



DATASYNC USER MANUAL

Setup Data Synchronization with Compliance Platform

Table of contents

1. Introduction.....	3
2. Employee Data	3
2.1. Security	3
2.2. Structure of an Employee Record	4
2.3. Roles	5
2.3.1 Synchronization.....	5
2.3.1.1. Standard Roles	6
2.3.1.2. Custom Roles	6
3. Connectors	8
3.1. System for Cross-domain Identity Management (SCIM)	9
3.1.1 Microsoft Entra	9
3.1.1.1. Step-by-Step Process.....	9
3.1.1.2. Role synchronization	17
3.1.1.3. Assigning multiple application roles to a user in Azure.....	21
3.1.1.4. Data Testing & Automatic Provisioning	22
3.2. Inbound JSON API	25
3.2.1 Step-by-Step Process	25
3.2.2 API Definition & Usage	25
3.3. Outbound JSON API	29
3.3.1 Step-by-Step Process	29
3.3.2 API Definition	31
3.4. SFTP/FTPS	35
3.4.1 Step-by-Step Process	35
3.4.1.1. JSON File Structure	36
3.4.1.2. XLSX File Structure	39
3.4.1.3. Custom Attributes	39
3.5. Microsoft Graph	41
3.5.1 Microsoft Entra.....	41
3.5.1.1. Step-by-Step Process	41
3.6. Personio.....	47
3.6.1 Step-by-Step Process	47
3.7. SAP Success Factors.....	53
3.7.1 Step-by-Step Process.....	53

3.8. Planerio.....	57
3.8.1 Step-by-Step Process	57
4. Frequently Asked Questions.....	60

1. Introduction

DataSync is a feature of the EQS Compliance Platform to automatically synchronize user accounts between your central user management provider and the EQS Data Center to automate the identity lifecycle management. With DataSync you can automate user creation, updating user information and user deletion.

2. Employee Data

The EQS Compliance software solutions only need a small amount of employee data, including a unique **Employee ID**, a unique **email address**, **first name** and **last name**. Further employee attributes help filter the employees and combine them into groups.

2.1. Security

The security of your data is a top priority. The transmission of the data is always encrypted via secure access. Further security settings in the client's firewall can be configured.

2.2. Structure of an Employee Record

In EQS Compliance Platform, the data of an employee record is divided. An employee record is made of the following attributes:

Attribute (* = required)	Example value
Employee Id (*)	178012
E-mail address (*)	Ada.Lovelace@eqs.com
First name (*)	Augusta
Last name (*)	Lovelace
Employee state	ACTIVE
Middle Name	Ada
Title	Mrs.
Academic Title	Dr.
Job Title	Mathematician
Preferred Language	EN
Phone	+4989123456
Mobile phone	+491721111778
Department	Development
Location	Oxford University
Supervisor's employee ID	175610
Business unit	Compliance
Country	GB
Tags ¹	[London", "Subcompany", "England"]
Roles ²	["manager", "supervisor"]

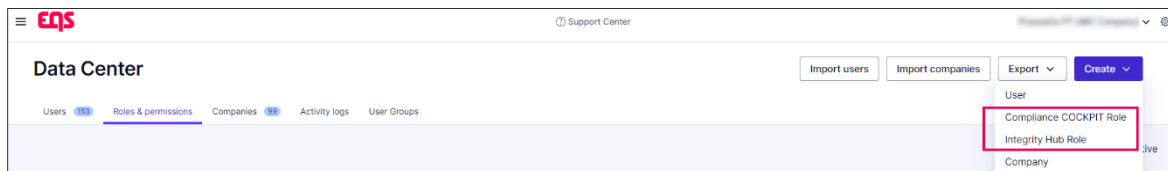
1 - Tags can be used to synchronize any custom data not covered in our model.

2 - Roles can be synchronized, but they need to first be set in Data Center.

2.3. Roles

The EQS Compliance Platform has two types of roles available for users:

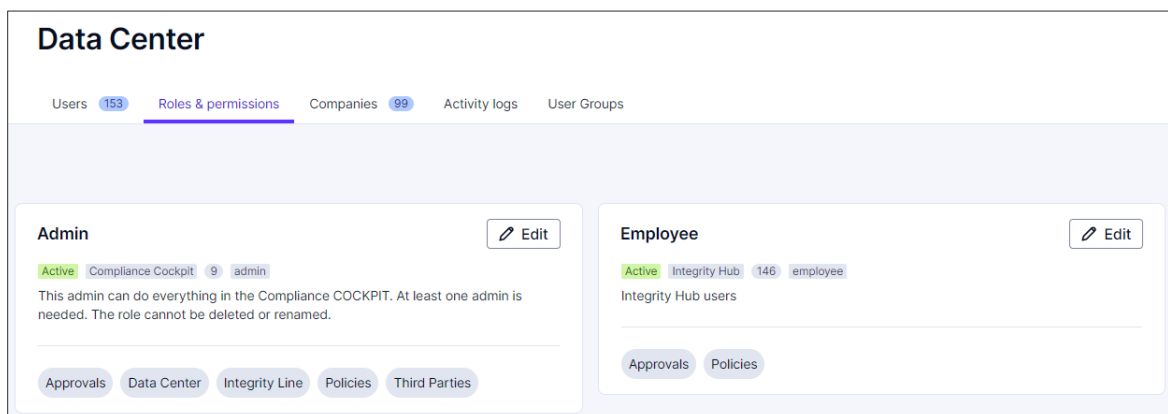
- **Compliance Cockpit Role**
- **Integrity Hub Role**



The EQS Compliance Platform license includes two default roles that cannot be deleted:

- **Admin** (Compliance Cockpit role)
- **Employee** (Integrity Hub role)

These standard roles ensure that essential access rights are maintained across the platform. Below is an example screenshot showing the default roles in the system:



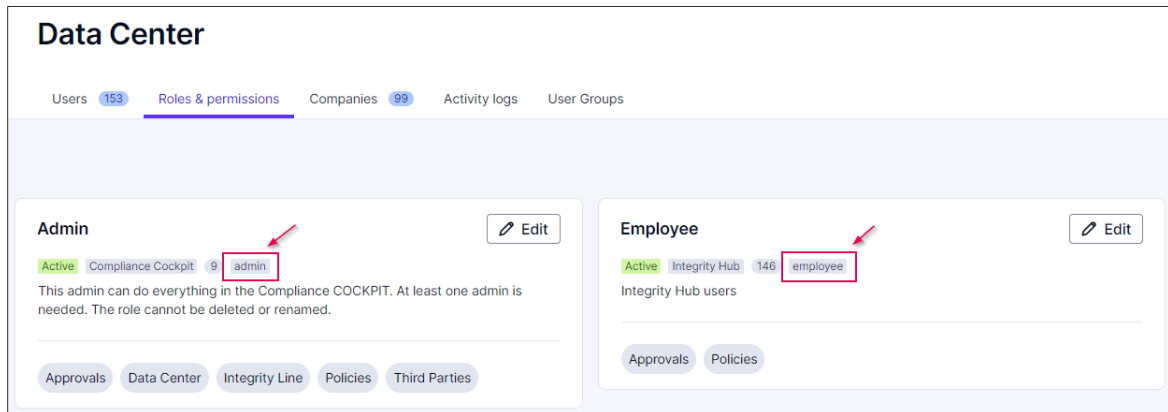
2.3.1 Synchronization

When synchronizing roles via DataSync, roles assigned to employees within your source system will be synchronized with the platform. Here's how roles are assigned based on the data sent from your system:

- **Integrity Hub Role (Employee):**
If your license includes Approvals or Policies applications the data sent by your source system does not need specify a role for an employee, **the user will be automatically created with the employee role.**
- If your license is only Integrity line, accounts must be assigned the role. You must explicitly send the *employee* role to grant them access to the Integrity Hub Portal. **Users sent without employee role will be created with no role or access to Integrity Hub.**

- **Compliance Cockpit Role (Admin):**

If an employee should have Admin access to the Compliance Platform, your system must explicitly send the *admin* role as part of the data. The standard Admin role of type Compliance Cockpit will then be assigned.



2.3.1.1. Standard Roles

Ensure that your system sends the correct role data for employees. In pseudo code, for example, to add the admin role to a user through DataSync:

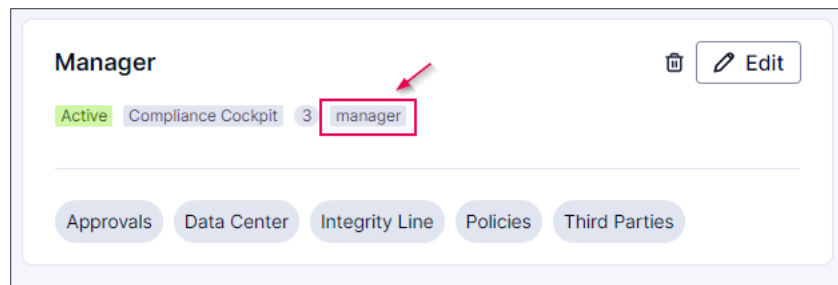
```
{
  "employeeid": "1550840",
  "state": "Active",
  "attributes": {
    "email": "REDACTED",
    "first_name": "Adama",
    "last_name": "REDACTED",
    "job": "Salesforce Architect REDACTED",
    "supervisor_employee_id": "1500371",
    "department": "Other Activities",
    "location": "REDACTED",
    "country": "FRA",
    "roles": ["admin"] (Note, this is an array, which means you can add more roles separate by a comma, e.g. ["supervisor", "sales"])
  }
}
```

2.3.1.2. Custom Roles

In addition to the standard roles, you can also create custom roles. To do this, follow these steps:

1. **Create the Custom Role in Data Center:**

- Navigate to Data Center and create a new role (Compliance Cockpit or Integrity Hub Role).
- Enter the required details in the role and activate the role.
- Be sure to note the **name** you assign to this role. The slug name displayed below will be used in the data sent from your source system.



2. Send the Custom Role in Your Data:

Once the custom role is created, ensure that your system sends this role in the data for any employee who should have this custom access. In pseudo code, for example:

```
{
  "employeeid": "1550840",
  "state": "Active",
  "attributes": {
    "email": "[REDACTED]",
    "first_name": "Adama",
    "last_name": "[REDACTED]",
    "job": "Salesforce Architect [REDACTED]",
    "supervisor_employee_id": "1500371",
    "department": "Other Activities",
    "location": "[REDACTED]",
    "country": "FRA",
    "roles": ["manager"] (Note, this is an array, which means you can add more roles separate by a comma, e.g. ["supervisor", "sales"])
  }
}
```

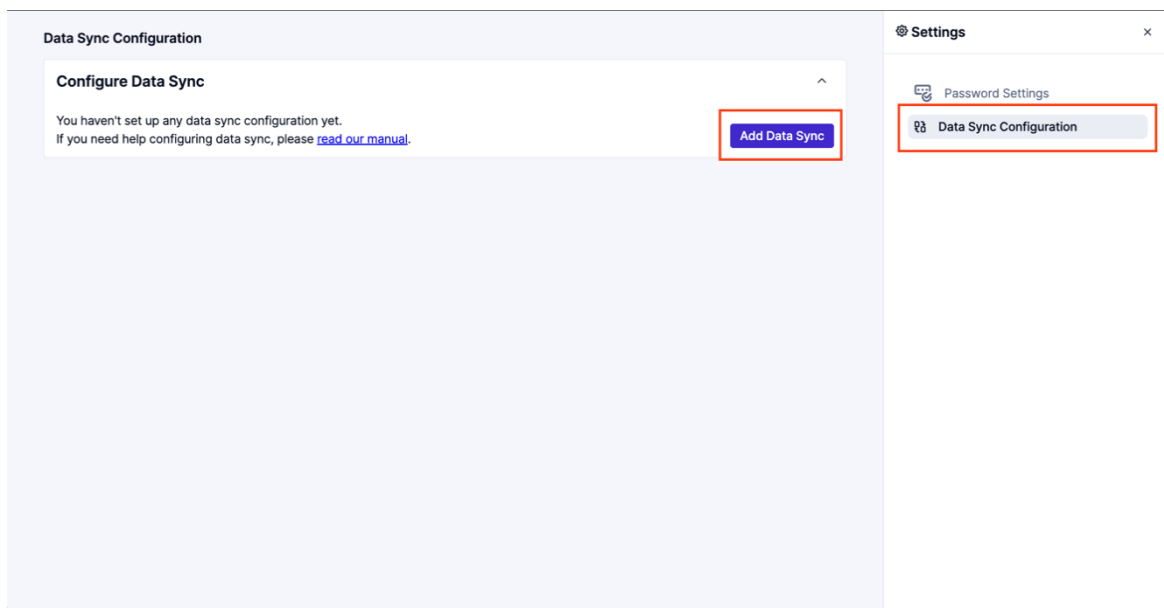
3. Connectors

Connectors in DataSync act as an interface between the system providing user information (like Microsoft Entra on the Azure Portal) and the EQS Data Center, which is the application to manage platform users, roles, etc.

