

Integrating AFAS with My Effectory

February 2023



Effectory. Leading in employee feedback

www.effectory.com



1. SUMMARY

2. WHY SHOULD I INTEGRATE MY EMPLOYEE DATA WITH EFFECTORY?

3. YOUR EMPLOYEE DATA IN THE CONTEXT OF MY EFFECTORY

4. DATA ATTRIBUTES YOU CAN ADD TO MAKE THE MOST OUT OF MY EFFECTORY

5. CONFIGURE AFAS FOR MY EFFECTORY

6. START THE SET-UP OF YOUR AFAS INTEGRATION ON MY EFFECTORY

7. FAQ

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

Effactory 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 Effactory.

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

Below we have listed all data attribute fields that are provided with our [GetConnector](#) template. You can download it now or when you start your integration setup on My Effactory. In addition, we have listed attributes that we **recommend** for you to make the most out of the My Effactory 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)

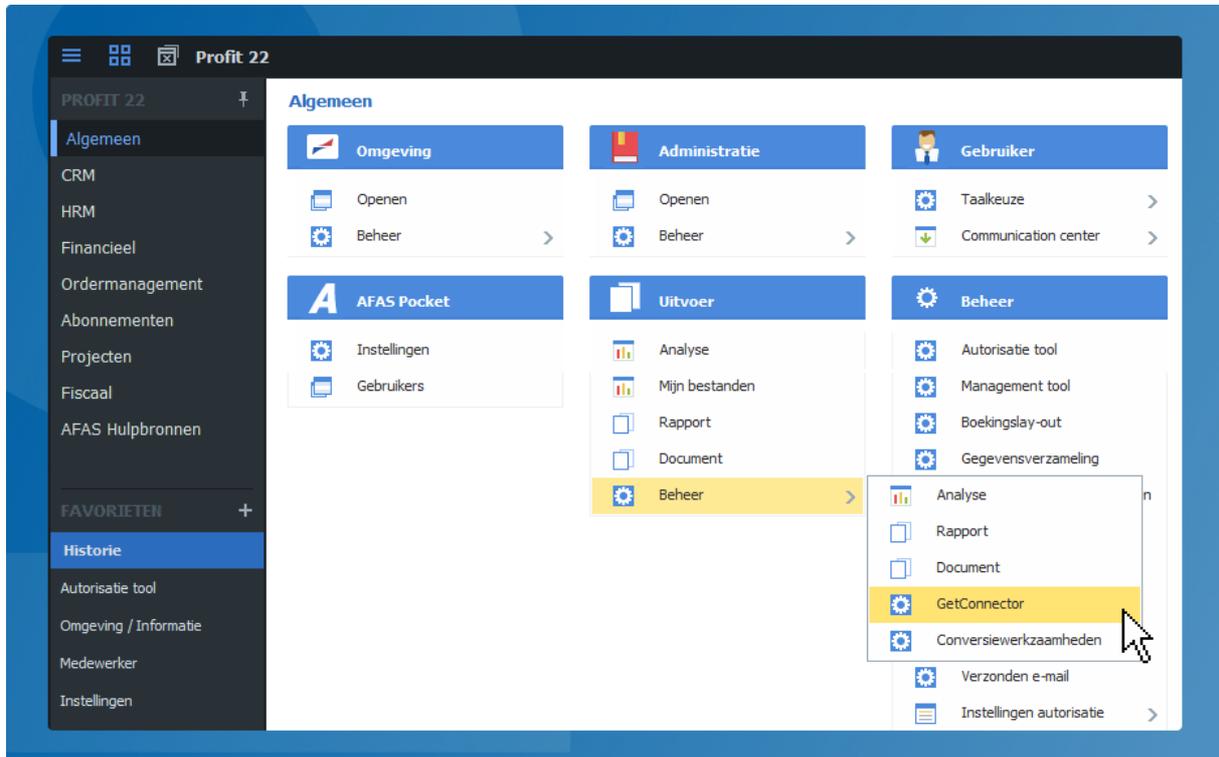
- Subcompany
- Office
- Department
- Team
- Cost centers
- Employee type



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 [GetConnector](#) and import it to AFAS.

