

CLEAR REVIEW

# Automating User Data Imports

Automating User Data Imports into Clear Review via secure FTP

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# 1. Introduction

Clear Review enables user data CSV files to be automatically imported into Clear Review via FTP in a secure manner (i.e., more specifically, via the FTPS or SFTP protocols). Even though importing CSV user data files manually via the Find & Manage People screen is a quick and simple process, if your user data is changing frequently, setting up an automated FTP upload facility can completely automate the process of keeping your Clear Review user data up to date and in line with your HR system data.

**Important note:** With the FTP upload, there isn't an option not to send invitation emails to new users contained in the CSV import file - emails will always be sent to any new users (except if you use Single Sign On in which case no emails are ever sent to new users). Therefore, if you wish to import users into Clear Review without sending out user invitations to them yet (for example when you are setting up your system for your initial go-live), you should use the manual import facility, rather than the FTP service.

## 2. How does it work?

- You will set up your CSV data extract in your HR system as normal (see these instructions).
- You will set up an automated process in your HR system, or using a separate FTP tool that integrates with your HR system, to run the CSV extract and securely upload it to our FTP site according to a defined schedule (e.g. each night or each week).
- When a user data file is uploaded to our FTP site, Clear Review processes the file immediately and emails you the results of the import in the same way as if you had imported the file manually.

### 3. What do I need to use the FTP facility?

**Either:**

- Your HR system will need to have the ability to export CSV files to an external FTP site on automated basis. This is a common feature for mid-level and above HR software; or
- If your HR software does not have this feature, your IT department may be able to set up an automated FTP process using dedicated FTP or reporting software that integrates with your HR system.

### 4. How to set up and use the FTP facility

1. Set up your CSV user data export in your HR system following [these instructions](#) if you have not already done so.
2. In Clear Review, go to **Admin > Integrations > FTP User Data Upload Password** > Click the **Set** button.
3. Enter a password that you would like your FTP service to use to login into the Clear Review FTP server. This must be at least 9 characters long and include at least 1 number and 1 upper case character. Click the **Save password** button.

## Set your FTP Password ×

This password enables you to upload data files to Clear Review via FTP. It must have a minimum of 9 characters and include at least 1 number and 1 upper case character.

### Enter New Password

### Enter New Password (again)

Save password

**Please note:** That the FTP password is linked to the email address of the **specific admin user** who adds it. It is not an organisation-wide FTP password. Therefore, you will need to ensure that the password is set by the user whose email address you want to use to login to the FTP server. That user will also receive the import results via email each time a FTP upload is completed.

4. Setup your SFTP service to login to the Clear Review SFTP site using the following access information:
  - **SFTP Host:** sftp.clearreview.com
  - **SFTP Port:** 8822
  - **Username:** the email address of the admin user who set the SFTP password in Clear Review in Step 3 above
  - **Password:** the FTP password that was set in Step 3.
  
5. Test out your SFTP setup
  - Get your SFTP service to login to sftp.clearreview.com using the above credentials.

- Upload a correctly formatted CSV user data import file with one or two existing users in to our SFTP site.
  - The import results will be emailed to the email address used to login to our SFTP site. This should take less than a minute. The email will let you know of any errors found within the CSV data file, in the same way as if you had imported the file manually.
  - If your SFTP service is unable to login to the Clear Review SFTP site, or if you do not receive the import results email confirmation, please check our SFTP FAQ & Troubleshooting notes below, which you may need to review in conjunction with your IT. If this does not help, please contact Clear Review customer support.
- 6. Go live with your FTP service**
- Save the FTP login credentials to your SFTP service and set your data extract and SFTP upload schedule.
  - Each time your FTP service uploads a data file, an email will be sent to the email address used for the FTP service with the import results.
  - As already noted towards the top of this article, with the SFTP upload, there isn't an option not to send invitation emails to new users contained in the CSV import file - emails will always be sent to any new users (except if you use Single Sign On, in which case no emails are ever sent to new users)
  -
- 7. Changing the FTP password**
- If you wish to change your FTP password at any point, you can do so by going to: **Admin > Integrations > FTP User Data Upload Password > Click the Change button**

## 5. SFTP FAQ & Troubleshooting

### General Information:

- In SFTP, **both the initial connection and the actual file transfer both occur over port 8822**, so this port must remain open throughout the entire SFTP session including the connection and file transfer.
- We have come across some customers whose HR systems require advance knowledge of **the 'fingerprint' for our SFTP host key**, within the SFTP settings of their HR system. If needed, it's as follows (technically it's the MD5 SSH fingerprint):  
**da:5b:b7:0f:3a:2b:89:af:22:4b:36:cb:15:e9:d7:fa**
- **We don't support key-based authentication**, so this cannot be used in place of password-based authentication.
- **The externally-facing IP address of our SFTP site**, if needed for firewall whitelisting for example, is **34.246.84.151**  
However it's not possible to connect directly by IP address; your SFTP service will need to connect using the appropriate host domain as indicated in the host connection instructions above i.e.  
sftp.clearreview.com
- The **file transfer mode is best set to 'binary'** if this option is available (and not 'ASCII' as is sometimes used for text files). The UTF-8 CSV file being uploaded may contain non-ASCII special/accented characters, in which case a file transfer in ASCII mode could cause unexpected character conversions in the data being uploaded.
- **Our SFTP site does not have a file structure** as such (not even a root folder) – it simply accepts the file being transferred as an import stream and immediately discards the content after processing into Clear Review. This acts as an additional security measure to prevent import files remaining unnecessarily on intermediate storage areas, but this can cause errors with some SFTP software such as WinSCP (see below) , or potentially cause confusion during testing, if any attempt is made for example to verify the existence /properties of the 'remote' file after it has been transferred.

