



# Edge Import: User & OU Loads Migration Guide



# Version history

	Date	Description
1.0	August 7, 2020	Original Version
2.0	September 23, 2021	Updated deprecation date to the May '22 release
2.1	October 6, 2021	Edge Import tiles merged into a single tile
3.0	September 2, 2022	Applicant Conversion information included

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# Data Load Wizard

## What is the Data Load Wizard?

The **Data Load Wizard (DLW)** is **Cornerstone's legacy data import tool**, processing files from customers' HRIS tools to create the User and Organizational Unit hierarchies within the Cornerstone portal. Files are dropped to the FTP and imported based on a set schedule.

Though often, customers will not have visibility to their DLW, there are some important features of their feeds that will be good to know when migrating to the new **Edge Import** data import tool.

**The DLW Users and OU data loads and feeds functionality will be deprecated with an end-of-life in the February '23 Release, replaced by Edge Import data load tool.**

Please select template and file name for each type

Feed Name:

Type	Template	File Delimiter	File Name	Include	Auto-deactivate	Blank Overwrite
Users	<input type="text" value="User (051020 - ellucian) (Admi"/>	TAB	<input type="text" value="corerstone_user.txt"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cost Center	<input type="text" value="Cost Center (Admin, Service Te"/>		<input type="text" value="corerstone_costcenter.t"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Division	<input type="text" value="Division (Admin, Service Tech)"/>		<input type="text" value="corerstone_div.txt"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grade	<input type="text" value="Grade (Admin, Service Tech) ("/>		<input type="text" value="corerstone_grade.txt"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Location	<input type="text" value="Location (Admin, Service Tech)"/>		<input type="text" value="corerstone_loc.txt"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Position	<input type="text" value="Position (Admin, Service Tech)"/>		<input type="text" value="corerstone_pos.txt"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Advanced Settings**

International Date Format

Do not allow relationships with inactive Users and OUs:

Enable Results Log Email Notifications:

Notify on no files received:

Results Log Recipients:  [Add](#)

Scheduled Feed Time: Unavailable

PGP encryption:  [Download Public PGP Key](#)

# DLW deprecation

The ability to perform Users and OU data loads and feeds using DLW began deprecation in the May '22 Release for most customers. Some customers were excluded from the May '22 deprecation schedule due to missing feature parity in Edge Import. Most of the missing parity features those customers were dependent on are available in Edge Import with the August '22 Release.

**All Data Load Wizard User and OU loads and feeds will be deprecated with the February '23 Release.** Migrations to Edge Import will need to be completed before this time.

**There are several challenges to be aware of during this migration and deprecation process:**

- Many clients had their IT resources work with 3rd party vendor teams to establish their DLW configurations, leading to a lack of knowledge transfer and nonexistent documentation
- Highly customized based on clients HRIS, Org Unit hierarchy and custom fields – CSOD instructions give guidelines but cannot be customized to each situation
- Because it is rare for a client to have access to their DLW feeds, some clients are unsure if they are impacted by the deprecation.

**However, it is important to bear in mind:**

- For most clients, the process already designed from the HRIS perspective will not need to change. Files will still be placed in the CSOD FTP in the same folder at the same time of day. Edge Import can be configured to process these files similar to how they were processed in the DLW.
- Within Edge Import, a migration tool has been created to make the task of migrating easier for clients.

# Understand your DLW feed mapping

When creating your Edge Import feeds, it is important to understand how the data you send over within your HRIS files are mapped to fields within Cornerstone. This will allow you to account for any differences that Edge Import may have. DLW allows you to view and download a spreadsheet to view the configuration.

To find this mapping, follow these steps:

1. From the **Feed Configuration** page (Admin > Tools > Core Functions > Data Load Wizard > Feed Configuration)
2. Here, you can find the name of the **template** currently mapped to your DLW user feed files.

Type	Template	File Delimiter	File Name	Include	Auto-deactivate	Blank Overwrite
Users	User (051020 - ellucian) (Admi	TAB	cornerstone_user.txt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cost Center	Cost Center (Admin, Service Te		cornerstone_costcenter.t	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. Next, navigate to the **Manage Templates** page (Admin > Tools > Core Functions > Data Load Wizard > Manage Templates)
4. Here, you may search for the template we have just seen on the Feed Configuration page, remember to uncheck the Display My Templates Only checkbox to search all of your organizations templates.
5. From the **Details** column, choose whether to Preview your template mapping in a separate pop-up or Export to Excel to save and open a .xls version of the mapping.



If you do not have access to templates, the mapping will be shown when the migration is started in Edge Import.

Matched Fields	
Extensions	
System Fields	Matched Fields from File
Absent	
Active	
Address Line 1	
Address Line 2	
Allow Reconciliation	Allow Reconciliation
Approver ID	
As of Date	
City	
Compensation Currency	
Cost Center ID	Cost Center ID
Country Code	
Division ID	Division ID
Eligible for Rehire	
Email	
Email Digest	
Employment Status	
Ethnicity	
Exempt	
Fax	
First Name	User First Name
Former Intern	
Gender	
Grade ID	Grade ID

# Understand your DLW feed settings

The DLW Feed Configuration page (Admin > Tools > Core Functions > Data Load Wizard > Feed Configuration) contains several settings that are important for you to be aware of when you begin your transition to Edge Import. Edge Import will have similar settings, so you will want to configure your new feed to match your prior DLW settings.

Please select template and file name for each type

Feed Name:

Type	Template	File Delimiter	File Name	Include	Auto-deactivate	Blank Overwrite
Users	<input type="text" value="User (051020 - ellucian) (Admi"/>	TAB	<input type="text" value="corerstone_user.txt"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cost Center	<input type="text" value="Cost Center (Admin, Service Te"/>		<input type="text" value="corerstone_costcenter.t"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Division	<input type="text" value="Division (Admin, Service Tech)"/>		<input type="text" value="corerstone_div.txt"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grade	<input type="text" value="Grade (Admin, Service Tech) ("/>		<input type="text" value="corerstone_grade.txt"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Location	<input type="text" value="Location (Admin, Service Tech)"/>		<input type="text" value="corerstone_loc.txt"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Position	<input type="text" value="Position (Admin, Service Tech)"/>		<input type="text" value="corerstone_pos.txt"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Advanced Settings**

International Date Format

Do not allow relationships with inactive Users and OUs:

Enable Results Log Email Notifications:

Notify on no files received:

Results Log Recipients: [Add](#)

Scheduled Feed Time: Unavailable

PGP encryption:  [Download Public PGP Key](#)

- **Template:** the name of your active template will be useful when selecting which templates to migrate from DLW to Edge Import.
- **File Name:** know your file names, when creating a configuration in Edge Import, you can direct the importer to the exact file you wish to target from your FTP.
- **Auto-deactivate:** This option determines if the feed is able to deactivate users and OUs that are not in the data feed. *For this function to work, the individual User/OU will need to have the Allow reconciliation field enabled.*
- **Blank Overwrite:** This setting determines if a blank value in the data file will result in a blank value in the corresponding field in the Cornerstone system. If unchecked, a blank value will be ignored and no change will occur.
- **Do not allow relationships with inactive Users and OUs:** Prevents OUs and users from being associated with inactive OUs or users.



If you do not have access to these settings, Cornerstone's Global Customer Success team can provide this information to you.

# Terminology changes from DLW to Edge Import

When migrating to Edge Import from DLW, similar functionalities will appear with different names. It is important to understand these changes to common terms to help avoid any confusion during migration.

## Data Load Wizard Configure Feed Settings

Type	Template	File Delimiter	File Name	Include	Auto-deactivate	Blank Overwrite
Users	User (051020 - elucian) (Admin, Service Tech)	TAB	cornerstone_user.txt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cost Center	Cost Center (Admin, Service Tech)		cornerstone_costcenter.txt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Division	Division (Admin, Service Tech)		cornerstone_div.txt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grade	Grade (Admin, Service Tech)		cornerstone_grade.txt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Location	Location (Admin, Service Tech)		cornerstone_loc.txt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Position	Position (Admin, Service Tech)		cornerstone_pos.txt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Advanced Settings**

- International Date Format:
- Do not allow relationships with inactive Users and OUs:
- Enable Results Log Email Notifications:
- Notify on no files received:
- Results Log Recipients:  Add
- Scheduled Feed Time: Unavailable
- PGP encryption:  Download Public PGP Key

## Edge Import Employee Configuration Option

**Employee Questions**

1. What is the primary identifier?  
 User ID  GUID  GUID (Update Only)  User ID (with Auto-generation of ID's)
2. Inactivate employees not present in the file?  
 Yes  No
3. Can employees be assigned to inactive Organizational Units?  
 Yes  No
4. Can User Relations accept inactive Users?  
 Yes  No
5. Do you want to convert applicants to employees?  
 Yes  No
6. What should we do with blank values?  
 Apply default value  Do Nothing
7. What culture should be used as a default?

### Auto-deactivation



### Inactivate employees not present in file?

### Blank Overwrite



### What should we do with blank values?

### Do not allow relationships with inactive Users and OUs:







### Can employees be assigned to inactive Organizational Units?






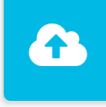
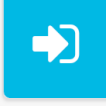
### Can User Relations accept inactive Users?



## Data Load Wizard home page options

-  **Manage Templates**  
Review and organize the templates for all data load file types.
-  **Load Data**  
Load a file containing data to virtually any part of the system.
-  **Configure Feed**  
Design the User / Organizational Unit inbound datafeed by combining pre-saved templates for each file.
-  **Track Data Loads**  
Review the status of all data loads. Finalize your data load into the system.

