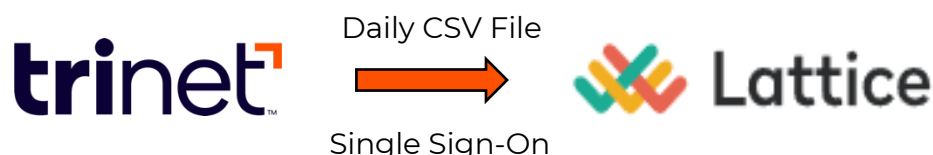# TriNet + Lattice Integration User Guide

Overview

The integration between TriNet and Lattice allows you to track your worksite employees' performance by automatically sending their information from TriNet to Lattice on a daily basis. Additionally, your employees can access Lattice directly from the TriNet platform using Single Sign-On.

Daily CSV File

The daily CSV file can be configured to send your employees' information from TriNet to Lattice. Basic employee information will be updated at Lattice as well as your org chart and reporting structure when this information is included.

These updates include:

1.   If your employee is "active" in TriNet but doesn't yet have an account in Lattice, we will create one for them.

2.   If your employee is "terminated" in TriNet but doesn't have an account in Lattice, we will not transfer any information for them.

3.   If your employee is "active" in TriNet and has an account in Lattice, we will update their information.

4.   If your employee is "terminated" in TriNet and has an account in Lattice, we will deactivate their account in Lattice and they will no longer be able to log in.

Once the daily CSV file import is completed, the newly created users in Lattice will remain in a "Created" state. They can be invited all at the same time or one at a time. Learn more here: How to Invite your Organization to Lattice.

Information included in a CSV File:

Field	Required	Comments
Email	Y	Employee work email
Name	Y	Employee first name and last name
Title	Y	Employee business title
Manager's Email	Y	Manager work email
Start Date	Y	Employee service date
Birthdate		Optional: A secondary template is available that includes employee birthdate.
Department	Y	Employee primary department
Phone Number	Y	Employee work phone number

Status	Y	Active or Terminated
Employee ID	Y	TriNet Employee ID

Single Sign-On
With the integration provided by TriNet you have the option to configure Single Sign-On between TriNet and Lattice. If configured, your employees will be able to launch Lattice directly from the TriNet platform to automatically log in.

In this scenario:

1. TriNet serves as an Identity Provider
2. Lattice serves as a Service Provider.

Section 1: Configure the Daily CSV File

Step 1: Initiate the SFTP Connection at Lattice

**Information you will need:**

☐	Lattice SFTP Username	Provide the Username for facilitating the SFTP flow. This is required to schedule the SFTP report in Reports & Analytics at TriNet.
☐	Lattice SFTP Password	This is required to schedule the SFTP report in Reports & Analytics at TriNet.

Lattice's Customer Experience team will initiate the connection to their SFTP server on the back end, and you'll receive an email like the screenshot below.

