

# Edge Import **COMPENSATION** Starter Guide

## PRODUCT INTRODUCTION

Discover how the Edge Import makes it easier for you to load data to your Cornerstone portal.

## EDGE IMPORT OVERVIEW

Review the necessary workflow to load data.

## GET A TEMPLATE

Templates provide the necessary information for all data types to load successfully.

## CONFIGURATIONS

Configurations are used to make future loads a quick and simple process.

## LOADS

Perform a one-time bulk load of data and updates.

## FEEDS

Create automatic feeds to load your data on a recurring and scheduled basis.



## WHAT IS EDGE IMPORT?

Edge Import empowers you to take complete control of the data you upload to your Cornerstone portal. A simple and intuitive data load management tool that lets you load data in to your Cornerstone portal by creating recurring feeds and one-time bulk loads. All based on the files you provide and map yourself, so you can get results when you need them.

Edge Import lets you create templates, called Configurations in your portal. Configurations are mapped to specific data in your files to match Cornerstone's system fields and can be used for manual data loads or to map your scheduled feeds, making future loads quicker and easier.

### COMPENSATION LOADS AND FEEDS

Edge Import Compensation Loads and Feeds makes it possible to import salary data from your HRIS into your Cornerstone portal and use that information for compensation planning and reporting.



## ENABLEMENT

Edge Import Compensation Loads and Feeds need to be enabled by a Cornerstone administrator. Please submit a case to Global Product Support requesting this enablement.

## PERMISSIONS

Access to Edge Import and the use of Edge Import to upload your employee salary data are dependent on the assignment of the proper security permissions:

### **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

### **Edge Import - Load Employee Salary**

Grant ability to access employee salary data load via Edge Import

## PERMISSIONS (continued)

### Load Type & Constraints

There are no constraints available for Edge Import load type permissions.

"A client wants to restrict administrators to only be able to upload users for their Division. Is this feasible?

Edge Import is intended for use by system administrators who do not need constraints. In general, administrators with permissions for a given load type can load the data.

### Owner / Created By

All users with permissions for a given load type can view and use the configuration data (for this load type), manage data feeds or review the data logs (for this load type), independant from the fact who has created the configuration or who has loaded the data (for this load type).

#### Example:

(Both users have permissions to the same load type):

- A configuration created by Admin1 can be used by Admin2.
- A data feed and the loading results (incl. the data) created by Admin1 can be viewed by Admin2.

### One-Time Loads and Data Feeds

- Users with access to "Edge Import" can see the high level load results for all loads (Edge Import > Loads) even without having permissions to perform loads for those load types.
- However, those users can only download detailed result reports for viewing loaded/not loaded data, if the user has permissions for that load type.

#### Example:

If an admin has permissions for LMS loads only, this user can see high level load results of "Employee" data loads but will not be able to download detailed results for this load.

## EDGE IMPORT OVERVIEW

ADMIN > TOOLS > EDGE > IMPORTS AND FEEDS

The Edge Import homepage contains all necessary features to successfully create and review data mappings and feeds.

Edge Import allows you to build Configurations to quickly load data and create feeds. Configurations are the mapping guides that describe the data you want to import.

### Templates (1)

To build a Configuration it's important to have a copy of your data file to begin the mapping process. Templates contain all the necessary fields and formats for your files and are available by selecting the Get A Template Guide button.

[Key Management \(a\)](#) is available to help secure your data files with encryption.

### Configurations (2)

A Configuration describes the data you want to import. Configurations are created using data files you intend to use for future loads and feeds.

The [Recently Used Configurations \(b\)](#) section allows you to review configurations recently used to create a load or feed. Selecting a configuration will take you to the [Configuration Details page \(c\)](#).

### Loads (3)

Loads are non-recurring imports of bulk data. Loads utilize Configurations as the guides for how your files will be interpreted, validated, and imported.

The [Recent Loads \(d\)](#) section allows you to review recently created loads. Selecting a load will take you to the [Load Details page \(e\)](#).

### Feed Settings (4)

Feed Settings lets you create recurring, scheduled, automatic imports of data dropped to your Cornerstone-provided FTP. Multiple feeds can be configured, each feed able to process multiple data types.

Selecting the [Feed Runs \(f\)](#) button displays the progress and status of all imports performed by the feeds. The [Recent Feed Runs \(g\)](#) section allows you to review the most recent feeds that have processed. Selecting a feed will take you to the [Feed Details page \(h\)](#).

The screenshot shows the Edge Import homepage with a sidebar on the left containing four numbered icons (2, 3, 4, f) and a 'Get a Template Guide' button, and three main content sections on the right.

- Recent Loads (d):** Shows three completed loads: 'Online C... LMS' (File Name: LMS-Online Cou..., All Successful, COMPLETED), 'Test Trans... LMS' (File Name: LMS-Test Transcr..., All Successful, COMPLETED), and another 'Test Trans... LMS' (File Name: LMS-Test Transcr..., All Successful, COMPLETED). A 'Show only mine' checkbox is present.
- Recently Used Configurations (b):** Shows three recently used configurations: 'Test Trans... LMS' (Name: Test-Transcript-S1, Last Used: 7 Jan 2020, Admin, Cornerstone), 'Test LMS' (Name: Case 00873307, Last Used: 31 Dec 2019, Singh, Prem Kanwal), and 'Provider LMS' (Name: Provider-S1, Last Used: 20 Dec 2019, Admin, Cornerstone). A 'Show only mine' checkbox is present.
- Recent Feed Runs (g):** Shows three recent feed runs for 'caretest Feed 8':
  - Started: 31 Dec 2019, 08:00:07 EST, Run By: Schedule, Duration: 0:05:00, Status: ERROR, All files need attention
  - Started: 31 Dec 2019, 07:00:05 EST, Run By: Schedule, Duration: 0:05:00, Status: ERROR, All files need attention
  - Started: 31 Dec 2019, 06:00:03 EST, Run By: Schedule, Duration: 0:05:00, Status: ERROR, All files need attention
 A 'Show only mine' checkbox is present.

## GET A TEMPLATE GUIDE (1)

Templates are available for all data types. Even if your file comes from your HRIS, the template may be useful because it provides the necessary fields and formats that are required to upload the data to Edge Import. Selecting the Get a Template Guide button from the Edge Import homepage will open the Template Flyout.

From the Category and Type dropdown, select the Employee Salary option.

You will be asked to choose which culture should be used as a default. This option lets you select a language that will be applied as the default if no language is selected.

Once you have answered these questions, select the Download button to download and open an Excel spreadsheet.

### EXCEL TEMPLATE GUIDE

Open your downloaded spreadsheet and prepare your data following instructions in the Template Guide.

The first tab of the spreadsheet includes information and basic requirements for each column that can be mapped using the Edge Import tool. The information provided differs for each data type, but most will include the following information:

- The name of the field
- The type of data that can be entered
- Whether the field is required or optional
- A Conditionally Required field indicates that mapping this field may cause other fields to become required
- The Acceptable values for each field
- The Default values of a field if left blank
- A brief description of the field

The second tab is the Worksheet tab, where you enter the actual data that was defined in the first tab.

