

Integrating SuccessFactors 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 essential data requirements and prerequisites to set up and run a successful integration of your SuccessFactors employee data with My Effectory. You will be able to learn about the context in which we process your data and follow a detailed setup guide for your integration ([Chapter 4](#)).

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

Integrating My Effectory with your SuccessFactors 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 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

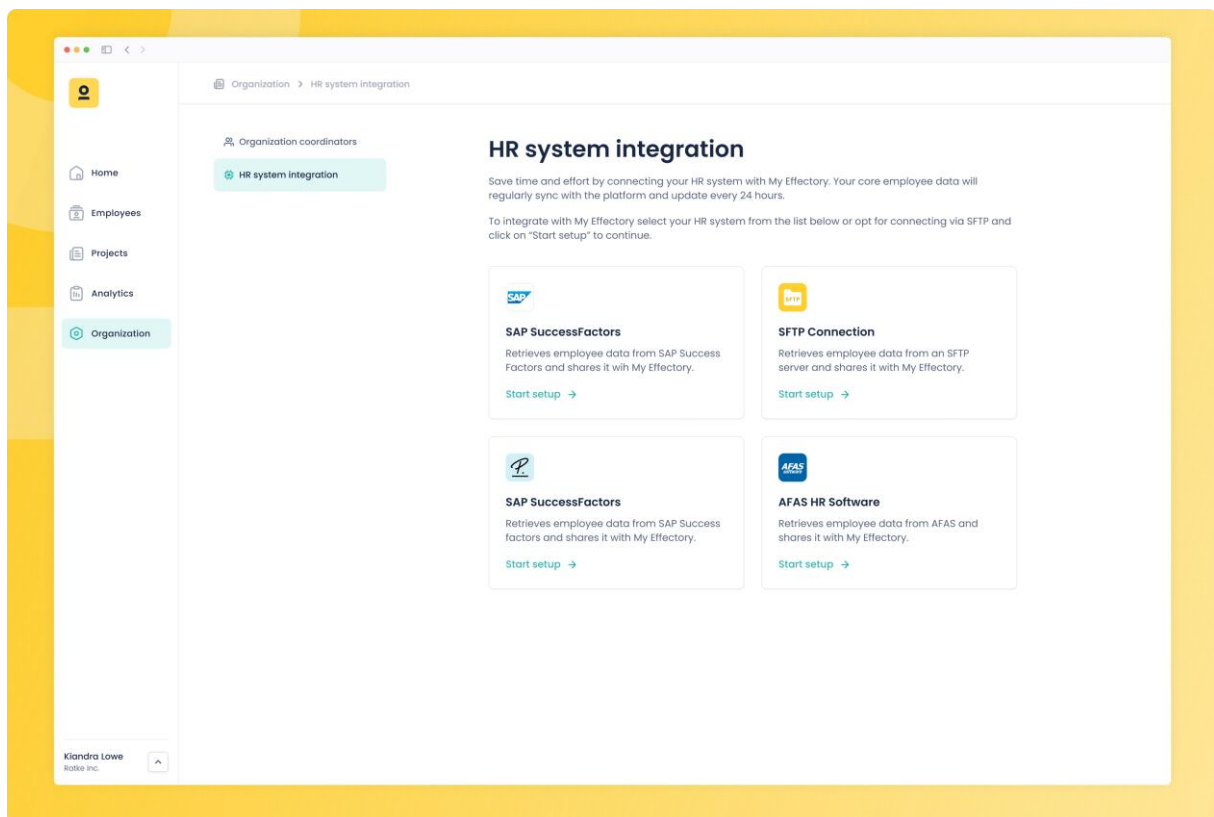
If you are in doubt about including specific data, you can consult with your Customer Success or Project Manager at Effectory.

4. Setup the integration

To start this setup, you will be required to jump between My Effectory and your SAP SuccessFactors environment. Therefore, make sure you have both pages open and easily accessible.

