Microsoft Viva

Viva Glint: Ask the Expert series

June 25, 2024

Agenda

- Welcome & Introductions
- Data File Preparation and Troubleshooting
- Q&A

Today's hosts:

Alicia Weixelman

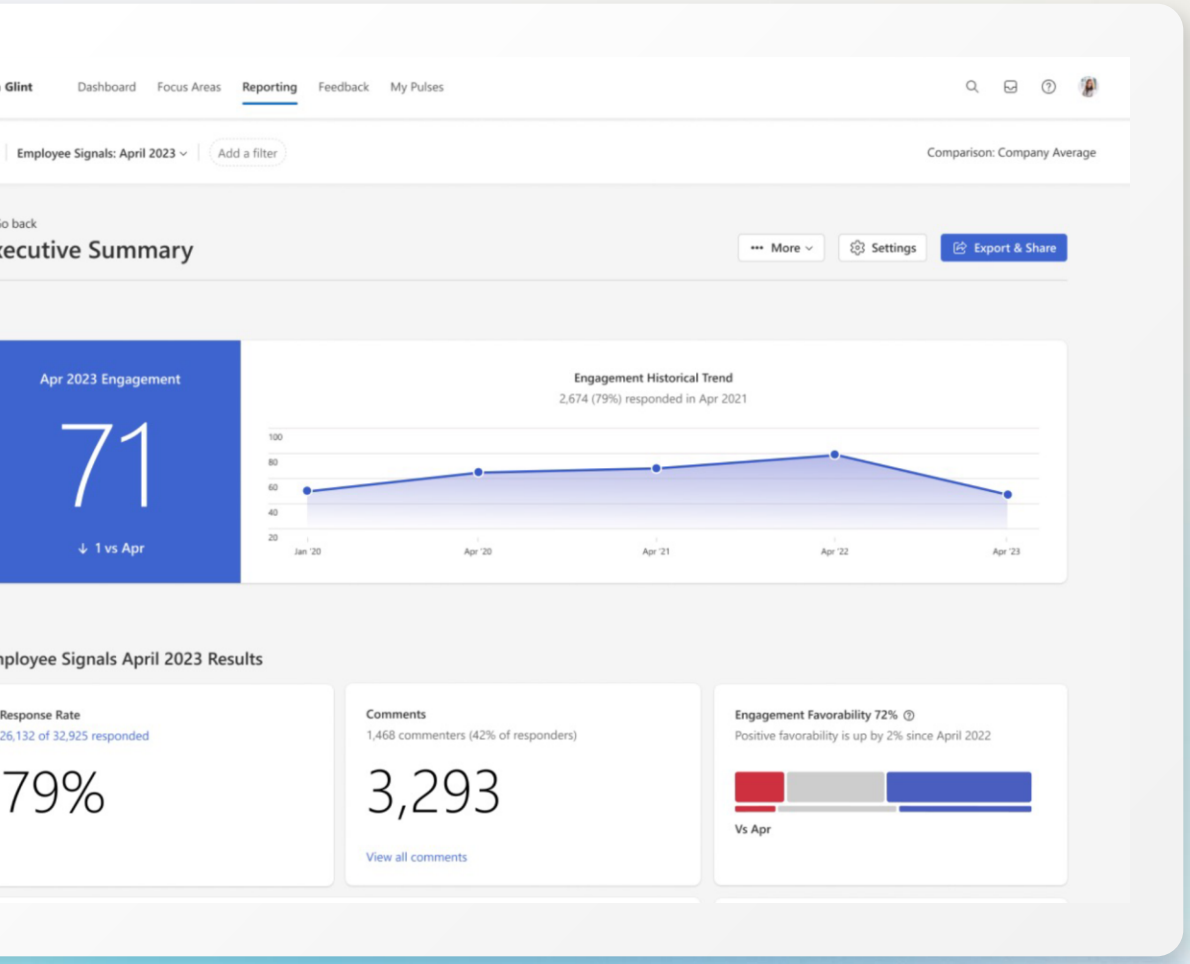
Customer Empowerment
Program Manager
Nebraska, USA

Stephanie Smith

Principal Customer Experience
Program Manager
Nebraska, USA

and meeting moderators Kathryn Bowen and Meg Roberts

Employee data in Viva Glint:



- Lay the foundation for employee sentiment insights
- Are instrumental in surveying the right employees at the right time
- Allow leaders to precisely filter data and take action

Average data preparation and upload timeline

Week 1

- Review requirements and best practices
- Set a meeting with internal stakeholders
- Contact IT for:
  - SFTP connection items
  - Allowed list updates

Week 2

- Meet with stakeholders
- Decide on final file layout and format with the Attribute Template
- Select an upload method
  - In platform
  - Secure file transfer protocol (SFTP)

Week 3

- Prepare an HRIS file
- Review data file for alignment with requirements
- Set up attributes
- Load data to Viva Glint
- Troubleshoot issues

Ongoing

- Quality checks for data accuracy/consistency
- Regular file uploads to keep employee data current
- Update attributes in Glint for new data

Potential stakeholders: HR information system vendor, IT, security, HR business analysts, employee engagement team

Attributes

Attributes are specific information you provide to Viva Glint about employees

Restrictions:

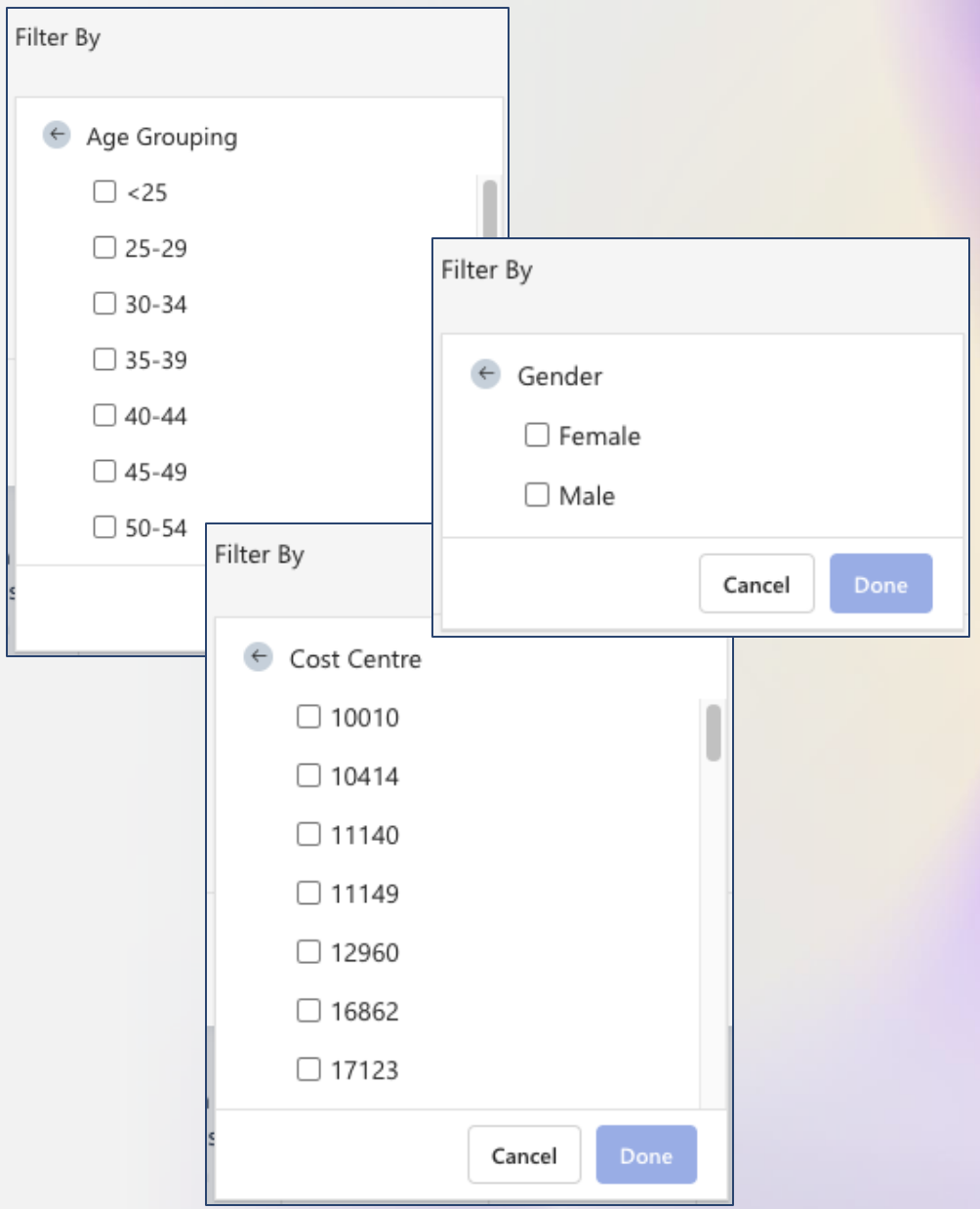
- Up to **100** Custom Attributes
- Attribute labels & values are truncated at **64 characters**

