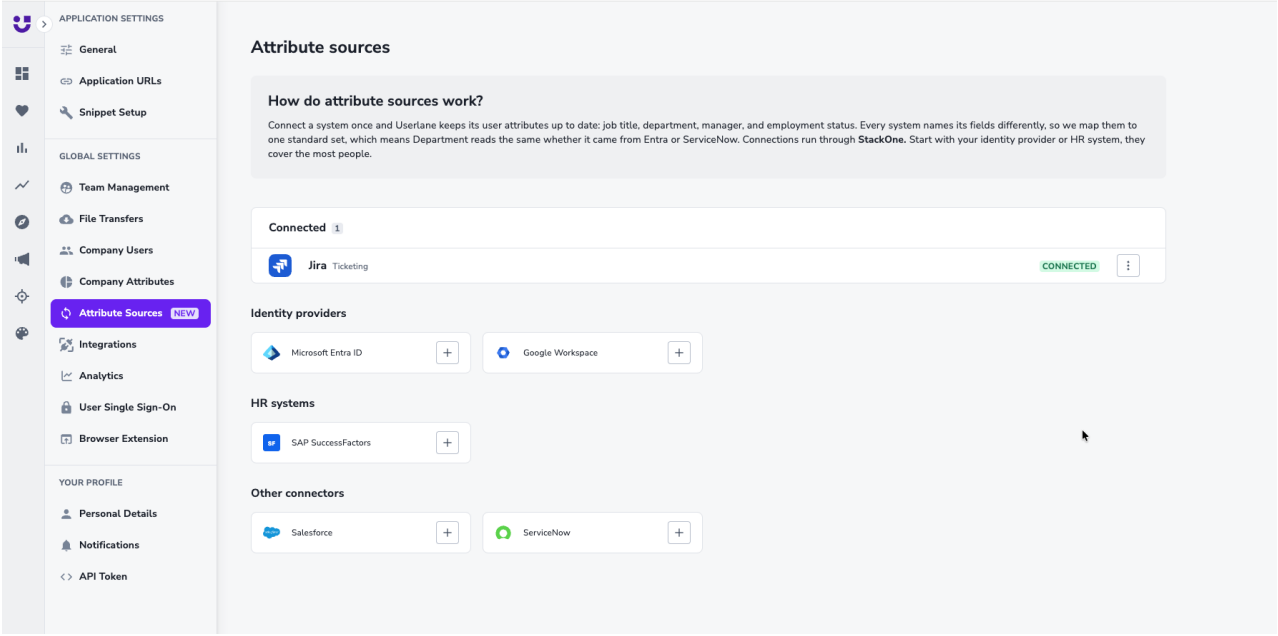
Connecting an attribute source

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Connecting an attribute source lets you pull user attributes from a system you already use. Once connected, that information updates in Userlane automatically, so your audiences and your targeting stay accurate without anyone maintaining a list.



What Userlane reads

Userlane has a fixed set of attributes it looks for. Every system you connect is matched against this same set, whichever system it is.

- **Job title.** The person's title as recorded in the source system.
- **Department.** The department or team they belong to.
- **Manager.** A reference to the person they report to.
- **Whether they manage others.** A yes or no value, where the source system provides one.
- **Employment status.** Whether they are currently active.
- **Employment type.** Full time, part time, contractor, and similar.
- **Hire date.** When they joined.
- **Employee number.** Their identifier in the source system.
- **Company name.** The legal entity or subsidiary they belong to.
- **Company ID.** The identifier for that entity, where one exists.
- **Country.** Their country.
- **Region.** State or province.
- **City.** Their city.
- **Preferred language.** The language they have set in the source system.
- **App permission.** Their permission level or profile in the source system, such as administrator or standard user.

What appears in Userlane after you connect

Attributes are created for you. When a source provides one of the attributes above, Userlane creates it automatically and starts filling it in. You do not need to create anything beforehand.

Only attributes the source actually provides are created. If your system holds no hire date, no hire date attribute appears.

If you already have an attribute with the same name, the connector writes into it. Attributes are matched by name. If you already created an attribute called job_title, and a connected system provides job title, the connection updates that existing attribute rather than creating a second one. Whatever was in it before is replaced, and it will keep being replaced every day the connection syncs.

This is usually what you want, because it means one attribute rather than two. It is a problem if you were populating that attribute from somewhere else and expected it to stay as it was. If you have attributes coming from your own application or a manual upload, check their names against the list above before you connect a source.

The connected system becomes the place you maintain the data

Once a source is connected, it is the authority for the attributes it provides. Each sync writes what the source currently holds, so changes made by hand in Userlane are replaced the next time it runs.

This is intended rather than a limitation. It is what keeps the two systems from drifting apart. In practice it means that after connecting a source, corrections belong in that system rather than in Userlane. If someone's department is wrong in Userlane, fix it in your HR system and it will be right here within a day.

How Userlane matches users

People are matched by work email address. Userlane compares the email on each incoming record with the email on your Userlane users, ignoring capitalization and spaces. Where they match, the attributes are applied. Where they do not, nothing is applied to that person.

Email is therefore the one field a source system has to provide. It is used to identify people rather than stored as an attribute, and a connection that cannot read it cannot match anyone at all.

