



Automated User Provisioning Guidelines

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1. Executive Summary

This document provides an overview of integrating Workvivo with a third-party system for the purposes of automatically provisioning users into the Workvivo platform. In this scenario, the third-party system is designated as the source of truth for user/employee data in the client organisation.

2. Workvivo data requirements

Workvivo has minimal data requirements when it comes to provisioning users for access to the application. We request that any incoming data is provided in the format that it should be displayed in the Workvivo system. If any fields have specific formatting conventions in the third-party system - for example, if names are stored in uppercase, we request that they are sent to Workvivo in the correct case for display purposes.

2.1. File format

For file-based user data import, we support CSV and XLSX files as standard. CSV is the preferred format. For all of these formats, we can support import without modification as long as it adheres to the following attributes:

- The first row of the file contains the column headings as described in the field lists outlined in this document.
- The order of columns is not important.
- Any columns not required by Workvivo will be ignored.

For CSV files specifically, we support import without modification on the basis that:

- Fields are enclosed with double quotes.
- Columns are separated with commas.
- Rows are terminated by a newline character.

We can support files that fall outside of the above requirements, but system modification may be required to do so.

2.2.Mandatory fields

The following are the mandatory fields that we require to provision users in the Workvivo system:

Column Heading	Description	Format	Notes
ID	Third-party ID	String	We use this to find existing user records and check if an update or deactivation is required. Typically this is the employee ID or employee no. but if there are leading zeros in this value, another field must be provided instead e.g. username or email address.
Email	Email address	String	Must be a valid email address and must be unique per user.
FirstName	First name	String	
LastName	Last name	String	
JobTitle	Job title	String	
[Group Type 1]	Department-style group	String	The column heading should be the name of the group type, e.g. "Department", "Division", "Work Group", etc.
[Group Type 2]	Location-style group	String	The column heading should be the name of the group type, e.g. "Location", "Office", "Region", etc.

At a minimum, we require at least two group columns to classify users. We require:

- one department-style group type such as Department, Division, Team, etc;
- one location-style group type such as Location, Office, Country, Region, etc.

We support the inclusion of any number of groups so please provide additional group columns if beneficial for your organisation.

The group data should be in a string format and should be the name of the group. The group types need to be pre-configured in Workvivo before the group data will be imported.

For group types, if the name of the group type contains a space, e.g. "Work Location", please include the space in the Column Heading, i.e. use "Work Location" and not "WorkLocation".

If a new group term is encountered during the provisioning process, we will create it and assign the user to it. Please do not send additional data in the group columns or this will be included as part of the group name.

2.3.Optional, but desirable fields

The following fields are optional, in that they are not strictly required for the Workvivo platform to operate. Their inclusion, however, greatly enriches the functionality of Workvivo so we suggest including them if possible.

Column Heading	Description	Format	Notes
HireDate	Hire date	YYYY-MM-DD	If provided, Workvivo can issue automated work anniversary posts and new joiner welcome posts. Each user can opt out of work anniversary posts if they wish
DirectDial	Direct dial no.	String	We don't impose any specific formatting rules on phone number fields.
MobilePhone	Mobile phone no.	String	We don't impose any specific formatting rules on phone number fields.
ManagerID	Third-party ID of that employee's manager	String	We use this field to make an association between employees. If employees' Manager IDs are provided, we can: <ul style="list-style-type: none"> • create the organisational chat • notify managers when their direct reports receive a shout-out
PhotoURL	Public URL of user's profile photo	String	If the user's profile photo can be retrieved from a public URL, we will retrieve it from there.
PhotoFilename	Local path to user's profile photo	String	If the user's profile photo can be retrieved from the same location as the import CSV/Excel file, we will use this path to retrieve it from there. The photo filename should be FirstName.LastName or match the user's ID. Accepted file types are .png or .jpeg
DateOfBirth	Date of birth	YYYY-MM-DD	If provided, Workvivo can issue automated birthday posts. Each user can opt out of birthday posts if they wish
LeaveDate	Leave date	YYYY-MM-DD	If present and if this is a date in the past, we will deactivate the user account if it is currently active.

Note: Both the PhotoURL and PhotoFilename columns are not required unless you are sending some profile photos via a public URL and others as a local path.

If we have already imported a profile photo for a user, we will not attempt to import it again unless the PhotoURL or PhotoFilename value is different to the value when we originally imported it. If an updated user profile photo needs to be sent to Workvivo, please change the path of the PhotoURL or PhotoFilename as otherwise it will be ignored.

As mentioned previously, if there are any additional columns in the file that are not used in Workvivo, we will ignore this data.

2.4. Group configuration

Prior to import, it's important for us to configure the group types that will be sent in the file, otherwise group columns will be ignored. To do this, we need a list of the group types to be sent to us in advance of the first import.

2.5. Handling of deactivated users

The default Workvivo configuration operates on the basis that a complete list of current active users is sent to us. As such, we will analyse the import file to determine:

- What new user records need to be created
- What existing user records need to be updated
- What existing user records need to be deactivated

By default, we determine what records should be deactivated on the basis of omission. In other words, if a user is set up in Workvivo, but is not present in the import file, we will deactivate their account. We will also deactivate users if a LeaveDate column is included in the file and if this date is in the past.

Note that if more than 5% of users would be deactivated based on the file contents, we will skip deactivating users and manually investigate if so many users should be deactivated.

3. File transport and scheduling

We are very flexible on the approach taken for how to transfer files from a third-party system to Workvivo. We support most modern transport mechanisms out-of-the-box. Our preference is for the file to be placed in a location owned and controlled by the third-party vendor, but we can provide an Amazon S3 bucket where files can be placed if required. If you opt to utilise the Workvivo Amazon S3 bucket once the file has been imported we will remove and delete the file from the S3 bucket, resulting in the data remaining on our S3 bucket only for the required time period.

3.1. Supported transport mechanisms

Workvivo supports automated retrieval of files over any of the following transport mechanisms as standard, without modification required:

- HTTPS (with Basic Authentication)
- SFTP
- WebDAV
- Amazon S3 and S3-compatible cloud storage vendors

***Note:** we do not support retrieving files over unencrypted transport channels such as HTTP or FTP. We also do not support retrieving files over any channel that does not require some form of authentication (with the exception of importing profile photos via public URLs).*

If you need to transfer files over a mechanism not listed above, please let us know.

3.2. Credentials storage

All credentials for accessing files (e.g. SFTP account usernames and passwords) are encrypted in the Workvivo database using the AES-256-CBC cipher and MAC signing.

3.3. File naming

To avoid issues where a file doesn't exist if the export on the third-party system failed for some reason, or where there is a synchronisation issue with time zones or date formatting, we prefer to use an approach where the same file is overwritten daily rather than storing multiple files and using timestamps to designate which file is the latest copy.

As for the filename itself, we don't have any specific requirements although we do request that usage of filenames with spaces is avoided.

3.4.Frequency and scheduling

Workvivo can be configured to download and import files from once an hour to once a day and anything in between. We can also schedule imports to happen at specific hours of the day. We will typically schedule imports to run 2 hours after they are scheduled to run on the source system.