

User Sync Guide

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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).
 - Microsoft: User account with Application Administrator or Global Administrator Privileges
- **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 or weekly based on subscription level. 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.

How does Recognize know who to add, update, or remove?

Recognize uses an internal Microsoft Graph ID as the unique identifier to match up users. When we sync for the first time, this information is populated. On subsequent syncs, users are matched up based on the Microsoft Graph ID. If a new ID is detected, the user is created. If a user with a given ID is no longer found in the sync configuration, that user will be disabled.

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)
- department (optional)
- country (optional)

Custom Fields

Recognize has the ability to sync in up to 9 custom fields. Microsoft refers to custom fields as "Schema Extensions". You can read more here: <https://docs.microsoft.com/en-us/graph/extendability-overview>. If you would like to sync custom fields into Recognize, please contact support@recognizeapp.com or your customer success manager.

Service Accounts

It is a common practice to use service accounts to setup the consent and authentication flows. This way the connection is not tied to an individual user. Please see Appendix A for more information about setting up a Service Account for use with User Sync.

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' dashboard with a sidebar menu on the left containing: Company Dashboard, Dashboard, Custom Badges, Rewards, Nominations, Roles, Anniversaries, Accounts, Top Employees, Recognitions, Comments, and Settings (highlighted). The main content area is titled 'User Sync' and includes a toggle switch for 'Sync Enabled' (currently OFF), a dropdown menu for 'Choose sync provider' set to 'Yammer', and a blue button labeled 'Authenticate with Yammer'. Below this is a warning: 'You must authenticate with Yammer and be an administrator with Yammer in order to edit the groups that will be synced.' The 'Recognition sending limits' section explains how to limit badge counts, with 'Default' and 'Global' settings both set to 10 and 'Daily'. A 'Save badge limits' button is at the bottom.

Allow permission for Recognize to access your Yammer account

The screenshot shows a Yammer authentication dialog. At the top is the Yammer logo and tagline 'The Enterprise Social Network'. It prompts the user to 'Log in with your Yammer account' and to 'Connect Recognize by Recognize to your Yammer account.' A visual representation shows a user profile icon and the Recognize app icon with arrows indicating data flow. Below this, it asks 'Not Mary McAllister? (Sign out)'. On the right, it identifies the app as 'Recognize by Recognize (recognizeapp.com)' and states: 'Your credentials will be forwarded to Recognize on the recognizeapp.com network. It will be able to access and update your data.' At the bottom, there is a link to the 'Terms of Service' and two buttons: 'Allow' 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.

The screenshot shows the 'User Sync' configuration page in the Recognize dashboard. The left sidebar contains a 'Company Dashboard' menu with options like Dashboard, Custom Badges, Rewards, Nominations, Roles, Anniversaries, Accounts, Top Employees, Recognitions, Comments, and Settings. The main content area has a toggle for 'Sync Enabled' (currently OFF), a dropdown for 'Choose sync provider' set to 'Yammer', and a section for 'Sync users from these Yammer groups' with tags for 'Innovation' and 'Sales'. Below this is a table listing 'Innovation', 'Marketing', and 'Sales' groups. A 'Run User Sync' button is present. At the bottom, there is a section for 'Recognition sending limits' with a note: 'Limit the number of badges that can be given.'

Sync users from these Yammer groups
× Innovation × Sales
Innovation
Marketing
Sales

[Run User Sync](#)

Recognition sending limits
Limit the number of badges that can be given.

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.

