

# Completing a profile for an API User

Now that the interface between Cornerstone and edays has been set up, the user profiles will have transferred via the API from your Cornerstone system to your edays system. There are elements of the user profiles that are included in the API but there are other fields that need to be completed manually within edays.

Any user profiles that are included on the data capture form will be completed by your Implementation Specialist, but *you* will need to complete the user profiles of any new users added afterwards.

When users are transferred via the API, their profiles are allocated to a template called the "CSOD Default Template". To view all users allocated to this template, navigate to the Admin Panel, select Templates and then click on the "Members" button for that template as shown below:

Description	Members	Copy	View	Delete
Administrator Template	2	Copy	Edit	
Argentina	54	Copy	Edit	
Armenia	62	Copy	Edit	
Bulgaria	69	Copy	Edit	
Canada	118	Copy	Edit	
CSOD Default Template	4774	Copy	Edit	

Once here, you can view the list of all incomplete profiles or search for a specific user profile that you want to complete and select "Edit".

List of users

Show All entries

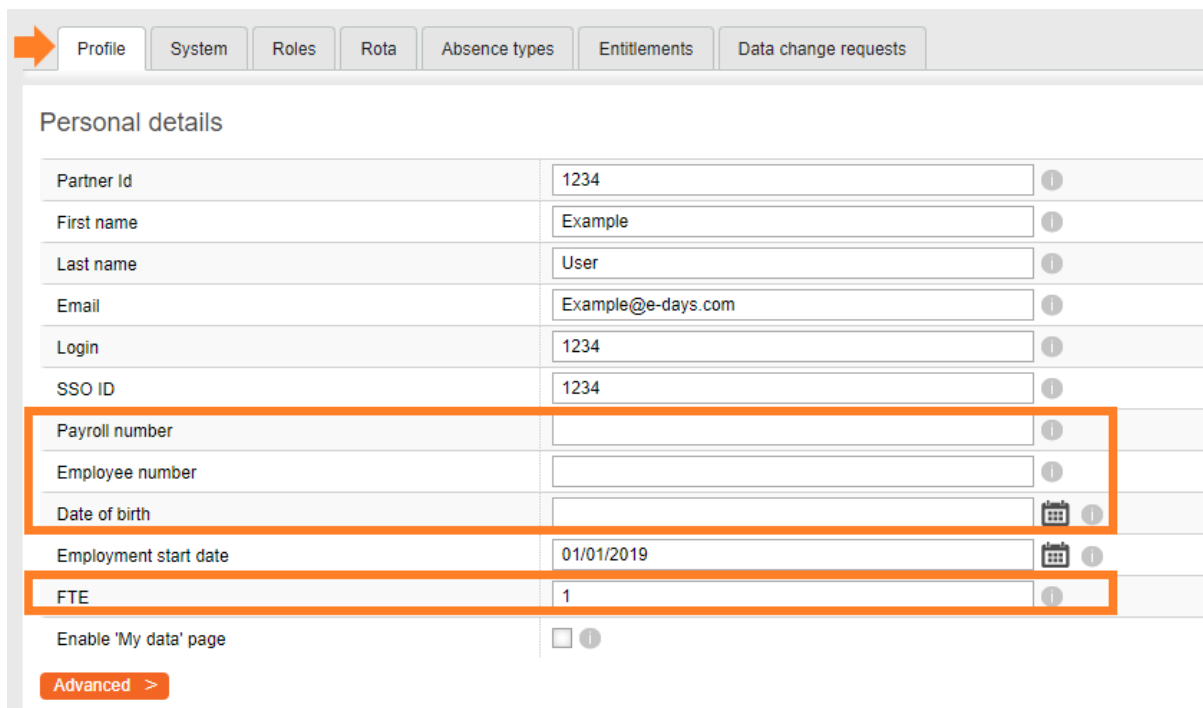
First name	Surname	Login	Payroll number	Employee number	Copy	View
Aaron	Sanchez	747			Copy	Edit
Aaryan	Mehra	647			Copy	Edit
Adam	Aaronson	752			Copy	Edit
Adam	Baumbach	1107			Copy	Edit
Addie	Admin	283			Copy	Edit

Below is a step-by-step guide of how to complete a user profile once it has been transferred via the Cornerstone API:

## Profile

The first tab is the “Profile” tab, here you can update the following fields:

- Payroll number – this field is not mandatory so can be left blank
- Employee number – this field is not mandatory so can be left blank
- Date of birth – this field is not mandatory so can be left blank
- FTE – an FTE of 1 is automatically populated in this field but if the new user works part-time then amend the value accordingly




