Rival Onboard
Bulk Imports
Template Guide

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Rival
311 W Monroe St., Suite #402
Chicago, IL 60606
U.S.A.
1 (866) 329.3363 U.S. toll free
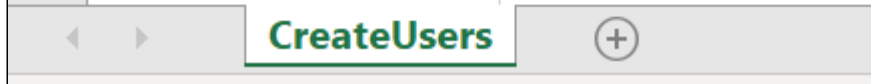Website: www-rival-hr.com

Contents

About this guide

This guide provides details about the import templates used for bulk imports in Rival Onboard. Use this guide to help you complete the bulk import templates that you download.

CreateUsers template

This section describes the CreateUsers template.

When completing a template, you can update the template file name. It is recommended that the template's file name reflects the action occurring and includes a date and time stamp so you can reference it later. However, do not modify the template's tab name. The template tab name is CreateUsers.

Basic User Profile

Unless required, all *blank* profile field columns are ignored.

Template example

Two users:

First_Name	Middle_Name	Last_Name	LoginID	SSOAuthParam	Email	Employee_HRISID	Phone Work	Phone Mobile	TerminationDate	Hire Date	ForceActiveNewHire	ForcePasswordChange	Auth Type	ApprovalManager
Owen	Alexander	Reid	Owen.Reid	owen.reid@mailinator.com	owen.reid@mailinator.com	HRISID_OwenReid	90477 78888	90455 59999	6/7/2021	6/7/2021	1	1		
Richard		Dyer	Richard.Dyer	richard.dyer@mailinator.com	richard.dyer@mailinator.com	HRISID_RichardDyer	(904)777-8888	904-555-9999	6/7/2021	6/7/2021	0	0	CUProfile	Brandon.Manager

Template columns

Template Column	Required (for an Active user)	Description	Notes
First_Name	✅	New user's first name	Optional but recommended to create a pending user
Middle_Initial		THIS FIELD IS NOT EDITABLE FROM IMPORTS. DO NOT USE.	THIS FIELD IS NOT EDITABLE FROM IMPORTS. DO NOT USE
Middle_Name		New user's middle name	
Last_Name	✅	New user's last name	Optional but recommended to create a pending user
LoginID		The value that a user uses to login to Rival Onboard.	If LoginID is omitted, Rival Onboard generates a default value of First_Name + "." + Last_Name. Example: Sally.Obrien

Template Column	Required (for an Active user)	Description	Notes
SSOAuthParam	⚠️	Required if External Authentication	SSOAuthParam is a required element if AuthType is CUProfile. Valid value is the new user's unique in the authentication system.
Email	⚠️	Customer configuration can specify this as a required field. Value is the new user's email address.	Example element syntax: <Email>Sally.O@rival-hr.com</Email>
Employee_HRISID	⚠️	Customer configuration can specify this as a required field.	Must be unique across Rival Onboard users. This field exists to cross reference a user with their ID in another (external corporate) system. Employee_HRISID is exposed in the user interface if a label is defined in the configuration. This field can be configured to be optional or required.
PhoneWork		New user's work phone number	
MobileCountryCode			Must have SMS enabled to update field. Required if profile is being opted in to receive text messages. Must provide the 1,2 or 3 digit Country Code Codes: https://countrycode.org/
PhoneMobile			When SMS is enabled the Mobile number must be added without Country Code
TimeZone			Must have SMS enabled to update field. Required if profile is being opted in to receive text messages. Valid values are: Allowed Time Zones

Template Column	Required (for an Active user)	Description	Notes
SmsOptIn			Must have SMS enabled to update field. Valid values are: 1 - Employee will be opted into receiving text messages 0 - Employee will be opted out of receiving text messages
TerminationDate		New user's termination date	Expected format is MM/DD/YYYY TerminationDate is referenced by rules that apply to your company's legal obligation to retain I-9 forms on file.
HireDate		New user's hire date	Expected format is MM/DD/YYYY HireDate is referenced by rules that apply to your company's legal obligation to retain I-9 forms on file.
ForceActiveNewHire		Identifies the user as an active or pending user.	Valid values are: 1 (one) - create an active user 0 (zero) - default - create a pending user. All required fields must be updated or user will not be created. Setting the value to 1 to create an active new employee: 1. Creates an active new employee who can immediately log in to Rival Onboard 2. Sends the corresponding emails associated with new employee 3. If an event is included in the template, the event will launch simultaneously to employee creation

