

Integrating your employee data with My Effectory

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Effectory. Leading in employee feedback

www.effectory.com



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1. Summary

This article will help you understand the key requirements for successfully integrating your employee data with My Effectory. Learn about the context in which we process your data and how to share your employee data using an SFTP connection.

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

If you have many employees and deal with frequent updates on your employee data, integrating your data with My Effectory can help you save time and reduce the risk of (human) errors. Automating your data exchange with My Effectory also enables you to use 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 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 such as first name, last name, and e-mail address. If you include birthdates, you can run comparisons between age groups. 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 there is any doubt about including specific data, you can consult with your Customer Success Manager at Effectory.



4. Preparation for SFTP File Integration

With SFTP file integration, you can safely share your data with My Effectory by uploading your employee files to our SFTP server. Before you connect with the SFTP server, ensure the following requirements are met.

File requirements

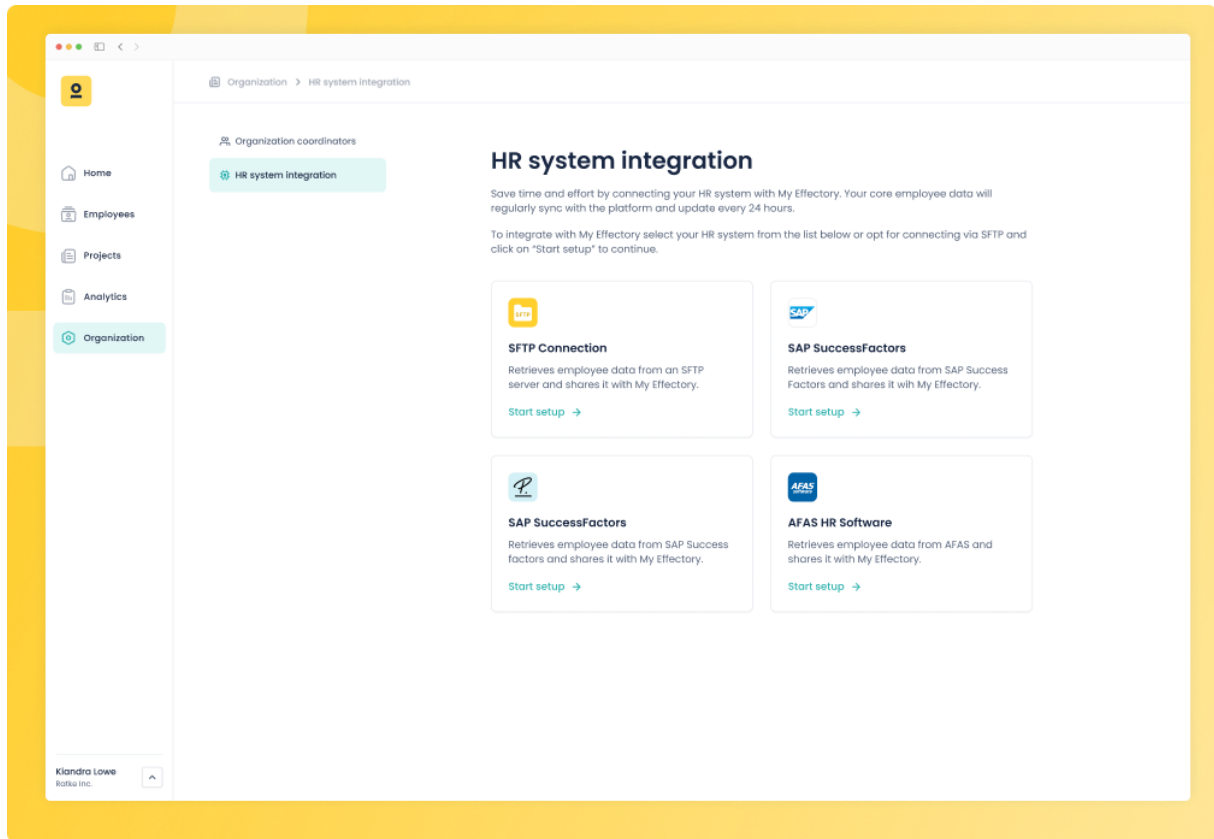
You can export a file with your employee data from your HR system or create the file programmatically. Keep in mind that we only accept **CSV files** [preferably comma separated]. Ensure that your CSV file always contains a **first row with column headers**, which specify the column's content (for example, *First name*, *Email*, etc.). The column headers will have the same names in our system as in your file. However, we can configure them to have different naming if needed.

Date format

Choose **one date format** you want to use to keep your file consistent and let us know which one you are using. We prefer the following date format: yyyy-mm-dd.