Personal details		
Partner Id	1234	
First name	Example	
Last name	User	
Email	Example@e-days.com	
Login	1234	
SSO ID	1234	
Payroll number		
Employee number		
Date of birth		
Employment start date	01/01/2019	
FTE	1	
Enable 'My data' page	<input type="checkbox"/>	

Advanced >

## System



The next tab to the right is the “System” tab. Here you can update the following fields:

- User Template
- Hours per day







System Roles Rota Absence types Entitlements Data change requests

User template CSOD Default Template

### Password settings

Allow user(s) to change password	Inherited (No)	
Force user(s) to change password	Inherited (No)	

### Format settings


Time zone	Inherited ((UTC+01:00) Amsterdam, Berlin, Bern, ...)	
Date format	Inherited (Day - Month - Year)	
Date separator	Inherited (Slash (/))	
Calendar year day	Inherited (1)	
Calendar year month	Inherited (1)	
Hours per day	Inherited (8:30 hours)	

## Roles


The next tab to the right is the "Roles" tab, here you can update the following field:

- Role

Select "Custom" and then select a role from the drop-down list provided:

Profile  Roles Rota Absence types Entitlements Data change requests

### Roles

Roles	Custom	
Add role		

Advanced >

## Rota

The next tab to the right is the “Rota” tab. Here you can update the following field:

### ➤ Rota

Select “Apply rota” and then “Apply” a rota from the list of rotas available. Following that, you will be prompted to enter the start date of the rota for that user:

Profile
System
Rota
Absence types
Entitlements
Data change requests

User calendar setup

Inherited from template ('CSOD Default Template') (08:30 Hours per day)

Apply rota
Apply public holidays
Apply custom days
Apply calendar events

Current Rota

Name	Description	Recurrence	Start Date	Action
No data available in table				

Search

Name
Description

Show 10 entries

Name	Description	Recurrence	Start Date	Action
Mon/ Tue/ Wed/ Thu/ Fri		Every week on Monday,	01/01/2016	Apply
Mon/ Tue/ Wed/ Thu/ Fri/Sat/Sun		Every week on Monday,	01/01/2016	Apply
Sun/Mon/ Tue/ Wed/ Thu		Every week on Monday,	01/01/2016	Apply

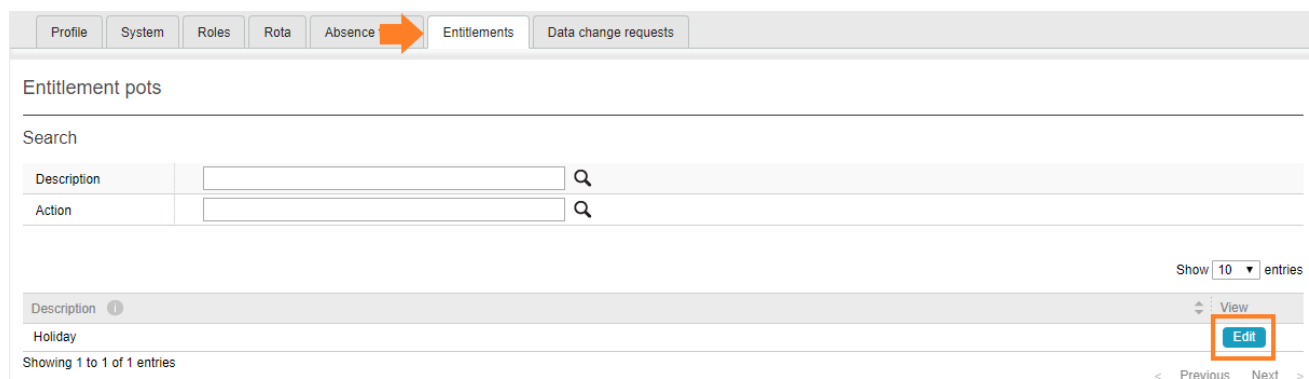
Previous
Next

## Entitlement's tab

The next tab to the right is the "Rota" tab, here you can update the following field:

### ➤ Entitlements

Select "Edit" for the entitlement pot that you want to enter a value for, and the "Edit" for the entitlement element you want to enter a value for:



Entitlement pots

Search

Description

Action

Show 10 entries

Description  View

Holiday

Showing 1 to 1 of 1 entries

< Previous Next >

You will now see your base entitlements for each employee based on their start date here (if you have default entitlements set up in the system for new users) or you will be able to enter a value for the current year manually:

### Entitlement element balance - Annual Entitlement



Last year Current year Next year

Adjust balance

Description

The base entitlement will automatically given to an employee for Next Year (if you have default entitlements set up in the system for new users) or you can adjust this balance here:

### Entitlement element balance - Annual Entitlement



Last year Current year Next year

Adjust balance

Description