

HR System Integration Setup Guide

for GuideSpark Communicate Cloud

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Summary

GuideSpark Communicate Cloud integrates with many different HR systems to ensure an updated and accurate employee list for your employee communications. Because your IT sets up and owns the connection to your HR system, the integration remains under your company's security control.

HR system integration is an alternative to manually uploading CSV files. Integration provides the employee data that Communicate Cloud uses to segment your employee groups, and works with other features like **Automatic Email Delivery**, **Text Messages** and **Results** analytics to facilitate and measure direct communication from your company to your employees. GuideSpark uses [Workato](#) as our integration vendor, allowing us to support hundreds of different HR applications.

In this Guide, we'll describe the steps your IT will take to set up a connection to your HR system. We'll include a worksheet for the information we need for initial account configuration and testing to make sure the connection and the data are correct.

i *HR system Integration syncs your employee list with GuideSpark Communicate Cloud, so your employee groups are always up to date. For Communicate Cloud to send your campaign emails directly to those employees and report on the results by group, your IT will also need to set up email delivery. For info, see the [Automatic Email Delivery Setup Guide](#).*

The rest of this Guide is written for someone who administers an HR system. Typically, this means someone in IT or a related department. Ready? Let's get started...

What your IT department needs to know

You'll provide some info to GuideSpark using the form at the end of this Guide. There will be a few handoff points during the setup process, as well as troubleshooting as needed. Here is the summary:

1. **Fill out the simple form** at the end of this Guide, and return it to your GuideSpark representative (or just email the info). That'll help us kick things off and test the results.
2. **Create custom login credentials for your HR system.** This avoids tying the connection credentials to an individual who might later leave your company. We recommend you flag or name the login account so that its purpose is clear, because resetting the credentials or the login will stop the data integration.

i *Workday users: See the [Workato documentation](#) for more details, including creating an Integration System User (ISU) for your connection login.*

3. **Set up masking or reporting** for your HR system login account—if your system supports this—to prevent sending unneeded personal fields and data (for example, social security numbers or private health data). We recommend masking out only PII or irrelevant fields, rather than being overly restrictive.

Be sure to *include* these fields:

- Employee names, email, employee ID, plus U.S. mobile numbers if your company uses SMS.
- Active/inactive employee status, so we can make updates when employees leave or are re-hired.
- Info that HR can use to personalize communication and analytics for specific employee groups, such as department, job role, office location, union/non-union, manager/individual contributor, and preferred greeting name.

i *Workday users: If you need to restrict the fields that GuideSpark can access, create a report using Workday's Report-as-a-Service (RaaS) and tell us the JSON URL for that report. (Alternatively, we will work with your company to identify and sync only your desired fields).*

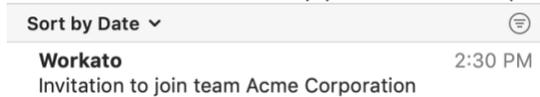
4. **GuideSpark will provision a Workato team** for the IT representative specified on the setup form. Once we provision the team, your IT representative will receive an invitation email from Workato.
5. **Login to Workato, and set up an App Connection** to your HR system, using the login credentials previously created. GuideSpark will *not* have direct access or login capability to your HR system.
6. You should expect some back-and-forth with GuideSpark to identify the right fields in your HR system. We recommend addressing this early so the plan is clear.
7. **GuideSpark will use the App Connection set up by your IT to create the HR Data Source** in your company's GuideSpark Communicate Cloud account. Once GuideSpark tests and activates the connection, the data source will be available for use by your HR for employee communication campaigns.

Next, we'll go over your connection setup steps in detail, for those unfamiliar with Workato.

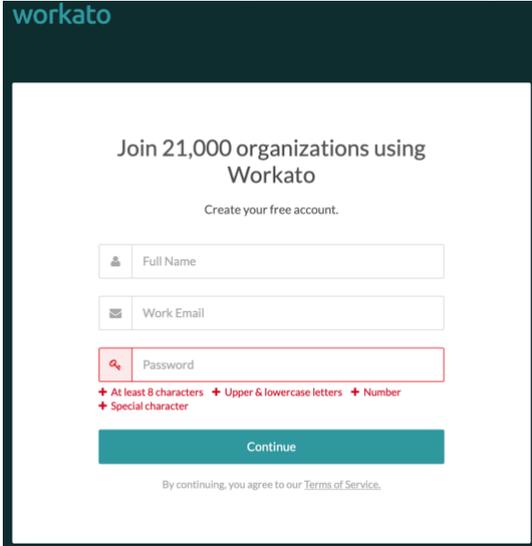
Set up a Workato connection to your HR system

In the previous section, you created an **HR login** credential for your HR system. In this section, you'll use that credential to establish an app connection in Workato.

