

User Integration (OSHA Compliance)

Version 1.0

Last Modified: May 24, 2018

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Overview

VelocityEHS provides data integrations to meet historical recordkeeping needs, limit front end administration, and keep employee information up to date. This document outlines VelocityEHS' user integration, its purpose, technical specifications and requirements.

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Revision History:

Date	Version	Description	Created by (Initials)	Reviewed by
May 24, 2017	1.0	User Integration – OSHA Compliance	M.B.	

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1. User Integration (OSHA Compliance)

Overview

The user integration is an automated way of adding end users to the VelocityEHS application. During new implementations, it is used to quickly establish an initial user base instead of administratively creating user accounts through the front end of the application.

Afterward, it may be used as an automated service that runs on a schedule, keeping employee information up-to-date. This automation is highly recommended, but also a mandatory requirement if Single Sign On (SSO) is going to be used.

Purpose

Depending on the overall number of employees, the number of intended “end users” of the application, and/or the availability of an IT professional, the User Integration service may achieve the following:

Initial User Base

In order to access the VelocityEHS application, an end user must have an existing user account. To quickly give employees access to the application and lessen the administrative burden of manually creating their user accounts, the user integration may be used to add the accounts in bulk. Once this initial user base is established, their profile information may be maintained administratively moving forward.

Optional one-time import.

Up-To-Date Employee Information

Employee information is used in some areas of the VelocityEHS application and can be automatically populated if that information exists in an end user’s profile. Implementing the User Integration service that runs on a schedule, the automation may control: The addition of user accounts for new hires; The deactivation of accounts for terminations; Up-to-date profile information, such as job titles, position start dates, or years in service to name a few. User profiles may also be maintained administratively in concurrence.

Recommended recurring import.

Single Sign On

Implementing Single Sign On (SSO) – which in a nutshell means an end user may access the VelocityEHS application without having to remember a username and password, as long as they are logged into their

computer – requires an up-to-date employee base that is achieved through the User Integration service. User profiles are solely controlled via the service and cannot be maintained administratively.

Mandatory recurring import when SSO is enabled.

Process

The User Integration service detects changes to a flat file with the name “users.csv” that has been uploaded to a VelocityEHS server. Each time the file is updated, the service cycles through each row and will either add a new user account to the VelocityEHS application if no such account exists, or update an existing user account with the information provided.

User account detection occurs by comparing existing accounts with the field in the flat file designated as the globally unique identifier. Only one globally unique identifier may be set and should not be changed. The globally unique identifiers available for selection are:

- UserName
- EmployeeNumber

When the User Integration service has finished iterating through the contents of the flat file, an email is sent to designated recipients, notifying them of the outcome by including a summary of log messages.

Requirements

To ensure a successful import, the following requirements must be met:

- The employee information is provided in a Comma Separated Value (CSV) file. The file must follow standard CSV file formatting rules.
- The CSV file must be saved with UTF-8 encoding to preserve any special characters.
- The User Integration service requires that the CSV file be sent to a VelocityEHS server using the Secure File Transfer Protocol (SFTP). The credentials for accessing the server shall be provided by VelocityEHS at the time the SFTP account is created.
- The columns in the CSV file are generated in the same order each time the file is sent. Columns cannot be added or removed after the file format has been tested and approved for importing.
- If the CSV file contains a header row, it must always contain the header row each time the file is sent. The opposite is also true: If the file does not contain a header row, it should never contain one.
- The CSV file must be named **users.csv**

Technical Specifications

The required fields are as follows:

UserName

The unique user name used to login to the application. It also aids system administrators in searching for a particular user profile.

Alphanumeric, 255 characters. Example: jdoe

Available as the globally unique identifier.

DisplayName

The searchable name that will identify a user throughout the application. The most common naming convention is a first name followed by a surname (e.g., John Doe). This name will appear in agency reports, forms that automatically populate user profile information, and any fields that assign responsibility.

Alphanumeric, 255 characters. Example: John Doe

Email

The preferred email address of the user that email notifications may be sent to. This will also allow the user to be placed in roles of responsibility, carrying ownership to items they may be assigned to.

Alphanumeric, 255 characters. Example: john.doe@example.com

LocationShortCode

The short code of a location the user is situated at. The short code provides a personal dashboard unique to the user. The short code is administered in the location tree.