If your SFTP service includes an option to set a 'remote' directory, we suggest leaving this blank if you can; if it's a mandatory setting which cannot be left blank when setting up the connection to Clear Review, we suggest trying to enter the 'root' folder which usually means just entering a forward slash i.e. '/' and this may work . However, we are aware that it's not possible for some SFTP services to work at all with our SFTP site. This



can happen if :

(a) such SFTP services insist on setting a 'remote' directory ( in other words, it's a mandatory setting when setting up the connection to Clear Review SFTP site )

--- and ---

(b) the SFTP service won't initiate the file transfer if the ' remote ' directory cannot be successfully verified .

This means there is no practical way of making the SFTP transfer take place. One example of such SFTP software we are aware of is the Powershell library "Posh SSH ".

### Missing required columns:

If the following error appears in the emailed error report (or appears on - screen during a manual CSV upload):

--- Your FTP CSV data file has failed due to the following error:  
--- CSV was missing 7 required columns: approver, email, first\_name, gender, last\_name, leaving\_date, reference\_number

This can be due to the fact that the column headers (in the first row of the CSV file) have been enclosed in double-quotes i.e.

"approver", "email", "first\_name", etc. This won't show up when opening the CSV in Excel - you need to open the file in Notepad or other raw text editor.

The column headers need to remain unquoted otherwise the import process will not recognised them. When Excel saves a CSV file, it only puts double quotes if a cell contains the delimiter value i.e. a comma, so it would not normally put double quotes on the column headers which are single one- word 'strings'. However an automated export from e.g. an HRIS or other source may add quotes to the header row items anyway - in which case the script processing the CSV at the client end needs to remove all double quotes from the first row of the CSV before uploading it.

Also the column header names need to have the exact capitalisation as specified in the CSV format description and be identical character-for-character as specified in the format (so use e.g. `first_name`, and **not** `First_Name` or `first-name` or `first name` [with the underscore missing]).

## Error while setting permissions and/or timestamp:

If the following or similar error appears, particularly when using the WinSCP FTP software client:

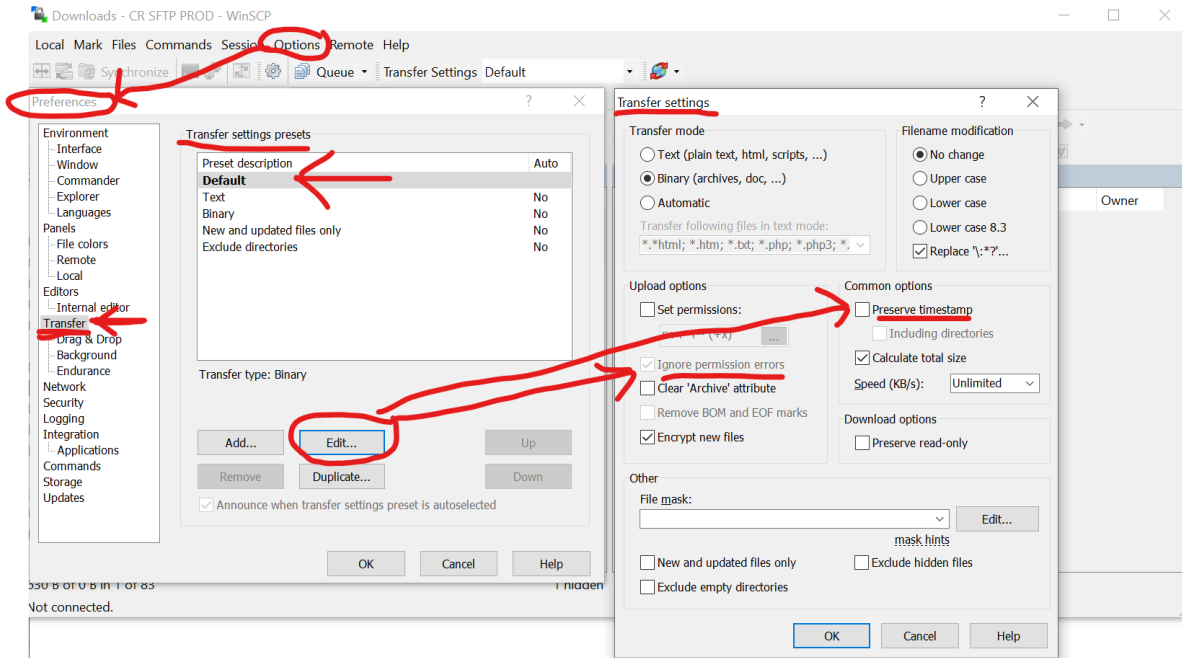
-- \*\*Upload of file 'XXXXXXXXXXXX.csv' was successful, but error occurred while setting the permissions and/or timestamp.\*\*

-- If the problem persists, turn off setting permissions or preserving timestamp. Alternatively you can turn on 'Ignore permission errors' option. ("General failure (server should provide error description)).

As indicated in the error message, it's not actually preventing the successful upload of the file, but if the error is troublesome, it can be turned off as instructed by the error message.

Please note that Clear Review immediately discards the uploaded file data after processing it as explained above (see **Our SFTP site does not have a file structure...**). This means there is no 'remote' file on which to carry out the action causing the error - the action being WinSCP trying to set the file permissions and/or or timestamp on the just-uploaded file. A screenshot is provided below showing how to access the relevant settings in WinSCP by going via menu sequence "Options -> Preferences", selecting "Transfer" tab and clicking the "Edit" button with a particular Transfer profile selected. The "Ignore permission errors" box can be ticked, then the "Preserve timestamp" box should be unticked.

Similar action may be needed with other FTP client software in response to similar errors encountered by them.






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