## Edge Import home page options

-  **Configurations**  
Create and manage Options & Mappings
-  **Loads**  
Initiate and review one time data imports
-  **Feed Settings**  
Create and manage scheduled imports
-  **Feed Runs**  
View the results of scheduled imports
-  **Key Management**  
Generate and manage encryption keys
-  **Bulk API History**  
View the history of imports performed via Bulk API
-  **DLW Migration**  
Migrate your DLW templates and feeds into Edge Import
- New to Edge Import?**  
[Get a Template Guide](#)

**Provides a templated format for each load type, including required fields, formats, and lists of acceptable values.**

# Getting Started with Edge Import

## Step 1. Request a Copy Down

**Though completely optional, it is recommended that before you begin your migration, you test in either you Stage or Pilot environments before moving to Production.**

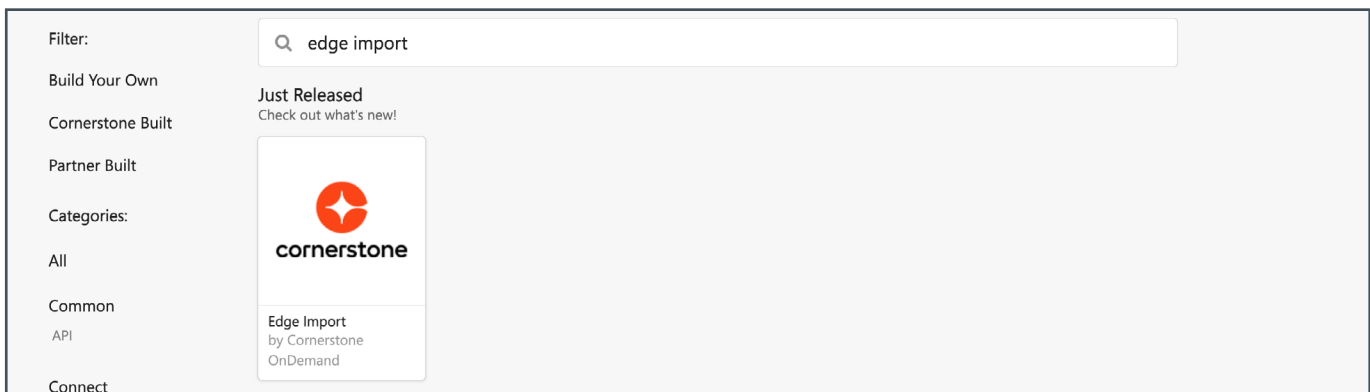
A copy down is the process for copying configuration and data from your Production to Stage or Pilot environments OR from Pilot to Stage environment.

Stage is the recommended environment for Edge Import migration testing, as this will be the closer of the two to your live data.

**Annual copy downs are complimentary**, and it will greatly simplify the testing process if the data is current. If unsure when the last copy down was performed, GCS can check copy down and schedule one.

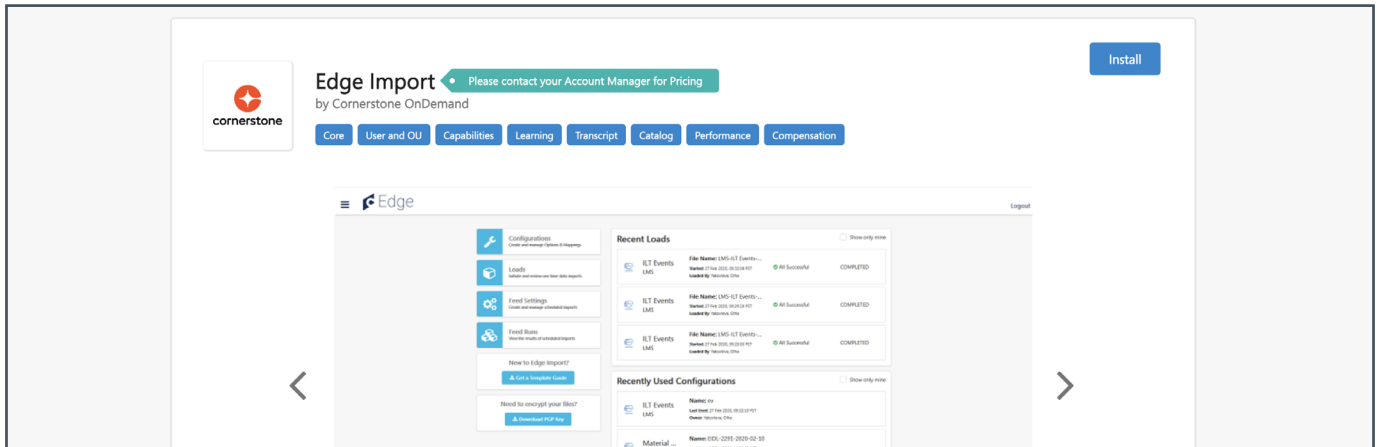
## Step 2. Enable Edge Import in Stage

1. Log into your Cornerstone Stage portal as a System Admin.
2. Navigate to the **Edge Marketplace** (Admin > Tools > Edge > Marketplace).
3. Search for **Edge Import** then click on the Edge Import tile.



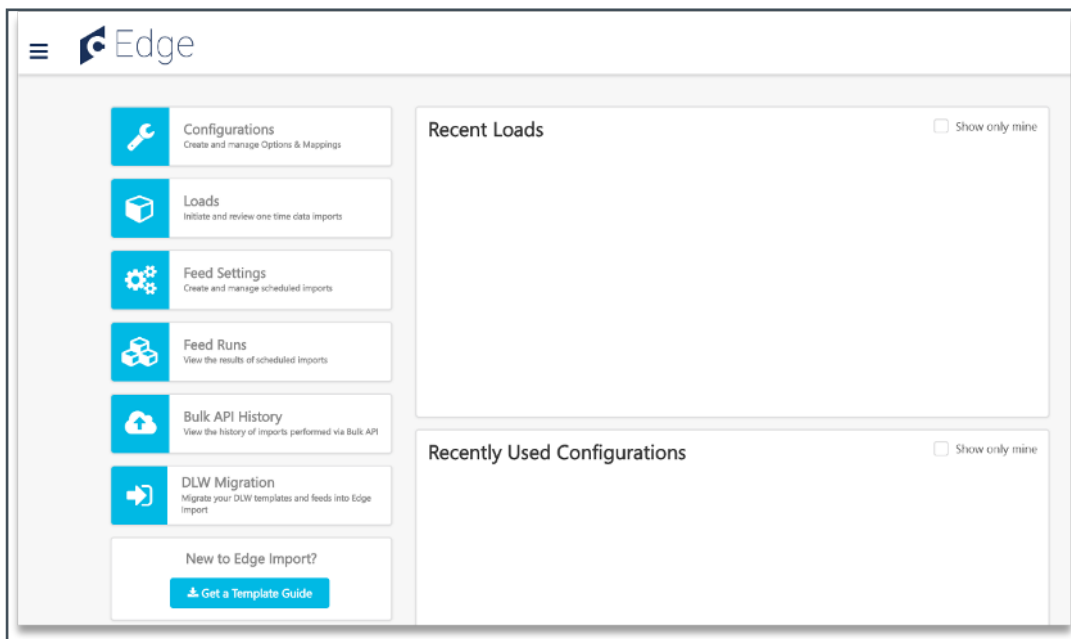
**If the Edge Import tile already Installed/Purchased, you may skip to page 7.**

4. Click **Install** to review the **Terms and Conditions**.



5. Select the checkbox **I have read, understand and agree to the terms and conditions above**, then click **Install**.

6. Click on **Edge Import** in the confirmation message. You should be taken to the Edge Import landing page.



Edge Import in your Stage and Pilot environments is free to enable without charge or contract.

For your Production environment, for any questions related to contract or pricing, please contact your Account Manager

## Step 3. Configure Security Roles

**Edge Import security permissions are automatically assigned to the System Administrator role**, however, you may find it necessary to assign them to further security roles for your team members.

### **Edge Integrations - Manage**

Access to Edge Integrations

### **Edge Marketplace - Manage**

Access to Edge Marketplace

### **Access Edge Import**

Allow access to Edge Import

### **Create/Update Configurations**

Grants ability to create and update data load configurations

### **Delete Configurations**

Grants ability to delete configurations

### **Set up Feed**

Enables administrator to access Feed Settings to create/update feeds and schedule feed runs.

### **Manual Run Feed**

Grants ability to check files in FTP and run feed manually.

### **Enable/Disable Feeds**

Grants ability to activate or deactivate Feeds from running as per Schedule in Feed Settings.

### **Access CHR - Employee Load**

Grants ability to access load reports and perform Employee data load

### **Edge Import - Employee Load Constrained**

Constrain an administrator's ability to load employee data. Administrators can only load employee data if the employee is within the constraints on this permission.

### **Access Edge Import Workflow - Division**

Allow access to loading Division in Edge Import

### **Access Edge Import Workflow - Location**

Allow access to loading Location in Edge Import

### **Access Edge Import Workflow - Cost Center**

Allow access to loading Cost Center in Edge Import

### **Access Edge Import Workflow - Custom OU**

Allow access to loading Custom OU in Edge Import

### **Access Edge Import Workflow - Grade**

Allow access to loading Grade in Edge Import

### **Access Edge Import Workflow - Legal Entity**

Allow access to loading Legal Entity in Edge Import

### **Access Edge Import Workflow - Position**

Allow access to loading Position in Edge Import

### **Access Edge Import Workflow - Group OU**

Allow access to Edge Import Group Workflow

# Recommendations and Considerations

1. Once Edge Import is activated for a portal, you can create Configurations in Edge Import for employee and OU loads. However, you cannot load any data until the corresponding user/OU loads and feeds in the DLW are disabled.
2. Once you disable the DLW in a portal, **it cannot be re-enabled**. Clients are strongly encouraged to test and validate employee and OU loads/feeds in Edge Import in their Stage portals first. Only after you have completed testing in Stage, should you proceed with performing the migration steps in Production.
3. Stage should be used for testing because its best mimics the resource capacity of Production.
4. Only DLW feeds that are active can be migrated to Edge Import using the migration tool.
5. Only DLW templates that have been used at least once in the last 90 days or are in an active DLW feed can be migrated to Edge Import using the tool.
6. 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 configurations.
7. Ideally work with your HRIS team to provide test files from production at the time of copy down. Use these files as your basis for testing.
8. Most clients do not have access to see the configurations of the feed. If this is needed, GCS can provide. Template maps can be downloaded for most clients if they have access to DLW today under their top System Admin user
9. For in-depth documentation of employee/OU loads in Edge Import, please see the [Starter Guide](#).

# Migration plan summary

This section summarizes the high-level steps to enable you to plan the migration activities and schedule. Details for each of the steps listed in the plan are provided in the Migration Plan Details section that follows.

## 1. On Stage

- a. Enable Edge Import through the Edge Marketplace. It's free to use in Stage and Pilot.
- b. Use the DLW Migration Tool to migrate your DLW templates.
  - You may want to schedule a copy down from Production to Stage so that you can best mimic the setup in Production in terms of the DLW templates and feeds that are currently in use within your organization.
- c. Execute Validate Only scenarios using the migrated templates and review the results. Validate Only is a feature in Edge Import where you can have the system perform most validations but not load the data.
- d. Use the DLW Migration Tool to migrate your active DLW user/OU feeds.
  - If you are not sure whether you have any active DLW user/OU feeds, navigate to the Edge Import homepage > DLW Migration > Feeds. If you see any user/OU feeds listed here, that means your organization currently has some active user/OU feeds in the DLW.
- e. If there are other teams in your organization who manage user/OU data loads and feeds, train these teams to use Edge Import. They won't be able to load data until the DLW is turned off, but at least they can get oriented with the tool and its workflows.
- f. Use the DLW Migration Tool to permanently disable the User/OU loads and feeds in the DLW
- g. Conduct testing and validate results. This time you will be loading data (as opposed to just doing validate only scenarios) and verifying results of the load. Suggested test cases included in Appendix.

