



sFTP Implementation Guide

Overview

Recognize provides the ability to bulk update a company's user directory and account information in Recognize via the sFTP (secure File Transfer Protocol) method. Recognize hosts an sFTP server at sftp.recognizeapp.com. When a spreadsheet is uploaded, our system automatically processes the sheet to add, remove, and update users according to the data in the spreadsheet.

This system allows companies to automate their user upload and to upload at a date and time of their choosing. Further, it allows companies to collate data from several sources on their backend and submit a final sheet to Recognize to process.

Once the Recognize system processes the spreadsheet, a report will be emailed to company admins (or others as specified) with information describing if the upload was successful or if there were any errors. Errors are detailed at the row level so you can determine exactly which records failed and why.

Requirements

- Collation of data into a csv or Excel document following the Recognize import template: <https://recognizeapp.com/docs/getting-started/Sample-spreadsheet-for-import.xlsx>
- A public/private SSH key pair in OpenSSH format: <https://www.ssh.com/ssh/keygen/>
- An sFTP client that supports public/private key pair authentication
- Outbound internet connections on port 22
- Static IP address from which company will create sFTP connections

Setup

1. If you do not already have a public/private key, please generate one following these instructions: <https://www.ssh.com/ssh/keygen/>.
 - a. Read more about key pairs here: <https://help.thorntech.com/docs/sftp-gateway-classic/ssh-key-pairs/>
2. Send the following data to Recognize (support@recognizeapp.com) to create a dedicated connection:
 - a. Public key (created from step 1) - do NOT send the private key
 - b. Static IP address from which company will create sFTP connection (public IP of your server)
 - c. List of email addresses of users to notify upon completion of processing. The email addresses must be users who have accounts in your Recognize account. If you wish to manage the recipients yourself, you can create disabled user account whose email address is a distribution list.

- Recognize will create a dedicated connection and allow-list the ip-address for inbound connections within 2 business days. Once created, Recognize will send the specific connection information which will include the user name with which to connect.

Connection

- Host: sftp.recognizeapp.com
- Port: 22
- Username: provided upon connection setup
- Path: /uploads

Further step by step instructions can be found here:

<https://help.thorntech.com/docs/sftp-gateway-classic/connect-as-an-sftp-user/>

File format requirements

	A	B	C	D	E	F	G	H	
1	Employee id(optional)	Email	First name	Last name	Display name(optional)	Job title(optional)	Phone(optional)	Team(optional)	Role
2									
3									
4									
5									
6									
7									
8									
9									
10									

	J	K	L	M	N	O
1	Start date mm/dd/yyyy(optional)	Birthday mm/dd(optional)	Manager Email(optional - must be users in Recogniz	Country(optional)	Department(optio	Locale(optio
2						
3						
4						
5						
6						
7						
8						
9						
10						

The file uploaded must follow our template here:

<https://recognizeapp.com/docs/getting-started/Sample-spreadsheet-for-import.xlsx>. This file has the following requirements:

- File can be sent as csv or Excel formats. NOTE: csv files may need to have columns quoted if they include multiple values.
- The transferred sheet should include everyone who can have an active account. The system will determine which users need to be created, updated, and disabled.
- Column ordering does not matter. As such, headers must match those provided in the template with the exception that "(optional)" and format hints like "mm/dd/yyyy" can be omitted. Casing does not matter though.
- For any of the optional columns, if you do not plan to send data for them, please omit them otherwise the system will assume you want to save blank values for that column.

- The employee id column is optional but highly recommended. It is expected that the employee id is unique and persistent for the lifetime of an employee id. Including the employee id is the only way to ensure automatic updates for email changes, should they occur.
- Phone column is expected to be a mobile phone number for the purposes of SMS notifications and authentication with a phone number.
- The “Team” column is a multiple assignment column and so multiple teams can be assigned by including them as a comma-separated list. Teams will automatically be created if they have not been already. Teams will never be automatically removed though.
- The “Roles” column is also a multiple assignment via a comma-separated list.
- Start date and birthday must be a recognizable date format. We support multiple formats including standardized international formats, but custom formats must be explicitly requested. NOTE: we do not store birth year for privacy and security, if it is included, it will be stripped out.
- Manager email must be the email address of someone else in the sheet. This creates a special manager and direct reports relationship in the system that is essentially modeling your org chart and gives managers access to the Manager portal. Ordering does not matter - meaning, you can specify a manager email first and then include the manager row later in the sheet.
- Country and Department columns are singular string assignment values that are used for engagement reporting.
- Locale is for language localization in the app. The value for this column must be a specific language code. Please ask our support team for the language codes that you may need for the languages that your staff speaks. For example, english is ‘en’, spanish is ‘es’ and Simplified Chinese is ‘zh-TW’.

Getting Started & Testing

Once you are given your connection information, you will want to begin testing your file transfers. To do so, make sure the following settings are configured:

1. Ensure “Enable Sync” is turned on
2. Select “Sync provider” and make sure it is set to “sFTP Import”
3. Ensure “Dry Run” is selected when testing.

The image shows two screenshots of a user management interface. The left screenshot, titled "User management", shows the "User sync" section with the text "Pulling or pushing employee metadata to Recognize in order t". Below this, there are two toggle switches: "Enable sync" and "Sync phone number", both of which are turned "ON". A red arrow points to the "ON" button of the "Enable sync" toggle. The right screenshot shows the "Choose sync provider" dropdown menu set to "sFTP Import" and a "Dry run" toggle switch that is also turned "ON". Below the "Dry run" toggle, there is a text description: "Dry runs the data-sheet and gives a report of potential changes."

When "Dry Run" is enabled and a file is transferred, no changes will be made. Our system will detect the file transfer and analyze it for proposed changes that would happen if the file were to actually be processed. This allows you to test the sFTP connection itself as well as the file format. A report will be sent to the notification recipients configured during the set up indicating if any errors or feedback can be detected.

Please note that the "Dry Run" mode is a best effort approximation of what might occur during a real transfer. However, it cannot fully anticipate all of the changes or errors that might occur during a real transfer.

Additional Notes

1. File transfers can occur at any time of day.
2. You may send as often as is permitted by your subscription package (once per day or once per week). However, during testing, you may send as often as you wish. NOTE: do not send additional transfers until the current one has completed.
3. When a file transfer occurs, it is put into a queue and is processed on a first come, first serve basis. In most cases, the file is picked up immediately and can take up to an hour to complete depending on the number of rows.
4. You will know the file transfer has completed processing when you receive a report by email notifying the users on the notification recipient list of the results.
5. When you are ready to process the file for real, simply turn off the "Dry Run" checkbox.
6. When a file is processed and users are added, no notifications are sent out. Users are simply put into a "pending invite" state. It is up to you when you want to launch or send notifications to your users. This allows you to pre-load the users into the system and then send invitations or communications to join the program when ready to launch.