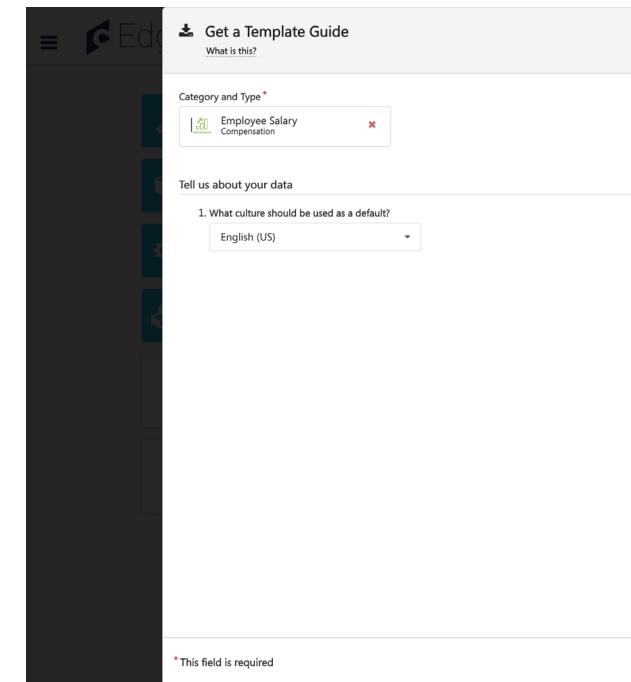
The third tab is the Considerations tab, that defines the file and field requirements for the file and load type you are creating. It is important to review and understand the requirements listed on this tab thoroughly to avoid future errors.

The tabs that follow (if any) contain pre-determined values that need to be added to specific fields within the worksheet. For example, the Language Code tab will include the acceptable values for the Default Language field.

New to Edge Import?

[Get a Template Guide](#)

Get a *Template Guide* button



Template Flyout

## KEY MANAGEMENT (a)

Key Management allows you to manage the generation of **PGP (Pretty Good Privacy) Encryption keys**. PGP provides an added layer of security to protect your organization's information. The Key Management page **Filters** allow you to **Show Only Active Keys** and/or **Show Only My Keys**.

The screenshot shows the 'Manage Keys' page. At the top right is a green button labeled '+ Create Key'. Below it are two filter buttons: 'Show Only Active Keys' and 'Show Only My Keys'. To the right of these are 'Reset' and 'Filters' buttons. Underneath is a pagination control with 'Show 25' and navigation arrows. A large central area displays the message 'No Keys to display'.

To begin, select the **Create Key** button. A flyout will appear, allowing you to give your key a **name**, then select the **Create Key** button. Your key will appear on the Key Management page, where you can select the **Download PGP Key** button. The key will download as a **.asc** file. After downloading the public PGP key, use it to encrypt the data files. Contact your internal IT department for support with encrypting the data files.

The screenshot shows a 'Create Key' flyout. It has a title 'Create Key' and a field 'Enter Key Name \*' containing 'Key 1'. At the bottom are 'Create Key' and 'Cancel' buttons.

The screenshot shows the 'Manage Keys' page again. It lists a single key named 'Key 1' with the details 'Expiry Date: 27 Dec 2021' and 'Owner: Phillip, Stephanie'. To the right is a grey button labeled 'Download PGP Key'.

### Edge Import Key Management Highlights:

- Generate and manage up to two unique PGP keys.
- Edge Import PGP keys expire every 180 days for increased security
- PGP keys generated from Edge Import can only be used for encrypting csv and text files. Encryption of Excel files is not supported.

## DATA FORMATS

To properly utilize Edge Import, specific formatting of the data you import is required. Some of the most common formatting requirements include:

### NUMBER FORMATS

Numeric values can be formatted in one of the following ways:

#### Decimals are separated with a period “.”

Examples:

- 1234.56
- 1,234.56

#### Decimals are separated with a comma “,”

Examples:

- 1234,56
- 1.234,56

#### Decimals are separated with a comma “,” and thousands are grouped with a dot “.”

Examples:

- 1.234,56
- 1.000
- 120.000
- 123.456,78

The maximum number of digits for decimal support is dependent on load type.

### BOOLEAN FORMATS

Boolean values can be delivered in one of the following ways:

#### True

1, active, on, t, true, y, yes

#### False

0, f, false, inactive, n, no, off

- Boolean values are NOT case sensitive, Example: “TRUE” or “True” or “true” are all acceptable.
- Boolean values are not localized . Example: If a French user downloads the template in French, they will see acceptable values in English.

## DATE FORMATS

Date values can be ordered in one of the following ways:

### Day First

- If your date 31 Dec 2017 is delivered as:
  - 31/12/2017
  - 31-12-2017
  - 31.12.2017

Year can also be 2 digits but will always interpreted as 19XX. It's recommended to provide 4 digits.

### Month First

- If your date 31 Dec 2017 is delivered as:
  - 12/31/2017
  - 12-31-2017

Year can also be 2 digits but will always interpreted as 19XX. It's recommended to provide 4 digits.

### Year First

- If your date 31 Dec 2017 is delivered as:
  - 2017/12/31
  - 2017-12-31

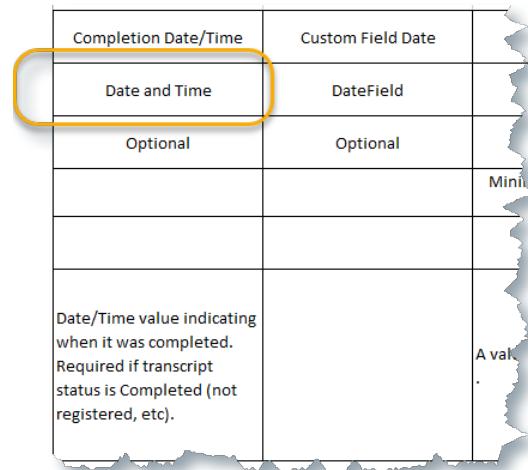
Year must be 4 digits.

## DATE/TIME FORMATS

- Date/Time values are stored in the database in UTC format.
- Acceptable format for Date/Time values:

DATE HH:MM:SS +/-UTC offset.

- Edge Import will default to UTC (00:00AM UTC) for Date/Time fields without any UTC/Offset information. Example (Month First): "05/20/2005" > "20th May 2005 00:00AM UTC".
- In the Template Guide, the field type for Date/Time fields is "Date and Time".



Completion Date/Time	Custom Field Date
Date and Time	DateField
Optional	Optional
Minimally	A val
Date/Time value indicating when it was completed. Required if transcript status is Completed (not registered, etc).	

### Date/Time Example 1 - UTC

Date/Time in file contains a time stamp in UTC

Cornerstone Portal

Date/Time for a user record in Singapore (SGT) (in Source System)	Date/Time in UTC (in File)	Date/Time in CSOD Database	User View (PST)	User View (CET)	User View (SGT)
05/20/2005 20:00:00	05/20/2005 12:00:00	05/20/2005 12:00:00 UTC	05/20/2005 (04:00 PST)	05/20/2005 (13:00 CET)	05/20/2005 (20:00 SGT)

### Date/Time Example 2 - With Offset

Date/Time in file contains a time stamp in UTC

Cornerstone Portal

Date/Time for a user record in Singapore (SGT) (in Source System)	Date/Time (in File)	Date/Time in CSOD Database	User View (PST)	User View (CET)	User View (SGT)
05/20/2005 20:00:00	05/20/2005 20:00:00 +8	05/20/2005 12:00:00 UTC	05/20/2005 (04:00 PST)	05/20/2005 (13:00 CET)	05/20/2005 (20:00 SGT)

**PST** = Pacific Standard Time (UTC-8) | **CET** = Central European Time (UTC+1) | **SGT** = Singapore Time (UTC+8)

### UTC/Offset for Date only fields?

- UTC or Offset conversations are only relevant for Date/Time fields displaying date and time in the presentation layer (user interface).
- Date fields only (without time) don't need to include a UTC/Offset value and will be imported as delivered.

