Manage Integrations

Under the Company section of Perform, Manage Integrations allows you to view your company's integration results at the employee record level.

If you are unsure which integrations your company has or would like more information, reach out to your Paycor representative, or visit https://www.marketplace.paycor.com to learn more about our offerings.

Note: To access the Manage Integrations page, you must have the Company Administrator, HR Administrator, or Payroll Administrator security role.

How to Manage Integration Results

Follow these steps below to get started:

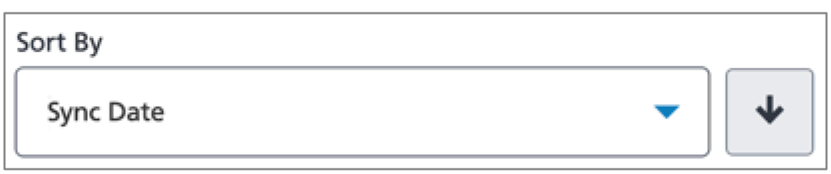
1. Under the **Company** menu in Perform, select **Manage Integrations**.

2. Your default view shows all your integration errors from the past 7 days. Depending on your organization, you may see multiple client names/IDs and/or multiple service names.

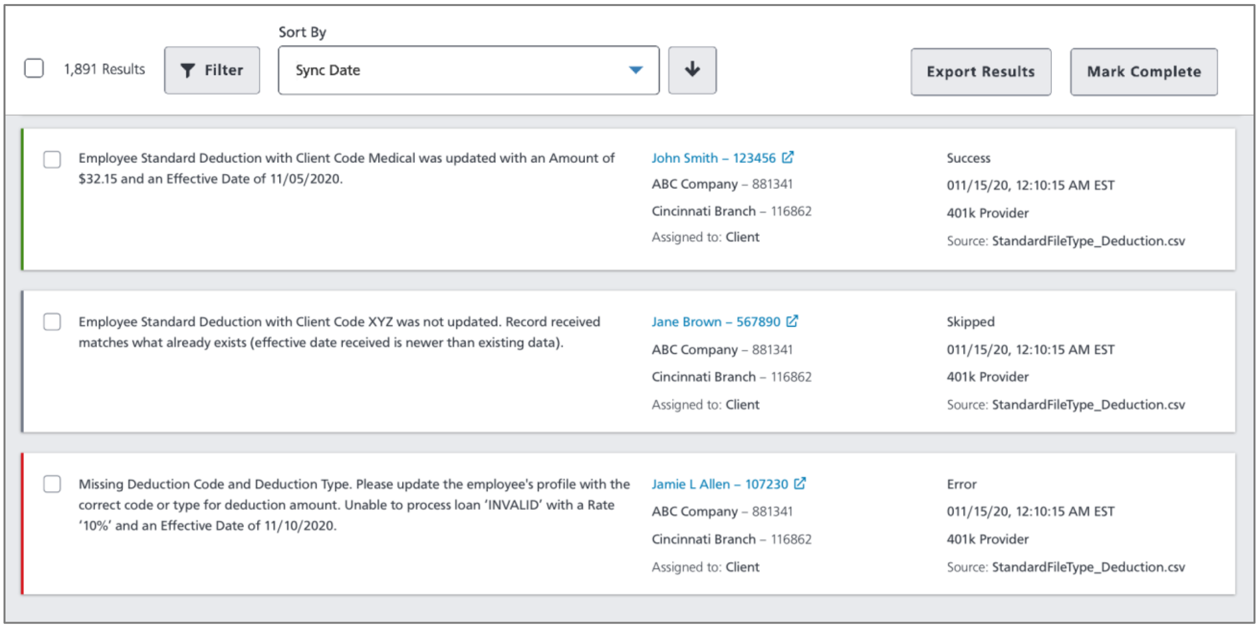
3. To change your view, select **Filter** and pick from any of the options below then hit **Apply.**

- **Sync Date:** Filter by a predetermined date range or a custom date range.
- **Result Type:** Choose the statuses of the results you want to see.
    - Error - Requires immediate action by you or a Paycor Specialist
    - Mark Complete - Employee record has been corrected and the error has been resolved
    - Skipped - No change to employee information so no action required
    - Success - Employee change processed successfully
- **Company & Client:** Filter to narrow down by your legal entities.
- **Service:** Refine your view to a specific integrated service.
- **Employee:** Search by employee name or number. You can make multiple selections.
- **Assigned to:** Resolve errors assigned to you and see which ones are being handled by Paycor
- **Source Name:** Search by an exact file or event name

4. Use the **Sort** dropdown to change the order of the result records. The default sort order is by **Sync Date**, with the most recent result at the top. You can select the **Arrow Icon** to sort the results by ascending or descending.



5. Review the result cards. Each card will be color coded (green for success and marked complete, gray for skipped, and red for error), display a message, and provide related details such as employee name and number, company name and number, client name and ID, assignment group, sync date and time, service name, and the source.

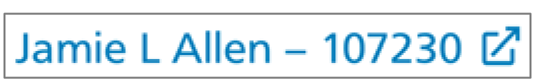


How to Resolve Errors

Follow these steps to view or take action on an employee record:

1. **Success** and **Skipped** results typically require no action and are displayed for awareness. **Error** results are indicated by the card's red sidebar and Error status and these records will require action. Check the assignment field to see if the error can be resolved by you, the **Client**, or a **Paycor Specialist**.

2. To take action on an error record, select the blue **Employee link** and a new tab will open in your browser to the **Employee Profile**. The field(s) requiring an edit will vary based on the service and error message. Save any changes made to the employee's profile.



3. Once the employee profile has been updated, go back to Manage Integrations, select the **checkbox** on the result card, and then click **Mark Complete** to note in the system that the error has been resolved. You will see the status change from error to "Marked Complete by Your Name". **Note:** If your view is only showing errors, the card you just marked complete will be hidden. You can see the card if you go to Filter, select Result Type, and select Marked Complete.

4. You can select multiple cards at a time or **Select All Results** by clicking the checkbox next to the total result number.

5. You can **Export** the filter results to a CSV file.