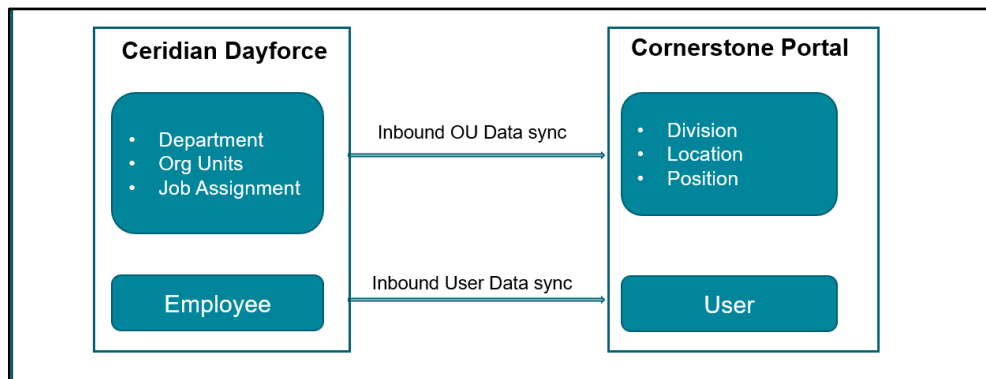


Ceridian Dayforce Inbound User OU Edge Integration Guide

Overview

The Ceridian Dayforce® Core Data Inbound Integration is an API-based solution to synchronize a client's user and organizational unit (OU) records in Cornerstone. This is a Uni-directional User OU integration to sync user and OU data from Ceridian Dayforce system to Cornerstone portals. The following functionalities are included with this integration:

- Unidirectional transfer of active OU and user data from Ceridian Dayforce to Cornerstone
- Nightly synchronization of OU and user data
- Ability to trigger the integration on-demand.
- Summary and log of synced OU and user data via email notification



Considerations:

1. The integration is only available to customers who have access to the Ceridian Dayforce Marketplace.
2. The integration runs nightly at a pre-defined schedule for both OU and User sync. The schedule cannot be modified. **See the Modes of Synchronization section for details.**
3. The following items are NOT supported:
 - a. OU custom fields
 - b. User custom fields
 - c. Legal Entity OU
 - d. Secure custom fields
 - e. Termination-related fields
 - f. Setting hierarchy for standard and custom OUs
4. Employees and future hires will always be part of the user sync.

Prerequisites

1. Cornerstone
 - Any Cornerstone product
 - The admin setting up the integration must have the permissions noted under Appendix A: Security Permissions.
2. Ceridian Dayforce® account
 - a. It is strongly recommended to test the integration in either your Cornerstone Pilot or Stage environment before setting it up in Production. Testing the integration in Pilot or Stage will synchronize the users and OUs from your Ceridian Dayforce “Test” environment to your Cornerstone Pilot or Stage environment.

Installation and setup

Setup Steps in Dayforce

Please contact your Ceridian Dayforce representative to set up the Integration on your Ceridian Dayforce Portal. Once the Integration is set up on your Ceridian Dayforce Portal, the “Company name”, “Username” and “Password” will be issued to you for use in setting up the Integration on your Cornerstone OnDemand Portal.

NOTE – Please bear in mind for each separate environment Integrated between Ceridian Dayforce and Cornerstone OnDemand Portal, separate “Username” and “Password” should be used to avoid Data Sync issues.

Setup Steps in Cornerstone

1. Log in to your Cornerstone portal.
2. Navigate to the Edge Marketplace (Admin Tools > Edge > Marketplace).
3. Search for Ceridian Dayforce Core Data Inbound Integration then click on the integration tile.
4. Click on Install.
5. Review the terms and conditions then select the checkbox for I have read, understand, and agree to the above terms and conditions. Click on Install.
6. Click on Configure Now. You will be directed to the Settings page.
7. Configure the integration on the Settings page.
8. **Notification Email:** An audit log is generated each time the integration runs which will be delivered to the specified email address(es). If entering multiple email addresses, separate each with a comma (.). The field is required to save the page.
 - a. Note the following:
 - i. The email sender will be integrationnotification@csod.com.
 - ii. You will receive an email notification when the sync completes.
 - iii. If syncing both users and OU data, you will receive a separate email notification for the user and OU sync.
9. **Company Name, Username and Password:** These will be issued by Ceridian Dayforce and are your organization’s unique credentials which Dayforce uses to authenticate requests originating from Cornerstone.
10. **User Identifier:** This relates to the User ID field on the Cornerstone User Profile page. The field is required to save the page.
11. **Sync Type:** This indicates what data type is included in each sync. The integration allows the option to sync both OUs & Users, OUs only, or user only. The default selection is “OUs & Users”. The field is required to save the page.
12. Sync Toggle Switches
 - a. Full Sync Now
 - i. To run a full sync on-demand, perform the following actions:
 1. Enter all required fields and configure the integration as desired.
 2. Turn on the Full Sync Now toggle switch.
 3. Click on the Save Settings button.
 - ii. This is an optional field.
 - iii. The toggle switch is turned off once the integration is triggered.
 - iv. Depending on the Sync Type selection, the sync will pull all active OUs and/or relevant users from Ceridian Dayforce.
 - v. OU and Users sync is always a full sync.
 - vi. NOTE: The integration can only run once (scheduled or on-demand) within a 1-hour period AND if no other sync (User or OU) is currently running.
13. **Standard Organizational Unit Mapping:** This table allows you to specify the mapping between the Cornerstone standard OU type and Ceridian Dayforce Organization Unit.
 - a. To add a standard OU mapping, perform the following actions:
 - i. Click on the **+ Add New Standard Organizational Unit Mapping**