- In the email, click "Set your password".
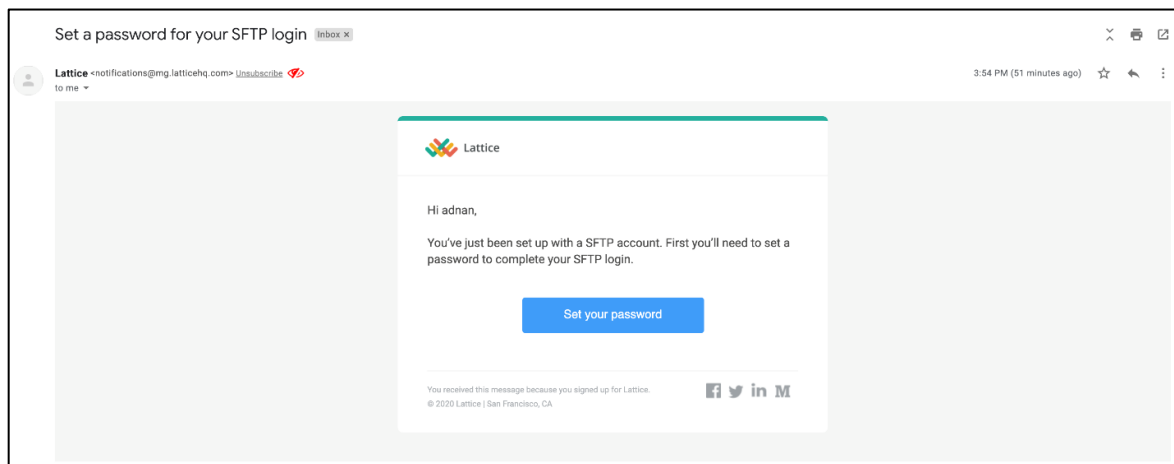
- You'll be redirected to the Integrations page in Lattice to create your SFTP password:
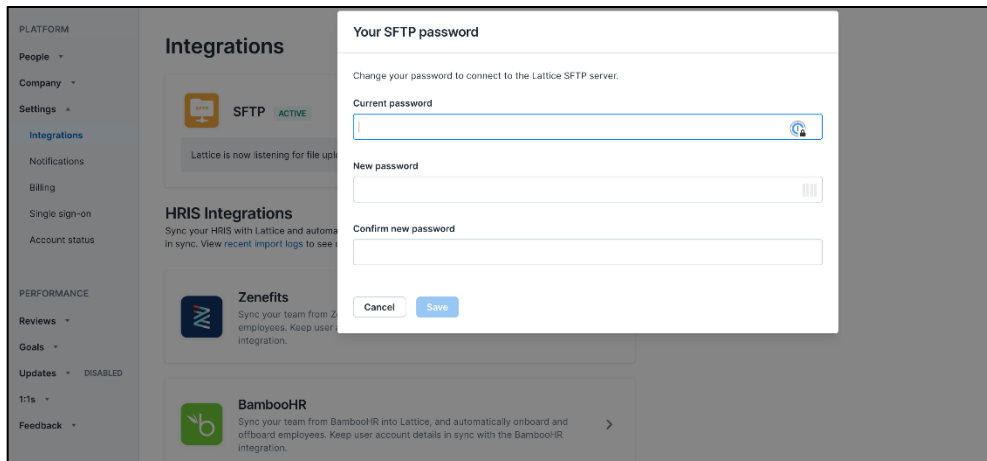
- Create your password, click "Save", and your SFTP connection with Lattice is complete.

Note: Upon connection, the SFTP sync will automatically set to Active.

Step 2: Schedule Your Employee Sync in TriNet

You'll need to configure an employee sync in the Integration Center to deliver employee information to Lattice.

To complete this step, you must have the Integration Administrator and Workforce Analytics Administrator roles.

- From the TriNet platform, go to **Marketplace.**
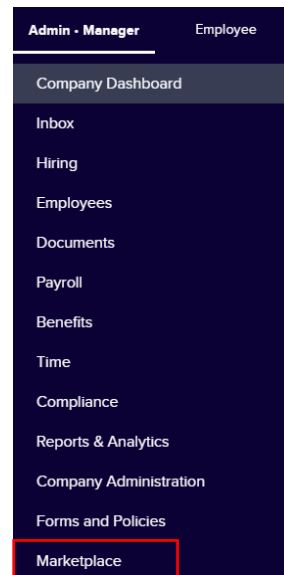
- Under **All Apps**, search for the **Lattice** card and click **View Details**.
- Click **Set up Integration.**

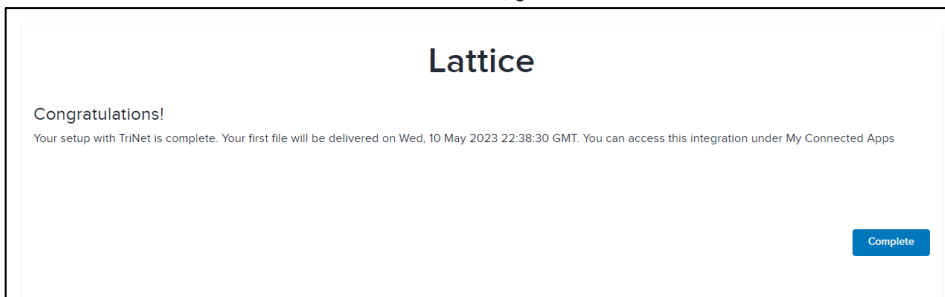- Enter your Username and Password for Lattice.

Lattice

Please enter the Lattice SFTP username and password and click Connect.