One EQS Compliance Platform license can have multiple connectors.

Each connector is of a certain type, specifying which protocol is used to perform synchronizations between the systems.

DataSync connectors are managed inside the Compliance Cockpit, by clicking on the top-right gear icon to open the platform “Settings”. The “DataSync Configuration” entry offers everything to create, configure and delete every type of connector.



3.1. System for Cross-domain Identity Management (SCIM)

SCIM is a standard supported by DataSync as one option to synchronize users between your user directory and the EQS Compliance Platform.

3.1.1 Microsoft Entra

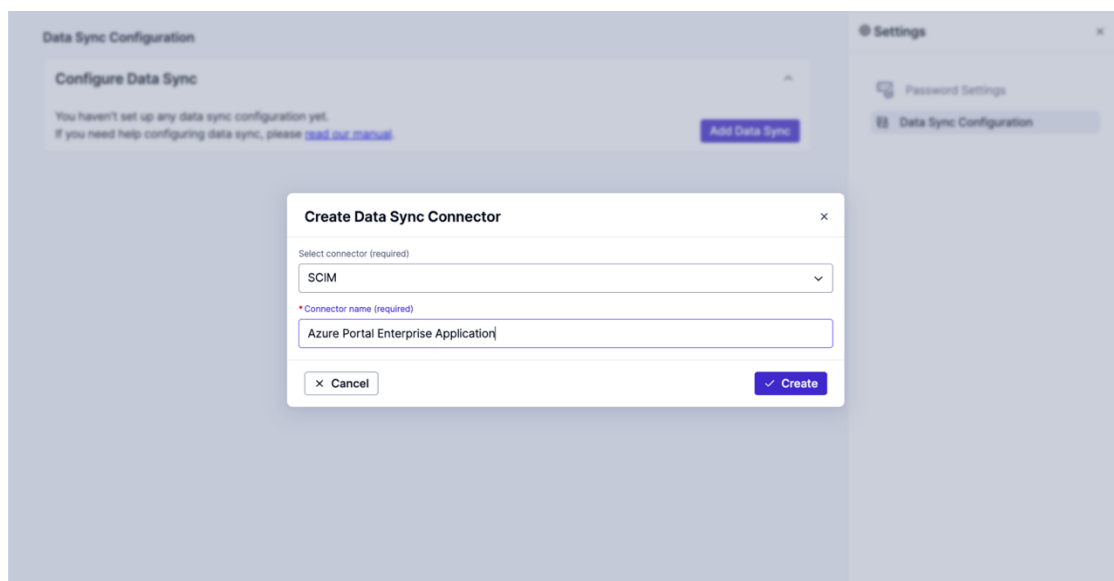
In this section we are going to set up DataSync with **Microsoft Entra**, Microsoft's application to automate identity lifecycle management.

This is done via the following steps:

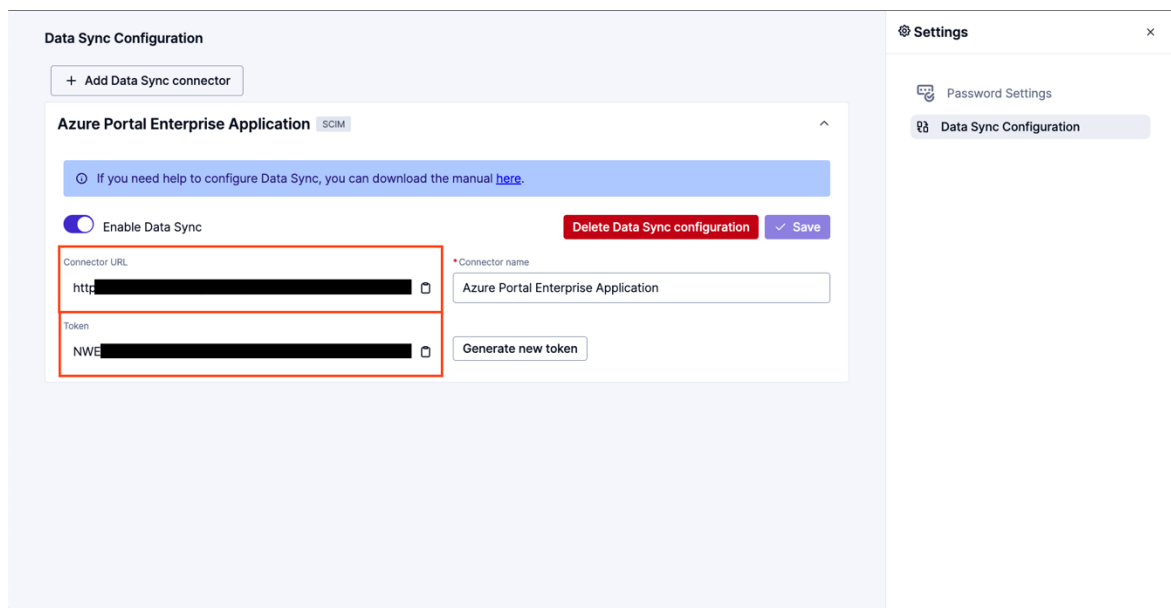
1. Create a new SCIM connector in the settings of the EQS Compliance Cockpit.
2. Configure an enterprise application in your Azure portal at <https://portal.azure.com>.
3. Configuring the Microsoft Entra mappings.
4. Start provisioning via the Azure portal.

3.1.1.1. Step-by-Step Process

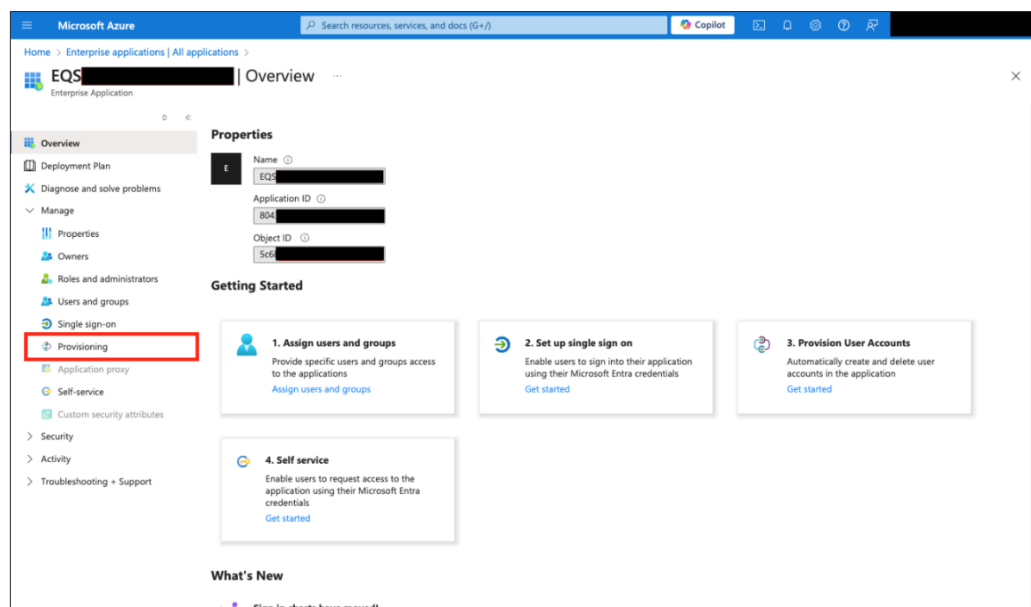
1. Log into EQS Compliance Cockpit with your user credentials.
2. Click the gear icon on the top-right to open the sidebar settings.
3. Select "DataSync Configuration," then click the "Add DataSync" button to open the connector creation dialog.
4. Make sure the "SCIM" connector is selected in the dropdown and enter a name for your connector, then click the "Create" button.



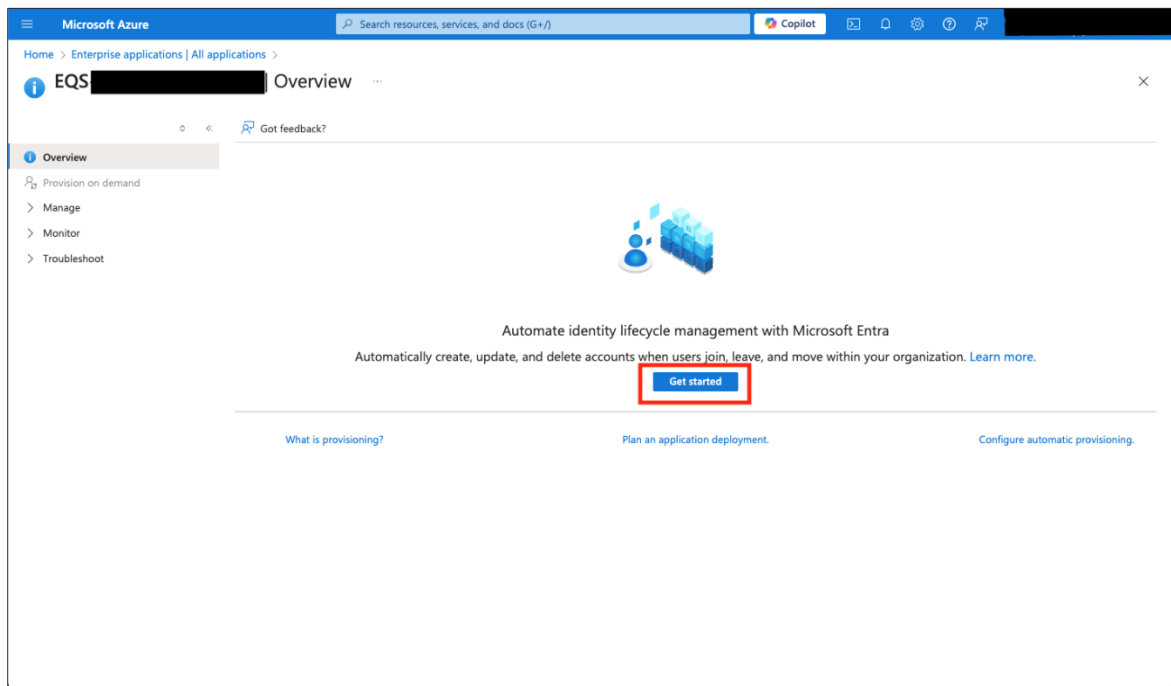
5. A new connector configuration panel is shown in the "DataSync Configuration" section. It displays two important fields: the connector URL and the token. Please save the displayed token value. The token is sensitive information and should be kept in a safe space. You are not going to be able to view the token again. If you lose your token, you must generate a new one, invalidating the previous one. You can do this via the "Generate new token" button. This displayed connector URL, and token is going to be configured in your Azure enterprise application in the next steps. The connector is enabled by default. If you disable it, every request made to this connector is going to be rejected by the EQS Data Center.