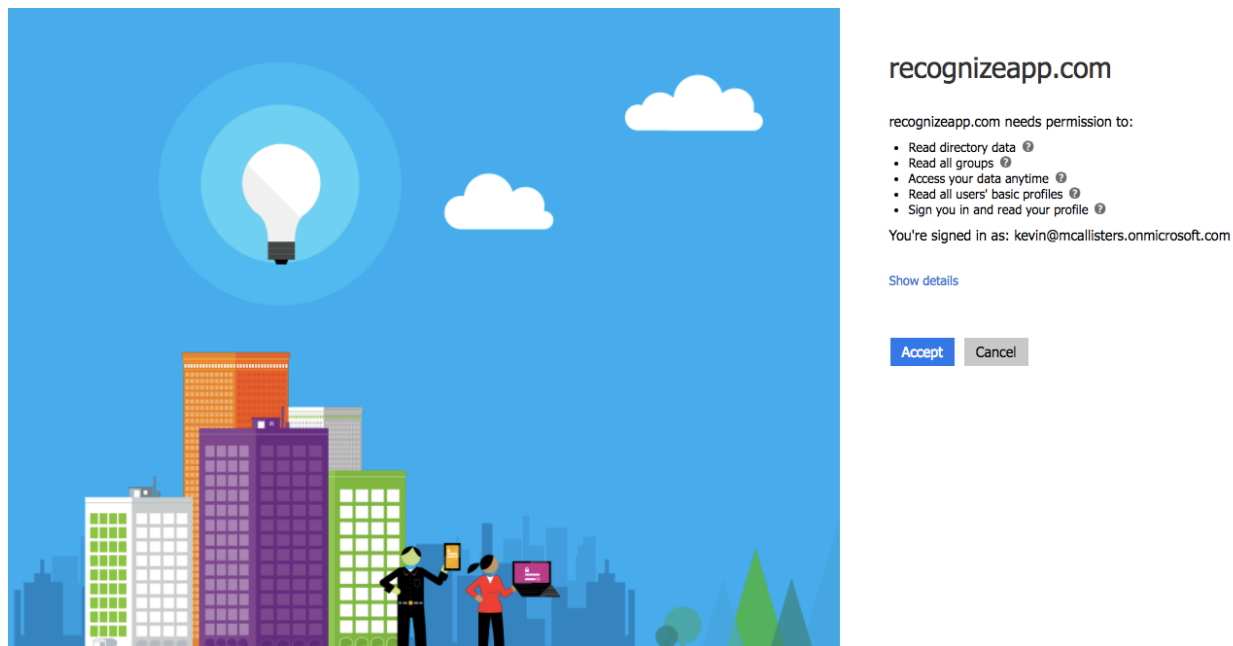
NOTE: It is a common practice to set up a Service Account to perform this step.

The screenshot shows the 'User Sync' settings page in the Recognize app. The top navigation bar includes 'Stream', 'Recognize', 'Stats', 'Users', 'Badges', and 'Rewards'. The left sidebar lists 'Company Dashboard' and various settings categories, with 'Settings' selected. The main content area has a toggle for 'Sync Enabled' (currently OFF), a dropdown for 'Choose sync provider' set to 'Microsoft / Office 365', and a prominent blue button labeled 'Authenticate with Microsoft / Office 365'. Below this, a message states: 'You must authenticate with Microsoft / Office 365 and be an administrator with Microsoft / Office 365 in order to edit the groups that will be synced.' Further down, there are sections for 'Recognition sending limits' with input fields for 'Default' (10) and 'Global' (10), both set to 'Daily'. Explanatory text follows each limit setting.

Select which account you would like to authenticate as.