Usage:

- Some Attributes are **required** to create an employee profile
- Used for **filtering** in Reports
- Can be **constrained by Role** and **Permissions**
- Attributes can be used for **specific purposes** – Distribution Lists, Role Assignment, Time Zone, Language, Lifecycle surveying

Keep in mind:

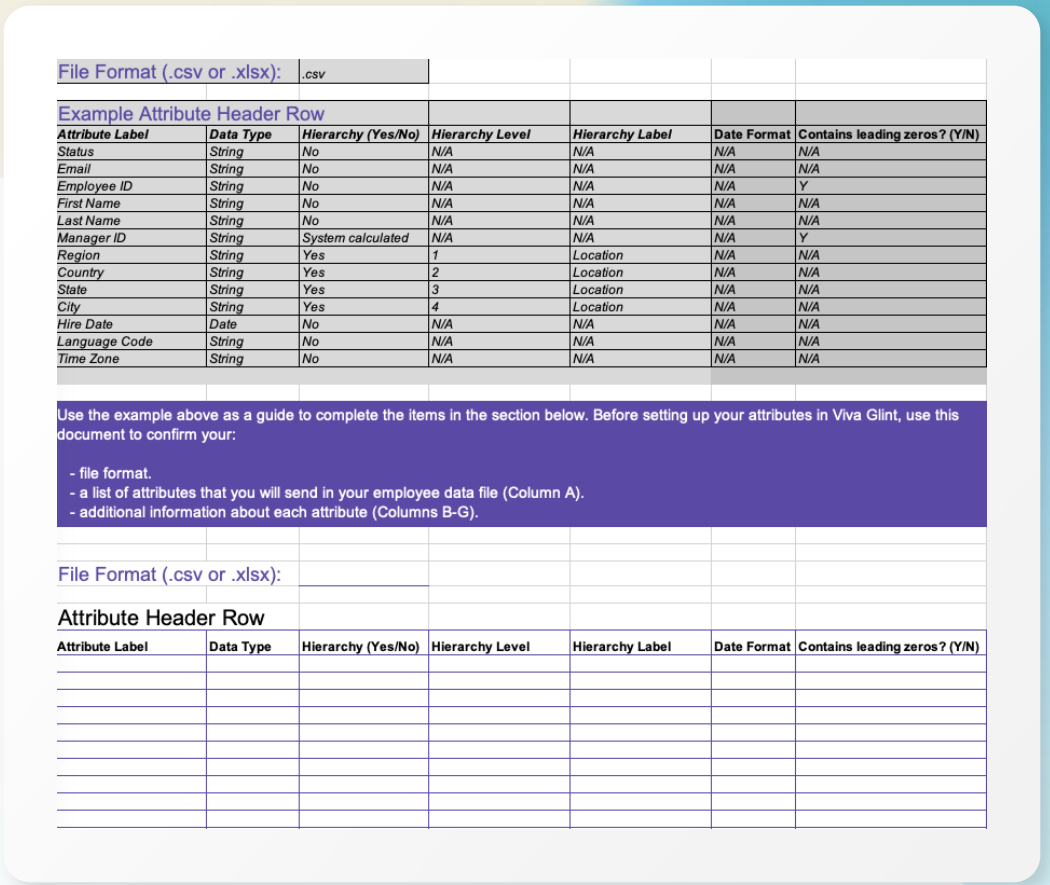
- The **confidentiality threshold** is always enforced. If it isn't met data, will not display
- Think about **consistency** as data trends over time



Data preparation & review

Build your employee data file

- Meet with **stakeholders** to decide on:
  - Required/recommended/derived attributes
  - Hierarchy attributes
  - Optional system attributes
  - Custom attributes
- Be thoughtful about **attribute values'**:
  - Consistency
  - Unique value count and confidentiality thresholds
  - Appearance in and value as report filters



File Format (.csv or .xlsx): .csv

Example Attribute Header Row

Attribute Label	Data Type	Hierarchy (Yes/No)	Hierarchy Level	Hierarchy Label	Date Format	Contains leading zeros? (Y/N)
Status	String	No	N/A	N/A	N/A	N/A
Email	String	No	N/A	N/A	N/A	N/A
Employee ID	String	No	N/A	N/A	N/A	Y
First Name	String	No	N/A	N/A	N/A	N/A
Last Name	String	No	N/A	N/A	N/A	N/A
Manager ID	String	System calculated	N/A	N/A	N/A	Y
Region	String	Yes	1	Location	N/A	N/A
Country	String	Yes	2	Location	N/A	N/A
State	String	Yes	3	Location	N/A	N/A
City	String	Yes	4	Location	N/A	N/A
Hire Date	Date	No	N/A	N/A	N/A	N/A
Language Code	String	No	N/A	N/A	N/A	N/A
Time Zone	String	No	N/A	N/A	N/A	N/A

Use the example above as a guide to complete the items in the section below. Before setting up your attributes in Viva Glint, use this document to confirm your:

- file format.
- a list of attributes that you will send in your employee data file (Column A).
- additional information about each attribute (Columns B-G).

File Format (.csv or .xlsx):

Attribute Header Row

Attribute Label	Data Type	Hierarchy (Yes/No)	Hierarchy Level	Hierarchy Label	Date Format	Contains leading zeros? (Y/N)

[Create your Viva Glint Employee Attribute Template | Microsoft Learn]

Build your employee data file: requirements and recommendations

Required | Strongly recommended | Strongly Recommended

First Name	Last Name	Employee ID	Email Address	Status	Manager ID	Hire Date	Birth Year	Term Date	Voluntary
User	One	11111	userone@contoso.com	ACTIVE		2021/03/16	1980		
User	Two	22222	usertwo@contoso.com	ACTIVE	55555	2020/02/01	1991		
User	Three	33333	userthree@contoso.com	ACTIVE	22222	2010/05/30	1975		
User	Four	44444	userfour@contoso.com	ACTIVE	22222	2015/06/01	1956		
User	Five	55555	userfive@contoso.com	ACTIVE	88888	2016/07/27	1985		

Tips

- Use the Employee Attribute Template for date format guidance in .xlsx files to avoid upload errors.
- Use Viva Glint derivations to create Manager Hierarchy (based on Employee ID + Manager ID), Tenure (based on Hire Date), and Age Group (based on Birth Year).

Build your employee data file: hierarchy attributes

Required

First Name	Last Name	Employee ID	Email Address	Status
User	One	11111	userone@contoso.com	ACTIVE
User	Two	22222	usertwo@contoso.com	ACTIVE
User	Three	33333	userthree@contoso.com	ACTIVE
User	Four	44444	userfour@contoso.com	ACTIVE
User	Five	55555	userfive@contoso.com	ACTIVE

Location hierarchy levels

Region	Country	Office
NAMER	US	Chicago
NAMER	US	New York
NAMER	Canada	Toronto
EMEA	Spain	Madrid
APAC	Japan	Tokyo

Team hierarchy levels

Division	Team
Executive	CEO
Customer Success	Customer Experience
Customer Success	Customer Experience
Customer Success	Customer Experience
Customer Success	Customer Experience

Build your employee data file: optional system attributes

Required

First Name	Last Name	Employee ID	Email Address	Status
User	One	11111	userone@contoso.com	ACTIVE
User	Two	22222	usertwo@contoso.com	ACTIVE
User	Three	33333	userthree@contoso.com	ACTIVE
User	Four	44444	userfour@contoso.com	ACTIVE
User	Five	55555	userfive@contoso.com	ACTIVE

Optional system attributes

Dashboard Language	Survey Language	Time Zone	Personal Email
en_US	en_US	America/Chicago	
en_US	en_US	America/New_York	
en_US	en_US	America/Toronto	
es_ES	es_ES	Europe/Madrid	
ja_JP	ja_JP	Asia/Tokyo	u5@gmail.com

Tip

Use Personal Email to reach out to exiting employees who may no longer have access to work email accounts.

