## Integrating AFAS with My Effectory

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# Effectory. Leading in employee feedback

www.effectory.com

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### 1. Summary

This article aims to help you understand the key data requirements and prerequisites to set up and run a successful integration of your AFAS employee data with My Effectory. You can learn what data attributes to share, the context in which we process your employee data, and follow a detailed setup guide for your integration (Chapters 5 and 6).

## 2. Why should I integrate my employee data with Effectory?

Integrating My Effectory with your AFAS environment can help you save time and reduce the risk of (human) errors if you have many employees and deal with frequent updates on your employee data. Automating your data exchange with My Effectory also enables you to make use of our continuous features. However, be aware that automation decreases flexibility, meaning manual data changes are no longer possible. If you need help deciding whether data integration fits your context, contact your Customer Success or Project Manager at Effectory.

## 3. Your employee data in the context of My Effectory

To run surveys and manage employee data on My Effectory efficiently, we need to give meaning to your employee data. That means we will match your employee data to the context of My Effectory. For example, for you to be able to invite participants to surveys, we need data attributes such as first name, last name, and e-mail address. If you include Birthdates, you can run comparisons between age groups. For you to build your organization



and reporting structure, data such as company name, department, team, etc., will be necessary.

#### Data you should not share with us

Effectory should not receive any personally sensitive data. This includes, but is not limited to:

- Social security number
- Political opinion
- Religion
- Health-related data
- Trade-union membership

If you are in doubt about including specific data attributes, you can consult with your Customer Success or Project Manager at Effectory.

## 4. Data attributes you can add to make the most out of My

## Effectory

Below we have listed all data attribute fields that are provided with our <u>GetConnector</u> template. You can download it now or when you start your integration setup on My Effectory. In addition, we have listed attributes that we **recommend** for you to make the most out of the My Effectory features. You can modify the template to fit your specific context and add or remove fields as you see fit. However, please use the GetConnector template and refrain from building your own template from scratch. This will ensure a swift and smooth finalization of your integration request.

Automatically provided attributes with the GetConnector template

- Medewerker ID (Employee-ID)
- Volgnummer (Order number)
- Emailadres (E-mail address)
- Initialen (Initials)
- Voornaam (First Name)
- Voorvoegsel (Last Name Prefix)
- Achternaam (Last Name)
- Geboortedatum (Birth date)
- Geslacht (Gender)
- Leeftijd (Age)
- Dienstjaren (Years in service)
- Functie (Function/Position)

- Taal (Language)
- ManagerVoornaam (Manager First Name)
- ManagerAchternaam (Manager Last Name)
- ManagerE-mailadres (Manager E-mail Address)
- Laag0 (Level 0)
- Laag1 (Level 1)
- Laag2 (Level 2)
- Laag3 (Level 3)
- Laag4 (Level 4)
- Laag5 (Level 5)
- Laag6 (Level 6)
- Laag7 (Level 7)
- Laag8 (Level 8)
- Laag9 (Level 9)
- DatumInDienst (Date in service / Hire date)
- DatumUitDienst (Date out of service / Termination date)
- Reden\_einde\_dienstverband (Reason for end of employment contract)
- Initiatief\_einde\_dienstverband (Initiative for end of employment contract)
- Aantal\_uren\_per\_week (Working hours per week)
- Totaal\_FTE (FTE)

Recommended attributes to add (choose the ones that apply to you)

- Subcompany
- Office
- Department
- Team
- Cost centers
- Employee type



## 5. Configure AFAS for My Effectory

To integrate AFAS with My Effectory, you must first start configuring My Effectory in your AFAS environment. For that, download our template <u>GetConnector</u> and import it to AFAS.

**Step 1:** Log in to the AFAS portal and go to "Algemeen" > "Uitvoer" > "Beheer" > "GetConnector."



**Step 2:** A new window will pop up with all available Get Connectors. Go to "4. Importeren" > click "Bestand" > select our template GetConnector file > click "Voltooien"

**Step 3:** The template Get Connector is now imported. Check if all correct fields are used based on the **essential data attributes** Effectory needs. You can add **additional attributes** that we recommend here too. Check <u>chapter 4.</u> In this article, to look up all attributes, we have listed.



Step 4: Create a new user group

Go to Algemeen > Beheer > Autorisatie tool. Click "Nieuwe gebruikersgroep" > select "Maak een geheel nieuwe gebruikersgroep".