Template Column	Required (for an Active user)	Description	Notes
ForcePasswordChange		Option to require a new employee to change their password the first time they log in. They are prompted for their original password, a new password, and a confirmation of the new password.	Valid values are: 1 - Employee will be forced to modify password at first login 0 - (default) Employee will be not be prompted to modify password at first log in
DoNotPurge		When set, prevents a user from being purged	Valid values are: 1 (one) - selects the Do not Purge flag 0 (zero) - de-selects the Do not purge flag
AuthType	⚠️	Default = "standard" Required if External Authentication (CUProfile)	This column is only needed when the user is not going to use the standard login. For standard Auth, leave this column blank. Valid values are: CUProfile - user will be authenticated by an application that is external to Rival Onboard
ApprovalManager		Optional for pending user Not applicable for active users	Identifies the person assigned to review the pending employee information in the Rival Onboard user interface Pending Employee List. The specific person can be identified by one of these unique identifiers: • login id • email address *If email address is not unique it is not a valid identifier

Template Column	Required (for an Active user)	Description	Notes
Custom fields from the employee profile	⚠️	Required based on custom implementation	If a custom field is created as required, it is required to be populated to successfully import an *active* employee.
			If the imported employee is a pending user, the required custom fields are not required but will have to be filled in when approving the pending user.
			If a custom field is a selection type field (drop-down list, radio button, or checkbox) the valid value is a defined field value (use the code name not a display value). The field values are case sensitive; most lists can be found within the form list page under Administration/eForms/Lists, for other values, contact Rival Support for the list values.
			Fields with special formatting must be supplied with the required formatting.
			Example: If a Personal phone number field has a validation of (###)###-####, the phone number must be added to the template as (419)555-9999.
			Fields appear for selection in the same order in which they appear on the profile.

Team Membership and Team Controller

Team elements are optional when creating a user.

Template columns

Template Column	Description	Notes
Teams:Team	Team assignment adds the user as a team member.	Team value is defined in the Manage Teams page of the Rival Onboard user interface. This column is to add a user to one team. If a user is to be added to more then one team, duplicate this column for each team that the user is to be added to. Example: Two users in the template: one is being added to two teams and the other just one team: | **Teams:Team**	**Teams:Team**
---	---
HR Coordinator	Manager
Manager		
Teams:TeamController	Team Controller adds the user as a controller of a team. A team controller can add and remove other team members from the team(s) they are controllers.	Team value is defined in the Manage Teams page of the Rival Onboard user interface. This column is to add a user as a controller to one team. If a user is to be added as a controller to more then one team, duplicate this column for each team that the user will be a controller of. Example: Two users in the template: one is being added as a controller to two teams and the other one team: | **Teams:TeamController**	**Teams:TeamController**
---	---
HR Coordinaltor	Manager
Manager		

Assignment Categories

Assignment category elements are optional when creating an user. There are three columns that need to be provided for each assignment category that is being assigned. If assigning more than one category, ALL three columns must be duplicated in the template.

Template example

Two users: one has two categories and the other only has one:

Categories:Category:Name	Categories:Category:Value	Categories:Category:Type	Categories:Category:Name	Categories:Category:Value	Categories:Category:Type
Location	Florida	Name	Jobs	0000000002	Code
Pay Grade	Hourly	Name			

Template columns

Template Column	Description	Notes
Categories:Category:Name	Identifies the assignment category name.	When working with assignment categories, the category name is what you see from the user's profile.
Categories:Category:Value	Occurs for each category defined. The Category can be looked up by name in the default language OR code. The element changes depending how the category is identified. Valid names are text as it appears under the Name column in Administration>Manage Categories. Valid codes are text as it appears under the Internal Code column in Administration>Manage Categories.	