Alphanumeric, 50 characters. Example: ONT-OAK-PLANT1

Active

The flag that determines if a user may access the application or appear in autosuggested name fields.

Available values:

- *True*
- *False*

Example: True

Gender

The gender of the user. The gender is auto-populated in an Incident's "Personal Information" component, as well as OSHA's Form 301.

Available values:

- *Male*
- *Female*

Example: Male

BirthDate

The date of birth of the user. The date of birth is auto-populated in an Incident's "Personal Information" component, as well as OSHA's Form 301.

Date, formatted as MM/DD/YYYY. Example: 08/20/1974

HomeAddress

The street address of the user's place of residence. The home address is auto-populated in an Incident's "Personal Information" component, as well as OSHA's 301 Form.

Alphanumeric, no character limit. Example: 123 Oak Drive

EmployeeStartDate

The date that the user was hired. The employee start date is auto-populated in an Incident's "Personal Information" component, as "Hire Date", as well as OSHA's 301 Form. The employee start date is also used in calculating training tracking progression.

Date, formatted as MM/DD/YYYY. Example: 01/28/2012

Optional Fields

Further to the required fields listed above, the user integration may also support the following, optional fields:

FirstName

The common name given to the user. The first name is displayed in user profiles.

Alphanumeric, 255 characters. Example: John

LastName

The surname given to the user. The last name is displayed in user profiles.

Alphanumeric, 255 characters. Example: Doe

Supervisor

The globally unique identifier of the user's supervisor. The supervisor is displayed in user profiles and in the training profile view.

Alphanumeric, 255 characters. Must match the globally unique identifier of the import. Example: jsmith

HomePhoneNumber

The telephone number to the user's place of residence. The home phone number is auto-populated in an Incident's "Personal Information" component.

Alphanumeric, 255 characters. Example: 555-1234

HomeCity

The name of the city that the user's place of residence resides. The home city is displayed in user profiles.

Alphanumeric, 50 characters. Example: Oakville

HomeState

The name of the state or province that the user's place of residence resides. The home state is displayed in user profiles.

Alphanumeric, 50 characters. Example: Ontario

HomeCountry

The name of the country that the user's place of residence resides. The home country is displayed in user profiles.

Alphanumeric, 100 characters. Example: Canada

HomePostalCode

The zip code or postal code of the user's place of residence. The home postal code is displayed in user profiles.

Alphanumeric, 20 characters. Example: A1A 1A1

EmployeeEndDate

The date that the user was no longer employed. The employee end date is displayed in user profiles.

Date, formatted as MM/DD/YYYY. Example: 04/14/2015

EmployeeCurrentPositionStart

The date that the user began their current job position. The current position start date is used in calculating training tracking progression.

Date, formatted as MM/DD/YYYY. Example: 03/20/2016

EmployeeYearsInJob

The number of years that the user has or had been employed. The years in job is auto-populated in an Incident's "Employment Information" component.

Floating point number. Example: 1.5

EmployeeNumber

The employee identification number assigned to the user. The employee number is auto-populated in an Incident's "Employment Information" component.

Alphanumeric, 255 characters. Example: A12345

Available as the globally unique identifier.

EmployeeJobTitle

The current job title assigned to the user. The job title is auto-populated in an Incident's "Employment Information" component.

Alphanumeric, 255 characters. Example: Electrician

EmployeePhoneNumber

The business telephone number assigned to the user. The work phone number is displayed in user profiles.

Alphanumeric, 50 characters. Example: 555-1234, ext. 4

EmployeeWorkAddress

The street address of the user's place of employment. The work address is displayed in user profiles.

Alphanumeric, no character limit. Example: 123 Oak St. Unit 201

EmployeeWorkCity

The name of the city of the user's place of employment. The work city is displayed in user profiles.

Alphanumeric, 50 characters. Example: Toronto

EmployeeWorkState

The name of the state or province of the user's place of employment. The work state is displayed in user profiles.

Alphanumeric, 50 characters. Example: Ontario

EmployeeWorkCountry

The name of the country of the user's place of employment. The work country is displayed in user profiles.

Alphanumeric, 100 characters. Example: Canada

EmployeeWorkPostalCode

The zip code or postal code of the user's place of employment. The work zip or postal code is displayed in user profiles.

Alphanumeric, 20 characters. Example: 90541