



# Edge Import

## Starter Guide

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.

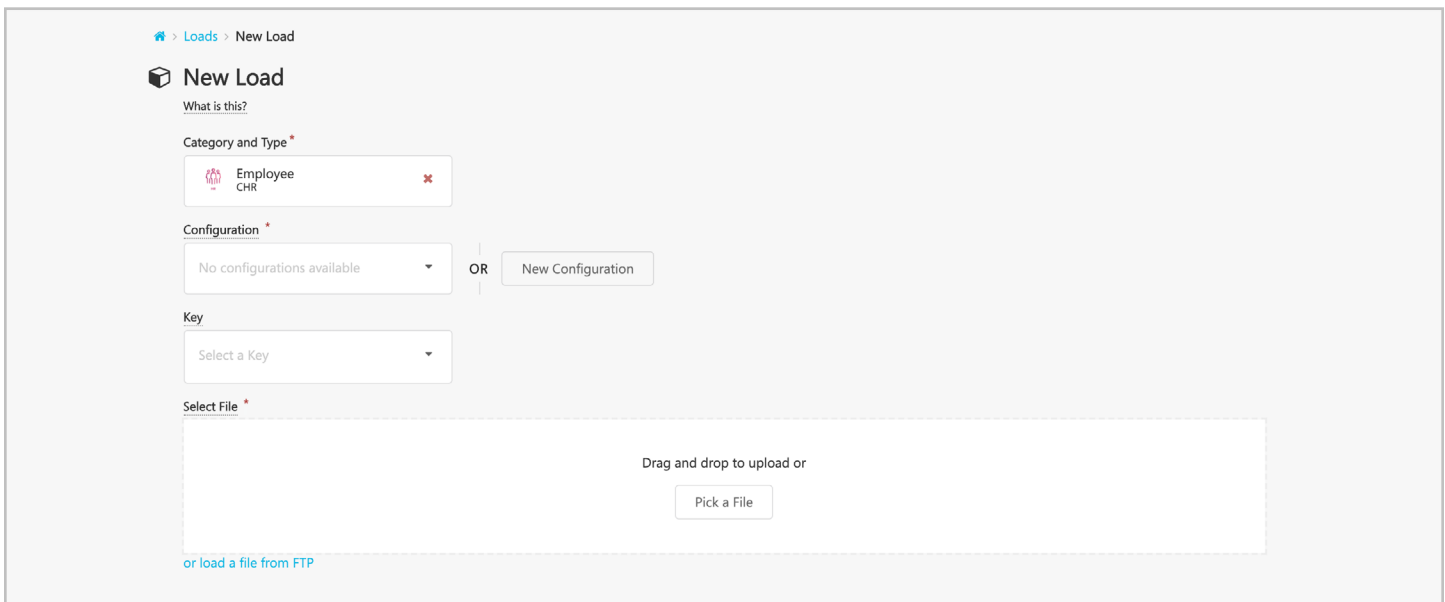
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# Getting started

## What is Edge Import



The screenshot shows the 'New Load' form in the Cornerstone portal. The breadcrumb navigation at the top reads 'Home > Loads > New Load'. The form title is 'New Load' with a sub-link 'What is this?'. The 'Category and Type' section has a dropdown menu showing 'Employee' and 'CHR'. The 'Configuration' section has a dropdown menu showing 'No configurations available' and a 'New Configuration' button. The 'Key' section has a dropdown menu showing 'Select a Key'. The 'Select File' section has a large dashed box for file upload with the text 'Drag and drop to upload or' and a 'Pick a File' button. At the bottom, there is a link 'or load a file from FTP'.

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 into your Cornerstone portal by creating recurring feeds and one-time bulk loads. All based on the files you provide and map yourself, Edge Import allow you to reliably load data in bulk without compromising the stability of the portal.

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.

A complete list of available loads and feeds can be found in [Cornerstone CSX Online Help](#).

# Step 1: Enablement

Enablement of Edge Import is possible by selecting the Edge Import on the **Edge Marketplace** (Admin > Tools > Edge > Marketplace).

## Pilot / Stage

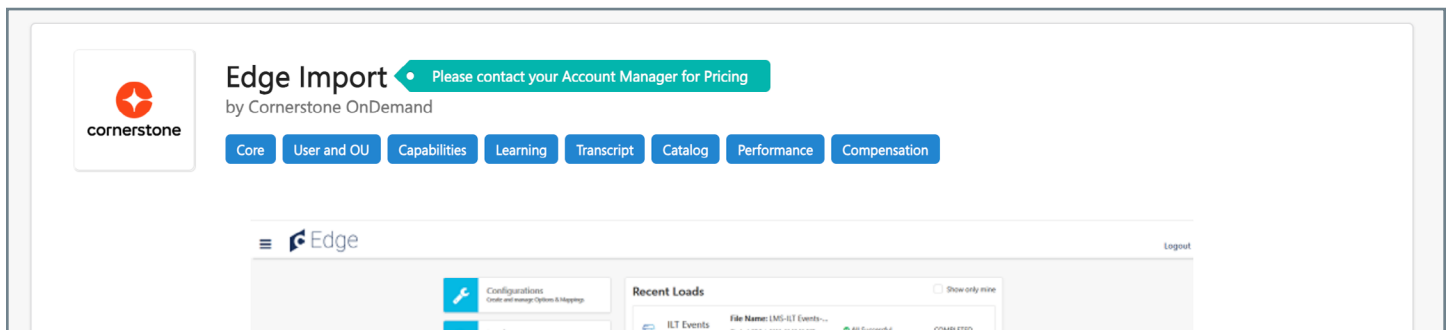
Integrations in the pilot or stage environments can be enabled for no cost, for testing purposes. Click on the **Install** button and **agree to the terms and conditions**.

Enablement of Edge Import is possible by selecting the Edge Import on the **Edge Marketplace** (Admin > Tools > Edge > Marketplace).

After the functionality has been tested and validated, you may enable Edge Import in your Production portals by selecting the Purchase button within the Marketplace tile, and access it to setup the configurations. However, if you have DLW: User/OU enabled, you will need to disable it prior to using Edge Import for employee and OU data processing. Check out the [Edge Import: Core Migration Guide](#) for detailed instructions.

## Production

To install the integration in your production environment, reach out to your **Cornerstone account manager** for pricing. They will install the integration for you upon purchase.



Purchasing this product grants you access to all the load types supported currently in Edge Import, as well as new loads that may be added in the future. If you have already purchased one of the Edge Import loads, you will not be charged again when you enable a subsequent set of loads.

For example, if you have already purchased 'Edge Import: Core' and in the future wish to use 'Edge Import: Learning Loads', you will need to again contact your Account Manager. This allows Cornerstone to enable the Learning specific loads. However, **you will not be charged** for the Learning loads since you already purchased the Core loads.

Enablement will make Edge loads available to:

- Cornerstone Administrator (GCS)
- Service Tech Admin (Partner admin)
- System Administrator (client system admin)

## Step 2: Security Permissions

**Security Permissions** grant access to certain functionality in the system, while also allowing administrators to restrict access to certain data.

Security Roles, their permissions and users assigned are controlled in **Security Role Administration** (*Admin > Tools > Core Functions > Security Role Administration.*) [Find more information about Security Role Administration in Online Help.](#)

Permissions are automatically assigned to the System Administrator role, they can be assigned to the necessary roles by assigned system administrators.

### **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

### **Set up Feed**

Enables administrator to access Feed Settings to create/update feeds and schedule feed runs.

### **Manual Run Feed**

Grants ability to check files in FTP and run feed manually.

### **Enable/Disable Feeds**

Grants ability to activate or deactivate Feeds from running as per Schedule in Feed Settings.

In addition, specific Edge Import loads may require certain permissions to be enabled. Please reference [Cornerstone CSX Online Help](#) for the permissions for a specific load.

## Load Details Reports

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.

By default, a user with the permission to perform a load is able to download the import results report from the Load Details page for load performed by anyone in your organization.

To restrict the downloading of reports to only the loads performed by a user, an optional security permission, **Download Reports Access when portal opts-in for Restrict reports access - Edge Import**, can be enabled by contacting Global Customer Support.

Once activated, users WITHOUT this permission cannot download import result reports for loads created by others, limited only to loads performed by themselves.

Users WITH this permission in their security role will be able to download import reports for loads performed by others.

## 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), independent from the fact who has created the configuration or who has loaded the data (for this load type).