1. GuideSpark will send you an **invitation email** from Workato, inviting you to join a Workato team that we've set up for you. The team will be used for connecting your HR system to GuideSpark Communicate Cloud. Only you and GuideSpark technical services will have access to your team.

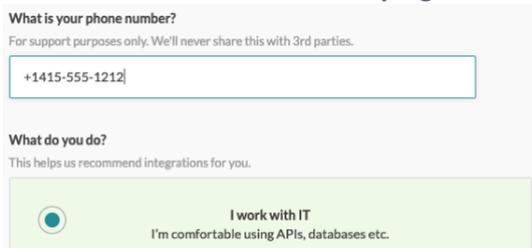


2. If you are not already a Workato user, **register a free account**.

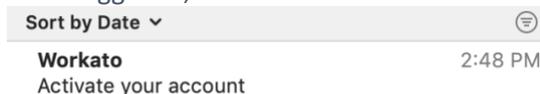


- i** Does your company already have a Workato account? Log in with the email address you normally use, and the team we've created for your integration will be shared with your existing account.

3. Provide a small bit of **recordkeeping info**.

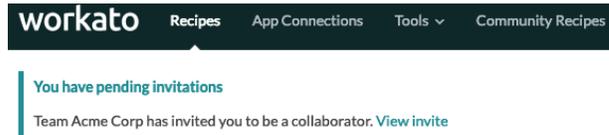


4. Once logged in, look for a second email to **confirm your email address** and **activate your account**.

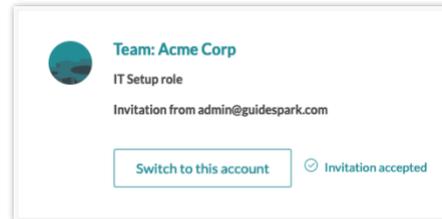
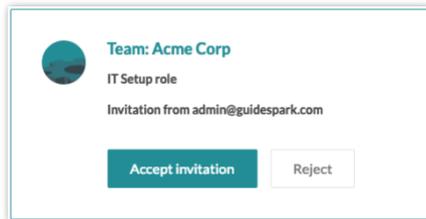


- After confirming your email address, look for “You have pending invitations” at the top-left of the Workato interface.

Important: If you don't see pending invitations at the top-left, wait a few seconds and reload the page. Click the **View Invite** link.

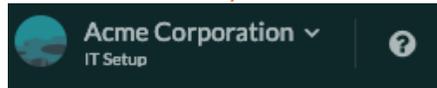


- Click **Accept invitation**, then click **Switch to this account**.



- You should now see your **company's name** as the Team at the top-right.

Important: If you don't see your company's name at the top-right, click the dropdown and switch to that team manually.



Ignore any Oops warning. It's related to Recipes, which GuideSpark will handle.



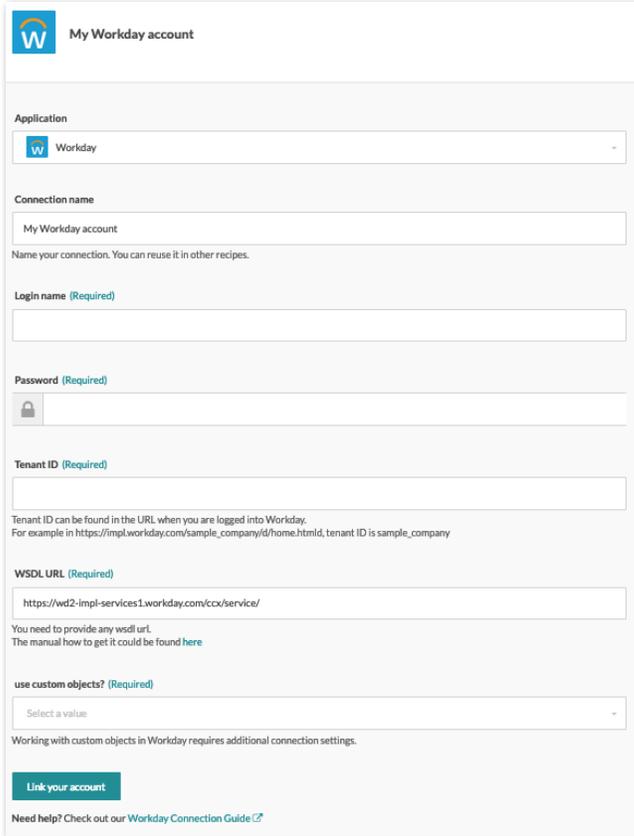
Oops! That page doesn't exist.



- Click **App Connections** in the menu, then click the **Create a new connection** button.



- From the Applications list, choose your HR system and fill out the applicable fields. Authenticate the connection using the HR system login name and password that you created previously.



My Workday account

Application
 Workday

Connection name
 My Workday account
Name your connection. You can reuse it in other recipes.

