PeopleFluent Talent Management Integrations 25.07 Control Data Guide API Version 1.37.241100

Document Version: 1.0

Contents

Introduction

This document is intended to provide guidance regarding the loading of Control Data into the PeopleFluent Talent Management application. The functional consultant and the client will use this as part of the initial and on-going data discussions during the implementation.

This document focuses primarily on customers with full control data integrations, but also provides information on common features.

Document Revision

This section lists any changes or updates that occur following initial publication.

Table 1: Document Revision

Revision Information	
Revision Date	June 16, 2025
Document Version Number	1.1
Details of Revision	Update sFTP Site URLs for Integrations Transferring Files.

What is Control Data?

Control Data is the data the customer provides to infuse the PeopleFluent Talent Management System with customer-specific data. This data may also be commonly referred to as foundation or setup data.

Master File Set

Common Features

The full set of PeopleFluent Control Data specifically consists of the following distinct files for flat files/Excel one-time feeds (clients not using XML). Not all clients will need to provide every file. The specific file set for a given customer is a function of the module(s) the customer is implementing as well as the nature of their programs and needs.

Control Data Files

New Releases

When the new Talent Management versions are released, there may also be enhancements or changes to the version of Control Data feeds that correspond to the enhancements of the product. A customer may continue to use their existing feed version on their current corresponding Talent Management application version, but when the client upgrades to the next version, the feeds should be re-evaluated to determine if any changes are needed.

Format

The table below provides the load order, file name, and a brief description of each file. The file name also corresponds with the precise name required on each feed in the Document Name field on the file.

Files must be loaded in a **specific order** due to interdependencies. Therefore, they should only be sent to PeopleFluent in a specific order given the nature of the file transfer protocols used.

Also, all files must be **sorted** based on the SSRK field in each file which is the 6th column on every file **. See further info on the definition of SSRK below.

**Except any files noted below which have a unique sort recommendation.

Table 2: Load Order

Load Order	File Name	Description
1	Pictures and Attachments	Allows a customer to provide pictures for Employees who appear in the employee organization chart. Also, allows customers to load resumes for the Recruiting module and Performance Ratings for the Performance module. Pictures and Attachments do not have a flat file template. See the File Format section for more detail.
2	AuthoriaAssessmentLibraries	Assessment libraries contain the Qualifying Questions presented to the candidate when he or she applies to a job. This is rarely a continuous, automated feed/integration.
3	AuthoriaUserEnums	Allows the customer to provide individual values for a particular selection list. Feed can include translations for multiple languages. This is rarely a continuous, automated feed/integration.
4	AuthoriaUserEnumsWithValues	Allows the customer to provide the individual values for a particular selection list. This is rarely a continuous, automated feed/integration.
5	AuthoriaPersons	Allows the customer to provide name and contact information for individuals in their organization. Persons are always provided by the customer.
6	CandidateProfiles	Allows the customer to provide additional personal information for Contacts and Talent Profiles. The fields include such information as age, gender, and race. This file should be provided if data is used in compensation calculations, eligibility, etc. For recruiting purposes, customers may send the CandidateProfiles file for non-employees, the purpose of which is to create records for active candidates for requisitions (establishing Contacts).
7	CandidateProfileWorkHistory	Accompanies the Candidates feed and allows customers to provide previous employment history for Employees and Contacts.
8	CandidateProfileEducation	Accompanies the Candidates feed and allows customers to provide previous education history for Employees and Contacts.
9	CandidateProfileLanguages	Accompanies the Candidates feed and allows customers to provide multiple Spoken and Written Languages for Employees and Contacts.

Load Order	File Name	Description
10	AuthoriaEmployees	Individuals with an employee record will show up in the various selection lists throughout PeopleFluent Talent Management. Employees are always provided by the customer. This should not be used if the customer is using the EmployeeEmploymentHistory feed.
11	AuthoriaUsers	Controls a person’s access to PeopleFluent Talent Management. Users are always provided by the customer.
12	AuthoriaSalaryGrades	Allows the customer to associate a min, mid, and max salary value with Jobs and Positions.
13	(Deprecated) AuthoriaOrganizations ** (without parent organizations or with file sorted highest level to lowest level)	Organization Feed 13 is deprecated and no longer necessary as of TM version 22.04. This feed can be and should be disabled in the integration layer for older integrations that were implemented previous to TM version 22.04.
14	AuthoriaOrganizations ** (with parent organizations)	Provides a means for the customer to reflect their organization hierarchy in the PeopleFluent Talent Management System. Organizations are always provided by the customer. Customers should send feeds with parent orgs in hierarchical format. However, Peoplefluent can configure the system to sort the Organizations file based on hierarchy.
15	AuthoriaJobs	Allows the customer to provide information which may be common to a class of similar jobs. This is also sometimes referred to as the Job Code feed. Jobs are always provided by the customer.
16	AuthoriaJobPostingInfo	Allows the customer to provide Posting information, Notifications, and Assessment Libraries for Internal, External, and any additional posting channels.
17	AuthoriaPositions	Allows the customer to provide individual seat information to PeopleFluent. Positions may be occupied or vacant. This information is not only used to provide the customer with a means to quickly create a requisition, but is also used to populate the actionable organization charts. As of 10.3, for the org chart feature to work properly, the customer must specify a Managed By Position in this data feed. Positions are optional, but required for the org charting feature. Should not be sent if the customer is using the EmployeeEmploymentHistory feed.
18	AuthoriaPositionHolderHistories	Allows the customer to specify a historical view of the PositionHolders for the Position.

