



Workable Integration

The Workable integration enables a successful candidate's record to be automatically created within the main Cezanne system and a New Starter Process task to be generated.

This article explains how the Workable integration works and how to set it up.

Overview

The Workable integration creates the following:

1. A Person record in Cezanne with basic Personal Information and Contact Details. For more information, see: **Fields Sent to Cezanne**.
2. The Person's Employment Details record, based on the Company Code specified in the Integration configuration.
3. The Person's Deployment record, based on the Department specified on the Workable screens and the Org Unit Name.
4. A New starter process task for a specified HR Professional (New Hire Administrator) for each successful candidate.

Configuration

Important:

- This integration only works if an 'Enter a New Starter' or 'Enter a New Starter (Without Absences)' Process is active. For more information about how to set up these processes, see: **New Starter Process** (<https://support.cezannehr.com/en/support/solutions/articles/15000007796-new-starter-process>).
- The latest 'Enter a New Starter (with Absences)' Process created will be used first by the integration. If one cannot be found the latest 'Enter a New Starter (without Absences)' Process created will be used instead.

Navigate to: **System Setup >> Integrations >> Workable**.

Workable Details

The Details screen configures the subscription to Workable and some of the details for a successful candidate's New Starter Process.

Workable Integrations Details Tab.mp4

https://media.screensteps.com/attachment_assets/assets/002/805/171/original/Workable_Integrations_Details_Tab.mp4

Hover over the image below to play the video.

No records available



Add New

Save

1. **Subdomain** - Enter the Subdomain which can be found on Workable (**Account Details >> Company Profile**).
2. **Partner Token** - Enter the Partner Token. This can be found on Workable (**Account Details >> Integrations >> CezanneHR**).
3. **New Hire Administrator** - Search for a HR Professional User to be the person responsible for the New Starter Process. They will be sent the tasks to complete a successful candidate's New Starter Process.
4. **New Hire Default Company** - Search for the Company Code the successful candidate will be hired into.
5. Click **Save**.

Note:

- The New Hire Administrator field will have to be manually updated if the user becomes a leaver or their Username changes.
- Only 1 Default Company can be entered, however a successful candidate's Company can be changed in the New Starter Process by the New Hire Administrator.

Workable Log

The Log tab displays any information or errors that have occurred after hiring a successful candidate in Workable.

Workable				
Details		Log		
	Date (UTC)	Type	Message	Message ID
	18/09/2019 11:44:22	Information	The Person Carl Carlson has been automatically set to report to Laura Bake...	103015
	18/09/2019 11:07:58	Information	The Person Moe Sizlak has been automatically set to report to Laura Baker,...	103015
	18/09/2019 11:03:39		We can't create past Supervisor details for at least one person based on the...	103132
	18/09/2019 11:03:39	Error	An unexpected error occurred while retrieving data ('COMMUNICATIONS' c...	5801
	18/09/2019 11:03:39	Error	An unexpected error occurred while retrieving data ('ADDRESSTYPECODES' ...	5801

(https://media.screensteps.com/image_assets/assets/002/805/172/original/c6fe396f-eed9-4427-aaba-fc873da5daaa.png)

1. An **Information** message shows which Person the integration has successfully started a New Hire Process for.
2. An **Error** message shows that a person has not been successfully created in the system and displays why e.g. because the Job's Department in Workable does not match an Org Unit in Cezanne etc. For more information about errors, see: **Troubleshooting**.

