

FIELD KEY	DESCRIPTION	REQUIRED	CHARACTER LIMIT	WHAT VALUES SHOULD I ENTER INTO THIS FIELD?	EXAMPLE	WHERE DO THE VALUES DISPLAY?	WHAT HAPPENS IF I LEAVE THIS FIELD BLANK?	ADDITIONAL NOTES
employee_id	The user's employee ID.	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	00123	The value in this field will only be visible in the Admin module and in some reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will return an error.	If your organization's employee IDs have leading zeros, make sure to set the column's format to "plain text". Alternatively, you can enter a single quotation mark before the employee ID (i.e. '00123'). Either method should work to retain the leading zeros. Otherwise, they may be dropped.
email	The user's email address.	Yes	254	Enter a valid email address.	morgan.oconnor@acme.com	The value in this field will be visible throughout the Betterworks application and in reports.	This field can never be left blank. Doing so will always return an error.	NA
first_name	The user's legal first name.	Yes	150	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	Morgan	The value in this field will be visible throughout the Betterworks application and in reports.	This field can never be left blank. Doing so will always return an error.	If there is a value in the preferred_name field, it will override the value in the first_name field (i.e. Morgan O'Connor will display as "Mr O'Connor throughout the Betterworks application).
preferred_name	The user's preferred first name (nickname).	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	Mo	The value in this field will be visible throughout the Betterworks application and in reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will not return an error or clear the value. Only entering "bw_null" will clear the value.	If there is a value in the preferred_name field, it will override the value in the first_name field (i.e. Morgan O'Connor will display as "Mr O'Connor throughout the Betterworks application).
last_name	The user's legal last name (surname).	Yes	150	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	O'Connor	The value in this field will be visible throughout the Betterworks application and in reports.	This field can never be left blank. Doing so will always return an error.	NA
department_name	The user's department (division).	No	140	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	Stock & Inventory Management	The value in this field will be visible throughout the Betterworks application and in reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	If you enter a department name for a department that doesn't yet exist, it will be created automatically. Also, department names are case-sensitive. As such, entering a department name with a different letter case (i.e. Stock & Inventory Management vs. STOCK & INVENTORY MANAGEMENT) will create a duplicate department.
title	The user's job title.	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	Sr. Stock Clerk	The value in this field will be visible throughout the Betterworks application and in reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
phone	The user's phone number.	No	NA	Enter a valid phone number with the country code (any format).	+15551234567	The value in this field will be visible throughout the Betterworks application and in reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	Enter a single quotation mark before the phone number (i.e. '+15555555555'). Otherwise, your spreadsheet application may read the number as a formula due to the plus symbol.
hire_date	The user's hire date (start date).	No	NA	Enter a date (MM/DD/YYYY format).	01/01/2019	The value in this field will only be visible in the Admin module and in some reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will not return an error or clear the value. Only entering "bw_null" will clear the value.	NA
deactivation_date	The user's deactivation date (termination date).	No	NA	Enter a date (MM/DD/YYYY format).	12/31/2024	The value in this field will only be visible in the Admin module and in some reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value and reactivate the user. Entering "bw_null" will also clear the value and reactivate the user.	Excluding users from the completed user data file will not deactivate them. Only providing a deactivation date will. Deactivation dates can be provided in advance. They will be stored for the future. Every hour, the Betterworks application runs a task that checks if there are any users scheduled for deactivation. If there are, those users are deactivated at midnight (in the organization's time zone) on that date. Once the date has passed, those users can be excluded from future completed files.
manager_id	The employee ID of the user's manager (supervisor).	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	00456	The value in this field will only be visible in the Admin module and in some reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value. Entering "bw_null" will also clear the value.	Manager assignments have an impact on what the manager can view and take action on. Managers can view certain data about their direct reports through the Insights module, participate in conversations with their direct reports through the Conversations module, and request feedback on behalf of their direct reports through the Feedback module. Also, a user who is at the top of their organization (i.e. CEO, president, etc.) should not have a manager.
manager_email	The email address of the user's manager (supervisor).	No	254	Enter a valid email address.	awry.valentine@acme.com	The value in this field will be visible throughout the Betterworks application and in reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value. Entering "bw_null" will also clear the value.	Manager assignments have an impact on what the manager can view and take action on. Managers can view certain data about their direct reports through the Insights module, participate in conversations with their direct reports through the Conversations module, and request feedback on behalf of their direct reports through the Feedback module. Also, a user who is at the top of their organization (i.e. CEO, president, etc.) should not have a manager.
location	The user's location.	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	Illinois, US	The value in this field will only be visible in the Admin module and in some reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
locale	The language that the user is most comfortable reading.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>- cs = Czech</li> <li>- de = German</li> <li>- da = Danish</li> <li>- en = English</li> <li>- en_GB = English (United Kingdom)</li> <li>- es = Spanish</li> <li>- es_AR = Spanish (Argentina)</li> <li>- fr = French</li> <li>- fr_CA = French (Canada)</li> <li>- hi = Hindi</li> <li>- hr = Croatian</li> <li>- hu = Hungarian</li> <li>- it = Italian</li> <li>- ja = Japanese</li> <li>- ko = Korean</li> <li>- nl = Dutch</li> <li>- no = Norwegian</li> <li>- pl_PL = Polish (Poland)</li> <li>- pt_BR = Portuguese (Brazil)</li> <li>- ro = Romanian</li> <li>- ru = Russian</li> <li>- sk = Slovak</li> <li>- sv = Swedish</li> <li>- th = Thai</li> <li>- tr = Turkish</li> <li>- vi = Vietnamese</li> <li>- zh_Hans = Chinese (Simplified Han)</li> <li>- zh_Hant = Chinese (Traditional Han)</li> </ul>	en	The value in this field will only be visible in the Admin module and in some reports.	You do not need to enter a value in this field. By default, the Betterworks application will use the language selected at the organization level. However, once a value has been entered, leaving this field blank will not return an error or clear the value. Only entering "bw_null" will clear the value.	The Betterworks application will be translated into the language associated with the provided value.
