

CONVERCENT TO EQS DATASYNC MIGRATION

Guide on how to send HR Data to the Compliance Cockpit

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1. Important Context: Connection to a New System and Vendor

As part of the migration process, your organization will be connected to a **new system** provided by a **new vendor (EQS)**. This marks a transition away from your existing setup in **Convercent**, where user and system data were previously sent and managed.

Going forward, data will be sent to the **EQS Compliance Platform** using **DataSync**, EQS's integration framework for user provisioning. This represents a new technical connection, configuration, and maintenance process - distinct from your previous vendor integrations.

It's important that technical teams involved in the migration understand this change, as new credentials, connection endpoints, and data mappings will need to be established and validated within EQS. This guide has been designed specifically to support migration customers through that setup, providing step-by-step instructions and mapping details to ensure a smooth transition.

2. Migration

All existing accounts in Convercent and their system attributes will be created in EQS via the migration tooling. After the migration tooling is completed, it is important to review the newly created users in EQS. We recommend validating email addresses and Employee IDs to ensure accuracy. This step helps guarantee that the DataSync connector can update these accounts correctly and avoids creating duplicate user records.

3. Flat File Integration

The first option we will review is flat file integration. This process is an automated process for ingesting a Microsoft Worksheet into the Compliance Platform. User records and their permissions can be managed by EQS retrieving files via SFTP actions. It is the customer's responsibility to host the FTP server and generate the file following the guidelines listed below.

- Customers will be responsible for maintaining their own FTP server.
- Clients will create an account for their EQS data synchronization.
- The file type will need to be converted from csv to XLSX

3.1. Attribute Mapping

Now let's compare the mandatory fields in Convercent to EQS

Convercent

Header	Accepted Values	Sample Values
EmploymentIdentifier	String Text	123
UserName	Valid Email Format	dorian.irvine@eqs.com
ContactEmail	Valid Email Format	dorian.irvine@eqs.com
AuthenticationMethod	'Convercent Password' or configured SSO name	EQS SSO
IsActive	True or False	True
FirstName	String Text	Dorian
LastName	String Text	Irvine

EQS

Header	Accepted Values	Sample Values
First Name	String Text	Dorian
Last Name	String Text	Irvine
Email	Valid Email Format	dorian.irvine@eqs.com
Employee ID	String Text	123
Profile Status	Active or Inactive	Active

These attributes and their values will need to be updated in the new file format. The remaining supported fields in the EQS platform are listed below. Take the additional attributes from your Convercent file template and map them to a corresponding EQS attribute.

Header	Accepted Values	Sample Values	Notes
Title	'Mr' 'Mrs'	Mr.	Any other values will cause errors in the upload.
Middle Name	String Text	Owen	
Academic Title	String Text	Dr.	

Job	String Text	Technical Consultant	
Department	String Text	Professional Services	If there are existing Departments present in Data Center, that value is displayed here. You cannot add a new Department. You can only add an existing Department name to the user. If you want to add a new value, then that should be done via the Attributes tab on Data Center or bulk upload via the Organization Attribute excel.
External Company	String Text	Convercent	This column must be filled in the case of an external staff. For the internal staff, this column must be left empty.
Company Relationship	Employee, Freelancer, Consultant, Vendor, Contractor, or left empty	Employee	If the employee is an internal staff, this field can be empty, or 'Employee' should be added An external staff can be described as 'Freelancer', 'Consultant', 'Vendor', 'Contractor', etc.
Phone	Numbers, Parentheses, Dashes, and Addition sign	+1(719)240-8679	
Mobile	Numbers, Parentheses, Dashes, and Addition sign	+1(719)240-8679	
Supervisor's Email	Valid Email Format	ryan.mcneal@eqs.com	
Tags	String Text	Cast; TeamLife; HR	Please, ensure each tag is delimited by semicolon (;)
Business Unit	String Text	Ethics	If there are existing Business Units present in Data Center, that value is displayed here. You cannot add a new Business Unit. You can only add an existing Business Unit name to the user. If you want to add a new value, then that should be done via the Attributes tab on Data Center or bulk upload via the Organization Attribute excel.