## **2. On Production**

- a. Purchase and enable Edge Import
- b. Use the DLW Migration Tool to migrate your DLW templates and feeds
- c. Use the DLW Migration Tool to disable the User/OU loads and feeds in the DLW
- d. Enable your employee/OU feed in Edge Import

# Migration plan details

When you are ready to begin your migration, navigate to the Edge Import homepage (Admin > Tools > Edge > Imports and Feeds).

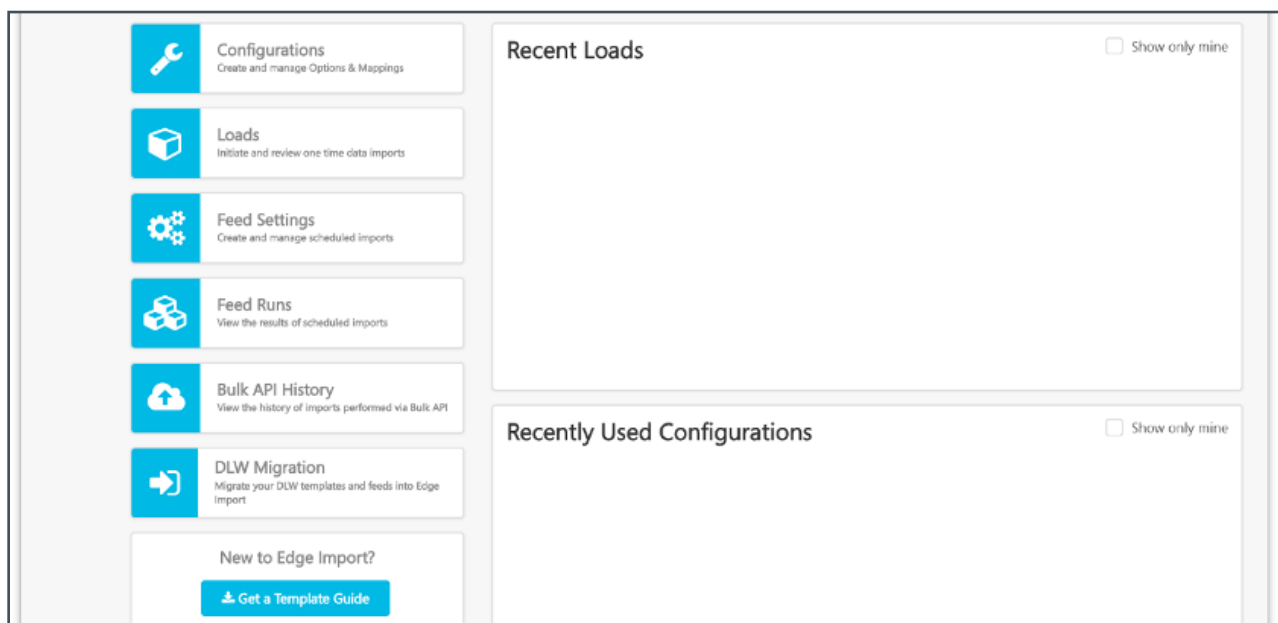
In Edge Import you can migrate both your **Templates** and **active Feeds**.

Only templates that have been used at least once in the last 90 days or are in an active DLW feed can be migrated to Edge Import.

## Migrate Templates to Configurations

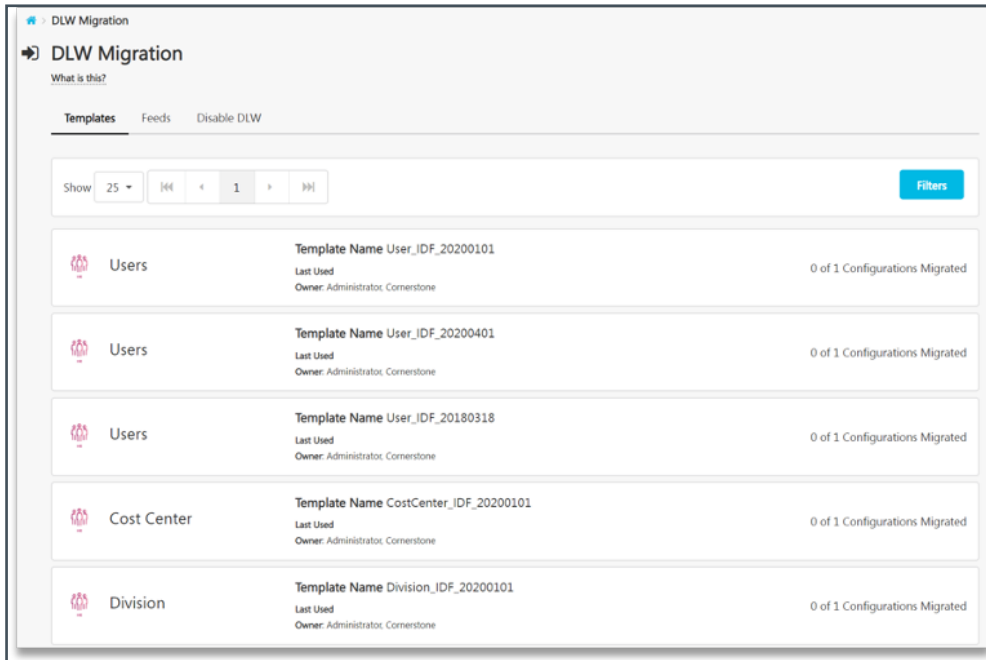
In Edge Import, your DLW Templates will be recreated as Configurations. These Configurations can be used to quickly setup one-time Loads and Scheduled Feeds. **Once migrated, your configurations can be viewed from the Configurations tab**, where you can also **create new configurations** for any future updates to your feed. These configurations can then be added to new feeds (using the Feed Settings) or as one-time data loads (using the Loads)

1. On the Edge Import homepage, click on the **DLW Migration** button.



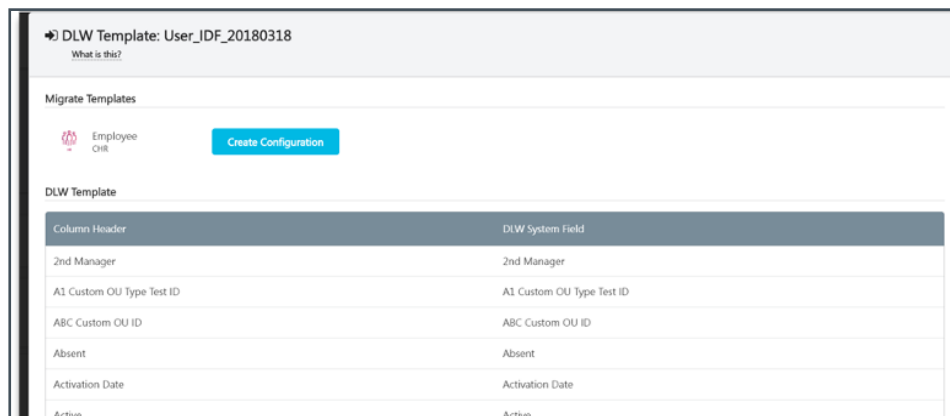


- On the **Templates** tab, you can see the list of DLW templates that have been used in the last 90 days or are used in an active DLW feed. Click on a template to view details, including the field mapping, and begin process to migrate the templates to Edge Import.



By default, this tab only displays templates that have a corresponding load in Edge Import. For example, when you initially land on this page, you won't see any Recruiting DLW templates because those loads are not available in Edge Import yet. If you are curious, you can see these unavailable templates by clicking on Filter > Select 'No' for 'Only display migratable templates' > Click 'Apply'.

- You can utilize the Filters button to filter templates by title.
- Select any template to see the DLW field mapping.
  - Note that you will only see the field mapping for fields that are mapped in the DLW. For example, if your template file in the DLW contains 20 fields, but only 10 of them are mapped, you will only see those 10 fields on this page.



5. Click **Create Configuration** to start the migration process.
6. Complete each step of the New Configuration Wizard to migrate the DLW Template to Edge Import.
  - a. In the **Options** step, you will need to select the options that apply to your template. These options vary by load type and might be different from what you are used to seeing in the DLW. To learn more, click on each option.

Customers utilizing GUID or applicant conversion for their User/Employee load, should read through the Considerations for GUID and Applicant Conversion before proceeding to understand the correct configurations to select.

The screenshot shows the 'New Configuration' wizard in the 'Options' step. The progress bar indicates the current step is 'Options' (2), with 'Upload' (1), 'Mapping' (3), and 'Save' (4) following. The 'General Questions' section includes a dropdown for 'When an Excel file has multiple sheets, which one should we use?' set to 'Sheet1', and a radio button question 'Does your file have headers?' with 'Yes' selected. The 'Employee Questions' section includes a tooltip for 'What is the primary identifier?' pointing to 'User ID', a question about GUID usage, and two radio button questions about inactive users, both with 'Yes' selected.



Note that the 'When an Excel file has multiple sheet, the which one should we use' question is disabled. In the DLW, templates aren't associated with worksheet sheet names. You pick the work sheet name at the time of performing a load using a template. This behavior is different in Edge Import where in a sheet name must be associated with a configuration. As a result, templates migrated from the DLW will default to Sheet1.

This may impact you if you use .xls or .xlsx files for your loads. If your data in these files are not in Sheet1, you will need to rename your worksheet in Excel. If you use any other file type, this does NOT impact you.

- b. In the **Mapping** step, review the auto-mapped fields and update as necessary. At a minimum, the required fields must be mapped.
      - Within the Mapping page, the required unmatched fields display in the right-side column.
        - Fields that are required to be included will be noted with a red asterisk (\*).

- Fields with a red two-barred cross (‡) have a conditional requirement associated, meaning inclusion of this field will make other fields that were not already required become required.



Several fields have been renamed for Edge Import from their previous DLW iterations:

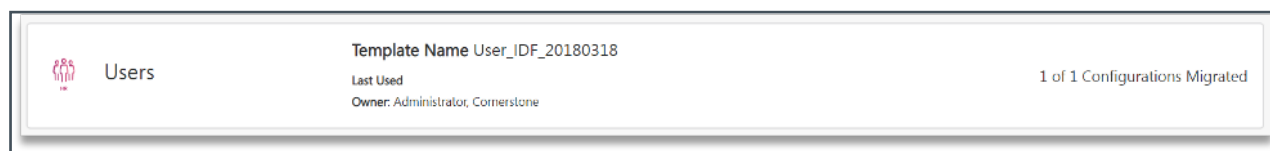
DLW Field	Edge Import Field	Summary
Active	Status	The Active field, used to activate or inactivate users is renamed to Status
Status	<Retired>	The legacy Status field was used to map Terminated, On Leave. However, CHR user fields were enabled for clients several years ago, Status has not been loading.
Time Zone	*	Using Edge, clients will need to use numeric IDs instead of alpha character (EST, PST, etc.) Numeric IDs can be found in the Edge Template for users– on the Time Zone tab.
Approver ID	Approver	ID dropped from name, but ID is still the expected value
Manager ID	Manager	ID dropped from name, but ID is still the expected value
Cost Center ID	Cost Center	ID dropped from name, but ID is still the expected value
Division ID	Division	ID dropped from name, but ID is still the expected value
Location ID	Location	ID dropped from name, but ID is still the expected value
Position ID	Position	ID dropped from name, but ID is still the expected value

- c. In the Save step, review the configuration name and update if necessary. The migration tool carries over the template name from the DLW.



