

**CORPORATE SOCIAL RESPONSIBILITY**

# HR Feeds



# Meet your Trainer...

## Zoey Lake

Senior Training Specialist

Corporate Social Responsibility



# Agenda

1. Overview
2. Transmission
3. Feed Processing
4. Required Fields
5. Optional Fields
6. Company Fields
7. Data Sample
8. Error Protocol
9. What We Need from You



The Human Resource (HR) data feed is how we get demographic information pertaining to your employees in order to verify employment and establish employee programs within the Bonterra CSR system on a regular and automated basis.

# Transmission

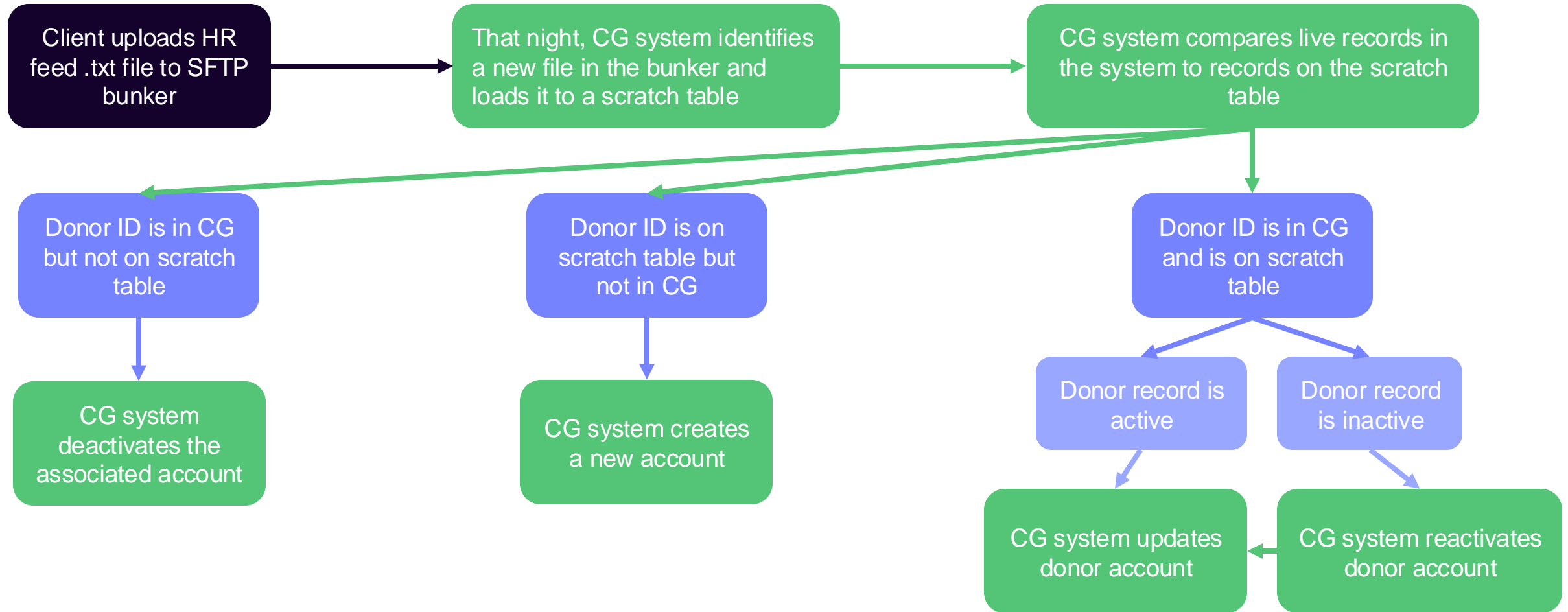
## SFTP Bunker

- Secure File Transfer Protocol
- Hosted by Bonterra (unless you have your own that you'd prefer to use)
- A username and password will be issued to you
- Within the subdirectory (folder) assigned to your account, the file will upload to a subdirectory designated for this feed
- Cadence is up to you!

## Format

- Flat file (NOT a delta file) uploaded to the bunker on a regular, pre-determined schedule
- The system will check the bunker on a nightly basis and ingest any new files
- All fields in the specified layout are expected on the file, even if you never use them

# Process



# File Layout Samples

# Required Fields

Field	Description	Example	Notes
Record Type	Whether the row is a header, trailer, or actual data detail record	'H' or 'D' or 'T'	Record will not load without this field
Grantmaker ID	Your entity's client ID number in the Bonterra-CG system	GrantmakerID	Static value; record will not be linked to your organization without this field
HR Source	Your HR vendor	'ADP' , 'Workday', etc.	File may have issues loading without this field
Donor ID	The employee's ID number in your HR system	'TSMITH' or '2034830'	Must be unique to the employee
Donor Code	The ID that you'll be using for SSO	'TSMITH' or '2034830' or tsmith@company.com	Can be the same as Donor ID, but must be unique to the employee

Null values sent on these fields will result in the record getting errored out.  
Null values sent on any other fields will not result in the record getting errored out, but they may still be functionally necessary to support your program.