Template Column	Description	Notes

Categories:Category:Type	This column designates what kind of value was provided: name or code.	1. Name - Name of the category value
		  • can only be used if the name is unique in the category
		2. Code - Code associated with the value
		  • each code can only be used once in each category
		  • configuration can set code as required for all category values

Key properties

Key properties can be categories, people and/or dates. You can assign more then one Key property to a user but all the associated columns must be included.

Key Property Categories

There are three columns that need to be provided for each Key Property category that is being assigned. If assigning more them one category, duplicate ALL three columns in the template as only one set is provided when creating a template.

Template example

Two users: one has two categories and the other only has one:

KeyProperties:Category:Name	KeyProperties:Category:Value	KeyProperties:Category:Type	KeyProperties:Category:Name	KeyProperties:Category:Value	KeyProperties:Category:Type
Old Department	Infrastructure	Name	Current Department	0000000020	Code
Current Job	HRMGR101	Code			

Template columns

Template Name	Description	Notes
KeyProperties:Category:Name	Identifies the Key Property category name.	When working with Key Property categories, the category name is what you see from the user's profile.

Template Name	Description	Notes
KeyProperties:Category:Value	Occurs for each category defined. The Key Property category can be looked up by name in the default language OR code. The element changes depending how the category is identified. Valid names are text as it appears under the Name column in Administration>Manage Categories. Valid codes are text as it appears under the Internal Code column in Administration>Manage Categories.	
KeyProperties:Category:Type	This column designates what kind of value was provided: name or code.	1. Name - Name of the category value • can only be used if the name is unique in the category 2. Code - Code associated with the value • each code can only be used once in each category • configuration can set code as required for all category values

Key Property People

There are two columns that need to be provided for each Key Property person that is being assigned.. If assigning more them one person Key Property, duplicate BOTH columns in the template as only one set is provided when creating a template.

Template example

Two users: one has two people and the other only has one:

KeyProperties:Person:Name	KeyProperties:Person:Value	KeyProperties:Person:Name	KeyProperties:Person:Value
Current Manager	Brandon.Manager	Old Manager	Steve.Manager@rival-hr.com
Old Manager	Steve.Manager@rival-hr.com		

Template columns

Template Name	Description	Notes
KeyProperties:Person:Name	Identifies the Key Property person name. Example: Current Manager	When working with Key Property people, the person name is what you see from the user's profile. When copying the name, ignore the team name in the (). Example when looking at a key properties on a profile you see "Current Manager (Managers)". In the template you will only use "Current Manager". You can also use the People Name column under Administration>Key Properties.
KeyProperties:Person:Value	This is the actual value that is being assigned. Example: Brandon.Manager	The specific person can be identified by one of these unique identifiers: • login id • SSO Auth Param • email address* *If email address is not unique it is not a valid identifier.

Key Property Dates

There are two columns that need to be provided for each Key Property date that is being assigned.. If assigning more them one person Key Property, duplicate BOTH columns in the template as only one set is provided when creating a template.

Template example

Two users: one has two people and the other only has one:

KeyProperties:Date:Name	KeyProperties:Date:Value	KeyProperties:Date:Name	KeyProperties:Date:Value
Start	08/01/2017	Transfer	10/01/2020
Start	02/22/2008		

Template columns

Template Name	Description	Notes
KeyProperties:Date:Name	Identifies the Key Property date name. Example: Start	When working with Key Property dates, the date name is what you see from the user's profile.
KeyProperties:Date:Value	This is the actual date value that is being assigned.	Expected format for the value is MM/DD/YYYY Example: 08/01/2017

Launching Events

You can launch an event when you create a new user. Events are configured based on your company's Rival Onboard implementation. The required event columns are based on what you defined in your implementation and your template columns must contain the necessary columns to account for all of the categories, people, and dates required to launch the event.

When a template is created, there is only one set of columns for categories, one for people, and one for dates. Each set of columns needs to be duplicated to meet the requirements for each event.

You can launch different events for each use; however, every category/date/person must be accounted for. If one user is going through an event with three categories and the other only has two, the second user will have one set of blank categories columns because they are not needed.

Template example

Two users launched into different events with three categories, two people, and one date (Example is divided up to fit the page, but would be sequential in the template.)