- ii. Under Cornerstone Standard OU Type, select an OU type.
 - iii. Then, select its corresponding Ceridian Dayforce Organization Unit value.
 - iv. To delete an OU mapping, click on the trash icon.
- b. Note the following:
- i. The integration supports mapping a Cornerstone OU to any of the following Ceridian Dayforce Organization Units: Department, Org Units, and Job Assignments.
 - ii. At least one OU must be mapped when “Users & OU” or “OU Only” is selected in Sync Type.
 - iii. User record constraints that are implemented on the UI also apply to this integration. For example, if the Position OU is a required field on the User Profile page, then the Position OU must be mapped on the Settings page. If a user comes through the integration without a Position OU value, then the user will not be created/modified in Cornerstone.

Modes Of synchronization

Scheduled Sync

The integration is scheduled to run as follows:

- OU Sync: 3:00 AM (based on the local time of the data center your portal resides in)
- User Sync: 4:00 AM (based on the local time of the data center your portal resides in)

The nightly OU and User sync run on full sync.

On-demand Sync

The integration can be triggered on-demand from the Edge Settings page using the Sync Now toggle switches.

Full Sync Now

To run a full sync on-demand, turn on the Full Sync Now toggle switch then click on the Save Settings page.

The full sync will pull all OUs and /or users from Ceridian Dayforce.

Note the following:

- The toggle switch is turned off once the integration is triggered.
- The integration can only run once (scheduled or on-demand) within a 1-hour period AND if no other sync (user or OU) is currently running.

Integration Workflow

Before rolling out the integration within your organization, we recommend that you test the integration workflows.

OU Sync User

Step 1: Create/Update an Organization Unit in Ceridian Dayforce

The integration supports synchronizing standard OUs that are mapped to any of the following Ceridian Dayforce:

1. Department
2. Job Assignment
3. Org Units

Step 2: When the synchronization process is complete, the following will occur:

- A standard OU is created and/or updated in Cornerstone.
- The email address(es) defined on the Edge Settings page will receive an email notification with a summary and detailed log of OUs that have been processed successfully or failed.

See Appendix B: Email Notification & Log for an example of the email notification and log.

User Sync

Step 1: Create and/or update an employee record in Ceridian Dayforce:

Step 2: When the synchronization process is complete, the following will occur:

- New and/or updated user records are created and/or updated in Cornerstone
- Email address(es) defined on the Edge Settings page will receive an email notification with a summary and a detailed log of users that have been processed successfully or failed.

See Appendix B: Email Notification & Log for an example of the email notification and log.

Note the following:

1. Only active users in Ceridian Dayforce will be created/updated in Cornerstone. Changes to an inactive employee record in Ceridian Dayforce will not be reflected in Cornerstone. In this case, the record will be flagged as "Skipped" in the notification log.
 - a. Example: An inactive employee's email address is updated in Ceridian Dayforce. Since the change is to an inactive employee's record in Ceridian Dayforce, the integration will not update the inactive employee's email address in Cornerstone. This inactive user record will be flagged in the notification log as "Skipped".
2. If the user sync fails due to network issues, the integration will attempt to re-try unprocessed user records in the next successful sync (scheduled or on-demand). This does not apply to user records that failed due to validation errors (e.g. missing required field, missing OU, etc.). Any retried user will be included in the summary and log. **See Appendix B: Email Notification & Log for an example.**

The re-try logic will look at the past 7 days and sync all failed records (except validation errors). However, if a full sync runs within the past 7 days, the retry will only look at failed records from the last full sync.

OU Mapping

Following are the standard OUs that can be configured.

