BambooHR + goPayroll

goPayroll provides built-in support for importing attendance data direct from BambooHR (bamboohr.com) via it's API, as well as adding staff records from either source (*from BambooHR to SmoothPay and vice versa, depending on which end you load staff records*).

The BambooHR + goPayroll integration

Choose *Payrun..Import..BambooHR*:

BambooHR integration tool

This will open the BambooHR integration tool which provides access to the timesheet importer, staff transfer and configuration options.

> In order for goPayroll to talk to BambooHR you need to establish an **API Access Key** in BambooHR and enter that value into the Configure section.
>
> The following section describes the Configure process.

Configuration

Log on to your domain at BambooHR, then select **My Devices & API Keys** where you can set up your SmoothPay integration and obtain a long term token.
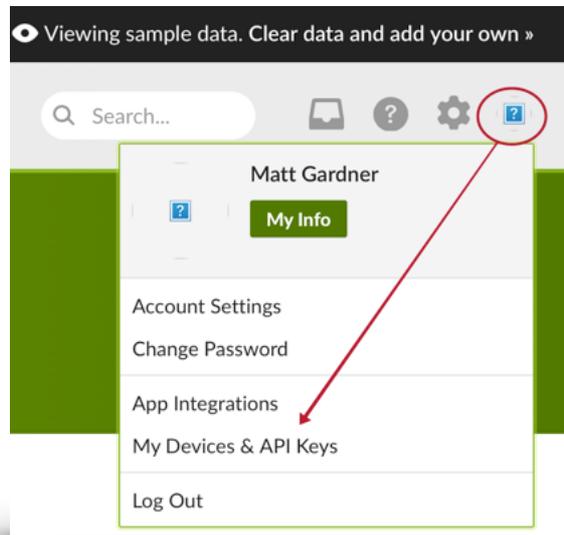
Copy the Access Token (highlight the token then CTRL+C or click COPY KEY)

1. you can call the API key anything you want (*e.g. "payroll" or "gopayroll"*)
2. an API Key will be generated and it needs to be copied to the API Key field in goPayroll's BambooHR configuration.
3. Click Done to save it

If you mess up, no problem, just delete any unused keys and try again.

The user really needs to be the owner or a top-level administrator, otherwise some functions may not operate as expected.

In goPayroll go to *Payrun..Import..BambooHR..Configure* and paste (*Edit..Paste or CTRL+V*) in the **API Access Key** field:

To send new staff records to BambooHR you *MUST* have a **badge number** assigned in their Contract tab (*in goPayroll*).

To receive new staff records from BambooHR you *MUST* set an **Employee Number** in the employee's Personal record (*in BambooHR*).

Importing timesheet data

You must be using the optional **Time Tracking module in BambooHR** to use this facility.

Unfortunately, other than for time off requests, there's no easy way to use the API to gather attendance data - they built it to receive attendance data, not to retrieve that data in bulk.

Fortunately, goPayroll provides Flexi-CSV import tool that can easily handle the rudimentary CSV extract provided by BambooHR.

Run the **Payroll Hours report in BambooHR** then export to CSV.

In goPayroll, use *Payrun..Import..Flexi-CSV* to import the attendance transactions (*columnar format*).

Data Import Notes:

- **Badge #:** Imported data will be matched against an Employee's *Badge Number*. This *Badge Number* must match the BambooHR *Employee Number*. *Badge Numbers* are established in SmoothPay's *Contract* Setup page, Employee Numbers are established in BambooHR's Personal tab.

- **Importing data is ADDITIVE**! If you import the same data twice, you'll get double entries. You can easily scrap the current pay entries if you need to using the Who To Pay screen and selecting None. You're now ready to re-import.

- **BambooHR Timeclock** provides paycodes for work and leave pay codes and optionally allows Projects and Tasks (*which map to Jobs and Activities in goPayroll*). Unfortunately, none of those codes are represented in the rudimentary CSV export.

