Integrating SuccessFactors with My Effectory

May 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. SETUP THE INTEGRATION

5. FAQ

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

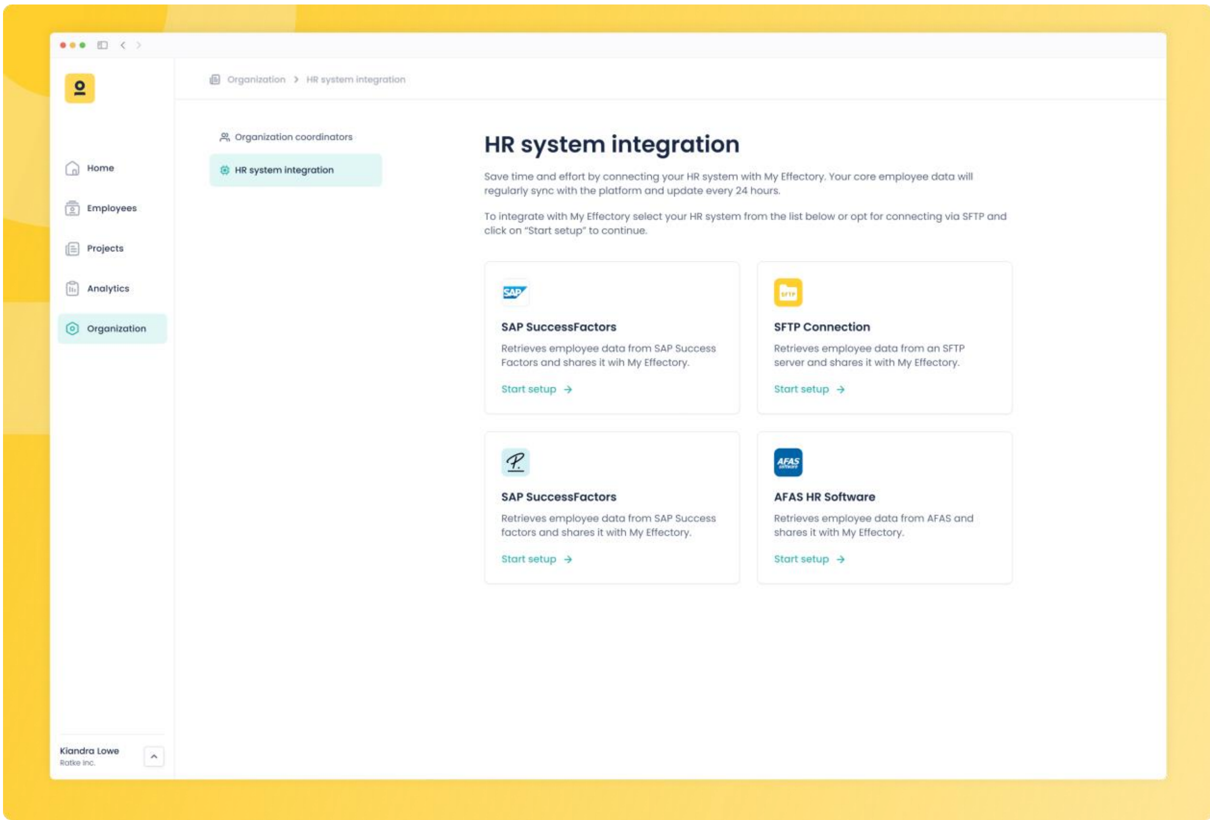
If you are in doubt about including specific data, you can consult with your Customer Success or Project Manager at Effectory.