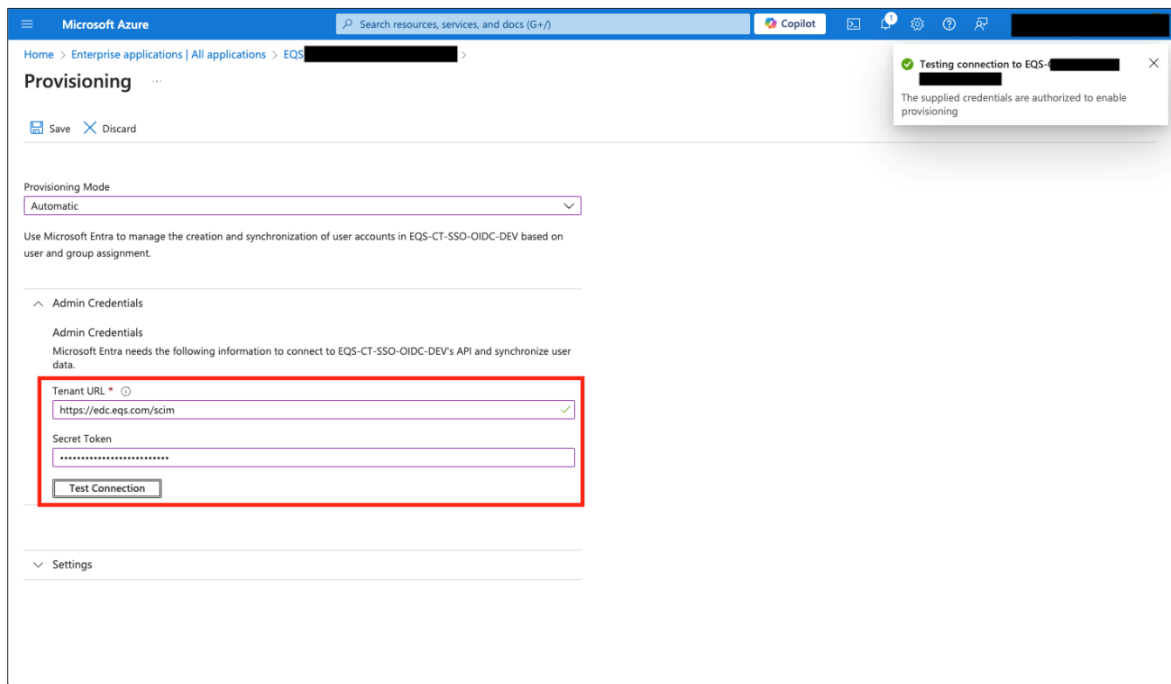
6. Open <https://portal.azure.com> and find your enterprise application, your IT department may want to create a new one. The enterprise application has user groups assigned to it and manages user provisioning. Once you have your enterprise application open, you can configure it by clicking on "Provisioning".



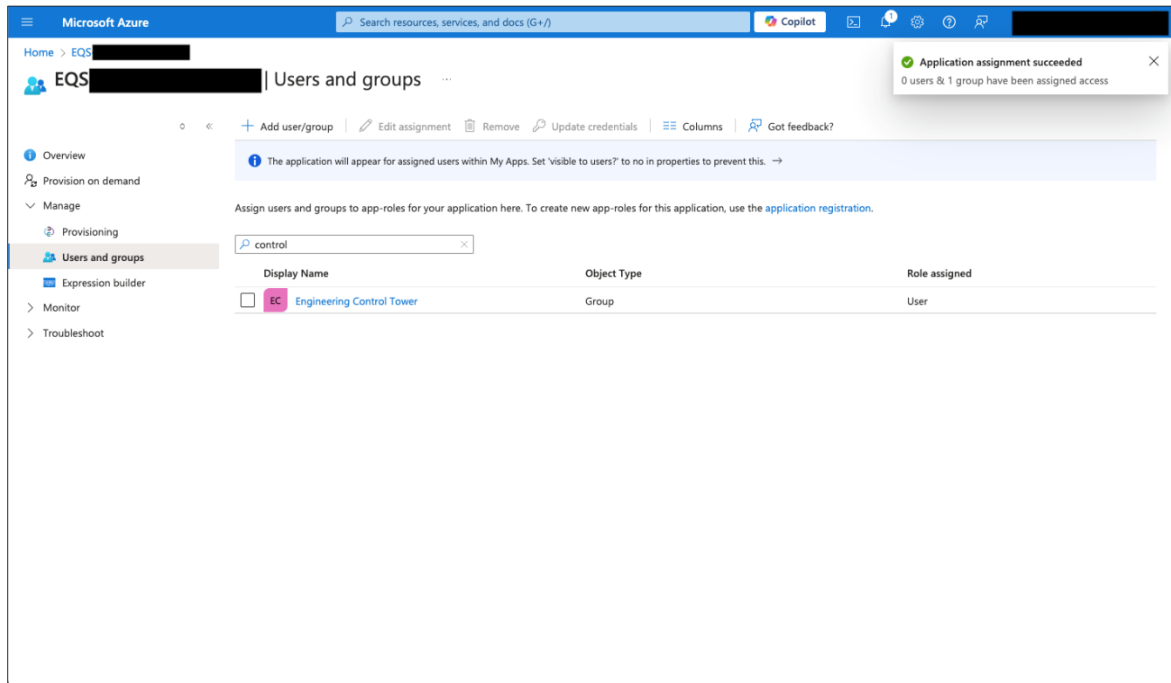
7. On the onboarding page, click “Get Started” to start configuring the provisioning.



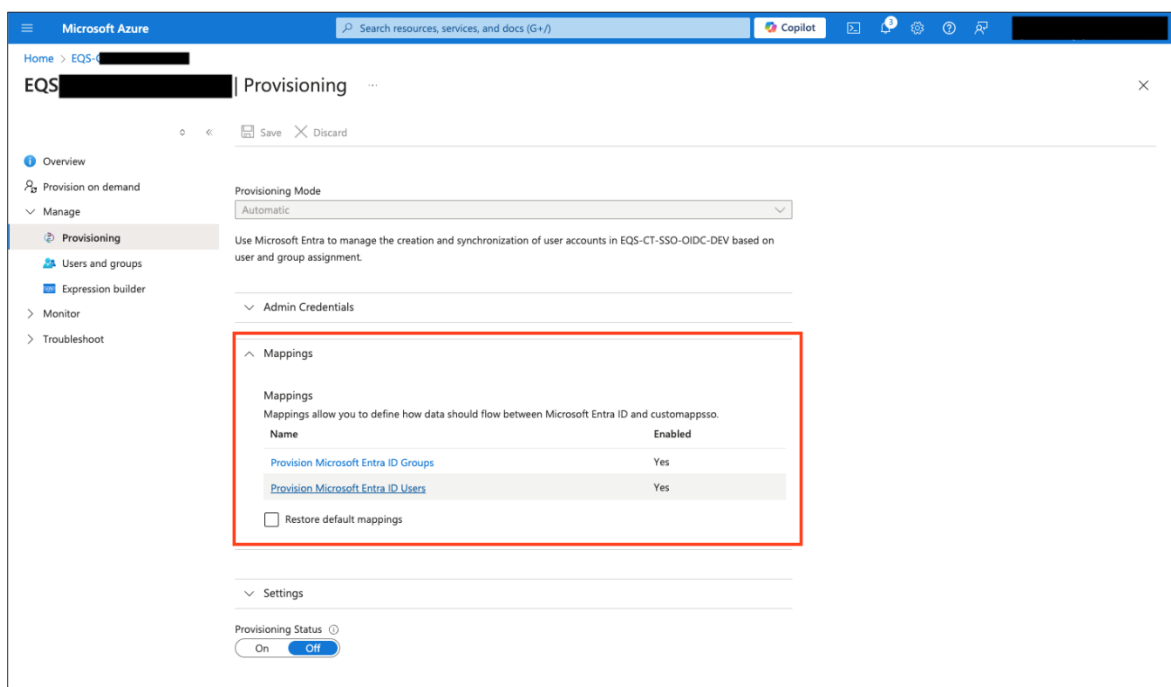
8. Now enter the Connector URL and Token value (refer Step 5 to know where to get this) into the “Admin Credentials” section. You can test if the connection works by clicking the “Test Connection” button.



9. Inside the “Users and Groups” section of your enterprise application, assign all users and/or groups which should have access to the EQS Compliance Cockpit and EQS Integrity Hub.



10. Next, configure the attribute mapping to define which user information will be sent to the EQS Data Center for each user. In the sidebar, go to Provisioning, then click Mappings, and select Provision Microsoft Entra ID Users.



- **Required Attributes, "id," "userName"** (the email used for login), **"familyName"** and **"givenName."**
- **Emails attribute:** The "emails" field exists only for compatibility with SCIM's default mapping. Our platform does not support multiple emails; the single email for an employee is "userName", so this field is read-only.
- **EmployeeNumber attribute:** While "employeeNumber" is not required, it is strongly recommended and prioritized for matching. Using it helps update manually created accounts while minimizing the risk of duplicate user accounts.

A JSON-Schema definition of all employee objects which can be sent to EQS Data Center can be found at this link: <https://api-compliance.eqscockpit.com/data-center/api/datasync/scim/Schemas>.

To add non-standard attributes like **BusinessUnit**, **externalCompany** and **Roles**, click on "Show advanced options", it will open more information, then click on "Edit attribute list for customappsso", you can find more details under Microsoft Entra [Editing the list of supported attributes](#) article:

customappso Attribute	Microsoft Entra ID Attribute	Matching precedence
unified:parameters:schemas:extension:enterprise:2.0:user:employeeNumber	employeeId	1
user:displayName	mail	2
score	switch([object]::empty, "fail", "true", "fail")	
displayName	displayName	
title	jobTitle	
emailType eq "work" value	mail	
preferredLanguage	preferredLanguage	
name:givenName	givenName	
name:familyName	surname	
addressType eq "work" country	Switch([Lower]([country]), "Other", "albania", "AL", "austria", "AT", "belgium", "BE", "bulgaria", "BG", "croatia", "HR", "czechia", "CZ", "denmark", "DK", "estonia", "EE", "finland", "FI", "france", "FR", "germany", "DE", "greece", "GR", "hungary", "HU", "iceland", "IS", "india", "IN", "italy", "IT", "japan", "JP", "korea", "KR", "latvia", "LV", "lithuania", "LT", "luxembourg", "LU", "malaysia", "MY", "mexico", "MX", "moldova", "MD", "montenegro", "ME", "netherlands", "NL", "newzealand", "NZ", "norway", "NO", "poland", "PL", "portugal", "PT", "romania", "RO", "serbia", "RS", "slovakia", "SK", "slovenia", "SI", "southafrica", "ZA", "spain", "ES", "sweden", "SE", "switzerland", "CH", "taiwan", "TW", "thailand", "TH", "turkey", "TR", "ukraine", "UA", "unitedkingdom", "GB", "usa", "US", "vietnam", "VN", "yemen", "YE")	
phoneNumbersType eq "work" value	telephoneNumber	
addressType eq "home" streetAddress	streetAddress	
addressType eq "home" locality	city	
addressType eq "home" region	state	
addressType eq "home" postalCode	postalCode	
addressType eq "home" country	Switch([Lower]([country]), "Other", "albania", "AL", "austria", "AT", "belgium", "BE", "bulgaria", "BG", "croatia", "HR", "czechia", "CZ", "denmark", "DK", "estonia", "EE", "finland", "FI", "france", "FR", "germany", "DE", "greece", "GR", "hungary", "HU", "iceland", "IS", "india", "IN", "italy", "IT", "japan", "JP", "korea", "KR", "latvia", "LV", "lithuania", "LT", "luxembourg", "LU", "malaysia", "MY", "mexico", "MX", "moldova", "MD", "montenegro", "ME", "netherlands", "NL", "newzealand", "NZ", "norway", "NO", "poland", "PL", "portugal", "PT", "romania", "RO", "serbia", "RS", "slovakia", "SK", "slovenia", "SI", "southafrica", "ZA", "spain", "ES", "sweden", "SE", "switzerland", "CH", "taiwan", "TW", "thailand", "TH", "turkey", "TR", "ukraine", "UA", "unitedkingdom", "GB", "usa", "US", "vietnam", "VN", "yemen", "YE")	
unified:parameters:schemas:extension:enterprise:2.0:user:department	department	
unified:parameters:schemas:extension:enterprise:2.0:user:manager	manager	
roles	AssertiveAppRoleAssignmentsComplex([appRoleAssignments])	

[Add New Mapping](#)

Add the values required:

addresses[type eq "home"].locality	String	☐	☐	☐	☐	info
addresses[type eq "home"].region	String	☐	☐	☐	☐	info
addresses[type eq "home"].postalCode	String	☐	☐	☐	☐	info
addresses[type eq "home"].country	String	☐	☐	☐	☐	info
addresses[type eq "other"].streetAddress	String	☐	☐	☐	☐	info
addresses[type eq "other"].locality	String	☐	☐	☐	☐	info
addresses[type eq "other"].region	String	☐	☐	☐	☐	info
addresses[type eq "other"].postalCode	String	☐	☐	☐	☐	info
addresses[type eq "other"].country	String	☐	☐	☐	☐	info
roles[primary eq "True"].display	String	☐	☐	☐	☐	info
roles[primary eq "True"].type	String	☐	☐	☐	☐	info
roles[primary eq "True"].value	String	☐	☐	☐	☐	info
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User...	String	☐	☒	☐	☐	info
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User.co...	String	☐	☐	☐	☐	info
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User.or...	String	☐	☐	☐	☐	info
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User.dv...	String	☐	☐	☐	☐	info
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User.da...	String	☐	☐	☐	☐	info
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User.m...	Reference	☐	☐	☐	☐	info
roles	String	☐	☐	☒	☐	info
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User.ma...	String	☐	☐	☐	☐	info
	String	☐	☐	☐	☐	0 selected

Tips

Be sure to add the attributes with its namespace, i.e., for BusinessUnit
urn:ietf:params:scim:schemas:eqs:datacenter:1.0:User:businessUnitName

This is the problematic mapping which has to be deleted:

Attribute Mappings

Attribute mappings define how attributes are synchronized between Microsoft Entra ID and custom apps.

