Integrating Personio with My Effectory

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Effectory. Leading in employee feedback

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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 PERSONIO FOR MY EFFECTORY

6. START THE SET-UP OF YOUR PERSONIO 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 Personio employee data with My Effectory. You can learn what data attributes to include and exclude, the context in which we process your employee data, and follow a detailed setup guide for your integration.

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

Integrating My Effectory with your Personio 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.

<u>Data you should **not share** with us</u>

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 project manager or customer success manager at Effectory.

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

Before you begin the integration setup, you need to determine what data attributes from Personio you want to share with My Effectory. To help you with that, we have listed attributes for you to add and exclude.

Automatically provided attributes

Personio adds this attribute automatically. Make sure to provide the corresponding data.

- Employee ID – A unique employee number to identify each person

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

- FirstName
- LastName
- E-mail
- Gender
- Hire date
- Termination date
- Birthday
- Function / Job title
- Weekly hours
- Language
- Subcompany
- Office
- Department
- Team
- Cost centers
- Employee type
- Supervisor – Includes manager first name, manager last name, and manager e-mail address

Employees to **filter out** from your data transfer to My Effectory

Since Personio has no way of filtering your employee data, make sure to filter employees out that are not required to be in your data transfer to My Effectory.

→ **Inactive employees**

My Effectory features and services (such as surveys) are only relevant for your active employees. Therefore, employees who have not started or are no longer in service should be filtered out. **Make sure to select** the attributes **"Hire date"** and "**Termination date"** so we can filter them out automatically.

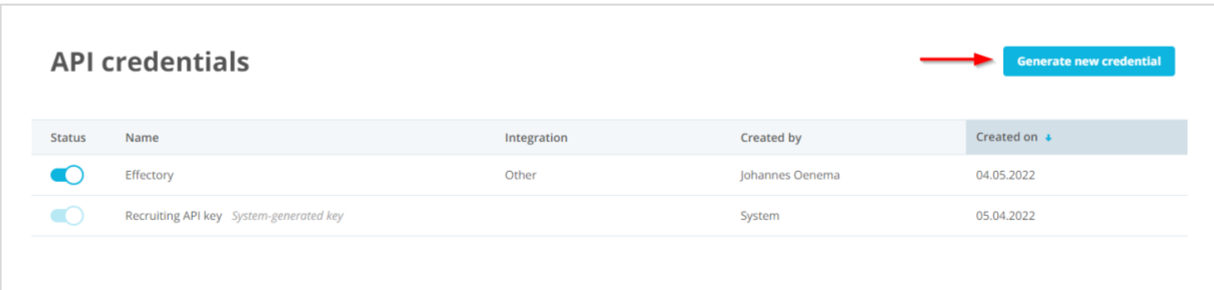
→ **Other employees or external persons**

Suppose you have external persons in your Personio data or employees you do not want to include in My Effectory. In that case, you can build the custom attribute, **"Exclude in transfer to Effectory,"** with the value set to **"Yes."** You can find more information on this on your Personio settings page.

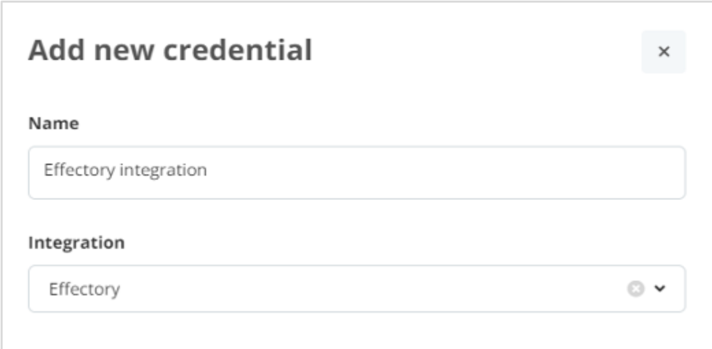
5. Configure Personio for My Effectory

To integrate Personio with My Effectory, you must first start configuring My Effectory in your Personio environment.