Fields Sent to Cezanne

The following fields are sent to Cezanne using the integration:

Personal Information

Field	Comments
First Name	Sent from First Name field in Workable.
Surname	Sent from Last Name field in Workable.
Known As	This will default to the name entered in the First Name field.
Full Name	This will default to the First & Last Name entered.
Legal Name	This will default to the First & Last Name entered.
Person Code	<ul style="list-style-type: none"> • If using Automatic Person Code Settings, this will be automatically generated as the next available code. • If not using Automatic Person Code Settings, the field will contain the Workable number prefixed by 'REC'.
Gender	This field is not filled out in Workable, but is a mandatory field in Cezanne so defaults to 'Not Known'.
Date of Birth	This field is not filled out in Workable, but is a mandatory field in Cezanne so defaults to the candidate's initial Hire Date.
Personal Mobile Number	Sent from Primary Phone Number entered in Workable.
External E-mail	Sent from Primary E-mail Address entered in Workable.

Address	Sent from Address entered in Workable. (Note: The address in Workable must include at least a Street Name or Postcode to be configured into Cezanne's address format and will be added with default Address code 'D'.)
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Employment

Field	Comments
Hire Date	This field defaults to the date the candidate was initially 'Moved to Hired' in Workable.
Termination Date	This field defaults to 'Open Ended'.
Employment ID	This field will default to the same as Person Code.
Company Name	This field is determined by the Company Code entered in the Cezanne - Workable Details screen, see: <u>Configuration</u>

Deployment

Field	Comments
Org Unit Name	Sent from the Department field in Workable, which must match an active Org Unit in Cezanne.
Position Title	Sent from the Job Title field in Workable. The field will be left blank if there is no active Position in Cezanne that matches.

Note:

- Any changes made to a field in a successful candidate's profile will not be sent to Cezanne after a New Starter process in Cezanne has started.

Troubleshooting

This section contains a possible solution to problems that you may encounter when using the Workable integration:

- **New Starter Process Task has not been created.**
- **Employment details record has not been created.**
- **Deployment record has not been created.**
- **Deployment record created but the Position Title is blank.**
- **Personal Information is filled in with no Address.**

Note:

- Ensure you have checked the log to find details on any errors that may have occurred.

New Starter Process Task has not been created

The New Starter Process will not be created if any information necessary to create an Employment or Deployment record cannot be found e.g. Company Name or Org Unit.

Solution

Check the Integration Log which will display any errors, depending on the message ensure:

- Company Name in Workable matches and existing and active Company in Cezanne.
- Department in Workable matched an existing and active Org Unit in Cezanne.

Once the problem is solved, you will need to kick off the New Starter Process:

- Navigate to Workable.
- Move the candidate to a different stage.
- Then move the candidate back to Hired again to kick off the process again.

Employment Details has not been created

Employment Details will not be created if:

1. The Company is now inactive or has been deleted.

Solution

- Add the Employee details in the process.
- To prevent this happening for any other successful candidates, change the Default Company in the integrations screen to one that is active.

2. The Company Code has been changed.

Solution

- Add the Employee details in the process.
- Manually update the Company Code to the current code in the Integrations screen.

Deployment record has not been created

A Deployment record will not be automatically created in the process if no Department has been entered in Workable.

Solution

- The New Hire Administrator will have to add the Deployment details in the process.
- Enter a Department in Workable that matches an active Org Unit in Cezanne.

Deployment record created but the Position Title is blank

No Position Title will be entered on the Deployment Details tab in the New Starter Process if:

1. The Job Title in Workable does not match an active Position Title in Cezanne.

Solution

- The New Hire Administrator will have to add an active Position to the candidate's Deployment record in the process.
- To prevent this happening again for any other successful candidates, ensure the Job Title in Workable matches an active Position in Cezanne.

2. There are more than one active Position Titles in Cezanne that match the Job Title in Workable.

Solution

- The New Hire Administrator will have to add an active Position to the candidate's Deployment record in the process.
- To prevent this happening again for any other successful candidates, consider deleting one of the active Positions in Cezanne that is not needed.

Personal Information is filled in with no Address

Address will not be filled in if there is no Address in Workable or the address filled in was not recognised by Cezanne.

Solution

- Change the address in the Personal Information tab in the process.
- Ensure there is a recognisable street address, house name and/or postcode.

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