Load Order	File Name	Description
19	AuthoriaEmployeeStatusHistories*	Accompanies the AuthoriaEmployeeEmploymentHistory feed and allows customers to provide a historical view of an employee's status history.
20	AuthoriaEmployeeEmployment History*	Allows the customer to provide Employee, Org Chart, and historical internal employment data in the same feed. The data in this feed is used to populate the org chart for those customers who do not have a formal position management system in place. Customers who utilize this feed should not provide the Employee and Position feeds. This feed should be sorted in Ascending Date order. Also, please note that when supplying Beginning and End Dates there should not be a gap in the dates provided. The End Date of the previous row should match the Start Date for the next successive history row for an employee.
21	AuthoriaEmployeeHRRelationships	Defines a relationship between an HR representative and an employee within the company. The relationship controls the information to which the HR representative has access. The HRRelationships files can be sent in combination with one another, based on how the customer wants to give permissions to the employees for HR representatives.
22	AuthoriaPositionHRRelationships	Defines a relationship between an HR representative and a position within the company. The relationship controls the information to which the HR representative has access. The HRRelationships files can be sent in combination with one another, based on how the customer wants to give permissions to the employees for HR representatives.
23	AuthoriaOrganizationHRRelationships	Defines a relationship between an HR representative and an organization node within the company. The relationship controls the information to which the HR representative has access. The HRRelationships files can be sent in combination with one another, based on how the customer wants to give permissions to the employees for HR representatives.
24	AuthoriaEmployeePerformanceRating Histories	Allows the customer to load historical performance rating information for employees.

Load Order	File Name	Description
25	AuthoriaCompetencyLibraries	Allows the customer to fully specify a collection of competencies. The collection of competencies, from top to bottom, is subdivided into a library, competency groups, and finally competencies (which have behaviors). After competencies have been loaded as part of a library, they may be referenced by a DevelopmentPlanActivityCatalog (below).
26	AuthoriaDevelopmentPlanActivity Catalogs	A development catalog represents a list of activities or training courses to which competencies can be associated.
27	AuthoriaEmployeeIncentiveTarget	Use for supplying miscellaneous numerical data for use in compensation plans calculations. This can include things like eligible earnings, individualized incentive target amounts or percents, and so on.
28	AuthoriaEmployeeIncentivePlanCode	Use to supply miscellaneous codes (alphanumeric) for use in compensation plan eligibility.
29	AuthoriaProcessHierarchy	Alternate compensation worksheet allocation hierarchy.
30	AuthoriaOrganizationGoals	Organizational goals are set to communicate strategies and drive business results across the company.
31	AuthoriaPerformanceGoals	Performance goals are the set of goals set by an Employee who is a part of a Performance Plan.
32	AuthoriaPerformanceGoalResults	Allows customers to load Results for the Performance Goals.
33	AuthoriaSlateMembers	The SlateMember entity corresponds to the Successor in the PeopleFluent Talent Management UI. This is a person who has been assigned to a slate of people considered to be replacements for a position holder. Each slate is comprised of multiple slate members each of whom has a rank and other identifying information.
34	AuthoriaEmployeeBenefitHistory	Allows customers to provide a history of Benefits for an employee.
35	AuthoriaEmployeeBonusHistory	Allows customer to provide a history of Bonus data for an employee.
36	AuthoriaEmployeeSalaryHistory	Historical salary data including current salary record. Needs a minimum of one current salary record. This file is required if an employee's Salary will be used in any bonus or stock program calculations (budget, bonus award, and so on) or if the customer is doing salary planning.
37	AuthoriaEmployeeStockHistory	Historical stock history. Requires setup of Stock plan prior to import.
38	AuthoriaMarketData	Allows customer to import market data.
39	AuthoriaPostionOpenings	Allows customer to load Open Requisitions into the PeopleFluent Talent Management system.

Load Order	File Name	Description
40	AuthoriaPostionOpeningsPostingInfos	Allows customer to load PostingInfo channel information to the PostionOpenings.
41	AuthoriaTalentCountriesWorkedIn	Allows the customer to provide a list of countries where an employee has previously been employed.
42	AuthoriaTalentCountryPreferences	Allows the customer to provide a list of countries where an employee would prefer to work.
43	AuthoriaTalentExperienceInventory	Allows the customer to provide a list of areas of experience for the employee.
44	AuthoriaTalentGlobalExperience	Allows the customer to provide both Category and Detailed Experience Areas for employees.
45	AuthoriaTalentProfileAssessment	Allows the customer to provide talent assessment information for employees, including suitability, promotability, loss impact, etc.
46	AuthoriaTalentTravelAndMobility	Allows the customer to provide travel and mobility work preferences for employees such as Willingness to Relocate and Acceptable Regions and Amounts of Travel.
47	AuthoriaLicenseOrCertificationDetail	Allows the import of information about licenses and certifications for a particular employee or job.
48	AuthoriaEvaluation	Allows the customer to provide evaluation details for participants on performance plans.
49	AuthoriaEvaluationCompetencyRating	Allows the customer to provide Competency Ratings for the participants in performance plan evaluations.
50	AuthoriaEvaluationGoalRating	Allows the customer to provide Goal Ratings for the participants on the Evaluation performance plans.
51	AuthoriaEvaluationOverallRating	Allows the customer to provide an Overall Rating for participants in the performance plan evaluations.
52	AuthoriaEPMDevelopmentPlan	Allows the customer to provide EPMDevelopmentPlans.
53	AuthoriaEPMDevelopmentItemMetrics	This feed must be used in association with the EPMDevelopmentPlan feed and allows the customer to attach individual metrics for development items.
54	AuthoriaJobCompetencies	Allows the customer to provide Job Competencies for the application.
55	CandidateProfileReferences	Allows the customer to provide References for the Candidates.
56	AuthoriaBudget	Allows the customer to provide budget allocations for salary planning.
57	AuthoriaBudgetHoldbacks	Allows the customer to provide budget holdbacks for salary planning.
58	AuthoriaLookups	Allows the customer to provide Lookup functionality for Salary and Performance Plans and Reward Cycles.