### Examples:

Relevant	Not relevant
<ul style="list-style-type: none"> <li>Transcript Request Date/Time</li> <li>Transcript Registration Date/Time</li> <li>Transcript Completion Date/Time</li> <li>(...)</li> </ul>	<ul style="list-style-type: none"> <li>Hire Date</li> <li>Termination Date</li> <li>Salary Date</li> <li>(...)</li> </ul>

## Example – Date/Time values without UTC/Offset

A client is based in the USA, the LMS date/time data in their source system is stored in local date/time (PST).

Edge Import will default to UTC (00:00AM UTC) for Date/Time fields without UTC/Offset information. For example: "05/20/2005" will become "20th May 2005 00:00AM UTC" in the database.



## MULTIPLE VALUE FORMATS

- Fields that accept multiple values will accept multiple values that are separated by a semicolon. In using Excel sheets, multiple values separated by a comma are also supported.
- For fields that accept multiple values be sure to send the complete set of values. Example (Field: Topics):

### Example

If "Software Applications;Technical Skills" was provided in a first load and next time "Software Applications" is provided only, "Technical Skills" will be removed.

**Topics**

**+ Add Topic**

**Software Applications**

**Technical Skills**

## TRANSLATION & CULTURE

- For selected load types, Edge Import allows the same load type to be used for regular loads or for translation loads only.
- For translation loads only, the main record must already exist in Cornerstone.
- In selecting “Is Translation Load”, the template guide will show up only fields which are relevant for the translation load. The culture selected will be used as default.

### CULTURE

The selected culture drives the language in which the Template Guide instructions and field acceptable values (for localized standard and custom fields) will show.

**Tell us about your data**

- Is translation load?**  
 Yes  No
- What culture should be used as a default?**  
 English (US)

### TEMPLATE GUIDE

- Only the fields flagged with “Able To Translate” remain in the Template Guide.
- An additional “Translation Culture” field will be made available.
- The “Able to Translate” field indicates if a field is localized and can be translated with Edge Import.the complete set of values.

Field Name	Online Course Name*	Online Course Description	Keywords	Online Course ID*	Translation Culture
Field Type	Text	Text	Text	Text	Culture
Required/Optional	Required	Optional	Optional	Required	Optional
Acceptable Values	Min Length: 1, Max Length: 500	Max Length: 2000	Max Length: 1000	Min Length: 1, Max Length: 100	<a href="#">Get Language Code</a>
Default Value					en-US
Able To Translate	Yes	Yes	Yes		
Field Description	This is the display name of the Online Course in the catalog.	This is the description of the Online Course. This field supports HTML tags.	Multiple keywords can be separated using semicolon. When a user searches and enters any of the keywords specified here, the course title will appear in the search results (assuming that the learning object is available to the user).	The ID of the Online Course	This value is used as the culture for the individual record. If this value is committed, the default culture of the configuration will be selected.

The culture selected will be used as default.

### The data for translation loads can be provided in different ways:

Translation load file with one record per language.

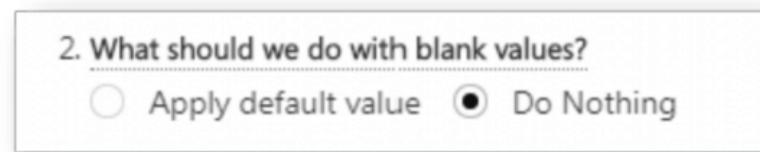
Subject Ref	Title	Translation Culture
Acc	Gestion de compte	fr-CA
Acc	Kontoführung	de-DE
Acc	Gestión de cuentas	es-ES
(...)	(...)	(...)

A translation load file with all records as per default language selected. In this example, the default language selected was Spanish.

Subject Ref	Title
Acc	Administración de cuentas
Accl	Acelerar las ventas
AppM	Matemáticas Aplicadas
AppS	Estadísticas aplicadas
(...)	(...)

## SET DEFAULTS

- Edge Import simplifies the way to set “Default” values and control the “Blank overwrite” behavior.
- Default values can be system defined values or blank. These details can be found in the template guide.
- For selected load types, there’s an option available how to manage default values. Note: If this option is not available on creating a Configuration, the default will be: “Do Nothing”.



Preference Selected	Value in File	Value in Cornerstone	System defined Default value	Result
Apply Default Value	Value 1	Blank	Blank	Value 1
	Value 2	Value 1	Blank	Value 2
	Blank	Value 2	Blank	Blank
	Value 1	Blank	Value 3	Value 1
	Value 2	Value 1	Value 3	Value 2
	Blank	Value 2	Value 3	Value 3
Do Nothing	Value 1	Blank	Blank	Value 1
	Value 2	Value 1	Blank	Value 2
	Blank	Value 2	Blank	Value 2
	Value 1	Blank	Value 3	Value 1
	Value 2	Value 1	Value 3	Value 2
	Blank	Value 2	Value 3	Value 2

## CUSTOM FIELDS

- Data loads to custom fields are supported by default (unless otherwise specified).
- Custom Fields will be either automatically added to the template guide based on your portal configuration or will be made available as a dedicated load type.
- The following custom field types are NOT supported:
  - Hierarchy
  - Branched Dropdown
  - Conditional Numeric Field
- Default values will be set for blank, unmapped, or invalid Custom Fields that are of types:
  - Dropdown, Radio Button, Multi-Checkbox

### Example:

OPTIONS

Please define additional options for this field by clicking on the add icon. Use drag and drop to order the options.  
 Set "Select" as default option.

Name	Active	Default	Remove
France	<input checked="" type="checkbox"/>	<input type="radio"/>	
USA	<input checked="" type="checkbox"/>	<input type="radio"/>	
Canada	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	

Default Value

Template Guide

Field Name	Favorite Country
Field Type	Dropdown
Required/Optional	Optional
Conditionally Required	
Acceptable Values	France, USA, Canada
Default Value	Canada

**Required/Optional Custom Fields**

- Edge Import respects changes made from the portal for field requiredness. Field can be changed from optional to required and vice-versa.
- The field required/optional setting changes will not impact the Configuration Snapshot of past loads when field was required/optional.
- Template Guide always shows fields based on portal configuration at the time of download.

**Scenario 1:**

A file is imported with a configuration which contains field(s) whose requiredness has changed.

- If an unmapped field is now required, then the load attempt (via manual load or feed) fails with an error message.
- If a mapped field is now required, the load will process and return an error if value was not provided for required field.

**Scenario 2:**

When the configuration contains a field whose requiredness is changed, the Configuration Details page will show the mapping as it was saved, but with the following exceptions:  
If an unmapped field is now required, then the load attempt (via manual load or feed) fails with an error message.

- If an unmapped field is now required, it will appear as required in the UNMATCHED list. This scenario will also apply if new required field is added.
- If a mapped field is now required, as usual in the mapping table, that field will be shown with an asterisk (\*).

## CONFIGURATIONS (2)

A Configuration is a guide that describes the data you want to import and how the system should interpret, validate, and import that data. Configurations are used to create Loads and Feeds.

Before getting started, make sure you have a data file from which to create your configuration. This can be created from a Cornerstone-provided Template or from a 3rd-party vendor.

Once your data is ready, you can create a Configuration by selecting the “Configurations” link on the Edge Import page.