Custom app attribute	Microsoft Entra ID attribute	Matching precedence
uri(iefParameters:schemaExtension:enterprise2.0:userEmployeeNumber)	employeeid	1
userName	mail	2
active	Switch(IfNotDeleted, "false", "true", "true")	
displayName	displayName	
title	jobTitle	
emailType eq "work" value	mail	
preferredLanguage	preferredLanguage	
name.givenName	givenName	
name.familyName	surname	
addressType eq "work" country	Switch(IfLower)(country, "Other", "albania", "al", "austria", "at", "belgium", "be", "bulgaria", "bg", "croatia", "hr", "czechia", "cz", "denmark", "dk", "estonia", "ee", "finlan...	
phoneNumberType eq "work" value	telephoneNumber	
addressType eq "home" streetAddress	streetAddress	
addressType eq "home" locality	city	
addressType eq "home" region	state	
addressType eq "home" postalCode	postalCode	
addressType eq "home" country	Switch(IfLower)(country, "Other", "albania", "al", "austria", "at", "belgium", "be", "bulgaria", "bg", "croatia", "hr", "czechia", "cz", "denmark", "dk", "estonia", "ee", "finlan...	
uri(iefParameters:schemaExtension:enterprise2.0:user:department)	department	
uri(iefParameters:schemaExtension:enterprise2.0:user:manager)	manager	
roles	Asp(ActiveAppRoleAssignmentsComplex)[peopleAssignments]	
phoneNumberType eq "tac" value	home/telephoneNumber	

Auto show Mapping

☐ View advanced options

- Now navigate to the "Provisioning > Overview" page and click on "Provision on demand" to do a synchronization. Select any user you want to send to the EQS Data Center.

The screenshot shows the Microsoft Azure portal interface for the EQS application. The top navigation bar includes the Microsoft Azure logo, a search bar, and the Copilot icon. The main header shows the path: Home > Enterprise applications | All applications > EQS [redacted] | Overview. Below the header, there are several action buttons: Start provisioning, Stop provisioning, Restart provisioning, Edit provisioning, Provision on demand (highlighted with a red box), and Refresh. The left sidebar contains a list of links: Overview, Provision on demand, Manage, Monitor, and Troubleshoot. The main content area displays the 'Current cycle status' as 'Incremental cycle stopped' with a progress bar at 0% complete. It also shows 'Statistics to date' with links for 'View provisioning details' and 'View technical information'. At the bottom, there is a 'Manage provisioning' section with links for 'Update credentials', 'Edit attribute mappings', 'Add scoping filters', and 'Provision on demand'.

13. Microsoft Entra will show you the outcome of the synchronization.

Perform action



Modified attributes (successful) Data flow

User 'Ada.Lovelace@sijg7.onmicrosoft.com' was created in customappsso

Target attribute name	Source attribute value	Expression	Original target attribute val...	Modified target attribute v...
active	Switch("False", "False", "True", ...	Switch([IsSoftDeleted], "False...		True
displayName	Ada Lovelace	[displayName]		Ada Lovelace
title	Mathematician	[jobTitle]		Mathematician
emails[type eq "work"].value	Ada.Lovelace@eqs.com	[mail]		Ada.Lovelace@eqs.com
userName	Ada.Lovelace@eqs.com	[mail]		Ada.Lovelace@eqs.com
name.givenName	Augusta	[givenName]		Augusta
name.familyName	Lovelace	[surname]		Lovelace
addresses[type eq "work"].cou...	Switch(ToLower("united kingd...	Switch(ToLower([country]), "...		GB
addresses[type eq "home"].str...	Wellington Square OX1 2JD	[streetAddress]		Wellington Square OX1 2JD
addresses[type eq "home"].loc...	Oxford	[city]		Oxford
addresses[type eq "home"].re...	Oxfordshire	[state]		Oxfordshire
addresses[type eq "home"].po...	LN6 7TS	[postalCode]		LN6 7TS
addresses[type eq "home"].co...	Switch(ToLower("united kingd...	Switch(ToLower([country]), "...		GB
urn:ietf:params:scim:schemas:...	178012	[employeeId]		178012
urn:ietf:params:scim:schemas:...	Development	[department]		Development
roles	AssertiveAppRoleAssignments...	AssertiveAppRoleAssignments...		{ "id": "43e29c2f-6fe4-451a-979...
urn:ietf:params:scim:schemas:...	dc86f5c3-838f-4c34-bfa7-a29...	[manager]		a9552699-061a-4fee-9588-c4...

14. Go to the "Provisioning > Overview" page on the Azure portal. Now you can start and stop automated user provisioning. You can still run "Provision on demand" manually at any time.

15. After activating provisioning, all users and groups assigned to the enterprise application will be created, receive invitation links, and appear in the EQS Data Center

The screenshot shows the EQS Data Center interface. At the top, there's a navigation bar with the EQS logo, 'Support Center', and a user profile 'Erika Musterfrau (MyCompany)'. Below this is a 'Data Center' section with tabs for 'Users' (selected), 'Roles & permissions', 'Companies', and 'Activity logs'. The 'Users' tab shows a list of users. Each user entry includes a search bar, a 'Filters' dropdown, and a 'Select' button. The list shows three users, each with a 'pending' status and a 'Resend activation email' button. The interface also includes a 'Sync users from HR system' button and a 'Sort A-Z' dropdown.

3.1.1.2. Role synchronization

To ensure both role assignment and de-assignment work correctly, please configure role mapping as follows:

1. First, because of bugs in Azure SCIM implementation, you must add a feature flag by adding query parameter **aadOptscim062020** to SCIM URL. This is to make de-assignments work.

EQS-CT-SCIM-DEV | Provisioning ...

Save Discard

- Overview (Preview)
- Overview
- Provision on demand
- Manage
- Connectivity (Preview)
- Provisioning**
- Users and groups
- Attribute mapping (Preview)
- Expression builder
- Monitor

Use Microsoft Entra to manage the creation and synchronization of user accounts in EQS-CT-SCIM-DEV based on user and group assignment.

Admin Credentials

Admin Credentials

Microsoft Entra needs the following information to connect to EQS-CT-SCIM-DEV's API and synchronize user data.

Tenant URL * ⓘ

s://pl00562-6.tail4032.ts.net/api/datasync/scim/0599d76e-ad62-4bd8-a34d-226d5cea0dd?aadOptscim062020

Secret Token

.

Test Connection

- Now map roles to **AssertiveAppRoleAssignmentsComplex([appRoleAssignments])**, by adding a new mapping:

Edit Attribute ...

A mapping lets you define how the attributes in one class of Microsoft Entra object (e.g. Users) should flow to and from this application.

Mapping type ⓘ

Expression

Expression ⓘ

AssertiveAppRoleAssignmentsComplex([appRoleAssignments])

The expression was correctly parsed.

Default value if null (optional) ⓘ

[Use the expression builder](#)

Target attribute * ⓘ

roles

Match objects using this attribute

No

Matching precedence ⓘ

Apply this mapping ⓘ

Always

Ok

Resulting into the following:

urn:ietf:params:scim:schemas:extension:enterprise:2.0:User:department	department
urn:ietf:params:scim:schemas:extension:enterprise:2.0:User:manager	manager
roles	AssertiveAppRoleAssignmentsComplex([appRoleAssignments])

[Add New Mapping](#)

- To create Azure Application roles, go to App registrations to find your application and go to App roles to create the desired roles.

EQS SSO Client Management Swisscom | App roles

◊ ◀ ▶
[+ Create app role](#)
[Got feedback?](#)

- Overview
- Quickstart
- Integration assistant
- Diagnose and solve problems
- Manage
 - Branding & properties
 - Authentication
 - Certificates & secrets
 - Token configuration
 - API permissions
 - Expose an API
 - App roles**
 - Owners
 - Roles and administrators
 - Manifest
- Support + Troubleshooting

App roles

App roles are custom roles to assign permissions to users or apps. The application defines and publishes the app roles and interprets them as permissions during authorization.

[How do I assign App roles](#)

Display name	Description	Allowed member types	Value	ID	State
User	User	Users/Groups		18d14569-c3bd-439b-...	Enabled
msiam_access	msiam_access	Users/Groups		b9632174-c057-4f7e-...	Enabled

- Remember that the value must be the same as the Role slug name in EQS Compliance Cockpit Data Center module (see section 2.3 for more information):

Create app role



Display name * ⓘ



Allowed member types * ⓘ

- ☐ Users/Groups
☐ Applications
☒ Both (Users/Groups + Applications)

Value * ⓘ



Description * ⓘ

Do you want to enable this app role? ⓘ



- Now, go to Azure Enterprise Applications to find your application and go to Users and Groups to assign the desired roles:

Overview (Preview) | Overview | Provision on demand | Manage | Connectivity (Preview) | Provisioning | **Users and groups** | Attribute mapping (Preview) | Expression builder

× < + Add user/group **Edit assignment** Remove assignment Update credential Refresh Manage view Got feedback?

The application will appear for assigned users within My Apps. Set 'visible to users?' to no in properties to prevent this.

Assign users and groups to app-roles for your application here. To create new app-roles for this application, use the [application registration](#)

First 200 shown, search all users & groups

	Display name	Object type	Role assigned
☒	ES EQS SSO Client Management Swisscom	Group	User

- Assign the role:

Home > EQS SSO Client Management Swisscom | Users and groups

Edit Assignment ...

EQS Group GmbH

Users and groups

1 group selected.

Select a role

None Selected

Select a role

Only a single role can be selected

Try changing or adding filters if you don't see what you're looking for.

Search

Enter role name to filter items...

4 results found

All

	Name	Type	Details
☐	Compliance Cockpit Admin	App role	EQS Compliance Cockpit Admin role
☒	Compliance Cockpit Employee	App role	Compliance Cockpit Employee role
☐	Control Tower Admin	App role	Control Tower Admin role
☐	User	App role	User

× < + Add user/group Edit assignment Remove assignment Update credential Refresh Manage view

The application will appear for assigned users within My Apps. Set 'visible to users?' to no in properties to prevent this.

Assign users and groups to app-roles for your application here. To create new app-roles for this application, use the [application registration](#)

First 200 shown, search all users & groups

	Display name	Object type	Role assigned
☐	ES EQS SSO Client Management Swisscom	Group	Compliance Cockpit Employee

For various other options you can refer to [Customize user provisioning attribute-mappings in Microsoft Entra](#)

Important Note: if role mapping is enabled, with the above settings the system will de-assign the roles in Compliance Platform that your users do not have assigned via Microsoft Application Roles.

3.1.1.3. Assigning multiple application roles to a user in Azure

Azure/Entra UI typically does not allow you to select multiple roles when assigning them to a user:

Home > EQS SSO Client Management Swisscom | Users and groups

Edit Assignment

EQS Group GmbH

Users and groups

1 group selected.

Select a role

None Selected

Select a role

Only a single role can be selected

Try changing or adding filters if you don't see what you're looking for.

Search

Enter role name to filter items...

4 results found

All

	Name	Type	Details
☐	Compliance Cockpit Admin	App role	EQS Compliance Cockpit Admin role
☒	Compliance Cockpit Employee	App role	Compliance Cockpit Employee role
☒	Control Tower Admin	App role	Control Tower Admin role
☐	User	App role	User

Only 1 item can be selected.