Location	String Text	Denver	If there are existing Locations present in Data Center, that value is displayed here. You cannot add a new Location. You can only add an existing Location name to the user. If you want to add a new value, then that should be done via the Attributes tab on Data Center or bulk upload via the Organization Attribute excel.
Country	ISO 3166-1 alpha-2 format	DE	Please, use the two-letter country codes as per ISO 3166-1: https://en.wikipedia.org/wiki/ISO_3166-1_alpha-2
Preferred Language	See Section 3.2	en	Empty fields will be set to your company language.
Hire Date	ISO 8601 format	2021-09-30	
Login Methods	SSO or Password	SSO	This attribute is only relevant for Hybrid Login. Accepted values are sso and password. For adding both values, they are separated by a semicolon (;).
*Roles	Roles that are already set in Data Center	it-manager	All users are automatically added to the employee role - this does not need to be entered here. If a user should have another role in addition to the employee role, then enter it here. Please, only use role identification of roles that are already set in Data Center. The role identification can be found on the bottom left corner of the role cards in the permissions overview of Data Center. See example below. Multiple roles are separated by a semicolon (;).

3.1.1. Additional Guidance on Role Assignment

Role column is optional in DataSync. If Role is included, the values will override any existing role assignments, including those migrated via tooling. Adding a role column increases complexity and may result in incorrect access permissions.

We recommend omitting the role column unless:

- You have three (3) or fewer roles (e.g., Admin, Supervisor, Employee).
- You are 100% confident your team can assign roles accurately on a user-by-user basis.

If uncertain, it's safer to manage roles manually post-migration to avoid wiping or misassigning access.

3.1.2. Custom User Attributes

Custom Attributes are supported for user provisioning via SFTP. 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 (YYYY-MM-DD)

3.1.3. PGP Encryption

EQS will provide the public key that is generated in the DataSync Connector. Customer can use the generated key to encrypt files from their SFTP server. Key can be updated or turned off at any time.

3.1.4. SSH Authentication

EQS supports multiple authentication methods into SFTP servers including SSH keys. The client is required to generate the key pair and seed the private key in the data sync connector. The public key will be installed on the SFTP server for the EQS user account.

3.2. Preferred Language Attribute Values

'en' for English	'zh_TW' for Chinese Traditional
'ar' for Arabic	'zh_CN' for Chinese Simplified
'de' for German	'cs' for Czech
'de-ch' for Swiss German	'ko' for Korean
'nl' for Dutch	'th' for Thai
'fr' for French	'mg' for Malagasy
'ru' for Russian	'ro' for Romanian

'it' for Italian	'pl' for Polish
'es' for Spanish	'sv' for Swedish
'pt' for Portuguese	'ja' for Japanese
'pt_BR' for Portuguese (BR)	'hu' for Hungarian

3.3. Step-by-Step Configuration Process

01. Log into EQS Compliance Cockpit with your user credentials.
02. Click the gear icon on the top-right to open the sidebar settings.
03. Select “DataSync Configuration,” then click the “Add DataSync” button to open the connector creation dialog.
04. Make sure the “SFTP/FTPS” connector is selected in the dropdown and enter a name for your connector with the connection configuration, then click the “Create” button.
05. 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.

SFTP new

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

Enable DataSync Delete DataSync configuration Save

Connector setup
Identify and describe the connection.

*Connector name (required)
SFTP

*Contact email
dorian.irvine@eqs.com

We will notify this email in case of errors or issues with your connection.

Server Details
Define the network target of your file transfer.

*Host
sftp.comvercent.com

*Port
22

Authentication
Enter the credentials of your server to establish the connection.

*Username
dorian01

*Authentication Type
Password And Private Key

Password
●●●●●●●●

*Private Key
-----BEGIN OPENSSH PRIVATE KEY-----
b388bnkzpc7ZXMjSFAAAAAACmFic2l1MjdhAAAAgYmNjYXN0AAAGAAABCTUY7ZD
QwRzASu+vsBamEAAAGAAANAAANAAAB3Nzc7yc2EAAAADAGBAACAGD00iN14c0

File Details
Configure what file is transferred and how it is formatted.