The screenshot shows the 'Configurations' page with the following details:

- Header:** Shows the breadcrumb path 'Home > Configurations' and a 'New Configuration' button.
- Search and Filter:** Includes a 'Show' dropdown set to 25, navigation arrows, and a 'Filters' button.
- Configuration List:** Three configurations are listed:
  - Employee Salary Compensation:** Name: PremTest-Case00821839, Last Used: 8 July 2019, 20:45:05 EDT, Owner: Singh, Prem Kanwal.
  - Employee Salary Compensation:** Name: ChiTemplate, Last Used: 10 Apr 2019, 23:11:55 EDT, Owner: Gou, Chi.
  - Employee Salary Compensation:** Name: testa, Last Used: Never.

The Configurations page lists the configurations created by your organization. Selecting an already built configuration allows you to observe the settings used to create the configuration. It is not possible to edit a configuration once it has been created, though it is possible to delete the configuration.

## CREATE A NEW CONFIGURATION

To create a new configuration, select the New Configuration button. There are four steps to creating a configuration:

1. Upload
2. Options
3. Mapping
4. Save

### 1. Upload

From the Category and Type dropdown, select the Employee Salary option.

Next, add a copy of your data file. Drag and drop the file to the center of the page, or use the Pick a File button to select the file from your computer.

*Note: Only Excel, CSV, and text file types are supported. Text files may be comma, tab, or pipe delimited. When uploading a PGP encrypted file, ensure file name extension also has .pgp or .gpg.*

*Uploaded files used for configurations have a size limit of 20MB.*

Select the Upload button to process the file.

### 2. Options

The Options step allows Edge Import to read and validate your data based on the uploaded file.

If using an Excel file, specify which worksheet has the necessary information. In the Cornerstone-provided template, this is the Worksheet. You will also need to specify if your file includes column headers.

You will then need to answer several questions related to Employee Salary and data formatting. The responses to the presented questions will dictate how the system interprets and imports data records.

Once you've answered the questions, select the Next button.

This field is required

Cancel **Upload**

Configurations - Upload Page

This field is required

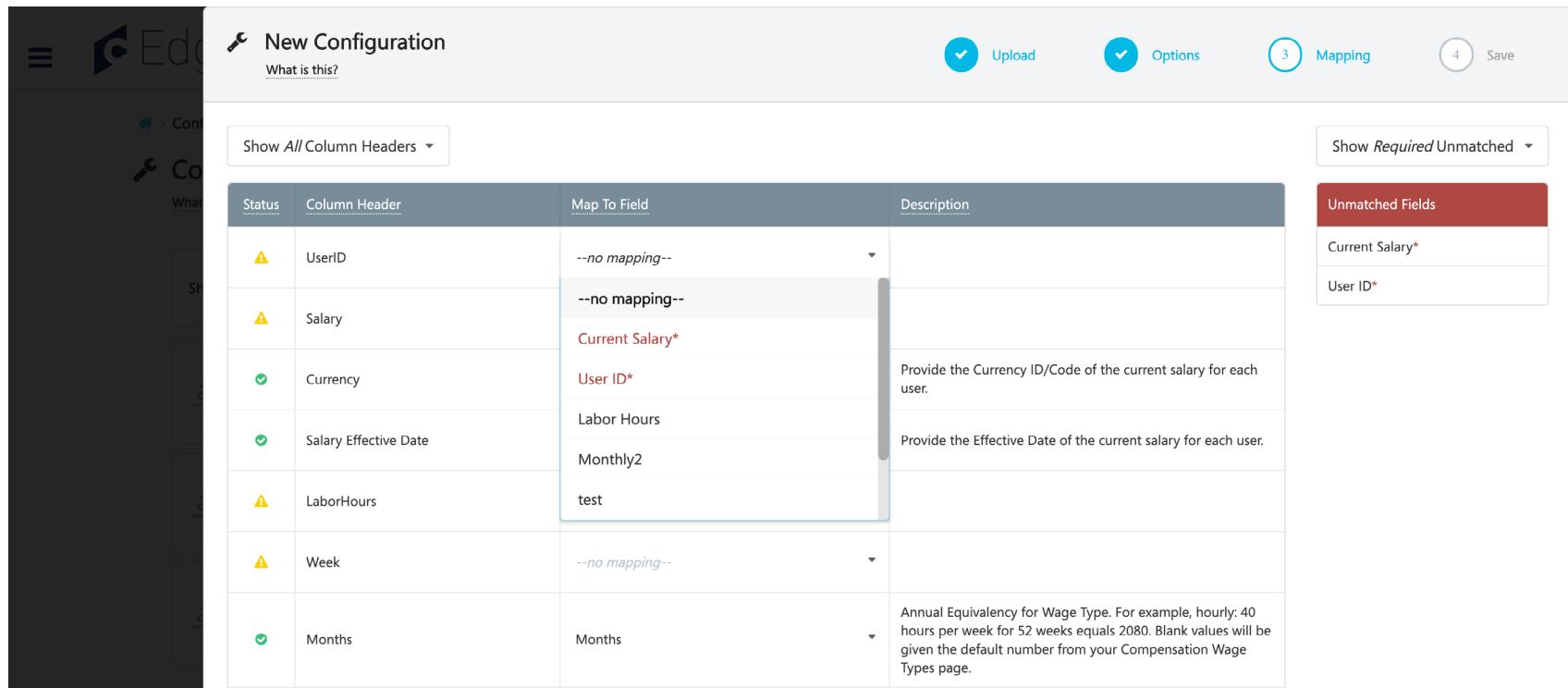
Cancel **Next**

Configurations - Options Page

## EXCEL TEMPLATE GUIDE (continued)

### 3. Mapping

On the Mapping page you associate or “map” the data columns in your uploaded file to the system fields. Edge Import reviews your file and automatically matches the fields that it recognizes.



The screenshot shows the 'New Configuration' page with the following details:

- Header:** 'New Configuration' with a 'What is this?' link, 'Upload' (with a checkmark), 'Options' (with a checkmark), 'Mapping' (with a value of 3), and 'Save' (with a value of 4).
- Table Headers:** Status, Column Header, Map To Field, Description.
- Data Rows:**
  - User ID:** Status is yellow warning. Column Header is 'UserID'. Map To Field dropdown shows '--no mapping--'. Description: 'Provide the Currency ID/Code of the current salary for each user.'
  - Salary:** Status is yellow warning. Column Header is 'Salary'. Map To Field dropdown shows '--no mapping--'. Description: 'Provide the Effective Date of the current salary for each user.'
  - Currency:** Status is green success. Column Header is 'Currency'. Map To Field dropdown shows 'Current Salary\*' and 'User ID\*'. Description: 'Provide the Currency ID/Code of the current salary for each user.'
  - Salary Effective Date:** Status is green success. Column Header is 'Salary Effective Date'. Map To Field dropdown shows 'Labor Hours' and 'Monthly2'. Description: 'Provide the Effective Date of the current salary for each user.'
  - LaborHours:** Status is yellow warning. Column Header is 'LaborHours'. Map To Field dropdown shows 'test'. Description: 'Annual Equivalency for Wage Type. For example, hourly: 40 hours per week for 52 weeks equals 2080. Blank values will be given the default number from your Compensation Wage Types page.'
  - Week:** Status is yellow warning. Column Header is 'Week'. Map To Field dropdown shows '--no mapping--'. Description: 'Annual Equivalency for Wage Type. For example, hourly: 40 hours per week for 52 weeks equals 2080. Blank values will be given the default number from your Compensation Wage Types page.'
  - Months:** Status is green success. Column Header is 'Months'. Map To Field dropdown shows 'Months'. Description: 'Annual Equivalency for Wage Type. For example, hourly: 40 hours per week for 52 weeks equals 2080. Blank values will be given the default number from your Compensation Wage Types page.'
- Unmatched Fields:** A red box highlights 'Unmatched Fields' with entries: 'Current Salary\*' and 'User ID\*'. There is also a 'Show Required Unmatched' dropdown.