4. Setup the integration

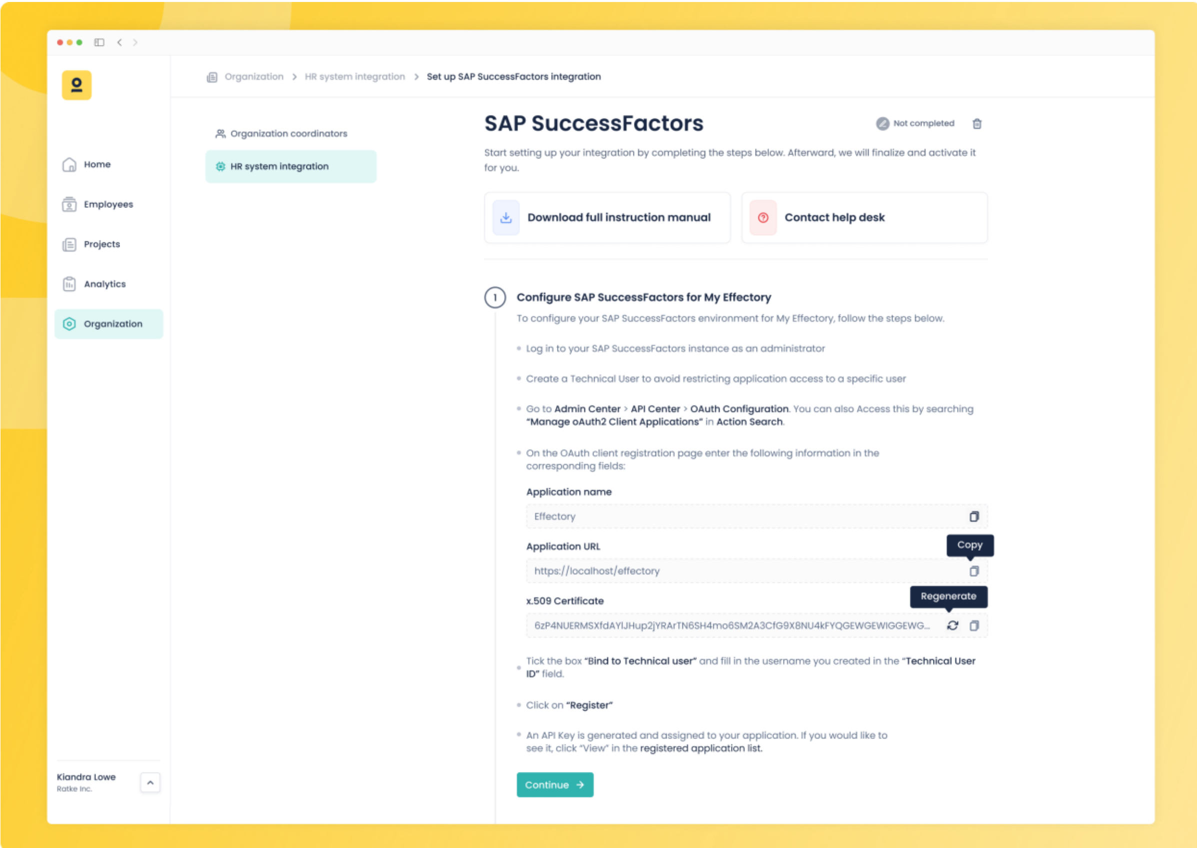
To start this setup, you will be required to jump between My Effectory and your SAP SuccessFactors environment. Therefore, make sure you have both pages open and easily accessible.

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.