**For 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.

# Edge Import overview

Once enabled, Edge Import can be accessed by navigating to ADMIN > TOOLS > EDGE > IMPORTS AND FEEDS

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

The screenshot displays the Edge Import homepage interface. On the left is a sidebar with navigation options: 2 Configurations (Create and manage Options & Mappings), 3 Loads (Initiate and review one time data imports), 4 Feed Settings (Create and manage scheduled imports), f Feed Runs (View the results of scheduled imports), a Key Management (Generate and manage encryption keys), Bulk API History (View the history of imports performed via Bulk API), A DLW Migration (Migrate your DLW templates and feeds into Edge Import), and 1 New to Edge Import? (Get a Template Guide). The main content area is divided into three sections: Recent Loads (d), Recently Used Configurations (b), and Recent Feed Runs (g). Recent Loads (d) shows three completed imports: 'Online C... LMS', 'Test Trans... LMS', and 'Test Trans... LMS', all with status 'All Successful' and 'COMPLETED'. Recently Used Configurations (b) shows three configurations: 'Test Trans... LMS', 'Test LMS', and 'Provider LMS', with their last used dates and owners. Recent Feed Runs (g) shows three failed runs for 'caretest Feed 8', all with status 'ERROR' and the message 'All files need attention'. Callouts a-h are placed over various elements: a over Key Management, b over Recently Used Configurations, c over the first configuration item, d over Recent Loads, e over the first load item, f over Feed Runs, g over Recent Feed Runs, and h over the first feed run item.

**2** **Configurations**  
Create and manage Options & Mappings

**3** **Loads**  
Initiate and review one time data imports

**4** **Feed Settings**  
Create and manage scheduled imports

**f** **Feed Runs**  
View the results of scheduled imports

**a** **Key Management**  
Generate and manage encryption keys

**Bulk API History**  
View the history of imports performed via Bulk API

**A** **DLW Migration**  
Migrate your DLW templates and feeds into Edge Import

**1** **New to Edge Import?**  
[Get a Template Guide](#)

**Recent Loads** **d** ☐ Show only mine

Icon	Name	File Name	Status	Completed
	Online C... LMS	LMS-Online Cou...	All Successful	COMPLETED
	Test Trans... LMS	LMS-Test Transcr...	All Successful	COMPLETED
	Test Trans... LMS	LMS-Test Transcr...	All Successful	COMPLETED

**Recently Used Configurations** **b** ☐ Show only mine

Icon	Name	Last Used	Owner
	Test Trans... LMS	7 Jan 2020, 04:16:10 EST	Admin, Cornerstone
	Test LMS	31 Dec 2019, 16:53:51 EST	Singh, Prem Kanwal
	Provider LMS	20 Dec 2019, 04:35:04 EST	Admin, Cornerstone

**Recent Feed Runs** **g** ☐ Show only mine

Feed Name	Started	Run By	Duration	Status
caretest Feed 8	31 Dec 2019, 08:00:07 EST	Schedule	0:05:00	ERROR All files need attention
caretest Feed 8	31 Dec 2019, 07:00:05 EST	Schedule	0:05:00	ERROR All files need attention
caretest Feed 8	31 Dec 2019, 06:00:03 EST	Schedule	0:05:00	ERROR All files need attention

## **DLW Migration (A)**

For clients using Data Load Wizard (DLW) ready to transition their configurations to Edge Import, check out the [Edge Import: Core Migration Guide](#) for detailed instructions.

## **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)**

Edge Import lets you create templates, called **Configurations** in your portal. Configurations are the mapping guides that describe the data you want to import. 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. 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. An unlimited number of feeds can be configured, each feed is 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 \(h\)](#).



# Get a Template Guide (Step 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.

- Select the **Get a Template Guide** button from the Edge Import homepage will open the Template flyout.
- From the **Category and Type** dropdown, select the type of data to import.
- Each data type will have a series of **questions** about the data you want to map. These questions differ based on the type of load you are creating. Some common questions you may encounter include:
  - *Is this a translation load?* - A translation load lets you set localizations for text fields related to Organizational Units.
  - *What culture should be used as a default?* - Lets you select a language that will be applied as the default if no language is selected.
  - *What is the unique identifier you are providing?* - Allows you to choose the ID your file uses to identify the user. For example, a user may have either a User ID or Globally Unique Identifier (GUID).

1440px x 900px

Get a Template Guide  
[What is this?](#)

Category and Type \*

Employee  
CHR

Tell us about your data

1. What is the primary identifier?  
☒ User ID ☐ Globally Unique Identifier (GUID)

2. What culture should be used as a default?  
English (US)

- 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

CHR-Employee									
This load supports maintaining employees' organizational information, employment information, personal information, user relations, and custom fields.									
Key points:									
Please refer to the considerations when creating your files.									
Use the worksheet to create your import file, columns will be automatically mapped while you create a configuration									
Field Name	User ID*	Local System ID	Prefix	First Name*	Middle Name	Last Name*	Suffix	Username	Approver
Field Type	Text	Text	Text	Text	Text	Text	Text	Text	Text
Required/Optional	Required	Optional	Optional	Required	Optional	Required	Optional	Optional	Optional
Conditionally Required									
Acceptable Values	Min Length: 1, Max Length: 100	Min Length: 1, Max Length: 100	Max Length: 10	Min Length: 1, Max Length: 200	Max Length: 200	Min Length: 1, Max Length: 200	Max Length: 10	Min Length: 1, Max Length: 128	Min Length: 1
Default Value									
Field Description	Unique identifier for the user	Specify the User Id from a third party vendor that needs to be maintained in Cornerstone	Prefix	First Name	Middle Name	Last Name	Suffix	Username	Approver
* This field is required									

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.

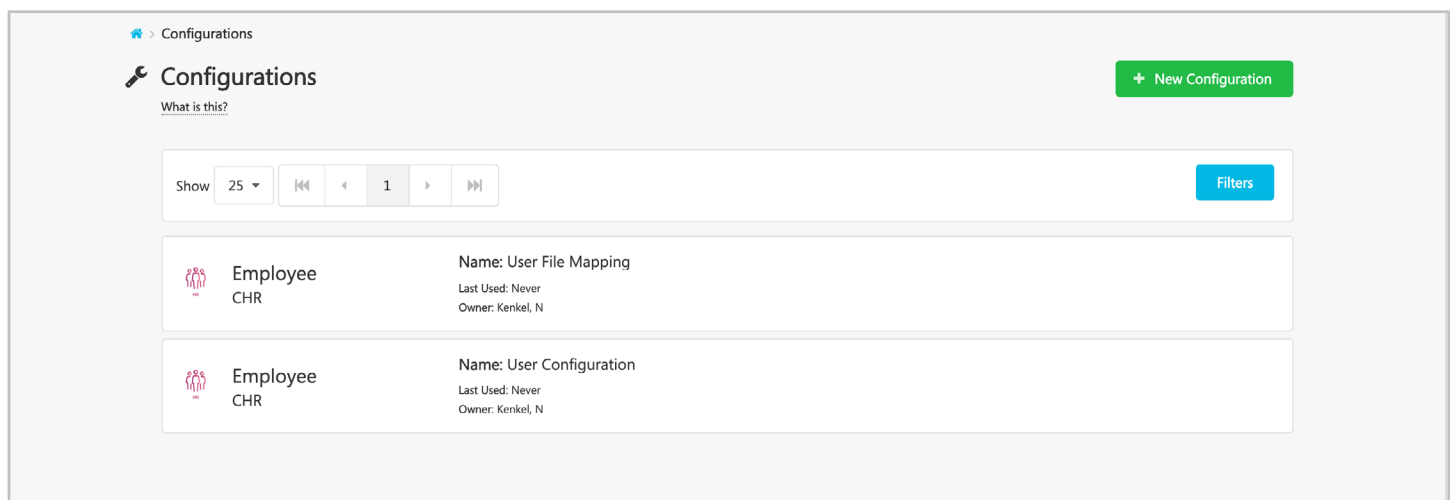
[See File and Data formatting chapters for common considerations.](#)

# Create Configurations (Step 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. At the top, there is a breadcrumb 'Configurations' and a green button labeled '+ New Configuration'. Below the header, there is a search bar with a magnifying glass icon and the text 'What is this?'. A pagination bar shows 'Show 25' with a dropdown arrow, followed by navigation icons (first, previous, 1, next, last) and a 'Filters' button. The main content area displays two configuration entries, each with a red icon of three people, the name 'Employee CHR', and details: 'Name: User File Mapping', 'Last Used: Never', and 'Owner: Kenkel, N'.