- The Column Header field lists the headers from the file you downloaded.
- Use Map to Field to associate your data to the Cornerstone system fields. If a field is not recognized, either select a field or type in the system field name in the “Map To Field” column drop-down. An asterisk indicates that a system field must be mapped to a column in your file.
- To the right of the page, toggle Unmatched Fields to show just the “Required Unmatched fields” or “all Unmatched” fields.

Once you have mapped your fields, select the Next button.

## EXCEL TEMPLATE GUIDE (continued)

### 4. Save

To finalize your configuration, give it a name and select the Save button.

You will be directed to the Configurations Details page to review the settings and mapping, or delete the configuration.

New Configuration  
What is this?

Save this configuration

Enter a name for this configuration.\*

\* This field is required

Configurations - Save Page

## RECENTLY USED CONFIGURATIONS SECTION (b)

The Recently Used Configurations section of the Edge Import homepage displays your organization's most recently used configurations, with the option to filter down by the loads you have created.

A quick overview of the configuration is displayed. This includes:

- The type of configuration
- The name of the configuration used
- The date the configuration was used
- Who created the configuration

Clicking a Configuration will take you to the Configuration Details page for that load.

## CONFIGURATION DETAILS PAGE (c)

The Configuration Details page provides information related to your selected configuration. This page is divided in to three tabs and includes a New Load button to use the configuration for a one-time data load.

The Overview tab displays high level info about this configuration.

The Options tab provides the responses to the questions asked during the creation of the configuration. These responses determine how the system interprets and imports data records.

The Mapping tab lets you review the association between column headers in the file that will be uploaded to the portal and system fields. Letting you ensure the correct fields are mapped properly.

Configurations - Employee Salary  
What is this?

Employee Salary

Overview Options Mapping

Category and Type  
 Employee Salary Compensation

Date Last Used  
• Load Never  
• Feed Never

Feeds that Use this Configuration (0)  
This configuration is not used in any feeds

Delete this configuration

Configuration Details Page

## LOADS (3)

To create a one-time import of bulk data, select Loads from the Edge Import Homepage.

The screenshot shows the 'Loads' page with the following details:

File Name	Started	Status
Compensation-Employee...	31 July 2019, 11:56:52 EDT	COMPLETED All Successful
Compensation-Employee...	25 July 2019, 15:23:29 EDT	COMPLETED All Successful
Compensation-Employee...	25 July 2019, 15:15:57 EDT	COMPLETED All Successful

The Loads page lists the loads created by your organization. Selecting a load allows you to observe the Load Details page for information related to the configuration used and the success status of the load.

## CREATE A NEW LOAD

To create a new load, select the New Load button.

The screenshot shows the 'New Load' interface. At the top left is a breadcrumb navigation: 'Loads > New Load'. Below it is a title 'New Load' with a 'What is this?' link. The first section is 'Category and Type' with a dropdown menu showing 'Employee Salary Compensation'. The second section is 'Configuration' with a dropdown menu showing 'No configurations available' and a 'New Configuration' button. The third section is 'Key' with a dropdown menu showing 'Select a Key'. The final section is 'Select File' which includes a large input field for dragging and dropping files, a 'Pick a File' button, and a link 'or load a file from FTP'.

- From the **Category and Type** drop-down menu, select the data type that applies to the data you are loading.
- From the **Configuration** dropdown, select the Configuration you created for the data type, or select the New Configuration button to create one.
  - Once you select a Configuration, you can select Modify to review and change the Options and Mapping for this load only. When finished, select the Use Modified Configurations button. It is important to know that these modifications will not save to the Configuration.
- If your file has been encrypted with a PGP generated in the **Key Management** page, select the matching **key**.
  - Only active PGP keys will be available for selection.
  - If PGP file is uploaded and PGP key selected does not match, an error will display.
- Drag and drop** the file to the center of the page, or use the **Pick a File** button to select the file from your computer.

Notes: The file type, sheet name, and header names for columns in your file need to match those mapped in the Configuration. The maximum file size that can be used for a data load is 25 GB.

Only Excel, CSV, and text file types are supported. Text files may be comma, tab, or pipe delimited. For an Excel file, only one sheet can be loaded at a time.

## CREATE A NEW LOAD (continued)

### File from FTP

You also have the option to "load a file from FTP". Use this option to open an FTP File Path and enter the path of your file in the Cornerstone-provided FTP directory.

If the file you are loading is located in the main FTP directory, provide only the file name.

If a file is located in a subfolder, specify the path to that folder and include the file name as shown on the screen.

The Check File button verifies that the specified file exists within the FTP.

[Click here](#) to learn more about accessing your Cornerstone-provided FTP.

FTP File Path \*

Check File

or upload a file

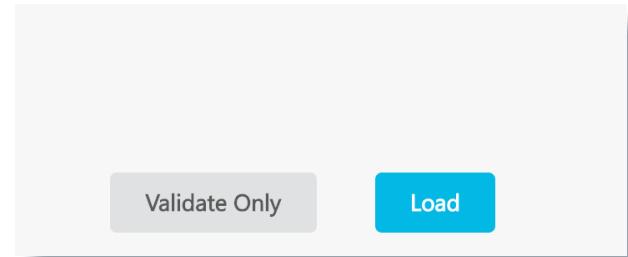
*File from FTP*

### Validate Only and Load

Once your file has been loaded, you have two options Validate Only and Load.

The Validate Only option directs you to the Load Details page, where the system validates your data so you can ensure the file is configured correctly. On this page you will also have the option to Load your data in to the system

The Load button directs you to the Load Details page, where the system validates your data and, if validated successfully, uploads the data.



*Validate Only and Load options*

## RECENT LOADS SECTION (d)

The Recent Loads section of the Edge Import homepage displays your organization's most recent data loads or validations, with the option to filter down by the loads you have created.

A quick overview of the load is displayed. This includes:

- The type of load
- The name of the file loaded
- The date the load began
- Who initiated the load
- How many/if any errors
- The status of the load

Clicking a load will take you to the Load Details page for that load.