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



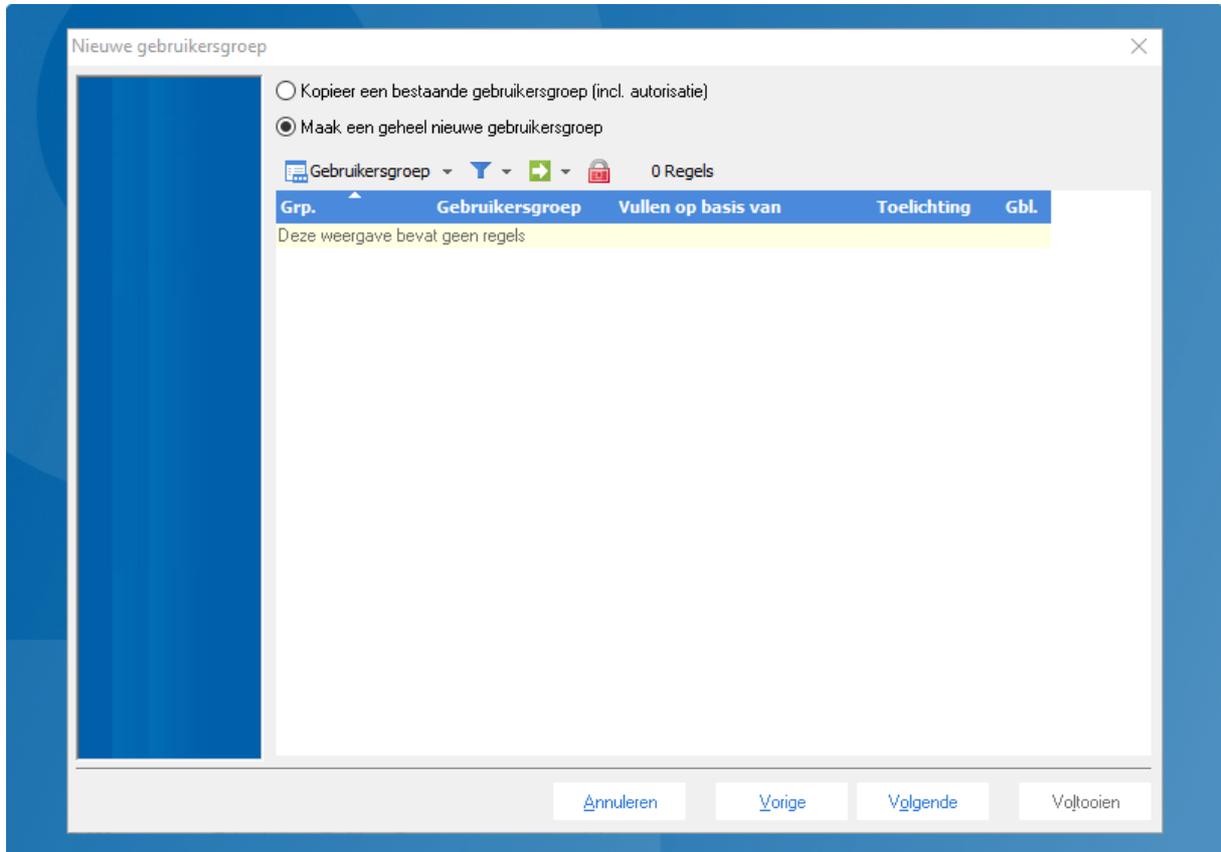
Step 2: A new window will pop up with all available Get Connectors. Go to “4. Importeren” > click “Bestand” > select our template GetConnector file > click “Voltooien”

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 [chapter 4](#). 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".





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.”

Nieuwe gebruikersgroep

Groep:

Omschrijving:

Geblokkeerd

Gebruikersgroep vullen

Vullen op basis van: ... Handmatig

Selectie: ...