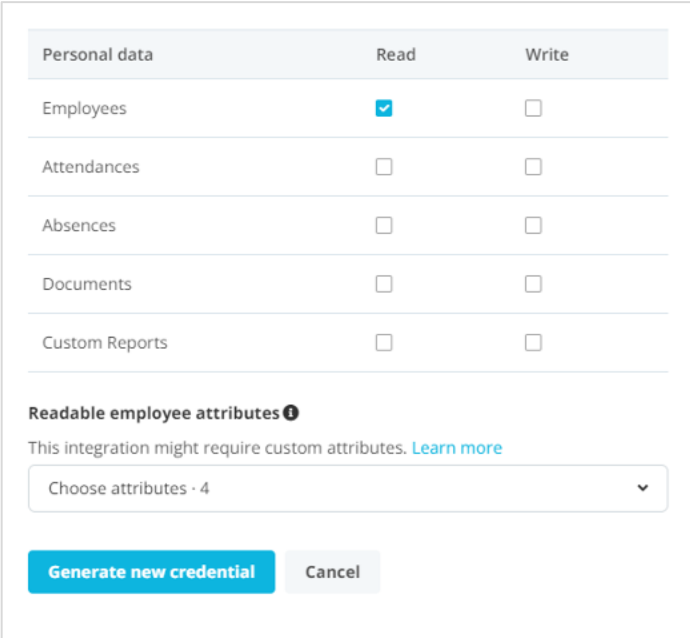
Step 1: Log in to Personio > go to Settings > click on "**API credentials**" > click on "**Generate new credential.**"



Step 2: Choose a credential **name** > select **Effectory** from the dropdown menu.



Step 3: Select the "**Employees**" endpoint > click on "**Readable employee data attributes**" and select additional attributes you want to use in My Effectory.
Tip: Check [chapter 4.](#) in this document to look up attributes we recommend!



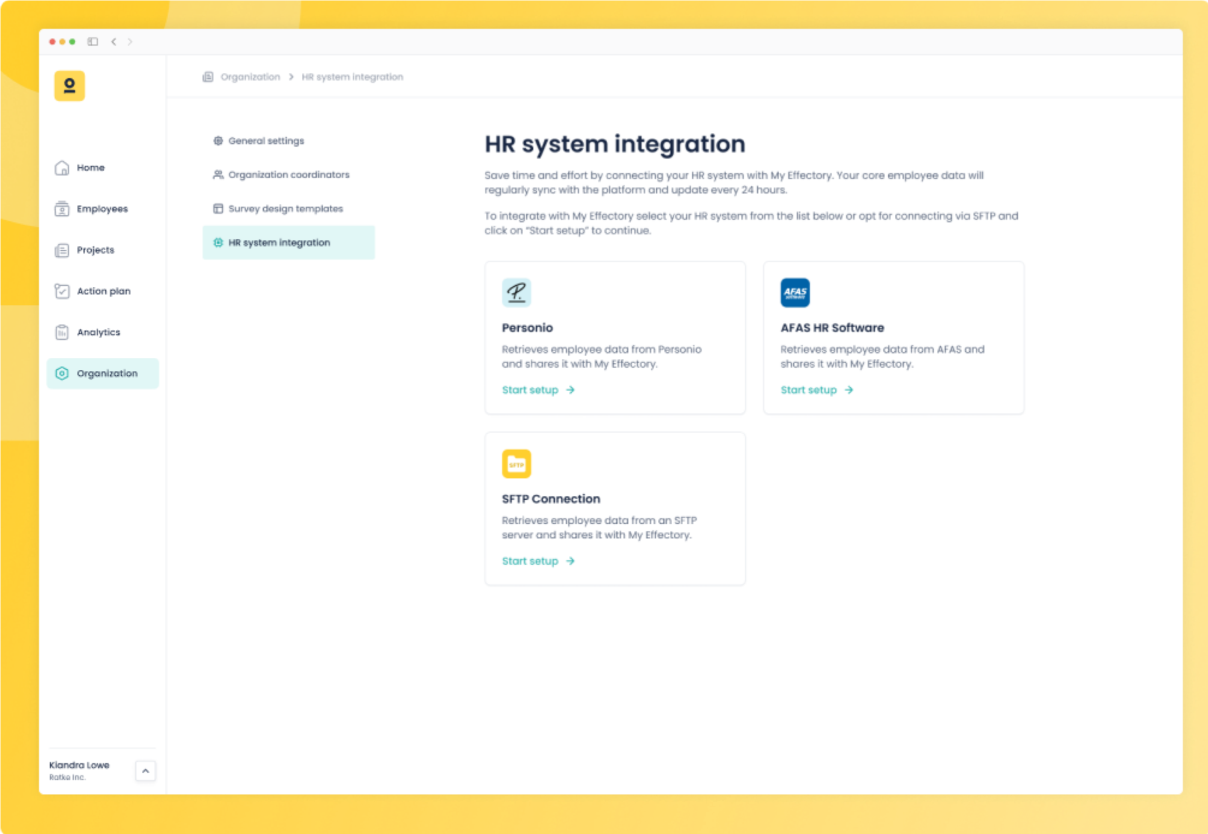
Step 4: Click on "**Generate new credential.**"

Step 5: Copy the generated **Client ID** and **Client Secret** and go to My Effectory.
This information is confidential. Keep in mind that you are responsible for providing it in a secure way.

