



# Employee Record Change Outbound Feed

## Edge Integration Guides



# Table of contents

<b>Overview</b>	<b>3</b>
User stories	3
<b>Getting started</b>	<b>4</b>
<b>Permissions</b>	<b>4</b>
Enablement	4
Email	6
<b>Data files</b>	<b>7</b>
<b>Frequently asked questions</b>	<b>8</b>

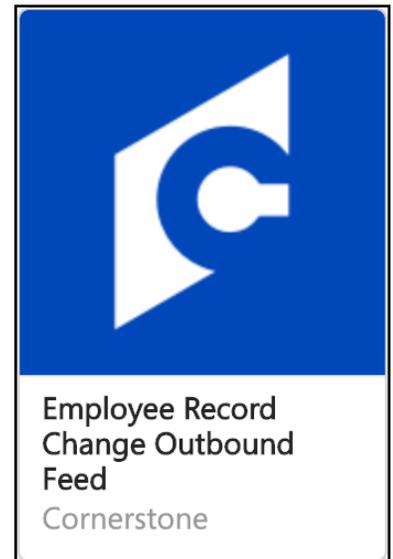
# Version history

VERSION	DATE	DESCRIPTION
1.0	4/8/2019	Original version
2.0	9/20/2019	Updates made to Data Files
3.0	1/26/2021	Various Revisions

# Overview

Employee Record Change Outbound Feed is a once a day outbound data feed available to clients using **Cornerstone HR** with **Effective Dating**. The feed reports all of the changes to employee user records that occur in your Cornerstone portal, providing you with what was changed, when it was changed, and why it was changed.

This data can be sent as either a CSV - comma delimited, CSV-Pipe delimited, or XML file to a secure FTP (sFTP) provided by CSOD. The file is available to be picked up by your organizations downstream systems that will process this file to stay in sync with the latest employee data housed in CSOD.



## User stories

Cheryl is a Human Resources Information Systems Administrator for her organization. She utilizes Cornerstone HR as the master database for employee information. To make sure any changes to user record data is properly reflected in the companies Payroll system she configures the Employee Record Change Outbound Feed using Edge.



# Getting started

## Permissions

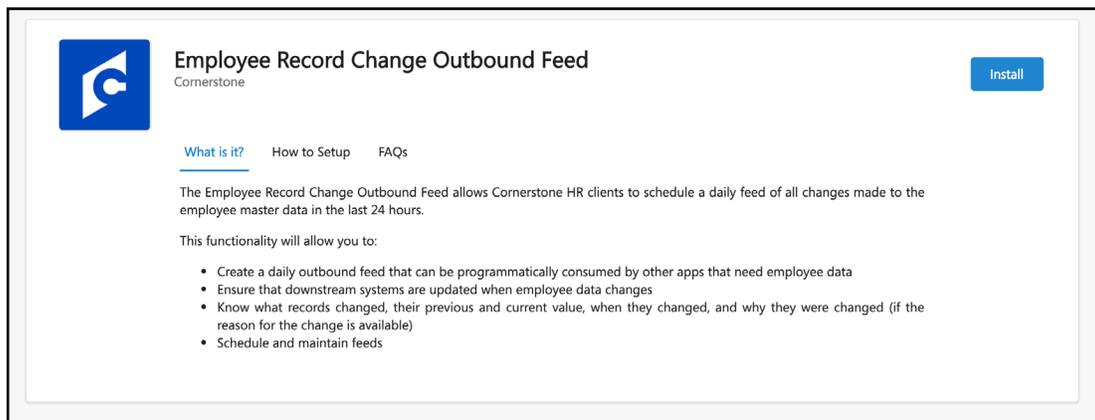
There are no permissions directly related to the Employee Record Change Outbound Feed, though Edge permissions are required to view and access the integration:

**Edge Marketplace - Manage:** Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system.

**Edge Integrations - Manage:** Grants access to the Integrations service for Edge Integrate where the administrator can configure, enable, and disable their third-party integrations that are used within the Cornerstone system.

## Enablement

The Employee Record Change Outbound Feed (with permission to Edge Marketplace and Integration Center) can be self-installed, configured, and enabled by navigation to the Edge Marketplace (ADMIN > TOOLS > EDGE > MARKETPLACE).