Load Order	File Name	Description
59	AuthoriaSalaryPlanParticipant	Allows the customer to import salary planning data into salary plans.
60	AuthoriaWritingAssistant	Allows the customer to import Writing Assistant data for the competencies and categories like Goal, Overall Comments, etc.
61	AuthoriaExchangeRates	Allows customers to enter Exchange Rates.
62	AuthoriaTranslations	Allows customers to enter language Translations for text strings.
63	AuthoriaCareerPathData	Allows customers to create/edit/delete User Type career path records.
64	AuthoriaGoalDimensionsForGoal	Allows customers to add or update goal dimensions for goals in the goal repository.
65	AuthoriaSourceSysRefKeyChanges	Allows the customer to update the SourceSysRefKeys for certain entities.
66	CustomFieldsPersons	Allows customers to send Person Custom Feeds without any of the other Person data.
67	CustomFieldsEmployees	Allows customers to send Employee Custom Feeds without any of the other Employee data.
68	AuthoriaTestResults	Allows customers to populate Test Results for the CandidateProfile records.
69	AuthoriaCoachingTopicLibrary	Allows customers to add coaching topics with multi-lingual content.
70	AuthoriaCoachingTopicLibraryPages	Allows customers to specify specific pages for Coaching Topic Libraries.
71	AuthoriaCoachingTopicLibraryRoles	Allows customers to specify specific roles for Coaching Topic Libraries.
72	AuthoriaCoachingTopicLibrary Associations	Allows customers to enter associations between coaching topics and other coaching topics, help topics, and video topics.
73	AuthoriaJobEssentials	Allows customers to add Job Essentials.
74	AuthoriaJobEssentialToJobAssociation	Allows customer to link the Job Essentials to the specific Jobs.
75	AuthoriaPerformanceDelegations	Allows customer to add Performance Delegations to Performance Plans.
76	AuthoriaClearPerformanceDelegations	Allows customer to clear Performance Delegations from Performance Plans.
77	AuthoriaEvaluationTalentAssessments	Allows the customer to provide a Talent Assessment for participants on the performance plan evaluations.

* Starting with 10.14 the recommended file order has changed from Employee Employment History (EEH) before Employee Status History (ESH) to ESH before EEH. NOTE: The file order change is also recommended for previous API versions.

In addition, to address a customer-reported defect, the EEH feed has tightened its validation so when processing an inactive employee, employment history that includes a current employment instance will be rejected as invalid. The error message reported is:

```
A current employment instance cannot be loaded for Employee [SSRK=%s]
because they are currently inactive
```

Customers receiving this error message are advised as follows:

Customers that feed employment history for inactive employees need to start passing the end date on the last employment instance for the inactive employee in order to update the employment history for inactive employees.

Customers who have not yet changed the order of their feeds may see the error message for "new" employees because the ESH hasn't updated the status to "Active" yet. In this case, they should be able to reprocess EEH for that employee after ESH has run to make the employee active.

Table 3: File Sorting

Feeds	SortField1	SortField2	SortField3
AssessmentLibraries	AssessmentLibrarySSRK		
Budget	WorksheetRun	BudgetElement	
BudgetHoldbacks	WorksheetRun	BudgetElement	
CandidateProfile	Sorting not required		
CandidateProfileEducation	CandidateSSRK		
CandidateProfileLanguages	CandidateSSRK		
CandidateProfileReferences	CandidateSSRK		
CandidateProfileWorkHistory	CandidateSSRK		
CareerPathData	JobSSRK		
ClearPerformanceDelegations	Sorting not required		
CoachingTopicLibrary	SSRK		
CoachingTopicLibraryPages	SSRK	Title	
CoachingTopicLibraryRoles	SSRK	Title	
CoachingTopicLibraryAssoc.	SSRK		
CompetencyLibrary	SSRK	CompetencyGroupSSRK	
CustomFields-Employees	EmployeeSSRK		
CustomFields-Persons	PersonSSRK		
DevelopmentPlanActivity Catalog	SSRK		
EmployeeBenefitHistory	EmployeeSSRK		
EmployeeBonusHistory	EmployeeSSRK		
EmployeeEmploymentHistory	EEHistorySSRK	EmploymentStartDate (ascending)	
EmployeeHRRelationships	ManagedEmployeeSSRK		
EmployeeIncentivePlanCode	EmployeeSSRK		
EmployeeIncentiveTarget	EmployeeSSRK		
EmployeePerformanceRating History	EmployeeSSRK		
Employees	EmployeeSSRK	EmployeeStatusStartDate (ascending)	