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

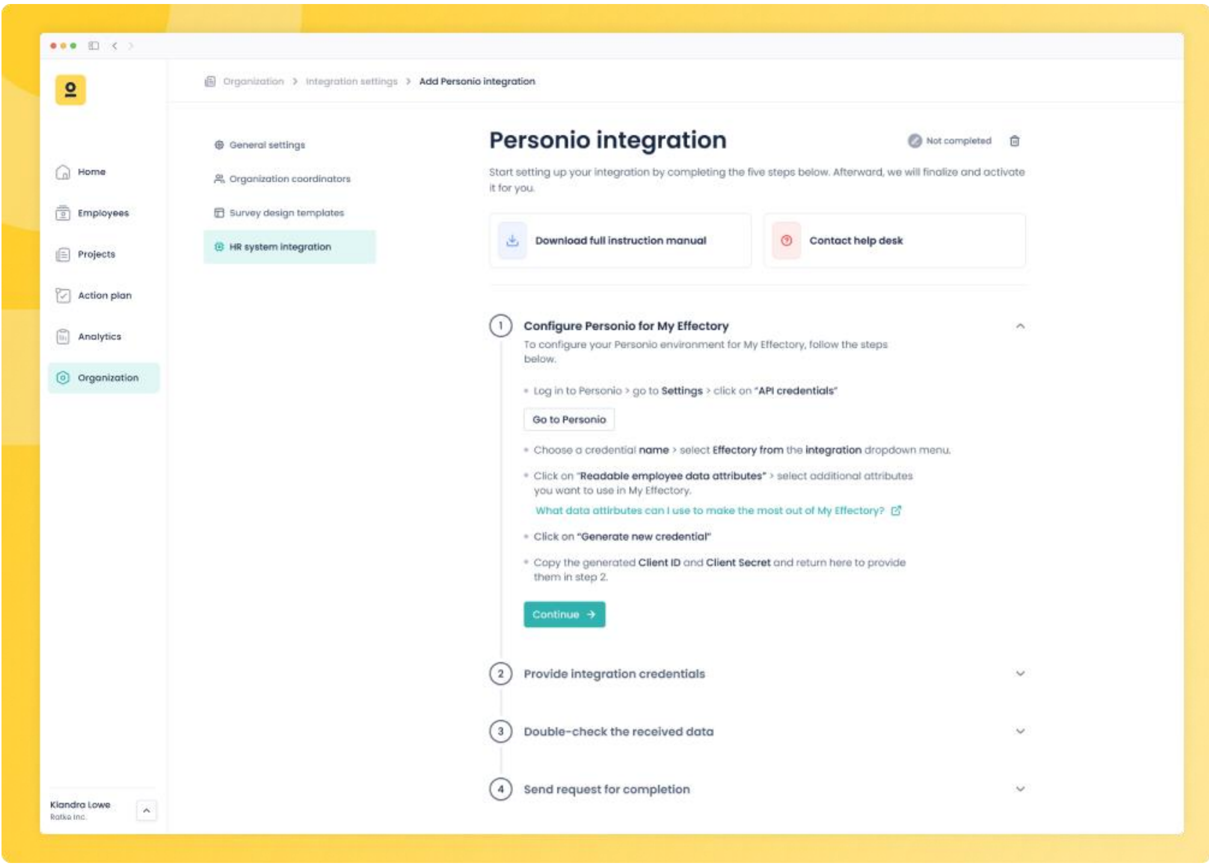
Now you can go ahead and integrate your Personio environment on My Effectory.

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



Step 1: Configure Personio for My Effectory

Click directly "continue" if you have followed the configuration tutorial from [chapter 5.](#) and have your credentials at hand.



Step 2: Connect Effectory with Personio > Fill in your company name > paste the Client ID and Client Secret you have copied from Personio > click on "Connect."

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 for you 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 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 get in touch with us to align your requests.