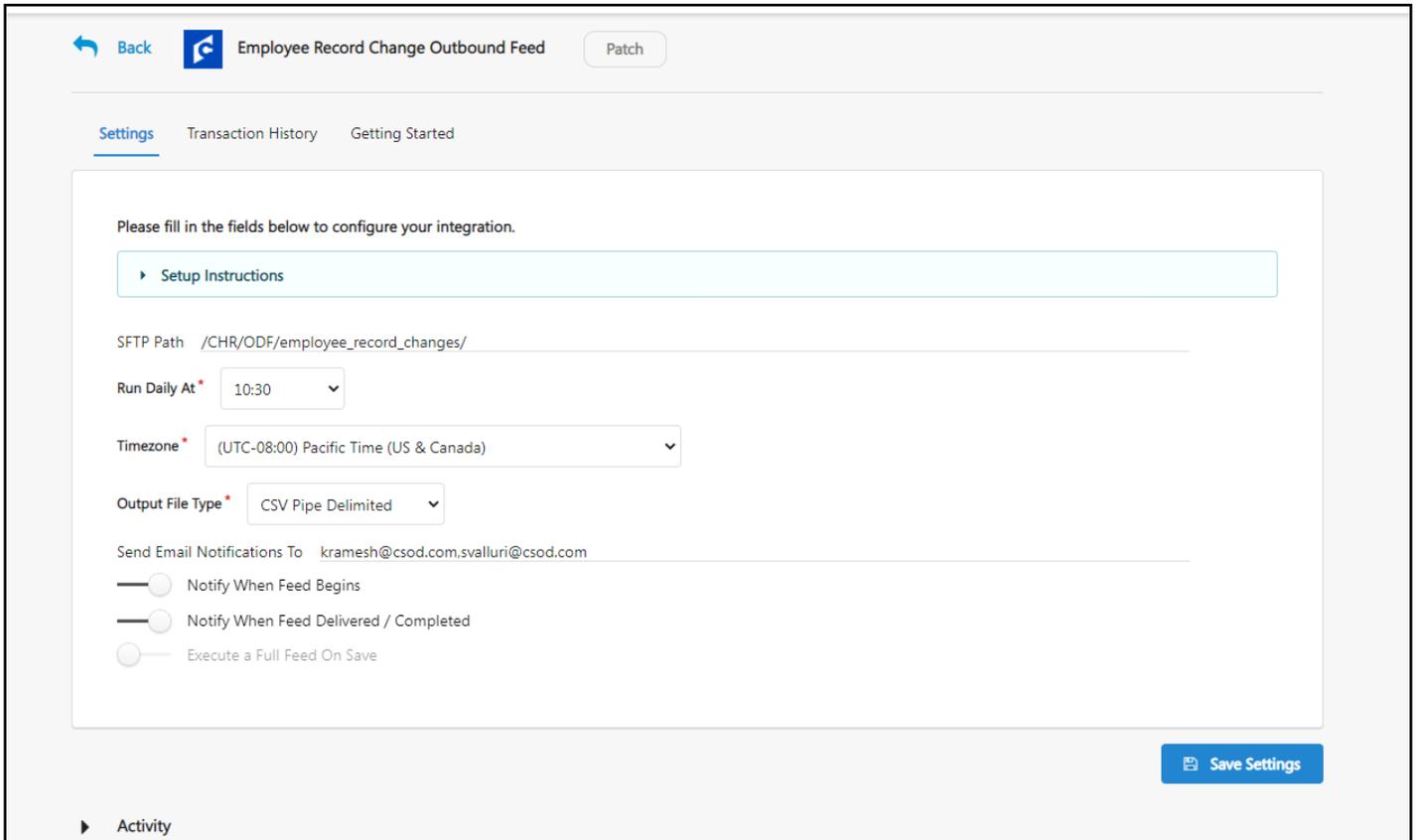


## Install

From the Marketplace, search for “Employee Record Change Outbound Feed”. Select the tile and select Install.

## CONFIGURE

Once installed you will be directed to the Edge Integrations page to begin entering the necessary data. If you navigate away from this page or need to make future changes you can return by going to the Edge Integrations page (ADMIN > TOOLS > EDGE > INTEGRATIONS) and selecting the Employee Record Change Outbound Feed.



