

# 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.

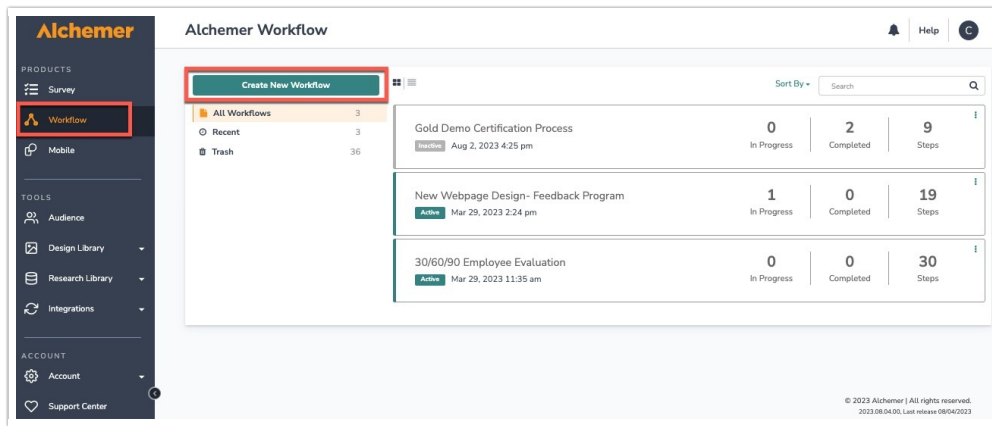
With Paylocity and Alchemer, you and your team can:

- 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.

Create New Workflow

\* What would you like to name this Workflow?

New Employee Onboarding Workflow

Cancel Start Building

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

Select Initiator

Survey Listener  
When a given survey is completed

Share Link  
When a user clicks on a custom workflow link

Salesforce


**Paylocity**

Zendesk

Asana

Need Help? Next

4. Choose a Paylocity event as your Workflow initiator.

 **Configure Initiator**

**Employee Change**  
 Start the Alchemer Workflow when an employee change event occurs in Paylocity


**New Hire**  
 Start the Alchemer Workflow when a new hire event occurs in Paylocity

**Time Off Approval**  
 Start the Alchemer Workflow when a time off approval event occurs in Paylocity

**Terminated**  
 Start the Alchemer Workflow when an employee termination event occurs in Paylocity


< Previous: Select Initiator
Cancel
Next

5. Hit next on the initiator overview screen.

 **Configure Initiator**


## Paylocity / Employee Change

Initiate a workflow run when a change occurs on an employee record in Paylocity  
 Pull related fields to use in logic conditions, email invites, and merge codes

 Follow our [step-by-step guide](#) to learn how to setup your Paylocity initiator.


Cancel
Next


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](#).

 **Configure Initiator**

## Paylocity / Employee Change

**Setup Link**  
 Provide the following URL to Paylocity to receive your connection credentials. [Learn more](#).

<https://api.alchemer.com/v1/workflows/35486294423877/mappings>




## Webhook Push Notifications

The developer/vendor contact can help provide these details.

### Events

Select desired **webhook push notification** events and enter your configured URL (HTTPS).

If the same URL can be used for multiple events, copy the URL into every applicable field. Every checked box requires a URL. Checked boxes with empty URL fields will be ignored.

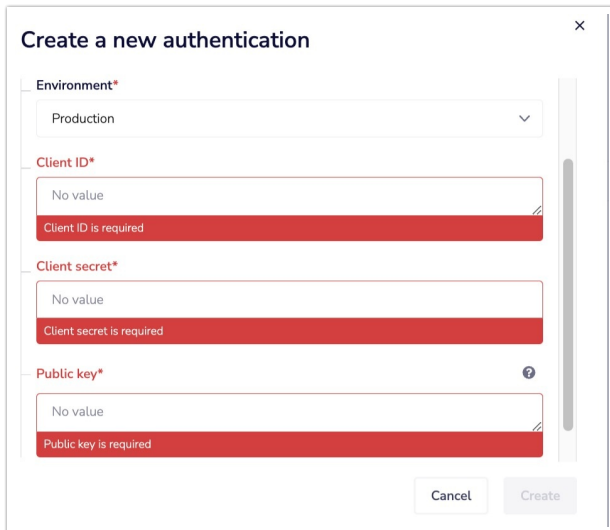
<input type="checkbox"/>	<a href="#">New Hire</a>	URL <input style="width: 400px;" type="text"/>
<input type="checkbox"/>	<a href="#">Employee Change</a>	URL <input style="width: 400px;" type="text"/>
<input type="checkbox"/>	<a href="#">Termination</a>	URL <input style="width: 400px;" type="text"/>
<input type="checkbox"/>	<a href="#">Time Off Approval</a>	URL <input style="width: 400px;" type="text"/>
<input type="checkbox"/>	<a href="#">Company Processed Payroll</a>	URL <input style="width: 400px;" type="text"/>