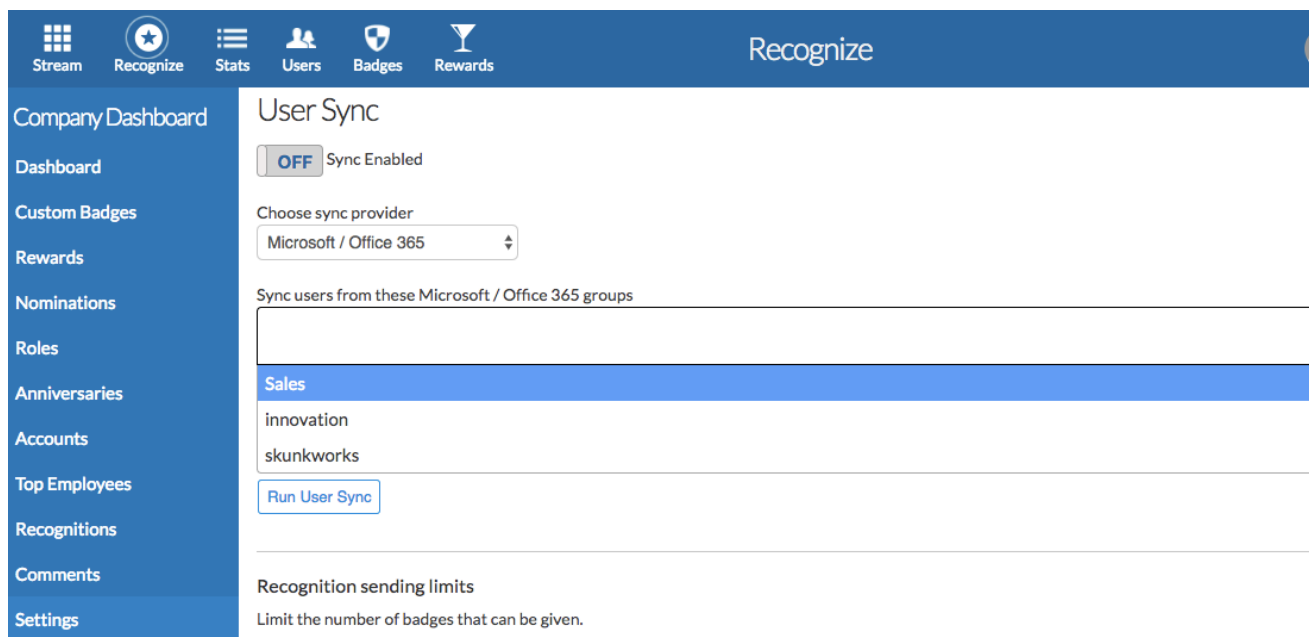
The screenshot shows the Microsoft account selection screen for 'recognizeapp.com'. The background features a stylized cityscape and a lightbulb icon. The text 'Which account do you want to use?' is displayed above a list of accounts. One account is shown: 'Mary McAllister' with email 'mary@mcallisters.onmicrosoft.com' and status 'Signed in'. Below this is a plus icon and the text 'Use another account'. At the bottom, there is copyright information for 2016 Microsoft and links for 'Terms of use' and 'Privacy & Cookies', along with the Microsoft logo.

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

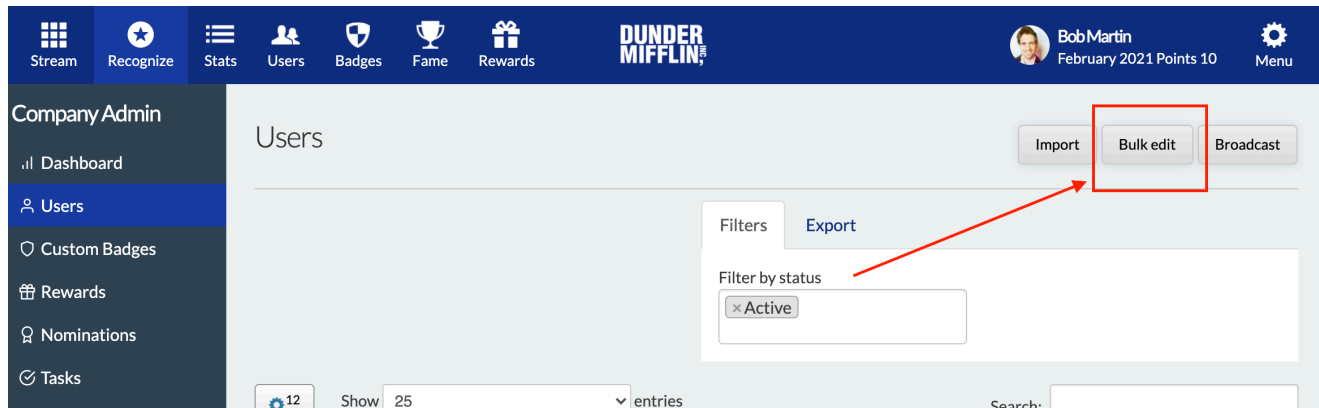
- At this time, selective choosing of which data to sync is not possible. We sync all the data specified in the Data section depending on availability from the identity provider.
- If you do not want to or cannot sync your user directory, we support "just-in-time" user provisioning. This is where we 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>