Feeds	SortField1	SortField2	SortField3
EmployeeSalaryHistory	EmployeeSSRK	SalaryHistorySSRK	EffectiveDate (ascending)
EmployeeStatusHistory	EEHistorySSRK	EmployeeStatusStartDate (ascending)	
EmployeeStockHistory	EmployeeSSRK	StockHistorySSRK	GrantDate (ascending)
EPMDevelopmentItemMetrics	PersonSSRK	DevelopmentItemId	
EPMDevelopmentPlan	PersonSSRK		
Evaluation	Sorting not required		
EvaluationCompetencyRating	ParticipantSSRK	PerformancePlanSSRK	StartDate (asc), EndDate (asc), Completed On (asc)
EvaluationGoalRating	ParticipantSSRK	PerformancePlanSSRK	StartDate (asc), EndDate (asc), Completed On (asc)
EvaluationOverallRating	ParticipantSSRK	PerformancePlanSSRK	StartDate (asc), EndDate (asc), Completed On (asc)
EvaluationTalentAssessments	PersonSSRK	PerformancePlanSSRK	StartDate (asc), EndDate (asc), Completed On (asc)
ExchangeRates	Sorting not required		
GoalDimensionsForGoals	GoalSSRK	GoalCalendarSSRK	
JobCompetencies	JobSSRK		
Job Essentials	JobEssentialSSRK		
JobEssentialToJobAssociation	JobSSRK		
JobPostingInfos	JobSSRK		
Jobs	Sorting not required		
LicenseOrCertificationDetail	JobSSRK or EmployeeSSRK		
MarketData	Sorting not required		
OrganizationGoals	OrganizationSSRK	OrganizationGoalPlanSSRK	
OrganizationHRRelationships	ManagedOrganizationSSRK		
Organizations	Sort OrganizationSSRKs top-down if using ParentOrg SSRK field		
PerformanceDelegations	Sorting not required		

Feeds	SortField1	SortField2	SortField3
PerformanceGoalResults	PerformancePlanSSRK	ParticipantSSRK	StartDate
PerformanceGoals	PerformancePlanSSRK	ParticipantSSRK	
Persons	Sorting not required		
PositionHolderHistory	SSRK	StartDate (ascending)	
PositionHRRelationships	ManagedPositionSSRK		
PositionOpeningPostingInfos	PositionOpeningSSRK		
PositionOpenings	Sorting not required		
Positions	Sorting not required		
ProcessHierarchy	ProcessName		
SalaryGrades	Sorting not required		
SalaryPlanParticipants	Participant	SalaryPlan	StartDate (asc)
SlateMembers	Sorting not required		
SourceSysRefKeyChanges	Sorting not required		
TalentCountriesWorkedIn	PersonSSRK		
TalentCountryPreferences	PersonSSRK		
TalentExperienceInventory	PersonSSRK		
TalentGlobalExperience	PersonSSRK		
TalentProfileAssessment	PersonSSRK		
TalentTravelAndMobility	PersonSSRK		
TestResults	CandidateSSRK		
Translations	Sorting not required		
UserEnums	ListName		
UserEnumsWithValues	ListName	Locale	
Users	Sorting not required		
VerticalAndHorizontalLookupTable	(*) See instructions		
VerticalAndHorizontalLookup Data	(*) See instructions		
VerticalLookupTable	(*) See instructions		
VerticalLookupTableData	(*) See instructions		
WritingAssistant	Category	CompetencySSRK	

(*) See TM Data Mapping Document for further instructions.

Table 4: Most Common Feeds Used by Module

Feeds	Recruiting	Performance	Compensation
AssessmentLibraries	X		
Candidates	X	X	X
ExternalWorkHistory			
ExternalEducationHistory			
CompetencyLibrary	X	X	
DevelopmentPlanActivityCatalog		X	
EmployeeHRRelationships		X	
EmployeeEmploymentHistory	X	X	X
EmployeeStatusHistory	X	X	X
EmployeeBenefitHistory			X
EmployeeBonusHistory			X

Feeds	Recruiting	Performance	Compensation
EmployeeStockHistory			X
EmployeeSalaryHistory			X
EmployeePerformanceRating Histories		X	
Employees	X	X	X
Jobs	X	X	X
OrganizationHRRelationships		X	
Organizations	X	X	X
Persons	X	X	X
PositionHRRelationships		X	
Positions	X	X	X
PositionOpenings	X		
SalaryGrades	X	X	X
TalentAssessments	X	X	X
Translations	X	X	X
UserEnums	X	X	X
UserEnumWithValues	X	X	X
Users	X	X	X

File Feed Templates Documentation Conventions

For all customers using flat files or one-time Excel feeds (excludes XML users), PeopleFluent delivers a set of Excel spreadsheet templates.

Note: Non-integration customers will simply populate their data into the spreadsheets and return them to PeopleFluent.

The documentation conventions of the spreadsheets are:

- Blue: Required Field for the modules client is implementing.
- Violet: Optional Field. If no value is provided for a record, this field will not overwrite what is present in the application.
- Black: Optional Field. This field will always overwrite what is present in the application for a record.
- *: Field requires specific values determined by either a user enumerated list or a system enumerated list. See the entry for these fields in PeopleFluent Talent Management Data Dictionary to get information about valid standard values.

Source System Reference Key (SourceSysRefKey)

The Source System Reference Key (SSRK) is the external unique identifier PeopleFluent uses for a particular record. This identifier is intended to be a **customer-defined** identifier assigned to a particular record which will be unique to that record and will not change for that record.

This SourceSysRefKey allows PeopleFluent to determine whether or not the transaction received should be treated as an addition or an update. It is very important that careful thought be given when choosing a SourceSysRefKey for a particular record type. Attempting to assign a different SourceSysRefKey to an existing record will most likely result in a rejection of the data record, and will require manual intervention to correct.

This SourceSysRefKey is used by the Control Data Spreadsheets and is critical for integration customers.

“Kill & Fill”

Some feeds have subsets of fields within them that are treated as kill and fill. These fields are called Collections. What this means to the customer is that for the specific SSRK value passed in the latest delta file, the data within Talent Management will be entirely cleared/deleted just for the Collection (subset of fields), and only the data in the file will be added back to Talent Management. For an SSRK not passed within the delta file, nothing will happen to the records.

For the non-Collections fields in the file, those values will be UPDATED for whatever is in the file, even if it is a null value.

Custom Fields

The PeopleFluent database is designed to support client-specific custom fields.