Icon	Name	Last Used	Owner
	Employee CHR	Never	Kenkel, N
	Employee CHR	Never	Kenkel, N

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.

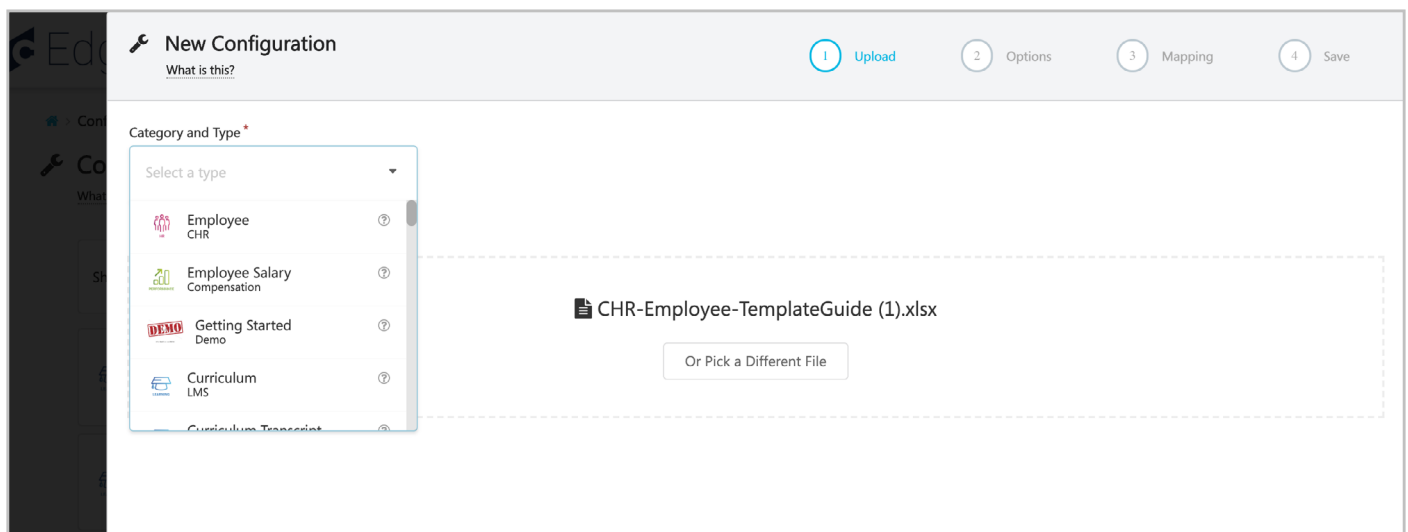
# Create a new configuration

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 data type for the configuration you're creating.



The screenshot shows the 'New Configuration' window with a progress bar at the top indicating four steps: 1. Upload (active), 2. Options, 3. Mapping, and 4. Save. On the left, a sidebar contains navigation icons. The main area features a 'Category and Type' dropdown menu with the following options: 'Employee CHR' (with a person icon), 'Employee Salary Compensation' (with a bar chart icon), 'Getting Started Demo' (with a 'DEMO' badge), and 'Curriculum LMS' (with a book icon). Below the dropdown, a file named 'CHR-Employee-TemplateGuide (1).xlsx' is displayed in the center of the workspace, with a button labeled 'Or Pick a Different File' underneath it.

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.

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.



For Employee loads, it is possible to Inactivate users not present in the file. By default, if more than 10% of users or OUs are to be inactivated by the file, the load will auto-cancel. This is a safety measure to ensure that incomplete or inaccurate loads will not cause unintended consequences. Contact Global Customer Support if you would prefer to adjust the threshold higher or lower than 10%.

You will need to answer several questions related to the selected data type. The responses to the presented questions will dictate how the system interprets and imports data records.

Both User and OU loads can be set to allow relationships with inactive users and OUs. If these options are not set to allow these inactive relationships, any User or OU that is associated with an inactive OU or User will receive a warning in the load results report and the associated field will result in a blank value.

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

### 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.

Status	Column Header	Map To Field	Description
⚠	Users ID	--no mapping--	
✅	Local System ID	--no mapping--	Specify the User Id from a third party vendor that needs to be maintained in Cornerstone
✅	Prefix	First Name*	Prefix
✅	First Names	Last Name*	
⚠	Middle Name	User ID*	
✅	Last Names	509963	
✅	Suffix	AC Custom Field	Middle Name

**Unmatched Fields**  
First Name\*  
Last Name\*  
User ID\*

- 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.

### 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.

Save this configuration

Enter a name for this configuration.\*

User Configuration

Save




## Recently Used Configurations (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.

Recently Used Configurations		<input type="checkbox"/> Show only mine
 Test Trans... LMS	Name: Test-Transcript-S1 Last Used: 7 Jan 2020, 04:16:10 EST Owner: Admin, Cornerstone	
 Test LMS	Name: Case 00873307 Last Used: 31 Dec 2019, 16:53:51 EST Owner: Singh, Prem Kanwal	
 Provider LMS	Name: Provider-S1 Last Used: 20 Dec 2019, 04:35:04 EST Owner: Admin, Cornerstone	


## Configurations Details (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.

 User Configuration + New Load

[What is this?](#)

OverviewOptionsMapping

Category and Type

 Employee  
CHR

Date Last Used

- Load: Never
- Feed: Never


Feeds that Use this Configurations (0)

This configuration is not used in any feeds

# Delete Configurations

To delete an Edge Import Configuration:

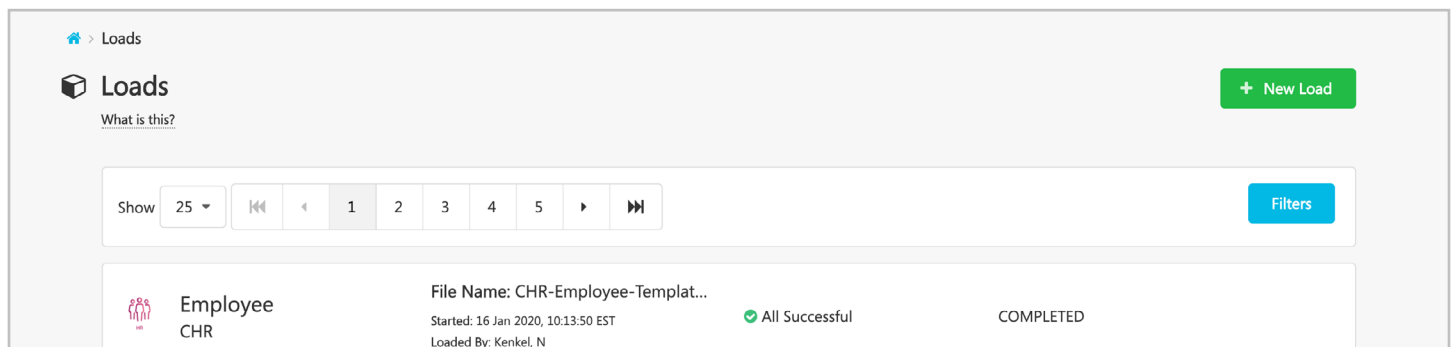
1. Select the Configurations option on the left-hand side of the page
2. Select the Configuration to be deleted
3. Open the Overview tab
4. Click on “Delete the configuration” button

Category and Type	
	Employee CHR
Date Last Used	
<ul style="list-style-type: none"><li>• Load: Never</li><li>• Feed: Never</li></ul>	
Feeds that Use this Configurations (0)	
This configuration is not used in any feeds	
Delete this configurations	
<div> Delete this configuration</div>	