Appendix A - Service Accounts

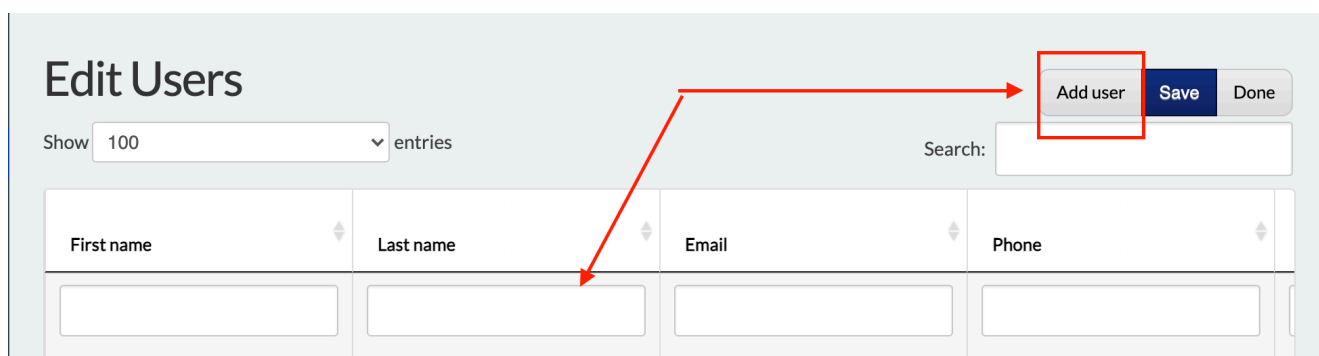
It is a common practice to use service accounts to create the authentication connection. This allows the connection to not be dependent on an individual user. Creating a service account on the sync provider side is out of scope of this document. However, here are some tips to set up a service account in Recognize.

Step 1 - Add user to Recognize

- Visit Company Admin > Users > Bulk Edit



- Click Add User to add a row



Edit Users

Add user
Save
Done

Show 100 entries

Search:

First name	Last name	Email	Phone
IT Service	Account	serviceaccount@example.com	

- Enter service account information and click Save and then Done
- Back on the Users page, remove the "Active" filter and search for your service account

Users

Import
Bulk edit
Broadcast

Filters
Export

Filter by status

Active

12 Show 25 entries

Search: service

First name	Last name	Email	Status	Edit	Actions
IT Service	Account	serviceaccount@example.com	Pending invite(Send invitation)	Edit	Disable

- Click on the gear icon at the top left of the table (not the top right of the page) to show more columns, and select the Reset Password column.

Active

9 Show 25 entries Search: serviceaccount

Employee	Email	System Roles	Admin	Status	Edit	Actions	Reset Password
	serviceaccount@example.com	Employee	No	Pending invite(Send invitation)	Edit	Disable	Show Link

(filtered from 142 total entries) Previous 1 Next

Employee

First name

Last name

Email

Phone

Network

Manager

Company Teams

System Roles

Admin

Company Roles

Department

Country

Status

Created At

Edit

Actions

Reset Password

Click this link to make the service account an admin

- Click "Show Link" next in the row for the corresponding service account user. This will give you a link to set a password and log in as the Recognize service user account.

Reset Password Link for IT Service Account

<https://recognizeapp.com/signup/xxxxxxx-xxxxxx/verify?locale=en-AU>

A user who has not set a password will receive an invite and those who have will receive a password reset url. Password reset urls will expire in 10 minutes.

OK

- Do not visit this link in your current browser session! Either log out or visit this url in a private / incognito browser session. Once you set a password, you can log in and go through the consent flow described in this document.
- Once you have completed the authentication, you can safely disable the service account from future logins. Even though the service account is disabled (from login), the sync will still use it to keep users up to date. You can always re-enable it from another admin account if you need to re-establish the connection.

First name	Last name	Email	System Roles	Admin	Status	Edit	Actions	Reset Password
IT Service	Account	serviceaccount@example.com	Employee	No	Active	Edit	Disable	Show Link Reset Password

Showing 1 to 1 of 1 entries (filtered from 142 total entries)

Previous 1 Next

Contact support@recognizeapp.com if you have any questions.