Loading Data Using Custom Fields

The custom fields are added to the database initially through the User Interface (UI) and are loaded using the standard data loads.

Custom fields are linked to specific entities based on the file feed they are loaded on. Meaning, they are available to be added to a select set of specific, pre-defined forms within the application and also on specific smart grids. Please see the Data Mapping documents for the specific smart grids the custom fields appear on.

If a client is using the flat file layout (pipe or CSV delimited), it has been designed to allow for the import of a maximum of 10 per feed (50 for the PositionOpening feed). If the client requires more than this, the client will need to work with a functional consultant on how this is accomplished.

Placing a Custom Field

To place a custom field, navigate to **Site Configuration** > **Custom Fields** > **Custom Fields**. From here, clients can see the existing custom fields and add new ones. When adding a new one, there are some guidelines clients must follow. There cannot be any spaces in the name and the name must be in all lower case characters. Please see the online help for custom fields for additional details.

For ease of use, it is recommended that a standard naming convention be used creating custom fields. The fields should be prefaced with a client specific abbreviation followed by the name of the field. For example, pf_town, pf_function, pf_section where 'pf' is PeopleFluent.

Other Considerations

The placement of custom fields on any location/form should always be verified after any upgrade.

Unlike the User Defined Fields (UDFs) used on Salary, Bonus, Stock and Total Comp worksheets, custom fields are not available to be used in row level formulas. They are however available for display purposes within a worksheet.

Custom date formatting for custom date fields is not supported at this time.

Integrated Data

Integrations refers to continuous, automated integration of the client files into Talent Management without manual intervention. This is available to all clients as part of the implementation for the Control Data files.

For those customers who opt to not move forward with a continuous, automated integration, PeopleFluent provides a robust set of spreadsheets which can be used to load data instead.

Common Features

There are several features shared across the data loading process for integration customers. The features are documented below.

Character Set

Common Features

PeopleFluent Talent Management only supports the use of the UTF-8 character set.

File Formats

Files may be delivered in one of two formats: XML or flat files.

Common Features

Both kinds of files are able to be sent to PeopleFluent Talent Management in a secured manner and have more than one transmission method available for each. See the Transmission Methods section for a discussion on transferring files.

Delimited Flat Files

PeopleFluent Talent Management accepts a delimited flat-file. The standard field delimiter for PeopleFluent Talent Management is a pipe (|). In addition, PeopleFluent Talent Management also supports a CSV file with or without double quotes around the data. The record delimiter is configurable, although PeopleFluent recommends the use of the page feed character.

XML format

The Extensible Markup Language (XML) is a general-purpose markup language and can be used in lieu of flat files. Its primary purpose is to facilitate the sharing of structured data across different information systems, particularly via the Internet.

When submitting data via XML, the customer should refer to the AuthoriaControlData schema (XSDs) provided by an Integration Consultant. When delivering XML files, each control data type should be included in a separate AuthoriaControlData XML file. The Sender ID and Version number to be included in the file will be provided by the PeopleFluent Integration Consultant. The AuthoriaControlData file should also indicate what type of data is contained in the file by populating the appropriate value in the TransactionType attribute.

Attachments

Pictures can be used in conjunction with an Employee or EmployeeEmploymentHistory integration to display employee pictures on the Talent Profile and Organization Chart.

Resumes, Cover Letters, and other documents can be loaded for both Employees and Recruiting Contacts.

EmployeePerformanceRatingHistory attachments, such as past performance reviews, can be loaded for use with the Performance module.

Common Features

All attachments are able to be sent to PeopleFluent Talent Management in a secured manner.

Filename Convention

Unless the customer is using XML to load the attachments as vfiles, attachments must use the following naming convention. See the individual sections for Pictures, Resumes, and Other Attachments for more specific examples.

SenderID-Category-AttachmentSourceSysRefKey.FileType.txt

- *SenderID*: The client-specific ID that PeopleFluent Talent Management assigns to the client. It is also the value that appears in all of the other data feeds the client sends.
- *Category*: The Category value for the attachment indicating the type of attachment, for example Employee Picture or Resume. Category values can be found under the **Setup Menu > Site Administration > File Upload > File Category**.
- *Attachment/Picture SourceSysRefKey*: Typically the employee's ID. This unique value should also correspond to the unique ID for an employee that is passed in the other data feeds (Persons file, etc).
- *FileTypes*: The file extension or type of the original file being delivered, for example .jpg or .doc.

An example of a filename might appear as follows, where the client's unique SenderID is 850000000, the document being delivered is an Employee Picture (Category 1053) in the .jpg format, and the employee's ID is 1234:

850000000-1053-1234.jpg.txt

Note: The above naming convention requires the '-' character to be present to distinguish between the values for SenderID, Category, and AttachmentSourceSysRefKey. Please do not use any additional '-' characters in the Attachment name.

File Sizes

There is a 9MB limit for all file attachments.

Encoding Pictures/Resumes

Base64 encoding must be used for all pictures, resumes, and other attachments delivered to PeopleFluent Talent Management.

Base64 encoding is used to encode data before it's transferred across certain (typically legacy) email systems that only support 7-bit ASCII. There are tools available for free on-line to accomplish this if needed.

Base64 encoded files look something like the image below, meaning everything is a readable ASCII character.

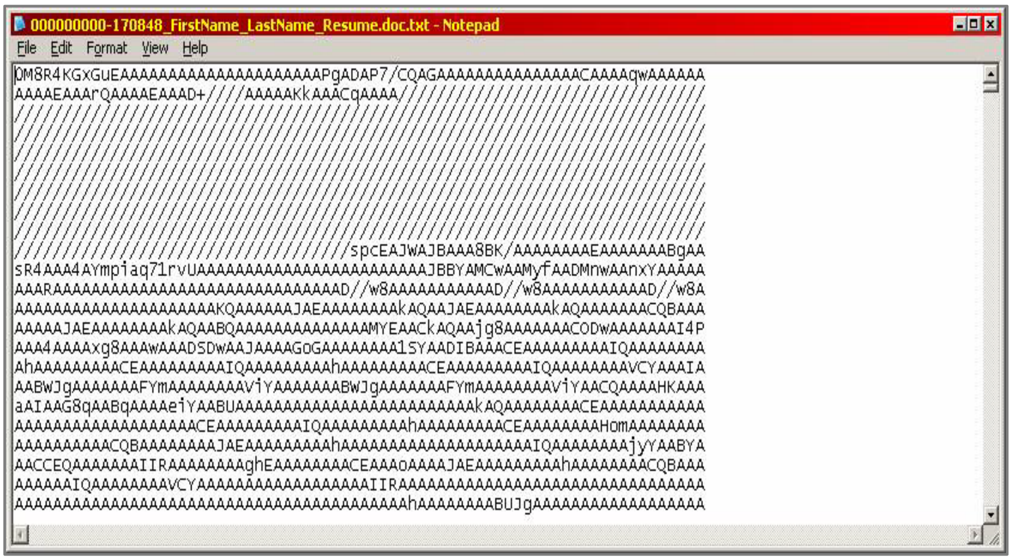

Figure 1: Base64 Encoded File

Unable to provide Base 64 encoded attachments?

PeopleFluent integrations can configure the integration tools to Base64 encode your attachments. Please work with support or services to submit a case to have this feature configured.

File naming as suggested in Filename Convention should be followed with the exception that the txt extension needs to be skipped. For example, 850000000-1053-1234.jpg instead of 850000000-1053-1234.jpg.txt

Should you not be able to follow this naming convention you'll need to provide PeopleFluent with a stable immutable filename pattern. In any case the filename pattern does need to contain the key for the record in question.

Pictures

Instructions for loading Picture Attachments

To load picture attachments

1. Determine which Category value to use. This example uses '1053' for 'Employee Picture'.
2. Use the filename convention above to identify the picture to be uploaded, e.g., 850000000-1053-1234.jpg.
3. Base-64 encode the picture either programmatically or using a website which provides the functionality online.
4. Copy the contents of the base-64 encoding to a .txt file, e.g., 850000000-1053-1234.jpg.txt.
5. Load either the Employee or EmployeeEmploymentHistory feed to the standard directory using a combination of the *Category-AttachmentSourceSysRefKey* for the value in the Picture SourceSysRefKey column, e.g., 1053-1234.

Resumes and Other Attachments

Instructions for loading Resumes and Other Attachments

To load resumes and other attachments

1. Determine which Category value to use. This example uses Category values of '1001' for 'Resume' and '1050' for 'Performance Review'. (If the desired Category value is not present it can be added under **Site Administration > File Management > File Category**.)
2. Use the filename convention above to identify the attachment to be uploaded, e.g., 850000000-1001-1234.doc.
3. Base-64 encode the attachment either programmatically or using a website which provides the functionality online.
4. Copy the contents of the base-64 encoding to a .txt file, e.g., 850000000-1001-1234.doc.txt.
5. Using the standard sFTP directory, load the file where the attachment will be associated.

For a resume, load the Candidates feed with one of the Attachment SourceSysRefKey columns populated with a combination of the *Category-Attachment SourceSysRefKey*, e.g., 1001-1234.

For a performance review, load the EmployeePerformanceRatingHistory feed with the Attachment SourceSysRefKey populated with a combination of the *Category-Attachment SourceSysRefKey*, e.g., 1050-1234.

Loading Multiple Candidate or Performance Appraisal Attachments

If clients wish to provide multiple Attachments to the Candidates or EmployeePerformanceRatingHistories feed, each attachment will need its own unique SourceSysRefKey.

For example, a client could distinguish between the multiple Attachment SourceSysRefKeys by using values such as 1234^Resume and 1234^CoverLetter in the Candidates feed. Or 1234^2009 and 1234^2010 in the EmployeePerformanceRatingHistories feed where 2009 and 2010 are plan years related to each appraisal. (Please do not use the '-' character.)

The file names for the Candidates feed would be:

850000000-1001-1234^Resume.doc.txt

850000000-1057-1234^CoverLetter.doc.txt

The file names for the EmployeePerformanceRatingHistories feed would be:

850000000-1050-1234^2009.doc.txt

850000000-1050-1234^2010.doc.txt

The values 1001-1234^Resume and 1057-1234^CoverLetter would be populated in the Attachment SourceSysRefKey fields on the Candidates feed. The values 1050-1234^2009 and 1050-1234^2010 would be populated in the Attachment SourceSysRefKey on the employeePerformanceRatingHistories feed.

Integrations Deltas and Full Files

For those customers who have opted for a Control Data Integration, there are several topics worth covering. This section covers both the common features between flat-file and XML customers, starting with the common features.

Common Features

Each of the following sections will discuss topics for consideration and present the PeopleFluent identified best practices and industry standards.

For each of the following sections, please read the overview as well as the considerations.

Control Data Content

Full Files and Delta Files

All Data is treated as change data by the PeopleFluent Talent Management System, regardless of the data format or load mechanism, including the control data spreadsheets for non-integration customers. PeopleFluent will only ever touch records that customers explicitly give permission to touch. PeopleFluent will not inactivate records by directly manipulating the file.

PeopleFluent does not delete all the existing data for a particular set of data and re-load it from scratch on an ongoing basis. In other words, an overarching kill and fill approach to loading full data sets cannot be supported.

During the initial phase of an implementation, only a subset of data should be provided to allow for validation of file format and validating referential integrity examples.

Some feeds are kill and fill, so each time client sends data, they must send a full record set.

Deltas

PeopleFluent's preference is to only receive records which have changed since the last set of Control Data Files was delivered. These changes can include record adds and updates (including inactivating a record). PeopleFluent never physically removes records from the database via the feeds.

Receiving only deltas prevents the system from having to process large volumes of data that likely has not changed since the last set of files was delivered. It also shortens the processing window, which decreases the likelihood of errors and limits the window time during which performance on the customer site could be affected.

Full Feeds

PeopleFluent's policy is to not accept full feeds on a periodic basis. It is important to understand that even if full feeds are provided (in the course of testing), PeopleFluent will still only process those records included in the feed. In other words, there is no automatic inactivation of records. Processing of Control Data at the top level is not kill and fill.

PeopleFluent Data Hub

In cases where ongoing data integration is required but the ability to generate delta files may be limited or not feasible, PeopleFluent's Data Hub technology may be used to analyze incoming customer data files in order to determine the "delta" in data sent between consecutive feeds. For information about the Data Hub solution, consult your Account Manager or Project Manager.

Custom Date Formatting

Should you have any issues with generating our required date format of yyyy-MM-dd for the flat files we can configure date conversions. There are two requirements for this to work

- All dates need to follow the same format. Mixing different formats is not supported.
- Custom fields that are defined as dates are not supported.

Data Trimming

PeopleFluent can configure the system to trim out extra leading and ending spaces from the flat file data. We only need to know the list of fields that need to be trimmed.

Integrations Transferring Files

The transfer method is the method by which a client will send files to PeopleFluent for movement into the PeopleFluent Talent Management environment. There are several different transmission options available when submitting flat-files to PeopleFluent.

Note: PeopleFluent does not currently retrieve files from a customer site; the files must be delivered to PeopleFluent.

Common Features

Files can be transferred via sFTP or HTTPS based on client preferences and the file format determined by the client.

Transfer Methods

sFTP

The customer has the option of delivering files via sFTP.

Test and Production

For sFTP both Test and Production files will be delivered to the following server:

Table 9: sFTP Site URLs

Data Center Location	URL
Atlanta	sftp-us.ltghosting.io
London	sftp-eu.ltghosting.io

Files should be placed in the below directories regardless of the type of field delimiter and regardless of the file extension.

For sFTP, files are routed based on their extension type or filename. Files will be sent to a gateway for encrypted files based on extensions .pgp, .gpg, and .zip. Files beginning with the customer DUNS number are considered attachments and will be sent to the attachments gateway. All other file extensions and filenames are sent to a gateway for unencrypted files.

Table 10: sFTP Folders at a Glance

Environment	Folder
Test	/incoming/test
Production	/incoming/prod

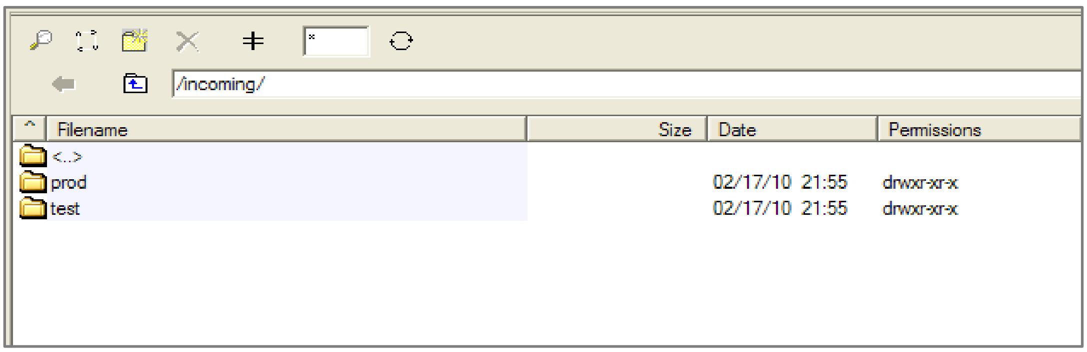

Figure 3: Example of Folders in an sFTP Site

File Ordering

PeopleFluent now offers four different types of flat file integrations at this time via the sFTP file delivery mechanism. Since the ordering of the data files are relevant because of existing dependencies we offer.

Standard Flat Files

1) Files are imported in "last modified on" order. This is the default and how most integrations are working. For zip files the files need to be named alphanumerically in import order.

2) Files are imported in random order and a trigger file is delivered to signal that all files have been transmitted. The system will automatically order the files for you. The trigger file can be named any name but will need the ".trg" extension. These can also be encrypted.

Please note that the "last modified on" and "trigger file" integrations cannot be mixed. You will need to select one.

Custom flat Files

PeopleFluent will do the data mapping to our flat file requirements for you. Please work with your account manager and PeopleFluent Services for additional details.

HTTPS

This is not a recommended method to submit flat files. File order is not guaranteed using this method.

PeopleFluent does accept delivery of Control Data flat files via HTTPs (post).

All unencrypted flat-files delivered via HTTPs should be delivered to the following URL:

https://<hostname>/invoke/BC_R_BCFlatFile.GateWay:inboundUnEncryptedFF

Note: All unencrypted flat-files delivered HTTPs should be delivered to this URL.

One example might be:

http://tmintegration-u1.peoplefluent.com/invoke/BC_R_BCFlatFile.GateWay:inboundUnEncryptedFF

PeopleFluent supports the transfer of Control Data files via https (post). Username and Password authentication is used to insure the user performing the post matches the data delivered. The data can either be delivered in a post variable or by setting the content type appropriately. Full details are provided in the XML and flat-file sections below. When transferring flat-files via http or https, the customer must deliver flat-files in an http post variable called $ffdata. If this is not possible, the customer must explicitly set the content-type of the http request to application/x–wmflatfile.

Files should be delivered to PeopleFluent in the appropriate order. The files will be processed in the order in which they are delivered. The order of the control data is listed in the Introduction to Control Data section.

XML

There are several different transmission options available when submitting XML files to PeopleFluent.

Note: PeopleFluent does not currently retrieve files from a customer site; the files must be delivered to PeopleFluent.

HTTPS

PeopleFluent supports the transfer of Control Data files via https with XML. When transferring XML via https, the customer must deliver the XML in an http post variable called $xmldata. If this is not possible, the customer must explicitly set the content-type of the http request to **text/xml**.

All unencrypted XML files delivered via HTTPs should be delivered to the following URL:

https://<hostname>/invoke/wm.tn/receive

One example might be:

http://tmintegration-u1.peoplefluent.com/invoke/wm.tn/receive

Control Data Acknowledgements

Email or sFTP acknowledgements are produced when data is loaded into the PeopleFluent Talent Management System.

The acknowledgements contain details around the number of records processed, the number of successes and failures, as well as detailed transaction information. These acknowledgements are intended to be used for auditing purposes and should be delivered to the customer team.

By default you will receive a single audit report attachment via email for each flat file.

The following are exceptions:

- You have selected an option to retrieve the audit reports from your sFTP site.
- The size of the final audit report exceeds 10Mb. In this case you will need to login to your sFTP site and retrieve the report manually.

You can also opt to only receive emails if there were errors only.

Firewall and Domain Whitelisting

PeopleFluent sends emails for both data loading results and workflow notifications for actual application activities (recruiting, compensation, performance, etc.). These emails may be prevented from being received due to the client's own firewalls.

If the client uses domain whitelisting, the client should add all of the following to their whitelist ruleset of domain names based on the data center location where their instance of PeopleFluent Talent Management is deployed:

Table 11: Domains for Whitelisting

Atlanta	London	Toronto
• *.peopleclick.com • *.peoplefluent.com • *.linkedin.com • *.google.com	• *.peopleclick.eu.com • *.peoplefluent.eu.com • *.linkedin.com • *.google.com	• *.peoplefluent-ca.com • *.linkedin.com • *.google.com

Notes:

- The LinkedIn domain name is only required if the clients are using LinkedIn integration features.
- The Google domain name is only required if the clients are using Google Analytics.

The required domain names provided in this document are subject to change based on your organization's implementation. Contact your PeopleFluent representative for more information.

PeopleFluent highly recommends that the customer does NOT block ICMP traffic to their mail servers as this can cause problems with mail delivery. As a test, someone outside of the customer's network should ping the customer's mail server from the Internet to determine whether the customer is blocking ICMP traffic.

Frequency

If the client places a file on sFTP, it will be moved into Talent Management immediately without exception. A Functional Consultant will work with the customer as to the optimal schedule against which the files should be sent to PeopleFluent.

The frequency in which files are delivered to PeopleFluent is largely determined by the customer, the criticality of the data point remaining current, and the approach in delivering the data (Full Feeds or Deltas). Another factor which can come into play relates to the amount of data being sent.

For files that are deltas, PeopleFluent can support any frequency the customer wishes up to and including real-time delivery.

A key factor in determining frequency is the criticality of having a particular type of data updated. For instance, the Person, User, and Employee data files contain key information that likely needs to stay current at all times. As an example, this is particularly true where a new recruiter is hired into the organization and needs to access PeopleFluent Talent Management System immediately. In this situation, PeopleFluent would recommend that persons, users, and employees be updated nightly with the delta file.

Conversely, it may be less important that the Organizations file feed be updated daily, but it might be something that is updated weekly. Since files are processed immediately when they are delivered to PeopleFluent, each feed can be delivered on an independent customer-defined timeline.

These are just some of the factors which must be considered by the customer and PeopleFluent when determining the frequency at which Control Data feeds will be delivered to PeopleFluent. It is important that the customer work with the integration consultant to come up with the best schedule for Control Data.

Appendix A: Retired Feeds

Retired Feeds or APIs

The following feeds have been retired either with this release or in an earlier version. Please refer to documentation prior to 1.21.1110100 for information specific to these feeds. An integrations consultant can assist in finding the correct document version for you:

- PositionHistory (CPD)
- StatusHistory (CPD)
- Template Definitions
- SalaryGradesSuite (CPD)
- BonusHistory (CPD)
- SalaryHistory (CPD)
- StockHistory (CPD)
- TalentAssessments: feed has been rolled into TalentProfileAssessments
- Candidates: feed has been moved to CandidateProfile
- Languages: feed has been moved to CandidateProfileLanguages
- ExternalWorkHistory: feed has been moved to CandidateProfileWorkHistory
- ExternalEducationHistory: feed has been moved to CandidateProfileEducation
- References: feed has been moved to CandidateProfileReferences
- EmployeeOrgChart
- TargetHistory (CPD)
- BonusPlanCodeHistory (CPD)
- CurrencyHistory (CPD)
- EmployeeCurrency (CPD)
- IssueHistory (CPD)
- FTE (CPD)
- OrganizationsSuite (CPD)
- OrgHistory (IndOrgUnit) (CPD)
- JobHistory (CPD)
- WorksheetCustomFields (CPD)
- EvaluationHistory (CPD)

Legal Notices

Website: www.peoplefluent.com