# Creating Loads (Step 3)

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

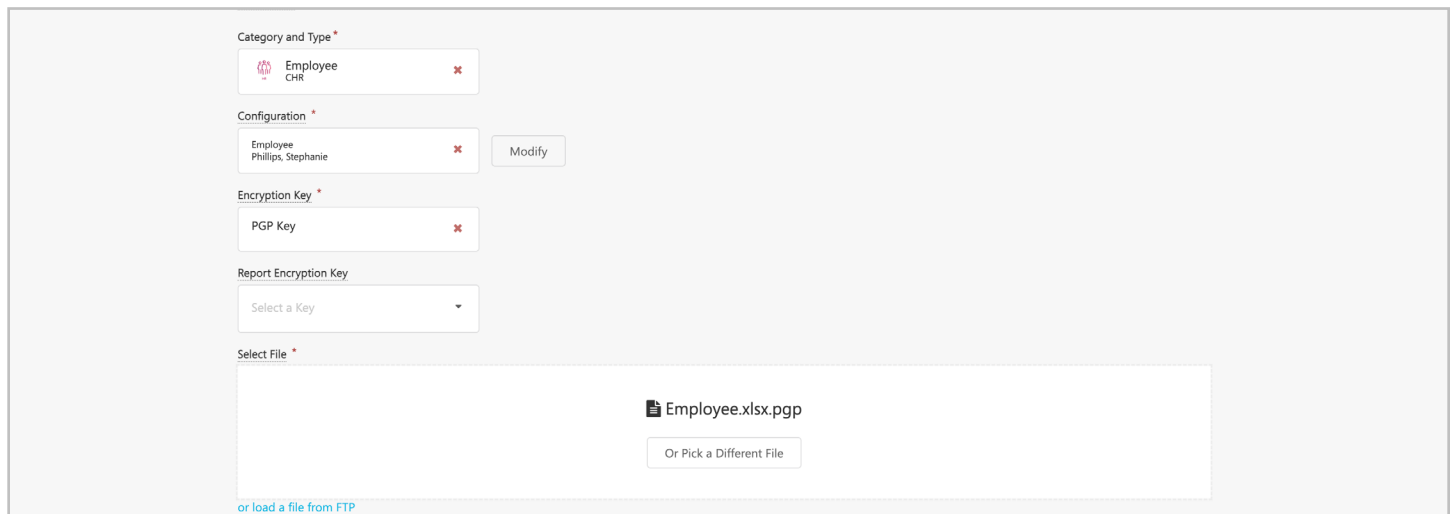


The Loads page lists the loads created by your organization. Selecting a load allows you to observe the Load Details page for information related to the configuration used and the success status of the load.

## Create a new load

To create a new load:

- Select the **New Load** button.



- 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.
  - These modifications will not save to the Configuration.
- Edge Import does not support updating an existing load configuration. If you need to modify an existing configuration, you will need to create a new configuration in Edge Import.

**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.**

If your file ends with a .pgp encryption, the **Encryption Key** and **Report Encryption Key** fields become available for selection.

The **Encryption Key** you select is the key for the encryption that your file has been encrypted with.

If you wish to generate encrypted reports then the **Report Encryption Key** must be selected from the dropdown.

PGP keys are generated in the [Key Management](#) page, select the matching **keys**. 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.



Note: The file type, sheet name, and header names for columns in your file need to match those mapped in the Configuration.

[See file and data formatting chapters for common considerations.](#)

## 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.

**Files placed on FTP for a one-time load will remain on the FTP after the load has finished processing.**

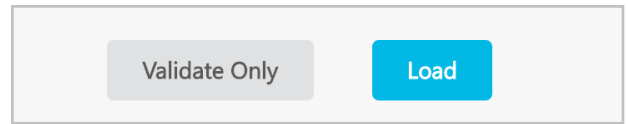
The screenshot shows a web form with a label "FTP File Path" followed by a red asterisk. Below the label is a text input field. To the right of the input field is a button labeled "Check File". Below the input field, the text "or upload a file" is displayed in blue.

## 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.



## 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.

Recent Loads


☐ Show only mine

Online C...  
LMS


File Name: LMS-Online Cou...  
Started: 7 Jan 2020, 20:33:20 EST  
Loaded By: cao, chris

 All Successful


COMPLETED

Test Trans...  
LMS


File Name: LMS-Test Transcr...  
Started: 7 Jan 2020, 04:16:10 EST  
Loaded By: Admin, Cornerstone

 All Successful

COMPLETED

Test Trans...  
LMS

File Name: LMS-Test Transcr...  
Started: 7 Jan 2020, 04:09:32 EST  
Loaded By: Admin, Cornerstone

 All Successful

COMPLETED

## 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.

The area to the right of the Information and Quick Stats and Reports sections 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.

[Home](#) > [Loads](#) > Load Details

### Load Details

What is this?

Information	
Category	LMS
Type	Provider
File Name	<a href="#">User TemplateGuide.xlsx</a>
Configuration	<a href="#">View</a>
Loaded By	Kenkel, N
Started	15 Jan 2020, 11:17:49 EST
Completed	15 Jan 2020, 11:17:54 EST

Quick Stats and Reports	Download
Loaded	6 <a href="#">Download</a>
Successful	6 <a href="#">Download</a>
With Warnings	0
Not Loaded	0
Total	6 <a href="#">Download</a>

### Overall Progress (100%)

Record Details

● Successful ● With Warnings ● Not Loaded ● In Progress

By selecting the **file name** link, users can download the original file that was uploaded to create this load.

Reports will expire and become unavailable for download after 30 days post load (this limit can be increased to 90 days with a request to Global Customer Success).

Started

Jun 16, 2023 12:39 PM PDT

Cancel Load

Cancel

A **Cancel** button displays on the load details page only if there are records available to be cancelled and the load process has not yet completed. The number of records that were cancelled appears in the Error Details section. The Information section of the load details

page indicates who cancelled the load and displays the date and time the load was cancelled.



### Report view permissions

Users with access to Edge Import can see the high level load results for all loads even without having permissions to perform loads for those load types.

Users with permissions for a particular load type can download detailed **result reports** and the **file originally uploaded** for loads created by anyone in your organization.

An optional permission is available that can limit the reports a user may download to only loads created themselves. See the [Restrict Download Reports](#) section of Getting Started for more details.

# Schedule Feeds (Step 4)

You can create data feeds that import one or more files on a scheduled basis. Feeds can ensure your Cornerstone portal has the most up-to-date data. These files are typically generated by an HRIS or third-party vendor and placed on your Cornerstone-provided FTP.

## Feed Settings

With Edge Import you can create an unlimited number of scheduled feeds. To create a recurring data feed, select Feed Settings from the Edge Import Homepage.

The screenshot shows the 'Feed Settings' page. At the top, there is a breadcrumb 'Feed Settings' and a green '+ Create Feed' button. Below the header, there is a 'What is this?' link. A pagination bar shows 'Show 25' and navigation controls. The main content area lists three feeds:

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

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.

The screenshot displays the 'qa01-techwriter Feed 10' settings page. At the top, there's a breadcrumb trail: 'Feed Settings > qa01-techwriter Feed 10'. Below this, the feed name 'qa01-techwriter Feed 10' is shown with a pencil icon for editing and two warning icons indicating 'No active files' and 'No schedule'. A 'What is this?' link is also present. A tabbed interface shows 'Overview' as the active tab, with other tabs for 'File Setup', 'Scheduling', 'Notifications', 'Encryption', and 'Change Log'. The 'Overview' section includes: 'FTP Location' with the path '\\LAX-QA-FS111\FTP\clients\qa01-techwriter\EdgeImport\Feed10' and a 'Change FTP Path' link; 'Files' with a 'No active files' warning and an '+ Add File' button; 'Schedule' with a 'No schedule' warning and a 'Set Schedule' button; 'Encryption' with a 'No Encryption Key' warning and a '+ Select Key' button; 'Notifications' with a 'No Notifications' warning and an '+ Add Notification' button. At the bottom, 'Last Run' shows 'This feed has never run.', 'Next Run' shows 'Not Applicable. Schedule not saved.', and 'Status' shows 'Disabled. The feed cannot be enabled at this time. Please check warning messages.'

## 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 find 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.

The **Delete this Feed** button at the bottom of the page allows you to remove the feed from the Feed Settings page.

## 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.

Add file to feed "caretest Feed 10"

File Options

Category and Type \*

Employee CHR

Configuration

User File Mapping Kenkel, N

File Name Starts With

Users

Include in feed

Include this file in the feed

☒ Yes ☐ No

\* This field is required

Cancel Add File

From the **Category and Type** dropdown select the data type you will be uploading. The **Configuration** dropdown lists all configurations built by your organization for the selected 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, Users.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, Users

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.

Multiple files can be added to a feed, allowing your Employee and OU files to all 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.

FTP Location

ftp.caretest.csod.com/EdgeImport/Feed10

Run Feed Check Files

### 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 delivery your data files to the Cornerstone-provided FTP at a recurring schedule. This allows you to align the timing between your various products.