## LOAD DETAILS PAGE (e)

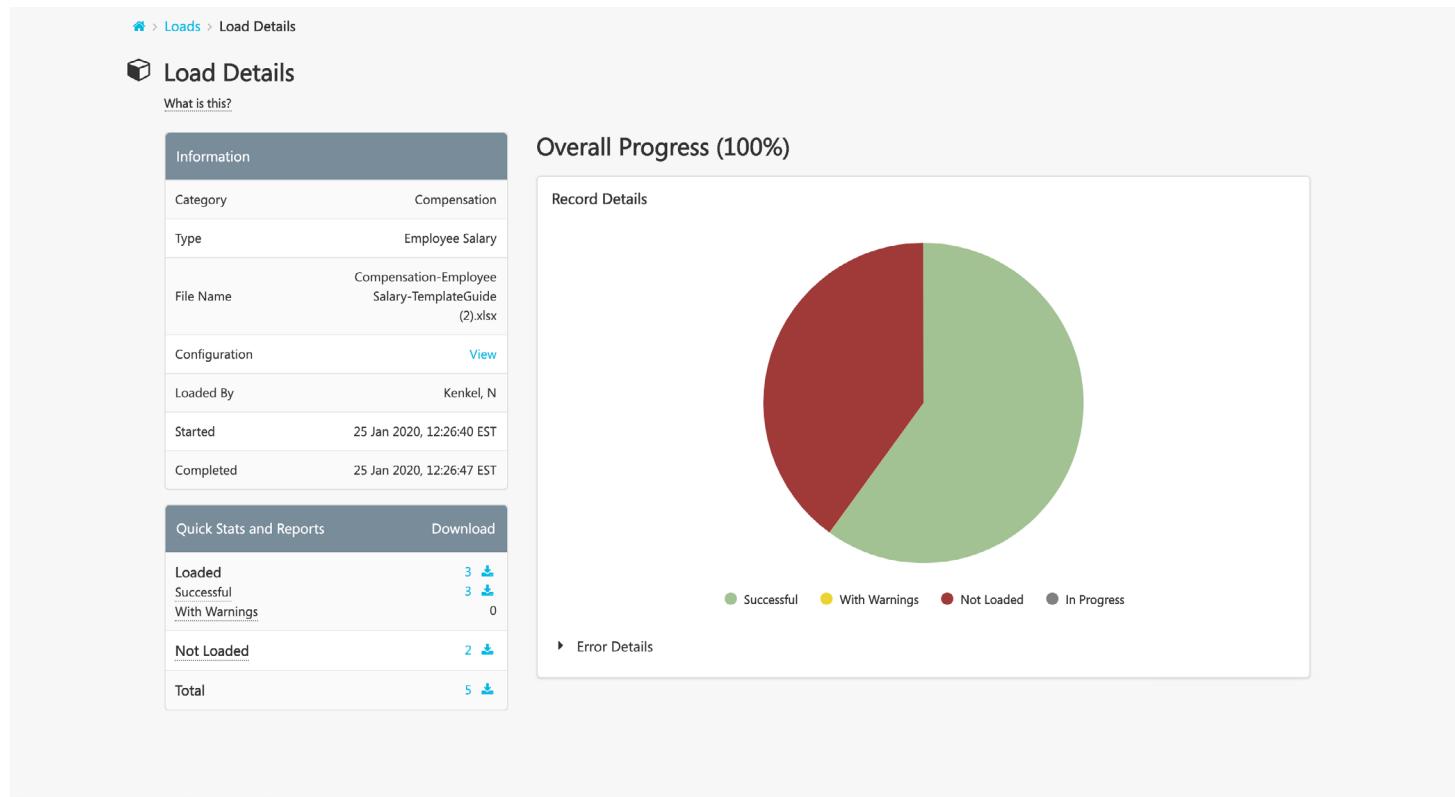
The Load Details page provides a summary of the selected load.

The information section displays specific details associated with this load.

You can download individual reports with details from the Quick Stats and Reports section. Within the report, error/warning columns have detailed messages to help identify the data issues. The columns and data are in the same format as originally provided. You can rectify the record as needed and perform desired action.

This area visually indicates the progress and count of records in each status. You will notice a bar graph when data is processing. Once completed, the data has finished processing and the data will be in a pie chart with final counts.

This section only appears if your records have any errors or warnings and shows how many fields have the same type of error.



## FEEDS (4)

To ensure your Cornerstone portal has the most up-to-date data, you can create data feeds that import one or more files on a scheduled basis. These files are typically generated by an HRIS or third-party vendor and placed on your Cornerstone-provided FTP. To create a recurring data feed, select Feed Settings from the Edge Import Homepage.

The screenshot shows the 'Feed Settings' page with the following details:

- User & OU Feed - 1:**
  - State: Enabled
  - Frequency: Hourly
  - Next Run: 16 Jan 2020, 11:00:00 EST
  - Last Run: 31 Dec 2019, 08:00:07 EST
  - Run By: Schedule
- User & OU Feed - 2:**
  - State: ▲No active files
  - Frequency: ▲Schedule not saved
  - Next Run: Not Applicable
- User & OU Feed - 3:**
  - State: ▲No active files

The Feeds Settings page lists the feeds created by your organization. Selecting an existing feed allows you to observe the Feed Details page for information related to how the settings and schedule are configured.

## CREATE A NEW FEED

To create a new feed, select the Create Feed button.

### 1. Overview

In the Overview tab, edit the name of the feed by selecting the pencil icon, entering a new name, and selecting Enter on your keyboard.

Selecting the Change FTP Path link lets you change the path on your Cornerstone-provided FTP that Edge Import will finds the delivered files.

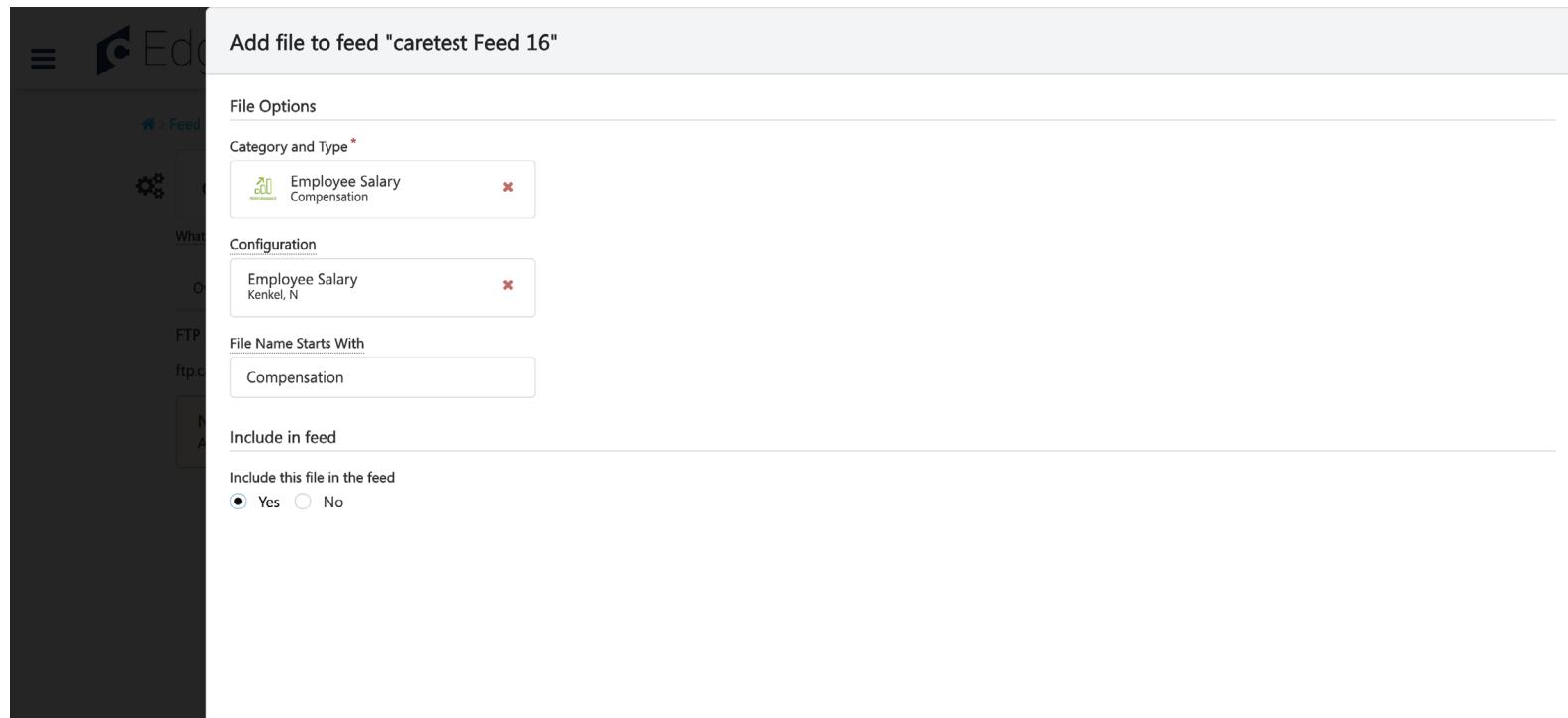
If the other tabs have not been completed for this feed, you will find the options for them available on the Overview page, as well as the date the feed last ran, the date it will run next, and the Status of the feed.

