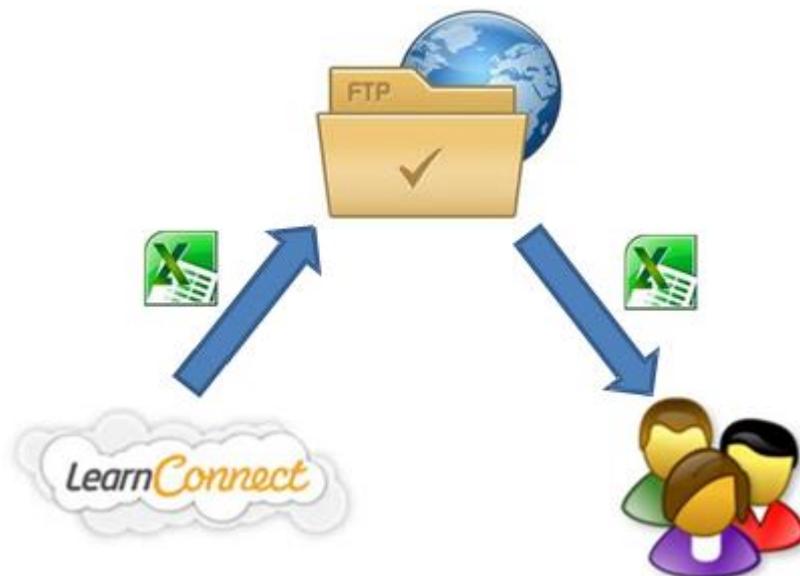

Process

1. Client creates a User Data template in .csv format (that contains all the user fields and group types to appear in the LMS) from either Payroll or one that is manually created.

2. The User Data template is confirmed by Learning Seat as containing all required information.

3. Learning Seat requests client's Public IP address and the intended file name.
   NB: This is to allow the client to access Learning Seat's FTP server – if Learning Seat does not receive this information, the client will not be able to connect to the server.

4. Learning Seat creates a unique FTP account for the client (that is only accessible from the nominated IP address), and provides login credentials to enable the client to test access to the FTP server.
   NB. Separate login credentials will be provided for the Sandbox and Production environment.

5. Client can manually upload the data file to the FTP server, or have their IT department assist them in creating an automated process to send the data file to the FTP server. Learning Seat requires the file to be uploaded to the FTP server. Frequency of the file transfer is determined by the client (eg daily/weekly/monthly).

6. Learning Seat creates a 'job' on LearnConnect to automatically look for the file in the client's FTP folder. **Please note that this will need to be configured to send to our server before 12:00AM (midnight) Melbourne Time.**
   NB: There will be a requirement to test connectivity throughout the implementation process to ensure the client can access their appropriate FTP folder on the FTP server.

Exporting Data from LearnConnect using Custom Reports (via FTP)

Loading information from LearnConnect back to your system requires the use of scheduling Custom Reports within LearnConnect, then transferring that report via FTP to your system. You will also need to configure your system to process the file once it arrives.

Learning Seat requests client's Public IP address, which allows the client to access Learning Seat's FTP server - if Learning Seat does not receive this information, the client will not be able to connect to the server. Learning Seat creates a unique FTP account for the client (that is only accessible from the nominated IP address), and provides login credentials to enable the client to test access to the FTP server.

The following process outline the steps involved for a client administrator wanting to utilise the export report functionality via FTP.

Process

1. Firstly create a custom report (with required fields and filters) in LearnConnect and save it.

2. Create a schedule in LearnConnect to export the report to FTP server in a particular format (eg. csv or xlsx).

3. The reports are generated in this format: Report_Name_YYYYMMDD_HHMMSS (eg. compliance_report_20140115_042735.xlsx).

4. Learning Seat has an automated process running overnight to pick up all these generated reports from the server and placing them in the client's FTP folder at 12:05AM Melbourne time.

5. Client will login with supplied FTP credentials to download this report.

6. Your system will then process the file so the results are loaded.