# Optional Fields

Field	Description	Example	Notes
First Name	The employee's legal first name	'Thomas'	Strongly recommended
Last Name	The employee's legal last name	'Smith'	Strongly recommended
Middle Name	The employee's legal middle name	'Marie', 'S', etc.	Cannot be overwritten by a null value
Employee Type	How the employee is categorized with respect to any category critical for programmatic functionality	'Employee', 'Director', 'Retiree', etc.	Categories critical for proposal type access or matching limits
Number of Annual Pay Periods	The number of paychecks the employee receives in a year	12 or 24 or 26 or 52	Functionally required for payroll integrations
Default Currency	The employee's default currency	'USD', 'CAD', 'GBP', etc.	Functionally required for multicurrency programs
Prefix	How the employee should be addressed	'Mr.' 'Ms.', 'Dr.' etc.	
Suffix	The suffix on an employee's name	'Jr.' 'III', etc.	

# Optional Fields

## File Layout (cont'd)

Field	Description	Example	Notes
Title	The employee's official position at the company	'Regional Manager', 'Director', 'Summer Intern', etc.	
Manager ID	The employee ID number of the individual to whom the employee reports directly	'DJONES'	Only send if programmatically necessary
Team	The employee's team within the program	Lorem ipsum dolor sit amet, consectetuer	Only send if programmatically necessary (i.e. there will be team-based competitions or leaderboards)
Birthdate	The employee's birthdate	'04241974'	Not recommended (employee privacy concerns)
Hire Date	The date on which the employee was hired	04/15/2023	
Termination Date	The date on which the employee was terminated	06/15/2023	Populating the termination date does NOT deactivate the employee's account

# Optional Fields

## File Layout (cont'd)

Field	Description	Example	Notes
Telephone	The employee's home telephone number	'2021234567'	Not recommended (employee privacy concerns) Cannot be overwritten by a null value
Fax	The employee's home fax number	(555) 234-8765	Cannot be overwritten by a null value
Email Address	The employee's work email address	<a href="mailto:jsmith@company.com">jsmith@company.com</a>	Strongly recommended
Mail Code	The employee's inter-office mail identifier	'1340', 'P4-P184-01-1'	Cannot be overwritten by a null value
Department	The employee's department at the company	'Finance', 'Development', 'Sales', etc.	Cannot be overwritten by a null value
Home Address	The first line of the employee's home address	1234 Homestead Dr.	Not recommended (employee privacy concerns) Cannot be overwritten by a null value

# Optional Fields

## File Layout (cont'd)

Field	Description	Example	Notes
Home Address 2	The second line of the employee's home address	Apt 102	Not recommended (employee privacy concerns) Cannot be overwritten by a null value
Home City	The city of the employee's home address	'Boston', 'Arlington', etc.	Not recommended (employee privacy concerns) Cannot be overwritten by a null value
Home Zip	The zip/postal code of the employee's home address	'48105', '14687', etc.	Used for volunteer event searches
Home State ID	The 2-character code for the US state of the employee's home address	'MI', 'MA', 'TX' etc.	Used for volunteer event searches Must be 2-character code Cannot be overwritten by a null value
Home Province	The province of the employee's home address	'Ontario', 'Goa', 'British Columbia', etc.	Cannot be overwritten by a null value
Home Country ID	The 2-character code for the country of the employee's home address	'US', 'CA', 'UK', etc.	Must be 2-character code

# Optional Fields

## File Layout (cont'd)

Field	Description	Example	Notes
Pay Cycle	How often the employee receives a paycheck	'Weekly', 'Biweekly', 'Monthly', etc.	For ease of filtering; not programmatically necessary
Preferred First Name	The employee's preferred first name	'Tom'	Cannot be overwritten by a null value
Preferred Last Name	The employee's preferred last name	'Stevens'	Cannot be overwritten by a null value

# Optional Custom Fields

You are able to add up to 10 custom fields to your HR feed in case you need to capture information that is not a part of our standard data set.

## List Values

- Up to 6 fields
- Anything where there are a discrete and finite number of possible values that will be sent over
- New values that appear on the feed will be added to the dropdown of possible values in the interface
- Any difference (characters, spaces, capitalizations, etc.) will result in the generation of a new list value

## Numbers

- Up to 2 fields
- Anything that will always be numeric

## Text

- Up to 2 fields
- Anything where it's possible the value sent will usually be different for each employee
- Data points where there are a finite number of possible values, but the number of possible values exceeds ~100

# Company Fields

Field	Description	Example	Notes
Company	The company/subsidiary/office name	'Store 1234' , 'Dallas 5678', 'Subsidiary Name', etc	
Office Address	The first line of the company/subsidiary/office address	'123 Main St.'	
Office Address 2	The second line of the company/subsidiary/office address	'Suite 7B'	
Office City	The city in which the company/subsidiary/office is located	'Boston'	
Office State ID	The two-character code for the US state in which the company/subsidiary/office is located	'MI', 'MA', 'TX' etc	
Office Province	The province in which the company/subsidiary/office is located	'Ontario', 'Alberta', 'Goa', etc.	
Office Zip	The postal code in which the company/subsidiary/office is located	'48105', '14687', etc.	
Office Fax	The company fax number	(555) 123-9876	
Office Country ID	The two-character code for the country in which the company/subsidiary/office is located	'US', 'CA', 'UK', etc.	