You can work around this limitation by using Microsoft API directly, or **adding same user or group twice**, under different roles:

× « + Add user/group Edit assignment Remove assignment Update credential Refresh Manage view

The application will appear for assigned users within My Apps. Set 'visible to users?' to no in properties to prevent this.

Assign users and groups to app-roles for your application here. To create new app-roles for this application, use the [application registration](#)

First 200 shown, search all users & groups

	Display name	Object type	Role assigned
☐	ES EQS SSO Client Management Swisscom	Group	Compliance Cockpit Employee
☐	ES EQS SSO Client Management Swisscom	Group	Compliance Cockpit Admin

3.1.1.4. Data Testing & Automatic Provisioning

1. Assign a single user or small group of employees that are aware of project implementation to the enterprise application with their desired role.
2. Review the provisioning logs from the identity provider for record errors.
3. Compare the provisioning logs to the Sync Log in EQS and validate that user or group creation is functioning as expected. The sync log allows a downloadable JSON file and viewable JSON payload.

Example Payload

```
{
  "meta": {
    "resourceType": "User"
  },
  "name": {
    "givenName": "Augusta",
    "familyName": "Lovelace"
  },
  "roles": [
    {
      "type": "WindowsAzureActiveDirectoryRole",
      "value": "admin",
      "display": "Admin",
      "primary": false
    }
  ],
  "title": "Mathematician",
  "active": true,
  "emails": [
    {
      "type": "work",
      "value": "Ada.Lovelace@eqs.com",
      "primary": true
    }
  ],
  "schemas": [
    "urn:ietf:params:scim:schemas:core:2.0:User",
    "urn:ietf:params:scim:schemas:extension:enterprise:2.0:User"
  ],
  "userName": "Ada.Lovelace@eqs.com",
  "addresses": [
    {
      "type": "work",
      "region": null,
      "country": "GB",
      "primary": false,
      "locality": null,
      "formatted": null,
      "postalCode": null,
      "streetAddress": null
    }
  ]
}
```

```

},
{
  "type": "home",
  "region": "Oxfordshire",
  "country": "GB",
  "primary": false,
  "locality": "Oxford",
  "formatted": "Oxford",
  "postalCode": "LN6 7TS",
  "streetAddress": "Wellington Square OX1 2JD"
}
],
"displayName": "Ada Lovelace",
"phoneNumbers": [
  {
    "type": "work",
    "value": "3039709867",
    "primary": true
  }
],
"urn:ietf:params:scim:schemas:extension:enterprise:2.0:User": {
  "department": "Development",
  "employeeNumber": "178012 "
}
}

```

SCIM SCIM

🔗 If you need help to configure DataSync, you can download the manual [here](#).

☒ Enable DataSync

Delete DataSync configuration

✓ Save

Connector URL

https://api-compliance.eqscockpit.com/data-center/api/dat...

* Connector name

SCIM

Token

●●●●●●●●●●

Generate new token

Sync log

🔄 Refresh logs

Date	Created users	Modified users	State
2025-07-23T13:55:22+00:00	0	1	Imported
2025-07-23T13:55:22+00:00	0	0	Failed
2025-07-23T13:55:21+00:00	0	0	Failed
2025-07-23T13:40:13+00:00	0	1	Imported
2025-07-23T13:40:13+00:00	0	1	Imported
2025-07-23T13:35:38+00:00	0	1	Imported
2025-07-23T13:35:37+00:00	1	0	Imported
2025-07-23T13:35:37+00:00	0	0	Failed

141-148 of 148 << < > >>

4. Troubleshoot any errors or unexpected results from provisioning.
5. Once data synchronization has been validated and signed off by primary stakeholders all users & groups that need access to the application need to be assigned to the enterprise application with their desired roles.
6. If users need several roles they can be assigned multiple times in the enterprise application under different roles.
7. Enable automatic provisioning in the identity provider

3.2. Inbound JSON API

EQS offers an API to synchronize users between your user directory and the EQS Compliance Platform. The API is HTTP based and accepts user data in the form of JSON objects.

We offer an HTTP endpoint which accepts employee data in the form of JSON objects. This enables easy synchronization of user accounts based on simple HTTP requests.

We offer a HTTP endpoint which accepts JSON payloads with **POST** operation, the same endpoint accepts **form-data payload** to upload a JSON file, as well.

3.2.1 Step-by-Step Process

1. Log into EQS Compliance Cockpit with your user credentials.
2. Click the gear icon on the top-right to open the sidebar settings.
3. Select "DataSync Configuration," then click the "Add DataSync" button to open the connector creation dialog.
4. Make sure the "Inbound JSON API" connector is selected in the "type" dropdown and enter a name for your connector, then click the "Create" button.
5. The Inbound JSON API configuration panel offers to configure the "enabled" state and connector name. It also displays the connection credentials to be used for sending HTTP POST requests to the Inbound JSON API endpoint, namely the connector URL and the token.

6. Please note that, because of security reasons, connector tokens are only displayed once they have been created. You are not able to view the token again, but you are able to generate a new token at any point. When this is done, the old token cannot be used anymore.
7. Continue in the next section of this manual to learn how to communicate with the API.

3.2.2 API Definition & Usage

Requests to the JSON API are made by sending HTTP requests via the POST method to the displayed connector URL. The endpoint accepts both JSON and Form Data payloads. **In case you have more than 500 employees we recommend doing sequential calls with batches of 500 employees.**

HTTP Request URL Query Parameter

URL Query Parameters can be set in the connector URL to customize the behavior of the API. They are appended using a "?" at the end of the URL and separated by "&" .

Query Parameter	Value	Explanation
persist	1(true) 0(false)	Whether or not to persist the changes in the Database. Can be used for testing purposes.

HTTP Request Body

The JSON data transfer object has a single property named "employees" which is a list of employee objects. Each employee object must include the mandatory properties listed on the table below. In addition to the mandatory properties, you can send any combination of the optional properties for each employee object.

A JSON-Schema definition of all employee objects which can be sent to EQS Data Center can be found at this link: <https://api-compliance.eqscockpit.com/data-center/api/datasync/json/schema> .

Attribute (* = required)	Property Path	Content	Example Value
Employee Id (*)	employeeid	String (any) – unique for client personnel number, staff number	178012
Employee state	state	String (ACTIVE / INACTIVE)	ACTIVE
E-mail address (*)	attributes.email	String – e-mail address	mario.rossi@eqs.com
First name (*)	attributes.first_name	String (any)	Mario
Last name (*)	attributes.last_name	String (any)	Rossi

Middle name	attributes.middle_name	String (any)	Giuseppe
Title	attributes.title	String (any)	Mr.
Job	attributes.job	String (any)	Software Engineer
Preferred Language	attributes.preferred_language	The two-character long ISO-3166 ALPHA-2 country code.	EN
Phone	attributes.phone	String	+49123123123
Mobile phone	attributes.mobile_phone	String	+4912312312312
Department	attributes.department	String (any)	Development
Supervisor's employee ID	attributes.supervisor_employee_id	String (any)	175610
Business unit	attributes.business_unit	String (any)	Compliance
Country	attributes.country	String country ISO code 2 letters GB, DE, FR	DE
Tags	attributes.tags	List of String - values	["Berlin", "Subcompany"]
Roles	attributes.roles	List of String - values	["manager", "supervisor"]

Example Payload

```
{
  "employees": [
    {
      "employeeId": "59275422",
      "state": "ACTIVE",
      "attributes": {
        "first_name": "Ada",
        "last_name": "Lovelace",
        "email": "ada.lovelace@tech.engineer",
        "job": "Mathematician",
        "department": "R&D",
        "supervisor_employee_id": "00000001",
        "tags": [
          "Engineering"
        ],
        "business_unit": "R&D",
        "country": "UK"
      }
    }
  ]
}
```

HTTP Request with JSON payload

```
curl '{host}/data-center/api/datasync/json/{connector_uuid}?persist=1' -X POST -H 'Authorization: Bearer {Bearer Token}' -H 'Content-Type: application/json' -d @{json_file}
```

HTTP Request with JSON form-data

The same JSON payload can be sent as a file via form-data. To convey it we provide an example using curl command line:

```
curl '{host}/data-center/api/datasync/json/{connector_uuid}?persist=1' -X POST -H 'Authorization: Bearer {Bearer Token}' --form 'file=@{json_file};type=application/json'
```

3.3. Outbound JSON API

EQS also offers an API specification to be implemented at customer's side to synchronize users between customer's user directory and the EQS Compliance Platform. The API is HTTP based and accepts user data in the form of JSON objects.

We offer an API definition which should offer an HTTP endpoint which offers JSON response payloads with **GET** operation.

3.3.1 Step-by-Step Process

1. Log into EQS Compliance Cockpit with your user credentials.
2. Click the gear icon on the top-right to open the sidebar settings.
3. Select "DataSync Configuration," then click the "Add DataSync" button to open the connector creation dialog.
4. Make sure the "Outbound JSON API" connector is selected in the "type" dropdown and enter a name for your connector, then click the "Create" button.

Create DataSync Connector

×

Select connector (required)

Outbound JSON API

▼

* Connector name (required)

Outbound JSON API

* Contact email

tester@eqs.com

* URL

https://[REDACTED]/api/v1/employees

* Header

client_id=4[REDACTED]5&client_secret=E6[REDACTED]9

× Cancel

✓ Create

5. A new connector configuration panel is shown in the "DataSync Configuration" section. It displays the connection configuration as well specifics like the custom Filter to be defined by the API client.

Outbound JSON API Outbound JSON API

🔗 If you need help to configure DataSync, you can download the manual [here](#).

☒ Enable DataSync

Delete DataSync configuration

✓ Save

* Connector name

Outbound JSON API

* Contact email

tester@eqs.com

* Header

client_id=4[REDACTED]5&client_secret=E[REDACTED]9

* Url

https://[REDACTED]api/v1/employees

Filter

Filter...

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Outbound JSON API. Manual runs are only possible for active and completed connectors

Test connection

Run manual datasync

6. A Test connection button is available to test the configuration.

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the FTP. Manual runs are only possible for active and completed connectors.

Test connection

Run manual datasync

✓ Connection established successfully.

7. Now we must define the frequency for which the provisioning will be executed. For that we have the Data Sync panel with all executed synchronizations, manual or automatic. (don't forget to save using the top right button in the panel)

Data Sync

* Interval

Daily

* Start time

🕒 01:00

🔗 Based on your routine connection the sync will happen at 01:00 Daily

Sync log

No Results

8. Once done, now we can enable Data Synchronization with this toggle (don't forget to save using the top right button in the panel):

Outbound JSON API Outbound JSON API

❗ If you need help to configure DataSync, you can download the manual [here](#).

☒ Enable DataSync

Delete DataSync configuration

✓ Save

- Once the Data Synchronization is enabled the automatic data synchronization will take place in the next opportunity. A manual trigger of the synchronization is also available.

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Microsoft Graph API. Manual runs are only possible for active and completed connectors

Test connection

Run manual datasync

Continue in the next section of this manual to learn how to build your API per EQS Definition.

3.3.2 API Definition

Requests to the Outbound JSON API are made by sending HTTP requests via the GET method to the configured URL. The endpoint should use JSON as response payload. For credentials the API should implement Header Params with *client_id* and *client_secret*.

HTTP Request URL Query Parameters

Here are the URL Query Parameters to be implemented in the connector URL of the API. They are appended using a "?" at the end of the URL and separated by "&".

Type	Query Parameter	Value	Explanation	Usage
Standard	offset	Integer (i.e.: 0)	This parameter defines from which index to start the API call; this value will be returned as currentIndex attribute in the response payload.	offset=0
Custom	String (i.e.: subsidiary)	String (i.e.: Company ABC)	This is not mandatory, but if the customer intends to add custom filters.	subsidiary=Company ABC (value to be configured in the Filter attribute in DataSync Connector configuration)

HTTP Response Body

The JSON data transfer object has a single property named "employees" which is a list of employee objects. Each employee object must include the mandatory properties listed on the table below. In addition to the mandatory properties, you can send any combination of the optional properties for each employee object.