Nieuwe gebruikersgroe	p						×
	🔿 Kopieer een best	aande gebruikersgroep (i	ncl. autorisatie)				
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	Deze weergave bev	at geen regels					
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Click on "Volgende" and fill in a **name** and **description** for this group. For example, "Effectory." > Select "Handmatig (H)" to add users manually later > Click on "Voltooien."

Groep:	Effectory	
Omschrijving:	Effectory	
Geblokkeerd		
Gebruikersgroep vuller	n	
Vullen op basis van:	H Handmatig	
Selectie:		
Tijdelijk gebruikersgroe	p op medewerker toestaan	
Voorbeeld: De helpdesk is onderbem	and en medewerkers met andere functies helpen tijdelijk in de bezetting van de	
helpdesk.		

Step 5: Create Effectory as a new system user

Click "Gebruiker" > "Nieuwe systeem gebruiker" > fill in the fields. For example, you can create a **username** as "12345.Effectory" based on your **Environment ID number**. Click on "Volgende" > fill in the rest of the steps > Click "Voltooien"

Algemeen			
Gebruiker:	12345.Effectory		
Omschriivina:	GetConnector MvEffectory		
Geblokkeerd			

#### → Good to know

Steps 4 and 5 are **one way** of creating a user and a user group. Feel free to follow a setup path that works best for you.

Some general guidance when you create a connector user

- The connector user needs to be a system user
- Give it a clear and recognizable name. For example, "12345.effectory"
- Create a separate system user for each app connector (this doesn't cost you any licenses)
- Restrict rights to only what is needed
- Deselect the following settings: Profit & InSite
- Add this connector user only to the user group that is specifically created for this

Step 6: Now add Effectory as a new user to the group you just created
Click on the group > select "Gebruikers in groep" > click "Nieuw" and add the user.
Note: Make sure both your new user and group have access to the required data →
Medewerker Actuele gegeven.

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ADM2	Administratie 2			
ADM3	Administratie 3	AndreO	Anare de Oude	
ADM4	Administratie 4	AnnetK	Annet Kamaker - van Kalken	
ADM5	Administratie 5	ArendB	Arena te Bogter	
APL	Applicatiebeheerder	BeatnjsB	Beatrijs Boot	
Effectory	Effectory Integratie	Bedrijfsarts	Albert Jansen	
EffectoryIntegration	EffectoryIntegration	BenH	Ben Hoomweg	
ledereen	Alle Profit gebruikers	CasperK	Casper de Korte	
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Laag 4	MDW: Laag 4 - <omschrijving></omschrijving>	DavidB		
Laag 5	MDW: Laag 5 - <omschrijving></omschrijving>	Demo	Kees Zandbergen	
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Laag 8	MDW: Laag 8 - <omschrijving></omschrijving>		OK Annuleren	
NoEmployees	User that does not have access to employees			
PR-001	Functioneel applicatiebeheer (Profit)			
PR-003	Sitebeheer (Profit)			
PR-004	Documentbeheer (Profit)			
PR-005	Workflowmanagement (Profit)			
PR-006	Externe toegang: connector gebruikers (Profit)			
PR-007	Prijzen/tarieven (Profit)			
PR-008	Facturatie (Profit)			
PR-009	Externe toegang: partnerkoppeling (Profit)			
PR-010	Facturatie applicatiebeheer (Profit)			
PR-011	Autorisatie testen (Profit)			
PR-051	Cursusmanagement (Profit)			
PR-052	Relatiebeheer (Profit)			
PR-053	Campagnes (Profit)			
PR-101	Financieel applicatiebeheer (Profit)			
PR-102	Controlling (Profit)			
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**Great job so far!** You have imported the GetConnector template, created a new "Effectory" user group and added "Effectory" as a user to that group.

 $\rightarrow$  Now, you can go ahead and finish the final steps to connect your AFAS environment with My Effectory.



#### Step 7: Create a new App Connector

Go to "Algemeen" > "Beheer" > "App connector". Click "Nieuw" > fill in a **name** for the connector > select the (Effectory) **user group** that you have created in the **previous step** > click "Voltooien".