Event:Name	Event:Category:Name	Event:Category:Value	Event:Category:Type	Event:Category:Name	Event:Category:Value	Event:Category:Type	Event:Category:Name	Event:Category:Value	Event:Category:Type
Onboarding	All Jobs	Billing Specialist	Name	All Locations	Arizona	Name	All Departments	Benefits Administration	Name
Transfer	Old Department	0000000015	Code	New Department	Benefits Administration	Name			

Event:Person:Name	Event:Person:Value	Event:Person:Name	Event:Person:Value	Event:Person:Value	Event:Date:Name	Event:Person:Value	Event:Date:Name
Manager	Brandon.Manager			Start	6/7/2021		
Current Manager	Brandon.Manager	Old Manager	Steve.Manager@rival-hr.com	Transfer	6/7/2021	Department Training	6/8/2021

Event Name

There is one column that designate what event is being launched

Template example

Two users: One is going through an event called Onboarding and the other is a transfer event:

Event:Name
Onboarding
Transfer

Template columns

Template Name	Description	Notes
Event:Name	Identifies the name of the event being launched	This is the same event name that you see when manually launching an event.

Event Categories

There are three columns that need to be provided for each Event category that is being assigned. If assigning more them one category, duplicate ALL three columns in the template as only one set is provided when creating a template.

Template example

Two users: one has an event with three categories and the other only has two:

Event:Category:Name	Event:Category:Value	Event:Category:Type	Event:Category:Name	Event:Category:Value	Event:Category:Type	Event:Category:Name	Event:Category:Value	Event:Category:Type
All Jobs	Billing Specialist	Name	All Locations	Arizona	Name	All Departments	Benefits Administration	Name
Old Department	0000000015	Code	New Department	Benefits Administration	Name			

Template columns

Template Name	Description	Notes
Event:Category:Name	Identifies the Event category name	When working with Event categories, the category name is what you see when manually launching an event for a user.
Event:Category:Value	The value for each category defined. The Event category can be looked up by name in the default language OR code. The element changes depending how the category is identified.	
Event:Category:Type	This column designates what kind of value was provided: name or code.	1. Name - Name of the category value • can only be used if the name is unique in the category 2. Code - Code associated with the value • each code can only be used once in each category • configuration can set code as required for all category values

Event People

There are two columns that need to be provided for each Event person that is being assigned. If assigning more them one Event person, duplicate BOTH columns in the template as only one set is provided when creating a template.

Template example

Two user events: one has two people and the other only has one:

Event:Person:Name	Event:Person:Value	Event:Person:Name	Event:Person:Value
Manager	Steve.Manager@rival-hr.com		
Current Manager	Brandon.Manager	Old Manager	Steve.Manager@rival-hr.com

Template columns

Template Name	Description	Notes
Event:Person:Name	Identifies the Event person name. Example: Current Manager	When working with Event people, the person name is what you see when launching an event for a user.
Event:Person:Value	This is the actual value that is being assigned. Example: Brandon.Manager	The specific person can be identified by one of these unique identifiers: • login id • SSO Auth Param • email address* *If email address is not unique it is not a valid identifier.

Event Dates

There are two columns that need to be provided for each Event date that is being assigned.. If assigning more them one Event person, duplicate BOTH columns in the template as only one set is provided when creating a template.

Template example

Two users events: one has two dates and the other only has one:

Event:Date:Name	Event:Date:Value	Event:Date:Name	Event:Date:Value
Start	6/7/2021		
Transfer	6/7/2021	Department Training	6/8/2021

Template columns

Template Name	Description	Notes
Event:Date:Name	Identifies the Event date name. Example: Start	When working with Event dates, the date name is what you see when launching an event for a user.
Event:Date:Value	This is the actual date value that is being assigned. Example: 08/01/2017	Expected format for the value is MM/DD/YYYY

LaunchEvents template

This section describes the LaunchEvents template.

When completing a template, you can update the template file name. It is recommended that the template's file name reflects the action occurring and includes a date and time stamp so you can reference it later. However, do not modify the template's tab name. The template tab name is LaunchEvents.

For Whom

This is to provide the unique identifier value of the benefiting employee. Only *one* needs to be selected, unless using the combined columns of ForWhom_EmployeeID:EmployeeIDType and ForWhom_EmployeeID:ID as these have to be used together.