Tijdelijk gebruikersgroep op medewerker toestaan

Schakel deze optie alleen in als je deze gebruikersgroep beschikbaar wilt maken om tijdelijk toe te voegen op medewerkersniveau.

Voorbeeld:
De helpdesk is onderbemand en medewerkers met andere functies helpen tijdelijk in de bezetting van de helpdesk.

[Annuleren](#) [Vorige](#) [Volgende](#) [Voltooien](#)



Step 5: Create Effactory as a new system user

Click “Gebruiker” > “Nieuwe systeem gebruiker” > fill in the fields. For example, you can create a **username** as “12345.Effactory” based on your **Environment ID number**.

Click on “Volgende” > fill in the rest of the steps > Click “Voltooien”

Nieuwe systeemgebruiker

Algemeen

Gebruiker: 12345.Effactory

Omschrijving: GetConnector MyEffactory|

Geblokkeerd

Annuleren Vorige Volgende Voltooien

→ **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.effactory”
- 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

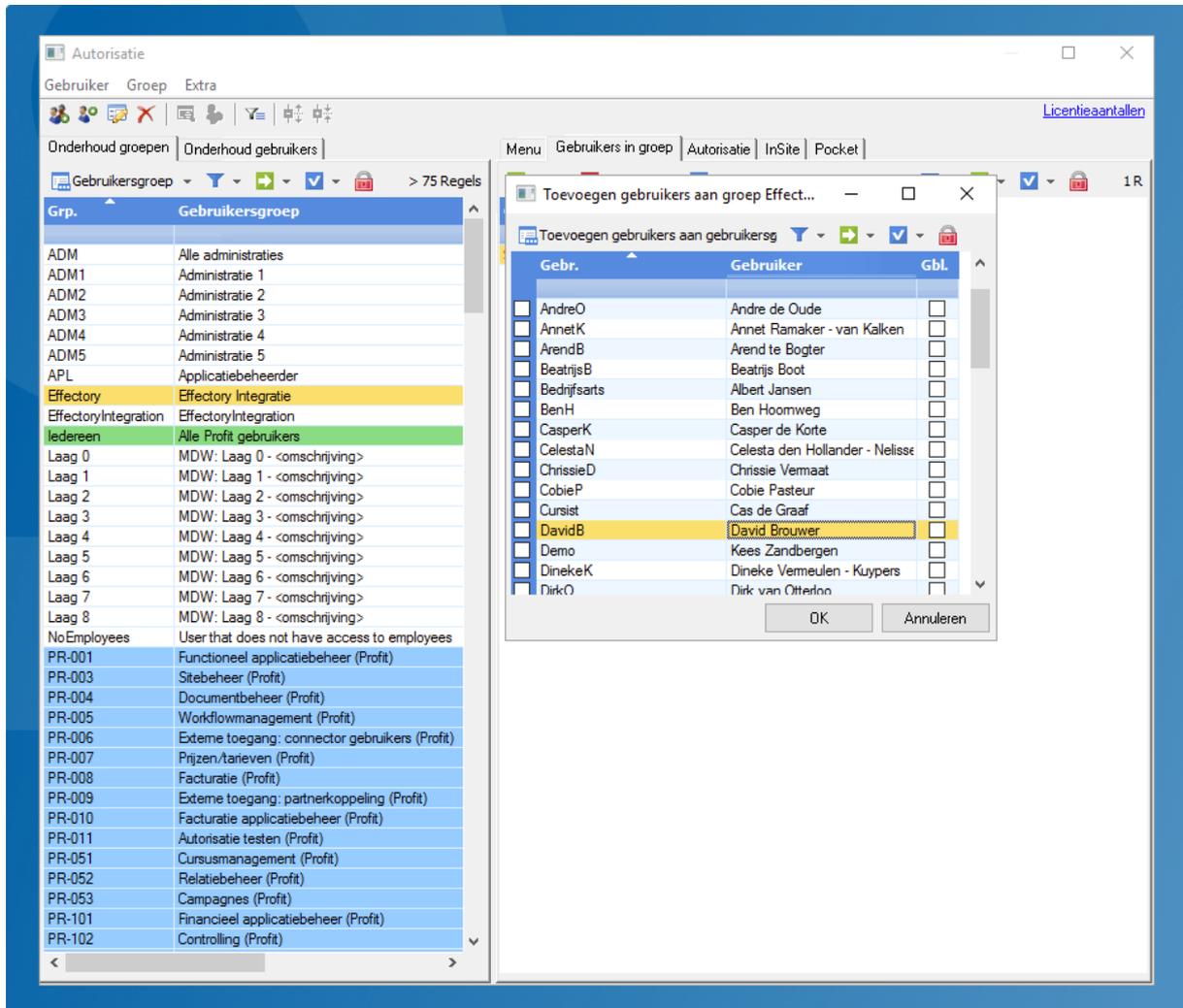


Step 6: Now add Effectory as a new user to the group you just created

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.



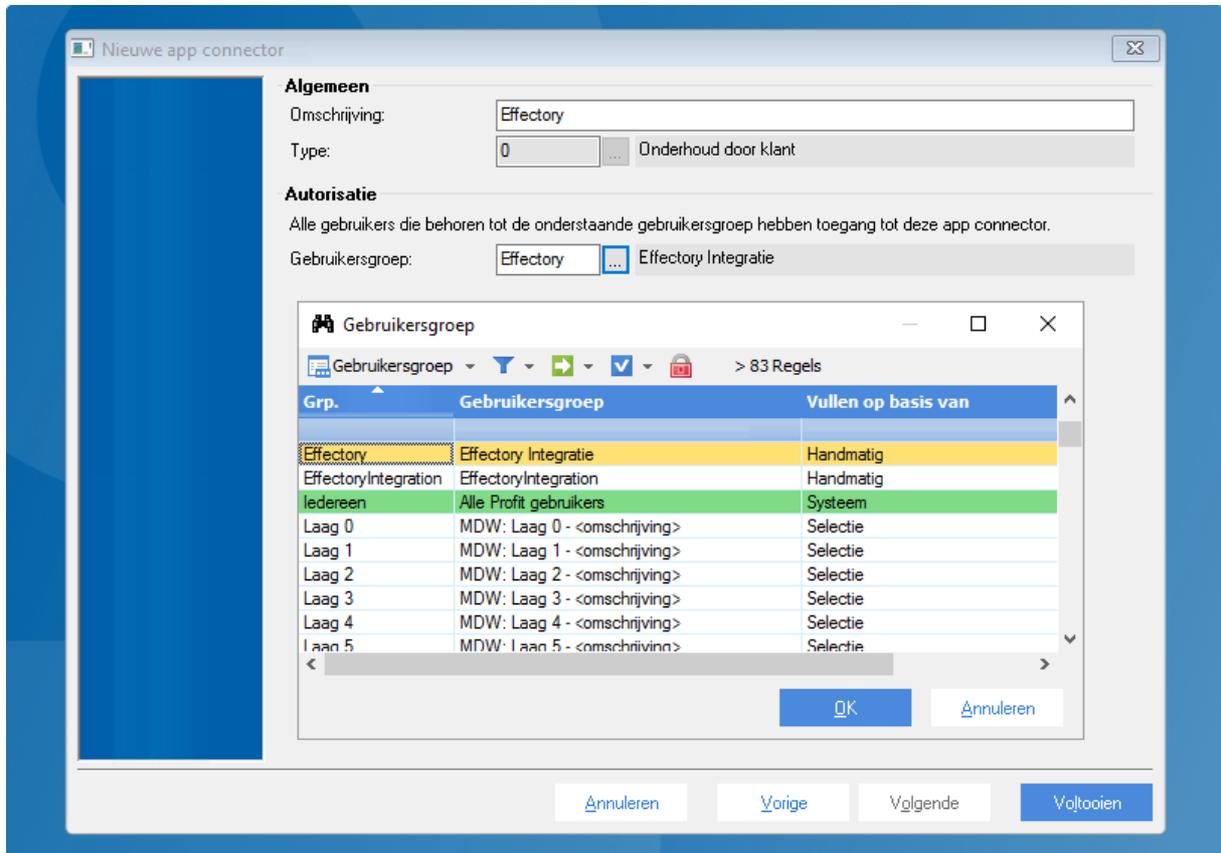
Great job so far! You have imported the GetConnector template, created a new “Effectory” user group and added “Effectory” as a user to that group.