## CREATE A NEW FEED (continued)

### 2. File Setup

The File Setup tab lets you designate one or more data files to import simultaneously based on a schedule.

Select the Add File button to open the Add File Flyout.



- From the Category and Type dropdown select the Employee Salary data type.
- The Configuration dropdown lists all configurations built by your organization for this data type.
- The File Name Starts With field is where you will enter the name of the file you will be delivering to the FTP.
  - If the file name will not change for future loads, enter the full file name. *For example, Salaries.csv*
  - If the file name changes for each load, for instance, the current date is added to the end of filename each day it's loaded to the FTP site, only enter the prefix for the file. *For example, Salaries*
- In the Include this file in the feed section, select Yes to activate the file. If No is selected, the file will not be processed by the feed.

When finished, select the Add File button. You may select the added files to make edits or Remove the file from the feed.

## CREATE A NEW FEED: FILE SETUP (continued)

Multiple files can be added to a feed and process at the same time.

Once files are added, you will see the Run Feed and Check Files buttons.

- The Check Files button validates that the files are present on the FTP and displays a Green check if present or Red X if files are missing.
- The Run Feed button manually triggers the feed and processes the files from the FTP.

## 3. SCHEDULING

The Scheduling tab lets you define when and how often your feed will automatically process. This is convenient because many 3rd-party HRIS systems can be set to automatically deliver your data files to the Cornerstone-provided FTP at a recurring schedule. This allows you to align the timing between your various products.

*Keep in mind that there may be a delay between when your HRIS begins delivering files to the FTP and when those files have finished uploading and are ready for Edge Import to process.*

Select the Set Schedule button to open the Set Schedule Flyout. There are four frequency options to choose from, each with unique scheduling preferences:

- Hourly - let you define the number of hours between each time your feed processes.
- Daily - is for feeds that only need to run once a day, letting you decide the time and in what timezone that your feed will begin processing.
- Weekly - lets you determine which days of the week, the time, and in what timezone that your feed will begin processing.
- Monthly - is for feeds that only need to run once a month. You can decide which day of the month based on numeric value (4th day of the month) or relative value (third Sunday of the month). You can also select the time and timezone for the selected day that your feed will begin processing.

The Summary section will display the next five run times based on your selections.

When finished, select the Save Schedule button to continue. On the Scheduling tab you will now have Change Schedule tab that makes it easier to adjust your schedule as needed.

### FTP Location

ftp.carettest.csod.com/EdgelImport/Feed10

▶ Run Feed

Check Files

Run Feed and Check Files buttons

**Set Schedule**

Frequency

How often should this feed run?

Hourly  Daily  Weekly  Monthly

Hourly Schedule

Run every  hour at  past the hour

Summary

Next five run times based on this schedule

16 Jan 2020, 10:00:00 EST  
16 Jan 2020, 11:00:00 EST  
16 Jan 2020, 12:00:00 EST  
16 Jan 2020, 13:00:00 EST  
16 Jan 2020, 14:00:00 EST

\* This field is required

Scheduling Flyout options

## CREATE A NEW FEED: FILE SETUP (continued)

### 4. Notifications

The Notifications tab lets you define who will receive communications regarding the feed's status. Click the Add Notification to open the Notification Flyout.

- In the recipient Email field, enter the email address for a single user who should receive notifications.
- Select the status that triggers the email. You can select multiple statuses for a single recipient. Statuses include:
  - » Feed Start
  - » Feed Error
  - » Feed Complete
  - » Feed Stuck
  - » Key Expiration
- Set the "Enable this notification" option to Yes to activate the notifications for this recipient.

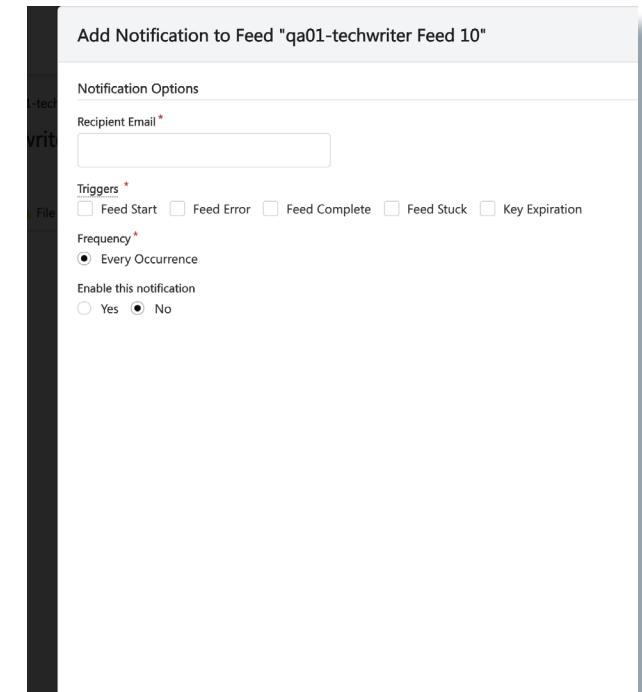
If Key Expiration is selected:

- 30 days before the key expires, there will be a message in the normal feed emails (start/error/complete/stuck) to notify key expiration.
- 14 days before the key expires, there will be a Key expiration email triggered that will be delivered every day until it expires.
- If the key expires and the file continues to run without a new key, error message will be seen in the feed run details and in the feed complete/error emails.

Select the Add Notification buttons to save the notification. Select a created notification to update or remove the notification from the feed.

Only one recipient can be entered with each Notification. However, you can create multiple Notifications to accommodate the need for multiple recipients.

The email contains an overview about the latest scheduled data load and a link to Edge Import for more details.



*Notification Flyout options*

## 5. Encryption

If your files will be encrypted with a PGP generated in the **Key Management** page, select the matching **key**.

## 6. Change Log

The Change Log tab to review the modifications made to the feed, including who made changes, when the change was made, and the specific modification made.

Use the filters button to narrow down the results of the log by the Area Changed and the user who made the change.

## 7. Activation

Once all required tabs have been configured, the Activate toggle will appear next to the name of your feed. By default, the feed is off until you activate it. When the toggle is blue, the feed is Active.

Files cannot be added or changed while the feed is enabled. To make changes to the Feed, set the Active toggle to off.

