O.C.Tanner

thanks℠

Data Provisioning Automation

Version: 1.3.0

Overview

Thanks (https://www.thanks.com) is a cloud based Rewards and Recognition solution by O.C. Tanner which helps organizations to amplify the culture of recognition. Data provisioning is one of the key processes to launch this initiative and maintain the user in sync with the core HRMS systems and this document gives a high level requirement of the automation process.

Data Provisioning

There are two ways of auto-provisioning the data on thanks platform. Data can either be shared in an excel file with the required data attributes or via REST based API which is consumed through a pull request by us.

API based approach is recommended as it has less moving parts.

File based integration

In this approach, the client can post an excel file with the required data attributes. The client can use one of the following:
- Upload the file to our SFTP server account
- Upload the file on their own SFTP server and share the access details with us.

System will fetch the file and run a data processor to provision the data.
In this approach, the client provides the full data of active employees and our data processor parses the data to identify inactive and new employees. All the required data attributes mentioned later in the document should be provided while sharing the file.

A sample excel file is present at
https://cdn.kwench.com/kudos/p/assets/templates/data_Integration_template.xlsx

API integration

In this type of integration a REST API is exposed by the client which is pulled by our system at predefined intervals.

- API should be exposed on HTTPS with restricted IP access for security.
- Thanks system will invoke the API to process the data for a given period
- In case API is unavailable, processing will be aborted and will resume on the next scheduled time. An email regarding the same will be triggered to take corrective action.
- O. C.Tanner will share the IP addresses on which access should be provided

- Client to share production URL before making the integration process live.

Sample API Format

The sample API endpoint contains some sample data and structures how the output and api structure should look like. https://api.myperks.in/v2/sample/automation/data

Example Json Output format

```
[
    {
            "first_name":"User 1",
            "last_name":"A",
            "email_id":"abc@example.com",
            "employee_id":"12345",
            "designation":"Sales Executive",
            "department":"Sales",
            "gender":"F",
            "date_of_birth":"02-17",
            "date_of_joining":"2021-05-01",
            "reporting_manager_employee_id":"68962",
            "city":"Noida",
            "location":"Noida O1",
            "unit_name":"Sales",
            "unithead_employee_id":"45267 ",
            "country":"IND",
            "grade":"L1",
            "legal_entity":"OCT India Ltd"
    },
    {
            "first_name":"User 2",
            "last_name":"B",
            "email_id":"xyz@example.com",
            "employee_id":"67890",
            "designation":"Associate Developer",
            "department":"IT",
            "gender":"M",
            "date_of_birth":"09-15",
            "date_of_joining":"2019-10-23",
            "reporting_manager_employee_id":"63262",
            "city":"Hyderabad",
            "location":"Hyderabad HQ",
            "unit_name":"Technology",
            "unithead_employee_id":"75662",
            "country":"IND",
            "grade":"L2",
```

```
            "legal_entity":"OCT India Ltd"
        }
]
```

Data Attributes

This section provides the list of all data attributes some of which are mandatory for integration and the options attributes are provided as per the configuration setup done for the client.
For example, if a client needs to generate a Long Service Anniversary reward then sharing the Date of Joining is required.

Field	Required	Remarks	JSON field name	Json type
Employee Id	Mandatory and Unique	This should be a unique value for the lifecycle of each employee in the organization.	employee_id	String
First Name	Mandatory		first_name	String
Middle Name	Optional		middle_name	String
Last Name	Mandatory		last_name	String
Email Id	Mandatory and Unique	Email of employee. In case a new email is received with same employee Id, it will be updated during processing	email_id	String
Location	Optional	Required for MIS purpose	location	String
City	Optional	Required for MIS purpose	city	String
Country	Optional	Mandatory in case of international user base. Please share country code in ISO Alpha 3 format e.g. IND for India, ESP for Spain	country	String
Department	Optional	Required for MIS purpose	department	String
Designation	Optional	Required for MIS purpose	designation	String
Grade	Optional	Required in cases where grade specific rewards are present. Also add this information in Analytics	grade	String
RM Employee Id	Mandatory	Reporting Manager(RM) Employee Id is required to create the reporting hierarchy for approvals and notifications (e.g. email cc config)	reporting_manager _employee_id	String
Business Unit	Mandatory	Required for budget calculation and MIS	unit_name	String

Business Unit Head Employee Id	Mandatory	Required for approval of rewards where BU Head is approver and show analytics/MIS at BU Level	unit_head_employee_id	String
Date of Birth	Optional	Mandatory if client wishes to enable auto wishes/auto rewards on Birthday of employees. Only date and month part to be shared.	date_of_birth	String mm-dd
Date of Joining	Optional	Mandatory if client wishes to enable Service anniversary related wishes and rewards	date_of_joining	String yyyy-mm-dd format
Gender	Optional	Required for MIS purpose. Data should be given in the form "M" or "F"	gender	String
Legal entity	Optional	If client has multiple legal entities which is used for independent budgeting	legal_entity	String

Data Provisioning Steps

The following steps are performed at the time of automatic data provisioning

Data Validation

The first step is to parse and verify the data which includes the following:
- Correct format of data fields such as email/date/mobile number
- Presence of duplicate email/employee_ids in the data
- Valid reporting manage Employee Id/Business Unit Head Employee Id/Business Unit Name

User Deactivation

The employees which are not present in the validated and verified data are deactivated in thanks. This will prevent them from logging in to thanks.

New User Registration

The new users who are present in the verified and validated data are added to thanks and an email with account details is sent to them.

The feature to send email is configurable and can be disabled on request of the client.

Existing User Update

The data of existing employees is updated based on two parameters:
- If there is a change in any attribute
- The data attribute is configured for update

Clients may opt out to update any specific field (key information which may affect budgets like DOB, DOJ via auto rewards) during the update process, but this information will always be added in thanks whenever a new employee is added.
- User roles/access are updated based on configured rules for all the users. The role information would not be a part of the employee data.
- Business Unit Head/Business Unit Head Id can also be calculated from some inherent logic defined for the integration process.

Business Unit Creation

Any new Business Unit found in the employee data can also be created automatically with the Business Unit Head as the owner of the new unit. Budget allocation for this new unit can be done from thanks.

Data Provisioning Status

The client will provide an email on which the status of the processing is sent.
On the same emails alerts will also be sent if the file/API is unavailable.

A sample email is shown below:

Data Automation Summary for 02 Apr 2021 Inbox ×

Thanks <notifications@thanks.com>   Apr 2, 2021, 4:05 AM
to me,

Data processing stats for 02 Apr 2021

New Registration : 2
Deactivation : 1
Update : 17