In the Save step, you may get a warning message indicating that a duplicate configuration with the same mapping and settings already exists. This can happen if you or someone else in your organization has already created or migrated a configuration for the same load type with the same settings and field mapping. You can choose to ignore the warning message OR you can abandon the migration process and instead use the existing configuration for your loads.

7. Once you have completed migrating your DLW template, you will see a confirmation message. Your template will also indicate **1 of 1 Configurations Migrated**.



## Test Configurations

The next thing to do is to validate the migrated configuration in Edge Import. **Validate Only** is a feature in Edge Import where you can have the system perform most validations but not load the data. Note that Validate Only scenarios do not cover the following:

- Dependency resolutions such as
    - Employee relationships between users in the same file
    - OU relationships such as OU hierarchy or employee-OU relationships
  - Post-processing such as resolving employee addresses to geocoding, and setting default password for users. These steps only occur after the data is persisted.
1. Navigate to the **Loads** page (Admin > Tools > Edge > Imports and Feeds > Loads).
  2. Click **New Load**.
  3. In the **Category and Type** dropdown, select the load type for which you just migrated a template.
  4. In the **Configuration** dropdown, select the configuration that you just migrated.
  5. Upload a file and click **Validate Only**.
  6. Review the results of the load and confirm that they are along expected lines.

We recommend that you perform the **Validate Only** operation at least once for each load type you wish to migrate from the DLW. Until DLW is turned off the feeds / data in the files will NOT load / update the actual data in the portal, but will instead give warnings / errors as if they ran.



**Auto-deactivation** of users with Allow Reconciliation will continue even if Validate Only is selected and DLW is still enabled. Users will still be inactivated,

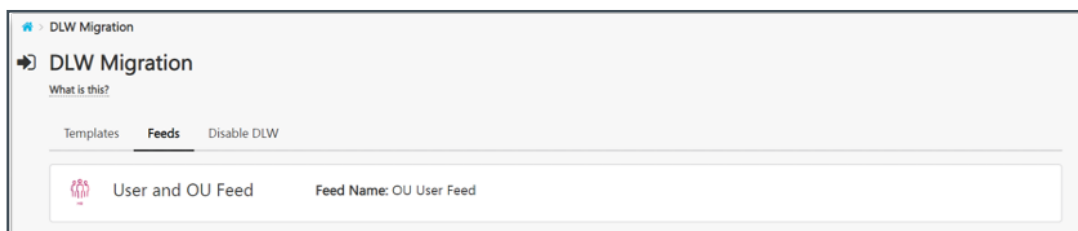
It is also recommended that you thoroughly test your settings with various user scenarios, ensure that users automatically deactivate and that blank values either come through as their defaults or nothing at all.

In the Appendix, you will find some useful test cases. We have provided these to you as guidance to get started with your validation efforts. We highly recommend that you expand on these test cases to include as many test scenarios as possible that apply to your organization.

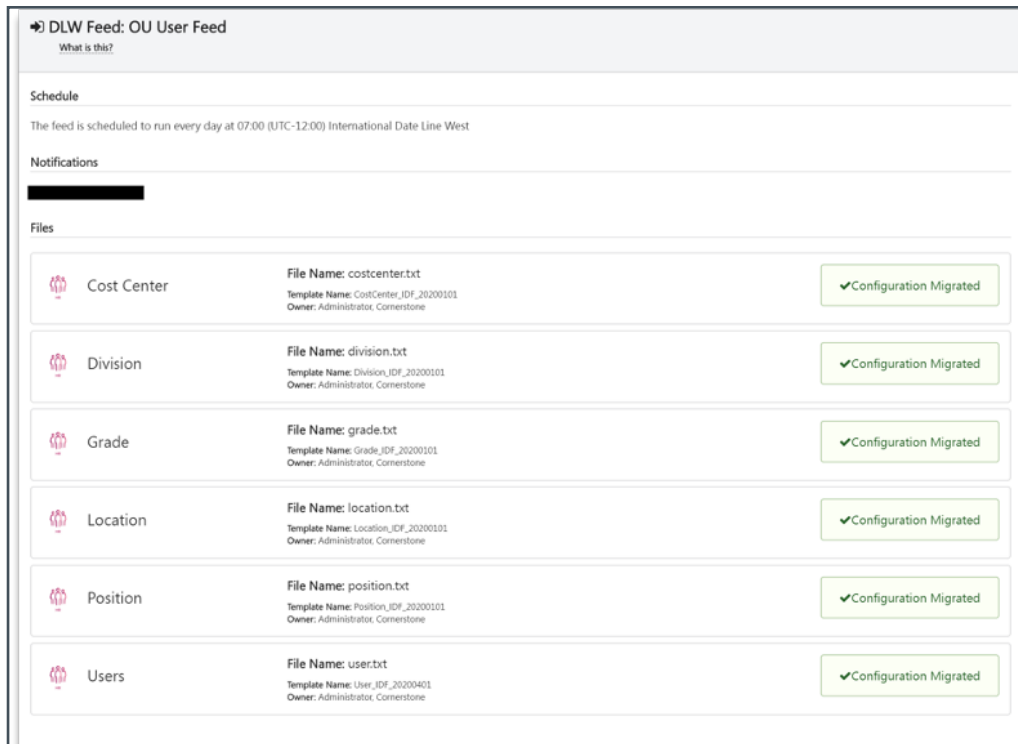
## Migrate Feeds

Once you are satisfied with the results of the Validate Only scenarios for your migrated configurations, the next step is to migrate your active user/OU feeds from the DLW. If you do not currently use feeds in the DLW, you can skip this step.

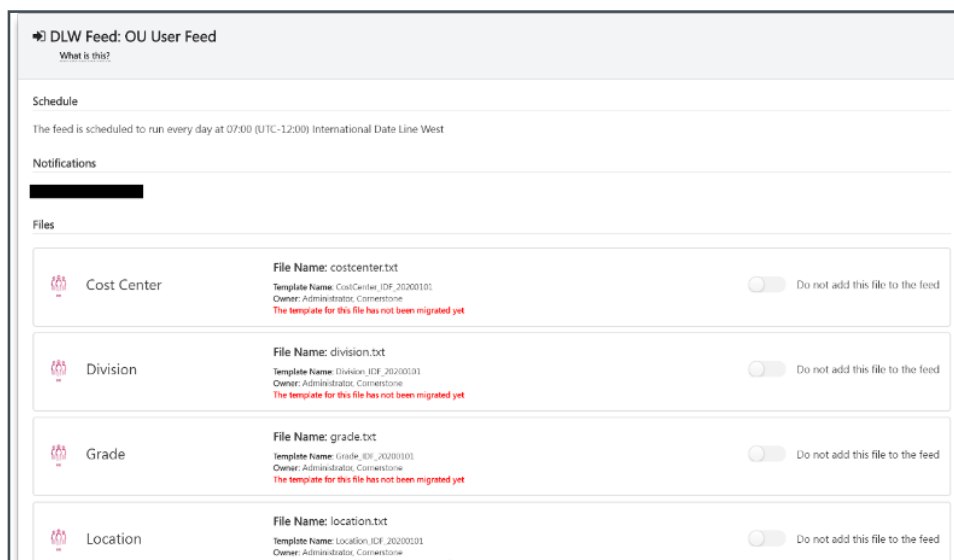
1. On the Edge Import homepage, click on the DLW Migration button.
2. Click on Feeds. On this tab, you can see the list of active DLW feeds. Note that you will not see any inactive DLW feeds listed on this page. To migrate a DLW feed, it must be active.



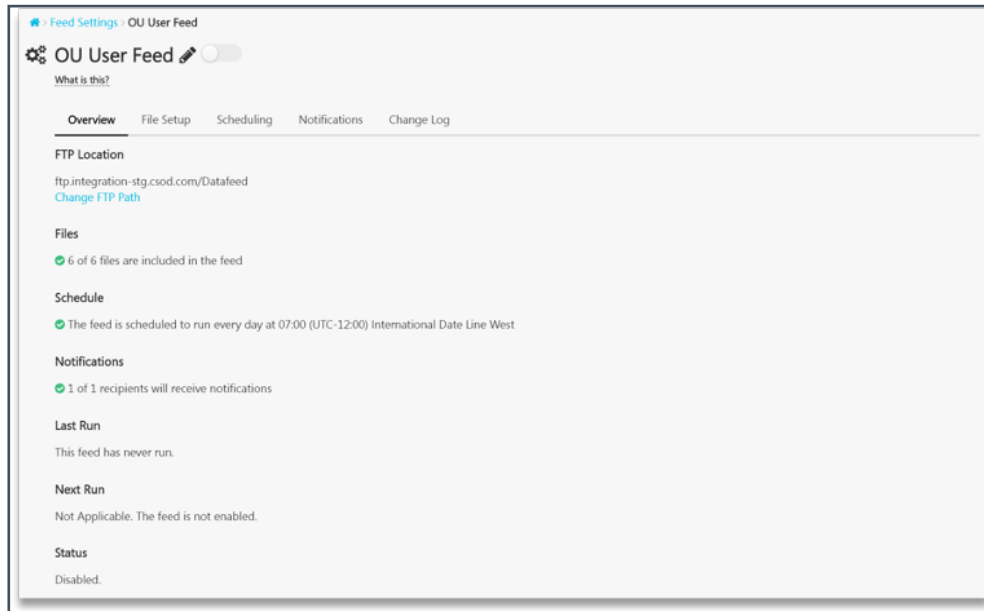
3. Click on a user/OU feed to see the feed details.



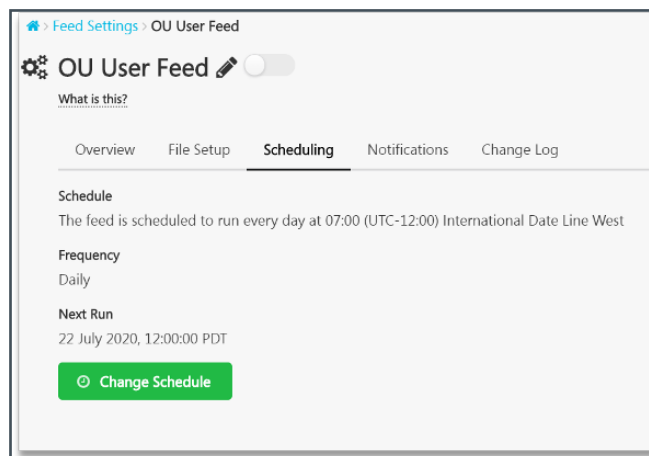
4. The Feed Migration Wizard shows the current feed schedule, the email addresses listed on the feed notifications, and the files associated with the feed along with the template names. These details are pulled from the DLW.
5. Each template associated with the feed must be migrated prior to migrating the feed.
  - a. If you have templates that haven't been migrated yet, you will need to **Cancel** the feed migration, go back to the Templates tab, and migrate the required templates.
  - b. If you do not wish to include a particular file in the feed, toggle the **Do not add this file to the feed** option.