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

Edge

Feed

car

What

O

N

A

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

- **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.

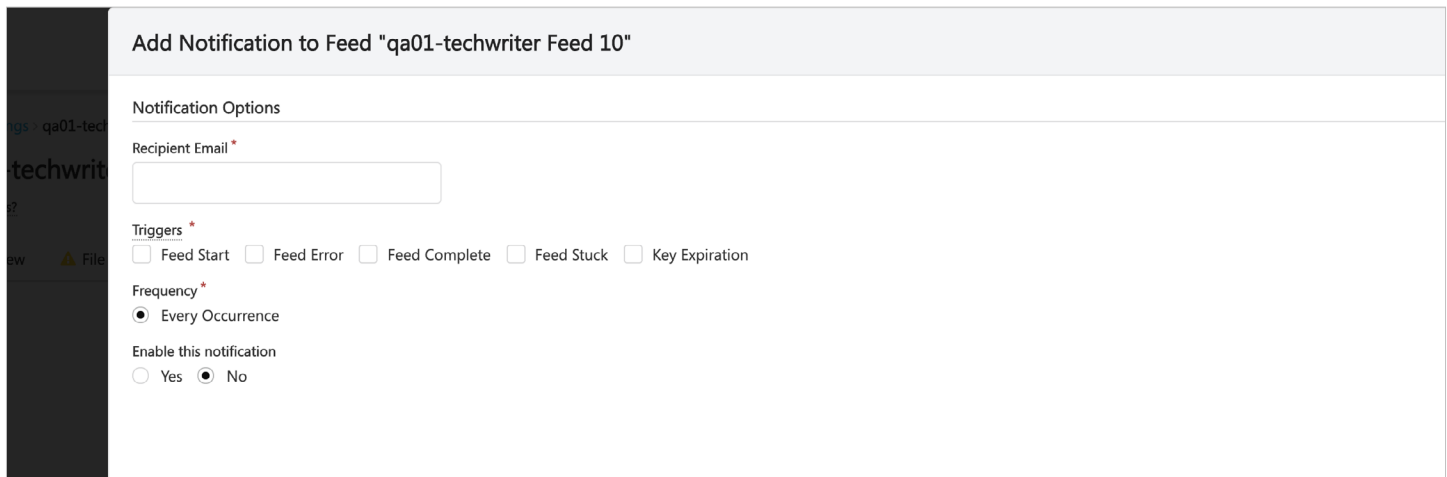


Keep in mind that there may be a delay between when your HRIS begins delivering files to the FTP and when those files have finished uploading and are ready for Edge Import to process.



## 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.



The screenshot shows a 'Notification Options' flyout for a feed named 'qa01-techwriter Feed 10'. The form includes a 'Recipient Email' field, a 'Triggers' section with checkboxes for 'Feed Start', 'Feed Error', 'Feed Complete', 'Feed Stuck', and 'Key Expiration', a 'Frequency' section with a radio button for 'Every Occurrence', and an 'Enable this notification' section with radio buttons for 'Yes' and 'No'.

Add Notification to Feed "qa01-techwriter Feed 10"

Notification Options

Recipient Email \*

Triggers \*

☐ Feed Start ☐ Feed Error ☐ Feed Complete ☐ Feed Stuck ☐ Key Expiration

Frequency \*

☒ Every Occurrence

Enable this notification

☐ Yes ☒ No

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 of the latest scheduled data load and a link to Edge Import for more details.

## Encryption

If your files will be encrypted with a PGP select the matching **Encryption Key**.  
If your feed reports should be encrypted, select the **Report Encryption Key**.  
Keys are loaded and generated in the [Key Management](#) page.

Encryption Key

If feed has any files with .pgp extension, below key will be used to encrypt data.

PGP Key

Expiry Date: Apr 14, 2024  
Owner: Flanagan, Roy

Download PGP Key

+ Change Key

Report Encryption Key

No Encryption Key

The feed is not configured to use any Report Encryption Key.

+ Select Key

## 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.

## 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.

Show

25

⏮

⏪

1

⏩

⏭

Filters

🕒

Schedule Set

16 Jan 2020, 08:48:12 EST

Kenkel, N

[schedule set]

→

The feed is scheduled to run every day at 00:00 (UTC-05:00) Eastern Time (US & Canada)

📁

File Added

16 Jan 2020, 08:17:48 EST

Kenkel, N

[file added]

→

Type: Employee  
File Name: Users  
Included in feed: true  
Configuration Name: User File Mapping  
Configuration Owner: Kenkel, N

🔑

Feed Created

16 Jan 2020, 08:02:48 EST

Kenkel, N



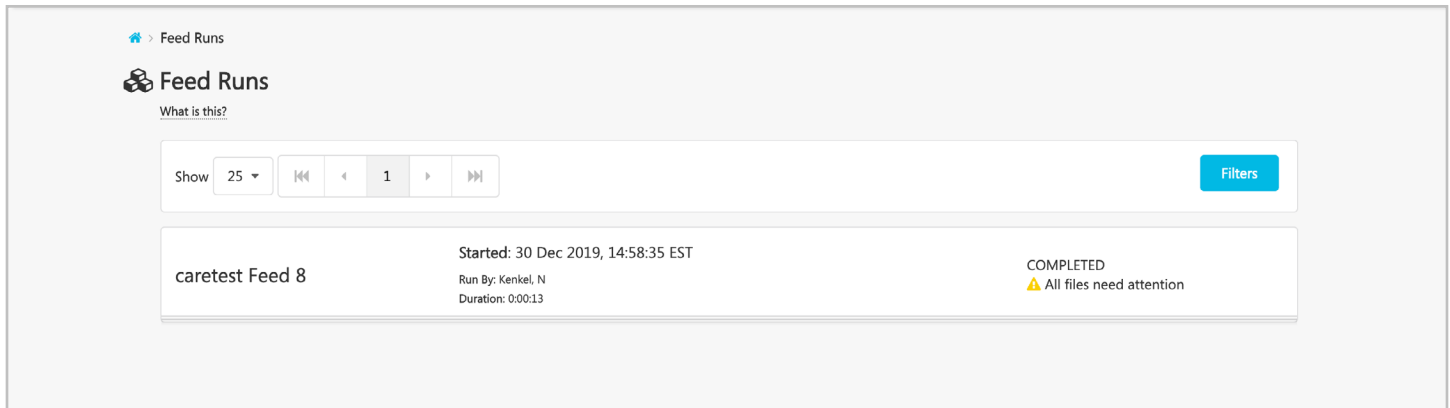
### What happened to my file after processing?

After a data feed is executed, the files for that feed are automatically removed from the FTP source. This will only affect the files associated with this feed.

# 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.

## 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:

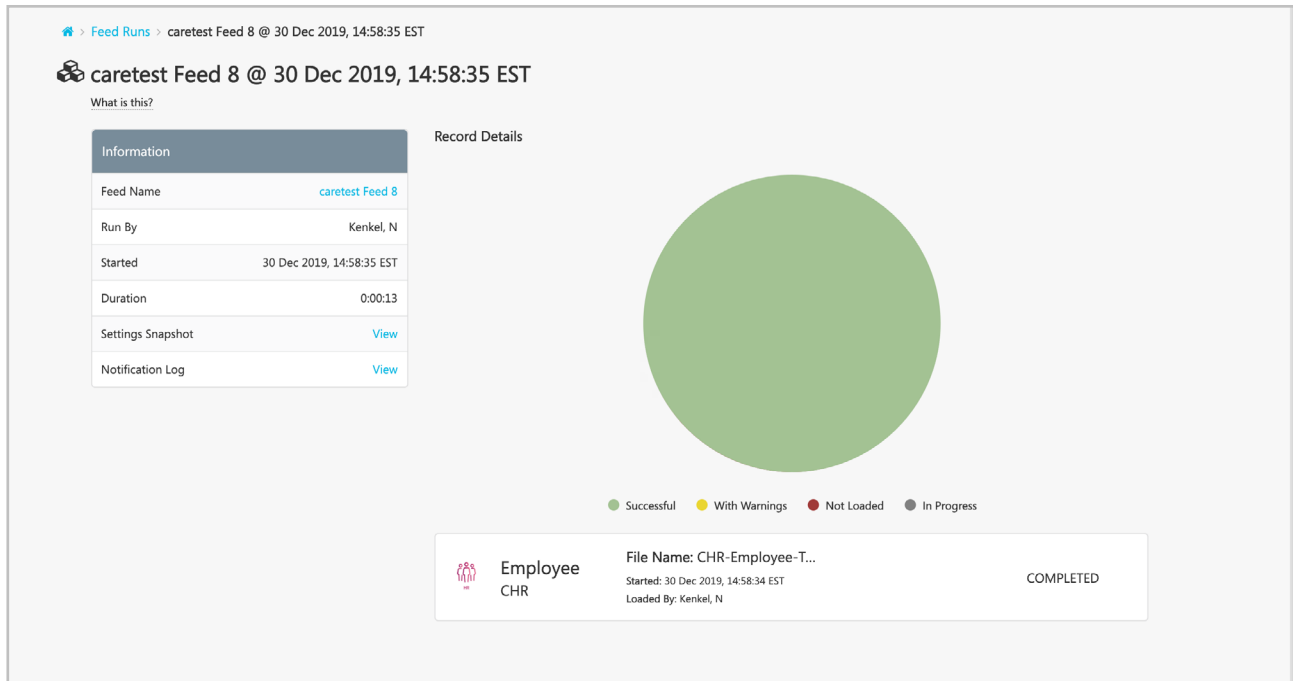
- The name of the feed
- The date and time the feed began processing
- Who initiated the feed run, either an individual user or by schedule
- How long the feed took to process
- The status of the load.