The screenshot shows a web interface for configuring the "Employee Record Change Outbound Feed". At the top, there is a "Back" button and a "Patch" button. Below the title, there are three tabs: "Settings" (selected), "Transaction History", and "Getting Started". The main content area contains a message: "Please fill in the fields below to configure your integration." Below this is a "Setup Instructions" link. The configuration fields are: "SFTP Path" with the value "/CHR/ODF/employee\_record\_changes/"; "Run Daily At" set to "10:30"; "Timezone" set to "(UTC-08:00) Pacific Time (US & Canada)"; "Output File Type" set to "CSV Pipe Delimited"; and "Send Email Notifications To" with the email address "kramesh@csod.com.svalluri@csod.com". There are three toggle switches for notifications: "Notify When Feed Begins" (checked), "Notify When Feed Delivered / Completed" (checked), and "Execute a Full Feed On Save" (unchecked). A "Save Settings" button is located at the bottom right. At the bottom left, there is an "Activity" link.

**SFTP Location** - This is a read-only field that will display the location of the files on the FTP. To access, you will need an FTP client (such as Filezilla), and credentials to your FTP location. There are two possible folders your files will be located in, depending on the type of export:

- Daily feeds will be delivered to the */CHR/ODF/employee\_record\_changes/scheduled* folder.
- The optional “On-Deman full feeds” will be delivered to the */CHR/ODF/employee\_record\_changes/ondemand* folder.

This field includes a **Copy** option to save the address so you can paste it to your FTP client.

**Run Daily At** - The feed will begin processing at this time daily.

**TimeZone** - Select the timezone that the Run Daily At field will run based on.

**Output Type** - Choose the best output type for your downstream systems. Cornerstone allows the outputs in: CSV - comma delimited, CSV- Pipe delimited, or XML.

**Send Email Notifications To** - Allows you to define the recipients of the email notifications, enabled with the following toggles. If multiple recipients are required a comma can be used to separate the email addresses.

**Notify When Feed Begins** - Will send an email notification to the defined recipients informing them the feed has begun processing.

**Notify When Feed Delivered/ Completed** - Will send an email notification to the defined recipients informing them that the feed has finished processing or has failed.

**Execute A Full Feed On Save** - When this option is enabled, a full feed of all changes made since enablement of Effective Dating will begin to process. If a full feed is not needed, turn this option off.

## Email

If Emails have been configured to send, recipients will receive three possible emails from *no-reply@edge.csod.com*, this sender is currently not configurable. The three emails are:

- **Employee Record Changes Outbound Feed Started**
- **Employee Record Changes Outbound Feed Is Ready**
- **Employee Record Changes Outbound Feed Failed**

# Data files

The first time you run the Employee Record Change Outbound Feed the file will include all audit records from the time the Effective Dating was enabled. Subsequent runs will include audit records created after the last run (including future dated records and current changes).

Multiple files will be created with each execution of the feed:

- **Data Files:** The feed contains 2 types of data files, `modification_history` and `completed_scheduled_changes`. The `modification_history` file includes all changes made to the employee record including schedule future changes. The `completed_scheduled_changes` file contains a list of scheduled changes completed since the last feed was delivered. The data files can contain up to 1 million rows each, and any data that is over the limit will result in an additional file being added. For example, if the feed file has 2 million rows 2 files will be created. The files will be named numerically starting at 1 example: `modification_history_1.csv` (or xml)
- **Metadata:** A metadata file corresponding to each of the data files are part of the feed. The names of the files are:
  1. `Modification_history_readme.txt` (or xml)
  2. `Completed_scheduled_changes_readme.txt` (or xml)
- **Schematic Manifest:** Which describes the structure of the exported data should be included within the metadata `Schema.csv`(or `xsd`).
- **Completed Scheduled Changes:** Two files containing the list of completed scheduled changes since the last feed will be included.
  - a. `completed_scheduled_changes.csv` (or xml) - will provide the changes made to the data files.
  - b. `completed_scheduled_changes_readme.txt` - will provide the changes made to the metadata.

All files will be processed in the selected format and packaged together in a .zip file.

All exported files will be available for 21 days from date of feed run. **After 21 days the files will be automatically deleted.**

The data provided will appear in the following columns:

- |                          |                           |                     |
|--------------------------|---------------------------|---------------------|
| • Audit Id               | • Modified for (User Ref) | • Data Type         |
| • Modified date          | • Date Effective          | • Data from Value   |
| • Modified by (GUID)     | • Field Type              | • Data to Value     |
| • Modified by (User Ref) | • Field Id                | • Reason for change |
| • Modified for (GUID)    | • Field Name              |                     |

# Frequently asked questions

**Q: Who has access to install and manage the Employee Record Change Outbound feed?**

**A:** To Install and manage the feed, admins will need the following permissions: Edge Marketplace - Manage and Edge Integrations - Manage. Please note that only one feed is allowed per portal, and in the event that multiple admins make changes to the configuration page, only the latest changes will be observed.