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Autorisatie						
Alle aebruikers di	e behoren tot de onderstaande gebruikersgroe	ep hebben toegang tot deze app con	nector.			
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Gebruike	rsgroep	— 🗆	×			
Gebruikerse	aroep - 🝸 - 📑 - 🔽 - 🔒 🛛 >	> 83 Reaels				
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Effectory	Effectory Integratie	Handmatin				
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	MDW: Laag 1 - <omschrijving></omschrijving>	Selectie				
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Laag 1 Laag 2	MDW: Laag 2 - <omschrijving></omschrijving>	Selectie				
Laag 1 Laag 2 Laag 3	MDW: Laag 2 - <omschrijving> MDW: Laag 3 - <omschrijving></omschrijving></omschrijving>	Selectie Selectie				
Laag 1 Laag 2 Laag 3 Laag 4	MDW: Laag 2 - <omschrijving> MDW: Laag 3 - <omschrijving> MDW: Laag 4 - <omschrijving></omschrijving></omschrijving></omschrijving>	Selectie Selectie Selectie				
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**Step 8:** Open the created App Connector > go to Algemeen > deselect the "**geblokkeerd**" option > go to the tab "GetConnectoren" > click "Nieuw" > **search and select our template** Get Connector called **"Effectory MedewerkerGegevens"** > click on "Voltooien."

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#### Step 9: Create an API token

Open the created App Connector via "Algemeen" > "Beheer" > "App connector." Go to the tab "Gebruikerstokens" > click on "Nieuw" > select the **(Effectory) user** created in the previous steps > fill in a **unique description** and click on "Volgende" > copy the API token from this screen and keep it.

**Note:** This is the only time the token will be visible. If you lose the token, you can easily create a new one by repeating **Step 9**.

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	LUI						
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Tabbladen •••			GetConnec	toren			
Algemeen	Nieuwe gebruikerst	oken				×	
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#### Step 10: Retrieve your Environment ID

On to the "Algemeen" tab > go to "Omgeving" > "Beheer" > "Informatie". You will find the "Deelnemersnummer". This is your Environment ID. Copy and keep it for the next step.

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**Final step:** Copy the API token and Environment ID if you haven't already, and head over to My Effectory to set up your integration request.

**Note:** This information is strictly confidential! Keep in mind that you are responsible for providing it in a secure way.



## 6. Start the set-up of your AFAS integration on My Effectory

Now you can go ahead and integrate your AFAS environment on My Effectory.

First, log in to My Effectory > Select the "Organization" tab on the left > click on "HR System integrations" > Select AFAS from the list of HR Systems.

••• •• ••	Organization > HR system Integration	> Set up AFAS integration	
Home     Employees     Frojects     Action plan     Analytics	Congenitation 7 instruction integration Congenitation Coordinators Congenitation coordinators Coursey design templates Coordinators Co	See up ArAs Integration HR system integration Grave time and effort by connecting your HR system To integrate with My Effectory select your HR system click on "Start set up" to continue. FAS HR Software Retrieves employee data from AFAS and shores it with My Effectory. Start setup →	Nath My Effectory. Your care employee data will 24 hours.
Organization		Persionio     Retrieves employee data from Persionio     and shares it with My Effectory.     Stort setup →	

Step 1: Configure AFAS for My Effectory

Click directly "continue" if you have followed the configuration tutorial from <u>chapter 5</u>, and have your API token and Environment ID at hand.

2	Organization > HR system integration >	Set up AFAS Integration
	General settings	AFAS HR Integration
Home	発 Organization coordinators	Start setting up your integration by completing the steps below. Afterward, we will finalize and activate it
Employees	🕞 Survey design templates	tor you.
Projects	HR system integration	bownload full instruction manual
Action plan		
Analytics		Configure AFAS for My Effectory     First, download the template GetConnector and import it to AFAS. Then
Organization		configure AFAS for My Effectory, following our step-by-step guide.
		Download GetConnector
		If you downloaded the GetConnector and finished the configuration previously, you can continue directly.
		Continue +
		2 Provide integration credentials
		3 Double-check the received data
		(4) Send request for completion



**Step 2:** Connect Effectory with AFAS > paste the API token and Environment ID you have copied from AFAS > click on "Continue."

**Step 3:** After establishing the connection, your employee data file will be generated. Click "**Download and review data**" to verify that your data matches the listed checkpoints. You can consult your Customer Success or Project manager at Effectory for support.

Step 4: To finish up, click "Send request," and we will pick it up from there.

#### Great job!

We will work on finalizing your integration and activate it shortly after!

## 7. FAQ

- How frequently will the data runs take place?
   The data runs will be processed every 24 hours. We can also configure it hourly by setting a specific number of hours between two runs.
- 2. Will I get notifications when something goes wrong with a data run?You will have an in-tool dashboard to monitor the status of all data runs.
- 3. Can I still make manual changes to my data on My Effectory?
   Manual changes won't be possible. However, when you update the data in your HR system, changes will automatically apply with the next run.
- 4. Can I get data transformations?

- Data transformations are possible but exceed the standard setup process. Please <u>get in touch</u> with us to align your requests.