Pre-Integration Checklist

Complete steps 1-9 below before you begin the BambooHR integration setup. Please contact TriNet if you have questions.

☐ **1. I am a US-based client:** Please confirm that you are a US-based client as the BambooHR integration is not currently available for Canadian- or PuertoRican-based clients.

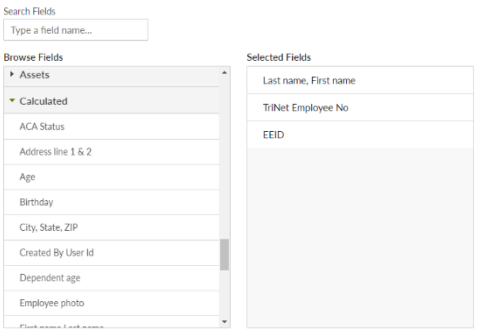
☐ **2. BAMBOOHR EMPLOYEE ID:** Add the internal BambooHR Employee ID (EEID field) in the Alternate ID field in TriNet. **This step is critical for the integration to work properly.**

Important: This is not an ID stored in the BambooHR "Employee #" field.

The easiest way to retrieve the internal BambooHR Employee ID is to create a report from BambooHR:

Reports > New Report: Enter Report Name

Select following columns:



PERSONAL

- Last Name
- First Name
- TriNet Employee No

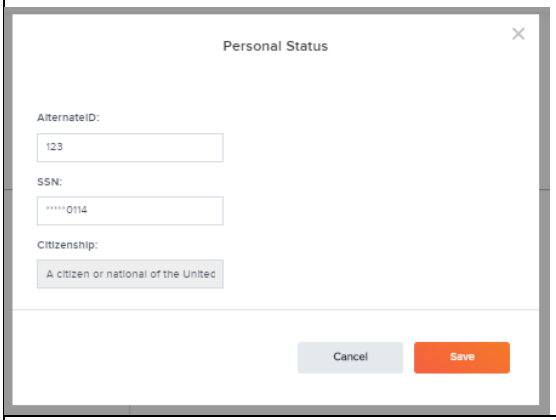
CALCULATED

- EEID

Filter out terminated and non-US employees.

Note: This step is only required during the initial setup. All new employees hired that use the integration will have the Alternate ID field already populated. Please contact BambooHR support if you need more information on how to retrieve employee's EEID info.

The Value from the EEID field should be populated in TriNet Alternate ID for all existing employees.



Existing TriNet clients with 1-19 employees: Add the Alternate ID in TriNet manually for all active employees under Admin/Manager View > Employees > Manage Employees > Select Employee > Profile > Personal Status > Edit.

Existing TriNet clients with 20+ employees: Contact Connect 360 for assistance.

Existing BambooHR client newly onboarding to TriNet: Add the Alternate ID to the upload spreadsheet during the initial employee import process.

☐ Once complete, proceed to checklist item 3.

☐ **3. TRINET EMPLOYEE ID:** Determine in which field you would like to store the employee's TriNet Employee ID in BambooHR > People > Select Employee> Personal.

☐ **Option 3A: BambooHR "Employee #" field**

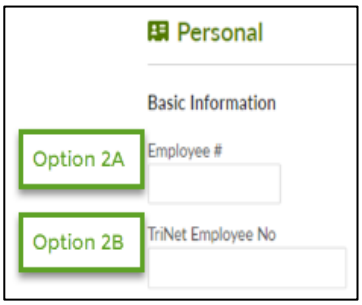
- If you plan to use the Employee # field for the TriNet Employee ID, select this option and proceed to checklist item 3.
- If you already store a unique ID in the Employee # field, use Option 2B.

☐ **Option 3B: BambooHR custom field**

- If you already store a unique ID in the Employee # field, select this option and complete each of the following steps:

  ☐ Ask BambooHR to create a custom field and description, for example: “TriNet Employee No”.

  ☐ Add the TriNet Employee ID to the BambooHR custom field for all active employees.



☐ Please make a note of the custom field name as you will be required to provide it during the integration setup. TriNet requires you to provide an alias of the field. It is typically very similar to the label you see next to the field in the Bamboo HR system. It will always have the following structure:

1. Word “custom”
2. Text seen on the screen with spaces in between words removed.

For example, if your custom field is visible in BambooHR as “TriNet Employee ID”, the alias you will need to enter during the configuration is “customTriNetEmployeeID”.