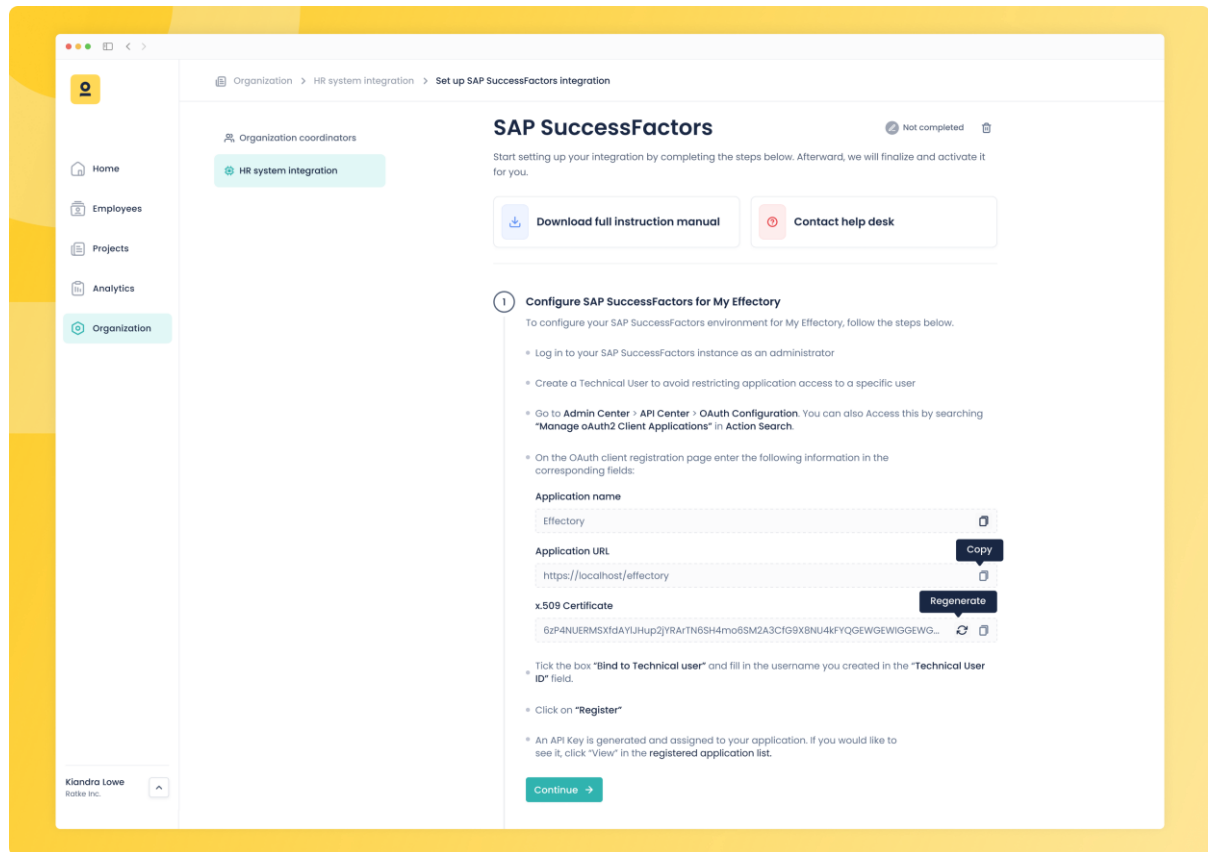
Step 1: Retrieve credentials from My Effectory to configure SAP SuccessFactors

Log in to My Effectory > Select the "Organization" tab on the left > click on "HR System integrations" > Select SAP SuccessFactors from the list of HR Systems.





You will need to fill in the presented Effactory credentials in your SuccessFactors instance. Click on **“Generate an x.509 certificate”** > Copy the **Application URL** > Copy the **Application name** and head over to SuccessFactors.



Step 2: Log in to your SuccessFactors instance as an administrator. Create a **Technical User** to avoid restricting application access to a specific user only.

Step 3: Go to **“Admin Center”** > **“API Center”** > **“OAuth Configuration”**. Alternatively, you can search for **“Manage OAuth2 Client Applications”** in **Action Search**.



Step 4: On the OAuth client registration page, enter the information you retrieved from My Effectory in Step 1 into the corresponding fields and click the box **“Bind to Users”** to fill in the **username** you created in the “Technical user ID field” during Step 2.

Admin Center

Search for actions or people

Back to Admin Tools

Manage OAuth2 Client Applications

Register a new OAuth Client Application(* Required Fields)

Company

*Application Name: Effectory

Description

*Application URL: https://www.effectory.com/

Bind to Users ☒

User IDs: int_effectory

*X.509 Certificate

Generate X.509 Certificate Download Register Cancel

Note: Make sure to **use the x.509 Certificate you have generated on My Effectory**, and **do not** generate it in SuccessFactors!