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



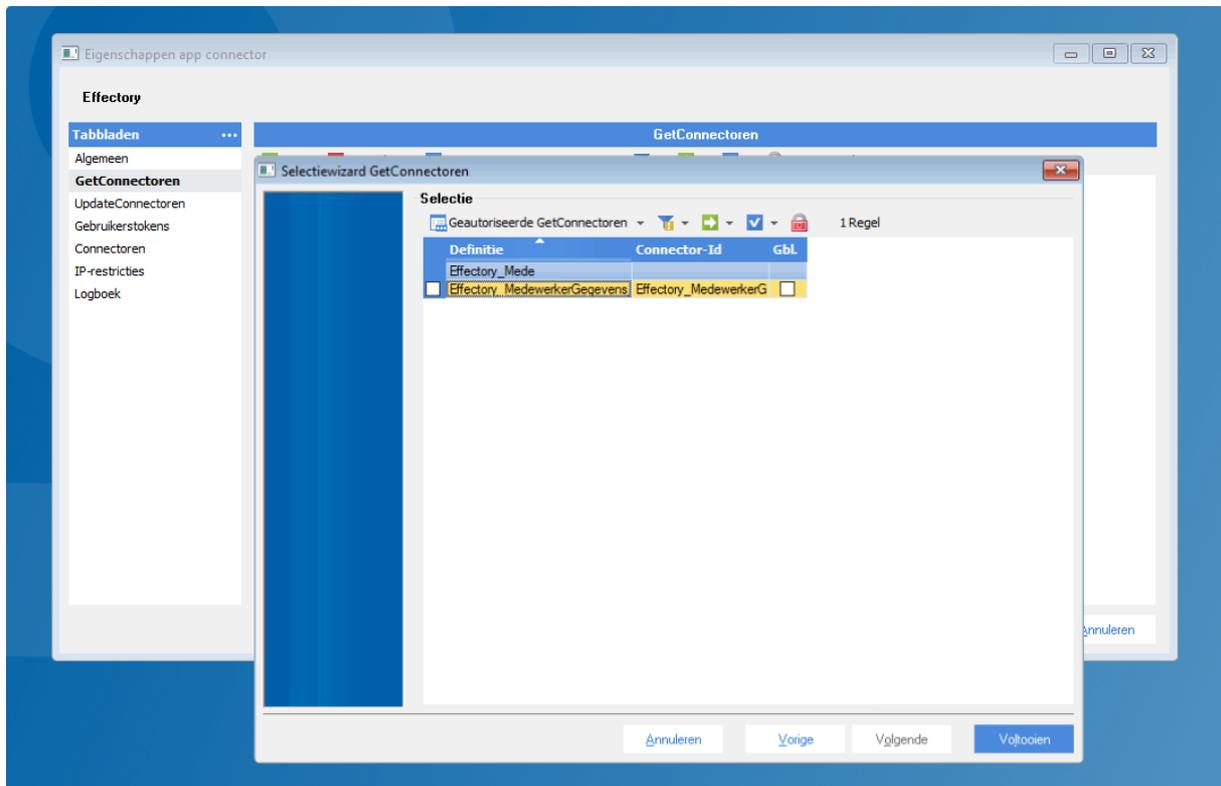
Step 7: Create a new App Connector

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





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 **“Effactory MedewerkerGegevens”** > click on **“Voltooien.”**