- **BambooHR Timeclock** does NOT provide for capture of allowances, deductions, days paid, total hours worked etc. - it only captures work and leave

Adding employees (from either source)

Choose **Update staff** to access the update options:
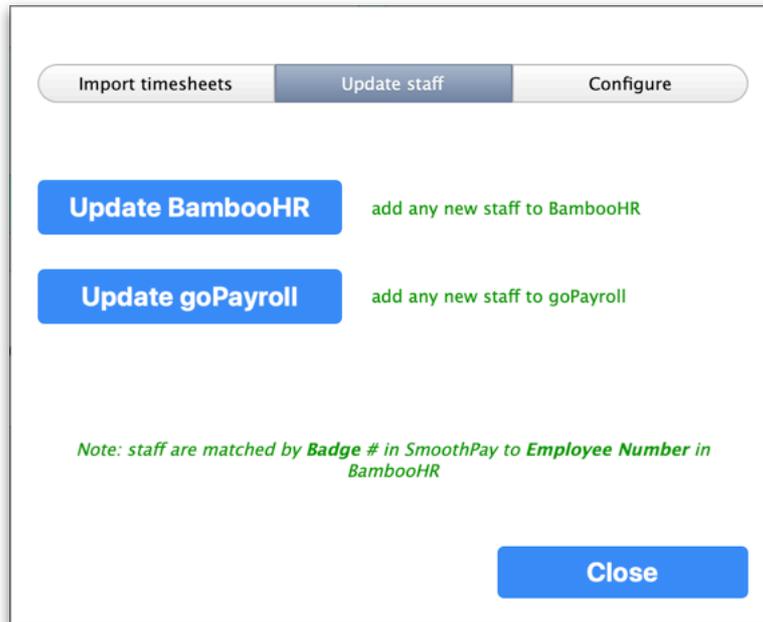
Any new badge numbers not found in the target system will result in a new employee record being created (*which you then need to edit to complete any additional information required*).

BambooHR is powerful Human Resources management system available online and through mobile applications.

It can also provide optional Time Tracking, though it's somewhat limited.

Scheduled leave entered in BambooHR should make it's way into the timesheet transactions for the period concerned (*assuming it's approved*)

Imported data will be matched against an Employee's *Badge (Contract tab)*. This *Badge Number* is the same as the BambooHR *Employee Number.*

Unless a leave entry is detected, then all time is considered to be ordinary time or overtime, and is subject to any meal-break, rounding and auto-overtime rules you might have defined globally or per employee if you select that option when importing the CSV data.

NZ Users: BambooHR makes no provision for New Zealand's unique leave rules, as all time is deemed to be in hours

- **Annual leave**: The Holidays Act prescribes weeks as the units of accrual, valuation and consumption. If presented with hours, SmoothPay calculates the value as being [units x payrate / BestWeeklyValue] to determine the proportion of a week for annual leave being consumed.

- **Daily leave types** (sick, public, alternative, bereavement etc): there is no provision in BambooHR to record the "days" component for the leave taken. We can't use a proportion as we do for annual leave (*though we could use a proportion of average daily pay, it wouldn't necessarily be correct*) and we simply generate a result based on [units x payrate] and set the days consumed to 1. This will often require editing once it hits payroll, as the time could be 1 day, .5 day etc.

- **Public Holiday (Worked)**: this presents it's own special set of problems, as neither system can necessarily determine if a day worked would have otherwise been a working day, and thus entitle the employee to accrue an Alternative day. You could use a leave code to represent public worked (no accrual/not normally worked), and public worked (with accrual/normally worked)

- **Days paid**: despite retrieving dated data from BambooHR, it may be that leave isn't recorded in BambooHR, just time worked. You are required to accurately record days paid every period to maintain the accuracy of average daily pay calculations. BambooHR doesn't provide a DAYS value in the dataset, so the employee's contract default value is used (*5 days by default, but able to be tailored per employee*)

- **Total Hours Worked and Paid Rest Breaks**: BambooHR does not provide for piecework requirements in NZ

Leave for other countries will be processed according to rules applicable to the leave code used (*assuming they're accrued and consumed in hours*).

There is no provision for payment of special allowances or deductions in BambooHR.

Definitive leave balance and value information should be referenced from goPayroll.

Feedback

We're always keen to do better!

Any and all feedback is appreciated and if you feel we could include better examples, provide more explanation, provide references to additional information, make a process easier to use, or you spot something that isn't working the way it's supposed to - please let us know.