6. When you are ready, select Migrate Feed.
7. You should see a confirmation indicating that the feed has been migrated. You will also be navigated to the Feed Configuration page.
  - a. Note that all migrated feeds are in a disabled state. We do this to ensure that you have full control over when to enable a feed in your portal. Edge Import will not execute disabled feeds on a schedule. You can still manually trigger disabled feeds as needed.



8. From here you can:
  - a. Rename the Feed
  - b. Modify the FTP Location.
    - Note that we carry over the current FTP location used by the DLW feed. It is unlikely that you will want to change this, but the option exists.



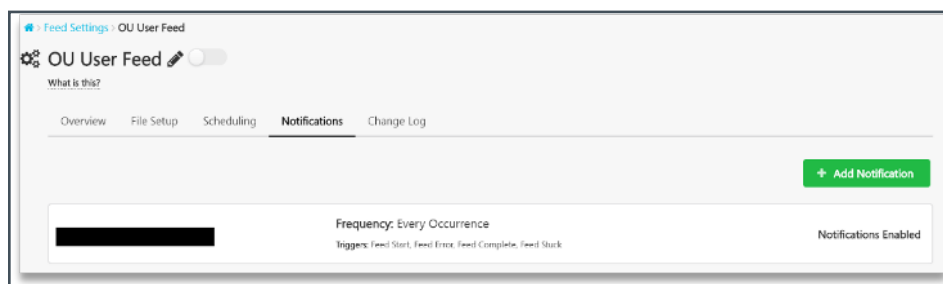
c. Modify the File Setup

d. Modify the Schedule

- Note that we carry over the current feed schedule from the DLW. Again, it's unlikely that you will want to change this, but we provide you the option to modify it.

e. Modify Notifications.

- Note that DLW feeds only support a single notification via email. Edge Import feeds have the option of up to four based on Feed Triggers. All four are selected by default for migrated feeds. You may want to adjust the notification settings per your preference.

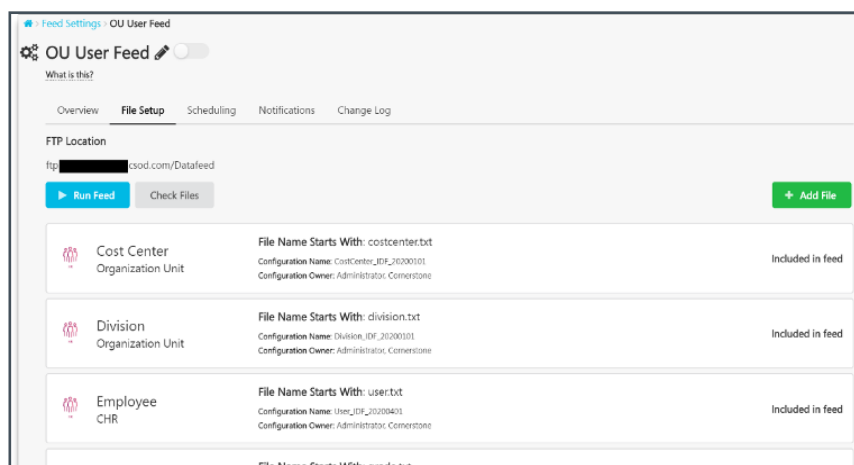


## Test Feeds (Manual Run)

You can test a migrated feed by either manually triggering it or enabling it and waiting for the scheduled feed run to occur. We recommend manually triggering the feed in this step. If you do not currently use feeds in the DLW, you can skip this step.

To manually run a feed,

1. Make sure that you have the required files placed in the FTP. To verify that the files are present in the FTP, click on the **File Setup** tab and select **Check Files**.





2. When ready, select Run Feed.
3. You will be navigated to the Feed Runs page where you can see the status of each file in the feed.
4. Once the feed completes running, verify the results.



Note that every record in all files within the feed will have an error with the following message in the feed report: HR data cannot be loaded while Data Load Wizard (DLW) is enabled. To disable the DLW, navigate to the Edge Import homepage > DLW Migration > 'Disable DLW' tab > Click on the 'Disable' button for HR. You need the 'Disable Data Load Wizard' permission to access this tab. This is to be expected since we haven't turned off the DLW just yet. However, seeing this error does confirm that all other steps in the migration process worked.

## Turn off DLW Users and OU loads/feeds

Once you are satisfied with the outcome of the Validate Only scenarios and the manual feed run results, you will want to load data in your Stage portal and perform additional tests. But before you do that, you will need to turn off User/OU loads in the DLW.

1. **Turning off the DLW Users and OU loads/feeds is a permanent action that cannot be undone.** Coordinate with other teams in your organization who may be using the DLW today to manage user/OU data.
  - Train these teams to use Edge Import. They won't be able to load data until the DLW is turned off, but at least they can get oriented with the tool and its workflows.
2. When you are ready to turn off the user/OU loads in the DLW, navigate to Admin > Tools > Edge > Imports and feeds > DLW Migration > Disable DLW.
3. Click on **Disable** for **HR**.



You will only see the Disable DLW tab if you have the Disable Data Load Wizard permission.

4. Read the warning message, type the term CONFIRM in the textbox and click Confirm.



## Load Data and Review Results

Once you have disabled the user/OU loads in the DLW in Stage, load data using the migrated configurations and review the results. This time you will also be validating the steps that were not checked in the **Validate Only** scenario such as employee relationships, OU relationships, and post-processing steps.

1. Navigate to the **Loads** page (Admin > Tools > Edge > Imports and Feeds > Loads).
2. Click **New Load**.
3. In the **Category and Type** dropdown, select the load type for which you just migrated a template.
4. In the **Configuration** dropdown, select the configuration that you just migrated.
5. Upload a file and click **Load**
6. Review the results of the load and confirm that they are along expected lines.

We recommend that you perform the **Load** operation at least once for each load type you wish to migrate from the DLW. Use the test cases in the Appendix as a guide again. We highly recommend that you expand on these test cases to include as many test scenarios as possible that apply to your organization.

## Test Feeds (Automated Run)

The last step in your Stage validations is to enable your migrated feed and let it run on a schedule. To enable the feed, navigate to the Edge Import homepage > Feed Settings > Select your migrated feed > Toggle ON the switch next to the feed name.

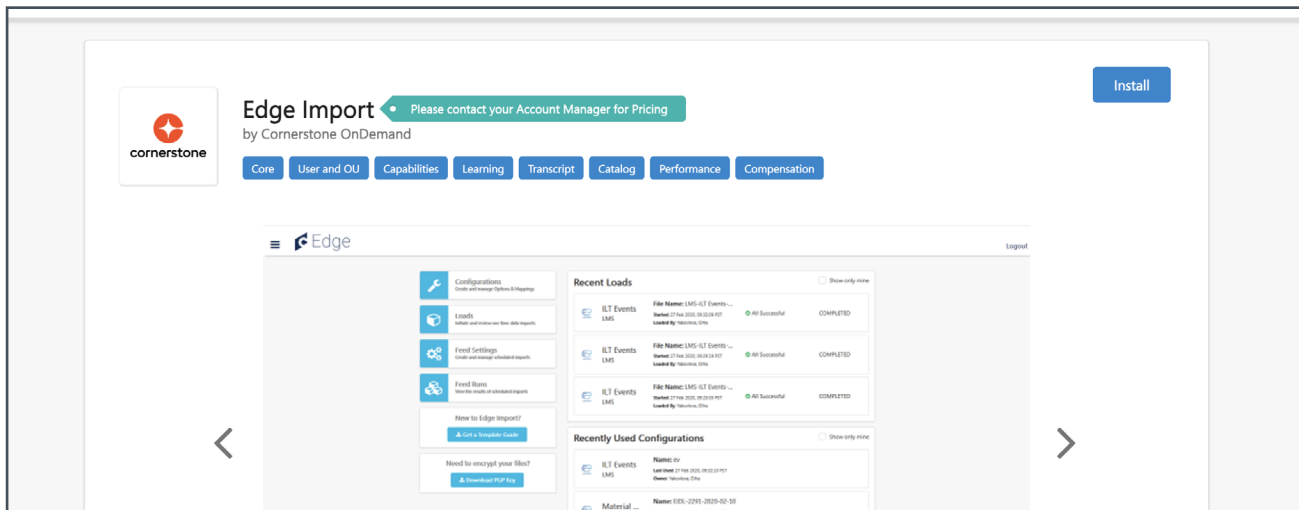
Wait for the scheduled feed run to occur and then validate the results, including any email notifications that are currently configured in the feed.

# Move to Production

## Purchase and Enable Edge Import

After you finish testing and validating on Stage, the next step is to purchase and enable Edge Import on Production.

1. The steps to enable Edge Import on Production are the same as discussed earlier for Stage with the exception that in Production the **Install** button will be labeled **Purchase**.



2. After clicking **Purchase**, you will be presented with a three-step purchase workflow which includes Invoicing details, Company details, and Terms & Conditions.
3. Review the invoicing details then select the checkbox **I have read, understand and agree to the terms and conditions above**, then click **Purchase**.
4. **Edge Import** is enabled, and you can use it right away. However, an Account Manager from Cornerstone will reach out with next steps to complete the purchase process.

# Complete DLW Migration

1. Use the same process that you used on Stage to migrate your Templates and Feeds.
2. Follow the same protocol of checking the portal using to validate the load. Again, use the Test Cases in the **Appendix** as a guide and expand on them to cover all possible scenarios for your organization.



**Auto-deactivation** of users with Allow Reconciliation will continue even if Validate Only is selected and DLW is still enabled. Users will still be inactivated,

3. When ready, Disable DLW for the HR DLW Module in order to start loading OU and User data in Edge Import on Production.
4. If you use feeds, enable your migrated feed in Production. We recommend monitoring the results of the first few automated feed runs to confirm that the migration was successful.