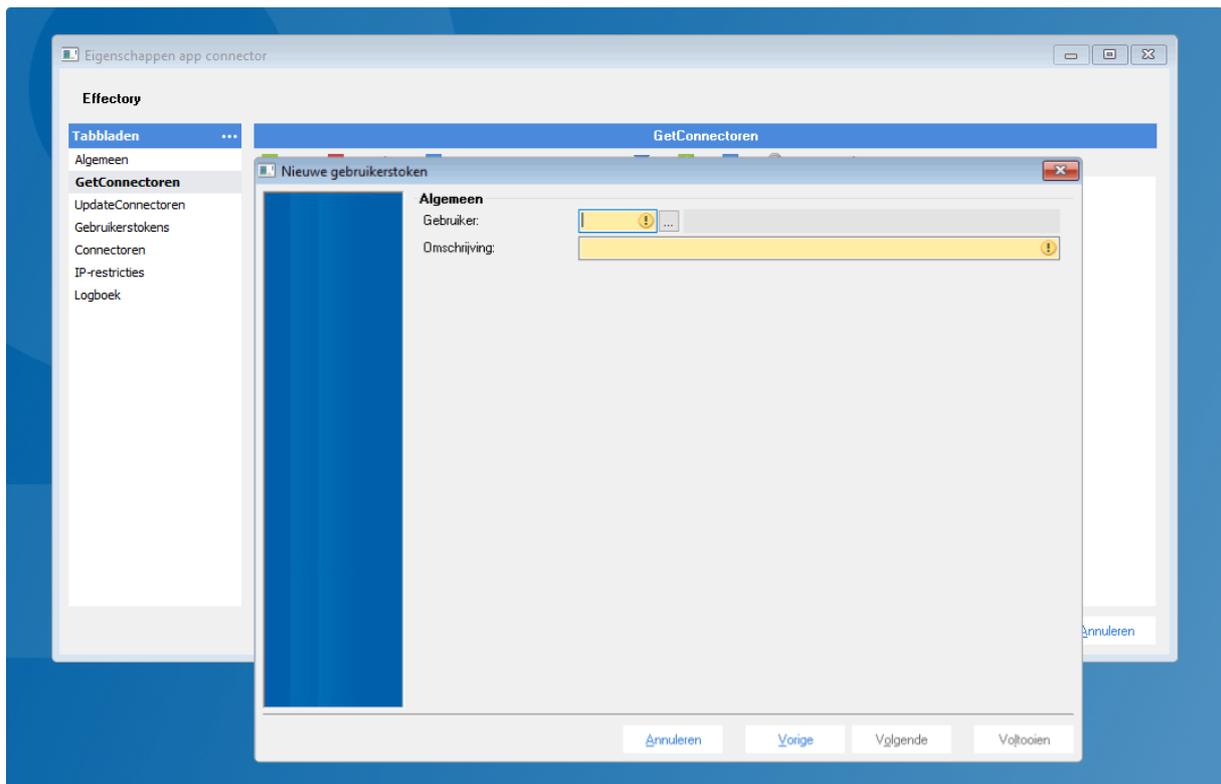


Step 9: Create an API token

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.

