

Default settings

The **Default settings** page allows you to configure the default method of file access, notification recipients and schedule for automatic data import used across each HR Import Element.

Each [Element](#) can use the default settings or employ customised general settings.

Default settings were previously titled General settings in Totara version 11 and below.

Files

This section allows you to configure how HR Import handles the importing of CSV files.

Elements using default settings

This area lists which [Elements](#) (Job assignment, Organisation, Position, User and/or Competency) are using the default **File** settings.

File access

There are two options:

- **Directory check:** This option allows you to specify a directory on the server to be checked for sync files automatically
- **Upload Files:** This option requires you to upload files via the **Upload sync files** page under *Quick-access menu > HR import > Sources*. Note that this option is enabled by default

Files directory

When **Directory** check is enabled as file access, this option allows you to specify a directory on the server to be checked for sync files automatically. This option is not available when **Upload files** is selected.

Each source file needs to be copied to a directory on the Totara server with the the following file path and filenames:

- **Job assignment:** pathtottotara/csv/ready/jobassignment.csv
- **Organisation:** pathtottotara/csv/ready/org.csv
- **Position:** pathtottotara/csv/ready/pos.csv
- **User:** pathtottotara/csv/ready/user.csv
- **Competency:** pathtottotara/csv/ready/comp.csv

It's not possible to import more than one source file at a time for each source type.

 You need to include the full pathname of your Totara server in the **Files directory** under *Quick-access menu > HR import > General settings*.

▼ Files

Elements using default settings

Competency
Position
User

File access ⓘ

Upload Files ▼

Files directory

/tmp

Notifications

Commonly, the processing of CSV files containing organisation, position, competency and user data takes place in the background and may not be overseen by a site administrator. In this scenario it is important to make sure that problems that may occur during import are addressed quickly and efficiently, so HR import provides the ability to configure whether notifications are issued to specific users should **Errors** and/or **Warnings** occur when data is imported via HR import.

Elements using default settings

This area lists which **Elements** (Job assignment, Organisation, Position, User and/or Competency) are using the default **Notification** settings.

Send notifications

There are two options:

- **Errors:** If enabled (checked), a notification will be issued to specified users should any errors occur during import
- **Warnings:** If enabled (checked), a notification will be issued to specified users should any warnings occur during import

Email notifications to

Specify the email addresses of any users who should receive error and/or warning notifications. By default the email address of the main Site Administrator will be populated in this field. Additional email addresses may be specified and should be separated by a comma.

▼ Notifications

Elements using default settings

Competency
Organisation
Position
User

Send notifications for

- Errors
- Warnings

Email notifications to

Schedule

If **Directory check** is specified as the method of file access, it is possible to schedule HR import to check the files directory periodically and process any CSV files that are available for import.

Elements using default settings

This area lists which **Elements** (Job assignment, Organisation, Position, User and/or Competency) are using the default **Schedule** settings.

Scheduled HR importing

If enabled the scheduled HR import cron task will import any CSV files that are available in the files directory (as specified in the **Files directory** field) when it's due to run.

Schedule (server time)

Here you can specify how often HR import should be checking the files directory and importing CSV files.

The available options are:

- **Daily:** When selected, it is possible to specify the hour that HR import checks the files directory for import.
- **Weekly:** When selected, it is possible to specify the day of the week that HR import checks the files directory for import.
- **Monthly:** When selected, it is possible to specify a date within the month that HR import checks the files directory for import.
- **Every X hours:** When selected, it is possible to specify how often in hours HR import checks the files directory for import.
- **Every X minutes:** When selected, it is possible to specify how often in minutes HR import checks the files directory for import.

▼ Schedule

Elements using default settings

Competency
Job assignment
Position
User

Scheduled HR importing

Disable
 Enable

Schedule (server time)

Every X hours 00:00 Sunday 1st 1 1

Save changes

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.

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