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

# Feed Runs 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.

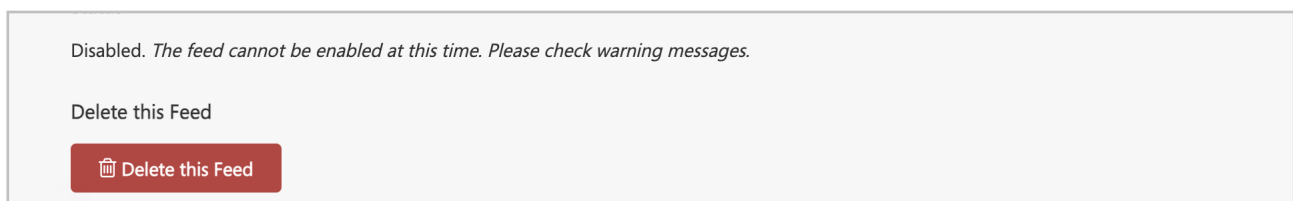


Selecting the file name below the pie chart will direct you to the [Load Details](#) for that file load.

## Delete Feeds

The **DELETE THIS FEED** button is available on the Overview tab of the feed settings.

- This button is only available to administrators with the “Delete Feeds” permission.
- Only disabled feeds can be deleted.
- A deleted data feed cannot be restored.



# File formatting

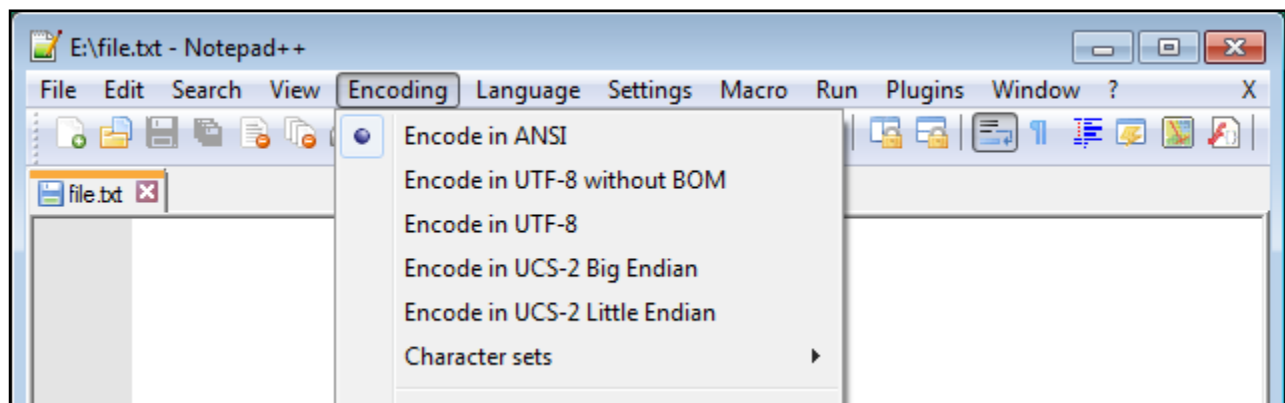
## File types

Edge Import supports the uploading of two file types: **Text** and **Excel**. The names you give to your files are flexible. The names of the columns within your file must be unique for that file (i.e. only one column per file may be named User ID).

Once a configuration has been created using a particular file type (including delimiter, encoding, or worksheet name), identical formatting will need to be used for any data load or scheduled feed using that configuration.

### Text files

- Supported file extension: .CSV or .TXT
- Supported delimiter: TAB, COMMA or PIPE
- Supported encoding: ANSI, UTF 8, UTF 8 BOM



- \* When using accented or umlaut characters in data feeds, files should be UTF-8 encoded with BOM (Byte Order Mark) to ensure the characters display properly in the system.

### Excel files

- File extension: .XLS or .XLSX
- Only one worksheet can be loaded at a time

## Encrypted files

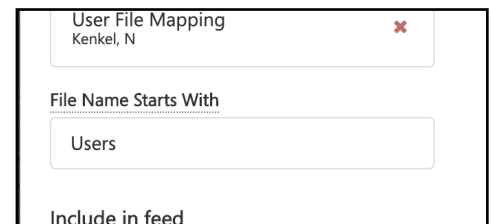
The Edge Import [Key Management](#) page allows for the generation of PGP keys that can be associated with your configuration files for scheduled feeds and one-time data loads.

When uploading a PGP encrypted file, ensure file name extension also has .pgp or .gpg.

## File Name

To prevent errors regarding the file name being ambiguous (there are multiple file with the same name present in the directory), please consider the following when creating the file name :

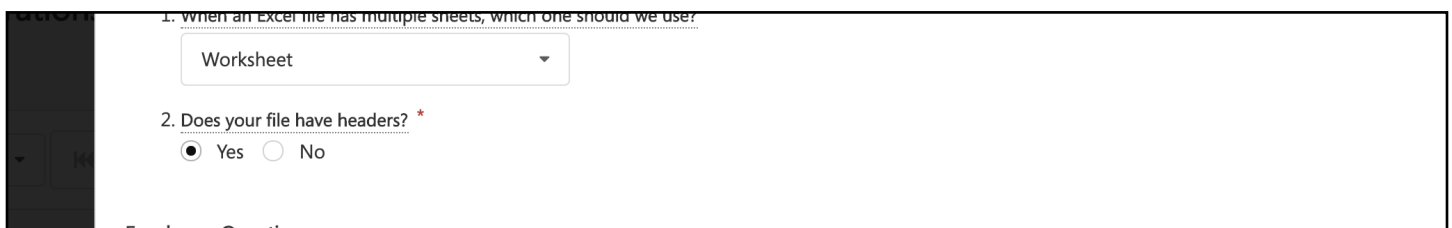
- The “File Name Starts With” can be either static or dynamic.
- If the file name is static, enter the full file name (i.e. “salary.txt”) ( Below image ).
- If the file name is dynamic, enter the prefix for the file.
  - For example, if the file is named like salary\_{date}.txt, then only enter “salary”.



Feed is configured to accept Dynamic File Name. So this option would only have “prefix” for the file.

## Headers

Edge Import supports Text and Excel files with and without column headers. During creation of a new configuration, you will be asked **Does your file have headers?**



If you select **Yes**, Edge Import will recognize the first row in your file as the column names to be used when mapping.

If you select **No**, Edge Import will recognize the first row in your file as data. Mapping will display the column names as Column1, Column2, Column3, ...

The screenshot shows the 'New Configuration' interface. At the top, there are four steps: 'Upload', 'Options', 'Mapping' (active), and 'Save'. Below the steps, there are two dropdown menus: 'Show All Column Headers' and 'Show Required Unmatched'. The main area contains a table with four columns: 'Status', 'Column Header', 'Map To Field', and 'Description'. The table has three rows, each with a yellow warning icon in the 'Status' column, 'Column1', 'Column2', and 'Column3' in the 'Column Header' column, '--no mapping--' in the 'Map To Field' column, and an empty 'Description' column. To the right of the table, there is a red box labeled 'Unmatched Fields' containing three input fields: 'First Name\*', 'Last Name\*', and 'User ID\*'. The 'User ID\*' field has a red asterisk indicating it is required.