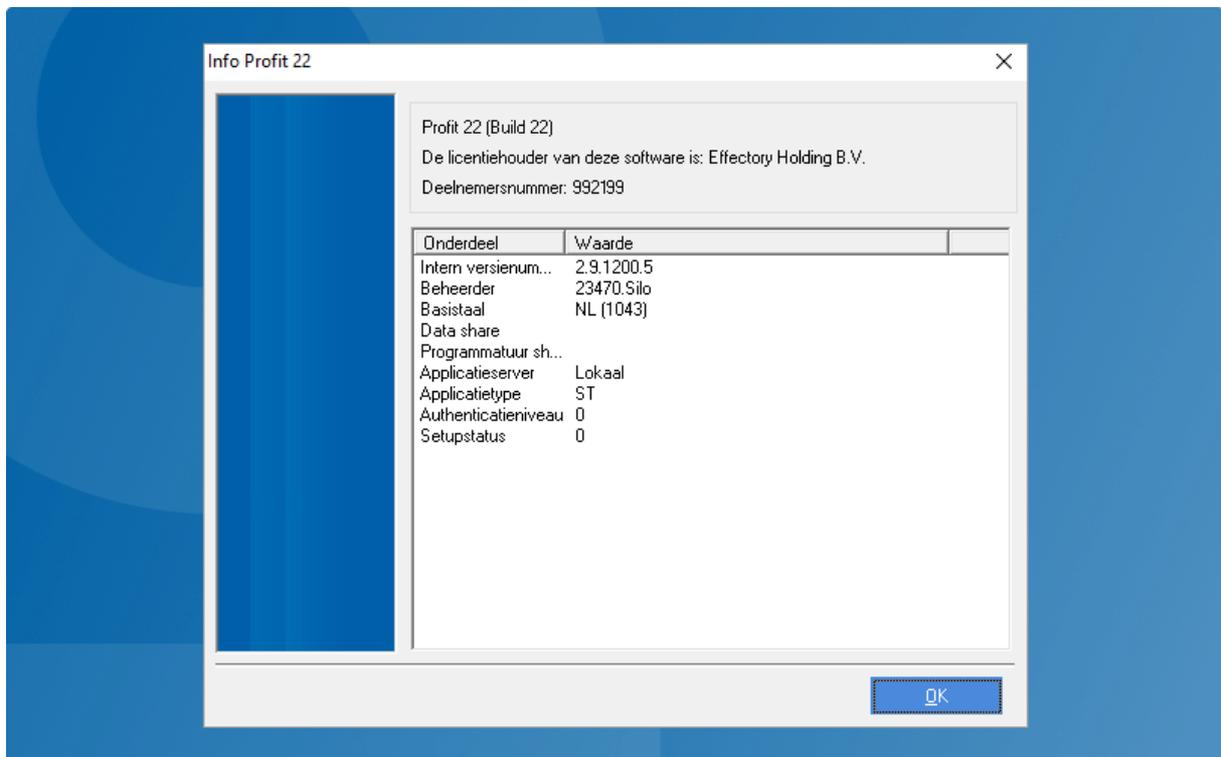
Note: This is the only time the token will be visible. If you lose the token, you can easily create a new one by repeating **Step 9**.





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.



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.

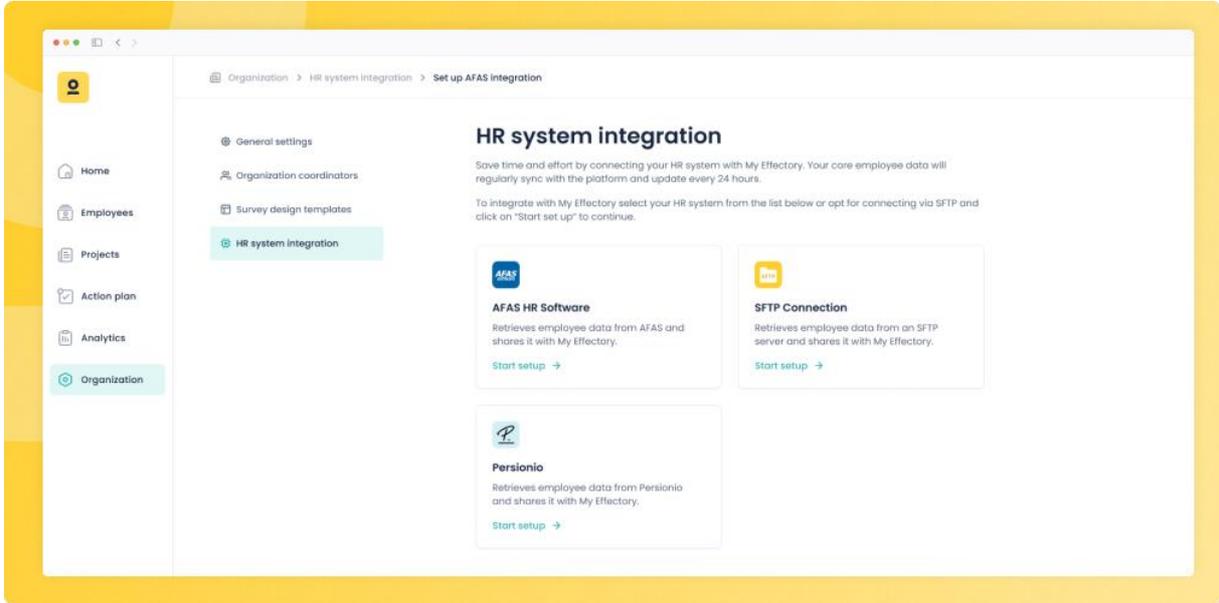
Note: This information is strictly confidential! Keep in mind that you are responsible for providing it in a secure way.



