



SimplyMerit Import / Export Guide - BambooHR



Overview

This guide will walk you through the process of moving data between BambooHR and SimplyMerit for your compensation cycles. This represents what data is available in a vanilla install of BambooHR. However, because BambooHR is so highly customizable, you may need to replicate those customizations in the data file that is moved between the two platforms.

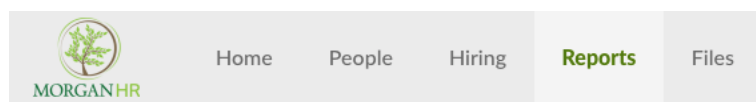
Importing Data into SimplyMerit from BambooHR

The general flow to import data into SimplyMerit from BambooHR is...

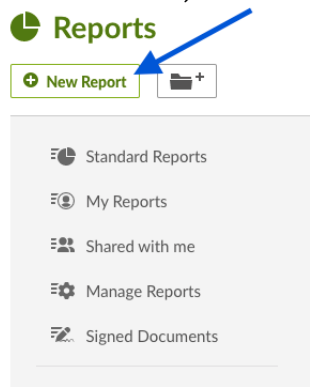
1. Build a new Report in BambooHR. This will be the standard report that you use going forward to build the export file from BambooHR to feed SimplyMerit.
2. Run the report and export the data to CSV
3. Rename the field headers and adjust for data naming conventions and formats as detailed below
4. Import the file using SimplyMerit's Universal data importer
5. Repeat steps 2 – 4 any time that you need to apply bulk changes

Step 1: Run Report in BambooHR

1. Log into your BambooHR environment and click on “Reports” at the top of the screen.



2. Along the left-hand side of the screen, click on “New Report”



3. Enter a Report Name

New Report

Report Name*

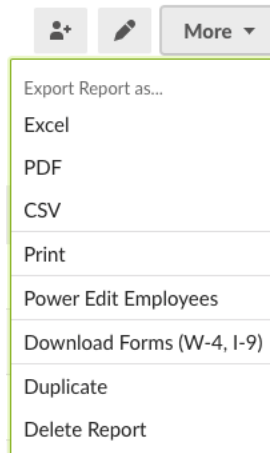
4. Under “Choose Fields,” select the following fields:

- Personal
 - Employee #
 - First Name
 - Last Name
 - Country
 - Work Email
- Job
 - Hire Date
 - Employment Status
 - Employment Status
 - Job Information
 - Division
 - Department
 - Job Title
 - Compensation
 - Pay Rate
 - Pay rate – Currency code
 - Pay Type
 - Calculated
 - Supervisor ID
 - Termination Date

5. Include any additional data fields that should be part of this process that are also supported in SimplyMerit’s data model (including custom fields). Please refer to “SimplyMerit Data Dictionary – BambooHR” available at <https://www.simplymerit.com/faq> (near the bottom of the page).

Step 2: Run the Report and Save to CSV

1. Click on “Save” to save and run the report
2. Click on “More” in the upper right-hand side of the screen and select “CSV.”
BambooHR will download the CSV data file to your computer.