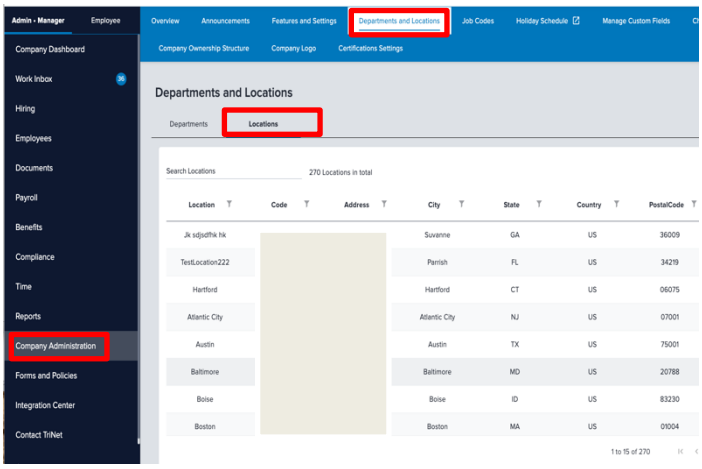
In the screenshot above the field is called TriNet Employee No, so the alias is “customTriNetEmployeeNo”.

Please reach out to BambooHR support if you are not sure what the proper alias is for the field.

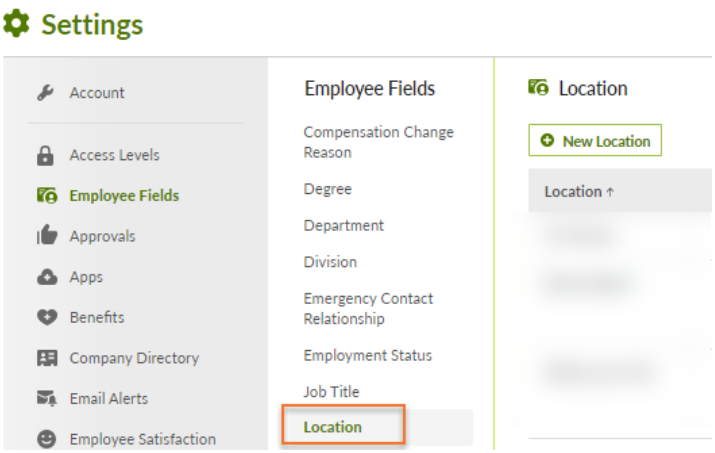
☐ **4. LOCATIONS:** Please confirm that the TriNet and BambooHR systems have identical locations. Although it is not case sensitive, it is a good practice to have an exact match.

In the future, all US-based locations must be kept in sync manually. When locations are opened or closed, **updates to both systems are necessary to ensure that BambooHR “Location Name” field = TriNet “Location Description”.**

Update TriNet under **Admin/Manager View** > **Company Administration** > **Departments and Locations > Locations:**



Update BambooHR under **Settings** > **Employee Fields** > **Locations:**



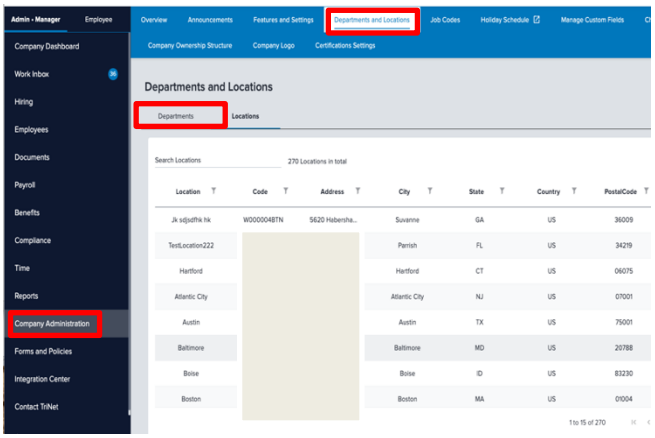
Pre-Integration Checklist (cont.)

☐ **5. DEPARTMENTS/DIVISIONS:** Please confirm that the TriNet and BambooHR systems have identical Departments or Divisions. Although it is not case sensitive, it is a good practice to have an exact match.

