cornerstone

Edge Import Performance
Loads and Feeds

Edge Import is a robust, intuitive data load tool that enables customers to manage their data loads in a self-service manner. With Edge Import, customers have the ability to map, validate and load data into their Cornerstone application using flat files. Customers can also set up data feed to automatically load these flat files such as employee or transcript data from an external system into the Cornerstone application.

Cornerstone Edge Import CSX

Table of contents

Overview

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 load and feed types can be enabled for all clients who have migrated from Data Load Wizard (DLW) load and/or feed or purchased Edge Import by contract.

Edge Import Performance Loads and Feeds makes it possible to import **performance review data and update for existing standard and off-cycle review tasks**, **assign users to performance tasks**, **goals**, and **load salary data** from your HRIS into your Cornerstone portal and use that information for compensation and performance planning and reporting.

Data load types

This section of the guide provides an overview of the available load types within the **Performance** category of Edge Import, to help you get started.

When performing data loads, it is important to remember that more comprehensive information related to usage and formatting considerations, field mapping, and requirements can be found on the [template](#) of each load type.

	A	B	C	D	E	F	G	H	I	J
1					Performance-Reviews Load					
2		A performance review, also called a performance appraisal or performance evaluation, is a formal assessment in which evaluator evaluates an employee's work performance, identify strengths and weaknesses, offer feedback, and may set goals for future performance, amongst other actions. This Load covers Overall Rating and PDF load.								
3		Please refer to the considerations when creating your files.				File Format Considerations	Data Format Considerations	Performance-Reviews Load Considerations		
4		Use the worksheet to create your import file, columns will be automatically mapped while you create a configuration				Go to the Worksheet				
5										
6										
7	**Field Name**	Task ID*	Task Title	User ID*	Review Task Start Date*	Review Task End Date*	Score	PDF Name		
8	**Field Type**	Integer	Text	Text	Date and Time	Date and Time	Number	Text		
9	**Required/Optional**	Required	Optional	Required	Required	Required	Optional	Optional		
11	**Acceptable Values**	Minimum: 1	Min Length: 0, Max Length: 100	Min Length: 1, Max Length: 100						
12	**Default Value**									
15	**Field Description**	Unique identifier for the performance review task.	Name of the review task.	User ID is the unique identifier of the user.	Enter Performance Review Start Date for the record.	Enter Performance Review End Date for the record.	Overall Performance Rating of User.	Review PDF Name to be loaded for the user.		
16										
17	* This field is required									
18										
19										
20	This file was generated at: 2/14/2022 9:27:00 PM UTC									
21										
22										
23										
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Review Load

Permission to perform this load: Edge Import - Load Review scores and pdfs

A performance review, also called a performance appraisal or performance evaluation, is a formal assessment in which evaluator evaluates an employee's work performance, identify strengths and weaknesses, offer feedback, and may set goals for future performance, amongst other actions.

This load allows assigning, and updating Overall Rating and PDF load for existing review tasks.

When creating an Review Load configuration in Edge Import, you will be able to select whether the review task is a standard task or an off cycle task.
- **Standard Task** - A fixed periodic evaluation.
- **Off cycle task** - Performance review based on ad hoc basis.

Setup
To use the Review Load for Edge Import to updat scores and pdfs, there are several considerations to be taken into account for the review that your are creating:
- A Standard/ Off cycle Performance Review Task must be created in the portal prior to loading review scores and/or PDFs
- The Review Task must be assigned to at least 1 User or OU in the Availability section of the task setup (it is recommend using a dummy user to protect from the task start date hitting and being assigned to an actual user)
- The Review Task should only contain one "Review Step"
- This "Review Step" should have a single section of type "Sign Off Section" assigned to Self only
- Review Task should use scoring scale that aligns with ratings that will be loaded
- "Ensure that Rating Scale configured for the task does not include Custom Rounding Ranges". Rating Scale with Custom Rounding Ranges are not supported for load.
- Loading historical ratings and/or PDFs will mark the task to complete. However if Task end date is in the future, the Task status will move back to In Progress and will move to complete after the dates used in Task setup

Considerations
- This load type is only available for one-time data loads, it is not availalbe for scheduled feeds.
- In your file, provide the **PDF Name** if you wish to upload a PDF file to a user's performance review.
    - The actual file will need to be present on the CSOD FTP site, in the dedicated **PerformanceHDL/ReviewsPDF** folder.
    - PDF files will NOT be automatically removed from the FTP after the one-time load.

- Load Date would be the Completion Date of records.
- Scores should match the rating scale configured in the given performance task. If numeric scores are provided for load, ensure values are numeric only. For Text Rating, ensure the exact text values as per scale is provided in data file.
  - If a text score is provided after choosing a numeric option for the load, the score would be excluded from the load and will be shown as a warning message.
- For Off cycle review load, **Recurrence** refers to the number of times a user has been assigned this review. Ensure that the recurrence value added in a load is unique for a user. Edge Import will overwrite data for existing recurrence value.
  - The Recurrence value should not exceed 999

Review Score Load

Permission to perform this load: Edge Import - Load Review scores and pdfs

This load gives administrators the ability to upload rating score of reviewees for multiple tasks at a time. It can be utilized for below task configurations:
- Standard and Off cycle Tasks
- No limitation to number of review steps
- No limitation to number or kind of sections in a review step
- Task status can be not started, in progress, or completed.