Step 3: Adjust Data

1. Open the CSV that was downloaded to your computer
2. Rename column headers using the following conventions:

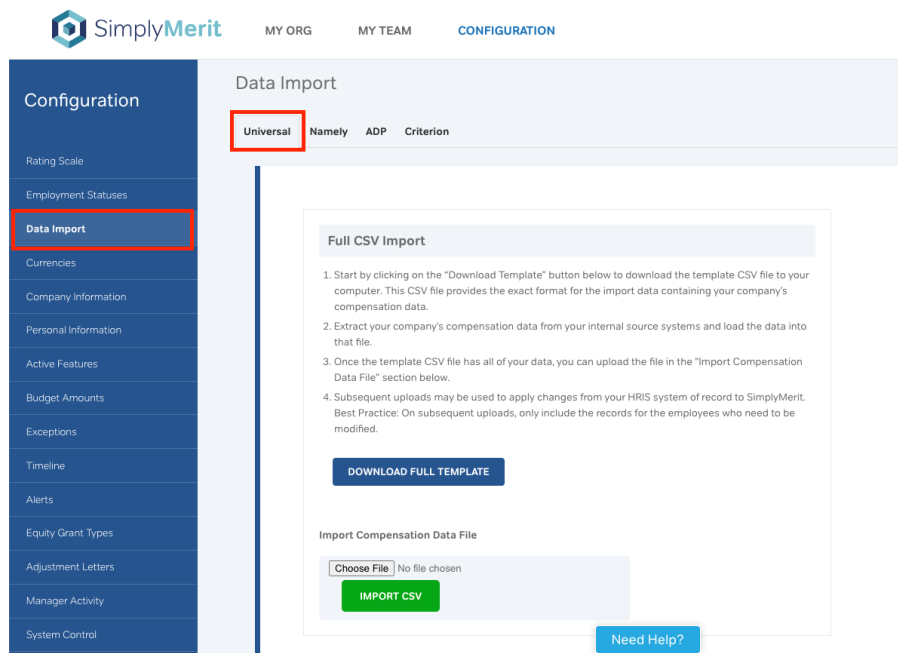
Bamboo Data Field	SimplyMerit Data Field
ADDITIONAL REQUIRED FIELDS - INSERT THE FOLLOWING NEW COLUMNS	
	IS_ADMIN
	enable_invitation

3. Adjust naming conventions and formats (apply to all rows):
 - ft_pt - =IF(G2="Part-Time","pt","ft")
 - FLSA_STATUS - =IF(M2="Hourly","non-exempt","exempt")
 - IS_ADMIN - Set the entire column to "no" then change to "yes" for employees who should also have full Admin rights to SimplyMerit
 - enable_invitation - If all managers are to be invited into SimplyMerit, then simply set the entire column to "yes" as SimplyMerit will only send invitations out to (a) employees where this value is set to "yes" and (b) only people managers (have direct reports) in SimplyMerit. Otherwise, selective adjust to either "yes" (should receive an invitation) or "no" (should not receive an invitation).

Step 4: Import into SimplyMerit

Now that you have created the CSV data file that will be imported into SimplyMerit, it's time to log into SimplyMerit as the HR Administrator.

On the Configuration | Data Import screen, choose the Universal tab in order to import your CSV file.



The screenshot shows the SimplyMerit user interface. At the top, there is a navigation bar with the SimplyMerit logo and three tabs: "MY ORG", "MY TEAM", and "CONFIGURATION". The "CONFIGURATION" tab is active. On the left side, there is a vertical sidebar menu with various configuration options. The "Data Import" option is highlighted with a red box. The main content area is titled "Data Import" and has four tabs: "Universal", "Namely", "ADP", and "Criterion". The "Universal" tab is selected and highlighted with a red box. Below the tabs, there is a section titled "Full CSV Import" with a list of four numbered steps: 1. Start by clicking on the "Download Template" button below to download the template CSV file to your computer. This CSV file provides the exact format for the import data containing your company's compensation data. 2. Extract your company's compensation data from your internal source systems and load the data into that file. 3. Once the template CSV file has all of your data, you can upload the file in the "Import Compensation Data File" section below. 4. Subsequent uploads may be used to apply changes from your HRIS system of record to SimplyMerit. Best Practice: On subsequent uploads, only include the records for the employees who need to be modified. Below the steps, there is a blue button labeled "DOWNLOAD FULL TEMPLATE". Underneath, there is a section titled "Import Compensation Data File" with a file upload area. The file upload area has a "Choose File" button and the text "No file chosen". Below the file upload area is a green button labeled "IMPORT CSV". At the bottom right of the main content area, there is a blue button labeled "Need Help?".

On this screen, click on "Choose File" to locate the CSV file and then click the "Import CSV" button. Refer to the "Getting Started Guide for HR Admins" documentation available by clicking on the "Need Help?" button on any of the Configuration screens and choosing the FAQ link.

