

User Sync Guide



About	3
About this guide	
For Admins Only	
Requirements	
Introduction	4
Common Questions	
Data	
Setting Up	6
Choosing an Identity Provider	
Syncing with Yammer	
Syncing with Microsoft	
Additional Information	11

About

About this guide

The Recognize user sync guide details how company administrators can set up user synchronization with a company's corporate user directory. At this time, we support syncing:

- **Yammer**
- **Microsoft Cloud** *Azure AD, Office 365, or Exchange online*

For Admins Only

This guide is intended for system and company administrators.

Requirements

- A Recognize account that is in trial or has been purchased with full access to the Recognize company admin portal.
- A user with administrator privileges to the identity provider that is desired to be synced (Yammer or Microsoft).
- **If you do not wish to sync your entire organization**, you must have one or more groups or distribution lists setup in your corporate directory that contain the users you would like to sync.

Introduction

Common Questions

What is the user sync?

The Recognize user sync is a process that provides a way for companies to keep their Recognize user directory in sync with their corporate user directory. Once setup, it no longer requires further management. The typical amount of time required for configuration depends on the identity provider but ranges from 15m to a few hours (see the section on choosing an identity provider for more information).

When is it run?

The user sync is run nightly. We connect to the identity provider and user directory of your choice (Yammer or Microsoft) and synchronize the users based on a few parameters. You can sync your entire organization or you can pick groups to synchronize. You can also initiate a sync at any time via the Settings page in the company admin portal. The time it takes to execute a full sync depends on the size of your directory and the size of the queue in our background tasks server. For most of our customers, it can range from 15m to 2 hours.

How secure is our data?

Recognize connects via industry standard OAuth v2 protocol to access your organizations user directory. We obtain a token that is used to access user directory data via your sync provider's api. In the case of Yammer, the token does not expire. For Office 365, we connect to the Microsoft Graph API and the token expires on a periodic basis and is refreshed on an as needed basis. No extra administrator action is required to refresh the token. Recognize only takes read-only actions via these apis. Administrators may choose to revoke access at any time.

What about syncing groups?

You can also specify if you would like to sync Recognize Teams to your directory's groups to more closely mirror your internal structure and encourage friendly competition and reporting among your business units.

Are notifications or invites sent out?

When users are synced, they are added to the Recognize directory, but no emails or notifications are sent out. We have a "bulk invite" feature on our Accounts page in the company admin portal where you can customize the invitation email and send it out at a time of your choosing.

What happens to users when they are removed from the corporate directory?

When a user is removed from the corporate directory, the user sync detects this and simply "disables" the user. This means they can no longer log in and access their account. However, the recognitions they may have sent will remain in the system and the points received from those recognitions remain awarded to the recipients. If you wish to fully delete users from the system, please contact us at support@recognizeapp.com.

What happens when a user changes their name, email, avatar or other attribute?

The user sync not only adds users and disables them but also updates all the attributes we sync upon creation. If a user changes their name, email, avatar, job title or any other attribute(see the Data section below), we will update that data if it is present in the identity provider's api.

Data

The data that is available to sync is as follows:

- email
- first name
- last name
- manager (optional)
- avatar
- birthday(optional, day/month only)
- hire date(optional, not available with Yammer)
- job title
- team/group affiliations
- phone number (optional)
- display name (optional)

Setting Up

Choosing an Identity Provider

It is common for companies to have both Yammer and Microsoft. If you have a choice, **we recommend Microsoft**. Here is a brief description of the differences between the two providers.

Yammer

Syncing with Yammer is often easier and requires less IT involvement. In most cases, any standard user can authenticate and initiate a sync. In some cases, an admin on your Yammer network is required. Also, Yammer is much more limited in terms of the data that can be synced. For instance, Yammer does not have a data field for hire date and thus you will not be able to sync hire dates for use with Recognize's Anniversary feature.



Microsoft

Syncing with Microsoft can be a bit more involved but is also more robust. Microsoft's api allows us to sync manager, hire date, and birthday for full use of the Recognize platform. A common problem with syncing with Microsoft is that companies do not often have groups that directly match the users they would like in their Recognition platform. Companies often sync their on-premise Active Directory with Azure AD, and the hierarchy present in 'on-prem' AD is not present in Azure AD. Therefore, this typically requires more IT involvement in order to get the groups in the right shape for syncing.