*Filename
dummy_data04.xlsx

*Path
/NU/Users/

View/Customize Settings

06. 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.

07. Review the roles & permissions in the Data Center. By default, the below two roles will be present within the Roles & Permissions tab. These two roles cannot be deleted.

- Employee: All the employees within the organization have access to the Integrity Hub with Approvals, Policies and Policy Buddy.
- Admin: All admins who will have access to EQS Compliance COCKPIT, Approvals and Data Center and all other active modules.

08. Customized roles and permissions can be created via the Roles & Permissions tab. Create any new roles necessary for the implementation. Additional information on the scope of permissions for roles can be found here: <https://support-center.eqs.com/s/article/Default-Roles>

09. All roles must be created as an app role in the enterprise application of the identity provider. Remember that the value must be the same as the Role slug name in EQS Compliance Cockpit Data Center module.

3.4. Data Testing & Production Configuration

01. Generate a test file containing minimum employees and deliver to the SFTP site. It is recommended to only list project employees in the file.
02. Select Run Manual DataSync button
03. A notification will appear stating "Manual synchronization has started successfully. For a large number of users, this process may take some time.
04. Select the 'Refresh Logs' button and the file import's processing results will be available via XLSX downloadable error log or viewable JSON payload.

07. Now we can enable Data Synchronization with this toggle (don't forget to save using the top right button in the panel):
08. Once the Data Synchronization is enabled the automatic data synchronization will take place in the next opportunity. A manual trigger for synchronization is also available.

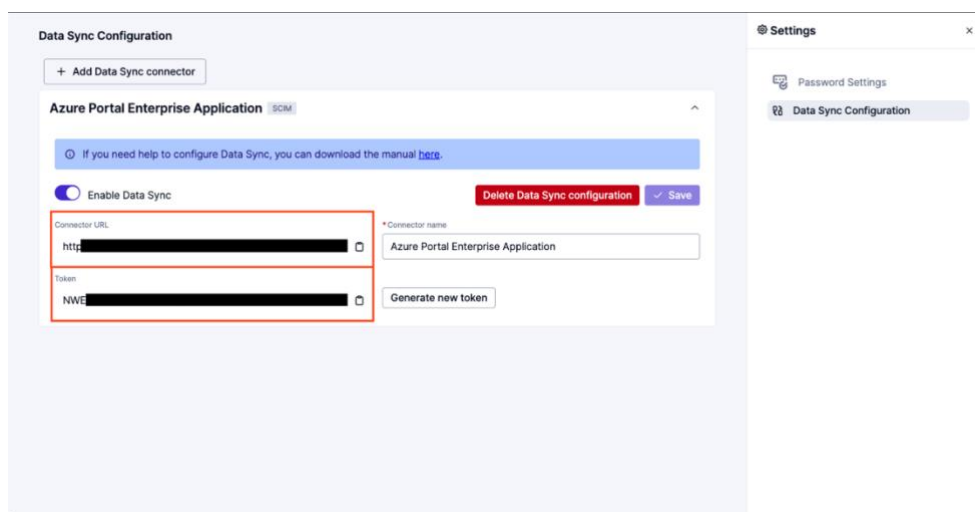
4. System for Cross-domain Identity Management (SCIM)

4.1. Overview of SCIM

The second option for user provisioning and access management is the open-standard SCIM protocol. SCIM implementation on the EQS platform is a relatively quick and easy project that allows for automated provisioning. If you want to pursue this option, it is important to first consult with internal IT teams to ensure that all necessary HR data points are stored in the compatible source system. The client will be responsible for setting up this connector from their chosen system by following the guidelines listed below. A JSON-Schema definition of all employee objects which can be sent to EQS Data Center can be found at this link: api-compliance.eqscockpit.com/data-center/api/datasync/scim/Schemas

4.2. DataSync Configuration

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



05. 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 identity provider 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.
06. Open the enterprise application in your identity provider for EQS and enter the credentials generated from DataCenter.
07. Test if the connection is successful
08. Now we need to configure the attribute mapping, so which user information that you want to send to the EQS Data Center for each user using the SCIM schema hyperlink in section 4.1

4.3. Attribute Mapping

01. Required attributes for user provisioning are the following fields:

- Id
- userName (the email used for login)
- familyName
- GivenName

02. “employeeNumber” is not a required field but is strongly recommended and set as the highest priority for matching precedence. This will allow for updating migrated accounts with lowest risk of duplication of user accounts.