# To keep in mind with Company Fields

- These fields do not populate the employee's profile/account, they populate the 'Company' table on the back end
- If any employee's record on the feed contains a SET of Company fields that deviates in any way from the SET of Company fields on another employee's record, then the employees will be linked to different company records in the system.

## Example:

- Company Jones has an office in New York and an office in Chicago
- Tom Stevens and Bob Smith are both employees of Company Jones, but Tom is at the New York office and Bob is at the Chicago office
- Tom's record has 'Company' = Jones and 'Office City' = New York
- Bob's record has 'Company' = Jones and 'Office City' = Chicago
- Two companies called Jones are created in the system. One that is in New York and one that is in Chicago.
- Tom and Bob are linked to these separate companies accordingly



# Mini Data Sample

## Header Record

H|Grantmaker ID|HR Source|Donor ID|Donor Code|First Name|Middle Name|Last Name|Prefix|Suffix|Employee Type|Title|Manager ID|Team|Number of Annual Pay Periods|Default Currency|Birthdate|Hire Date|Termination Date|Telephone|Email Address|Office Address|Office Address 2|Office City|Office State ID|Office Province|Office Zip|Office Country ID|Company|Mail Code|Department|Home Zip|Home State|Home Country ID|Custom List 1|Custom List 2|Custom List 3|Custom List 4|Custom List 5|Custom List 6|Custom Number 1|Custom Number 2|Custom Text 1|Custom Text 2|Pay Cycle|Preferred First Name|Preferred Last Name

## Detail Record #1

D|9652|SAP|1234567890|1234567890|John|S|Smith|Mr||Active||yyyy|26|USD|12311960|01012000||5159999999|john.smith@xxx.com|1 Main Street||Boston|MA||02101|US|Company Name|A1234|Agriculture|02101|MA|US||||||||||

## Detail Record #2

D|9652|SAP|1234567890|1234567890|Jane||Smith|Mr||Active||yyyy|26|USD|12311960|01012000||5159999900|jane.smith@xxx.com|1 Main Street||Andover|MA|01801|US|Company Name|A1234|IT|02101|MA|US||||||||||

## Detail Record #3

D|9652|SAP|1234567890|1234567890|Mark|W|Weiner|Mr||Active||yyyy|26|USD|12311960|01012000||5159999988|mark.weiner@xxx.com|1 Main Street||Marshfield|MA||01804|US|Company Name|A1234|Agriculture|02101|MA|US||||||||||

## Trailer Record

T|3|201812301245

# Error Protocol

# Record Rejection

## Record Rejection

- In these cases, the records with errors will fail to load and trigger error emails to the distribution list but the rest of the records will still load
  - A corrected file can be sent on a subsequent file as early as the next day
- Donor ID
  - If the Donor ID field is null on any one record, the record will not be loaded into the system
  - If any Donor ID on the file identical to the Donor ID on any other record on the file), the record will not be loaded into the system
- Donor Code
  - If the Donor Code field is null on any one record, the record will not be loaded into the system
  - If any Donor Code on the file is not unique (i.e. if it is identical to the Donor Code on any other record on the file), the record will not be loaded into the system

# File Rejection

File Rejection will typically happen for one of two reasons:

## File Corruption

- If the file is corrupted and we cannot open it, an error email will be sent to the distribution list and HR will need to resend the file immediately

## Incorrect formatting

- If the data isn't formatted properly and we cannot properly load it onto the scratch table, an error email will be sent to the distribution list and HR will need to resend the file immediately

What we need from you

# Business Objectives

- How often will do you plan on uploading a file to the bunker?
  - Frequency?
  - Date/time?
- What pieces of employee information are important to leverage in your programs that are not covered on the standard layout?
- Will access to any specific programs be dependent on an employee's belonging to a particular group?
- Are there any pieces of demographic information you'd like available in the system for reporting purposes that are not covered on the standard layout?

When the spec is settled, we'll need your explicit approval over email to move the project to the development input queue

# Technical Objectives

- Confirmation that compilation of a pipe delimited .txt file is feasible for you
- Confirmation that a UTF-8 character set is feasible for you
- Whether you'd like to add PGP encryption to your transmission
- An error email distribution list
  - Can be a single address, set of addresses, or listserv
- Will the file be in UNIX or DOS format?

We'll need a test file as soon as we start development (currently slated for MM/DD).

# Feedback & Training Survey

Please fill out the survey (link in chat or scan QR code):