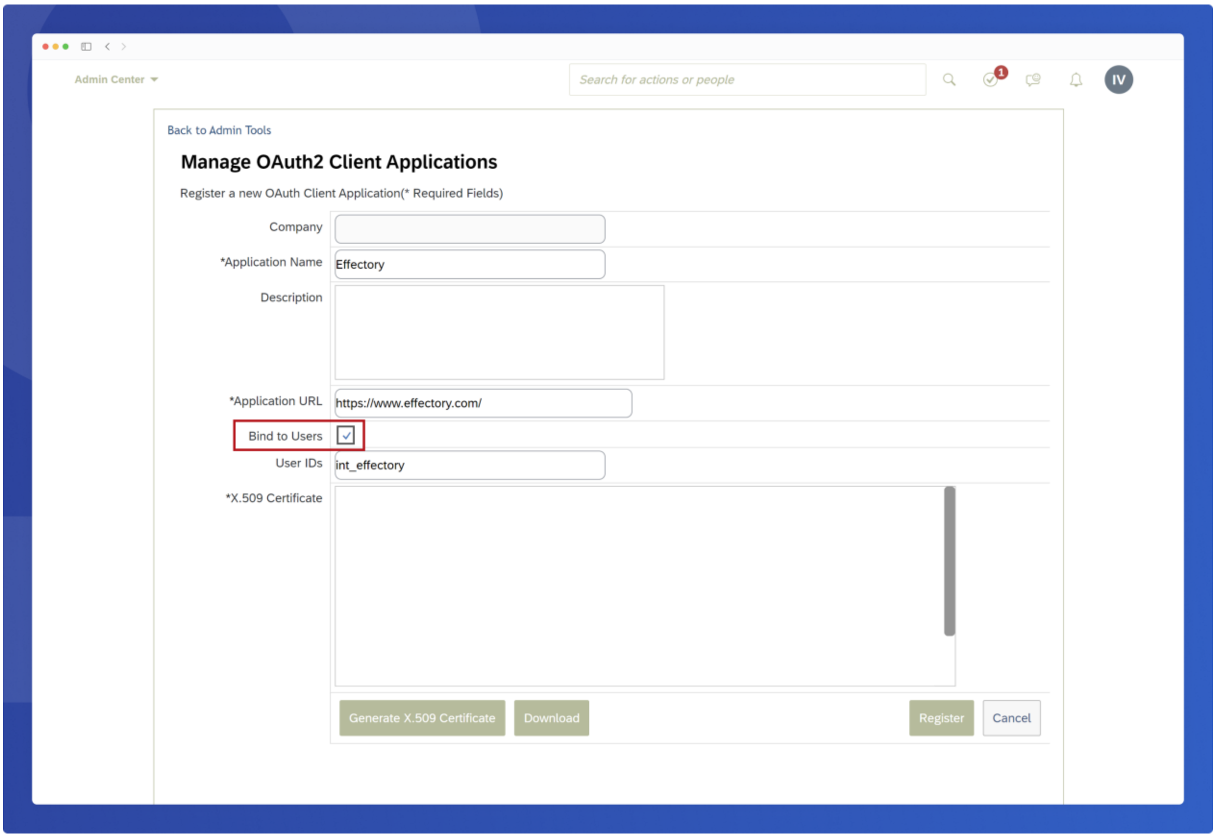
You will need to fill in the presented Effectory credentials in your SuccessFactors instance. Click on **“Generate an x.509 certificate”** > Copy the **Application URL** > Copy the **Application name** and head over to SuccessFactors.



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.