## Go Live Recommendations

- It is suggested that the feed should be migrated and prepped days prior to disabling the DLW.
- Schedule the Go Live for immediately after a final daily run. Have IT and/or HRIS resources as a part of that plan.
- Submitting the “Confirm” on the DLW Disablement will be irreversible and the end state of DLW.
- Run feeds manually after DLW end by placing files in the FTP and using the run manual function. (If HRIS gives you files for import – don’t ever open them. Just move them into the correct FTP folder.)
- Address any errors in real time. Set expectation, CSM and Coaching requests will not be the path of real time resolution for PROD errors or issues. GCS ticket and phone call will be required to resolve any problems
- Go to Feed Settings and verify feeds are scheduled to run again the next day, and that they are showing as Active or toggled on for the next auto job.
- Check feed logs the following morning, and confirm logs arrived for the notification recipients.

# Considerations for GUID and Recruiting Applicant Conversion

It is common for Recruiting customers to use their User/ Employee data feeds to convert hired applicants directly to users. This allows for Onboarding and applicant history to be retained on the employee record.

Because **applicant User IDs are based on the email they applied with**, it is necessary to change their User ID when converting them to employees. To change a User ID using a data feed, a unique identifier other than User ID must be used as a reference. This identifier is the GUID (or Global Unique Identifier), a back-end identification created by Cornerstone for each user in the system.

When creating a Configuration for an Employee load in Edge Import, you will choose the **primary identifier** for your feed (in our scenario set to GUID) and the **convert applicant to employees** (set to yes.)

Employee Questions

1. What is the primary identifier?  
 User ID  GUID  GUID (Update Only)  User ID (with Auto-generation of ID's)
2. Inactivate employees not present in the file?  
 Yes  No
3. Can employees be assigned to inactive Organizational Units?  
 Yes  No
4. Can User Relations accept inactive Users?  
 Yes  No
5. Do you want to convert applicants to employees?  
 Yes  No
6. What should we do with blank values?  
 Apply default value  Do Nothing
7. What culture should be used as a default?  
English (US)

**It is important to note that when selecting the GUID as the primary identifier in your employee configuration, all IDs associated to a user (including Manager, Approver, and Custom Relationships) will need to be delivered as their GUID and not User ID.**

This creates a unique challenge for customers who wish to convert their applicants to employees, as their HRIS tools do not generally have the Cornerstone GUIDs available for mapping.

The below table provides a comparison of what was possible using the Data Load Wizard and what is now available with Edge Imports different primary key options:

		Edge Import Employee feed using the Primary Key of:		
Solution	Legacy DLW	User ID	GUID	GUID (Update Only)
Primary Key for the User	User ID / Username / GUID	User ID	GUID	GUID
Primary Key for Employee Relationships (Mgr, Approver, custom)	User ID	User ID	GUID	GUID
Converts Applicants	Yes	Yes*	Yes	Yes
If No GUID provided - User ID has a match	Uses User ID or Username	Uses User ID	Error	Error
Can Update the User ID	Yes if GUID provided	No	Yes	Yes
Can Insert New User without GUID	Yes	Yes	Yes - User ID Required	No
Update User ID if Username matches	Yes	No	No	No
Data Integrity Best Practices	No - mixed primary key	Yes	Yes	Yes

\*Though it is possible to create data loads that convert applicants using the User ID, this method is not recommended as the User ID will NOT be updated and will remain the email address used for application. Generally, this will not match the user record provided in a data feed, making this an impractical method for ongoing feed configurations.

**To help clients that experience this challenge of GUID needing to be applied to related users, Cornerstone has designed several workarounds to assist in successfully converting your applicants to employees.**



Keep in mind, if your organization does not rely on the Onboarding module, does not require keep applicant history tied to the employee record, or otherwise use the GUID as a primary identifier, then you should have no reason to perform these workarounds. Normal User ID employee load should work for your organization without issue. Recognize that using this method, the applicant will not be converted to an Active user and a duplicate record will be created representing the employee while the applicant record will remain intact.

## Option 1: Single File

### Summary:

This method will result in a single data feed file sent to Cornerstone from your HRIS vendor. In this file the primary user identifier and the identifier for related users (managers, approvers, customer relationships) will be the GUID.

### Recommended for:

This method is recommended for large customers with IT / Dev teams capable of building the necessary logic systems to achieve this, and may be most suitable for new customers.

### Process:

To achieve this, the customer will need to initiate a custom project or utilize Reporting and Data Export APIs to have the GUIDs for Cornerstone user records delivered to their HRIS tool. When creating the user file to send to Edge Import, the HRIS will provide those GUIDs for the user relationships.

It may also be possible to upload your GUIDs manually to your HRIS using Reporting 2.0 to create a one-time bulk update, and then create smaller updates for new hires.

### In Edge Import:

- When creating your Configuration select the **GUID** as your primary identifier.
- Select **Yes** when asked if you want to convert applicants to employees.

## In your data files:

For all Employee data feed files delivered from your HRIS, the **GUID** will need to be pre-populated for each user. You will also need to include the **User ID** (so that the user's User ID will update from the ID given when they were applicants.)

For each related user field (manager, approver, and other custom relationships,) provide their **GUID** as well.

GUID	User ID	Prefix	First Name	Middle Name	Last Name	Suffix	Username	Approver	Manager
451912bd-6215-40e0-be54-f0fc97507228	nktest		Nathan	L	Karl		nktest	b8a35f1a-86d2-4b17-99c2-9ca50319650c	b8a35f1a-86d2-4b17-99c2-9ca50319650c

## Option 2: Multiple Files

### Summary:

In this method, **your HRIS will send two identical Employee files**, containing both the GUID and User ID for your employees.

In Edge Import, you will create two separate Configurations and Scheduled Feeds:

- The first, will utilize the **GUID** for your users in the employee file, while also loading your Organizational Units. Though the Employee file can contain their values, the Manager, Approver, and custom relationships will not be mapped.
- The second feed will process an identical copy of the Employee file, the configuration will be set to use the **User ID** as the primary identifier.  
**This file will map the User IDs of related users and is meant to update the user record with the correct information.**
- **For both files, the Personal Email Address field will need to be populated**, this will act as a fail safe to prevent duplicate records from being created if the first file (GUID) should fail.

### Recommended for:

This method is recommended for customers that rely on their HRIS partner to create logic for their files.



## Process:

To achieve this, the customer will need to initiate a custom project or utilize Reporting and Data Export APIs to have the GUIDs for Cornerstone user records delivered to their HRIS tool. When creating the user file to send to Edge Import, the HRIS will provide those GUIDs for the user relationships.

GUIDs only need to be sent for newly hired applicants in order to convert them to new hires, or to update the User ID of these applicants if Onboarding was launched.

## In your data file:

For the identical data feed files from your HRIS, the **GUID** will need to be populated for each user that is an applicant / Onboarded applicant that needs to be converted or get a Userid updated. You will also need to include the **User ID** for all users.

For each **related user field** (manager, approver, and other custom relationships,) provide their User ID. For the first Configuration you create, this information will not load because the system fields are not be mapped in this configuration. It will, however, be mapped and loaded with your second Configuration.

It is strongly recommended that you include the **Personal Email Address** field. The Personal Email Address must be unique among users and applicants and will act as a failsafe to prevent duplicate records if there should be an error with the conversion process.

A	B	C	D	E	F	G	H	I	J	Abs	AH
GUID 451912bd-6215-40e0-be54-f0fc97507228	User ID nktest	Prefix	First Name Nathan	Middle Name L	Last Name Karl	Suffix	Username nktest	Approver gallen	Manager gallen		Personal Email bunnyboy@gmail.com

## Configuration #1 - Using the GUID as the primary identifier:

- When creating your Configuration select the **GUID** as your primary identifier.
- Select **Yes** when asked if you want to convert applicants to employees.

Employee Questions

1. What is the primary identifier?  
 User ID  GUID  GUID (Update Only)  User ID (with Auto-generation of ID's)
2. Inactivate employees not present in the file?  
 Yes  No
3. Can employees be assigned to inactive Organizational Units?  
 Yes  No
4. Can User Relations accept inactive Users?  
 Yes  No
5. Do you want to convert applicants to employees?  
 Yes  No
6. What should we do with blank values?  
 Apply default values  Do Nothing

- On the Mapping page of your Configuration, it is very important that you ensure **the Manager, Approver, and any other relationship fields are NOT mapped** in this Configuration. This is because the feed will be expecting a GUID value were these fields mapped and will cause load errors. The second Configuration you create will map these values.

Username	Username	Username
Approver	--no mapping--	
Manager	--no mapping--	
Absent	Absent	Select this option to mark the user absent

### Scheduled Feed #1 - Using the GUID as the primary identifier:

- Within Feed Settings, create a new Feed.
- In the File Setup, include your Employee configuration that includes **GUID** as the primary identifier and include your **Organization Unit** configurations.
- In the Scheduling tab, schedule this feed so that it will run before the next feed (allow for at least 30 minutes between feeds.)

Run Feed	Check Files	+ Add File
Employee CHR	File Name Starts With: Employees Configuration Name: Employees - GUID Configuration Owner: Kenkel, N	Included in feed
Location Organization Unit	File Name Starts With: Locale Configuration Name: Location File Mapping Configuration Owner: Kenkel, N	Included in feed



### Existing User Error on the Feed Log:

After Feed 1 (GUID) to Convert Applicants to Employees has loaded, you will be presented with an error log.

For users that already exist in your portal without a GUID in the file, you will see an error that states: User ID: Creation failed due to the requirements that the provided value must be unique across User ID and Username.

	A	B	C	D	E
1	Loaded	Errors	Warnings	GUID	User ID
2	No	GUID: Field is not a valid GUID	GUID: Field is not a valid GUID	b99ed8ed-	NPS22002
3	No	GUID: Field is not a valid GUID	GUID: Field is not a valid GUID	a1d21d45-	NPS20002
4	No	This applicant cannot be converted to an employee due to having a status of "unqualified".		3d048af2-c	NPS20004
5	No	User ID: Creation failed due to the requirement that the provided value must be unique across User ID and Username.			NPS10006
6	No	User ID: Creation failed due to the requirement that the provided value must be unique across User ID and Username.			adp911115
7	No	User ID: Creation failed due to the requirement that the provided value must be unique across User ID and Username.			ADP9876
8	No	User ID: Creation failed due to the requirement that the provided value must be unique across User ID and Username.			CID12345
9	No	User ID: Creation failed due to the requirement that the provided value must be unique across User ID and Username.			Duplicate_r
10	No	User ID: Creation failed due to the requirement that the provided value must be unique across User ID and Username.			DynPrimary
11	No	User ID: Creation failed due to the requirement that the provided value must be unique across User ID and Username.			DynSecond
12	No	User ID: Creation failed due to the requirement that the provided value must be unique across User ID and Username.			HiringMgrPl
13	No	User ID: Creation failed due to the requirement that the provided value must be unique across User ID and Username.			Horace Albr

This error is to inform you that the conversion did not take place for these users because they already exist.

**These users will receive their necessary updates on the next run** (the User ID file).

New users will still be inserted, but their user relationships will not be inserted (because they are not mapped) until the next run.