Username   trinetdevteam

Password   ●●●●●●●●●

Cancel   Connect

- ○ **Username**: Enter the username of the SFTP user established in Step 1(typically the same as company domain) For example, if your organization's Lattice URL is "https://bigco.latticehq.com", "bigco" would be your subdomain.
- ○ **Password**: Enter password created in Step 1.
- Click **Connect** to establish the integration. The system will perform a test connection at this time to ensure the credentials provided are valid.
- Once the connection is successful, you will receive a confirmation page:
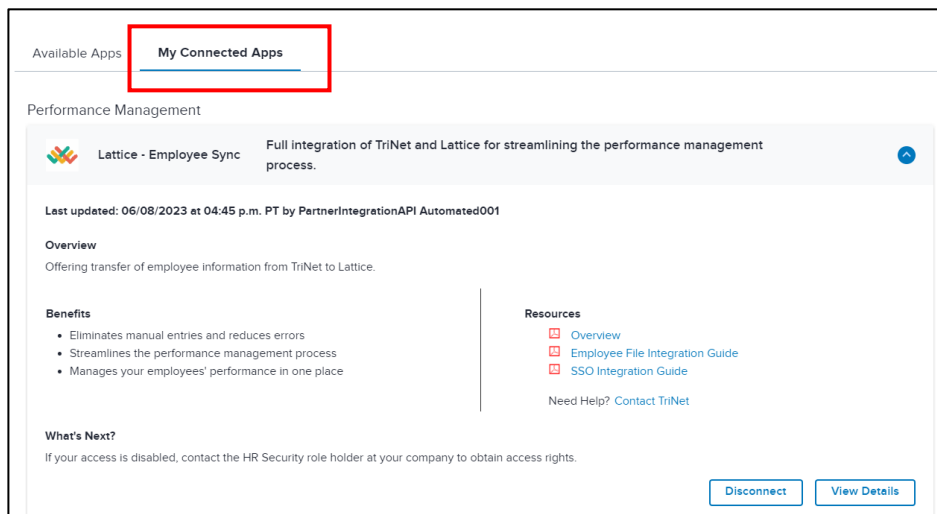
Lattice

Congratulations!

Your setup with TriNet is complete. Your first file will be delivered on Wed, 10 May 2023 22:38:30 GMT. You can access this integration under My Connected Apps

Complete

After completing your setup, the Lattice – Employee Sync will be moved to **My Connected Apps**:

Available Apps   **My Connected Apps**

Performance Management

Lattice - Employee Sync   Full integration of TriNet and Lattice for streamlining the performance management process.

Last updated: 06/08/2023 at 04:45 p.m. PT by PartnerIntegrationAPI Automated001

Overview
Offering transfer of employee information from TriNet to Lattice.

Benefits
- Eliminates manual entries and reduces errors
- Streamlines the performance management process
- Manages your employees' performance in one place

Resources
- Overview
- Employee File Integration Guide
- SSO Integration Guide

Need Help? Contact TriNet

What's Next?
If your access is disabled, contact the HR Security role holder at your company to obtain access rights.

Disconnect   View Details

You will be able to disconnect the integration, if necessary or view details from there.

Step 3: Monitoring

After configuring SFTP, you'll have access to some settings on the Integrations page in Lattice.
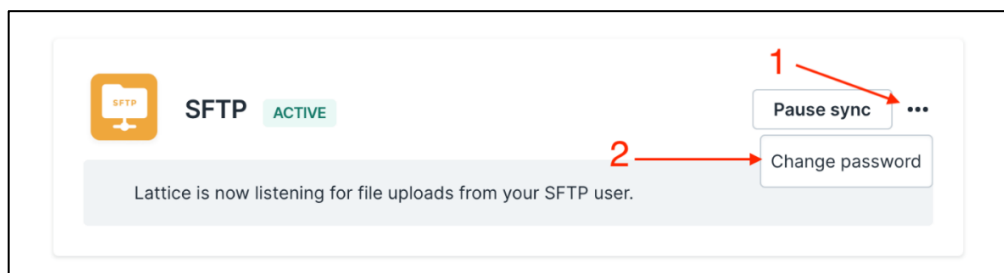
In Lattice, navigate to the **Admin section > Settings (on the left) > Integrations (below Settings)**
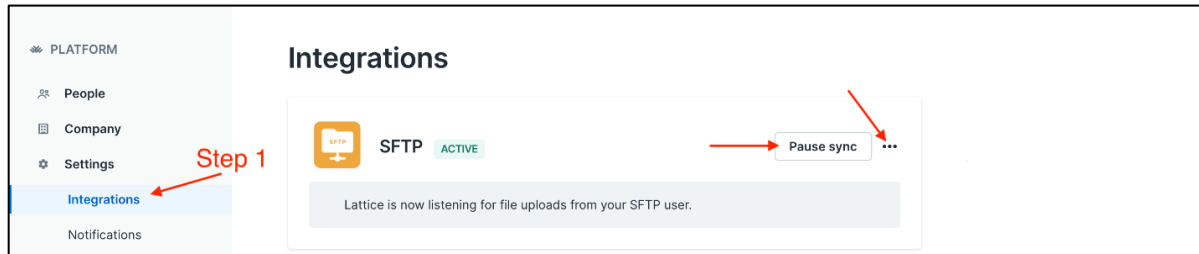
You can use the "**Pause sync**" button to stop SFTP file uploads and prevent any future automated changes to your user data. After pausing your sync, the button will change to allow you to "**Resume sync**" whenever you'd like SFTP to start updating your user data again.