Status	Column Header	Map To Field	Description
⚠	Column1	--no mapping--	
⚠	Column2	--no mapping--	
⚠	Column3	--no mapping--	

Unmatched Fields

First Name\*

Last Name\*

User ID\*

It is recommended you use column headers to make the configuration and maintenance process more user friendly and less vulnerable for errors.

## File limits

### File size

The maximum file size that can be used is 20 MB for files uploaded from the UI or any Excel file, and up to 1GB for csv/txt files uploaded through FTP. “FTP” includes feeds and one-time loads. As mentioned, files uploaded from the UI are limited to 20 MB. If you need to upload larger files, you can place them on the FTP. If you use Excel files, you are still limited to 20 MB and in which case you should be loading txt/csv files which have a 1 GB limit.

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.

### Number of columns in a file

Feeds and one-time loads use the same configurations, thus the maximum limit is 300 mapped columns in a file for either a feed or one-time load.

### Number of records in a file

The number of records you can load varies by environment and load type. The attached file lists the current limits per environment for Edge Import.

Additional up to date limits per environment can be found in [Knowledge Central](#). These limits are also listed in the template guides for each load.

# Data formatting

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	False
1, active, on, t, true, y, yes	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	
		Mini
Date/Time value indicating when it was completed. Required if transcript status is Completed (not registered, etc).		A val

### 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

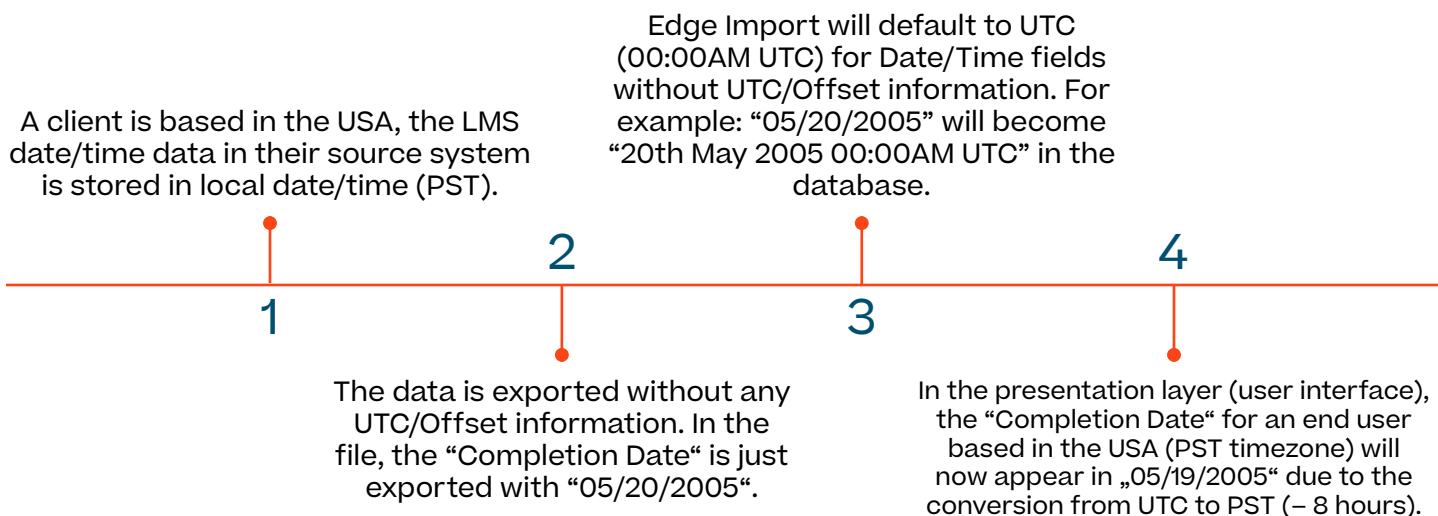
Date/Time in file contains a time stamp in UTC

Cornerstone Portal

Date/Time for a user record in Singapore (SGT) (in Source System)	Date/Time in 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 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)

## Date/Time Example 1 - UTC



To import and display PST data correctly, the data should be exported or transformed to value including an UTC/Offset information. For example (from PST to UTC): "05/20/2005" should become "05/20/2005 00:00:00 -8"

**when data in an invalid date format is present** in an Edge Import load the row at fault will not be imported. A new warning message is visible on the Load Details page and in the Excel error report for the load to indicate that data in an incorrect date format was present in the file.

## 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.



## 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.

**Tell us about your data**

1. Is translation load?

☐ Yes ☒ No

2. What culture should be used as a default?

English (US) ▼

## 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.

## 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.

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 omitted, 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”.

### 2. What should we do with blank values?

☐ Apply default value ☒ Do Nothing

## Blank values

When blank/no data is provided in the file, Edge Import wants to know how should it interpret mapped optional field values:

- Choose “Apply Default Value”:
  - If for all mapped optional column having no data provided in the file, you want to update existing records with default values.
  - If the default value is “empty string” or “blank” or null, only those will be updated with blank else will be updated with specific default value as defined in the Template Guide - default value section.
- Choose “Do nothing”:
  - If for all mapped optional column with no values, you DO NOT want to update existing values in the system.

For records eligible for creation, the load will apply defaults for mapped or unmapped fields as necessary for creation of the records by system design.

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). For a custom field to appear in the template guide, your user account must be within the custom field’s availability.

- 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

Cornerstone University

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## 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 (\*).

# Appendix

## Data load types

For details on specific load types, please refer to the [Edge Import - Load and Feed Types in Online Help](#).

## Key Management

Key Management allows you to manage the **PGP (Pretty Good Privacy) Encryption keys** of your feeds and loads. PGP provides an added layer of security to protect your organization's information and can be used for one-time data loads and scheduled feeds. The Key Management page is divided into two tabs, **Encryption Keys** and **Report Encryption Keys**.

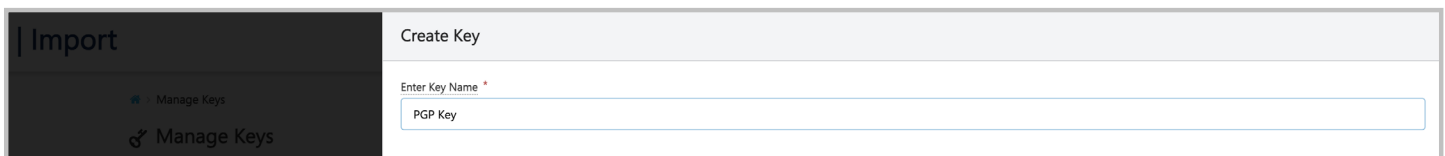
### Encryption Keys

The **Encryption Keys** tab allows you to generate a key to use when encrypting the files you'll be uploading.

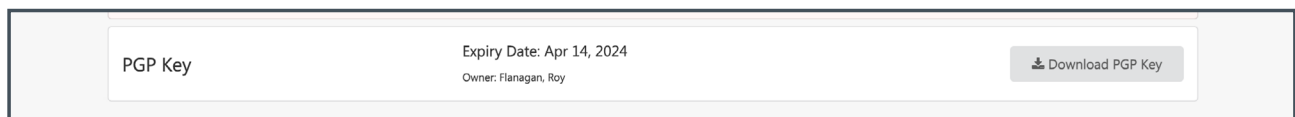


The screenshot shows the 'Encryption Keys' tab selected. At the top right is a green '+ Create Key' button. Below it is a search bar with a 'Show Only Active Keys' toggle and 'Reset' and 'Filters' buttons. At the bottom, there is a pagination bar showing 'Show 25' items and a page number '1'.

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 the 'Create Key' flyout. It has a sidebar with 'Import', 'Manage Keys', and 'Manage Keys' options. The main area has a 'Create Key' title and a form with 'Enter Key Name' and a text input field containing 'PGP Key'.



The screenshot shows a card for a 'PGP Key'. It displays 'Expiry Date: Apr 14, 2024' and 'Owner: Flanagan, Roy'. A 'Download PGP Key' button is located on the right side of the card.