For more examples of common errors, see [Appendix D](#).

## Configuration #2 - Using the User ID as the primary identifier:

- When creating your Configuration select the **User ID** as your primary identifier.
- Select **No** when asked if you want to convert applicants to employees.
- If you wish to allow for user records not included in your file to be automatically inactivated, select that now.

Employee Questions

1. What is the primary identifier?  
 User ID  GUID  GUID (Update Only)  User ID (with Auto-generation of ID's)

2. Inactivate employees not present in the file?  
 Yes  No

3. Can employees be assigned to inactive Organizational Units?  
 Yes  No

4. Can User Relations accept inactive Users?  
 Yes  No

5. Do you want to convert applicants to employees?  
 Yes  No

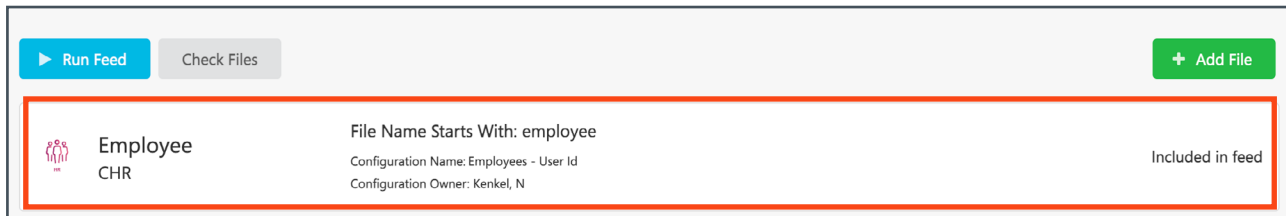
6. What should we do with blank values?  
 Apply default value  Do Nothing

- On the Mapping page of this Configuration, it is very important that you ensure **the Manager, Approver, and any other relationship fields are mapped** in this Configuration.
  - It is important that you **do not map the GUID** field in this configuration.

<input checked="" type="checkbox"/>	Username	Username	▼	Username
<input checked="" type="checkbox"/>	Approver	Manager	▼	Manager
<input checked="" type="checkbox"/>	Manager	Approver	▼	Approver
<input checked="" type="checkbox"/>	Absent	Absent	▼	Select this option to mark the user absent

## Scheduled Feed #2 - Using the User ID as the primary identifier:

- Within Feed Settings, create another new Feed.
- In the File Setup, include only your Employee configuration that includes **User ID** as the primary identifier.
- In the Scheduling tab, schedule this feed so that it will run after the GUID feed (ideally, at least 30 minutes after.)



For examples of common scenarios you might encounter when using this multiple file option, take a look at [Appendix F](#).

# Appendix

## Appendix A: Support

Should you encounter issues, please open a support ticket with the Global Customer Support (GCS) team.

In the support ticket, include the following information to facilitate troubleshooting.

- Environment used
- Load type
- A copy of the template used for loading
- Load Details URL (for example, <https://lax-qap-ex.csod.com/edgeimport-web/load/8ab1c9a4-f784-4c148714-0d1b46c63a72>)

## Appendix B: Test Cases

The following Test Cases are examples of how to load and verify data using Edge Import. Please note that this is not an exhaustive list and is provided as a starting point for your testing.

### Test Case 1: Validate Division OU Load

1. Load a Division. Provide the required fields along with some pieces of metadata such as the Parent ID or Owner ID.

A	B	C	D	E	F	G
<b>OU ID</b>	<b>OU Name</b>	Active	Allow Rec	Parent ID	Owner ID	Description
Test Division 1	Test Division 1	TRUE	TRUE	CAD		Testing Edge Import Loads

2. Perform a Validation Load using the template in Edge Import by selecting Loads > New Load > Select the Category / Type and your Configuration > Upload your file or select from FTP > Select the Validate Only button.
3. Ensure all records validate with a Successful status

## Test Case 2: Validate Location OU Load

1. Load a Location. Provide the required fields along with some pieces of metadata such as the Description.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
<b>OU ID</b>	<b>OU Name</b>	Active	Allow Recr	Parent ID	Owner ID	Description	ZIP or Post	Facility Ty	On Site	Country	<b>Time Zone</b>	Address #	Addr
Test Location 1	Test Location 1	TRUE	TRUE			Testing Edge Import					PST		

2. Perform a Validation Load using the template in Edge Import by selecting Loads > New Load > Select the Category / Type and your Configuration > Upload your file or select from FTP > Select the Validate Only button.
3. Ensure all records validate with a Successful status

## Test Case 3: Validate Employee Load

1. Load files with multiple users (Employee in Edge Import). Create scenarios based on the settings you have chosen for your configuration:

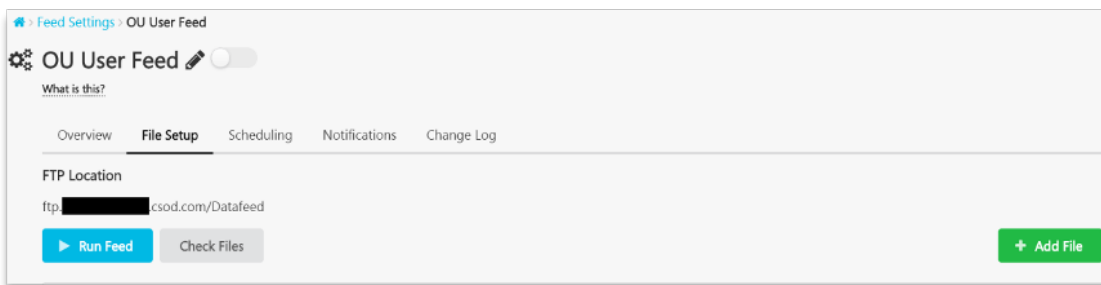
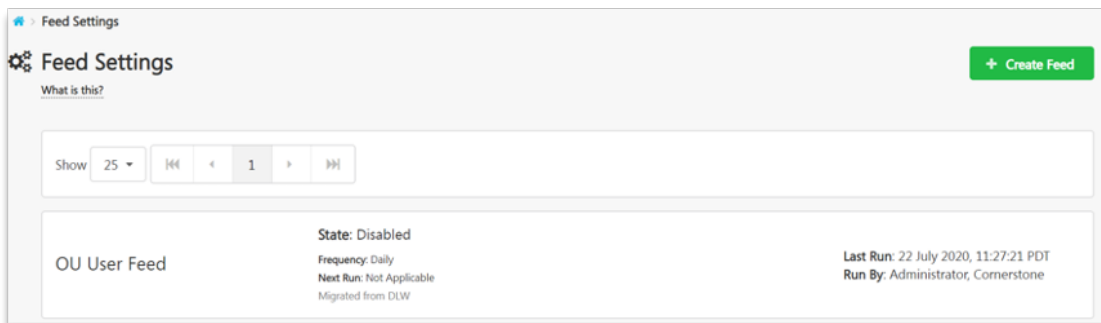
A	B	C	D	E	F	G	H	I	J	K	L	M	N
<b>User ID</b>	Local System Prefix	<b>First Name</b>	Middle Name	<b>Last Name</b>	Suffix	Username	Approver	Manager	Absent	Allow Recr	Email	Required	
TestUser1		Test		User1		TestUser1				TRUE			

- If you have chosen inactivate employees not present in the file, be sure to not include an already active user in the file.
  - Include Blank Values to test if the existing user record values are left as is or replaced by a Default Value.
  - Observe if users can be associated to inactive manager/approvers or OUs.
  - Etc.
2. Provide the required fields along with some pieces of metadata such as the Last Hire Date.
  3. Perform a Validation Load using the template in Edge Import by selecting Loads > New Load > Select the Category / Type and your Configuration > Upload your file or select from FTP > Select the Validate Only button.
  4. Ensure all records validate with a Successful status

## Test Case 4: Test Automated Feed Run

**NOTE: YOU WILL NOT BE ABLE TO COMPLETE THIS TEST UNTIL THE HR MODULE OF THE DATA LOAD WIZARD IS DISABLED.**

1. Create Organizational Unit and User files based upon the correct Configurations created during the Migration and place them in the correct folder on the SFTP site based on the Feed Configuration. If possible, utilize the same files you will be loading into Production.



2. Trigger the feed. Edge Import > Feed Settings > Select the Feed > File Setup tab > Run Feed
3. The results of the feed run can be viewed via Edge Import > Feed Runs
4. Ensure that the correct Email Notifications were sent based on the Feed Configuration > Notifications tab.



**Auto-deactivation** of users with Allow Reconciliation will continue even if Validate Only is selected and DLW is still enabled. Users will still be inactivated,

# Appendix D: Common Errors

The below table displays common errors that you might encounter during import and explanations of how to correct the problem for proper loading.

Import Error	Error Explanation/Solution
<p>“Threshold Exceeded. Employee not present in the file were not inactivated”</p> <p>or “EIP_OU_ReconcileThresholdError**”</p>	<p>This is by Design, there is a threshold on auto Inactivation (Reconciliation). We can not in-activate more than 10% of Employees or given type of OU within system. This is a safety measure to protect your data integrity. This is to reduce the risk of mass deactivation; the threshold is not configurable.</p>
<p>When attempting to complete a CHR Employee Load via Edge Import, the following error is thrown: Error: *CHR.ERROR.CannotPersistForEffectiveDatedClient*</p> <p>The error only appears when loading the file, not when validating.</p>	<p>Edge Import Employee and OU is currently only supported for Non-CHR clients.</p> <p>Edge Import for Effective Dated Load is not released and supported yet for CHR clients. This functionality may have been accidentally enabled the Edge Import.</p>
<p>While loading the User or OU file, you encounter the below error(s).</p> <p>Post Processing : Inactivate employees not present in the file OR Inactivate OUs not present in the file</p> <p>Error details : Task aborted because the processed record count does not match the input file record count. Ensure all records contain a valid primary identifier.</p>	<p>Please remove the inactive user/OU record from the User/OU load file and process the load file.</p> <p>Remove duplicate user/OU records from the employee/OU load file and reload the file.</p> <p>Correct any identified invalid values from the employee/OU load file and reload the file.</p>
<p>When and why does the error “Maximum queued files for this type has been reached” display?</p>	<p>Edge Import has a limit of how many files of any given type can be loaded at the same time. For many types, this limit is 2. Beyond that, in most cases, the system will queue up to 5 more. Therefore, if a feed tries to run more than 7 files of the same type at the same time, they would get the “maximum queued” error.</p> <p>- The maximum queued files allowed for Custom OUs are 15 files.</p>
<p>When doing edge imports, the system is not updating the related users and at the same time it is not returning validation or system errors.</p>	<p>This can be due to leading zero. If your users in your portal have their user IDs starting with “0” (example user ID “000011111”) make sure in the excel file you are loading that the cells containing those user IDs are not removing the leading zero(s).</p> <p>This is coming from the excel software and not CSOD. Those situations are referred as “leading zero” which can be resolved in changing the format of the “affected” cells in excel.</p>



# Appendix E: Frequently Asked Questions

**Q: Can I delete a data feed in Edge Import?**

A: Feeds can be deactivated but not deleted. Note that for every feed setting there is a change log that allows you to see who created or made changes to the feed, what changed, and when the change was made.