Syncing with Yammer

Visit the Company Admin > Settings > User Sync section to get started. Begin by clicking **“Authenticate with Yammer”**. Remember, it is recommended you are an administrator on your Yammer account.

The screenshot shows the Recognize web interface. The top navigation bar includes icons for Stream, Recognize, Stats, Users, Badges, and Rewards, with the word "Recognize" on the right. A left sidebar lists navigation options: Company Dashboard, Dashboard, Custom Badges, Rewards, Notifications, Roles, Anniversaries, Accounts, Top Employees, Recognitions, Comments, and Settings (highlighted). The main content area is titled "User Sync" and features a "CFF Sync Enabled" toggle. Below it is a "Choose sync provider" dropdown menu set to "Yammer". A prominent blue button labeled "Authenticate with Yammer" is highlighted. A warning message states: "You must authenticate with Yammer and be an administrator with Yammer in order to edit the group that will be synced." Underneath, there are sections for "Recognition sending limits" with "Limit: the number of badges that can be given." and "Default: 10 Daily". A descriptive note says: "This limits the default total number of recognitions a user can send. This is for badges; without limits on the custom badges page." A "Global: 10 Daily" setting is also shown with a note: "This limits the total number of recognitions a user can send, regardless of the badge settings on the custom badge page." A "Save badge limits" button is at the bottom.

Allow permission for Recognize to access your Yammer account

The screenshot shows a Yammer authentication consent screen. At the top left is the Yammer logo with the tagline "The Enterprise Social Network". The main heading is "Log in with your Yammer account". Below it, it says "Connect Recognize by Recognize to your Yammer account." A visual representation shows a user profile icon (labeled "Not Mary McAllister? (Sign out)") with bidirectional arrows connecting to the Recognize app icon. On the right, the Recognize app icon is shown with the text "Recognize by Recognize (recognizeapp.com)". Below this, it states: "Your credentials will be forwarded to Recognize on the recognizeapp.com network." and "It will be able to access and update your data." At the bottom left, it says "By proceeding you agree to Terms of Service." At the bottom right, there are two buttons: "Allow" (highlighted) and "Deny".

After authenticating, return to the Company Admin > Settings > User Sync section.

If you would like to sync your entire network, leave the **groups** section blank. Otherwise, specify a group or groups that you would like to sync.



Configure whether you would like to mirror Yammer groups to Recognize teams. When ready, switch the toggle for "Sync enabled" to turn on the sync. The sync will proceed that night or if you want to expedite things, click "Run user sync" and the sync will be added to our background task server.

NOTE: Currently, there is no notification when the sync has completed, you will just need to check back.



Syncing with Microsoft

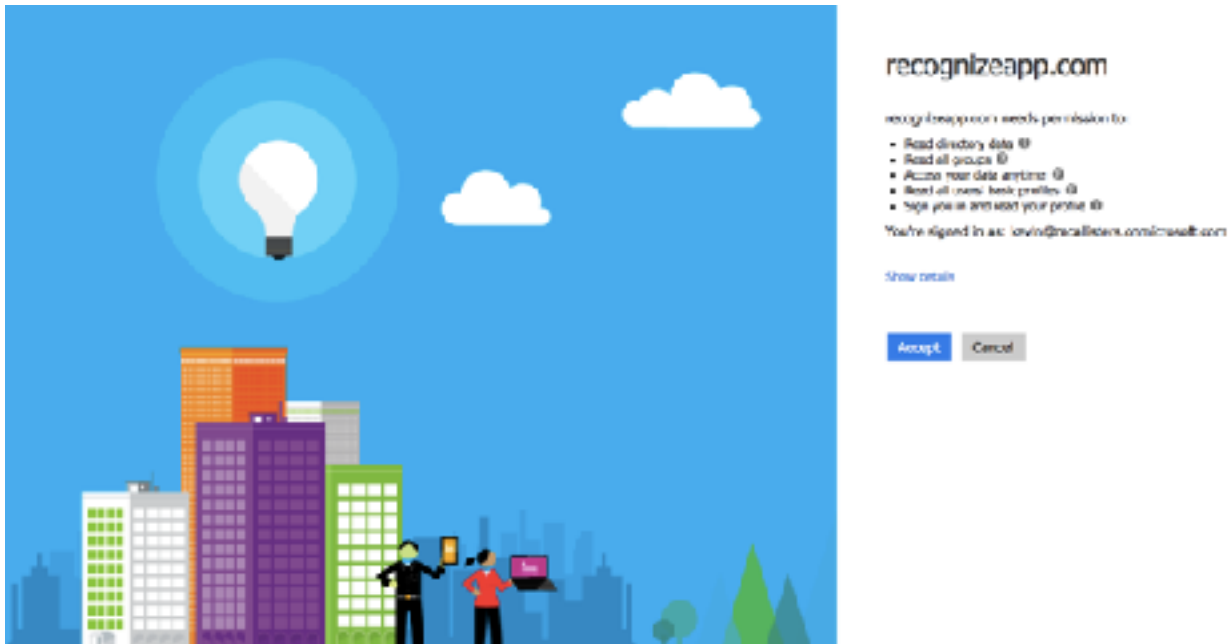
Begin by clicking **“Authenticate with Microsoft / Office 365”** to authenticate your admin account with Microsoft. Visit the Company Admin > Settings > User Sync section to get started.