- 03. Set "userName" as second priority for matching precedence.
- 04. An important callout is the attribute "emails" solely exists as compatibility with SCIMs default mapping, as our platform does not have support for multiple e-mails and the single e-mail that employee may have is "userName". Therefore, this is marked as read-only field.
- 05. Complete mappings for remaining system attributes that are wanted to display in Data Center.

4.4. Custom Attributes

Custom attributes are required to be created in Data Center before getting provisioned via the SCIM connector. Once the attributes are created, a SCIM attribute key can be retrieved from the Data Center attributes page that will be used for mapping in the identity provider. The keys can be viewed in the SCIM Schema for the connector by searching for the connector URL in browser.

Custom 10

Name	SCIM attribute key	Format i
Compensation1	compensation1	ABC 123 Text
Custom	custom	ABC 123 Text
IsExempt	isExempt	ABC 123 Text
Employment	employment	ABC 123 Text
HR Business Partner	hrBusinessPartner	ABC 123 Text
ManagesPeople	managesPeople	ABC 123 Text
Entity	entity	ABC 123 Text

Additionally, in the SCIM connector the custom attribute mapping can be reviewed as well.

SCIM SCIM

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

Enable DataSync Delete DataSync configuration Save

Connector URL: * Connector name:

Token: Generate new token

Custom attribute mapping

Attribute Name	SCIM attribute key	
Compensation1	compensation1	
Custom	custom	
IsExempt	isExempt	
Employment	employment	
Employment Type	employmentType	
HR Business Partner	HRBusinessPartner	
ManagesPeople	managesPeople	
Entity	entity	
TestLength	testLength	
Crystal Attribute	crystalAttribute	
DONotUSETest1	dONotUSETest1	

In the attribute mapping of the SCIM application a new mapping can be created for each attribute. When adding attributes, the namespace is required to precede the attribute key.

In example, **urn:ietf:params:scim:schemas:eqs:datacenter:1.0>User:CUAs.custom** is the appropriate naming convention for a custom attribute titled 'Custom'.

Add all the attributes and then provision a user then review the sync log in EQS. The sync log allows a downloadable JSON file and viewable JSON payload. This can be used to validate that user profiles are getting updated as expected.

Sync log ^

Date	Created users	Modified users	Users with errors	State
2026-05-11T15:09:05+00:00	0	1	0	Synced
2026-05-11T15:09:05+00:00	0	1	0	Synced
2026-05-11T15:09:04+00:00	0	1	0	Synced
2026-05-11T15:09:02+00:00	0	0	0	Synced
2026-05-11T15:09:02+00:00	0	0	0	Synced
2026-05-11T15:09:01+00:00	0	0	0	Synced
2026-05-11T15:09:01+00:00	0	0	0	Synced
2026-05-11T15:09:01+00:00	0	0	0	Synced
2026-05-11T15:09:00+00:00	0	0	0	Synced
2026-05-11T15:08:58+00:00	0	1	0	Sync failed

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Example:

```
{
  "op": "add",
  "value": {
```

```

"urn:ietf:params:scim:schemas:eqs:datacenter:1.0:User:CUAs.custom": "Denver",
"urn:ietf:params:scim:schemas:eqs:datacenter:1.0:User:businessUnitName": "EQS"
}
}
]
}

```

Custom user attributes	
Compensation1	Salary
Custom	Denver
IsExempt	True
Employment	Fulltime

4.5. Role Synchronization

01. Now you must add a feature flag by adding query parameter aadOptscim062020 to SCIM URL. This is to make de-assignments work.
02. A new attribute mapping must be defined for role assignment. This attribute requires Expression mapping type equal to AssertiveAppRoleAssignmentsComplex([appRoleAssignments]) to the target attribute roles.
03. Login to Compliance Cockpit and review the roles & permissions in the Data Center. By default, the below two roles will be present within the Roles & Permissions tab. These two roles cannot be deleted.
 - Employee: All the employees within the organization have access to Integrity Hub with Approvals, Policies and Policy Buddy.
 - Admin: All admins who will have access to EQS Compliance COCKPIT, Approvals and Data Center and all other active modules.