Considerations
- This load type is only available for one-time data loads, it is not availalbe for scheduled feeds.
- If a rating score already exists for the user, uploading via this template will override it with provided values
- This template can be utilized for any kind of review task setup
- Rating score can also be uploaded for multiple review tasks in a single load

User Goals

Permission to perform this load: Edge Import - User Goal Load

Goals allow users and managers to set action-oriented tasks and track results. Previously, bulk uploading of goals was not self-service, it required a project to complete.

This load allows allows administrators to create and assign goals with no tasks or targets to users.

Considerations

- This load type is only available for one-time data loads, it is not availalbe for scheduled feeds
- Goal Status and Progress updates will reflect current status and progress instead of default portal values
- The Goal ID for the goal you create needs to be unique
- Goal Weight will display per precision value set in the portal instead of being rounded to the nearest whole digit
- Depending on the portal configuration, the maximum number of goals may be restricted. Edge Import load, ignores this limit
- Only a single Perspective can be associated with a goal
- Only a single Category can be associated with a goal
- Goals can be imported in locked status. Edge Import will display a warning if locked goals are present in the load when goal locking is not configured in the portal.

Employee Salary

Permission to perform this load: Edge Import - Load Employee Salary

The Employee Salary reflects the base pay that an employee is paid by their employer for the work they do.

This load allows allows administrators to upload records of employee salaries.

Considerations

- Multiple salary records can be loaded per user using seperate rows. The most recent Salary Effective Date will become the current salary.

Salary Structure

Permission to perform this load: Edge Import - Load Salary Structure

This load allows you to import Salary Structures for Compensation in bulk via manual loads or scheduled feeds using Edge Import. With this load, customers can import multiple records, containing data such as minimum, maximum, and market salary values by wage type, and the combination of up to three organizational units (OUs). Feeds are supported with this new load type.

Employee Compensation

Permission to perform this load: Edge Import - Load Employee Compensation

The Employee Compensation reflects the other ways that employees can be paid for their work.

This load allows allows administrators to upload records of employee salaries.

Considerations

- This load type is only available for one-time data loads, it is not availalbe for scheduled feeds.
- Multiple salary compensation records can be loaded per user using seperate rows. This can include multiple records for the same Compensation Type. The most recent Effective Date will become the current record for that user's compensation type.
  - Ensure each row is unique. If duplicate records are provided - the first record will be loaded and the other records will error

Individual Target

Permission to perform this load: Edge Import - Load Individual Target

This load allows you to import individual targets for Compensation in bulk via manual loads or scheduled feeds using Edge Import. With this load, customers can import records containing bonus and equity target values by user and target date. Feeds are supported with this load type.

Considerations

- The Currency field is optional. If no currency is provided and a currency is mapped to the employee at the user record level, then the individual target is imported using the user's currency. If no currency is provided and no currency is mapped to the employee at the user record level, then the portal's default currency is used.

Competency

Permission to perform this load: Edge Import - Competency Bank Load

Edge Import Competency is a tool that streamlines competency management processes within organizations. Its primary value lies in its ability to efficiently load or update competency data with ease. Two types of Competency loads are available. One is designed to load Competency general information and the other associated Behaviors or Items to Competencies.
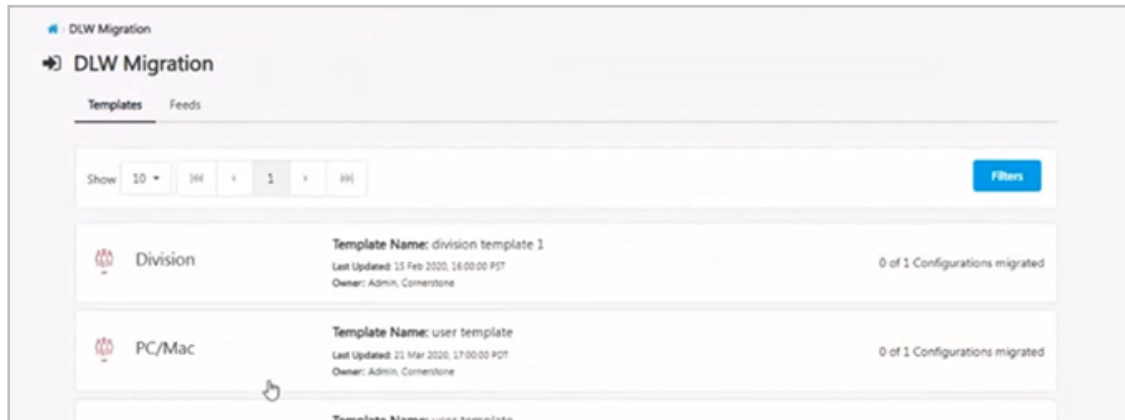
Considerations

- If new competency general information is only loaded, the competencies will not be visible until Items or behaviors are associated.
- Only active categories for Competency Category Types are fetched in template.
- Edge Import Competency can only update a competency if the competency is not associated with a locked Skills Matrix role or Competency is contained within a model which is used in a locked Task/Checklist.

Appendix

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.

Frequently Asked Questions (FAQs)

Select this link to access Frequently Asked Questions related to Edge Import in the Knowledge Central.