



Edge Import Employees & OUs

Loads and Feeds

Edge Import is a robust, intuitive data load tool that enables customers to manage their data loads in a self-service manner. With Edge Import, customers have the ability to map, validate and load data into their Cornerstone application using flat files. Customers can also set up data feed to automatically load these flat files such as employee or transcript data from an external system into the Cornerstone application.

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Overview

The screenshot shows the 'New Load' interface. At the top, there is a breadcrumb 'Loads > New Load'. Below it is the title 'New Load' with a help icon and the text 'What is this?'. The 'Category and Type' field is set to 'Employee CHR'. The 'Configuration' field shows 'No configurations available' with a dropdown arrow, and there is a 'New Configuration' button. The 'Key' field is 'Select a Key' with a dropdown arrow. The 'Select File' field is a large dashed box with the text 'Drag and drop to upload or' and a 'Pick a File' button. At the bottom left of the dashed box, there is a link 'or load a file from FTP'.

Edge load and feed types can be enabled for all clients who have migrated from Data Load Wizard (DLW) load and/or feed or purchased Edge Import by contract.

Edge Import Employee & OU Loads and Feeds makes it possible to import your employee, group, and organizational unit hierarchy data directly into your Cornerstone portal, when you want and how you want. This guide will go through the specifics of the Edge Import Employee & OU Loads and Feeds.

A complete list of other available loads and feeds can be found in [Cornerstone CSX Online Help](#).

If you have not already setup Edge Import in your Cornerstone CSX portal or are ready to create a new Edge Import Employee & OU Loads and Feeds, please reference the [Edge Import Starter Guide](#).

Data load types

This guide provides an overview of the available load types within the **Employees and OUs** category of Edge Import.

When performing data loads, it is important to remember that more comprehensive information related to usage and formatting considerations, field mapping, and requirements can be found on the template of each load type.

Field Name	User ID*	Local System ID	Prefix	First Name*	Middle Name	Last Name*	Suffix	Username	Approver
Field Type	Text	Text	Text	Text	Text	Text	Text	Text	
Required/Optional	Required	Optional	Optional	Required	Optional	Required	Optional	Optional	Optional
Conditionally Required									
Acceptable Values	Min Length: 1, Max Length: 100	Min Length: 1, Max Length: 100	Max Length: 10	Min Length: 1, Max Length: 200	Max Length: 200	Min Length: 1, Max Length: 200	Max Length: 10	Min Length: 1, Max Length: 128	Min Length: 1
Default Value									
Field Description	Unique identifier for the user	Specify the User Id from a third party vendor that needs to be maintained in Cornerstone	Prefix	First Name	Middle Name	Last Name	Suffix	Username	Approver
* This field is required									
# If this field is mapped, other fields will become required									
This file was generated at: 1/16/2020 2:56:00 PM UTC									

Employee data load

Permission to perform this load: Access CHR - Employee Load

The Employee data load is used to create, update, and inactivate user records for your organizations employees.

All records created will appear in the User Record Administration. Employee loads can update the following sections of the User Record: Personal data, Organizational data, Settings, Contact data, Employment data, Relational data, and Employee Custom fields.

When creating an Employee configuration in Edge Import will be able to choose from the following primary identifiers for your records:

- **User ID** - This can be used for creating or updating employee records. User ID's will not be created automatically, and will have to be mapped and provided in the load data file.
- **GUID** - The GUID (or Global Unique Identifier) is a back-end ID created by Cornerstone for each user in the system. Currently the GUID is only accessible using reporting with the field "User GUID" in Reporting 2.0. The GUID is commonly used as a primary identifier when bulk updating User IDs and Usernames (that cannot be updated in mass otherwise). Unlike the User ID, the GUID can never be updated. The GUID option in Edge Import will allow you to create and update users in the system using the GUID.
 - To **update** a user, provide the existing GUID for that user.
 - To **create** a user, leave the GUID field blank and the system will auto-populate a GUID for that user upon processing.
- **GUID (Update Only)** - This option is used to only update existing users within the system by providing their GUIDs. Blank records will be invalidated.