Build your employee data file: custom attributes

Required

First Name	Last Name	Employee ID	Email Address	Status
User	One	11111	userone@contoso.com	ACTIVE
User	Two	22222	usertwo@contoso.com	ACTIVE
User	Three	33333	userthree@contoso.com	ACTIVE
User	Four	44444	userfour@contoso.com	ACTIVE
User	Five	55555	userfive@contoso.com	ACTIVE

Custom attributes

Performance Rating	Gender	Job Title
EE	F	CEO
ME	M	Mgr., Customer Success
EE	F	Customer Success Manager
EE	M	Customer Success Manager
ME	F	Dir., Customer Success

Data review

Data file

File name	No special characters (@, %, #, etc.)
File format	• .xlsx with 1 sheet, no password or formulas • .csv with a comma separator and **UTF-8 encoding**
File encryption	Included in extension (ex: filename.csv.pgp)

! Caution

Use UTF-8 encoding for .csv files, **not** UTF-8 with BOM encoding. UTF-8 with BOM encoding results in upload errors.

Attributes

Required	First, Last, ID, Email, Status
Truncation	Labels < 64 characters
Labels	No typos & user friendly
Hidden data	No hidden columns/rows
Empty cells	No empty columns/rows
Manager hierarchy	Manager ID field exists
Hierarchies	Fields for all levels
Derivations	No derived fields included
Time zone	Optional: attribute included
Languages	Optional: attribute(s) included

Attribute values

Required: First	All records populated
Required: Last	All records populated
Required: Email	Populated with unique values
Required: ID	Populated with unique values
Required: Status	Populated with ACTIVE or INACTIVE only
Truncation	Values < 64 characters
Dates	Consistent format
Inactive	Only for termed, on leave, or needed manager users
Manager ID	All populated except CEO
Manager ID	No invalid reporting loops
Time zone	Populated with valid values
Languages	Populated with valid values
Consistency	Consistent spelling/labels

[Review employee data with Viva Glint checklists | Microsoft Learn]

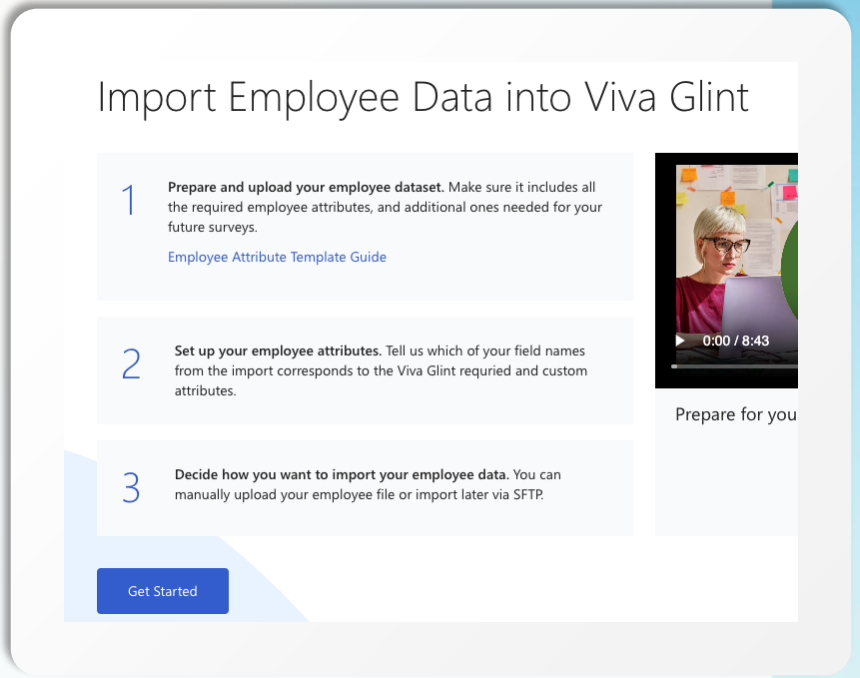
Attribute setup

Key tasks:

- Create **attribute mapping** to accept files
  - Required, derived, optional, and hierarchy attributes
- Enable **automated upload** via SFTP

Important:

- Finalize file *layout and format* **before** selecting Get Started
- Manager & other **hierarchies can't be edited** after first setup
- Note **file format and date field format**

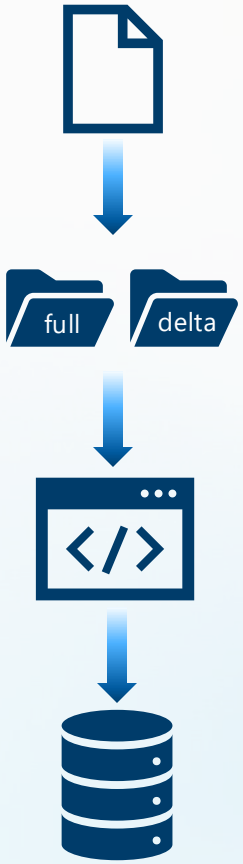


[Set up attributes in Viva Glint | Microsoft Learn]

Data upload & troubleshooting

Data file upload methods

Secure File Transfer Protocol (SFTP)



