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TriNet Plus Lattice Integration Center

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Account Administrator needed on your Texas Workforce Commission account

Acknowledge an upcoming tax debit for May 2022 California SUTA

Level Of Service Update to Full Service

Some of your workers' hours may not make it into your Jun 22 - Jun 28 pay run

You are on the new Payroll experience.

We've improved Payroll with a streamlined design to help you complete your **tasks quickly and more easily**. You'll be able to switch to the legacy version until **March 15, 2025**.

Switch to Legacy Version

Payrolls

Filters

Filter By:

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All

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All

Pay Date

09/13/2023 - 03/25/2025

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Payroll run for Feb 26-Mar 04

Est. Total Cost \$1,373.85

Approve Today

Pay Date: 3/19/2025

Weekly

Draft

Payroll run for Mar 05-11

Est. Total Cost \$1,373.85

Calendar

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Mar 2025

S M T W T F S

23 24 25 26 27 28 1

2 3 4 5 6 7 8

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.

```

graph LR
    TriNet[Trinet] -- "Daily CSV File" --> Lattice[Lattice]
    TriNet -- "Single Sign-On" --> Lattice
  
```

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.

Configure the Daily CSV File

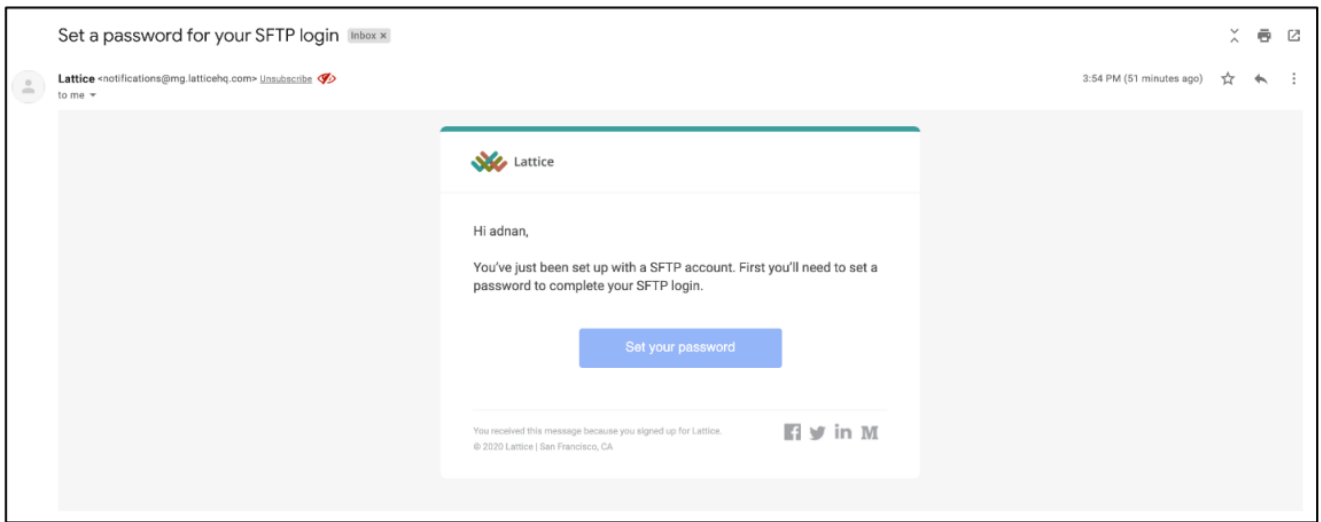
Step 1: Initiate the SFTP Connection at Lattice

Information you will need:

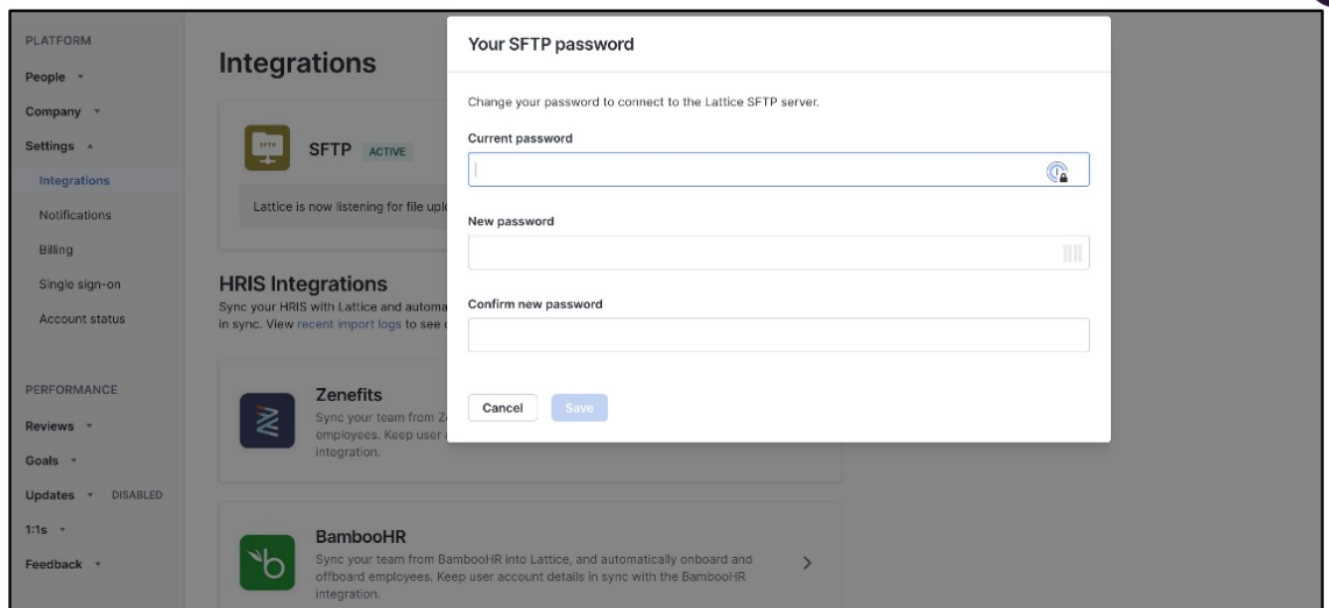
Lattice SFTP Username	Provide the Username for facilitating the SFTP flow. This is required to schedule the SFTP report in Reports & Analytics at TriNet.
Lattice SFTP Password	This is required to schedule the SFTP report in Reports & Analytics at TriNet.

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:



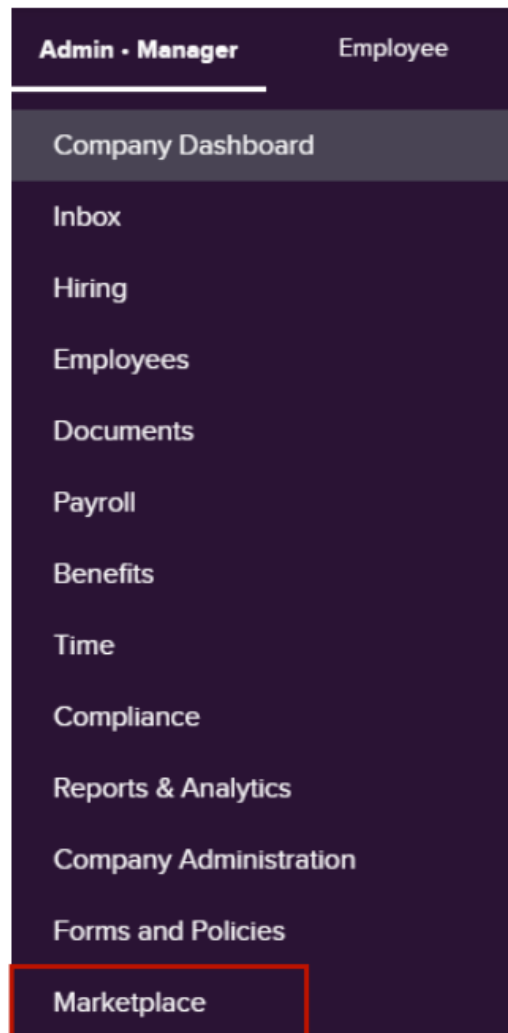
- Create your password, click "Save", and your SFTP connection with Lattice is complete.