7. Email this signed and completed form to [webservices@paylocity.com](mailto: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"

### Select Connection

New New authentication

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



A dialog box titled "Create a new authentication" with a close button (X) in the top right corner. It contains three input fields, each with a red error message below it. The first field is "Environment\*" with a dropdown menu showing "Production". The second field is "Client ID\*" with the error "Client ID is required". The third field is "Client secret\*" with the error "Client secret is required". Below these is a "Public key\*" field with the error "Public key is required" and a help icon (i). At the bottom are "Cancel" and "Create" buttons.

Create a new authentication

Environment\*  
Production

Client ID\*  
No value  
Client ID is required

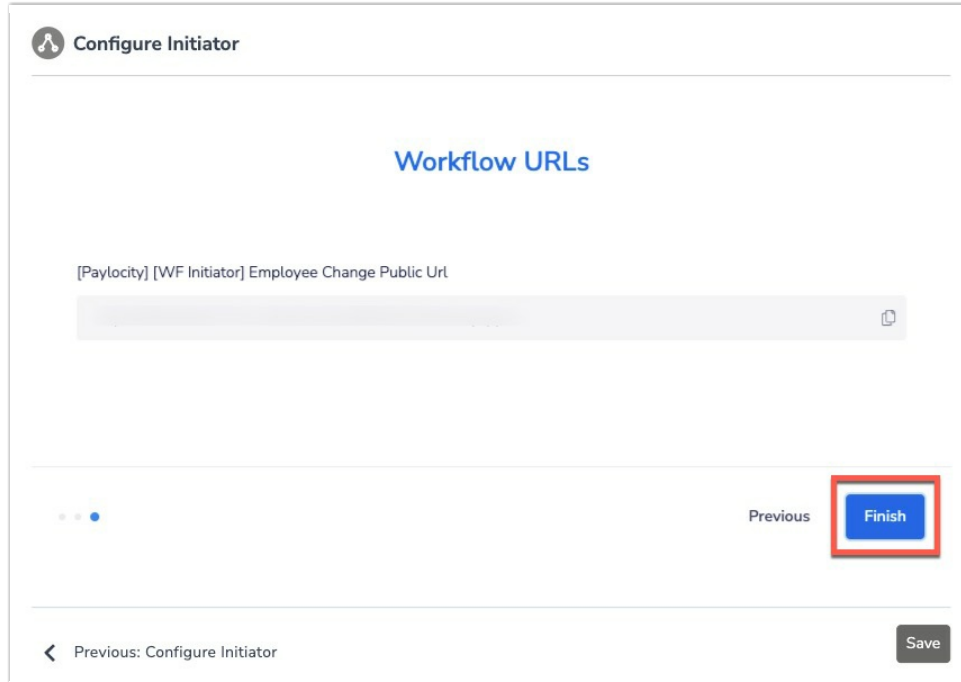
Client secret\*  
No value  
Client secret is required

Public key\*  
No value  
Public key is required

Cancel Create

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".



A screen titled "Configure Initiator" with a sub-header "Workflow URLs". It displays a text field containing "[Paylocity] [WF Initiator] Employee Change Public Url" with a copy icon to its right. Below the text field is a progress indicator with three dots, the second of which is blue. To the right of the progress indicator is a "Previous" link and a "Finish" button, which is highlighted with a red rectangle. At the bottom left is a "Previous: Configure Initiator" link, and at the bottom right is a "Save" button.

Configure Initiator

Workflow URLs

[Paylocity] [WF Initiator] Employee Change Public Url

Previous Finish

Previous: Configure Initiator Save

**Configure Initiator**

### Workflow URLs

[Paylocity] [WF Initiator] Employee Change Public Url

Integration successfully setup!  
Close this window now

Previous Finish

Previous: Configure Initiator 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](#).

- ⊕ Fields for Paylocity initiator - Employee Change
- ⊕ Fields for Paylocity initiator - New Hire
- ⊕ Fields for Paylocity initiator - Time Off Approval
- ⊕ Fields for Paylocity initiator - Terminated

## 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!

Related Articles