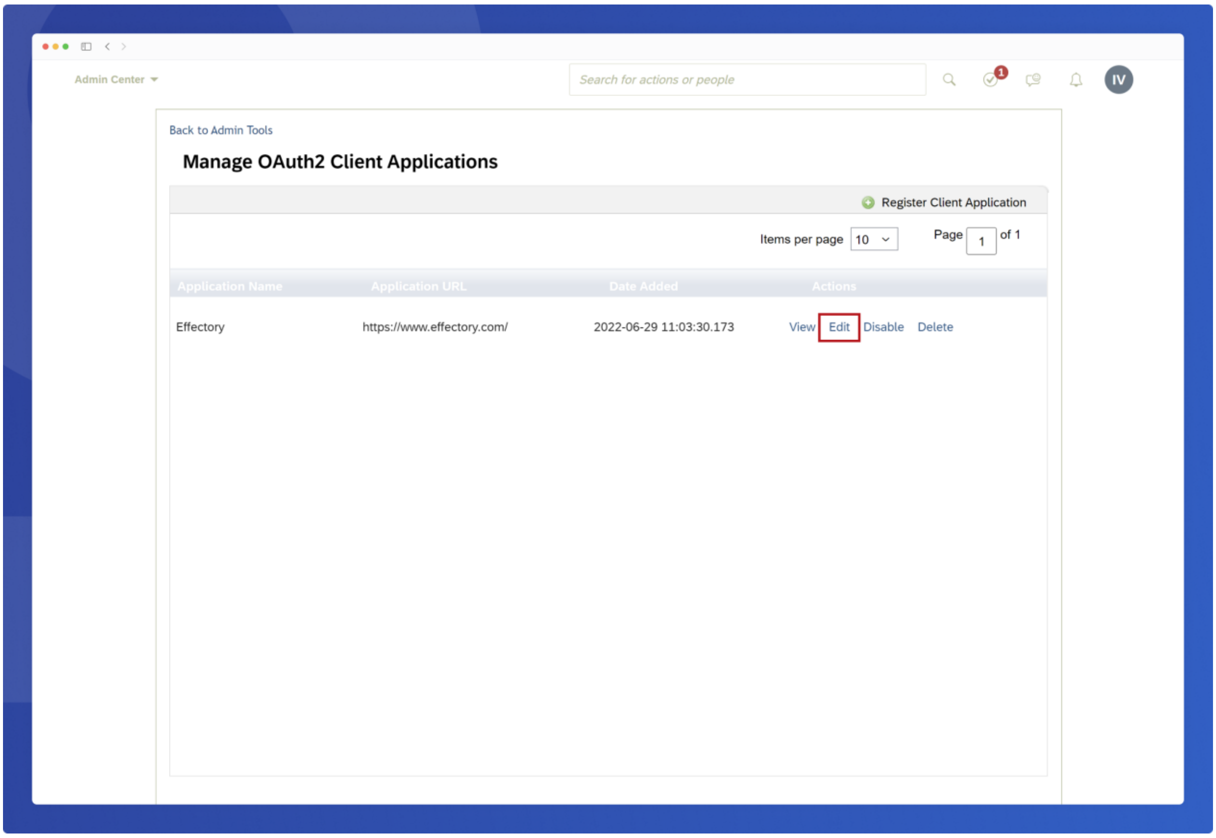


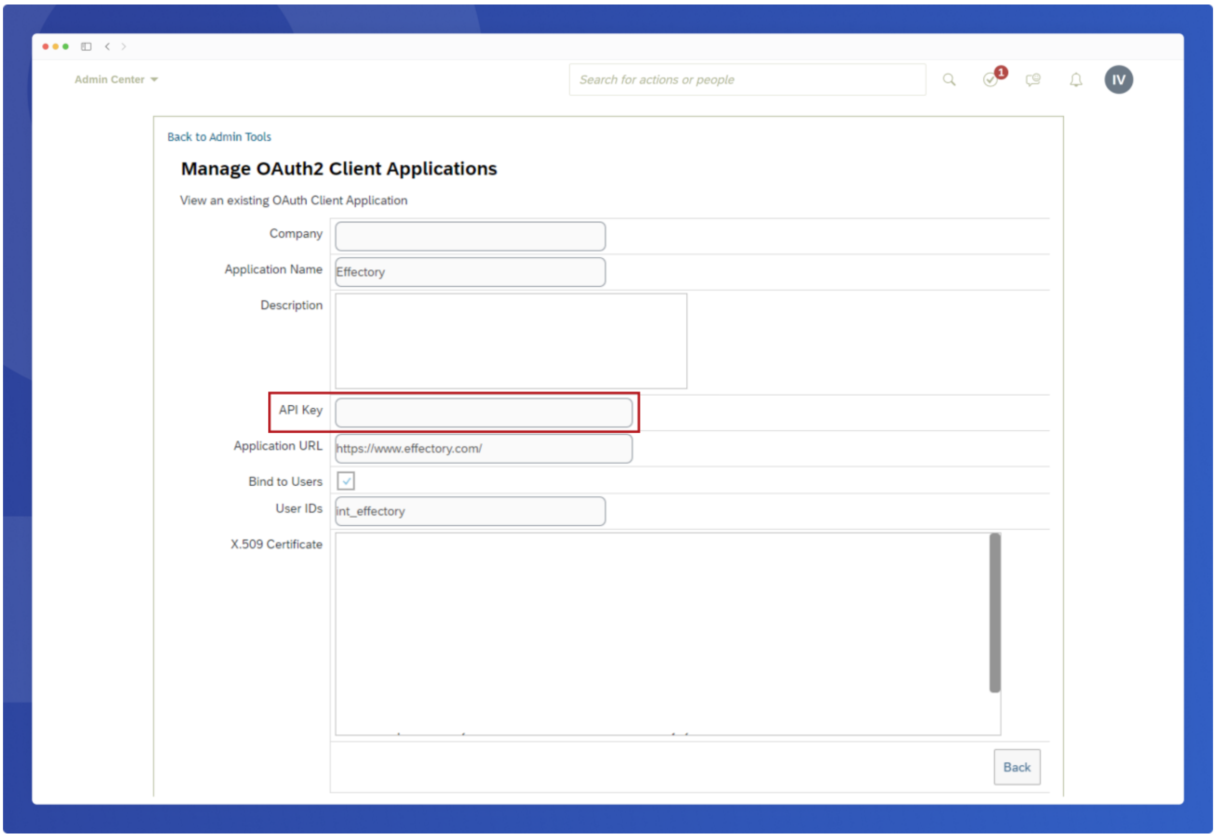
Note: Make sure to **use the x.509 Certificate you have generated on My Effectory,** and **do not** generate it in SuccessFactors!