**Q: What fields are included in the Employee Record Change Outbound feed?**

**A:** The feed captures all changes made to the employee record master data, which is made up of a combination of standard fields, User Record custom fields, employee relationships (standard and custom), and OU fields. Each field change is represented by a row on the feed.

Can I run the Employee Record Change Outbound feed for a part of my organization and select what fields to include?

When a feed is executed, it will include your entire organization and all active fields in the employee record by default; you also have the option to include inactive fields if you like. The ability to output only a part of the organization, or only specific fields, may be added in the future as an enhancement.

**Q: In which format(s) will the ODF be available?**

**A:** Feeds will be available in two formats: CSV(Comma-Separated Values) and XML(eXtensible Markup Language). When configuring a CSV feed, users will have the option of choosing between comma(,) and pipe(|) as the delimiter.

**Q: Can I configure my daily feeds to run more than once per day?**

**A:** Daily Feeds can only be scheduled to run once per day at the moment. The ability to execute the feed in other frequencies will be a future enhancement.

**Q: Are the standard Sensitive Personal Identifiable Information(SPII) fields included in the feed?**

**A:** No; all Standard Identifiable Information fields (i.e date of birth, SSN) are excluded from the feed.

**Q: Where are the feeds stored, and what's the retention policy?**

**A:** Feeds will be stored in one or two folders depending on the type of feed. Your scheduled daily feeds will be delivered to the “Chr/outbound data feed/scheduled” folder. The optional on-demand full feeds will be delivered to “Chr/outbound data feed/On Demand” folder. Files are retained for a maximum of 21 days before they are automatically removed. To access the files, you will need valid credentials and permission, as well as a FTP viewer. To obtain credentials contact your Administrator.

**Q: What is an On-Demand full feed?**

**A:** A full feed is a one time event that retrieves all record changes since effective date was turned on in a portal. It may be triggered in one of two ways. The first time a feed is generated, the system schedules a full feed and thereafter automatically switches to daily incremental feeds, where each new feed picks up where the last successful feed left off. You may request a full feed at any time, but the system will revert to incremental feeds for the next scheduled feed, picking up where the full feed left off. Please note that full feeds, due to their size and complexity, may take a while to generate.

**Q: Can I change the language the feed is delivered in? Seems like feed header is always in English?**

**A:** Although it is true that the headers of the feed are always in English, the actual values for the to-from fields are delivered in the default language for the portal. This is to make sure the format will be always the same no matter who requests the feed. To help users navigate and understand the feed, the feed will contain a schema file. That file provides the localized names for each field in the data feed as well as a description.

**Q: How can I stop or pause a feed?**

**A:** A feed may be paused for an indefinite period of time from the Edge integrations page by toggling the on/off button. If the feed is reactivated after a few days have passed, the next partial feed will be longer than usual, as it will pick up where the last successful feed left off, and include multiple days.

**Q: Will my feed execute at the exact same time every day? How long should I expect the feed to run for?**

**A:** The exact time a feed runs and how long it takes to run is determined by multiple factors such as the total number of feeds queued and the size of feeds scheduled to run at your selected time. For this reason, the actual time your feed runs may vary from one day to another, but we will make every attempt to execute it as close to your selected time as possible. As for how long a feed will take to execute, this too will vary, with the biggest factor being the size of the feed, but we expect that 90% of all incremental feeds will complete in under an hour.

**Q: Where are the files produced by the Employee Record Change Outbound feed stored and what's the retention policy?**

**A:** Files produced by the feed will be delivered to your Cornerstone SFTP site. You can retrieve the FTP path to the files through the Edge Integration Center once you install the feed. Feeds will be stored in one of two subfolders depending on the type of feed. Your scheduled daily feeds will be delivered to the /scheduled subfolder. The optional one-time full feeds will be delivered to ondemand subfolder. Files are retained for a maximum of 21 days before they are automatically removed. To access the files, you will need valid credentials and permission, as well as a FTP viewer. To obtain credentials contact your Administrator.