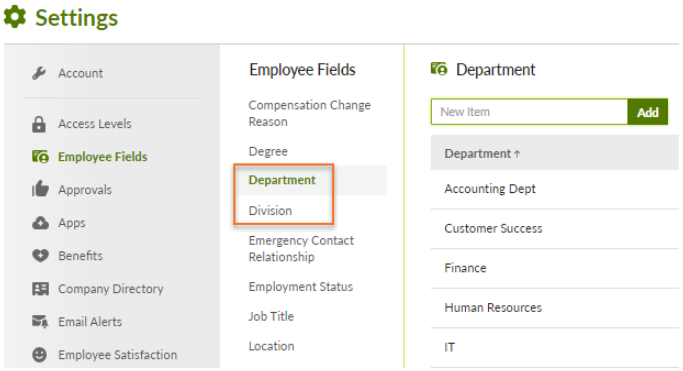
BambooHR has two organizational units (Divisions and Departments), while TriNet has only one (Departments). As part of the integration, you may choose which BambooHR unit you want to map to TriNet.

Once a decision is made, in the future, all departments/divisions must be kept in sync manually. When new departments/divisions are opened or closed, **updates to both systems are necessary to ensure that BambooHR "Department New Item" field OR "Division New Item" field = TriNet "Department Name".**

Update TriNet under **Admin/Manager View** > **Company Administration** > **Departments:**



Update BambooHR under **Settings** > **Employee Fields** > **Department** or **Division:**



☐ **6. COMPENSATION CHANGE REASONS:** Determine to which field each of your BambooHR compensation change reasons will map to in TriNet.

TriNet offers three categories to record changes to worksite employee compensation (Pay Change, Promotion and Demotion), while BambooHR allows clients to customize this list as needed.

Before you begin the integration, align the BambooHR reasons with TriNet by creating a 1-to-1 match, or add custom reasons tailored to your business. Then, enter the BambooHR mapping below.

NOTE

Each BambooHR reason can be mapped to **only one** TriNet reason code.

- For example, the "Merit" reason from BambooHR cannot be mapped to two different reason codes at TriNet.

Multiple BambooHR reasons **can** be mapped to a single TriNet reason code.

- For example, "Merit" and "Performance Review" can be mapped to the same reason code at TriNet.
- Separate multiple codes with a semi-colon with no spaces (Merit;Performance Review)

Pre-Integration Checklist (cont.)

Step 6 continued...
Complete this mapping exercise:

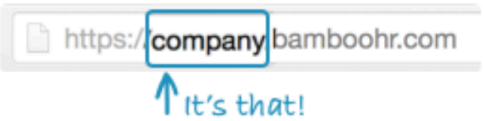
TriNet change type CATEGORY	**TriNet Reason Description** SUBCATEGORY	**TriNet Reason Code**	**BambooHR Compensation Change Reason** (Settings > Employee Fields > Compensation Change Reason)
Pay change	Equity	EQA	
Pay change	Market Adjustment	MAR	
Pay change	Merit	MER	
Pay change	New Position	JOB	
Promotion	Higher Level Job	XFR	
Promotion	Job Evaluation	EVL	
Promotion	Noncompetitive Promotion	NCP	
Demotion	INV-Business Based	IDB	
Demotion	INV-Performance Based	IPR	
Demotion	Job Evaluation	EVL	
Demotion	VOL Downward Change	VRJ	

☐ **7. BAMBOOHR API KEY**: A BambooHR API Key is required for TriNet to connect to BambooHR. Please have it available when configuring the integration.

According to instructions on BambooHR, to generate an API Key, log in to BambooHR as an Administrator and click your name in the upper right-hand corner of any page to get to the user context menu. If you have sufficient permissions, there will be an "API Keys" option in that menu to go to the page.

Please refer to the BambooHR website if you have any trouble generating an API Key.

☐ **8. BAMBOOHR SUBDOMAIN:**
Log into BambooHR and look at the address bar. The text just before **.bamboohr.com** is your subdomain.



☐ **9. TRINET INTEGRATION ADMIN ROLE** You will need the role of Integration Administrator to complete this set up. If you do not have this role, contact the HR Security role holder at your company.

☐ **10. BEGIN THE INTEGRATION** Begin the BambooHR Integration setup or reach out to Connect 360 for assistance.

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