Example Payload

```
{
  "employees": [
    {
      "employeeId": "59275422",
      "state": "ACTIVE",
      "attributes": {
        "first_name": "Ada",
        "last_name": "Lovelace",
        "email": "ada.lovelace@tech.engineer",
        "job": "Mathematician",
        "department": "R&D",
        "supervisor_employee_id": "00000001",
        "tags": [
          "Engineering"
        ],
        "business_unit": "R&D",
        "country": "UK"
      }
    }
  ],
  "currentIndex": 0,
  "nextIndex": 20,
  "total": 120
}
```

Be aware of the importance to implement **currentIndex**, **nextIndex** and **total** attributes in the response payload, this will help to do pagination.

A JSON-Schema definition of all employee objects which can be sent to EQS Data Center can be found at this link: <https://api-compliance.eqscockpit.com/data-center/api/datasync/json/schema> .

Attribute (* = required)	Property Path	Content	Example Value
Employee Id (*)	employeeid	String (any) – unique for client personnel number, staff number	178012
Employee state	state	String (ACTIVE / INACTIVE)	ACTIVE
E-mail address (*)	attributes.email	String – e-mail address	mario.rossi@eqs.com
First name (*)	attributes.first_name	String (any)	Mario
Last name (*)	attributes.last_name	String (any)	Rossi
Middle name	attributes.middle_name	String (any)	Giuseppe
Title	attributes.title	String (any)	Mr.
Job	attributes.job	String (any)	Software Engineer
Preferred Language	attributes.preferred_language	The two- character long ISO-3166 ALPHA-2 country code.	EN
Phone	attributes.phone	String	+49123123123
Mobile phone	attributes.mobile_phone	String	+4912312312312
Department	attributes.department	String (any)	Development
Supervisor's employee ID	attributes.supervisor_employee_id	String (any)	175610

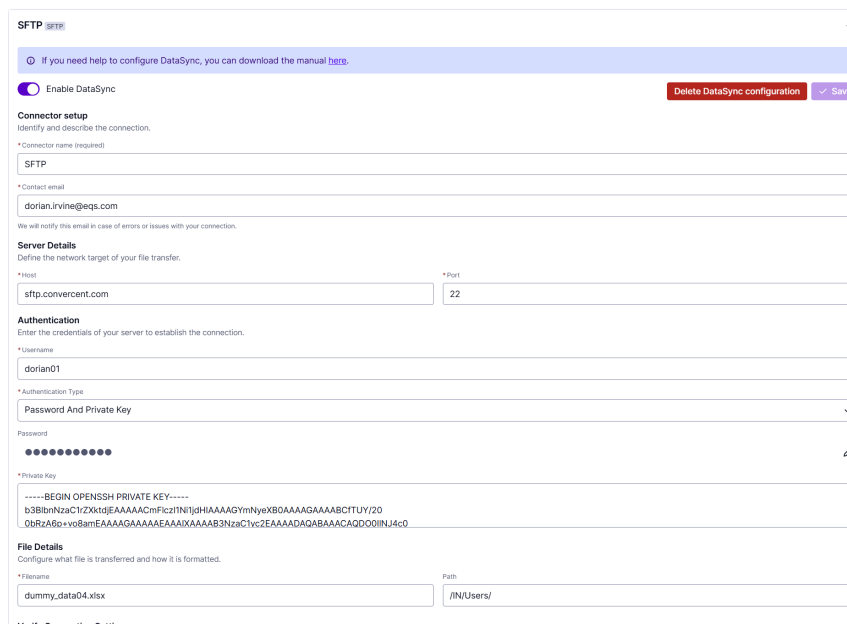
Business unit	attributes.business_unit	String (any)	Compliance
Country	attributes.country	String country ISO code 2 letters GB, DE, FR	DE
Tags	attributes.tags	List of String - values	["Berlin", "Subcompany"]
Roles	attributes.roles	List of String - values	["manager", "supervisor"]

3.4. SFTP

SFTP is supported by DataSync as one option to synchronize users between your user directory and the EQS Compliance Platform

3.4.1 Step-by-Step Process

1. Log into EQS Compliance Cockpit with your user credentials.
2. Click the gear icon on the top-right to open the sidebar settings.
3. Select "DataSync Configuration," then click the "Add DataSync" button to open the connector creation dialog.
4. Make sure the "SFTP" connector is selected in the dropdown and enter a name for your connector with the connection configuration, then click the "Create" button.



5. A new connector configuration panel is shown in the "DataSync Configuration" section. It displays connection configuration as well specifics like the file name and type. Authentication types that are supported are username and password or username and SSH private keys. Be sure to add the file under a folder and to add a "slash" (/) before and after the folder name in the Path input. The connector is disabled by default, which means EQS Data Center will not execute the Automatic Sync.
6. A Test connection button is available to test the configuration.

Verify Connection Settings

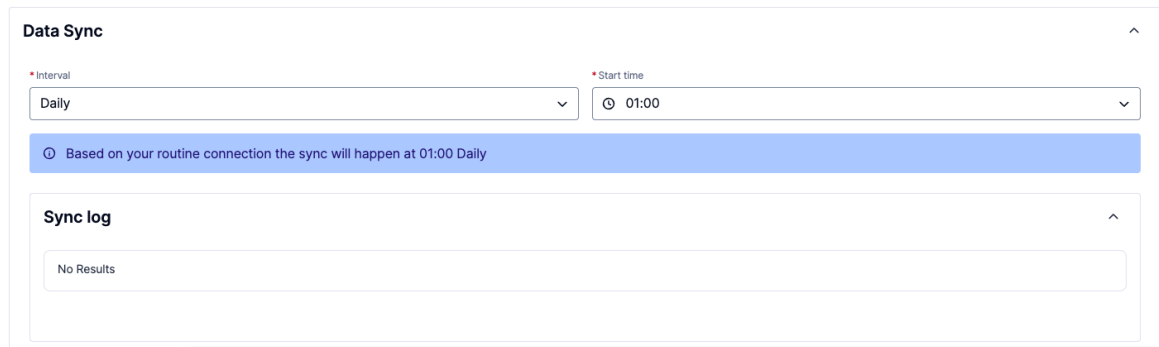
You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the FTP. Manual runs are only possible for active and completed connectors.

Test connection Run manual datasync

✓ Connection established successfully.

7. Now we must define the frequency for which the provisioning will be executed. For that we have the Data Sync panel with all executed synchronizations, manual or automatic. (don't forget to

save using the top right button in the panel)



Data Sync

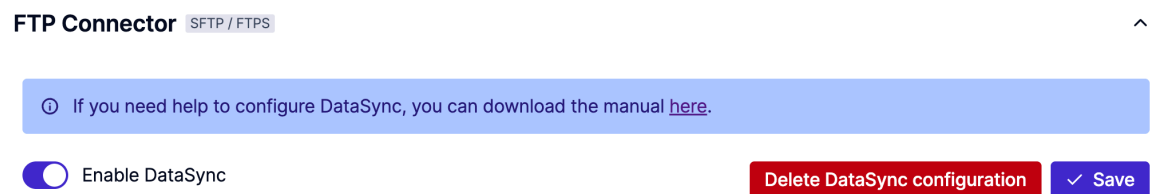
* Interval: * Start time:

ⓘ Based on your routine connection the sync will happen at 01:00 Daily

Sync log

No Results

- Once done, now we can enable Data Synchronization with this toggle (don't forget to save using the top right button in the panel):



FTP Connector SFTP / FTPS

ⓘ If you need help to configure DataSync, you can download the manual [here](#).

☒ Enable DataSync Delete DataSync configuration ✓ Save

- Once the Data Synchronization is enabled the automatic data synchronization will take place in the next opportunity. A manual trigger of the synchronization is also available.

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Microsoft Graph API. Manual runs are only possible for active and completed connectors



3.4.1.1. JSON File Structure

The JSON data transfer object has a single property named "employees" which is a list of employee objects. Each employee object must include the mandatory properties listed on the table below. In addition to the mandatory properties, you can send any combination of the optional properties for each employee object.

A JSON-Schema definition of all employee objects which can be sent to EQS Data Center can be found at this link: <https://api-compliance.eqscockpit.com/data-center/api/datasync/json/schema>.

Attribute (* = required)	Property Path	Content	Example Value
Employee Id (*)	employeeid	String (any) – unique for client personnel number, staff number	178012
Employee state	state	String (ACTIVE / INACTIVE)	ACTIVE
E-mail address (*)	attributes.email	String – e-mail address	mario.rossi@eqs.com
First name (*)	attributes.first_name	String (any)	Mario
Last name (*)	attributes.last_name	String (any)	Rossi
Middle name	attributes.middle_name	String (any)	Giuseppe
Title	attributes.title	String (any)	Mr.
Job	attributes.job	String (any)	Software Engineer
Preferred Language	attributes.preferred_language	The two- character long ISO-3166 ALPHA-2 country code.	EN
Phone	attributes.phone	String	+49123123123
Mobile phone	attributes.mobile_phone	String	+4912312312312
Department	attributes.department	String (any)	Development
Supervisor's employee ID	attributes.supervisor_employee_ id	String (any)	175610

Business unit	attributes.business_unit	String (any)	Compliance
Country	attributes.country	String country ISO code 2 letters GB, DE, FR	DE
Tags	attributes.tags	List of String - values	["Berlin", "Subcompany"]
Roles	attributes.roles	List of String - values	["manager", "supervisor"]

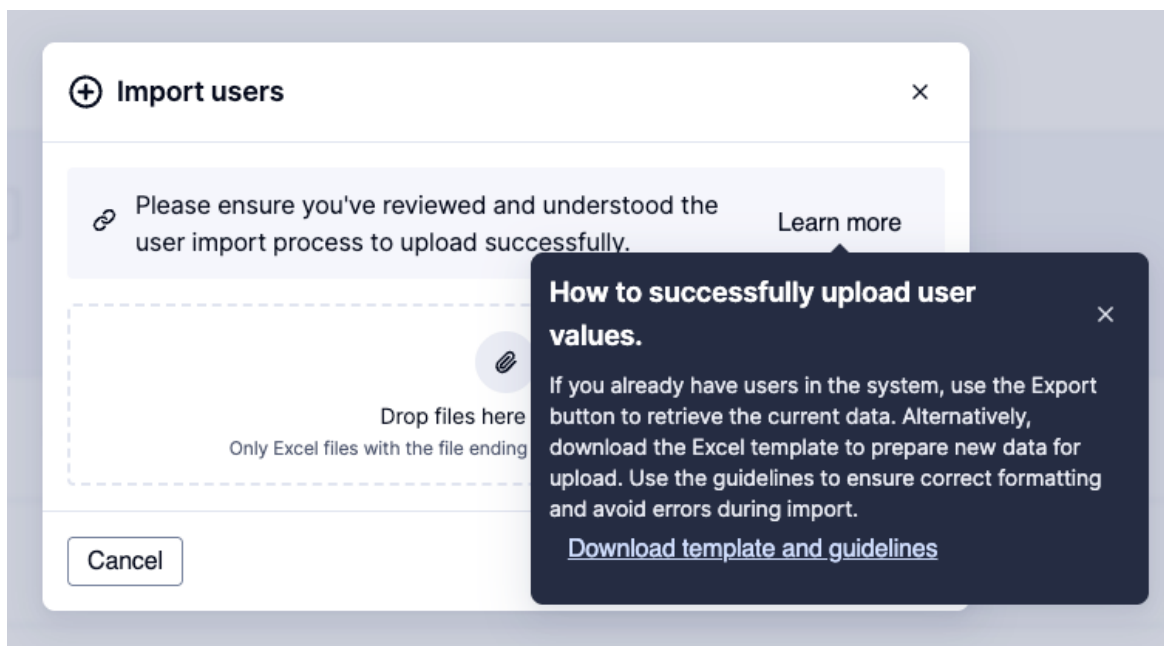
Example Payload

```
{
  "employees": [
    {
      "employeeId": "59275422",
      "state": "ACTIVE",
      "attributes": {
        "first_name": "Ada",
        "last_name": "Lovelace",
        "email": "ada.lovelace@tech.engineer",
        "job": "Mathematician",
        "department": "R&D",
        "supervisor_employee_id": "00000001",
        "tags": [
          "Engineering"
        ],
        "business_unit": "R&D",
        "country": "UK"
      }
    }
  ]
}
```

3.4.1.2. XLSX File Structure

Excel file in the XLSX format is also supported.

A Guideline with examples and template can be found to download in Compliance Cockpit when clicking on Import Users:



3.4.1.3. Custom Attributes

Custom Attributes are available for XLSX file types. These attributes must be created in Data Center before they are added to the template.