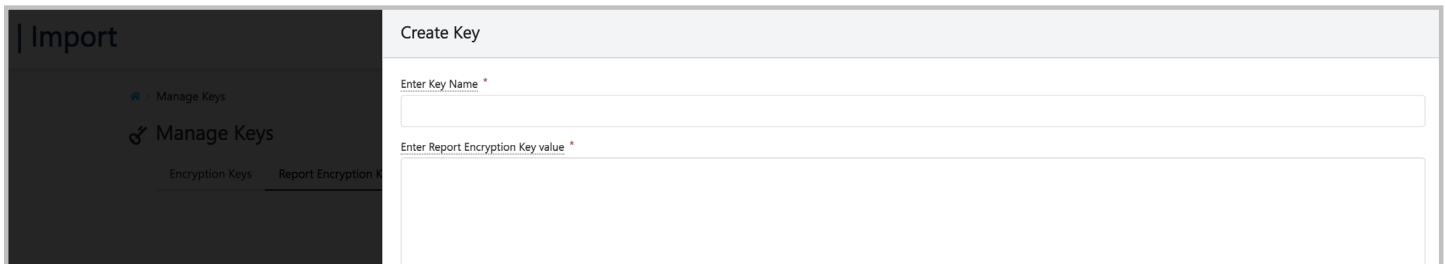
## Edge Import Key Management Highlights:

- 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.

## Report Encryption Keys

The **Report Encryption Keys** tab allows you to provide a key that you will use to decrypt your feed and load reports.

To begin, Select the **Create Key** button. Enter a **name** and the **key value**. Select the Create Key button

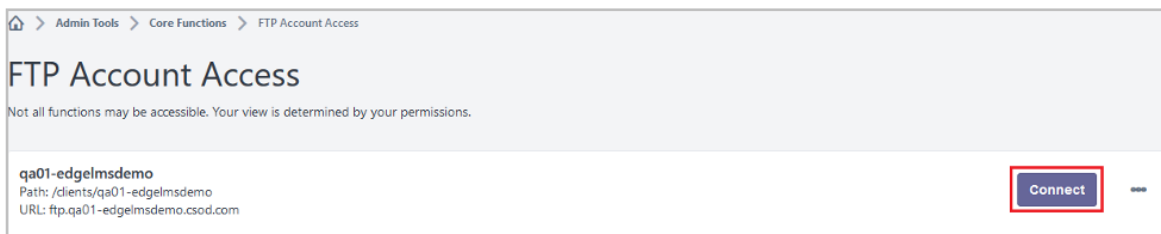


The screenshot shows the 'Create Key' form. On the left is a dark sidebar with 'Import' at the top, followed by 'Manage Keys' (with a sub-link 'Manage Keys'), and 'Encryption Keys' and 'Report Encryption Keys' at the bottom. The main area is titled 'Create Key' and contains two input fields: 'Enter Key Name \*' and 'Enter Report Encryption Key value \*'. A 'Connect' button is visible at the bottom right of the form.

## FTP access

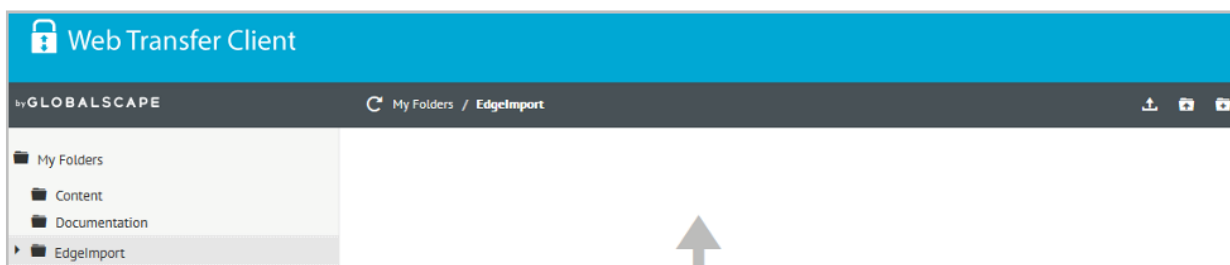
User's within the System Administrator security role will be able to access the FTP account by following the below steps:

1. Navigate to Admin > Tools > Core Functions > FTP Account Access
2. Click Connect.



The screenshot shows the 'FTP Account Access' page. The breadcrumb trail is 'Admin Tools > Core Functions > FTP Account Access'. The page title is 'FTP Account Access'. Below the title is a message: 'Not all functions may be accessible. Your view is determined by your permissions.' Below this is a table with one row containing the text 'qa01-edgelmsdemo', 'Path: /clients/qa01-edgelmsdemo', and 'URL: ftp.qa01-edgelmsdemo.csod.com'. To the right of the table is a 'Connect' button, which is highlighted with a red box.

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.



The screenshot shows the 'Web Transfer Client' interface. The title bar is blue with a lock icon and the text 'Web Transfer Client'. Below the title bar is a dark grey bar with 'by GLOBALSCAPE' on the left, 'My Folders / Edgelmsdemo' in the center, and three icons on the right. Below this is a sidebar with 'My Folders' and a list of folders: 'Content', 'Documentation', and 'Edgelmsdemo'. The main area is white and shows a large grey arrow pointing upwards.

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.

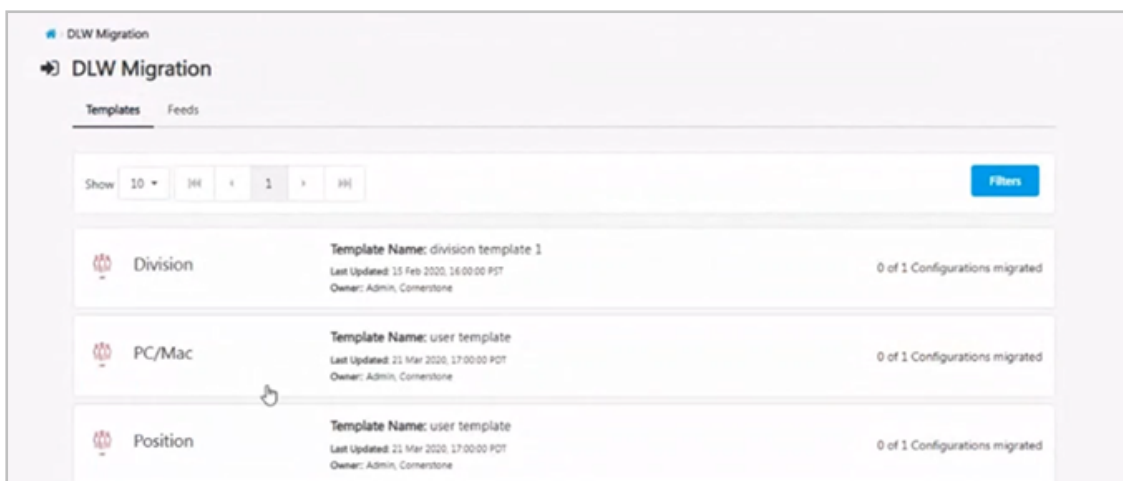
Review [Online Help](#) for more information about permissions and managing access to your Cornerstone-provided FTP directory.

## Considerations

- Two separate feeds can not process the same files in the same FTP folder.
- If you want to use the same files for a different feed, you will need to create a different FTP folder with those files.

## 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:

- DLW has been slated to be deprecated. Edge Import is the tool that should be used to load data into your Cornerstone portal by creating recurring feeds and one-time bulk loads, as long as the load has parity in Edge Import. Please reference this [Knowledge Article](#) on the latest information.
- 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.

## 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.

## Download Original File Uploaded

The original file uploaded is now available to be downloaded from the Load Details page. If the optional **Download Reports Access when portal opts-in for Restrict reports access - Edge Import** permission has been enabled in your portal (via a ticket to Global Customer Support) only users with this permission will have the ability to download the file.

## Frequently Asked Questions (FAQs)

Select this [link](#) to access Frequently Asked Questions related to Edge Import in the Knowledge Central.

# What's new with the November '23 release

## Support Customer PGP Key

This feature is targeted to customers who use Edge Import and upload PGP encrypted files. By allowing customers to add their own public PGP key, they now have the ability to decrypt the load reports.

Previously, reports for PGP encrypted files were only available to customers in a redacted format. By supporting a public key that customers specify to be used at the time they import a file to the Edge Import feed, customers can use their corresponding private key to decrypt the PGP encrypted load report.

The load report can only be decrypted by the customer's private key associated to that customer public key. Once decrypted, the user can then see records with errors, so they can readily resolve them.