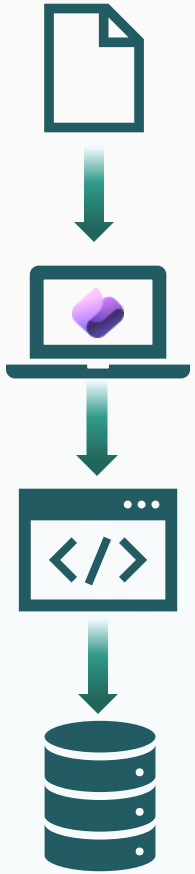
Employee data file

SFTP directories + auto import

Attribute derivation

Viva Glint database

Viva Glint People page



Employee data file

Viva Glint People page

Attribute derivation

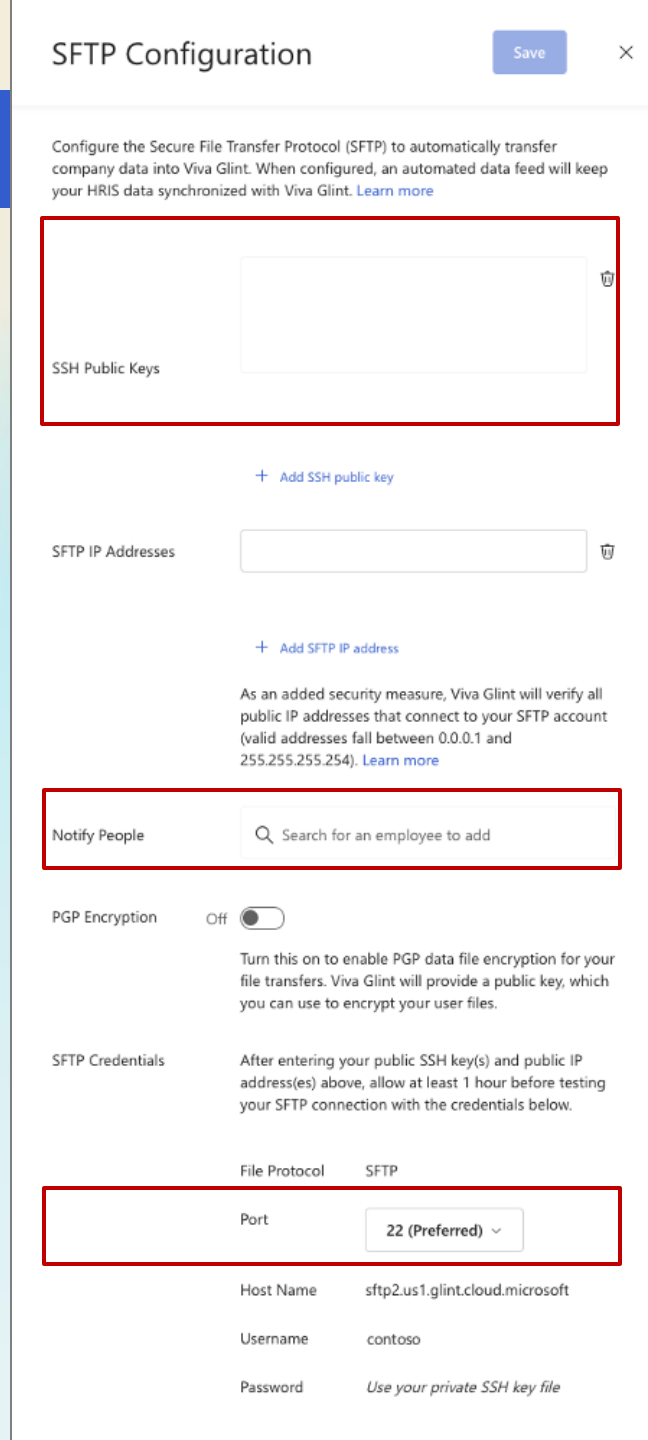
Viva Glint database

[Choose a data upload method | Microsoft Learn]

Secure File Transfer Protocol (SFTP) setup

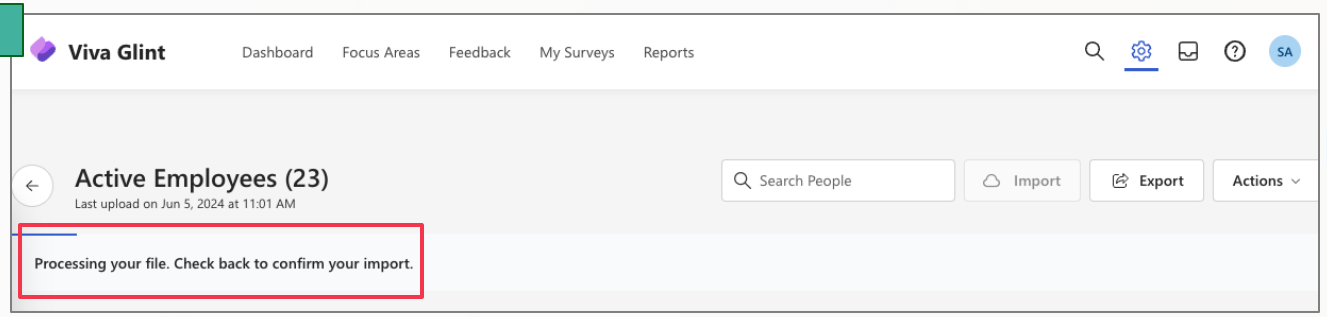
SFTP setup item:	Common pitfalls:
SSH Public keys	
Add a max of 3 keys	Attempting to add more than 3 keys
Users/HRIS vendors connect with private keys	Public key not RSA type or OpenSSH format
SFTP IP addresses *(optional)*	
Add public IP address(es) to limit accounts that can connect	Attempting to add private IP addresses
Add single IP values or ranges	
Notify people	
Select users to receive file upload emails	Attempting to add inactive/nonexistent users
PGP encryption *(optional)*	
Opt-in to file encryption with PGP public key	Encrypting with a different key or password
SFTP credentials	
Use selected port, host, and username to connect	Using incorrect host, port, username

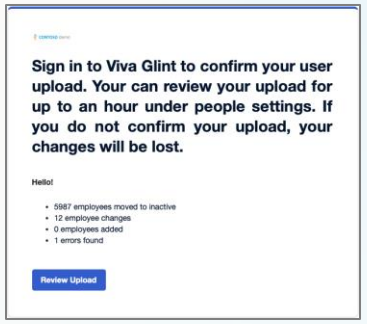
Set up SFTP in Viva Glint to import employee data | Microsoft Learn



Viva Glint People page import

1





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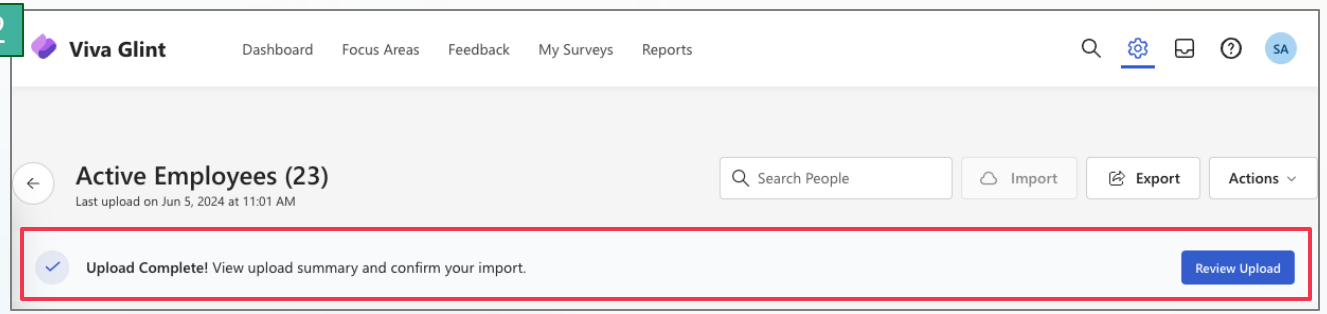
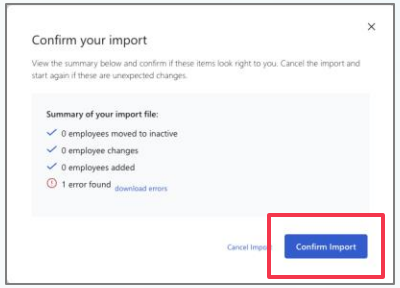


Review Upload



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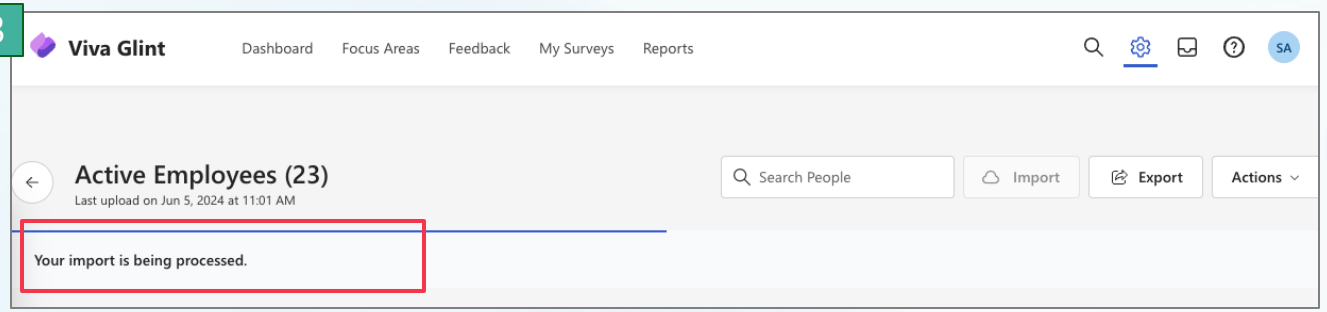
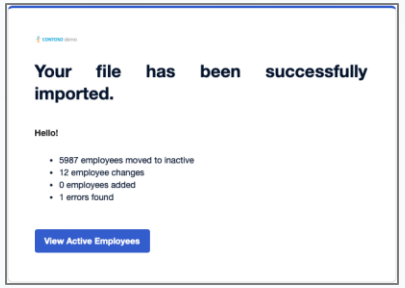




[Upload your employee attributes in Viva Glint | Microsoft Learn]

File errors versus warnings

Errors…

…completely fail a file.