You successfully configured SAP SuccessFactors for My Effectory!

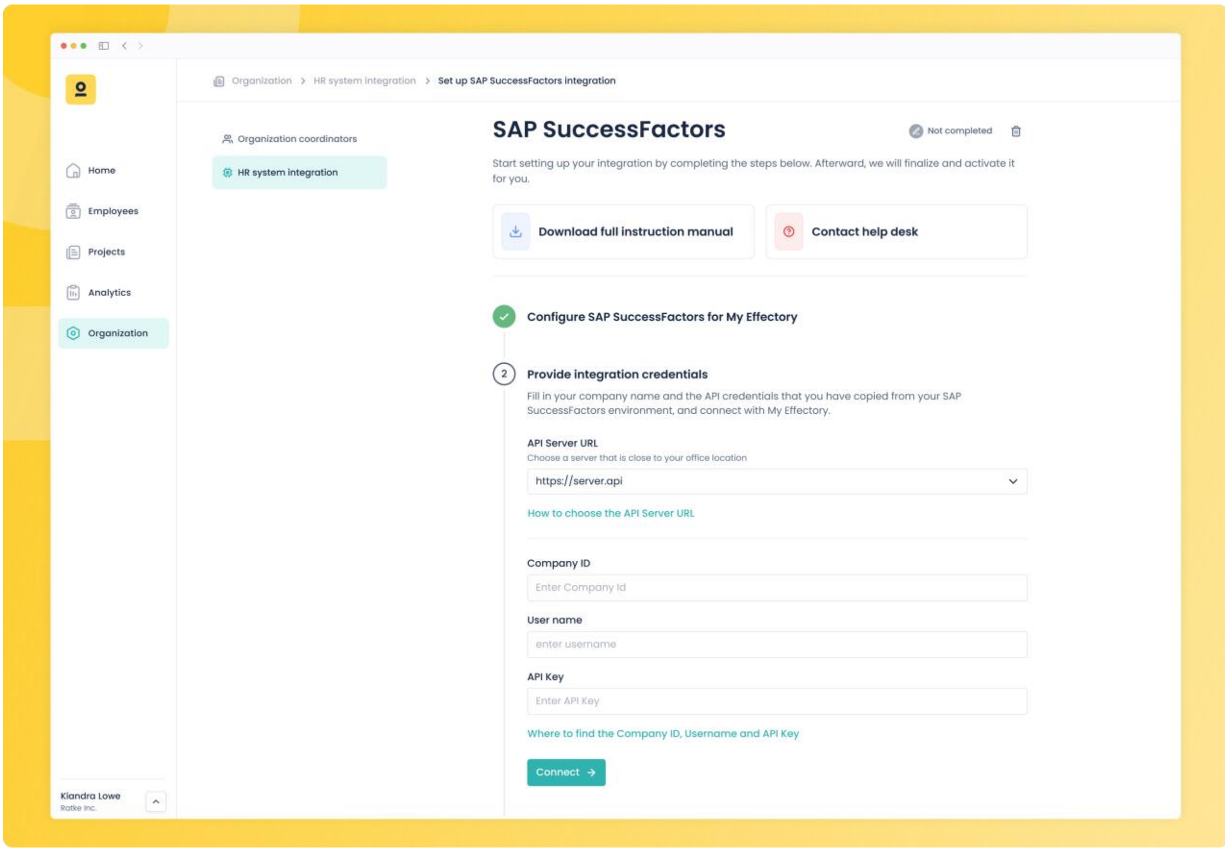
Step 5: Retrieve the following integration credentials from SuccessFactors to fill them in on My Effectory

- **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.

