

API Interface with Cornerstone

Customer Guide

About API Interface

Using API interface, you can transfer existing employee data from your Cornerstone system into e-days. This guide will show you how to set up an API user in e-days and how to configure the system in preparation for Cornerstone interface.

Most of the employee details will be transferred from Cornerstone HR to e-days, however, some information will still have to be provided through the use of a Data Capture Form. Please see the table below for more information.

Information Type	API Compatible	Data Capture Form
First Name	✓	
Last Name	✓	
E-Mail Address	✓	
Last Hire Date	✓	
Active Status	✓	
User's Manager	✓	
Organisation Units (if configured)	✓	
SSO ID	✓	
User Template		✓
Hours Per Day		✓
Entitlement Time Unit (Hours/Days)		✓
Role		✓
FTE (Full-Time-Equivalent)		✓
Payroll Number		✓
Rota Patterns		✓
Employee Number		✓
Holiday Entitlement		✓
Date of Birth		✓

*Original Hire Date is not something which can over the interface currently.

Acquiring Necessary Prerequisites

Before you can configure your Cornerstone HR system, you will need to get the following information from your e-days system:

1. **Client ID**
2. **Client Secret**
3. **URL Address**

To get the **Client ID** and the **Secret**, you will need to log in using a Cornerstone Admin account that has been created for you by the e-days Onboarding Team. Once you are logged in, navigate to the **Admin Panel** by clicking the **Admin** link at the top of the page. Once in the **Admin Panel**, hover over the **Users** navigation tab and click on **Users**. Once you can see the list of all users, find a user account named **API User** and click **Edit** next to their name. Next, navigate to the **Roles** tab where you will find a button labelled

Generate Client ID and Client Secret.

Once you click on the **Generate Client ID and Client Secret** button, both values will be generated for your system. Make note of the **Client Secret** as it will not be available again once you leave this page.

You should now have two of the prerequisites:

1. **Client ID**
2. **Client Secret**

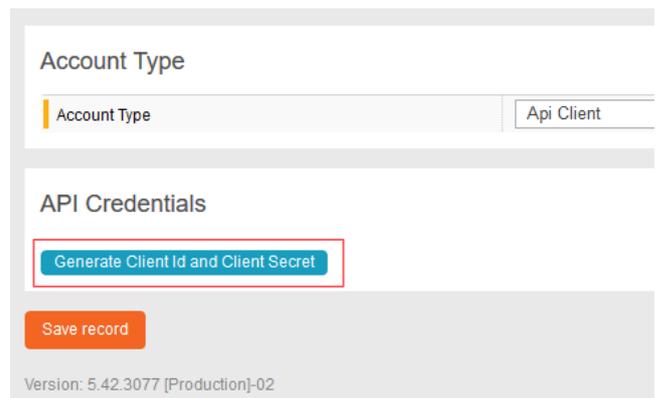


Figure 1 - Button Used to Generate Client ID and Secret

The last piece of information you need is the URL address of your edays system.
You can find the address of your system at the very top of your web browser.

Example: cornerstone.e-days.co.uk

Once you have all three pieces of information, you can move on to the next step.

Configuring Your Cornerstone HR System

To enable interface with edays, go to your Cornerstone HR system and navigate to the admin area and do the following:

- From the submenu, select **Tools**
- In the **Configuration Tools** screen, select **EDGE**
- In the **EDGE** screen, select **Marketplace** (this should open a new tab)
- From here, select **edays (Absence Management Interface)**
- In the e-days listing, select **Setup (this may read “Try for Free” if integrating with a Pilot/Staging environment)**

In the **Setup** screen, you will be asked to provide the following information:

- **Client ID:** This is the Client ID you have generated previously in your e-days system
- **Client Secret:** This is the Secret you have generated previously in your e-days system
- **e-days Portal URL:** This is the URL address of your e-days system
- **Organisational Units:** Select the OUs you would like to use in e-days as groups
- **Notification Email:** Enter the email address which should receive any error notifications
- **User Filter:** Filter can be setup to only allow certain users to come over the interface
- **e-days Assertion Consumer Service URL:** The URL will be provided to you when you setup SSO and are not wanting to use a Third IDP.
- **Third Party IdP:** Enable the toggle switch if you are using a third party federated IdP SSO provider. Note that enabling the toggle will disable the IdP SSO functionality that comes with this interface.
- **OU's/Custom OU's:** Allow for you to specify which OU structure you would like to add into edays, these will be used to set views for users.

After you complete the **Setup** form, click on the button at the bottom to save the configuration.

After you save the configuration, you will then have the ability to turn on API interface with your e-days system. You can also turn it off in the same area if you need to.

If you require assistance with configuring Cornerstone HR, please contact your Cornerstone representative.

You may also want to add the 'Absence Homepage' which you can use the above details to enable as well. The 'Absence Homepage' will allow for a section to appear in each user's record to show the entitlements and all the request which have been made and a link into the edays system.

Completing a profile for an API User

Now that the interface between Cornerstone and e-days has been set up, the user profiles will have transferred via the API from your Cornerstone system to your e-days system. As specified above, there are elements of the user profiles that are included in the API but there are other fields that need to be completed manually within edays.

Any user profiles that are included on the data capture form will be completed by your Implementation Specialist, but *you* will need to complete the user profiles of any new users added after go-live.