**Q: What is the max number of records for Edge Import user data feed?**

A: The maximum amount of user records you can load through the Edge Import tool is 1,000,000 records. This is for Production, pilot and stage.

**Q: Is it possible to use Edge Import - Employee if CHR is enable?**

A: Yes! Edge Import support for employee and OU loads and feeds was extended to Cornerstone HR customers.

**Q: I have made an Edge Import Load (OU/User/etc..) that has been completed in my portal. When I download the Log file and open it under Excel, many columns are showing asterisks values, instead of the original value from our original input file?**

A: This is an expected system behavior. If the import file is configured with PGP encryption, the log file will only show data in unique identifiers. This is to make sure the encryption is present from end to end in the load process.

**Q: Are there any ways to force cancel Edge Import Feeds?**

A: There is no way in the UI to kill or force stop a feed in progress with Edge Import. Also, it won't be possible to force stop the feed from the backend.

**Q: What will happen if the related feed setting is disabled while the feed is running?**

A: The feed will keep running and won't be aborted if the related feed setting is disabled. This means even if you disable the feed in the middle of feed execution it will still continue to run and won't impact the in-progress execution.

# Appendix F:

## Use cases for using multiple feeds to convert applicants

When using GUID as the primary identifier for employee loads, Edge Import expects that related users (Managers, Approvers, Custom Relationships) are also sent with their GUIDs. This is a requirement that many clients are not capable of meeting with their user feeds.

Because converting applicants to employees using Edge Import is often dependent on using the GUID as a primary identifier, many clients will need to send identical Employee files through separate Configurations and Feeds (see [page 28](#)).

The following user experiences can be expected for the most common situations you may encounter when utilizing this option:

### The External Candidate is a first time hire with no Onboarding Launched

In this scenario, the applicant will begin as an external candidate.

	Applicant data in CSOD prior to feed	Data sent from HRIS in Employee feed files	First Load - GUID	Second Load - User ID
			Outcome in CSOD	Outcome in CSOD
<b>GUID</b>	cde0425...	cde0425...	cde0425...	cde0425... <b>(Not mapped)</b>
<b>User ID</b>	Robin@gmail.com	ADP123	ADP123	ADP123
<b>Username</b>	Robin@gmail.com	Rwinzer	Rwinzer	Rwinzer
<b>Email</b>	Robin@gmail.com	Robin@company.com	Robin@company.com	Robin@company.com
<b>Personal Email</b>	Robin@gmail.com	Robin@gmail.com	Robin@gmail.com	Robin@gmail.com
<b>Status</b>	External Candidate	Active	Active	Active
<b>Manager (User ID)</b>	HM123	NewMgr234	HM123 <b>(no change as this was not mapped)</b>	HM123
<b>Position (ID)</b>	ParkRanger	ParkRanger	Park Ranger	Park Ranger

## The External Candidate is a first time hire with Onboarding Launched

In this scenario, the applicant will already be converted to an Active user with the launch of Onboarding.

	Applicant data in CSOD prior to feed	Data sent from HRIS in Employee feed files	First Load - GUID	Second Load - User ID
			Outcome in CSOD	Outcome in CSOD
<b>GUID</b>	cde0425...	cde0425...	cde0425...	cde0425... <b>(Not mapped)</b>
<b>User ID</b>	Robin@gmail.com	ADP123	ADP123	ADP123
<b>Username</b>	Robin@gmail.com	Rwinzer	Rwinzer	Rwinzer
<b>Email</b>	Robin@gmail.com	Robin@company.com	Robin@company.com	Robin@company.com
<b>Personal Email</b>	Robin@gmail.com	Robin@gmail.com	Robin@gmail.com	Robin@gmail.com
<b>Status</b>	Active	Active	Active	Active
<b>Manager (User ID)</b>	HM123	NewMgr234	HM123 <b>(no change as this was not mapped)</b>	HM123
<b>Position (ID)</b>	ParkRanger	ParkRanger	Park Ranger	Park Ranger

## The External Candidate is a first time hire but an incorrect GUID has been provided.

In this scenario, the HRIS has provided the incorrect GUID.

- The **first load (GUID) will error** and will not convert the applicant to an employee.
- The **second load (user ID) will also error and not make any updates** as the Personal Email already exists (on the logically unconnected applicant record).

	Applicant data in CSOD prior to feed	Data sent from HRIS in Employee feed files	First Load - GUID	Second Load - User ID
			Outcome in CSOD	Outcome in CSOD
<b>GUID</b>	cde0425...	mn1099...	Error: Invalid GUID No conversion takes place, no user record created	Error: Personal Email already exists No update or user creation
<b>User ID</b>	Robin@gmail.com	ADP123		
<b>Username</b>	Robin@gmail.com	Rwinzer		
<b>Email</b>	Robin@gmail.com	Robin@company.com		
<b>Personal Email</b>	Robin@gmail.com	Robin@gmail.com		
<b>Status</b>	External Candidate	Active		
<b>Manager (User ID)</b>	HM123	NewMgr234		
<b>Position (ID)</b>	ParkRanger	ParkRanger		

## Internal Candidate hired for a new role

In this scenario, no conversion for the user will take place. The user will update accordingly, either from the first or second loads, depending if you choose to send a GUID for all users or just New Hires.

	User data in CSOD prior to feed	Data sent from HRIS in Employee feed files	First Load - GUID	Second Load - User ID
			Outcome in CSOD	Outcome in CSOD
<b>GUID</b>	cde0425...	cde0425... (does not need to be sent for this user)	cde0425...	cde0425... (Not mapped)
<b>User ID</b>	ADP123	ADP123	ADP123	ADP123
<b>Username</b>	Rwinzer	Rwinzer	Rwinzer	Rwinzer
<b>Email</b>	Robin@company.com	Robin@company.com	Robin@company.com	Robin@company.com
<b>Personal Email</b>	Robin@gmail.com	Robin@gmail.com	Robin@gmail.com	Robin@gmail.com
<b>Status</b>	Active	Active	Active	Active
<b>Manager (User ID)</b>	HM123	JohnMuir	HM123 (no change as this was not mapped)	JohnMuir
<b>Position (ID)</b>	ParkRanger	ManagingRanger	ManagingRanger	ManagingRanger

## Inactivation of user not sent in the feed

In this scenario, if you have elected to **Inactivate employees not present in the file** on either or both loads, users with the Allow Reconciliation field set to Yes/True on their User Record will be auto-inactivated (during the load that this setting is selected).

	User data in CSOD prior to feed	Data sent from HRIS in Employee feed files	First Load - GUID	Second Load - User ID
			Outcome in CSOD	Outcome in CSOD
<b>GUID</b>	cde0425...		cde0425...	cde0425...
<b>User ID</b>	ADP123		ADP123	ADP123
<b>Username</b>	Rwinzer		Rwinzer	Rwinzer
<b>Email</b>	Robin@company.com		Robin@company.com	Robin@company.com
<b>Allow Reconciliation</b>	Yes		Yes	Yes
<b>Personal Email</b>	Robin@gmail.com		Robin@gmail.com	Robin@gmail.com
<b>Status</b>	Active		Inactive	Inactive
<b>Manager (User ID)</b>	HM123		HM123	HM123

## A former employee Eligible for Rehire is hired again

In this scenario, a former employee has been rehired by your organization.

	User data in CSOD prior to feed	Data sent from HRIS in Employee feed files	First Load - GUID	Second Load - User ID
			Outcome in CSOD	Outcome in CSOD
<b>GUID</b>	cde0425...	cde0425... (does not need to be sent for this user)	cde0425...	cde0425... (Not mapped)
<b>User ID</b>	ADP123	ADP123	ADP123	ADP123
<b>Username</b>	Robin@gmail.com	Rwinzer	Rwinzer	Rwinzer
<b>Email</b>	Robin@gmail.com	Robin@company.com	Robin@company.com	Robin@company.com
<b>Personal Email</b>	Robin@gmail.com	Robin@gmail.com	Robin@gmail.com	Robin@gmail.com
<b>Employment Status</b>	Terminated	Working	Working	Working
<b>Eligible for Rehire</b>	Eligible			
<b>Status</b>	External Candidate	Active	Active	Active
<b>Manager (User ID)</b>	HM123	JohnMuir	HM123 (no change as this was not mapped)	JohnMuir
<b>Position (ID)</b>	ParkRanger	ManagingRanger	ManagingRanger	ManagingRanger

## Inactive user re-activated without GUID

In this scenario, an inactive user record has been re-activated by the second load with no GUID provided.

	User data in CSOD prior to feed	Data sent from HRIS in Employee feed files	First Load - GUID	Second Load - User ID
			Outcome in CSOD	Outcome in CSOD
<b>GUID</b>	cde0425...		cde0425... (but not provided)	cde0425... (but not provided)
<b>User ID</b>	ADP123	ADP123	ADP123	ADP123
<b>Username</b>	Robin@gmail.com	Rwinzer	Rwinzer	Rwinzer
<b>Email</b>	Robin@gmail.com	Robin@company.com	Robin@company.com	Robin@company.com
<b>Personal Email</b>	Robin@gmail.com	Robin@gmail.com	Robin@gmail.com	Robin@gmail.com
<b>Status</b>	Inactive	Active	Inactive	Active
<b>Manager (User ID)</b>	HM123	JohnMuir	HM123 (no change as this was not mapped)	JohnMuir
<b>Position (ID)</b>	ParkRanger	ManagingRanger	ManagingRanger	ManagingRanger

## An applicant with a status of Unqualified External Candidate is hired and sent in the feed

In this scenario, an applicant that had previously been deemed an Unqualified External Candidate was hired. The applicant here, because of their status as Unqualified will not load and display an error.

	User data in CSOD prior to feed	Data sent from HRIS in Employee feed files	First Load - GUID	Second Load - User ID
			Outcome in CSOD	Outcome in CSOD
<b>GUID</b>	cde0425...	cde0425...	Error: Invalid External Status No conversion takes place, no user record created	Error: Invalid External Status No conversion takes place, no user record created
<b>User ID</b>	ADP123	ADP123		
<b>Username</b>	Robin@gmail.com	Rwinzer		
<b>Email</b>	Robin@gmail.com	Robin@company.com		
<b>Personal Email</b>	Robin@gmail.com	Robin@gmail.com		
<b>Status</b>	Unqualified External Candidate	Active		
<b>Manager (User ID)</b>	HM123	JohnMuir		
<b>Position (ID)</b>	ParkRanger	ManagingRanger		