This is the single most common reason a connection appears to do nothing. If your HR system holds a different address than the one people sign in to Userlane with, the connection will work perfectly and match nobody. It is worth comparing a handful of people in both systems before you connect.

What happens to everything else

Two rules, and both are worth knowing before you connect.

Anything not on that list is dropped. Source systems hold far more than Userlane asks for. Phone numbers, home addresses, compensation, performance data, and any custom fields your team has added are not read and not stored. They are discarded at the point of collection rather than kept and ignored.

Anything on that list that your system does not hold simply stays empty. No system provides all of these. A project tool may hold a language preference and nothing about employment. An HR system usually holds most of them. Userlane takes what is there and leaves the rest blank.

The same is true of fields your system holds but does not fill in. If job title exists in your system but half your

records leave it empty, half your people will have no job title in Userlane. Connecting a source does not improve the data in it, so it is worth checking a few records before you connect rather than after.

If you need something that is not on the list, talk to your Userlane contact before connecting. It will not arrive on its own.

Three more things true of every connector

It only reads. Userlane never writes to your system, and never changes anything in it.

It only updates people Userlane already knows about. If someone appears in your HR system but has not used Userlane yet, nothing is created for them.

It never removes anything. A connector adds and updates attributes, and that is all. If your source system stops providing a value, the last value Userlane received stays in place rather than being cleared. Nothing you connect can delete attribute data.

Connections apply across your whole company

A connected source applies to your entire Userlane account, not to one application or website. Connect your HR system once and the attributes are available everywhere you use Userlane.

You cannot connect a source for a single property. If you need attributes that apply to only one application, the Attribute Import API supports that.

Who needs to be involved

Two things happen in your own system, and they can be done by two different people.

1. Registering the connection. Someone sets up an application, or an equivalent, in the source system. This is a one-time task per system and usually needs an administrator of that system.
2. Authorizing it. Someone signs in to approve the connection. This is the step that decides what Userlane can see, and it is where connections quietly go wrong.

The most common failure has no error message. A connection reads your directory using the permissions of whoever authorized it. If that person can only see their own record, Userlane receives only their record. In some systems the result is an empty list rather than a warning. The connection will look successful in both Userlane and your source system.

This is why the permission matters more than the job title. See the page for your system for the specific permission needed.

In most cases you do not need to hand over full administrator rights. For Salesforce and Jira the permission needed can be granted to a normal account without making anyone an administrator. Microsoft Entra ID is the exception: approving the connection requires a Global Administrator or Privileged Role Administrator.

You also need an Admin, Portfolio Owner, or Deployment Manager role in Userlane to set the connection up on our side.

Before you start: the values you will need from us

Registering the application in your own system asks for a redirect or callback address, so that the system knows where to send the authorization back to. That address is specific to Userlane and you will not be able to work it out yourself.

Ask your Userlane contact for it before you begin. They will give you the correct address for the system you are connecting. Without it the application can be created but the connection will not complete.

Connecting a source

1. Ask your Userlane contact for the callback address for your system.
2. Register an application in your source system, following the page for that system.
3. In Userlane, go to company settings and open Attribute sources.
4. Choose your system from the list.
5. Enter the values from the setup step in your source system.
6. Complete the sign-in step your system presents, using an account that holds the permission described on that system's page.
7. Your system appears under connected sources.

If your system is not listed

The list shows every source you can connect today. If yours is not there, speak to your Userlane contact. Some systems we can support with a little preparation, and they can tell you whether yours is one of them.

In the meantime, you can send attribute information to Userlane directly through the Attribute Import API, which works with any system your team can export from. The API also supports a couple of things connectors do not: it can target a single application rather than your whole company, and it can replace values rather than only adding them.

When your information arrives

The first update usually appears within about fifteen minutes of connecting.

After that, Userlane refreshes overnight, once a day. You cannot change how often this happens, and there is no way to trigger an update on demand.

Disconnecting a source

You can disable or remove a connected source at any time. Userlane stops reading from it immediately.

If something is not working

- **Nothing has appeared yet.** Give it fifteen minutes from connecting. After that, the most common cause is an email mismatch: check that a few people have the same email address in both systems.
- **Some people have attributes and others do not.** Two likely causes. Either those people have a different email address in the two systems, or the account that authorized the connection cannot see them. Check the permission described on the page for your system, then reconnect.
- **Some attributes are empty for everyone.** Your source system either does not hold that attribute or does not fill it in. Check a few records in the source system directly.
- **An attribute you were already using now holds different values.** A connected source is writing into it, because it has the same name as one of the attributes Userlane collects. See the note above on matching names.

- **A change you made in Userlane has reverted.** Expected. The connected system is the authority for the attributes it provides, so edits made here are replaced by the next sync. Make the change in the source system instead.
- **Setup did not finish.** This is usually the setup in your source system rather than Userlane. Check that it was completed, that the values were copied in full, and that the callback address matches the one your Userlane contact gave you. If your organization reviews new applications, it may still be waiting for approval.
- **Information stopped updating.** The credentials may have expired, or the setup in your source system may have been changed or removed. Reconnect the source to fix it.
- **A value changed unexpectedly.** If more than one source provides the same attribute, the most recent update is the one you see.

If none of this helps, contact support.