	Cornerstone Organization Unit	Ceridian Dayforce Organization Units
1	Location	Org Units
2	Position	Job Assignments
3	Division	Department

Division OU Field Mapping

	Cornerstone Field name	Ceridian Dayforce field name	Comment
1	Name	ShortName	Required field
2	ID	XRefCode	Required field
3	Active		Defaults to true

Location OU Field Mapping

	Cornerstone Field name	Ceridian Dayforce field name	Comment
1	Name	ShortName	Required field
2	ID	XRefCode	Required field
3	Active		Defaults to true

Position OU Field Mapping

	Cornerstone Field name	Ceridian Dayforce field name	Comment
1	Name	ShortName	Required field
2	ID	XRefCode	Required field
3	Active		Defaults to true

User Field Mapping

	Cornerstone User fields	Ceridian User fields	Comment
1	Active	Employment Status	"XRefCode" is Active in Employment Status Section
2	Username	Employee number	
3	User ID	Login ID	
4	First Name	First Name	
5	Last Name	Last Name	
6	Middle Name	Middle Name	
7	Email Address	Business Email	
8	Address line 1	Address 1	
9	Address line 2	Address 2	
10	City	City	
11	State	State	
12	Zip	Postal Code	
13	Country	Country	"XRefCode" for Country is loaded
14	Manager	Manager	
15	Location OU	Location OU node root XRefCode in Work Assignment expander	Configurable to the following in Dayforce: Org Units Job Assignments Department
16	Position OU	Position OU node root XRefCode in Work Assignment expander	
17	Division OU	Department OU noder root XRefCode in Work Assignment expander	
18	Original hire Date	Original Hire Date	
19	Last Hire date	Hire Date	

Appendix

Security Permissions

Permission Name	Permission Description	Category
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge
Edge Integrations - Manage	Grants access to the Integrations service for Edge Integrate where the administrator can configure, enable, and disable their third-party integrations that are used within the Cornerstone system. This permission cannot be constrained. This is an administrator permission.	Edge

Notification Email & Log

Notification Email:

Notification email when the user sync is complete.

Subject: Cornerstone/Ceridian User Integration Notification for qa01-ceridian_dayforce_p1 (Patch)

Hello,

Thank you for using the Ceridian Dayforce Core Data Inbound Integration. This email provides the status of the full user sync that ran on 01/18/2024 14:59:19 PM UTC.

Record Type	Added	Updated	Failed
Users	1122	1	32
Retried Users	0	0	0

Synchronization ID - 12e99c97-48f1-4b05-81dd-1dd4a8ad61cb

To report an issue with this integration, please submit a GCS case through Support Central and include the following details:

- 1.Preface the case subject with "Ceridian Dayforce Core"
- 2.Include the Synchronization ID

***** This is an automatically generated email. Please do NOT reply to this email as this address is not monitored.*****

- Added: this value indicates the number of user records added in your Cornerstone portal
- Updated: this value indicates the number of user records that have been updated in your Cornerstone portal
- Failed: this value indicates the number of user records that were not created, updated, or processed through the integration

Notification email when the OU sync is complete.

Subject: Cornerstone/Ceridian OU Integration Notification for qa01-ceridian_dayforce_p1 (Patch)

Hello,

Thank you for using the Ceridian Dayforce Core Data Inbound Integration. This email provides the status of the organizational unit (OU) sync that ran on 01/18/2024 14:04:09 PM UTC.

OU Type	Added	Updated	Failed
Division	70	0	0
Position	354	2	0
Location	630	0	0
Summary	1054	2	0

Synchronization ID - 46e2eacb-30f1-45db-8791-f531463e019a

To report an issue with this integration, please submit a GCS case through Support Central and include the following details:

- 1.Preface the case subject with "Ceridian Dayforce Core"
- 2.Include the Synchronization ID

***** This is an automatically generated email. Please do NOT reply to this email as this address is not monitored.*****

- Added: this value indicates the number of OU records added to your Cornerstone portal
- Updated: this value indicates the number of OU records that have been updated in your Cornerstone portal
- Failed: this value indicates the number of OU records that were not created, updated, or processed through the integration

Notification Log

User log

A	B	C	D	E
Ref	User Id	Name	Status	Message
3760	Jesse.Germany	Jesse Germany	Added	Success
3752	Earlene.Kenney	Earlene Kenney	Added	Success
3747	Steele.Ryans	Steele Ryans	Added	Success
166	Kristin.Anderson	Kristin Anderson	Added	Success

OU Log

Ref	Type	Status	Message
Administration	Division	Added	
Patient Care	Division	Added	
Facilities	Division	Added	
Facility Administration	Division	Added	
ASSEMBLY	Division	Added	
AUDITORS	Division	Added	
Back of House	Division	Added	

FAQs

Q: Can the scheduled run time be modified?

A: No. The integration run time is currently not configurable.

Q: I've copied the configurations from Pilot environment. Why does the Integration fail on production although it worked on Pilot environment?

A: Each environment is assigned its own unique "Username" and "Password". Please ensure to use the correct "Username" and "Password" values.

Q: How can I ensure that no duplicates are created in my Cornerstone portal?

A: The integration compares the User and OU ID for existing users and OUs in Cornerstone portal with "Xrefcode" ID in Ceridian Dayforce portal to update records in Cornerstone. This prevents any duplicate User records from being added.

Q: Does the integration support future terminations?

A: No, the integration currently does not support future termination.