Click "..." if you need to update your SFTP password.

Import Log

To confirm your SFTP file sync was successful in Lattice, check the import log by following the steps below:

1. In Lattice, navigate to the **Admin** section on the Discovery Navigation to the left.
2. Click **People** on the left side, and then click **Import Log**.

In the **Import Log** you can view what information synced successfully, and if there were any errors. You can view what occurred within Lattice by looking at the "**Description**" column.

There are three statuses in the Import Log:

The green check mark indicates that your SFTP synced successfully with Lattice.

The orange exclamation point indicates that the SFTP sync was successful (the CSV reached TriNet's SFTP server), but that there were issues updating some user data that need a closer look.

The red "X" indicates that the SFTP sync failed (your CSV was unable to reach TriNet's server) and no changes were made in Lattice.

If you want to view each status in more detail, click directly into the event that you would like to view.

This screen provides a high-level overview of successful updates or failed attempts to update within your SFTP sync.

Useful Links:
https://help.lattice.com/hc/en-us/articles/1500000931782-Keeping-Your-Org-Up-To-Date-With-SFTP

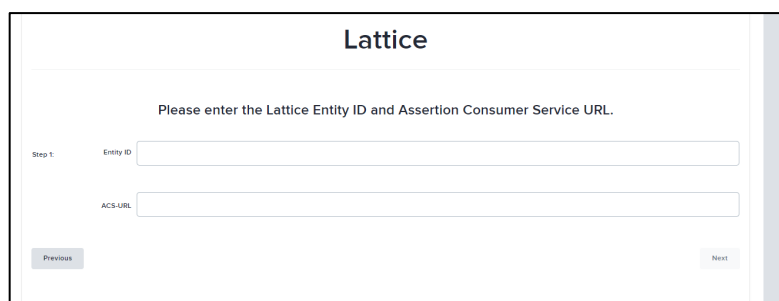https://help.lattice.com/hc/en-us/articles/360059507114-Importing-Your-Company-Org-via-CSV

Section 2: Set up SSO to Lattice

Step 1: Configure SSO in TriNet

- Click on **TriNet Marketplace** in the navigation menu.

- Under **All Apps**, search for the **Lattice** card and click **View Details**.
- Click **Set up SSO**.

- Provide the following information:
Entity Id: https://router.latticehq.com/sso/[subdomain]/metadata

ACS URL:
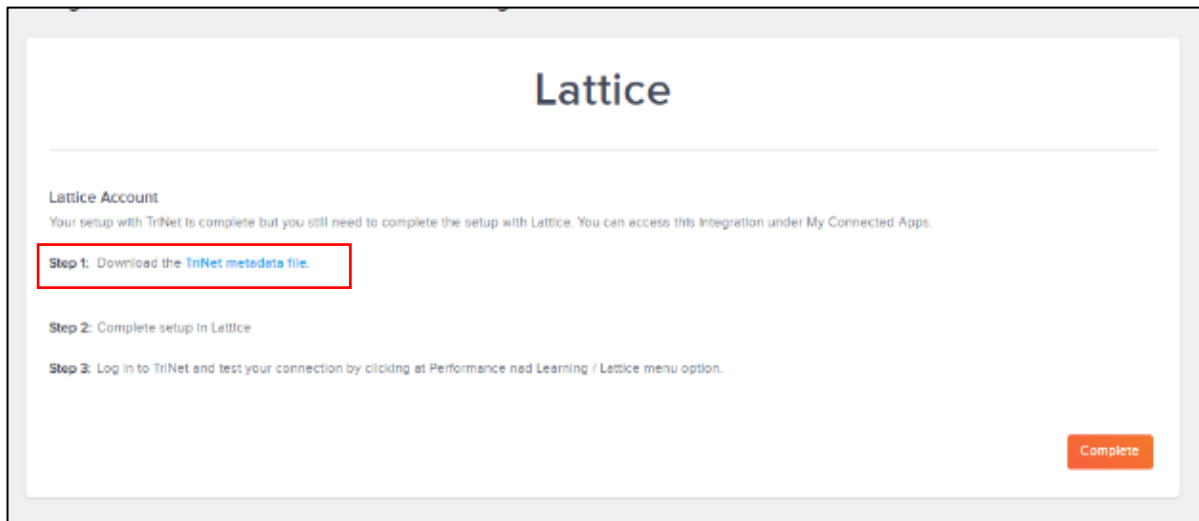https://router.latticehq.com/sso/[subdomain]/acs