Subsequent Imports

With SimplyMerit, you may refresh your data from BambooHR at any time. Simply follow these steps:

1. Log into BambooHR and run your SimplyMerit report
2. Save to CSV and apply the updates from Step 3 above
3. Import the updated file into SimplyMerit from the Configuration | Data Import tab.

Additional notes about Subsequent Imports:

- Take care to not import any “preload” fields that may have been modified by managers already unless you intend to override their work. These are any of the fields that managers edit like Merit %, Promotion %, Bonus Performance Factor, etc.

These “preload” fields are not typically part of the BambooHR export anyways. However, if you’ve added them to the CSV, make sure that they are not present (unless intended) in the subsequent import files.

- You do not have to import all of your employees on subsequent imports. In fact, it’s recommended that you include only the employees who need to be updated to speed up the import process.
- You may also include only the fields that need to be updated on subsequent imports. You will want to make sure to include the EMP_ID column as SimplyMerit uses this as the unique identifier for each employee.

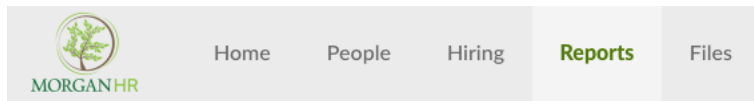
If you have any questions, please contact us at support@simplymerit.com or +1-847-719-9060 x3.

Salary History

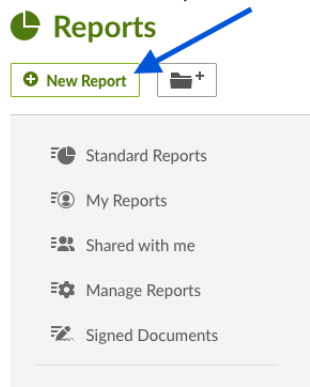
The following steps will help with extracting salary history information from BambooHR for loading into SimplyMerit.

Step 1: Run Report in BambooHR

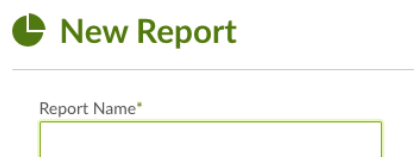
1. Log into your BambooHR environment and click on “Reports” at the top of the screen.



2. Along the left-hand side of the screen, click on “New Report”



3. Enter a Report Name



4. Under “Choose Fields,” select the following fields:
 - Personal
 - Employee #
 - First Name
 - Last Name
 - Job
 - Compensation
 - Effective Date
 - Pay Rate
 - Pay rate – Currency code

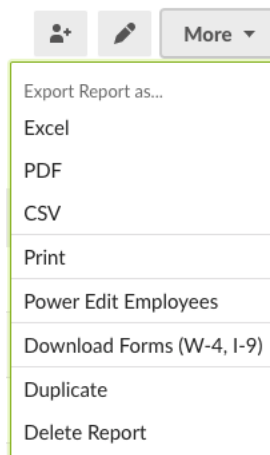
- Change Reason
- Comment

5. Additional fields that may be added to the history export

- Total Bonus
- Total Equity
- Total Comp
- Performance Rating Score

Step 2: Run the Report and Save to CSV

1. Click on “Save” to save and run the report
2. Click on “More” in the upper right-hand side of the screen and select “CSV.” BambooHR will download the CSV data file to your computer.



Step 3: Contact SimplyMerit Support

Here’s the easiest part... ship us the file through our Citrix ShareFile secure file transfer method, and we’ll adjust it for loading into SimplyMerit for you. Simply contact us at support@simplymerit.com or +1-847-719-9060 x3 so that we can setup your ShareFile account for you.

SimplyMerit is expecting the data in an entirely different format than how it’s exported from BambooHR. As such, we’ve built a standard process to “flip” the data from multiple rows per employee to all history on a single row. We’ll prepare the data file and send it back to you for review and loading when you’re ready.