cornerstone

Edge Import Recruiting
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.

Cornerstone Edge Import CSX

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Overview

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.

With Edge Import Recruiting you can load:

- The **Employee** load type option **Do you want to convert applicants to employees?** lets you convert hired recruiting applicants to employee user accounts.
- **Edge Import Recruiting Loads and Feeds** makes it possible to create and update your requisitions tremplates in bulk.
  At this time:
  - *Requisition templates created in the portal UI cannot be updated using Edge Import.*
  - *Feeds and Bulk API are not supported but are targeted for a future release.*

Data load types

This section of the guide provides an overview to help you get started with:
- **Requisition Template** load type within the **Recruiting** category
- Using **Do you want to convert applicants to employees?** option of the **Employee** load type

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.

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 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.)

Requisition template data load

Permission to perform this load: Access REC - Requisition Template Load

Create and update requisition templates for Recruiting in bulk using scheduled data feed and manual loads.

Considerations

- Each row of the 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
- Internal Workflows and External Workflows must be already created in the portal, each workflow is provided with an ID that can be found in the corresponding tab in the data load Template.
  - External Workflows are required
  - Internal Workflows are optional, if not included the External Workflow will default.
- In your file, it is possible to provide a .txt file for your internal and external Job Ads. This .txt file will need to be present on the CSOD FTP site, the load will fail for the records where the file attachment is missing.
  - Files will need to be dropped to the **ATS/JobAds** subfolders.
  - Provide the exact file name (eg BusinessAnalayst.txt). The maximum file size supported is 5MB.

- Requisition templates with a Reference ID can be updated with Edge Import. This means that any template created through Data Load Wizard can be updated from Edge Import as long as the customer has the Reference ID used when creating the template. This information can be downloaded from Reporting 2.0.
- Feeds and Bulk API are not currently supported. This will be addressed in a future release.
- Translation loads for requisitions are currently not supported. This will be addressed in a future release.

Appendix

FTP access

User's within the System Administrator security role will be able to access the FTP account by following the below steps:

1. Navigate to Admin > Tools > Core Functions > FTP Account Access
2. Click Connect.
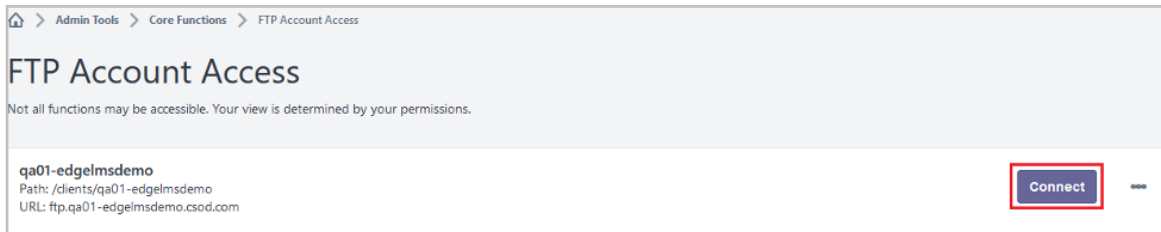
3. A pop-up message will appear indicating that you will be redirected to another site outside of your Cornerstone portal and advising you to disable pop-up blockers, click Continue.
4. After clicking continue, you will be taken to the CSOD FTP site (Web Transfer Client) in a new browser tab.
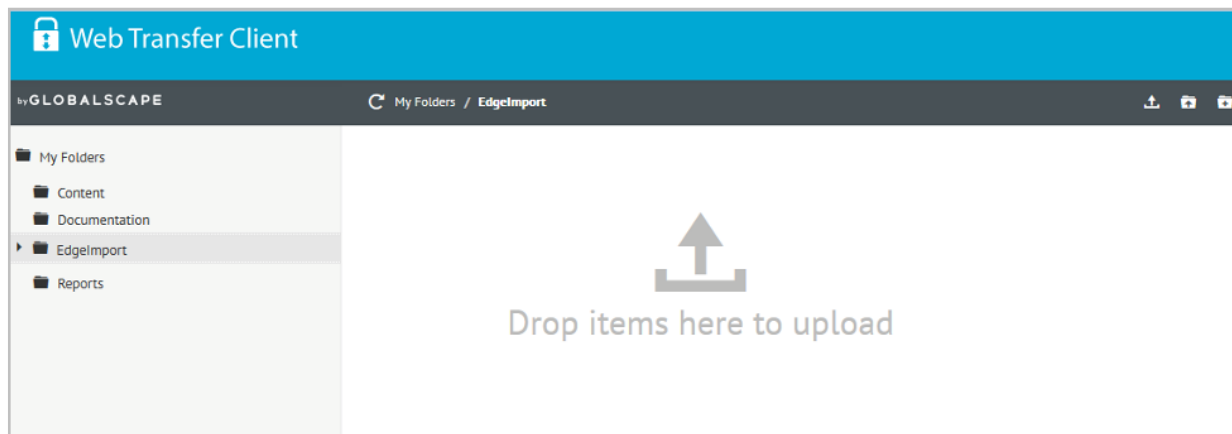
5. Select an existing folder by clicking on the folder name under My Folders in the left navigation panel or create a new folder by clicking on the New Folder icon.

After selecting the desired folder, drag and drop your file(s) into the main panel to upload to the FTP. Files can also be uploaded by clicking on the File Upload icon and browsing to the location on your system file explorer.

Review Online Help for more information about permissions and managing access to your Cornerstone-provided FTP directory.

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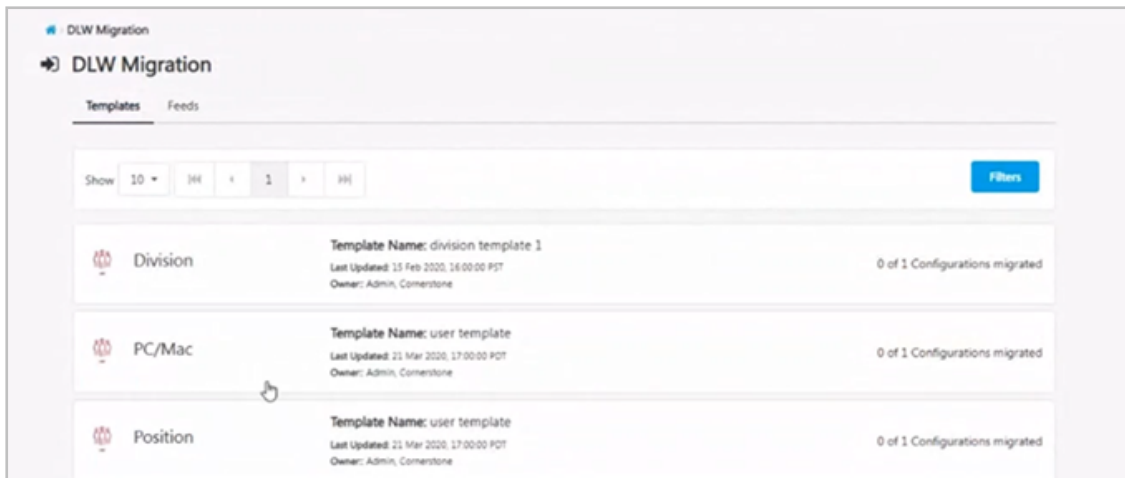
The DLW Migration page is divided into the Templates and Feed tabs, each listing their respective DLW configurations. Selecting the options in these tabs will open a flyout that lets you select which templates you would like to import into Edge.

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.