- Derivation errors
  - Incorrect file encoding (UTF-8)
  - Unexpected date format
- Manager hierarchy errors
  - CEO has a manager ID
  - Managers report to themselves/each other
- Duplicated or missing columns
  - Including a Glint-derived attribute (ex: Tenure)
  - Missing required attribute (ex: Email)

Warnings…

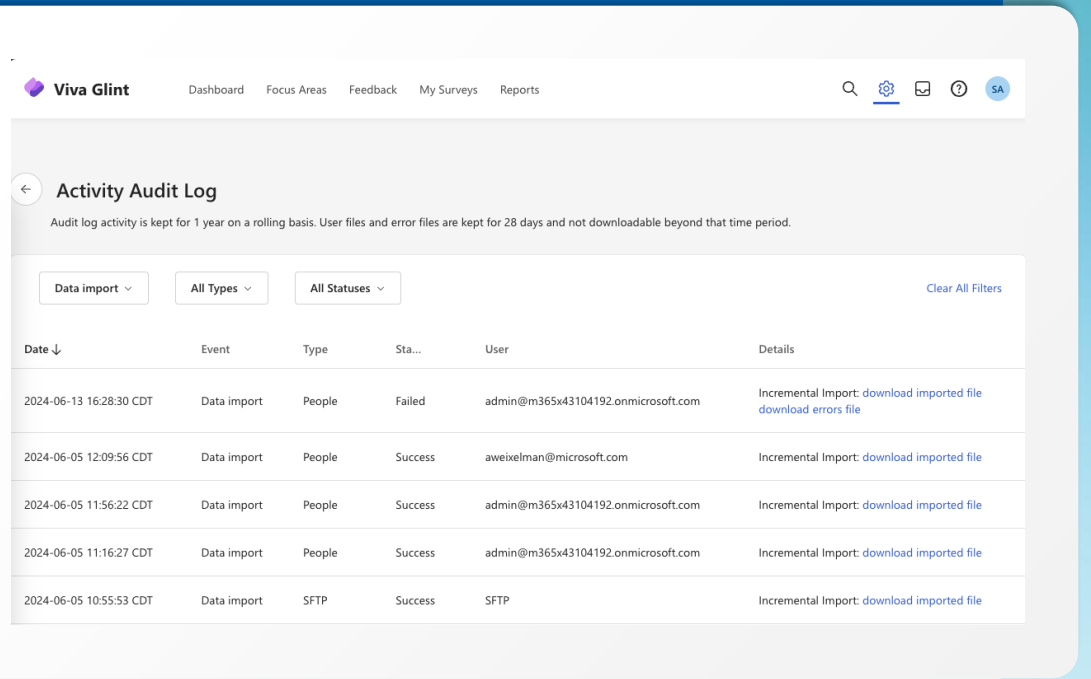
…skip specific rows or columns.

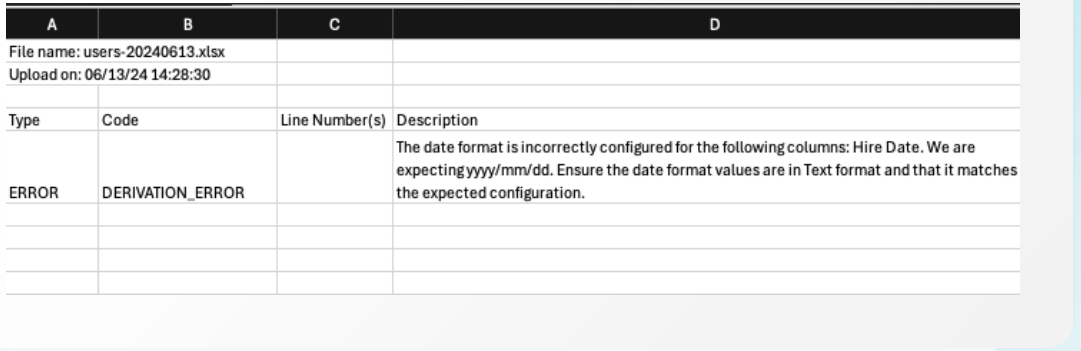
- Duplicated emails or employee IDs
  - Emails and/or IDs are duplicated in the file or between the file and Glint
- Invalid attribute values/ > 64 characters
  - Status other than ‘ACTIVE’ or ‘INACTIVE’
- Unexpected columns
  - New fields not added to attribute setup
- Missing manager IDs/manager records
  - Users (non-CEO) with blank manager IDs
  - Users assigned manager IDs with no matching employee record

Activity Audit Log

As an admin:

- Filter to Event = ‘Data import’ to see employee data activity
- Review file upload history for the past year
- Download employee files from the past 28 days
- Download error files from the past 28 days





A	B	C	D
File name: users-20240613.xlsx			
Upload on: 06/13/24 14:28:30			
Type	Code	Line Number(s)	Description
ERROR	DERIVATION_ERROR		The date format is incorrectly configured for the following columns: Hire Date. We are expecting yyyy/mm/dd. Ensure the date format values are in Text format and that it matches the expected configuration.

Q&A

Microsoft Viva

Thanks for joining!

What topic would you like to see in a future Ask the Experts session?

Scan this code to share your feedback about today's session.

Viva Glint: Ask the Experts feedback

For recordings, decks, and future registrations, bookmark our official Ask the Experts page.
https://adoption.microsoft.com/viva/glint/ask-the-experts-resources/

Appendix

Glossary

HRIS: Human resources information system

SSH: Secure shell, cryptographic network protocol that allows secure communication between two devices over an unsecured network

SFTP: Secure file transfer protocol

IP address: Internet protocol address, numerical value assigned to devices that connect to internet protocol networks

PGP: Pretty Good Privacy, an encryption program that can be used to encrypt data files

Derivation: Glint-calculated fields, including manager hierarchy levels, Tenure, and Age Group

UTF-8 encoding: Unicode transformation format, 8-bit. Most commonly used encoding for the web and supports global language special characters

Key data preparation resources

- Prepare and upload your employee data to Viva Glint | Microsoft Learn
- Viva Glint employee attribute fundamentals | Microsoft Learn
- Viva Glint organizational hierarchy fundamentals | Microsoft Learn
- Create your Viva Glint Employee Attribute Template | Microsoft Learn
- Review employee data with Viva Glint checklists | Microsoft Learn
- Set up attributes in Viva Glint | Microsoft Learn
- Update attributes in Viva Glint | Microsoft Learn
- Choose a data upload method | Microsoft Learn

Key troubleshooting resources

- Resolve file upload errors related to attributes - Viva | Microsoft Learn
- Resolve file upload errors related to derived attributes - Viva | Microsoft Learn
- Resolve file upload warnings related to duplicate data - Viva | Microsoft Learn
- Resolve file upload warnings related to invalid or unexpected values - Viva | Microsoft Learn
- Resolve file upload warnings related to manager hierarchy - Viva | Microsoft Learn

Audience: All Viva Glint customers

Resources for Learning and Connection

- **Learning Paths & Modules** - Online, self-paced training courses
- **Badging** - Become a Viva Glint expert! Earn learning credentials and post to your social media
- **Documentation** - Find technical documentation and guidance to help you through your Viva Glint journey
- **Viva Glint Community** - A space to ask questions and share ideas with experts and peers
- **Newsletter** - Sign up for this monthly email full of info to help you get the most from your Viva Glint programs
- **Viva Glint Blog** - Blogs specific to Viva Glint research and platform updates
- **Live Events** -Think like a People Scientist, Ask the Experts
- **Customer Groups**
  - Product Council - Be part of a community that provides Viva Glint teams with feedback on how we can improve our products and services
  - Learning Circles - Participate in collaborative time to share knowledge, experiences, and challenges with your peers and to grow your understanding and use of Viva Glint products and services.
  - Cohorts – We have created an online space for you to collaborate with fellow customers in your industry, and once a quarter, the Viva Glint cohort team will be hosting a virtual session dedicated to things like relevant topics, Q&As, open discussions.

Resources for Deployment and Support

FastTrack

Audience: New Viva Glint customers

FastTrack can provide deployment help with Microsoft Viva foundational products and capabilities - at no extra cost for the life of your eligible subscription. See eligibility information.