04. Customized roles and permissions can be created via the Roles & Permissions tab. Create any new roles necessary for the implementation. Additional information on the scope of permissions for roles can be found here: <https://support-center.eqs.com/s/article/Default-Roles>
05. All roles must be created as an app role in the enterprise application of the identity provider. Remember that the value must be the same as the Role slug name in EQS Compliance Cockpit Data Center module.

4.6. Data Testing & Automatic Provisioning

01. Assign a single user or small group of employees that are aware of project implementation to the enterprise application with their desired role.
02. Review the provisioning logs from the identity provider for record errors.
03. 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:

```
{
  "schemas": [
    "urn:ietf:params:scim:schemas:core:2.0:User",
    "urn:ietf:params:scim:schemas:extension:enterprise:2.0:User",
    "urn:ietf:params:scim:schemas:eqs:datacenter:1.0:User"
  ],
  "meta": {
    "resourceType": "User"
  },
  "userName": "dorian.irvine@noemail.com",
  "displayName": "Dorian Irvine",
  "active": "true",
  "locale": "en-US",
  "preferredLanguage": "en-US",
  "userType": "Internal",
```

```
"title": "Technical Consultant",
"hireDate": "2027-01-01",
"name": {
  "honorificPrefix": "Mr",
  "givenName": "Dorian",
  "middleName": "Nathaniel Owen",
  "familyName": "Irvine"
},
"emails": [
  {
    "type": "work",
    "value": "dorian.irvine@noemail.com",
    "primary": true
  }
],
"phoneNumbers": [
  {
    "type": "work",
    "value": "+1-512-522-5468",
    "primary": true
  },
  {
    "type": "mobile",
    "value": "303-970-9867"
  }
],
"roles": [
  {
```

```
    "type": "Postman",
    "value": "Admin",
    "display": "Admin"
  },
  {
    "type": "Postman",
    "value": "Employee",
    "display": "Employee"
  },
  {
    "type": "Postman",
    "value": "approver",
    "display": "Approver"
  }
],
"addresses": [
  {
    "type": "work",
    "country": "US"
  },
  {
    "type": "home",
    "region": "Colorado",
    "country": "US",
    "locality": "Colorado Springs",
    "formatted": "Colorado Springs",
    "postalCode": "80218",
    "streetAddress": "321 Fake Street"
```

```
    }  
  ],  
  "urn:ietf:params:scim:schemas:extension:enterprise:2.0:User": {  
    "employeeNumber": "X201",  
    "department": "Professional Services",  
    "manager": {  
      "value": "8d131acd-5341-4219-824d-98fe5913b381",  
      "$ref": "https://api-compliance.eqscockpit.com/data-center/api/datasync/scim/56297f2c-bcd3-403b-870f-1dfd2948f4a6/Users/8d131acd-5341-4219-824d-98fe5913b381"  
    }  
  },  
  "urn:ietf:params:scim:schemas:eqs:datacenter:1.0:User": {  
    "academicTitle": "Professor",  
    "tags": [  
      "Postman",  
      "API"  
    ],  
    "businessUnitName": "Development",  
    "preferredCurrencyCode": "USD"  
  }  
}
```

SCIM SCIM ^

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

Enable DataSync

Delete DataSync configuration
✓ Save

Connector URL:
✕
 * Connector name:

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

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04. Troubleshoot any errors or unexpected results from provisioning.
05. 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.
06. If users need several roles they can be assigned multiple times in the enterprise application under different roles.
07. Enable automatic provisioning in the identity provider.