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

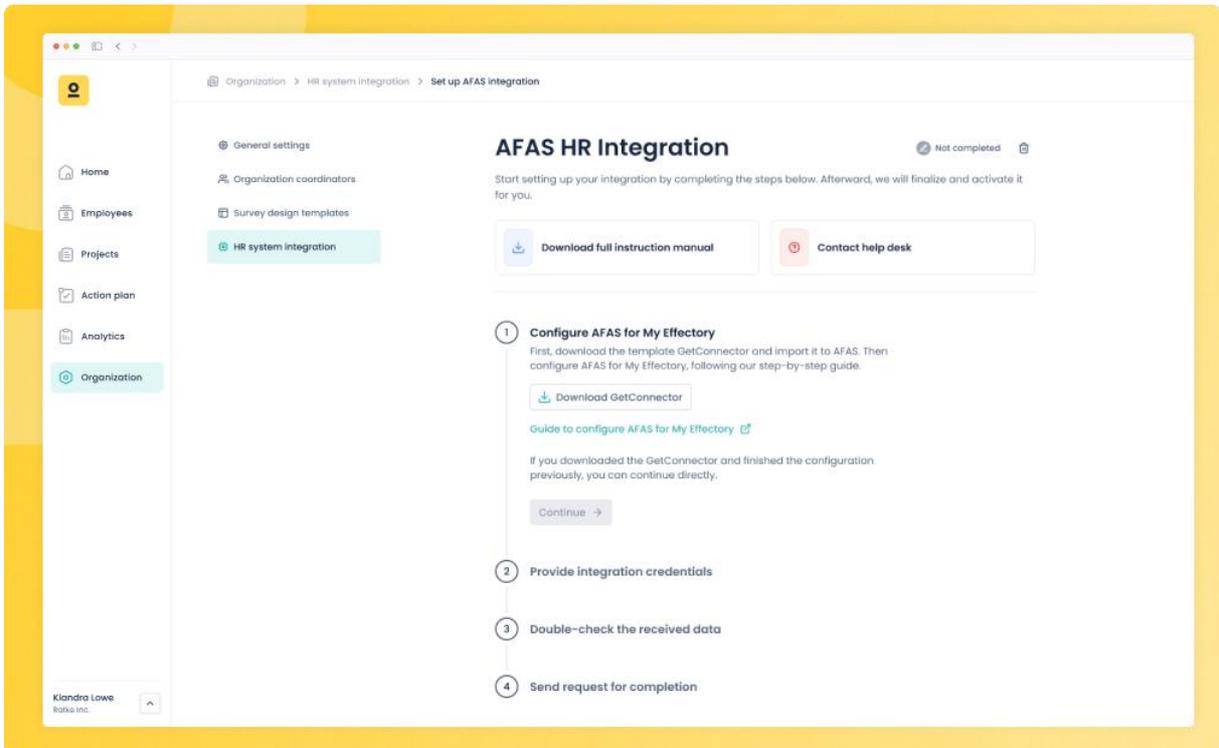
Now you can go ahead and integrate your AFAS environment on My Effectory.

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.



Step 1: Configure AFAS for My Effectory

Click directly “continue” if you have followed the configuration tutorial from [chapter 5](#), and have your API token and Environment ID at hand.





Step 2: Connect Effactory 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 Effactory 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

1. *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 Effactory?*
 - 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 [get in touch](#) with us to align your requests.