on_leave	Whether or not the user is on leave.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>- true</li> <li>- false</li> </ul>	false	The value in this field will only be visible in the Admin module and in some reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value. The Betterworks application will then read the blank field as "true".	Users who are on leave will still be included in scheduled conversations and/or scheduled feedback cycles unless cycle participation is based on a department, group or participant file that the user is excluded from.
matrix_manager	The leader who the user reports during a project, but who is not their manager.	No	254	Enter a valid email address.	richard.jarvis@acme.com	The value in this field will only be visible in the Admin module and in some reports.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_employment_type	The user's classification based on their work hours.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>- full time</li> <li>- fulltime</li> <li>- part time</li> <li>- part-time</li> </ul>	part-time	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_ftc_factor	The total hours worked per week by the user, divided by the total hours in a full-time workweek.	No	NA	Enter a decimal number no larger than 1.0.	0.5	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_level	The user's job level within the organization.	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	A2	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_job_band	The user's salary, pay band, or grade.	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	Grade 2	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_critical_employee_status	Whether or not the user's role (not the user themselves) is critical to the organization.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>- true</li> <li>- false</li> <li>- critical</li> <li>- non-critical</li> <li>- noncritical</li> </ul>	non-critical	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_work_location	The user's work location.	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	Branch 2379	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_city_town	The city or town that the user is located in.	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	Chicago	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_state	The state or province that the user is located in.	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	Illinois	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_country	The country or sovereign nation that the user is located in.	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	United States	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA

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ep_region	The region within a country, continent or group of continents that the user is located in.	No	NA	Enter ASCII and/or UTF-8 characters. This includes letters, numbers, and various symbols.	North America	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_birth_date	The user's birth date.	No	NA	Enter a date (MM/DD/YYYY format).	07/15/1990	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_pronouns	The user's self-identified pronouns, which reflect their gender identity and how they wish to be addressed.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>-he</li> <li>-she</li> <li>-they</li> <li>-he/they</li> <li>-she/they</li> <li>-ze</li> <li>-ze</li> <li>-I do not wish to disclose</li> <li>-unknown</li> </ul>	she	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_gender_identity	The user's self-identified gender, reflecting their personal gender experience and identity.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>-man</li> <li>-woman</li> <li>-transgender man</li> <li>-transgender woman</li> <li>-two spirit</li> <li>-two-spirit</li> <li>-gender</li> <li>-fluid</li> <li>-queer</li> <li>-non binary</li> <li>-non-binary</li> <li>-nonconforming</li> <li>-agender</li> <li>-decline to answer</li> <li>-I do not wish to disclose</li> <li>-unknown</li> </ul>	woman	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_lgbtq2_identity	The user's self-identified sexual orientation or gender identity within the LGBTQ2+ community.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>-gay</li> <li>-straight</li> <li>-heterosexual</li> <li>-lesbian</li> <li>-bisexual</li> <li>-pansexual</li> <li>-2 spirit</li> <li>-two spirit</li> <li>-two-spirit</li> <li>-queer</li> <li>-questioning</li> <li>-asexual</li> <li>-other</li> <li>-n/a</li> <li>-decline to answer</li> <li>-I do not wish to disclose</li> </ul>	decline to answer	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_disability_status	Whether or not the user is disabled.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>-y</li> <li>-n</li> <li>-e</li> <li>-yes</li> <li>-no</li> <li>-with a disability</li> <li>-no disability</li> <li>-mental</li> <li>-sensory impairment</li> <li>-physical impairment</li> <li>-unknown</li> </ul>	yes	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_veteran_status	Whether or not the user is a military veteran.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>-y</li> <li>-n</li> <li>-yes</li> <li>-no</li> <li>-true</li> <li>-false</li> <li>-veteran</li> <li>-non veteran</li> <li>-I am not a veteran</li> <li>-identify as a veteran just not a protected veteran</li> <li>-identify as one or more of the classifications of protected veterans</li> <li>-I do not wish to self-identify</li> <li>-unknown</li> </ul>	no	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_ethnicity	The user's self-identified racial or ethnic background.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>-african american</li> <li>-american indian or alaska native</li> <li>-asian</li> <li>-black</li> <li>-black or african american</li> <li>-hispanic or latino</li> <li>-latino</li> <li>-native hawaiian or other pacific islander</li> <li>-hawaiian</li> <li>-indian</li> <li>-native american</li> <li>-middle eastern</li> <li>-white</li> <li>-two or more</li> <li>-other</li> <li>-unknown</li> </ul>	two or more	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	The available value options reflect a broad spectrum of racial and ethnic categories, including, but not limited to specific races, cultural identities, and regional ancestries.
ep_underrepresented_group_status	Whether or not the user is part of a group who has been denied access and/or suffered past institutional discrimination in the United States according to the Census and other federal measuring tools.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>-yes</li> <li>-no</li> <li>-underrepresented</li> <li>-non-underrepresented</li> <li>-non-underrepresented</li> </ul>	underrepresented	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA
ep_voluntary_exit	Whether or not the user left the organization voluntarily.	No	NA	Enter one of the following values: <ul style="list-style-type: none"> <li>-yes</li> <li>-no</li> <li>-unknown</li> </ul>	yes	The value in this field will only be visible in Advanced Analytics.	You do not need to enter a value in this field. However, once a value has been provided to the Betterworks application, leaving this field blank will clear the value.	NA