Node	Description	Notes
ForWhom_EmployeeID:EmployeeIDType ForWhom_EmployeeID:ID	These columns are used together to allow for different identifiers to be used for each user being updated.	Possible values for EmployeeIDType are: • Employee_HRISID • LoginID • SSOAuthParam • Email* *If email address is not unique it is not a valid identifier <table><tr><td>**ForWhom_EmployeeID:EmployeeIDType**</td><td>**ForWhom_EmployeeID:ID**</td></tr><tr><td>LoginID</td><td>Brandon.Employee</td></tr><tr><td>SSOAuthParam</td><td>32569874</td></tr></table>
ForWhom_LoginId	Use this when the user's login ID will be used to identify **all** user in the template.	
ForWhom_AuthParam	Use this when a login ID will be used to identify **all** user in the template.	
ForWhom_Email	Use this when a login ID will be used to identify **all** user in the template.	

Event Name

There is one column that designate what event is being launched.

Template example

Two users: one is going through an event called Onboarding and the other is a transfer event:

Name
Onboarding
Transfer

Template columns

Node	Description	Notes
Name	Identifies the name of the event being launched	This is the same event name that you see when manually launching an event.

Event Categories

There are three columns that need to be provided for each Event category that is being assigned. If assigning more than one category, duplicate ALL three columns in the template as only one set is provided when creating a template.

Template example

Two users: one has an event with three categories and the other only has two:

Category:Name	Category:Value	Category:Type	Category:Name	Category:Value	Category:Type	Category:Name	Category:Value	Category:Type
All Jobs	Billing Specialist	Name	All Locations	Arizona	Name	All Departments	Benefits Administration	Name
Old Department	0000000015	Code	New Department	Benefits Administration	Name			

Node	Description	Notes
Category:Name	Identifies the Event category name	When working with Event categories, the category name is what you see when manually launching an event for a user.

Node	Description	Notes
Category:Value	The value for each category defined. The Event category can be looked up by name in the default language OR code. The element changes depending how the category will be identified.	
Category:Value	This column designates what kind of value was provided, name, or code.	1. Name - Name of the category value • can only be used if the name is unique in the category 2. Code - Code that is associated with the value • each code can only be used once in each category • configuration can set code as required for all category values

Event People

There are two columns that need to be provided for each Event person that is being assigned. If assigning more them one Event person, duplicate BOTH columns in the template as only one set is provided when creating a template.

Template example

Two user events: one has two people and the other only has one:

Person:Name	Person:Value	Person:Name	Person:Value
Manager	Steve.Manager@rival-hr.com		
Current Manager	Brandon.Manager	Old Manager	Steve.Manager@rival-hr.com

Node	Description	Notes
Person:Name	Identifies the Event person name. Example: Current Manager	When working with Event people, the person name is what you see when launching an event for a user.
Person:Value	This is the actual value that is being assigned. Example: Brandon.Manager	The specific person can be identified by one of these unique identifiers: • login id • SSO Auth Param • email address* *If email address is not unique it is not a valid identifier

Event Dates

There are two columns that need to be provided for each Event date that is being assigned. If assigning more than one Event date, duplicate BOTH columns in the template as only one set is provided when creating a template.

Template example

Two users events: one has two dates and the other only has one:

Date:Name	Date:Value	Date:Name	Date:Value
Start	6/7/2021		
Transfer	6/7/2021	Department Training	6/8/2021

Template columns

Template Name	Description	Notes
Date:Name	Identifies the Event date name. Example: Start	When working with Event dates, the date name is what you see when launching an event for a user.

Template Name	Description	Notes
Date:Value	This is the actual date value that is being assigned. Example: 08/01/2017	Expected format for the value is MM/DD/YYYY

UpdateUsers template

This section describes the UpdateUsers template.

When completing a template, you can update the template file name. It is recommended that the template's file name reflects the action occurring and includes a date and time stamp so you can reference it later. However, do not modify the template's tab name. The template tab name is UpdateUsers.

