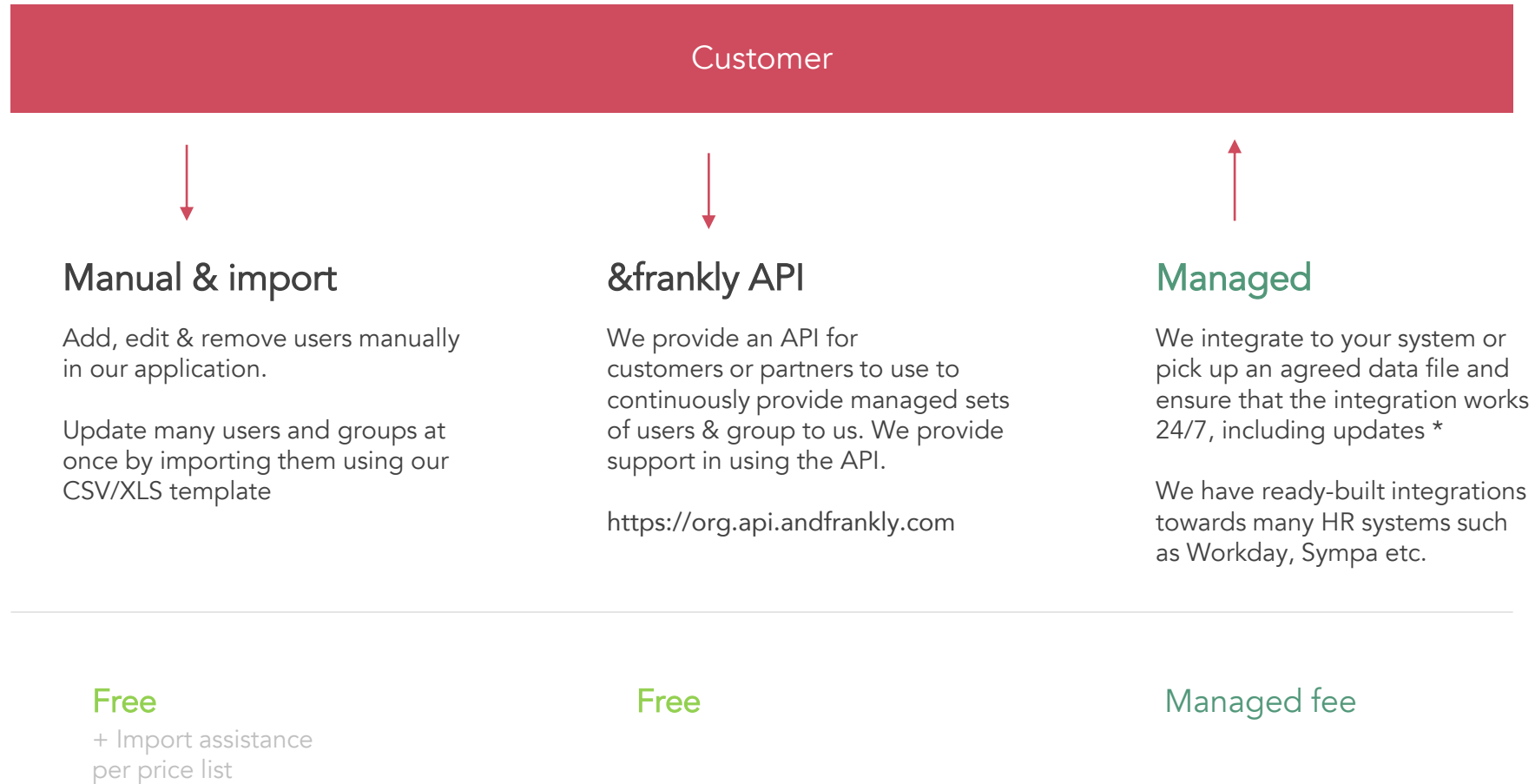


A young woman with long, dark, wavy hair and round glasses is smiling broadly. She is wearing a bright yellow button-down shirt over a light blue top. She is holding a brown paper coffee cup with a black lid in her right hand. The background is a blurred indoor setting with warm, reddish-orange tones.