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.

A screenshot of a web form titled 'Lattice'. Below the title is a instruction: 'Please enter the Lattice SFTP username and password and click Connect.' There are two input fields: 'Username' with the text 'trinetdevteam' and 'Password' with masked characters '*****'. At the bottom left is a 'Cancel' button and at the bottom right is a 'Connect' button.

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.

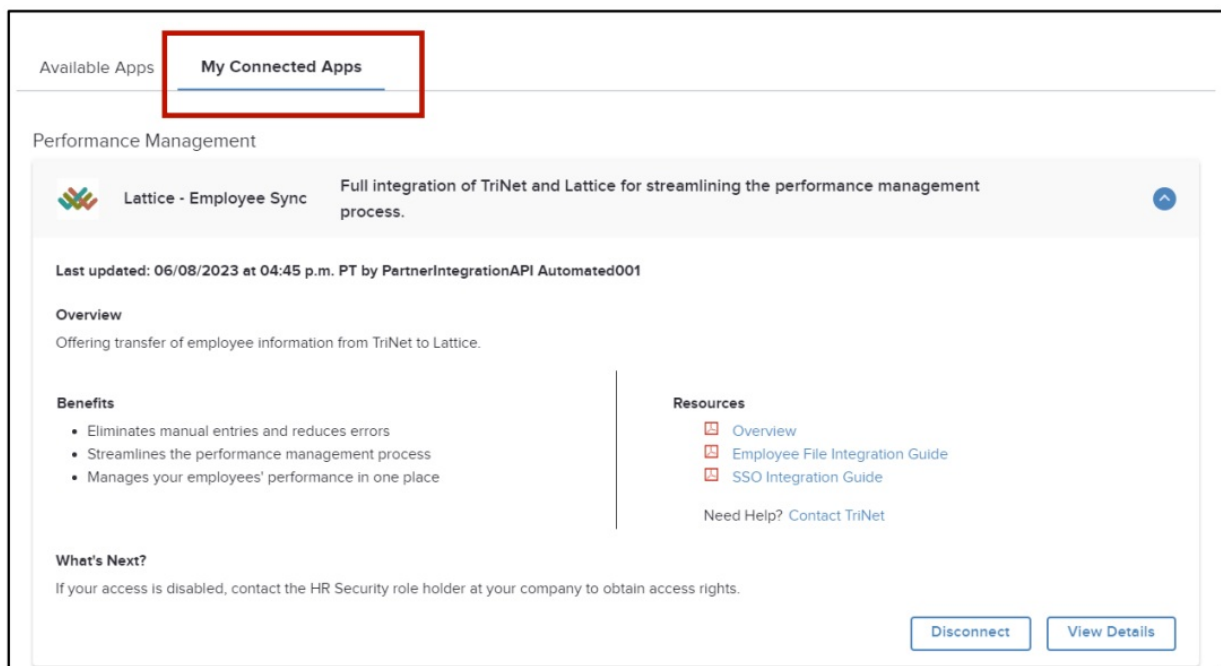
- Password: Enter password created in Step 1.
- Click Connect to establish the integration. The system will perform a test connection

at this time to ensure the credentials provided are valid.

- Once the connection is successful, you will receive a confirmation page:



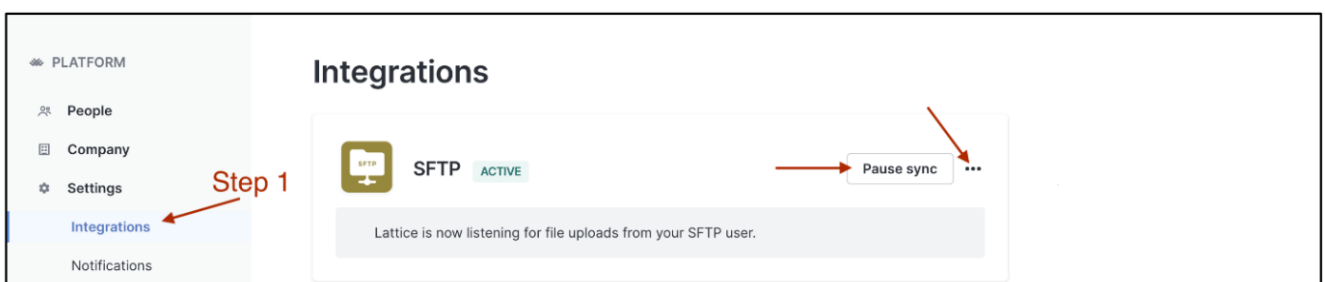
- After completing your setup, the Lattice – Employee Sync will be moved to My Connected Apps:



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

Step 3: Monitoring

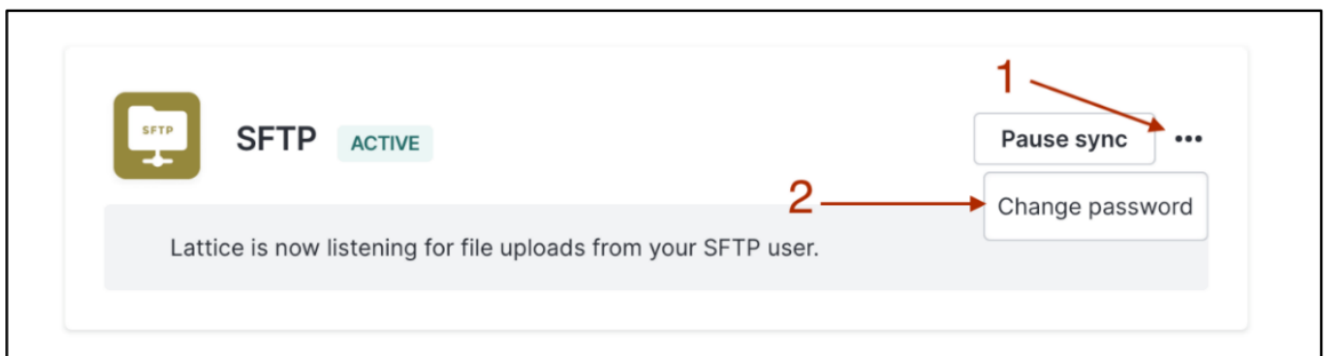
- After configuring SFTP, you'll have access to some settings on the Integrations page in Lattice.
- In Lattice, navigate to the Admin section > Settings (on the left) > Integrations (below Settings)



- 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.


Event	Description	Started by	Updated at
✓ SFTP sync		Automated	Mar 8, 2021 - 6:02 PM PST
! SFTP sync		Automated	Mar 5, 2021 - 6:03 PM PST
! SFTP sync		Automated	Mar 4, 2021 - 6:03 PM PST
✓ SFTP sync		Automated	Mar 3, 2021 - 6:03 PM PST
✓ SFTP sync		Automated	Mar 2, 2021 - 6:03 PM PST
✓ SFTP sync		Automated	Mar 1, 2021 - 6:03 PM PST
✓ SFTP sync		Automated	Feb 26, 2021 - 6:02 PM PST
✓ SFTP sync		Automated	Feb 25, 2021 - 6:02 PM PST
✓ SFTP sync		Automated	Feb 24, 2021 - 6:02 PM PST
✓ SFTP sync		Automated	Feb 23, 2021 - 6:02 PM PST
✓ SFTP sync		Automated	Feb 22, 2021 - 6:02 PM PST

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:

-  **SFTP sync**

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

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.
-  **Failed to sync**

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.

SFTP sync

Date: Jun 4, 2021 - 3:40 PM PDT

Initiated by: Automatic

File: uploads/SFTP-Degree-Employees-Jun-04-2021.csv

ⓘ Skipped 85 employee changes. Make changes in your HRIS and sync again.

- 85 Employees are missing 'Email'

✓ Successfully synced employee changes: 15 updated

Search status, ID, email, name...