User To Edit

This is to provide the unique identifier value of benefiting employee. Only *one* needs to be selected, unless using the combined columns of UserToEdit_EmployeeID:EmployeeIDType and UserToEdit_EmployeeID:ID as these have to be used together.

Node	Description	Notes
UserToEdit_EmployeeID:EmployeeIDType UserToEdit_EmployeeID:ID	These columns are used together to allow for different identifiers to be used for each user being updated.	Possible values for EmployeeIDType are: • Employee_HRISID • LoginID • SSOAuthParam • Email* *If email address is not unique it is not a valid identifier | UserToEdit_EmployeeID:EmployeeIDType	UserToEdit_EmployeeID:ID
---	---
LoginID	Brandon.Employee
SSOAuthParam	32569874	
UserToEdit_LoginID	Use this when the user's login ID will be used to identify **all** user in the template.	
UserToEdit_AuthParam	Use this when a login ID will be used to identify **all** user in the template.	
UserToEdit_Email	Use this when a login ID will be used to identify **all** user in the template.	

Basic User Profile

Unless required, all profile field columns left blank are ignored.

Template example

Two users:

First_Name	Middle_Name	Last_Name	SSOAuthParam	Email	Employee_HRISID	PhoneWork	PhoneMobile	TerminationDate	HireDate	ForcePasswordChange	AuthType
Owen	Alexander	Reid	owen.reid@mailinator.com	owen.reid@mailinator.com	HRISID_OwenReid	9047778888	9045559999	6/7/2021	6/7/2021	1	
Richard		Dyer	richard.dyer@mailinator.com	richard.dyer@mailinator.com	HRISID_RichardDyer	(904)777-8888	904-555-9999	6/7/2021	6/7/2021	0	CUProfile

Template columns

Template Column	Description	Notes
First_Name	User's first name	
Middle_Initial	THIS FIELD IS NOT EDITABLE FROM IMPORTS	THIS FIELD IS NOT EDITABLE FROM IMPORTS
Middle_Name	User's middle name	
Last_Name	User's last name	
SSOAuthParam	External Authentication	SSOAuthParam is a required element if AuthType is CUProfile. Valid value is the new user's unique in the authentication system.
Email	User's email address	Example element syntax: <Email>Sally.O@rival-hr.com</Email>

Template Column	Description	Notes
Employee_HRISID		Must be unique across Rival Onboard users. This field exists to cross reference an employee with their ID in another (external corporate) system. Employee_HRISID is exposed in the user interface if a label is defined in the configuration. This field can be configured to be optional or required.
PhoneWork	User's work phone number	
MobileCountryCode		Must have SMS enabled to update field. Required if profile is being opted in to receive text messages. Must provide the 1,2 or 3 digit Country Code Codes: https://countrycode.org/
PhoneMobile		When SMS is enabled the Mobile number must be added without Country Code
TimeZone		Must have SMS enabled to update field. Required if profile is being opted in to receive text messages. Valid values are: Allowed Time Zones
SmsOptIn		Must have SMS enabled to update field. Valid values are: 1 - Employee will be opted into receiving text messages 0 - Employee will be opted out of receiving text messages
TerminationDate	User's termination date	Expected format is MM/DD/YYYY TerminationDate is referenced by rules that apply to your company's legal obligation to retain I-9 forms on file.

Template Column	Description	Notes
HireDate	User's hire date	Expected format is MM/DD/YYYY HireDate is referenced by rules that apply to your company's legal obligation to retain I-9 forms on file.
ForcePasswordChange	Option to require a user to change their password the first time they log in. They are prompted for their original password, a new password and a confirmation of the new password.	Valid values are: 1 - Employee will be forced to modify password at first login 0 - (default) Employee will be not be prompted to modify password at first log in
DoNotPurge	When set, prevents a user from being purged	Valid values are: 1 (one) - selects the Do not Purge flag 0 (zero) - de-selects the Do not purge flag
AuthType	Default = "standard" Required if External Authentication (CUProfile)	This column is only needed when the user is not going to be using the standard login. For standard Auth leave this column blank. Valid values are: CUProfile - user will be authenticated by an application that is external to Rival Onboard

Template Column	Description	Notes
Custom fields from the employee profile		If a custom field is a selection type field (drop down list, radio button, or checkbox) the valid value is a defined field value (use the code name not a display value). The field values are case sensitive, most lists can be found within the form list page under Administration/eForms/Lists, for other values, you can contact support for the list values. Fields with special formatting will have to be supplied with the required formatting. Example: If a Personal phone number field has a validation of (###)###-####, the phone number must be added to the template as (419)555-9999. Fields appear for selection in the same order in which they appear on the profile.