# &frankly

Integrations for users & organization

# How to keep users & organization up to date



# Why keep users & organization up to date through an integration?

- GDPR compliance – personal data is removed immediately
- Reduce manual effort to maintain users & groups up to date
- Keeping organizational structure up to date typically means increased use of the tool
- More reliable results due to improved data quality
- Automatically handle changes & updates to users (organizational moves, role changes etc.)
- Increased security (no manual handling of personal data)

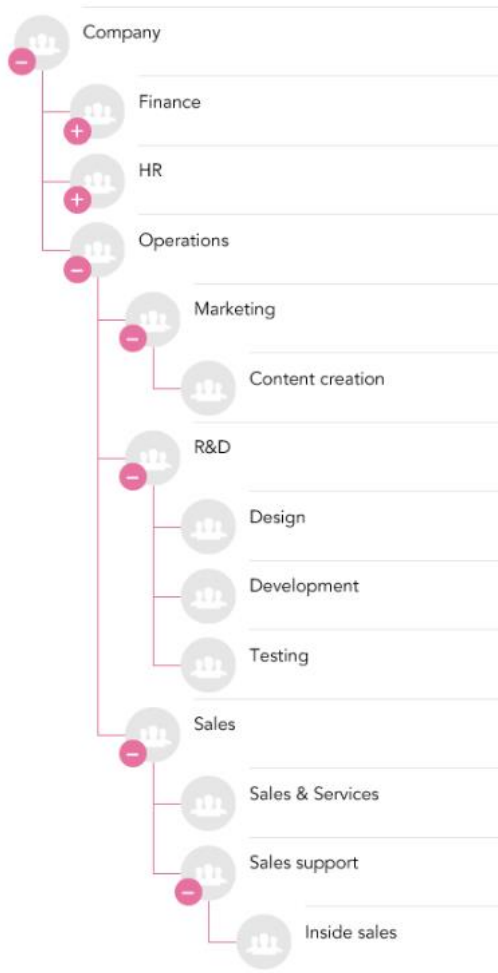
# Prerequisites for a Managed integration

- One (1) source – e.g. a transferable file or a system accessible via a documented API (see technical options)
- Allocated resources on Customer/system side from HR and IT for implementation
- Availability of necessary data re: Employees and Organizational structure (see specification)
- Specification from Customer on additional employee attributes (if desired)
- Customer point of contact for ongoing support / operations of integration

Note that custom rules and/or specific handling of e.g. poor data quality and/or rules for placing users correctly is not included in a standard integration and would have to be agreed separately.

# Example organizational structure & employee data in &frankly

## Groups



Member of  
Owner/Manager of

**Edit user**

Firstname*	<input type="text" value="James"/>	✓
Lastname*	<input type="text" value="Francis"/>	✓
Email*	<input type="text" value="demo@andfrankly.com"/>	✓
Phone*	<input type="text" value="Phone"/>	✓
Role*	<input type="text" value="Administrator"/>	✓
Career Level*	<input type="text" value="Executive"/>	✓
Gender*	<input type="text" value="Male"/>	✓
Birthdate	<input type="text" value="1981-10-27"/>	✓

# Data required for &frankly - Employees

Field	Example
Unique identifier of employee	00234567
Firstname	Peder
Lastname	Nordvaller
Email	peder@andfrankly.com
Phone (optional)*	+46739292275
IsManager (optional) **	1 (if Manager), 0 (if not Manager)
Org. unit belonging (Unique identifier org. unit)	00000014

**Selection:** All currently active employees, consultants and partners that are to be using &frankly

&frankly supports additional metadata to be provided for each employee to be used in e.g. results slicing (e.g. Gender, Birthdate/Age, Location). Such attributes can be managed under Account settings and can be provided regardless of choice of transfer solution.

\* If Phone is provided, it enables possibility to log in to &frankly using phone / confirming password via SMS

\*\* Is used to set the Manager role in &frankly

# Data required for &frankly - Organization

Field	Example
Unique identifier org. unit	00000014
Name of org unit	Product Development
Description (optional) *	Development team for digital services
Responsible manager (unique employee identifier)	00234567
Parent org. unit (Unique identifier org. unit)	00000015

**Selection:** The entire organizational structure, active org. units

&frankly can model any organizational structure, but it is highly recommended that a structure is built up using "persistent" organizational units rather than e.g. it being built on reporting managers or role structures. The reason is that &frankly provide historic tracking of data – and organizational structures based on manager names typically change very often, making it hard/impossible to track results over time across groups that are renamed / changed when managers switch places.