User attributes	
Default 12	
Custom 7	
Name	Format
Custom	No specific format
Employment	No specific format
HR Business Partner	No specific format
ManagesPeople	No specific format
Entity	No specific format

This allows organizations to define and manage their own user profile fields—going beyond the system-defined Default User Attributes currently supported on our platform.

Attribute types that are supported for CUA are the following:

- String Text
- Numerical
- Date (DD/MM/YYYY)

3.5. Microsoft Graph

Microsoft Graph is supported by DataSync as one option to synchronize users between your user directory and the EQS Compliance Platform.

3.5.1 Microsoft Entra

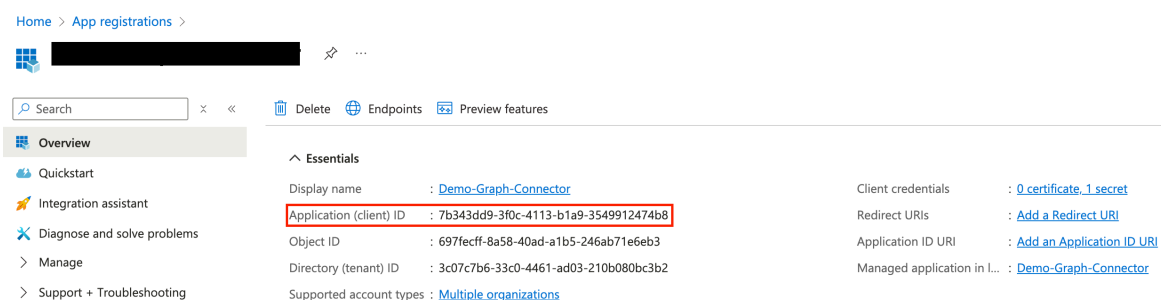
In this section we are going to set up DataSync with **Microsoft Graph**, which usually uses Microsoft's Entra data, Microsoft's identity lifecycle management.

This is done via the following steps:

1. Configure an enterprise application in your Azure portal at <https://portal.azure.com>.
2. Configuring the Microsoft Graph credentials.
3. Create a new Microsoft Graph connector in the settings of the EQS Compliance Cockpit.
4. Start provisioning via the EQS Compliance Platform.

3.5.1.1. Step-by-Step Process

1. Open <https://portal.azure.com> and find your registered application under App registrations, your IT department may want to create a new one. The registered application has most of the information needed to set up the provisioning via MS Graph. Once you have your enterprise application open, you can copy the Client ID.



2. Go to Manage->Certificates & secrets and create a password, then you can copy the Client Secret.

Certificates & secrets

Search Got feedback?

Overview
Quickstart
Integration assistant
Diagnose and solve problems
Manage
Branding & properties
Authentication
Certificates & secrets
Token configuration
API permissions
Expose an API
App roles
Owners

Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

Application registration certificates, secrets and federated credentials can be found in the tabs below.

Certificates (0) **Client secrets (1)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

Description	Expires	Value	Secret ID
test	9/3/2025	PA1*****	786102fe-5727-46a4-9ae7-584adc882ef4

- Go to Manage->API permissions and add the permission User.Read.All of type "Application". If you intend to use a GroupId to filter out specific users of a group from your organisation you need to add the GroupMember.Read.All permission as well.

API permissions

Search Refresh Got feedback?

Overview
Quickstart
Integration assistant
Diagnose and solve problems
Manage
Branding & properties
Authentication
Certificates & secrets
Token configuration
API permissions
Expose an API
App roles

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for sjig7

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (3)				
GroupMember.Read.All	Application	Read all group memberships	Yes	Granted for sjig7
User.Read	Delegated	Sign in and read user profile	No	Granted for sjig7
User.Read.All	Application	Read all users' full profiles	Yes	Granted for sjig7

To view and manage consented permissions for individual apps, as well as your tenant's consent settings, try [Enterprise applications](#).

- To find your Tenant, go to Microsoft Entra. Once you have it open, you can copy the Tenant (Primary domain). So, we are done with Azure part.

Overview

Home > Overview

Overview
Preview features
Diagnose and solve problems
Manage
Monitoring
Troubleshooting + Support

Microsoft Entra has a simpler, integrated experience for managing all your Identity and Access Management needs. Try the new Microsoft Entra admin center!

Overview Monitoring Properties Recommendations Setup guides

Search your tenant

Basic information

Name	sjig7	Users	8
Tenant ID	3c07c7b6-33c0-4461-ad03-210b080bc3b2	Groups	190
Primary domain	sjig7.onmicrosoft.com	Applications	20
License	Microsoft Entra ID P2	Devices	6

Alerts

- Log into EQS Compliance Cockpit with your user credentials.
- Click the gear icon on the top-right to open the sidebar settings.
- Select "DataSync Configuration," then click the "Add DataSync" button to open the connector creation dialog.

8. Make sure the "Microsoft Graph" connector is selected in the dropdown and enter a name for your connector with the connection configuration, then click the "Create" button.

Create DataSync Connector ×

Select connector (required)

Microsoft Graph ▼

* Connector name (required)

Microsoft Graph Connector

* Contact email

tester@eqs.com

* Client ID

7b343dd9-3f0c-4113 [REDACTED]

* Client Secret

PA18Q~YT~AXeZKx_VFyVoW [REDACTED]

* Tenant

sjjg7.onmicrosoft.com

× Cancel ✓ Create

9. A new connector configuration panel is shown in the "DataSync Configuration" section. It displays the connection configuration as well specific Microsoft Graph API input fields, more about it in the subsection below. The connector is disabled by default, which means EQS Data Center will not execute the Automatic Sync, you will experience more about it in short.

Microsoft Graph Connector Microsoft Graph API

📘 If you need help to configure DataSync, you can download the manual [here](#).

☐ Enable DataSync

Delete DataSync configuration

✓ Save

* Connector name	* Contact email
Microsoft Graph Connector	tester@eqs.com
* Client ID	Client Secret
7b343dd9-3f0c-4113-b1a9-3549912474b8	•••••••••• 
* Tenant	
sjjg7.onmicrosoft.com	
Group ID	
Group ID...	
Select	
Select...	
Filter	
Filter...	
Expand	
Expand...	

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Microsoft Graph API. Manual runs are only possible for active and completed connectors

Test connection

Run manual datasync

📘 Please complete the attribute mapping to finalize the connector setup. All required fields must be filled out.

Map from attribute...	... to DataCenter attribute...
Imported value	attributes.email
Imported value	attributes.last_name
Imported value	employeeid
Imported value	attributes.first_name
Map from attribute...	... to DataCenter attribute...

⚠ The following DataCenter attributes are required but missing in the mapping. Please make sure there is one mapping to the following attribute(s): "attributes.email" "attributes.last_name" "employeeid" "attributes.first_name"

Data Sync

* Interval * Start time

📘 Based on your routine connection the sync will happen at 01:00 Daily

Sync log

No Results

10. A Test connection button is available to test the configuration, with a Payload Response for a short check. Every time you change the configuration parameters, Group ID, Select, Filter and Expand, this output will change and populate the possible values in the mapping section. For more information on these parameters, see Microsoft's article on [Use query parameters to customize responses](#).

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Microsoft Graph API. Manual runs are only possible for active and completed connectors

Test connection

✓ Connection established successfully.

Remote response body

```
{
  "@odata.context": "https://graph.microsoft.com/v1.0/$metadata#users",
  "value": [
    {
      "businessPhones": [],
      "displayName": "Balaji Lakkusamy",

```

11. Now we need to configure the attribute mapping, so which user information you want to send to the EQS Data Center for each user. The required attributes are EmployeeID, Email, First Name and Last Name. You can find a list of available EQS Data Center attributes in section 2.2. (don't forget to save using the top right button in the panel)

Please complete the attribute mapping to finalize the connector setup. All required fields must be filled out.

Map from attribute...	... to DataCenter attribute...
mail	attributes.email
surname	attributes.last_name
id	employeeid
givenName	attributes.first_name
jobTitle	attributes.job

Map from attribute... ... to DataCenter attribute...

12. We also must define the frequency at which the provisioning will be executed, for that we have the Data Sync panel with all executed synchronizations, manual or automatic. (don't forget to save using the top right button in the panel)

Data Sync

* Interval: Daily

* Start time: 01:00

Based on your routine connection the sync will happen at 01:00 Daily

Sync log

No Results

13. Once done, now we can enable the Data Synchronization with this toggle (don't forget to save using the top right button in the panel):

Microsoft Graph Connector Microsoft Graph API

🔗 If you need help to configure DataSync, you can download the manual [here](#).

☒ Enable DataSync

Delete DataSync configuration

✓ Save

* Connector name

Microsoft Graph Connector

* Contact email

tester@eqs.com

- Once the Data Synchronization is enabled the automatic data synchronization will take place in the next opportunity. A manual trigger of the synchronization is also available.

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Microsoft Graph API. Manual runs are only possible for active and completed connectors

Test connection

Run manual datasync

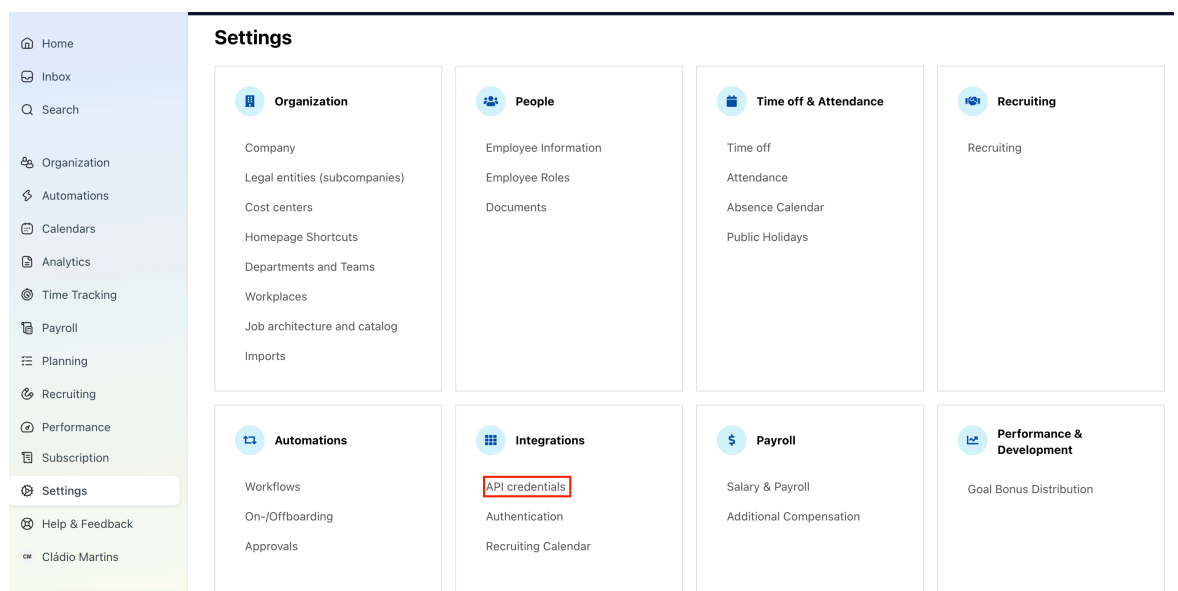
3.6. Personio

Personio is supported by DataSync as one option to synchronize users between your Personio directory and the EQS Compliance Platform.

3.6.1 Step-by-Step Process

In this section we are going to set up DataSync with **Personio**:

1. Log in to Personio and go to Settings->Integrations->API Credentials.



2. Create a new custom integration:

Connected integrations

Monitor and manage your integrations

Create custom integration

Integration	Activated by	Activated on	Status	Action
-------------	--------------	--------------	--------	--------

3. In the creation process add the following rights:

Create a custom integration

1

Enter integration info

2

Configure access rights

3

View credentials

Select the attributes you want to grant access rights for.

Employees	☒	Read	☐	Write
Attendances	☐	Read	☐	Write
Time Off	☐	Read	☐	Write
Documents	☐	Read	☐	Write
Custom Reports	☐	Read	☐	Write
Compensations	☐	Read	☐	Write
Recruiting	☐	Read	☐	Write
Webhooks	☐	Read	☐	Write
Org Units	☐	Read	☐	Write
Legal Entities	☐	Read	☐	Write

Readable employee attributes

This integration might require custom attributes. [Learn more](#)

Choose attributes

Back

Create integration

4. And define which attributes you want to be read by EQS Compliance Platform. Remember the minimum Data Center required attributes, see Section 2.2. Once you are done click on **Create integration**.