All statuses

Status	Details	Email	Employee name	Details for IT
Skipped	ⓘ Missing field 'Email'	--	London Brock	view
Skipped	ⓘ Missing field 'Email'	--	Arielle Bruce	view
Skipped	ⓘ Missing field 'Email'	--	Kamron Burch	view
Skipped	ⓘ Missing field 'Email'	--	Rubi Calhoun	view

Help

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

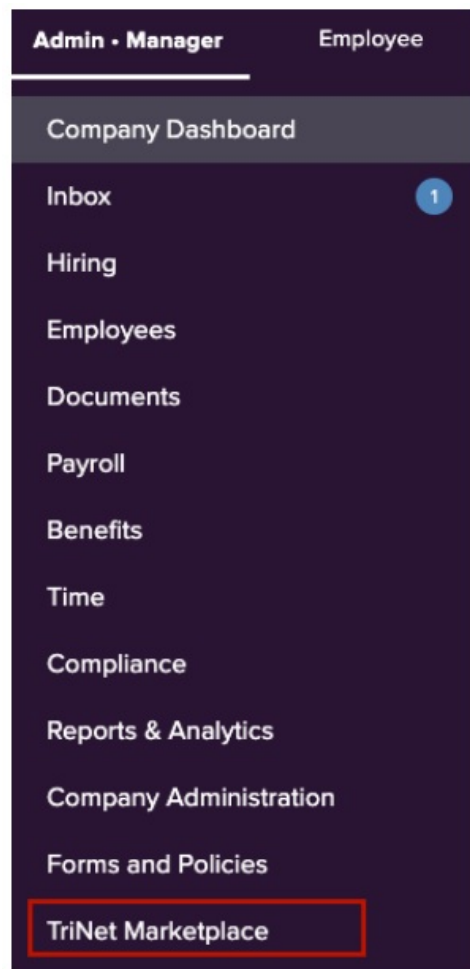
Useful Links:

- <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>

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.

A screenshot of a web form titled 'Lattice'. Below the title is a horizontal line, followed by the instruction 'Please enter the Lattice Entity ID and Assertion Consumer Service URL.' The form is divided into two sections. The first section, labeled 'Step 1:', contains a label 'Entity ID' followed by a text input field. The second section contains a label 'ACS-URL' followed by a text input field. At the bottom left of the form is a 'Previous' button, and at the bottom right is a 'Next' button.

- **Provide the following information:**
 - **Entity Id:** [https://router.latticehq.com/sso/\[subdomain\]/metadata](https://router.latticehq.com/sso/[subdomain]/metadata)
- **ACS URL:**
 - [https://router.latticehq.com/sso/\[subdomain\]/acs](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>.



Lattice

Please enter Lattice Entity ID and Assertion Consumer Service URL

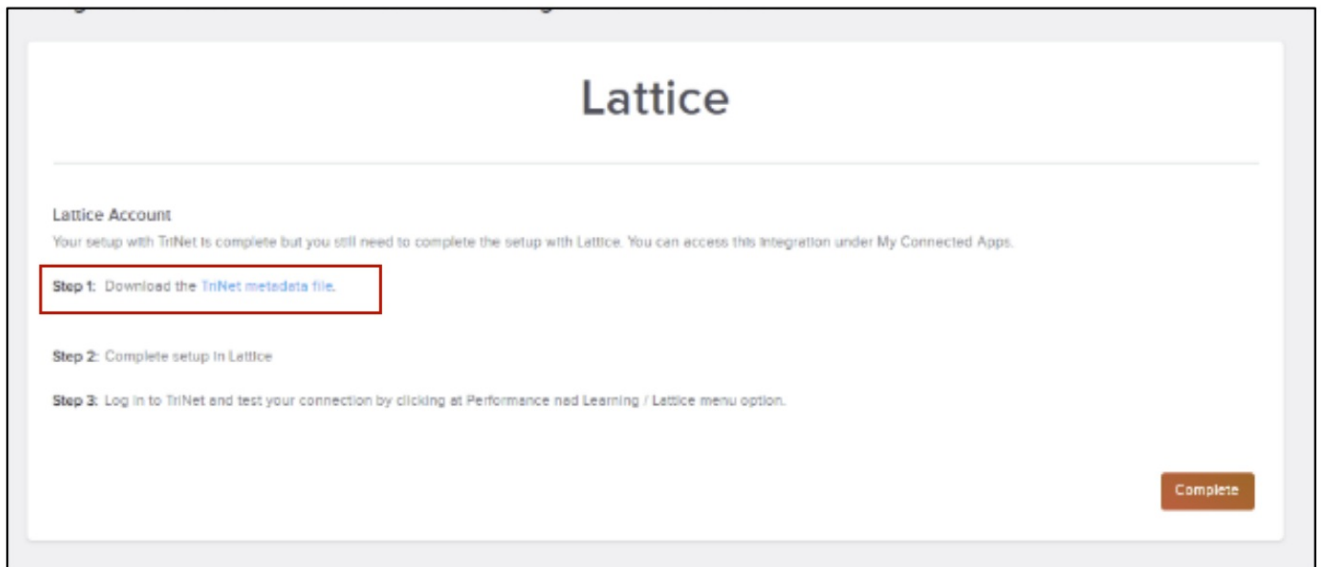
Step 1:

Entity Id

ACS URL

[Previous](#) [Next](#)

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



Lattice

Lattice Account

Your setup with TriNet is complete but you still need to complete the setup with Lattice. You can access this integration under My Connected Apps.

Step 1: Download the [TriNet metadata file](#).

Step 2: Complete setup in Lattice

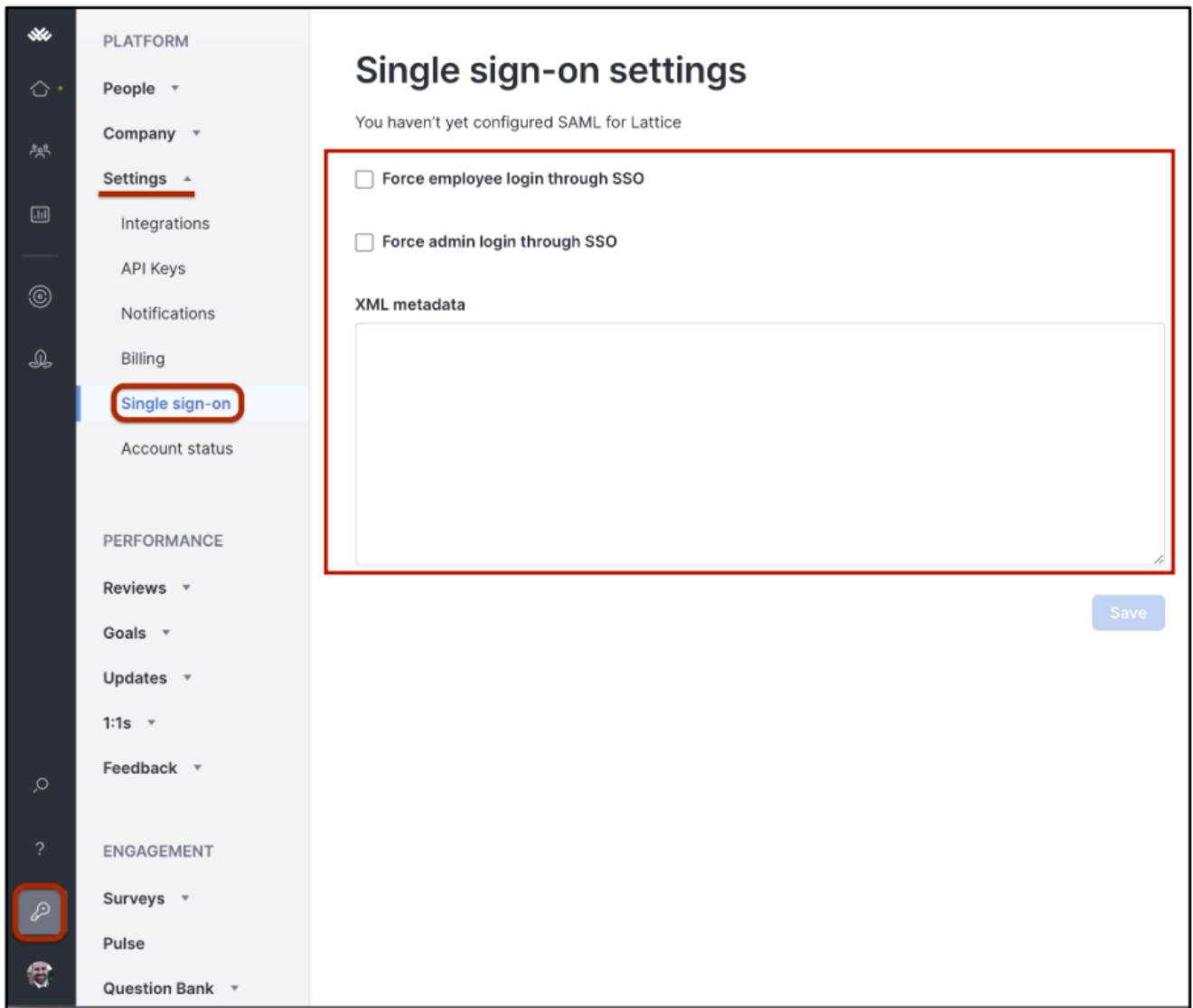
Step 3: Log in to TriNet and test your connection by clicking at Performance and Learning / Lattice menu option.