The screenshot shows a list of five log entries in a table format:

Action	Date	Details	Associated Area
Feed Name Changed	25 Jan 2020, 12:31:41 EST	caretest Feed 16	→ Salaries
Notification Added	25 Jan 2020, 12:31:28 EST	[notification added]	Recipient Email: jjtest@test.com Triggers: Feed Complete Frequency: Every Occurrence Included in feed: true
Schedule Set	25 Jan 2020, 12:31:16 EST	[schedule set]	The feed is scheduled to run every 1 hour at 0 minutes past the hour
File Added	25 Jan 2020, 12:31:09 EST	[file added]	Type: Employee Salary File Name: Compensation Included in feed: true Configuration Name: Employee Salary Configuration Owner: Kenkel, N
Feed Created	25 Jan 2020, 12:28:07 EST		

## FEED RUNS (f)

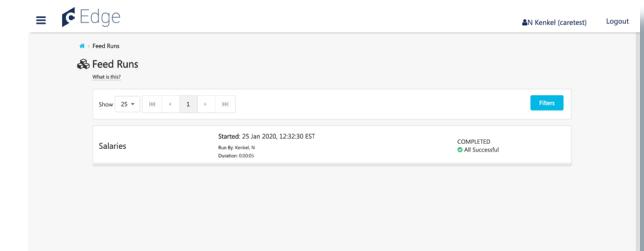
The Feed Runs page allows you to see the progress and status of all imports performed by feeds.

Use the filter button to easily find specific runs by its status or the person who ran the feed.

Once you've found the specific run, select it to view the Feed Details page.

### Edge User

- Scheduled data feeds will be performed with a special system User: **Edge User**.
- The Edge User is the user who will be visible in the Audit & Modification histories.
- The Edge User cannot be accessed from Admin > Users page, so no edits can be performed for this user.
- Field permissions are not accounted, the Edge User has full access to all fields.



Feed Runs page

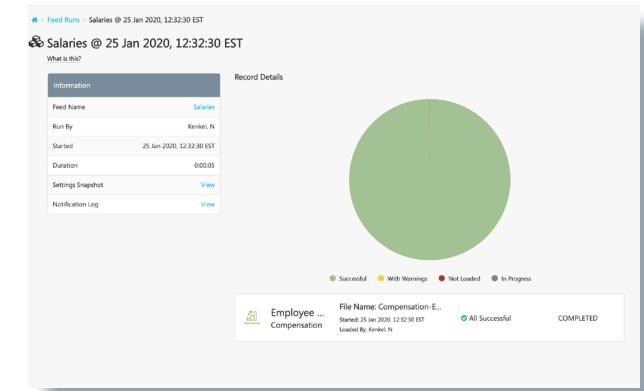
## RECENT FEED RUNS SECTION

The Recent Feed Run section on the Edge Import homepage displays your organization's most recent data feed runs, with the option to filter down by the runs you have manually initiated.

A quick overview of the feed is displayed. This includes:

- The name of the feed
- The date and time the feed began processing
- Who initiated the feed run, either an individual user or by schedule
- How long the feed took to process
- The status of the load.

Clicking a feed will take you to the Load Details page for that load.



Feed Run Details page

## FEED RUN DETAILS PAGE

The Feed Run Details page lets you view the status and results of the feed run

The Information section displays the details related to this feed.

The Record Details section indicates the progress and count of records from all files in this feed run. When data is processing a bar graph is displayed show the progress. Once the data has finished processing, the results of the feed run will display in a pie chart with a final count of the run status.

## APPENDIX

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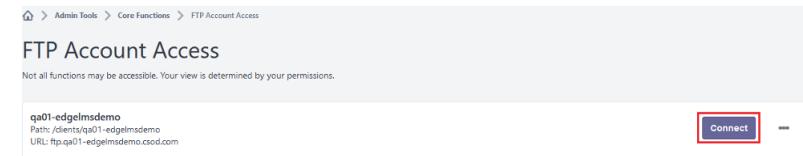
### FTP ACCESS

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

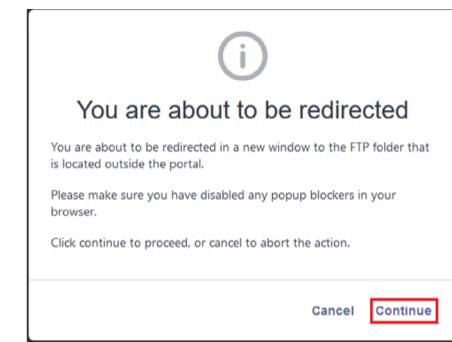
1. Navigate to *Admin > Tools > Core Functions > FTP Account Access*
2. Click Connect.
3. A pop-up message will appear indicating that you will be redirected to another site outside of your Cornerstone portal and advising you to disable pop-up blockers, click Continue.
4. After clicking continue, you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

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

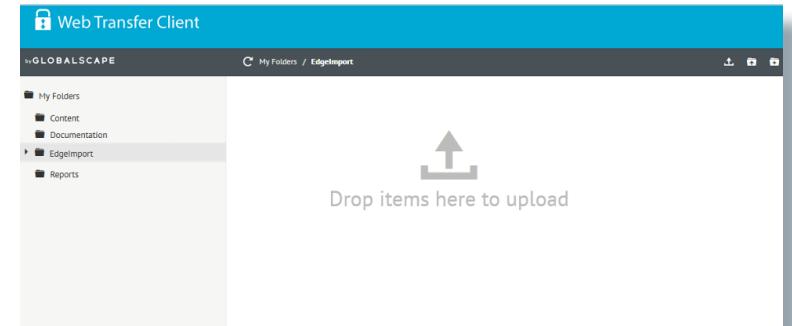
Review [Online Help](#) for more information about permissions and managing access to your Cornerstone-provided FTP directory.



FTP Account Access page



Redirect pop-up



The Web Transfer Client

## MIGRATION FROM DLW

The DLW Migration tool makes it easy to transfer your existing feeds and templates from the Data Load Wizard (DLW) to Edge Import. From the Home page of Edge Import, select the DLW Migration option.

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

Configurations and Feeds in Edge Import that were migrated from DLW will be flagged to let you know where they originated.

### Some considerations to keep in mind:

- Only active DLW feeds can be migrated to Edge Import.
- Only templates that meet one of the following conditions will be available to migrate to Edge Import:
  - Template has been used at least once in the last 90 days OR
  - Template is used in an active DLW feed
- If a DLW template has multiple equivalent loads in Edge Import, the user will be presented a choice to migrate the template to each one of the corresponding configurations in Edge Import. For example, in the DLW, there's only one transcript load. However, in Edge Import there are six transcript loads. In such cases, the user will have the option to migrate the template to any or all of the six Edge Import configurations.
- A user can only migrate templates for which they have the corresponding permissions in Edge Import. For example, a user must have the 'Access CHR - Employee Load' permission to migrate User DLW templates to Employee Edge Import configuration.
- A user can only migrate templates and feeds for which there are corresponding Edge Import loads and feeds respectively. For example, a user will not be able to migrate a Requisition template to Edge Import.

Template	Last Updated	Owner	Configurations Migrated
Division	21 Feb 2020, 16:00:00 PDT	Admin, Comerica	0 of 1 Configurations migrated
PC/Mac	21 Feb 2020, 17:00:00 PDT	Admin, Comerica	0 of 1 Configurations migrated
Position	21 Mar 2020, 17:00:00 PDT	Admin, Comerica	0 of 1 Configurations migrated
Transcript	21 Mar 2020, 17:00:00 PDT	Admin, Comerica	0 of 6 Configurations migrated

*DLW Migration Page*

File	Status
Division	Configuration Imported
User	Do not add this file to the feed
Position	Do not add this file to the feed

*Import Feed Flyout*

## DEEP LINKING

- "Data Feed Settings" and "Data Feed Runs" pages have unique Deep link URLs.
- This URL can be shared to communicate settings or load results with any CSOD user.
- This URL can also be used to report issues with Product Support.