Search

☐

Select all

☒

First name (legal)

☒

Last name (legal)

☒

Email

☒

Employee ID

☐

Name (preferred)

☐

Gender

Choose attributes · 4

- Once the integration is created, the API Credentials will be provided, copy them in a save place to be used in the next step.

Create a custom integration ×

✓ Enter integration info

The API credentials below can be used to access sensitive employee data, please treat them with care and store them in a safe place.

✓ Configure access rights

3 View credentials

Your client ID

papi-710a8cae-52e0-4a67-a653-bf933d41901a

Copy client ID

Your API secret

.....

Copy secret

⚠ For the security of this sensitive information, please ensure that you store this API secret in a secure place.

📘 Please note that you will need to reconfigure your integration by replacing the old API secret with the new one.

Finish

6. Log into EQS Compliance Cockpit with your user credentials.
7. Click the gear icon on the top-right to open the sidebar settings.
8. Select "DataSync Configuration," then click the "Add DataSync" button to open the connector creation dialog.
9. Make sure the "Personio" connector is selected in the dropdown and enter a name for your connector with the connection configuration, then click the "Create" button.

Create DataSync Connector ×

Select connector (required)

Personio ▼

* Connector name (required)

Personio Connector

* Contact email

tester@eqs.com

* Client ID

papi-8876a6ac- XXXXXXXXXX bc

* Client Secret

-pn8Q~xa2yt XXXXXXXXXX 6FMdeJ

× Cancel
✓ Create

10. A new connector configuration panel is shown in the "DataSync Configuration" section, displaying configuration settings. The connector is disabled by default, which means EQS Data Center will not execute the Automatic Sync, you will experience more about it in short.

Personio Connector Personio ^

🔗 If you need help to configure DataSync, you can download the manual [here](#).

☐ Enable DataSync Delete DataSync configuration ✓ Save

* Connector name

Personio Connector

* Contact email

tester@eqs.com

* Client ID

papi-33f9e1de-f255-4562-90c6-f52eb5d2867f

Client Secret

●●●●●●●●●●
✎

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Personio API. Manual runs are only possible for active and completed connectors

Test connection
Run manual datasync

🔗 Please complete the attribute mapping to finalize the connector setup. All required fields must be filled out. ×

Map from attribute...	... to DataCenter attribute...	
Imported value ▼	attributes.email	🗑
Imported value ▼	attributes.last_name	🗑
Imported value ▼	employeeid	🗑
Imported value ▼	attributes.first_name	🗑

11. A Test connection button is available to test the configuration, with a Payload Response for a short check.

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Personio API. Manual runs are only possible for active and completed connectors

✓ Connection established successfully.

```
{
  "employments": [
    {
      "id": "df4d5644-d576-4f47-8837-ecf4b3faa0e9"
    }
  ],
  "first_name": "Cláudio",
  "id": "30192290",
  "last_name": "Martins",
  "status": "ACTIVE"
}
```

12. Now we need to configure the attribute mapping, so which user information you want to send to the EQS Data Center for each user. The required attributes are EmployeeID, Email, First Name and Last Name. You can find a list of available EQS Data Center attributes in section 2.2. (don't forget to save using the top right button in the panel)

Map from attribute...	... to DataCenter attribute...
email	attributes.email
last_name	attributes.last_name
id	employeeid
first_name	attributes.first_name

13. We also must define the frequency at which the provisioning will be executed, for that we have the Data Sync panel with all executed synchronizations, manual or automatic. (don't forget to save using the top right button in the panel)

Data Sync

Interval
Daily

Start time
01:00

Based on your routine connection the sync will happen at 01:00 Daily

Sync log

No Results

14. Once done, now we can enable the Data Synchronization with this toggle (don't forget to save using the top right button in the panel):

Personio Connector Personio ^

① If you need help to configure DataSync, you can download the manual [here](#).

☒ Enable DataSync Delete DataSync configuration ✓ Save

15. Once the Data Synchronization is enabled the automatic data synchronization will take place in the next opportunity. A manual trigger of the synchronization is also available.

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Microsoft Graph API. Manual runs are only possible for active and completed connectors

Test connection Run manual datasync

3.7. SAP Success Factors

SAP Success Factors is supported by DataSync as one option to synchronize users between your SAP directory and the EQS Compliance Platform.

3.7.1 Step-by-Step Process

In this section we are going to set up DataSync with **SAP Success Factors**:

1. Log into EQS Compliance Cockpit with your user credentials.
2. Click the gear icon on the top-right to open the sidebar settings.
3. Select "DataSync Configuration," then click the "Add DataSync" button to open the connector creation dialog.
4. Make sure the "SAP Success Factors" connector is selected in the dropdown and enter a name for your connector with the connection configuration, then click the "Create" button.

Create DataSync Connector ×

Select connector (required)

SAP Success Factors ▼

* Connector name (required)

SAP Success Factors Connector

* Contact email

tester@eqs.com

* Token URL

* Client ID

* Private Key

* User ID

* Company ID

× Cancel ✓ Create

5. A new connector configuration panel is shown in the "DataSync Configuration" section, displaying configuration settings. The connector is disabled by default, which means EQS Data Center will not execute the Automatic Sync, you will experience more about it in short.

SAP Success Factors Connector

SAP Success Factors

If you need help to configure DataSync, you can download the manual [here](#).

Enable DataSync

Delete DataSync configuration

Save

Connector name

SAP Success Factors Connector

Contact email

@eqs.com

Client ID

Private Key

User ID

tech_eqs

Company ID

Token URL

https://api2.successfactors.eu

Select

Select...

Filter

Filter...

Expand

Expand...

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the SAP Success Factors. Manual runs are only possible for active and completed connectors.

Test connection

Run manual datasync

Map from attribute...

... to DataCenter attribute...

lastName

attributes.last_name

email

attributes.email

firstName

attributes.first_name

empld

employeeid

6. A Test connection button is available to test the configuration, with a Payload Response for a short check.

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the SAP Success Factors. Manual runs are only possible for active and completed connectors.

✓ Connection established successfully.

```
"results": [
  {
    "__metadata": {
      "uri": "https://api2.successfactors.eu/odata/v2/User('0120')",
      "type": "SFOData.User"
    },
    "division": "N/A",
    "empld": "0120",
```

7. Now we need to configure the attribute mapping, so which user information you want to send to the EQS Data Center for each user. The required attributes are EmployeeID, Email, First Name and Last Name. You can find a list of available EQS Data Center attributes in section 2.2. (don't forget to save using the top right button in the panel)

Map from attribute...	... to DataCenter attribute...	
lastName	attributes.last_name	
email	attributes.email	
firstName	attributes.first_name	
empld	employeeid	

8. We also must define the frequency at which the provisioning will be executed, for that we have the Data Sync panel with all executed synchronizations, manual or automatic. (don't forget to save using the top right button in the panel)

Data Sync

Interval
Daily

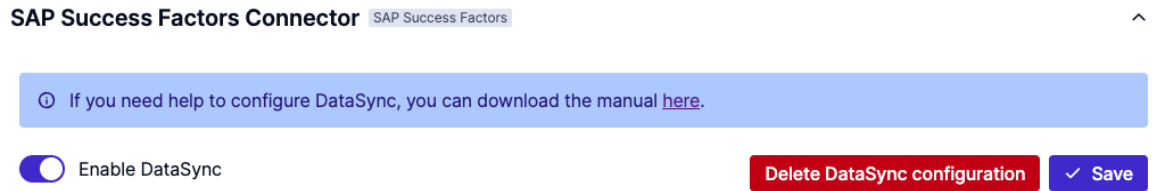
Start time
01:00

Based on your routine connection the sync will happen at 01:00 Daily

Sync log

No Results

9. Once done, now we can enable the Data Synchronization with this toggle (don't forget to save using the top right button in the panel):



10. Once the Data Synchronization is enabled the automatic data synchronization will take place in the next opportunity. A manual trigger of the synchronization is also available.

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Microsoft Graph API. Manual runs are only possible for active and completed connectors



3.8. Planerio

Planerio is supported by DataSync as one option to synchronize users between your Planerio directory and the EQS Compliance Platform.

3.8.1 Step-by-Step Process

In this section we are going to set up DataSync with **Planerio**:

1. Log into EQS Compliance Cockpit with your user credentials.
2. Click the gear icon on the top-right to open the sidebar settings.
3. Select "DataSync Configuration," then click the "Add DataSync" button to open the connector creation dialog.
4. Make sure the "Planerio" connector is selected in the dropdown and enter a name for your connector with the connection configuration, then click the "Create" button.

Create DataSync Connector ×

Select connector (required)

Planerio ▼

* Connector name (required)

Planerio Connector

* Contact email

tester@eqs.com

* Username

O [REDACTED] 68

* Password

[REDACTED]

* URL

[REDACTED]

* Group Token

c [REDACTED] 2

× Cancel ✓ Create

5. A new connector configuration panel is shown in the "DataSync Configuration" section, displaying configuration settings. The connector is disabled by default, which means EQS Data Center will not execute the Automatic Sync, you will experience more about it in short.

Planerio Connector Planerio

📘 If you need help to configure DataSync, you can download the manual [here](#).

☐ Enable DataSync Delete DataSync configuration ✓ Save

* Connector name * Contact email

* Username Password

* URL

* Group Token

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Planerio API. Manual runs are only possible for active and completed connectors

Test connection Run manual datasync

Map from attribute...	... to DataCenter attribute...	
email	attributes.email	
last_name	attributes.last_name	
employee_uuid	employeeid	
first_name	attributes.first_name	

6. A Test connection button is available to test the configuration, with a Payload Response for a short check.

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Planerio API. Manual runs are only possible for active and completed connectors

Test connection Run manual datasync

✓ Connection established successfully.

Remote response body

```
[
  {
    "employee_uuid": "d57[REDACTED]ebd",
    "external_unique_id": null,
    "first_name": "[REDACTED]",
    "last_name": "[REDACTED]"
  }
]
```

7. Now we need to configure the attribute mapping, so which user information do you want to send to the EQS Data Center for each user. The required attributes are EmployeeID, Email,

First Name and Last Name. You can find a list of available EQS Data Center attributes in section 2.2. (don't forget to save using the top right button in the panel)

Map from attribute...	... to DataCenter attribute...	
lastName	attributes.last_name	
email	attributes.email	
firstName	attributes.first_name	
emplid	employeeid	

- We also must define the frequency at which the provisioning will be executed, for that we have the Data Sync panel with all executed synchronizations, manual or automatic. (don't forget to save using the top right button in the panel)

Data Sync

Interval

Daily

Start time

01:00

Based on your routine connection the sync will happen at 01:00 Daily

Sync log

No Results

- Once done, now we can enable Data Synchronization with this toggle (don't forget to save using the top right button in the panel):

Planerio Connector

If you need help to configure DataSync, you can download the manual [here](#).

☒ Enable DataSync

Delete DataSync configuration

Save

- Once the Data Synchronization is enabled the automatic data synchronization will take place in the next opportunity. A manual trigger of the synchronization is also available.

Verify Connection Settings

You can validate the entered connection data before saving the connection. Clicking the button is going to initiate a request between our DataSync service and the Microsoft Graph API. Manual runs are only possible for active and completed connectors

Test connection
Run manual datasync

4. Frequently Asked Questions

Welcome to our Frequently Asked Questions (FAQ) section. Here, you'll find answers to some of the most common inquiries about DataSync and User Provisioning. If you don't find what you're looking for, feel free to reach out to our customer support team for further assistance.

Is it possible to have Just-In-Time provisioning via SSO?

No, we do not offer this capability.

Can a client in Demo Status test/configure DataSync?

Yes, just be aware that depending on your License configuration, employees may receive e-mails when a Provisioning happens.

Can user e-mails have multiple different domains?

Yes.

Does EQS host their own SFTP server?

No. Clients are responsible for hosting and configuring their own server.

Does the system perform full delete and insert or delta transformations for import?

Delta transformations.

Are custom user attributes supported?

Yes. Custom User Attributes (CUAs) are currently supported by SFTP and manual bulk import. Support for CUAs via SCIM will be available in near future.