[Complete](#)

Step 2: Complete Setup in Lattice

In Lattice, go to the SSO Setup Page.

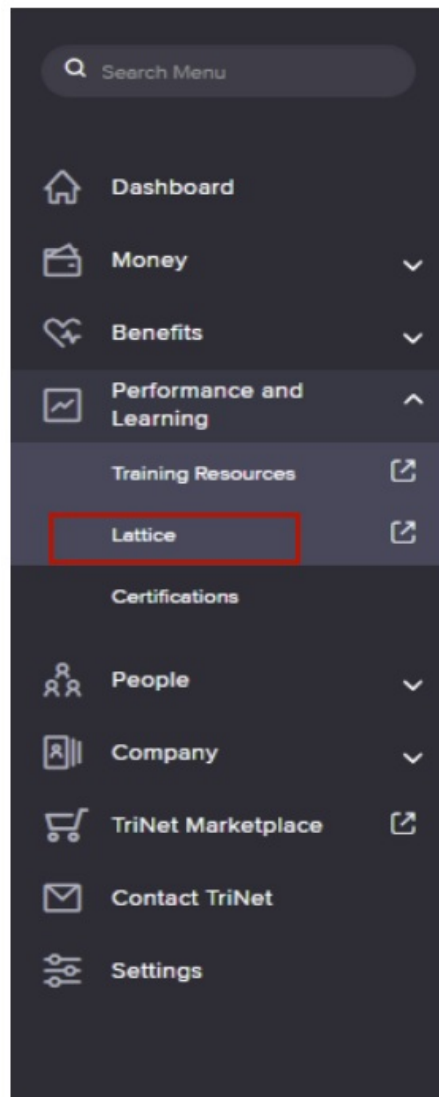
- Enter the Admin page from the left-side menu.
- Click Settings.
- Click Single sign-on.
- You have the option to force employees and/or Admin to log in using SSO.
- Copy and paste the TriNet Metadata File from the previous TriNet step into the XML metadata section.
- Click Save.



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.




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FAQs

- **Q: What happens if an employee is terminated in TriNet?**
 - **A:** If an employee is terminated in TriNet and doesn't have an account in Lattice, no information will be transferred for them. If the employee has an account in Lattice, their account will be deactivated, and they will no longer be able to log in.
- **Q: How are newly created users in Lattice handled after the daily CSV file import?**

- **A:** Newly created users in Lattice will remain in a Created state after the import. They can be invited all at once or individually, following the steps provided in the user guide.

Documents / Resources

	trinet TriNet Plus Lattice Integration Center [pdf] User Guide TriNet Plus Lattice Integration Center, Lattice Integration Center, Integratio n Center
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References

- [User Manual](#)

Integration Center, Lattice Integration Center, trinet, TriNet Plus Lattice Integration
trinet Center

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