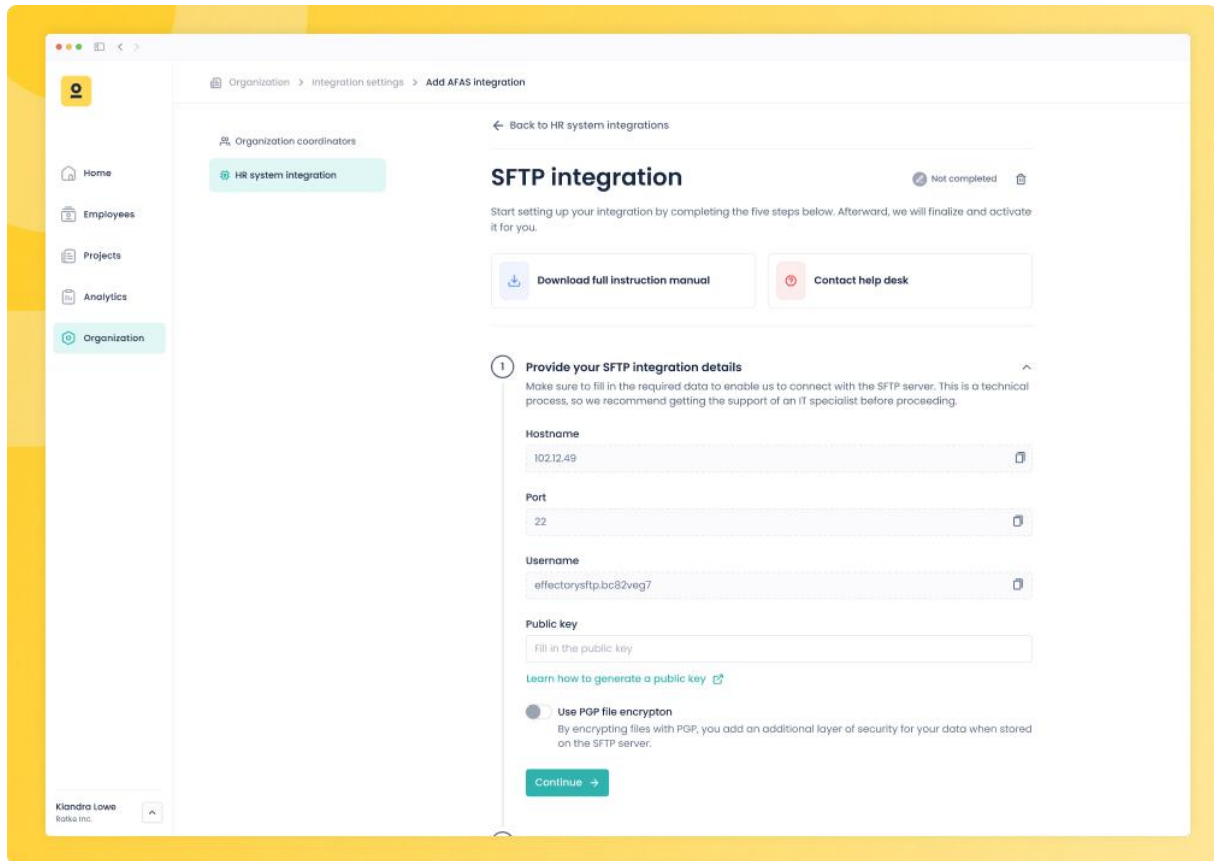
5. Connecting to the Effectory SFTP server

First, log in to My Effectory > Select the **Organization** tab on the left > click on **HR System integrations** > Select **SFTP Connection** from the list of integrations.



Step 1: Retrieve the required credentials to connect with the SFTP server.

The SFTP server is hosted by Effectory. Copy the credentials provided in Step 1 and generate a public key to connect to it.



We are using a public/private key pair. Make sure to generate this key in the **RSA-SSH2 format** and with a minimum size of 2048 bits. Here you can find more information on how to create the key pair: <https://www.ssh.com/ssh/keygen/>

Fill in the public key you have generated and click **Continue**. You can enable **PGP file encryption** if you want to add an additional layer of security when storing your data.



Organization > Integration settings > Add AFAS integration

Organization coordinators

HR system integration

Home
Employees
Projects
Analytics
Organization

Port
22

Username
effactorysftp.bc82veg7

Public key
ssh-rsa AAAAB3NzaC1yc2EAAAADAQABAAQGDGslXCIIGA2yucGk0/94x16VDDaQJRGwg39GW...

[Learn how to generate a public key](#)

Use PGP file encryption

By encrypting files with PGP, you add an additional layer of security for your data when stored on the SFTP server.

- To add an additional layer of security encrypt your files use the following public key.

PGP Public Key

```
-----BEGIN PGP PUBLIC KEY BLOCK-----
mIsEYThDAEEAJnP+bndSqh6kDcSxcG0rDlVpDRsqBHVHEpJURgw+2atlHXh2pxJkb32MM
amrJlBqHxRG3pDlwG3vC0XQ6s3mSy0LmDaBTV82Mzaikc8DBfIkHvbjVS/06qVXBCD
qu2e3qqw3skDo54wySD2M4uduT2qXVVK6QEzH+XalDTAAUTlBprGFsZwQucmFteml
AZW2m2WNOb3J5lMnVbYicBBABAgAGBQJHmJEAAoJEJQu2CO3ZaZSlQD/ItKQ/58n9
n0B7o6lmtToVQavGpqaQtaf42+FlUfgcFWiq2HbdG6N2BGIQn+DWukfgO/
uITebA8TAYRV+/Zw4VQ499bI22i0urMollQ+xcz7kw6HjW9pa2pEYyO2kPVQn7Xth/
sBP7m3P0nBy9od29Fgr/hhkQuK7pumi98cP=IGWB
-----END PGP PUBLIC KEY BLOCK-----
```

- Rename the encrypted file with the .pgp extension (e.g., file.csv becomes file.csv.pgp).
- Upload the encrypted files to the SFTP server.
- Our system will decrypt files with the .pgp extension during synchronisation

[Continue](#)

2 Double-check the received data

Klandra Lowe
Ratko Inc.



Step 2: Verify your configuration.

First, upload a test file to the SFTP server. This file should contain a representative sample of the data you want to share with the server, matching the required format and including relevant data fields.

Now you can download the test file under step 2. Click **Download and review data** to verify that your data matches the listed checkpoints. You can consult your Customer Success Manager at Effectory for support during this step.

Step 3: If you are satisfied with the quality of the data set and all configurations, 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!

6. 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 specific 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 or employee file, 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 request.