

Alchemer Workflow Paylocity Initiator

The Paylocity initiator is available for purchase as an add-on. If you are interested in purchasing, please [contact us](#) for additional information.

Overview

The Paylocity initiator combines Alchemer's powerful Workflow and survey capabilities with Paylocity's comprehensive HR and payroll management system.

With this integration, initiate your HR Workflows after changes are made in Paylocity and easily distribute employee surveys, making feedback a seamless part of your HR processes.

The Paylocity initiator is not available to EU customers.

Why Paylocity and Alchemer?

This integration facilitates the distribution of surveys in areas such as employee satisfaction, onboarding, training, and benefits, enhancing data-driven decision-making, boosting employee engagement, and automating time-consuming HR processes through Alchemer's robust Workflow and survey capabilities.

With Paylocity and Alchemer, you and your team can:

- Initiate a Workflow after employee changes are made (this includes adding a new employee) in Paylocity.
- Initiate a Workflow after a new hire event occurs in Paylocity.
- Initiate a Workflow after a time off approval events occurs in Paylocity.
- Initiate a Workflow after a employee termination event occurs in Paylocity.

Setup

The Paylocity Workflow initiator uses Paylocity webhooks. You must complete and return the [Web Services Access Request Form](#) to Paylocity to use the integration. See step #6 for more details.

1. Create a new Workflow.

2. Name your Workflow.

3. In Alchemer Workflow, select the Paylocity button when choosing your Workflow initiator.

4. Choose a Paylocity event as your Workflow initiator.

5. Hit next on the initiator overview screen.

6. If you have not already authenticated your Paylocity account, copy the URL endpoint provided by Alchemer, and paste that URL in the Events section of the [Paylocity Web Services Request Form](#).

7. Email this signed and completed form to webservices@paylocity.com.

8. Paylocity will process the form and, if approved, will provide a Client ID, Client Secret, and Public Key.

9. Click "New Authentication"

10. Use the provided Client ID, Client Secret, and Public Key to configure the Paylocity initiator.



Under the Environment dropdown, if you request Sandbox access from Paylocity you must change the dropdown selection from Production to Sandbox.

11. Click the “Finish” button to complete the Paylocity initiator step. Then click “Save”.

Example Use Case

Scenario

Uncommon Software Solutions, a technology company, recognizes the significance of a good employee onboarding program to support their company's growth. They use Paylocity as their HR and payroll management system and leverage Alchemer Survey to collect internal and external feedback.

The HR Team is committed to not only providing a seamless and consistent onboarding experience for new hires, but also to continuously improve their onboarding process with employee feedback. However, with limited bandwidth, the HR team is struggling to build such an onboarding program.

Problem

Uncommon Software Solutions faces several challenges in their current employee onboarding process as the company continues to grow:

- **Inconsistent Onboarding Experience:** Their onboarding process lacks consistency, leading to variations in new hire experience.
- **Time Constraints:** The current onboarding process is manual and time-consuming, and often changes depending on how busy the HR team is.
- **Lack of Employee Feedback:** Employee feedback collected during onboarding is inconsistent and at times not collected at all. The process is manual and requires a member of the HR team to manually send surveys to new employees.

Solution

To solve these challenges, Uncommon Software Solutions harnesses the capabilities of Alchemer Workflow's Paylocity initiator to kick off an Employee Onboarding Workflow whenever a New Hire event occurs in Paylocity.

This solution:

Automates Onboarding Kick-off

The Paylocity initiator with Alchemer Workflow automates the initiation of the onboarding process, by triggering the Workflow whenever a new employee is added to Paylocity. This eliminates the need for manual initiation, resulting in a more efficient onboarding process, while reducing delays and increasing the likelihood of the new hire getting off to a good start.

Addresses Onboarding Inconsistencies

Using Alchemer Workflow to implement a Employee Onboarding Workflow ensures a uniform onboarding process for every new hire. Alchemer Workflow also makes it easy to involve different departments across an organization. For example, Uncommon Software Solutions can configure the Workflow to send equipment requests to the Technology Team or training requests to the Onboarding Team. This ensures every new employee receives the necessary supplies and information to be successful in their new role.

Improves and Automates Feedback Collection

Within the onboarding Workflow, the HR Team can also create customized feedback collection points and automate the process for sending feedback surveys. This could take the form of a 30/60/90 program where new hires are sent a feedback survey every 30 days, for the first 90 days after being hired.

An automated 30/60/90 program gives every new hire a voice and an opportunity to give feedback, while providing the HR team with the necessary information to make data-backed program improvements.

Merge Codes

When the webhook fires, Paylocity will pass the following fields to Alchemer Workflow. After configuring this initiator, you can use these fields in merge codes, logic, and other Workflow features.

For more information on how to use these merge codes in your Workflow, [check out this article](#).

FAQs

- ▶ What permissions do I need within Alchemer to set-up and use the Paylocity initiator?
- ▶ Can multiple Workflows initiate off the same Paylocity initiator?
- ▶ This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

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