All new employee records will be assigned the default corporate password ([when configured](#)).

As a Best Practice, users should be required to reset their passwords upon initial login through a setting in Password Preferences.

Considerations

- Each row of the Employees file load will associate to a unique user record.
 - If duplicate primary identifiers are provided - the first record will be loaded and the other records will error
- To automatically inactivate users not present in a scheduled feed (this option is not available for one-time loads), the following settings must be true:
 - A user record must have the **Allow Reconciliation** value set to true
 - The **Inactivate employees not present in the file?** setting in the Edge Import Configuration is set to **Yes**.

A backend reconciliation threshold is set as a safety precaution, to prevent an error from removing too many users in the case of an incomplete file. The default

threshold is set to 10%, but can be changed by request to Global Custom Support.

- Reconciliation only affects the inactivation of users, not the editing. For example, if you wish to update the Division OU of more than 10% of your users, the threshold will not activate or prevent these changes.
- Employees can only be loaded to a User Status Active or Inactive. No other status is an acceptable value (though yes/no/true/false may be used in place of active/inactive). Active is the default value if the field is left blank. User's may be marked Absent using a separate field in the template.
- Some organizations may see Conditionally Required fields in their Employee templates. Conditionally Required refers to fields that when mapped or used will require other fields that might not be otherwise required. Conditionally Required fields can be found listed on the first tab of the template.
- If the Username is not specified in a feed file, the User ID value will be applied to the Username.

Active Period (for non-CHR customers)

On the user record of non-CHR customers, the Active Period allows you to set the Activation Date and Deactivation Date to set a date range, during which the user record is active. After the Deactivation Date has passed, the user record will turn inactive.

In Edge Import you may choose to set either the **Status** field OR an **Active Period** (using both Activation Date and Deactivation Date fields).

- An error will occur if you include values in both Status and the Activation Date and Deactivation Date fields.
- To use Active Period, both the Activation Date and Deactivation Date fields are required. Including only one will result in an error.

Applicant converted to Employee

If the **Recruiting** platform is active in your portal, when creating an Employee configuration in Edge Import, you will be able to select the **Do you want to convert applicants to employees?** option.

This option is set to No by default. When this option is set to Yes, the load will process employee and applicant records, and any applicants included in the load file are automatically converted to employees. When this option is set to No, the load will only process employee records, and any applicants included in the load file will return an error message. Applicants can be identified by providing either their User IDs or GUIDs (which may be found using Reporting 2.0's Applicant User fields.)

Organizational Unit data loads

Permissions to perform OU loads are specific to the OU type:

- Access Edge Import Workflow - Division
- Access Edge Import Workflow - Location
- Access Edge Import Workflow - Cost Center
- Access Edge Import Workflow - Grade
- Access Edge Import Workflow - Legal Entity
- Access Edge Import Workflow - Position
- Access Edge Import Workflow - Custom OU

Organizational Units (OUs) form the foundational basis of your Cornerstone platform. Connecting and constraining system functionality to the users that are associated to each OU.

The Organizational Unit data loads will allow you to create new OUs, edit the data of existing OUs, set the values of OU custom fields, and load translations to localize text fields related to Organizational Units.. Users may be associated to these loads using the Employee data load.

- If creating new OUs in a scheduled feed, you may associate these OUs to a user record in the same feed they are created in.

The following OUs come standard with your Cornerstone platform, and can have load types available within Edge Import:

- **Division**
- **Location**
- **Cost Center**
- **Grade**
- **Legal Entity**
- **Position**

It is also possible for users with the correct permissions to [create their own organizational units](#), Edge Import feeds for these **Custom OUs** are also supported.

Considerations

- While each OU load type may have different optional and required fields, OU ID and OU Name are always required for any OU load.
- The OU ID must be unique within the same OU type.
- Each row of an OU file load will associate to a unique record of that OU type.
 - If duplicate identifiers are provided - the first record will be loaded and the other records will error

- To automatically inactivate OUs not present in the file, the following settings must be true:
 - The OU record must have the **Allow Reconciliation** value set to true
 - The **Inactivate OUs not present in the file?** setting in the Edge Import Configuration is set to **Yes**.