Team Membership

Team elements are optional when updating a user.

Template columns

Template Column	Description	Notes
TeamToAdd	Team assignment adds the user as a team member.	Team value is defined in the Manage Teams page of the Rival Onboard user interface. This column is to add a user to one team. If a user is to be added to more than one team, duplicate this column for each team that the user is to be added to. Example: Two users in the template. One is being added to two teams and the other just one team: | TeamToAdd	TeamToAdd
---	---
HR Coordinator	Manager
Manager		

Template Column	Description	Notes
TeamToRemove	This removes a user from a team	Team value is defined in the Manage Teams page of the Rival Onboard user interface. This column is to remove a user from one team. If a user is to be removed from more than one team, duplicate this column for each team that the user is to be removed from. Example: Two users in the template. One is being removed from two teams and the other just one team: <table><tr><th>TeamToRemove</th><th>TeamToRemove</th></tr><tr><td>HR Coordinator</td><td>Manager</td></tr><tr><td>Manager</td><td></td></tr></table>
AddTeamController	Team Controller adds the user as a controller of a team. A team controller can add and remove other team members from the team(s) they are controllers.	Team value is defined in the Manage Teams page of the Rival Onboard user interface. This column is to add a user as a controller to one team. If a user is to be added as a controller to more than one team, duplicate this column for each team that the user will be a controller of. Example: Two users in the template. One is being added as a controller to 2 teams and the other just one team: <table><tr><th>AddTeamController</th><th>AddTeamController</th></tr><tr><td>HR Coordinator</td><td>Manager</td></tr><tr><td>Manager</td><td></td></tr></table>

Template Column	Description	Notes
RemoveTeamController	This removes a user as a team controller	Team value is defined in the Manage Teams page of the Rival Onboard user interface. This column is to remove a user as a controller from one team. If a user is to be removed as a controller from more than one team, duplicate this column for each team that the user will be removed from. Example: Two users in the template. One is being added as a controller to two teams and the other just one team:

RemoveTeamController	RemoveTeamController
HR Coordinaltor	Manager
Manager	

Assignment Categories

Assignment category elements are optional when updating a user. There are three columns that need to be provided for each assignment category that is being assigned or removed (Name/Value/Type). If assigning or removing more than one category, ALL three columns must be duplicated in the template.

Template example

For two users: one has two categories being added and the other only has one:

AddCategory:Name	AddCategory:Value	AddCategory:Type	AddCategory:Name	AddCategory:Value	AddCategory:Type
Location	Florida	Name	Jobs	0000000002	Code
Pay Grade	Hourly	Name			

Template column

Template Column	Description	Notes
RemoveAllCategories	This column removes ALL assignment columns	Valid values are: 0 - this removes all values
		When working with assignment categories, the category name is what you see from the user's profile.
AddCategory:Value	Occurs for each category defined. The Category can be looked up by name in the default language OR code. The element changes depending how the category will be identified. Valid names are text as it appears under the Name column within Administration/ Manage Categories Valid codes are text as it appears under the Internal Code column within Administration/Manage Categories	
AddCategory:Type	This column is to designate what kind of value was provided, name or code.	1. Name - the name of the category value • can only be used if the name is unique in the category 2. Code - the code that is associated with the value • each code can only be used once in each category • configuration can set code as required for all category values
RemoveCategory:Name	Identifies the assignment category name to be removed	When working with assignment categories, the category name is what you see from the user's profile.