When users are transferred via the API, their profiles are allocated to a template called the “CSOD Default Template”. To view all users allocated to this template, navigate to the Admin Panel, select Templates and then click on the “Members” button for that template as shown below:

Description	Members	Copy	View	Delete
Administrator Template	2	Copy	Edit	
Argentina	54	Copy	Edit	
Armenia	62	Copy	Edit	
Bulgaria	69	Copy	Edit	
Canada	118	Copy	Edit	
CSOD Default Template	4774	Copy	Edit	

Once here, you can view the list of all incomplete profiles or search for a specific user profile that you want to complete and select “Edit”.

List of users Show entries

First name	Surname	Login	Payroll number	Employee number	Copy	View
Aaron	Sanchez	747			Copy	Edit
Aaryan	Mehra	647			Copy	Edit
Adam	Aaronson	752			Copy	Edit
Adam	Baumbach	1107			Copy	Edit
Addie	Admin	283			Copy	Edit

Below is a step-by-step guide of how to complete a user profile once it has been transferred via the Cornerstone API:

Profile

The first tab is the “Profile” tab, here you can update the following fields:

- Payroll number – this field is not mandatory so can be left blank
- Employee number – this field is not mandatory so can be left blank
- Date of birth – this field is not mandatory so can be left blank
- FTE – an FTE of 1 is automatically populated in this field but if the new user works part-time then amend the value accordingly

Personal details		
Partner Id	1234	
First name	Example	
Last name	User	
Email	Example@e-days.com	
Login	1234	
SSO ID	1234	
Payroll number		
Employee number		
Date of birth		
Employment start date	01/01/2019	
FTE	1	
Enable 'My data' page	<input type="checkbox"/>	

[Advanced >](#)

System

The next tab to the right is the “System” tab, here you can update the following fields:

- User Template
- Hours per day

User template	CSOD Default Template
Password settings	
Allow user(s) to change password	Inherited (No)
Force user(s) to change password	Inherited (No)
Format settings	
Time zone	Inherited ((UTC+01:00) Amsterdam, Berlin, Bern, ...)
Date format	Inherited (Day - Month - Year)
Date separator	Inherited (Slash (/))
Calendar year day	Inherited (1) Change calendar year
Calendar year month	Inherited (1)
Hours per day	Inherited (8:30 hours)

Roles

The next tab to the right is the “Roles” tab, here you can update the following field:

- Role

Select “Custom” and then select a role from the drop-down list provided:

Roles	Custom
<input type="text" value="Add role"/>	
Advanced >	

Rota

The next tab to the right is the “Rota” tab, here you can update the following field:

➤ Rota

Select “Apply rota” and then “Apply” a rota from the list of rotas available, following that you will be prompted to enter the start date of the rota for that user:

The screenshot shows the 'Rota' tab selected in a navigation bar. Below the navigation bar is the 'User calendar setup' section, which includes a refresh icon and the text 'Inherited from template ('CSOD Default Template') (08:30 Hours per day)'. An orange arrow points to the 'Apply rota' button. Other buttons include 'Apply public holidays', 'Apply custom days', and 'Apply calendar events'. Below this is the 'Current Rota' section, which is currently empty with the message 'No data available in table'. A search section follows with input fields for 'Name' and 'Description'. At the bottom is a table of rotas with columns for Name, Description, Recurrence, Start Date, and Action. The 'Action' column contains three 'Apply' buttons, which are highlighted with an orange box. The table also includes a 'Show 10 entries' dropdown and 'Previous' and 'Next' navigation links.

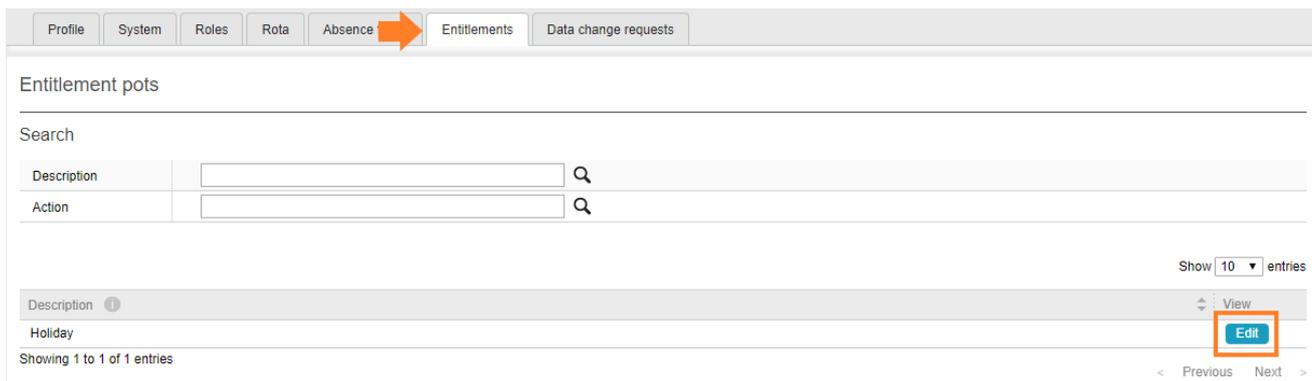
Name	Description	Recurrence	Start Date	Action
Mon/ Tue/ Wed/ Thu/ Fri		Every week on Monday,	01/01/2016	Apply
Mon/ Tue/ Wed/ Thu/ Fri/Sat/Sun		Every week on Monday,	01/01/2016	Apply
Sun/Mon/ Tue/ Wed/ Thu		Every week on Monday,	01/01/2016	Apply

Entitlement's tab

The next tab to the right is the "Rota" tab, here you can update the following field:

- Entitlements

Select "Edit" for the entitlement pot that you want to enter a value for:



You will now see your base entitlements for each employee based on their start date here or you will be able to enter a value for the current year manually:



The base entitlement will automatically given to an employee for Next Year or you can adjust this balance here:

