Exchanging Employee Attributes

Whitepaper

Alphabet Carbon Tracker

FYNCH
EVERY TRIP COUNTS

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This document explains how to share employee attributes with the Fynch Platform to ensure employees are assigned to the correct mobility group. Fynch offers several methods to exchange these attributes, including direct integrations with popular HR software and secure file transfers.

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1 Introduction

To accurately calculate travel expenses, Fynch needs to know which mobility policy to apply to each employee. This is achieved by synchronizing employee attributes, which can also be used in custom reports.

Fynch provides two secure methods to exchange employee attributes:

1. Direct connection to HR software (e.g., AFAS Online)
2. Periodic data file exchange (via cloud storage or SFTP)

2 Integrating with HR software

Currently, Fynch supports direct integration with AFAS. For other HR systems, please contact Customer Success.

2.1 Synchronising with AFAS

Upload the Fynch GetConnectors to AFAS and provide Fynch with your AFAS URL and token. The standard GetConnector retrieves:

- Employee identifier
- Employee email address
- Collective Labour Agreement (CLA or CAO)
- Employment end date

The Vehicles GetConnector retrieves:

- Registered vehicle for the employee
- Vehicle's end date

The Wage Components GetConnector retrieves (a subset of) wage components.

It is possible to customize the standard GetConnectors if further information needs to be exchanged. Please get in touch with our Customer Success team if you suspect this might be the case.

2.1.1 Configuring the integration

2.1.1.1 Obtaining the Fynch GetConnectors   Contact our Customer Success team to obtain a copy of the Fynch GetConnectors for AFAS; save the `.gcn` files locally.

Sign in to your AFAS Profit environment and if needed upload the above files into the Profit environment by using the upload button.
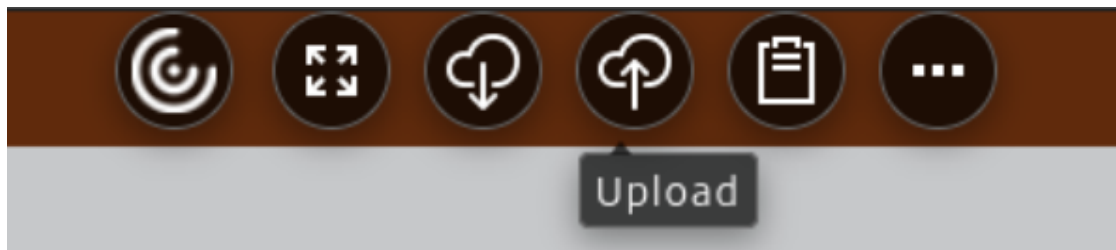
2.1.1.2 Configuring an App Connector In Profit, navigate to **General » Management » App Connector** and add an App Connector with:

- Name: `Fynch Mobility`
- Enable **Generate a token automatically**
- Select **Create a new user group based on the App connector name**
- Select **Create a new user based on the App connector name**

Click **Next** and then select **Actions » Import** to import the Fynch GetConnectors you received and uploaded above.

Click **Next** again, leave Update Connectors blank and then click **Finish**.

More information is available from the AFAS website (NL).

2.1.1.3 Testing the GetConnector Test the connector on the AFAS Connect website with your AFAS membership number and the token that was generated for the App Connector above.

Once this works correctly please provide Fynch with the AFAS Online membership number or AFAS base URL, whether this is a Production, Accept or Test environment, and the token created for the App Connector. The token must be sent over a secure channel to the Fynch Support team; we recommend using Oxilion OTS for this.

3 Exchanging a data file

If your organisation is using a different HR software solution, then it is possible to exchange employee attributes via a data file. The format of such a file should be either JSON Lines or CSV. Fynch supports transferring the file to a cloud storage bucket, or fetching it from a local SFTP server.

3.1 Required attributes

Whether using CSV or JSON Lines, data files exchanged with Fynch should include the following items, plus any attributes that are required to determine the mobility policy of each employee.

`email` : This field is used to link each employee to their Fynch account.

`employee_id` : This field is optional, but can be used to assign a unique employee identifier to the user. If omitted, then the user's email is used as their primary identifier.

`expires_on` : This field is optional, but can be used to off-board users from the Fynch Platform. When using this field, the data file should include employee who have recently expired next to active users.

Remaining attributes or columns in the data files will be stored with the user and are used to assign them to the correct mobility group and to create expenses. Please discuss with your customer success manager which additional attributes might be required to map your employees onto your mobility policy.

3.2 Supported file formats

Fynch support the following data formats when exchanging employee attributes.

3.2.1 JSON Lines

The recommended format to exchange attributes is using JSON Lines. Unlike CSV, this file format avoids ambiguity in character encoding, boolean and null or missing values.

```
{"employee_id":"123456", "email":"jane@company.example",
↪  "expires_on":null, "wfh":false, "lease_car":true}
{"employee_id":"123457", "email":"john@company.example",
↪  "expires_on":"2024-01-01", "wfh":false, "lease_car":true}
```

When writing JSON Lines documents please use ISO 8601 formatted dates, such as 2024-11-01.

3.2.2 CSV

If using JSON Lines is not an option, then it is possible to use CSV instead. The comparable CSV-formatted example would look like:

```
employee_id,email,expires_on,wfh,lease_car
123456,jane@company.example,,0,1
123457,john@company.example,2024-01-01,0,1
```

When creating CSV documents, please use:

- UTF-8 as the file encoding
- column labels on the first row
- UNIX-style line separators
- no quotes around values
- a comma (,) as the field separator
- a decimal point (.) as the decimal separator
- no numeric thousands separator
- ISO 8601 formatted dates, such as 2024-11-01

3.3 Uploading to Fynch

Once you have the data file itself, the Fynch platform supports several mechanisms to transfer employee attribute files. You can use the Google Cloud Console to directly upload a data file manually, which could be a good option for infrequent or non-automated uploads. Alternatively it is possible to automate the upload by using Google's command line tools. Finally, the Fynch Platform can be configured to connect to a remote SFTP server to receive the data file periodically.

The three different options are described in the following subsections.

3.3.1 Upload using the Google Cloud Console

A requirement for this method is that you have access to an appropriate Google account for the upload; if needed creating a new account. Please share the Google account email address with your Fynch account manager or the Fynch support team, mentioning that you would like to use this Google account to upload employee attributes to the Fynch Platform.

The Fynch support team will then set up the correct access controls and provide you with a dedicated URL to the Google Cloud Console where you will be able to upload the data file.

3.3.1.1 Uploading a new data file   Please ensure your local attributes file is in the agreed format, and is named `attributes.csv` or `attributes.jsonl`.

Then open the URL provided to you by Fynch and then click on the **UPLOAD FILES** button.
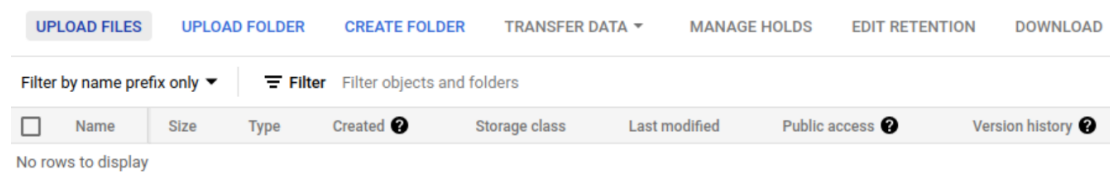
Then select the above file to upload it to Fynch.

3.3.2 Upload using the Google Cloud CLI tools

This method allows a customer to send employee attributes data files directly to the Fynch Platform in an automated fashion and without the need for a local (SFTP) server. It uses Google's standard cloud CLI tools and can be used both with and without a Google account.

3.3.2.1 Installation   Follow Google's instructions to install the Google Cloud CLI on your platform. During the installation you you can either authenticate yourself via your Google account, or using a service account key file provided by Fynch.

3.3.2.1.1 Using a Google account   If you have an existing Google account that you would like to use to upload the file, then simply sign in using that account.

```
gcloud auth login
```

Once this succeeds, please send your Google account's email address to the Fynch Support team, mentioning that you would like to use this account to upload employee attributes.

This is the preferred method, since it works without sharing a credentials file for the service account.

3.3.2.1.2 Without a Google account   In case you don't have an appropriate Google account to use, then it is possible to authenticate using a credentials file provided by Fynch. If you would like to use this method, then please request a service account key file from the Fynch Support team and then run the following command to activate the service account:

```
gcloud auth activate-service-account
↪   --key-file=/path/to/your/fynch-keyfile.json
```

You will then execute all further commands as the service account, without needing a Google account.

3.3.2.2 Transferring the employee attributes data file   Use the following command to upload the employee attributes file to the Fynch platform. Note that it is important that the destination filename is always the same: `attributes.jsonl` or `attributes.csv` depending on the file format.

Replace `<fynch-storage-bucket>` with the storage location provided to you by Fynch.

```
gcloud storage cp attributes.csv
↪   gs://<fynch-storage-bucket>/attributes.csv
```

3.3.3 Downloading from a local SFTP server

This method allows a customer to make the employee attributes data file available on an SFTP server under their own control and provide Fynch with the appropriate access credentials to fetch the data.

Please get in touch with the Fynch Customer Success team if you'd like to explore this option further.