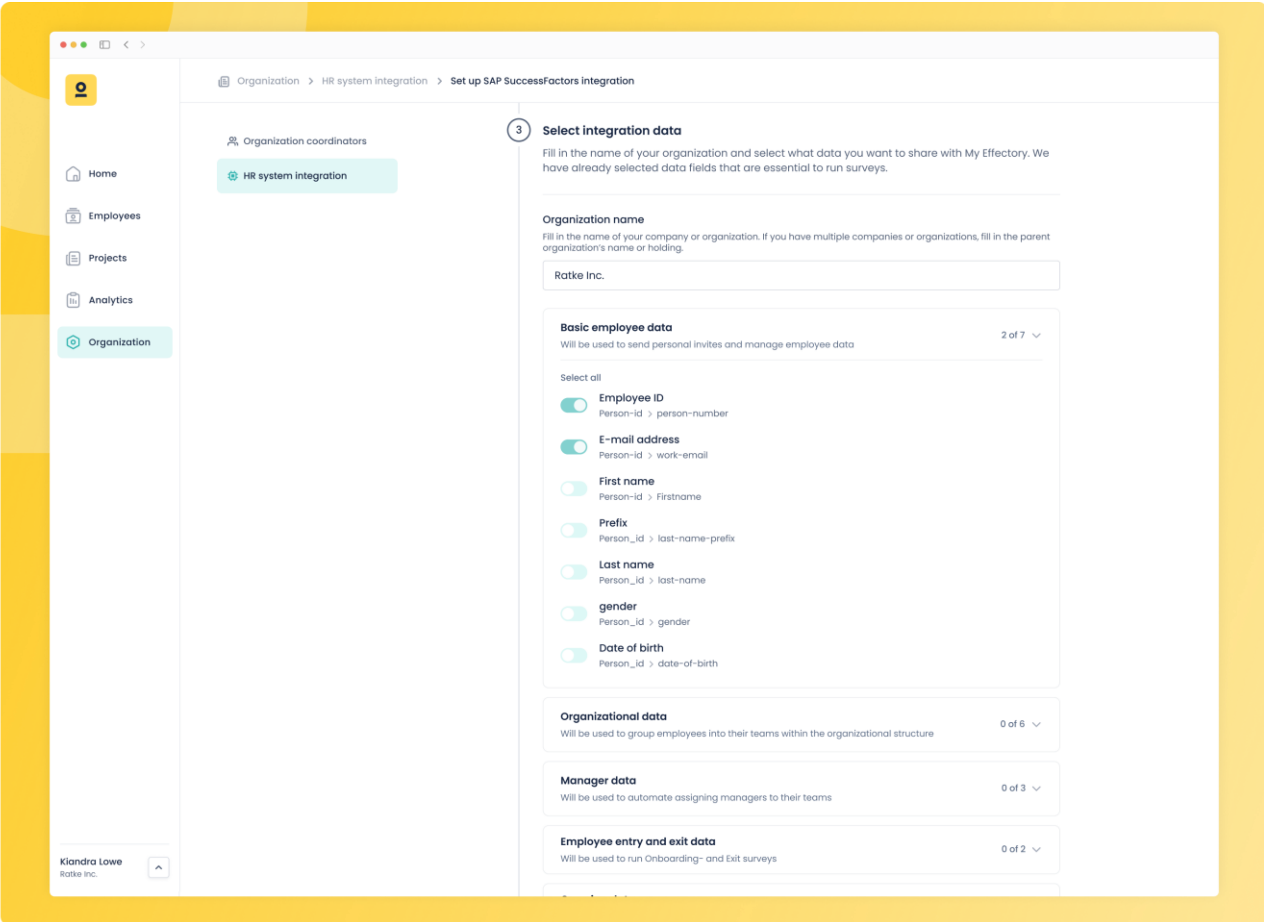

Admin Center
Search for actions or people
IV
Back to Admin Tools
Manage OAuth2 Client Applications
Register Client Application
Items per page 10
Page 1 of 1
Application Name
Application URL
Date Added
Actions
Effectory
https://www.effectory.com/
2022-06-29 11:03:30.173
View
Edit
Disable
Delete


Admin Center
Search for actions or people
IV
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".



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.



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.