Template Column	Description	Notes
RemoveCategory:Value	Occurs for each category defined. The Category can be looked up by name in the default language OR code. The element changes depending how the category will be identified. Valid names are text as it appears under the Name column within Administration/ Manage Categories Valid codes are text as it appears under the Internal Code column within Administration/Manage Categories	

RemoveCategory:Type	This column is to designate what kind of value was provided, name or code.	1. Name - the name of the category value
		   • can only be used if the name is unique in the category
		2. Code - the code that is associated with the value
		   • each code can only be used once in each category
		   • configuration can set code as required for all category values

Key properties

Key properties can be categories, people and/or dates. You can assign more then one Key property to a user but all the associated columns must be included.

Key Property Categories

There are three columns that need to be provided for each Key Property category that is being assigned. If assigning more than one category, duplicate ALL three columns in the template as only one set is provided when creating a template.

Template example

Two users: one has two categories and the other only has one:

SetKeyProperties:Category:Name	SetKeyProperties:Category:Value	SetKeyProperties:Category:Type	SetKeyProperties:Category:Name	SetKeyProperties:Category:Value	SetKeyProperties:Category:Type
Old Department	Infrastructure	Name	Current Department	0000000020	Code
Current Job	HRMGR101	Code			

Template columns

Template Name	Description	Notes
SetKeyProperties: Category:Name	Identifies the Key Property category name.	When working with Key Property categories, the category name is what you see from the user's profile.
SetKeyProperties: Category:Value	Occurs for each category defined. The Key Property category can be looked up by name in the default language OR code. The element changes depending how the category will be identified. Valid names are text as it appears under the Name column in Administration>Manage Categories. Valid codes are text as it appears under the Internal Code column within Administration>Manage Categories.	
SetKeyProperties: Category:Type	This column is to designate what kind of value was provided, name or code.	1. Name - Name of the category value • can only be used if the name is unique in the category 2. Code - Code associated with the value • each code can only be used once in each category • configuration can set code as required for all category values

Key Property People

There are two columns that need to be provided for each Key Property person that is being assigned. If assigning more than one person Key Property, duplicate BOTH columns in the template as only one set is provided when creating a template.

Template example

Two users: one has two people and the other only has one:

SetKeyProperties:Person:Name	SetKeyProperties:Person:Value	SetKeyProperties:Person:Name	SetKeyProperties:Person:Value
Current Manager	Brandon.Manager	Old Manager	Steve.Manager@rival-hr.com
Old Manager	Steve.Manager@rival-hr.com		

Template columns

Template Name	Description	Notes	Complete
SetKeyProperties:Person:Name	Identifies the Key Property person name. Example: Current Manager	When working with Key Property people, the person name is what you see from the user's profile. When copying the name ignore the team name in the (). Example when looking at a key properties on a profile you see "Current Manager (Managers)". In the template you will only use "Current Manager" You can also use the People Name column under Administration>Key Properties.	y
SetKeyProperties:Person:Value	This is the actual value that is being assigned. Example: Brandon.Manager	The specific person can be identified by one of these unique identifiers: • login id • SSO Auth Param • email address* *If email address is not unique it is not a valid identifier.	y

Key Property Dates

There are two columns that need to be provided for each Key Property date that is being assigned. If assigning more than one date Key Property, duplicate BOTH columns in the template as only one set is provided when creating a template.

Template example

Two users: one has two dates and the other only has one:

SetKeyProperties:Date:Name	SetKeyProperties:Date:Value	SetKeyProperties:Date:Name	SetKeyProperties:Date:Value
Start	08/01/2017	Transfer	10/01/2020
Start	02/22/2008		

Template columns

Template Name	Description	Notes
SetKeyProperties:Date:Name	Identifies the Key Property date name. Example: Start	When working with Key Property dates, the date name is what you see from the user's profile.
SetKeyProperties:Date:Value	This is the actual date value that is being assigned.	Expected format for the value is MM/DD/YYYY Example: 08/01/2017

Retire and Unretire Users

When editing a user you can mark the user as retired and terminate any active event they are the benefiter for or unretire an employee.

Template example

Two users: one is being retired and the other is being unretired.

RetireUser:TerminateEvents	UnretireUser
1	

RetireUser:TerminateEvents	UnretireUser	
	1	
Node	**Description**	**Notes**
RetireUser:TerminateEvents	Use this to retire a user and terminate any active events	Valid values are: 1
UnretireUser	Use this to unretire a user.	Valid values are: 1