If you've registered for FastTrack and need support: FastTrack for Microsoft Viva

CxPM/Hotline Team

Audience: Migrating Glint customers

Your Glint Customer Experience Program Manager (CxPM) or a dedicated member of the Hotline Support team will guide you through your technical migration to Microsoft Viva Glint. Contact your CxPM or reach out to Hotline Support: VivaGlintMigration@microsoft.com

Support

Audience: All Viva Glint customers

Viva Glint admins:

- Microsoft Admin Center
- Support participants during a live Viva Glint survey

Viva Glint managers:

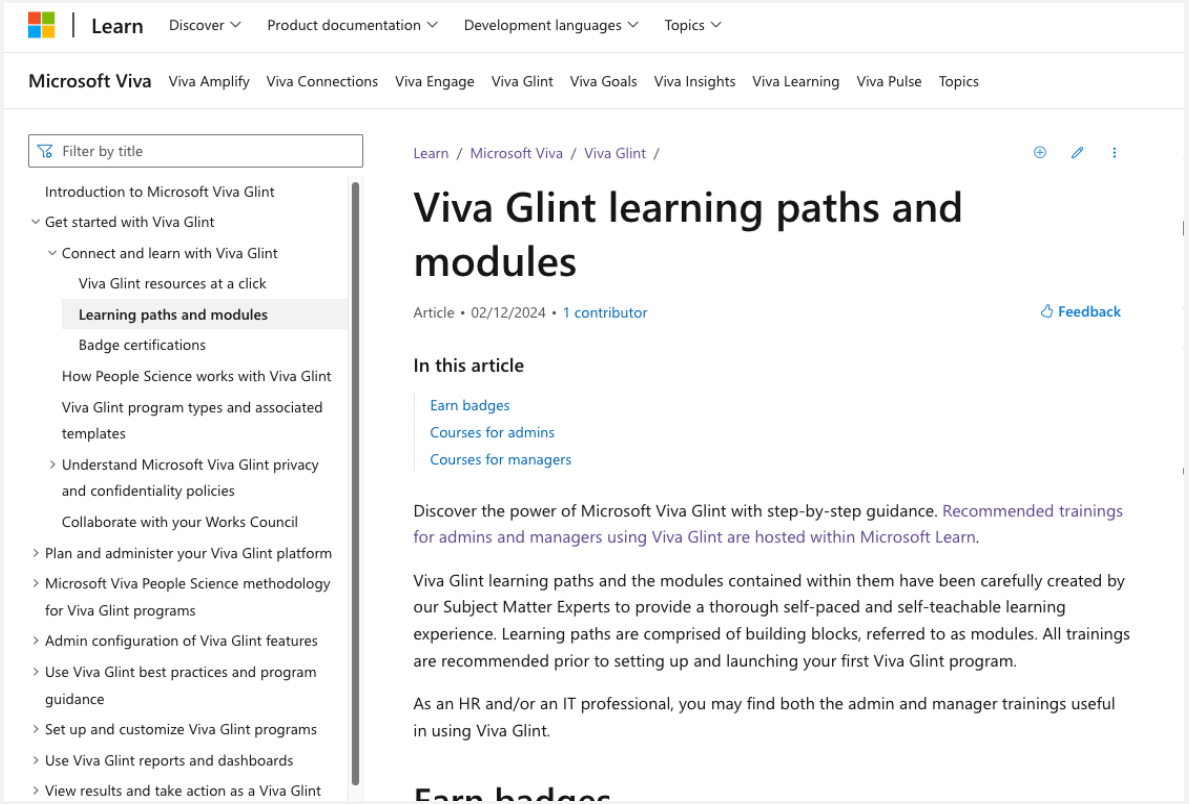
- Viva Glint Manager Quick Guides
- Address Viva Glint access issues as a manager

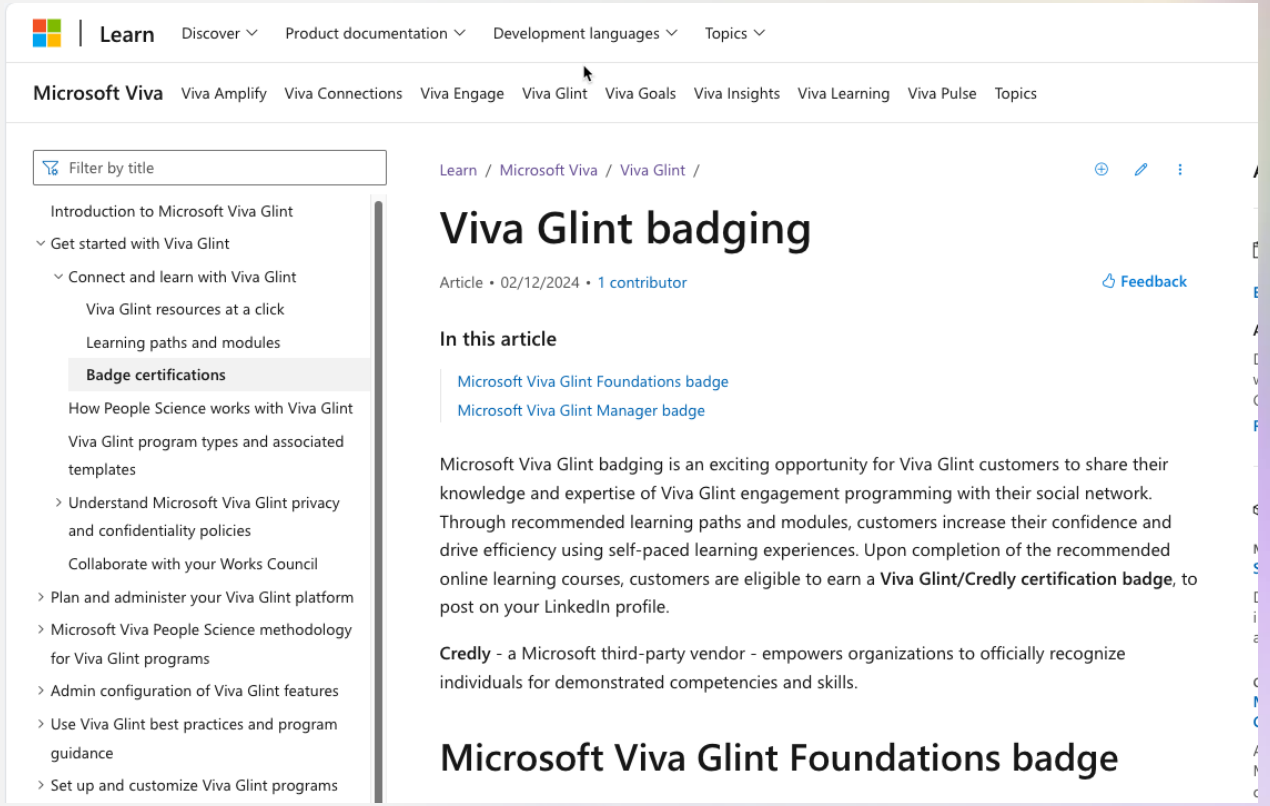
Viva Glint survey participants:

- How to take a Viva Glint survey
- Viva Glint FAQs for survey participants

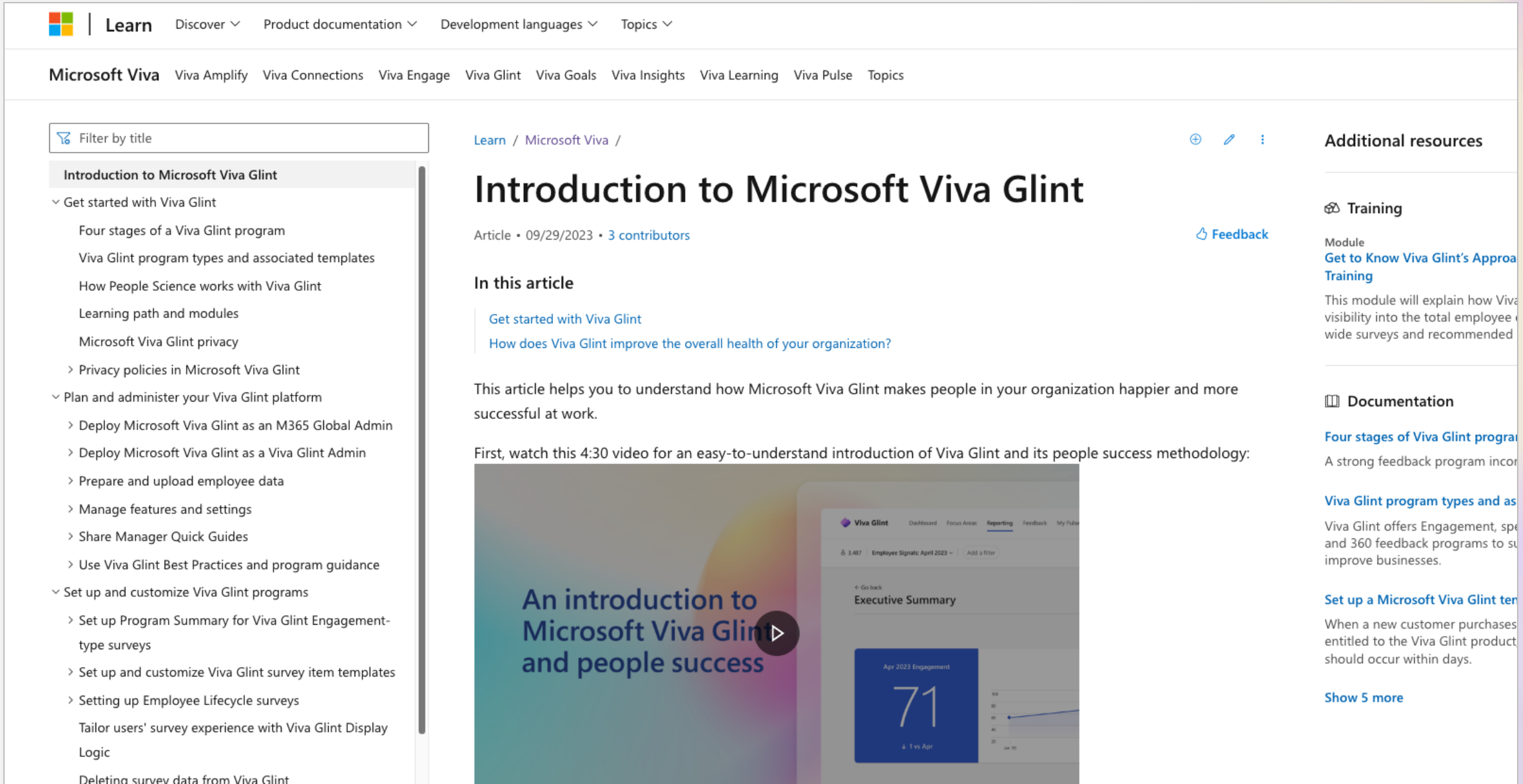
For a list of our training courses, see our Viva Glint Learning Paths and modules page.

For a list of our available badges, see our Viva Glint Badging page.