Login name (Required)

Password (Required)

Tenant ID (Required)
Tenant ID can be found in the URL when you are logged into Workday.
 For example in https://impl.workday.com/sample_company/id/home.html, tenant ID is sample_company

WSDL URL (Required)
 https://wd2-impl-services1.workday.com/ccx/service/
You need to provide any wsdl url.
 The manual how to get it could be found [here](#)

use custom objects? (Required)
 Select a value
Working with custom objects in Workday requires additional connection settings.

[Link your account](#)

Need help? Check out our [Workday Connection Guide](#)

Here we're using Workday as an example.

- When you link your account and see a **Connection success** response, email or call your GuideSpark representative to let us know that the connection has been set up.

Connection established on Mar 15, 2019 2:48:40 PM

[Disconnect](#) ✔ Connection success

And you're done!

Workday integration tips

See the [Workato documentation](#) for full details on integrating Workday into GuideSpark Communicate Cloud.

Login Account: create a dedicated Integration System User (ISU) account for the connection. Do not use the user account of an existing worker in your system.

Business Object vs. Report: Once you set up the App Connection to Workday, GuideSpark can sync your employee data directly using the Business Object, or indirectly via Workday's RaaS (Report as a Service). The most flexible method is through a business object connection. With this approach you'll need to provide a name-by-name list of your desired data fields, since a business object connection to your Workday account exposes many fields with similar-sounding names.

The alternative approach is for you to create an **Advanced custom report**, such that you choose all of the fields you want us to sync. In this approach, you will need to tell us the JSON endpoint URL to that report. Be sure to include required fields such as ACTIVE STATUS (which lists active/inactive status in a simple Boolean), employee ID, name (for use in personalized messages), email, and mobile number if available.

Aside from this required info, we generally do not need fields where every value is unique, since those often contain private info. If you want to segment on fields where every value differs, we recommend creating calculation fields to create larger categories. For example, rather than including salaries, use job levels or salary ranges.

Also include fields that we can use to segment the employee audience for personalization. Common fields for this purpose include department, job role, office name or city, manager vs. individual contributor, and union status.

Caveats: When using a Custom Report, every sync to the report will pull the entire employee list and de-dupe the results. When using the Business Object, only the changed records are retrieved.

Frequently Asked Questions

- ***How is my employee data kept secure?***

GuideSpark takes privacy and security extremely seriously. All employee data transferred via HR system integration is encrypted both in transit and at rest. This data is not shared with third parties, except where necessary to facilitate the synchronization or send an email or text message. When your employee data is synchronized to Communicate Cloud, we use multi-factor authentication to ensure that data is secured to your account.

GuideSpark only uses the data integration and your employee information to facilitate employee communications on your company's behalf, as described in the Master Service Agreement.

- ***How does HR System Integration work with GDPR?***

Our relationship with our customers is that of a "Processor", as defined in the GDPR—this means that we don't use PII for any purpose other than our customers' own utilization of it. In our case, this means having email addresses or mobile numbers in order to contact employees, or employee profile information in order that our customers can view employee segments in their analytics. Workato is a "sub-processor", only caching transactions long enough to facilitate data transfer and error recovery.

The employer-employee relationship is one in which the employer has a *legitimate interest* in storing and using PII for its employees—for example, their corporate email addresses or cell phone numbers, in order to contact them. This legitimate interest, combined with GSCC's Processor status, exempts us from standard GDPR consent requirements for use of such PII for the benefit of our customers.

- ***Will my company be charged by Workato?***

Any applicable charges for the Team account we set up on your company's behalf will be included in your company's agreement with GuideSpark. You will not receive additional charges from Workato for this Team.

- ***How often is my employee list synchronized?***

This depends on the type of connection (direct connections are faster than reports), but changes should be picked up in no more than a day. GuideSpark can provide more specific guidance after your data connection is established.

HR System Integration Setup Worksheet

GuideSpark needs this info to set up HR System Integration. You can fill out and return this form, or send the info in an email to your GuideSpark representative.

IT contact **name** and **email address**:

Integration requires working directly with someone in your IT organization. *A Workato setup email will be sent to this email address.*

HR system and **API version**:

What HR system will be integrated? What API version are you currently using for that system?

Current total number of **active** employees as shown by your HR system:

We use this to verify that we're only counting active employees. *HR systems typically list both active and inactive users. We need to receive both in order to handle deletions and re-additions properly.*

(Optional) JSON URL for Reports:

(Optional) Workday or similar systems optionally filter available data fields using Reports rather than account settings. To import data from a Report, we'll need the JSON URL.

(Optional) Any special notes?

(Optional) If you have any critical notes we need for the integration, please let us know. For example, are their data fields we should specifically include or exclude?

You may want to provide a list of data fields and descriptions separately.