\* This field can also be set to some string that when searchable that simplifies finding an org. unit. E.g. a well-known short-hand code

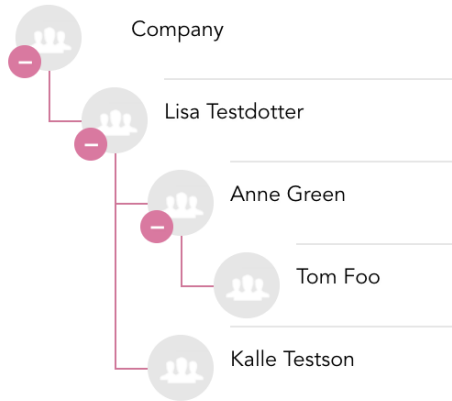
# Typical questions to consider before first meeting

- Which attributes do you want to include to segment results on? E.g. Gender, Country, Birthdate, Hire date?
- What is the best source of data on the customer side? Does it include all users (consultants? Partners?), the organizational structure and the attributes? Note: AD typically does *not* include this information.
- What is the best technical option for us as a customer to provide data to &frankly? Integrating to &frankly's API? Sending it over as a file? Asking &frankly to pick it up from customers own system? If so, HR or other?
- Which organizational structure should be used?
  - Best practice in &frankly is to use a "persistent" organizational structure where org units are structured as a tree. If this doesn't exist, a role hierarchy where reporting lines between roles/functions might work. Last and least preferred is line manage relations as they are volatile and does not preserve history well.
- How is the data quality? Does all users have email / correct organizational belonging / attributes?
  - Note: If there is too poor data quality and/or lack of data, manual handling may be required regardless of an integration.



# Different types of groups structure (pros & cons)

## Line manager structure



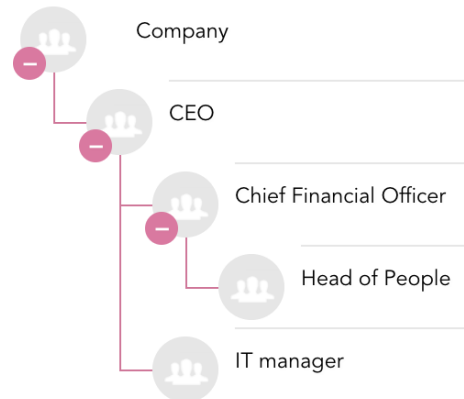
### Pros:

- Simple to set up when there is no organizational structure available / permanent IDs for roles/org units

### Con:

- Result will follow the manager:
  - If manager leaves the result will no longer be visible / accessible
  - If manager changes, results will represent “different” groups of individuals over time
- Does not always represent the “organization structure”
- Individuals without line manager (e.g. line manager is consultant, on leave) may fall outside of the structure / there may not be “one tree” depending on data quality.

## Role based structure



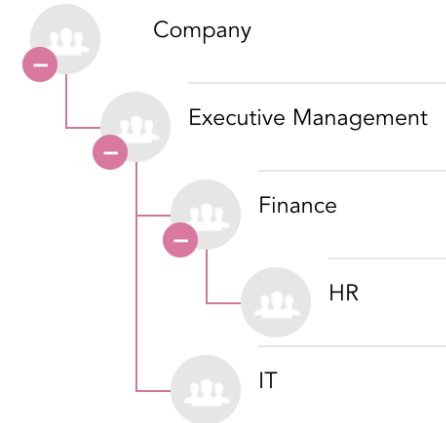
### Pros:

- Roles are typically more permanent than line managers, hence simpler to follow results over time for a given role.
- Simple to set up when there is no organizational structure available / permanent IDs for roles/org units

### Con:

- Does not always represent the “organization structure”
- Requires a role hierarchy with relations between roles that covers all employees
- Individuals who do not fill a role currently would reside outside of the tree.
- Changes in roles typically means a role is permanently archived and new one is created – meaning historic results would not be visible.

## Org unit structure (Recommended by &frankly)



### Pros:

- Follows the organizational structure if there is one.
- Easiest to track results over time as org units are “most” permanent over time – changes to org units naming & structure can be handled if the org unit ID is intact.

### Con:

- Requires a separate organizational structure provided to &frankly with unique IDs and employees & managers assigned to Org Units directly.

# &frankly APIs and Single Sign-On

## &frankly organization API (import)

This API endpoint provides means to automatically update users and groups in &frankly, and can be used to e.g. set up an automated synchronization between your HR system and &frankly.

<https://org.api.andfrankly.com/>

## &frankly upload API & service (import, alt 2)

This API endpoint and service provides customers means to upload files (CSV, XLS and XLSX) to &frankly to be used in e.g. automated processing, for example for providing user & organization data to us for import into &frankly.

<https://upload.api.andfrankly.com>

## &frankly data API (export)

This API provides access to data points such as KPIs, Response rates and Result summaries for questions asked in &frankly, as well as supporting information that may be required (such as groups that exists, when questions have been scheduled, basic question information etc).

<https://data.api.andfrankly.com/>

## Single Sign-On / SSO / SAML (login)

&frankly supports Single Sign-On where users use their enterprise username and password to log in to the service (through so called federation or via SAML).