"[subdomain]" is your Lattice subdomain. For example, if your organization's Lattice URL is "https://bigco.latticehq.com", "bigco" would be your subdomain and your ACS URL would be: https://router.latticehq.com/sso/bigco/acs


- Click **Next**.

- Download the TriNet Metadata File and click **Complete**. (You will need this information when setting up SSO in Lattice.)

Step 2: Complete Setup in Lattice
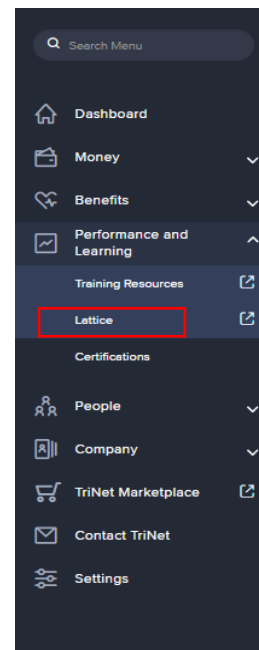
In Lattice, go to the SSO Setup Page.

- Enter the **Admin** page from the left-side menu.
- Click **Settings**.
- Click **Single sign-on**.

- You have the option to force employees and/or Admin to log in using SSO.

- Copy and paste the TriNet Metadata File from the previous TriNet step into the XML metadata section.

- Click **Save.**
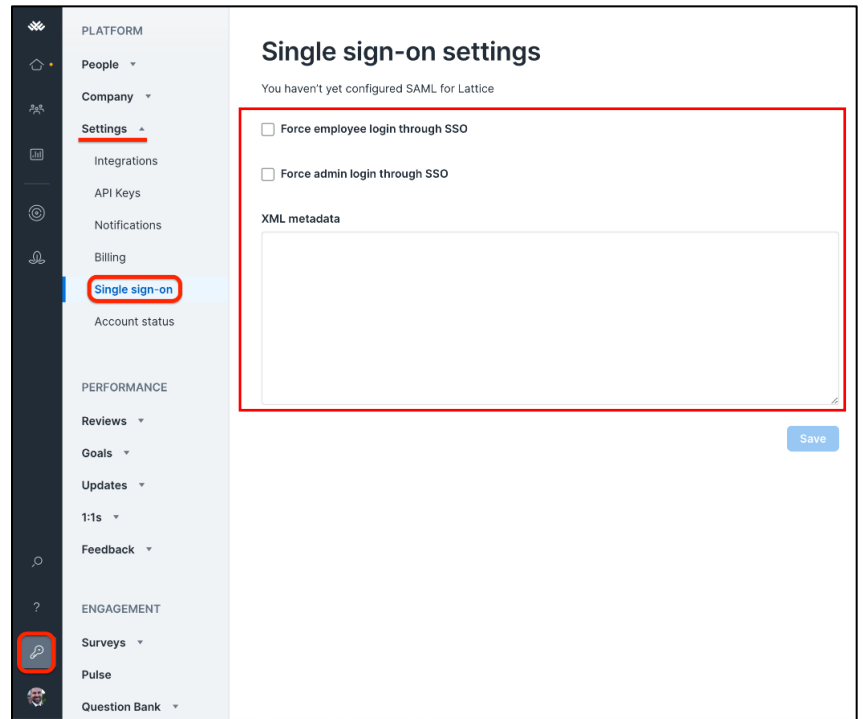
Step 3: Test Single Sign-On (SSO)

To ensure your SSO setup works:

- In the TriNet platform, make sure you are in the Employee view.
- Go to **Performance and Learning**
- If the connection worked, Lattice will display in the menu.