The screenshot shows the 'User Sync' settings page in the Recognize application. The page has a blue header with navigation icons for Stream, Recognize, Stats, Users, Badges, and Rewards. The user profile 'Mary McRinter' with 'December Points 0' is visible in the top right. A left sidebar contains a 'Company Dashboard' menu with options like Dashboard, Custom Badges, Rewards, Notifications, Roles, Anniversaries, Accounts, Top Employees, Recognitions, Comments, and Settings. The main content area is titled 'User Sync' and features a 'Sync Enabled' toggle set to 'OFF'. Below this is a 'Choose sync provider' dropdown menu currently set to 'Microsoft / Office 365'. A prominent blue button labeled 'Authenticate with Microsoft / Office 365' is displayed. A note states: 'You must authenticate with Microsoft / Office 365 and be an administrator with Microsoft / Office 365 in order to create the groups that will be synced.' Underneath, there are two sections for 'Recognition sending limits'. The first section, 'Limit the number of badges that can be given', has a 'Default' dropdown set to '10' and a frequency dropdown set to 'Daily'. A note explains: 'This limits the default total number of recognitions a user can send. This is for badges without limits on the custom badges page.' The second section, 'Limit the total number of recognitions a user can send, regardless of the badge settings on their custom badge page', also has a 'Default' dropdown set to '10' and a frequency dropdown set to 'Daily'.

Select which account you would like to authenticate as.

The screenshot shows the authentication screen for the Recognize app. The background features a stylized cityscape with colorful buildings and a large glowing lightbulb icon in a blue circle against a blue sky with white clouds. The URL 'recognizeapp.com' is displayed at the top right. Below the URL, the text 'Which account do you want to use?' is shown. There are two options: a blue button with a user icon, name 'Mary McRinter', email 'mcrinter@msn.com', and 'Signed in' status; and a blue button with a plus sign and the text 'Use another account'. At the bottom, the copyright notice '© 2018 Microsoft. All rights reserved.' and the Microsoft logo are visible.

Allow permission for Recognize to access your Microsoft cloud account.



After authenticating, return to the company admin > settings > user sync section.

If you would like to **sync your entire organization, leave the groups section blank**. Otherwise, specify a group or groups that you would like to sync.



Configure whether you would like to mirror Microsoft groups to Recognize teams. The sync will proceed that night or if you want to expedite things, click "Run user sync" and the sync will be added to our background task server.

NOTE: Currently there is no notification when the sync has completed, you will just need to check back. If you need help or confirmation the sync has completed, please email support@recognizeapp.com

Additional Information

- At this time, selective choosing of which data to sync is not possible. We sync all the data specified in the Data section depending on availability from the identity provider.
- If you do not want to or cannot sync your user directory, we support "just-in-time" user provisioning. This is where we create accounts and permit access to Recognize when a user logs in via OAuth or SAML. Please see our SAML documentation available at <https://recognizeapp.com/resources>