You successfully configured SAP SuccessFactors for My Effectory!

Step 5: Retrieve the following integration credentials from SuccessFactors to fill them in on My Effectory

- **Username:** Go to the upper right-hand side > click on your profile image > copy your username and keep it.
- **Company ID:** Continue in the same dropdown > click **“Show version information”** > locate Company ID in the modal that pops up.
- **API server** can be found on the server list [here](#).
- **API Key:** Go to **“Admin Center”** > **“Tools”** > Search for **“Manage OAuth2 Client Applications”**. Find the Effectory application you have just created and click **“Edit”**. You will now see the **API Key** listed.



Admin Center ▾

Search for actions or people

Back to Admin Tools

Manage OAuth2 Client Applications

Register Client Application

Items per page 10 Page 1 of 1

Application Name	Application URL	Date Added	Actions
Effectory	https://www.effectory.com/	2022-06-29 11:03:30.173	View Edit Disable Delete

Admin Center ▾

Search for actions or people

Back to Admin Tools

Manage OAuth2 Client Applications

View an existing OAuth Client Application

Company

Application Name Effectory

Description

API Key

Application URL https://www.effectory.com/

Bind to Users ☒

User IDs int_effectory

X.509 Certificate

Back



Step 6: Head back to My Effectory. Fill in the credentials you retrieved in Step 5 and click “Connect”.

The screenshot shows a web application interface for setting up SAP SuccessFactors integration. The left sidebar contains navigation links: Home, Employees, Projects, Analytics, and Organization (highlighted). The main content area is titled "SAP SuccessFactors" and includes a "Not completed" status indicator. Below the title, there are two buttons: "Download full instruction manual" and "Contact help desk". A progress bar shows the first step, "Configure SAP SuccessFactors for My Effectory", is completed, and the second step, "Provide integration credentials", is active. The "Provide integration credentials" step includes instructions to fill in company name and API credentials. Below the instructions are four input fields: "API Server URL" (a dropdown menu showing "https://server.api"), "Company ID" (a text input field), "User name" (a text input field), and "API Key" (a text input field). A link "How to choose the API Server URL" is provided below the first field. At the bottom, there is a "Connect" button with a right arrow.

Organization > HR system integration > Set up SAP SuccessFactors integration

SAP SuccessFactors

Not completed

Start setting up your integration by completing the steps below. Afterward, we will finalize and activate it for you.

[Download full instruction manual](#) [Contact help desk](#)

✓ **Configure SAP SuccessFactors for My Effectory**

2 **Provide integration credentials**

Fill in your company name and the API credentials that you have copied from your SAP SuccessFactors environment, and connect with My Effectory.

API Server URL
Choose a server that is close to your office location

[How to choose the API Server URL](#)

Company ID

User name

API Key

[Where to find the Company ID, Username and API Key](#)

[Connect](#)

Kiandra Lowe
Rattee Inc.



Step 7: After establishing a connection, you can select the data you want to share with My Effectory. If you are unsure about including specific data fields, consult your Customer Success or Project Manager at Effectory.

Organization > HR system integration > Set up SAP SuccessFactors integration

Organization coordinators

HR system integration

3 Select integration data

Fill in the name of your organization and select what data you want to share with My Effectory. We have already selected data fields that are essential to run surveys.

Organization name

Fill in the name of your company or organization. If you have multiple companies or organizations, fill in the parent organization's name or holding.

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Basic employee data

Will be used to send personal invites and manage employee data 2 of 7

Select all

☒ Employee ID
Person-id > person-number

☒ E-mail address
Person-id > work-email

☐ First name
Person-id > Firstname

☐ Prefix
Person_id > last-name-prefix

☐ Last name
Person_id > last-name

☐ gender
Person_id > gender

☐ Date of birth
Person_id > date-of-birth

Organizational data

Will be used to group employees into their teams within the organizational structure 0 of 6

Manager data

Will be used to automate assigning managers to their teams 0 of 3

Employee entry and exit data

Will be used to run Onboarding- and Exit surveys 0 of 2

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Ratke Inc.

Step 8: Double-check the received data. 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 9: 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!



5. 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, 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.