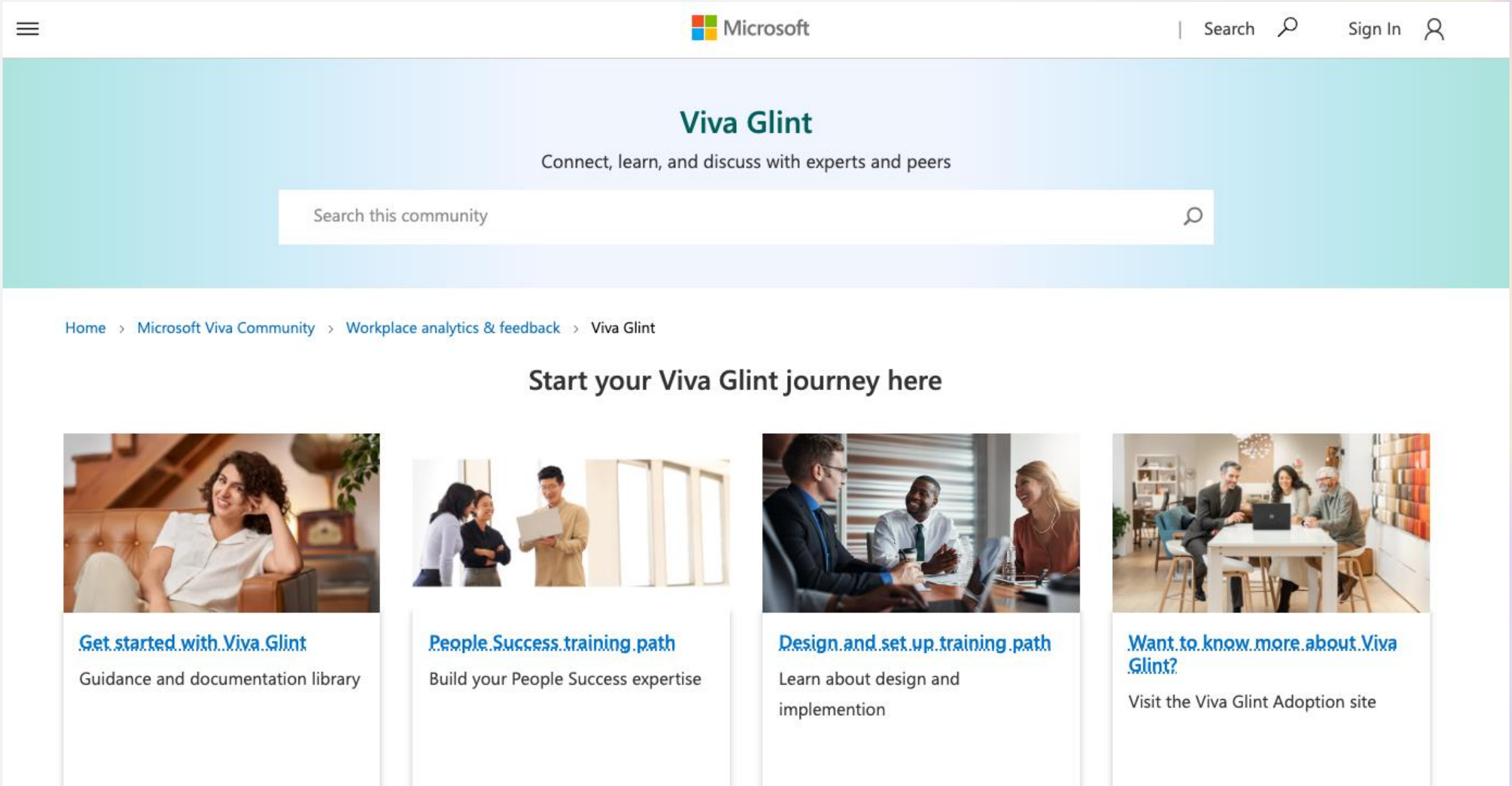




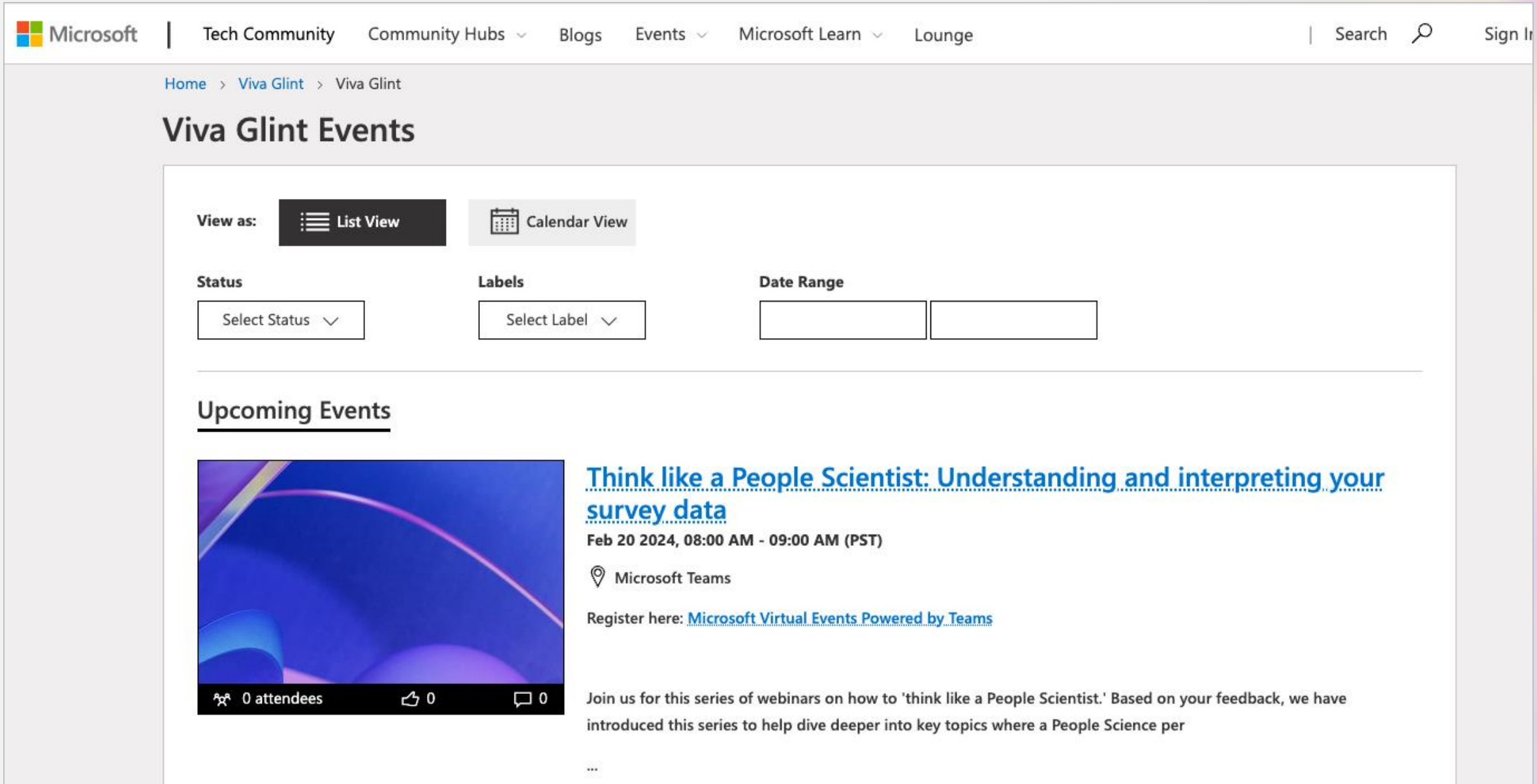
To access our full documentation library,
see [Introduction to Microsoft Viva Glint | Microsoft Learn](#).



Talk to fellow customers, Glint and other Viva app users within the Viva Community. We also have a specific Viva Glint Community just for us where we also post updates and announcements.



Bookmark our live events page to stay updated on our events schedule.



Register for our newsletter to stay up-to-date on releases, events, and anything new at Viva Glint!

Hi Kathryn,

Welcome to the March edition of our Viva Glint newsletter. Our recurring communications will help you get the most out of the Viva Glint product. You can always access the current edition and past editions of the newsletter on our Viva Glint blog.

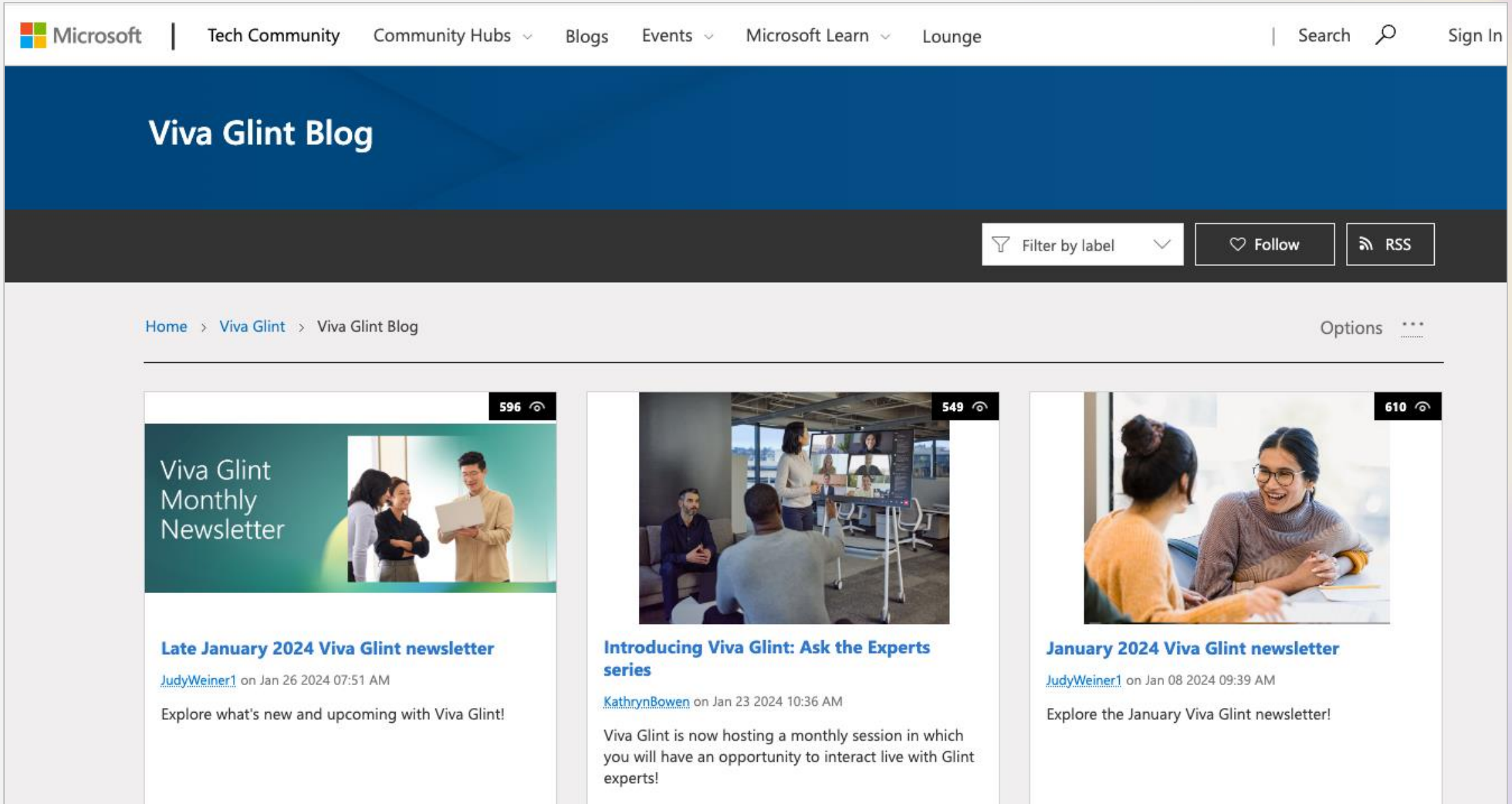
Our next features release date

Viva Glint's next feature release is scheduled for March 9, 2024*. Your dashboard will provide date and timing details two or three days before the release.

In your Viva Glint programs

The Microsoft Copilot Impact Survey template has premiered in the Viva Glint platform. AI tools are increasingly integrated into the workplace to enhance workforce productivity and the employee experience. This transformational shift in work means leaders need to understand their early investments in Microsoft Copilot and how it is being

Check out our Viva Glint blog for our monthly newsletters and other updates.



Join our customer groups to stay connected with fellow customers, our thought leadership experts, and our Product team

Learning Circles

The Learning Circles program offers the opportunity to join a diverse customer group where you can share knowledge, experiences, and challenges with other employee experience professionals and grow your understanding and utilization of Viva Glint. Managed entirely by customers, this is a flexible program to use in the way that works for you.

Product Council

Be part of a community that provides the Viva Glint team with feedback to help shape our product and influence the development of new products through our user experience. Join our Product Council today!

Cohorts

The purpose of our customer cohorts are to facilitate connections between customers grouped by shared background (e.g., industry), shared purpose (e.g., culture transformation) or shared interest (e.g., AI). Through cohorts, customers will have additional access to relevant content and events, discussion, and sharing and networking opportunities. Keep an eye out for its launch in our blog and newsletter.

...and more to come!