A backend reconciliation threshold is set as a safety precaution, to prevent an error from removing too many OUs in the case of an incomplete file. The default threshold is set to 10%, but can be changed by request to Global Custom Support.

Group data loads

Permissions to perform OU loads are specific to the OU type:

- Access Edge Import Workflow - Group OU

The Group data loads are divided into two separate load types:

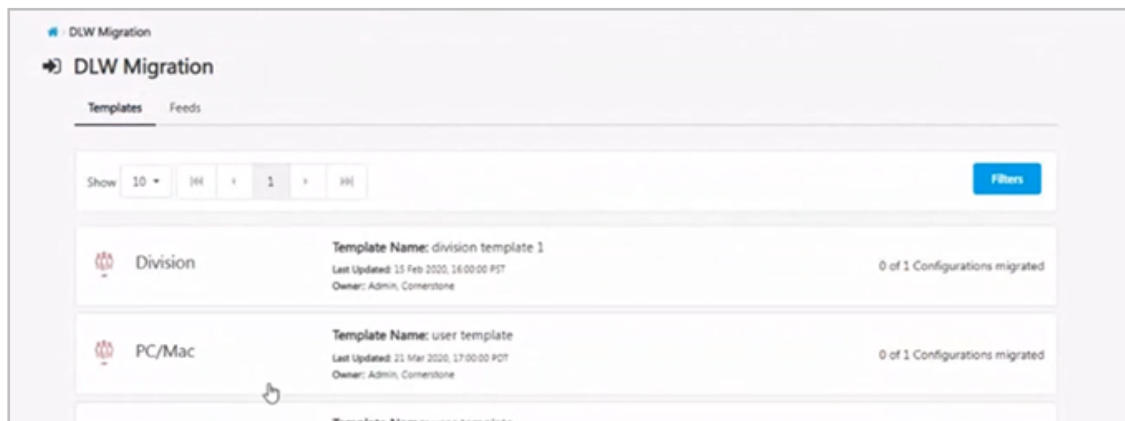
- **Groups** - This load allows you to create new groups and update existing groups. It is not designed for managing group memberships. For adding or removing users from a group please use the Group Membership load.
- **Group Membership** - Assign groups to users or remove users from existing groups, either created via the portal UI or Edge Import.

Group Membership loads can only be used to upload lists of specific users based on their User IDs. Dynamic criteria is not supported at this time. The **User Action** field allows you to specify whether to add the user to the group or remove them.

Appendix

Migration from DLW

The DLW Migration tool makes it easy to transfer your existing feeds and templates from the Data Load Wizard (DLW) to Edge Import. From the Home page of Edge Import, select the DLW Migration option.



The DLW Migration page is divided into the Templates and Feed tabs, each listing their respective DLW configurations. Selecting the options in these tabs will open a flyout that lets you select which templates you would like to import into Edge.

Configurations and Feeds in Edge Import that were migrated from DLW will be flagged to let you know where they originated.

Some considerations to keep in mind:

- Only active DLW feeds can be migrated to Edge Import.
- Only templates that meet one of the following conditions will be available to migrate to Edge Import:
 - Template has been used at least once in the last 90 days OR
 - Template is used in an active DLW feed
- If a DLW template has multiple equivalent loads in Edge Import, the user will be presented a choice to migrate the template to each one of the corresponding configurations in Edge Import. For example, in the DLW, there's only one transcript load. However, in Edge Import there are six transcript loads. In such cases, the user will have the option to migrate the template to any or all of the six Edge Import configurations.
- A user can only migrate templates for which they have the corresponding permissions in Edge Import. For example, a user must have the 'Access CHR - Employee Load' permission to migrate User DLW templates to Employee Edge Import configuration.
- A user can only migrate templates and feeds for which there are corresponding Edge Import loads and feeds respectively. For example, a user will not be able to migrate a Requisition template to Edge Import.

Frequently Asked Questions (FAQs)

Select this [link](#) to access Frequently Asked Questions related to Edge Import in the Knowledge Central.