

# Activating the BambooHR Integration

# Determining your Sub-Domain

Provide this URL to TazWorks. The "tazworkssandbox2" portion of this will be different for you and it is your company's unique sub-domain.

Home icon  
Bill Brooks

Bereavement 0 DAYS USED (YTD)  
COVID-19 Related Absen... 0 HOURS USED (YTD)  
**Request Time Off**

Who's Out  
TODAY  
Nobody requested time off Today  
TOMORROW  
Nobody requested time off Tomorrow  
SATURDAY, AUG 21  
Nobody requested time off for Saturday

whitney webster  
Aug 12 - Happy Birthday!  
Celebrations

hi.  
**Welcome, Bill!**  
You're looking at BambooHR, your new tool for work. Here's a quick look at some of the things you can do with BambooHR.

 <b>Request Time Off</b> Request time off and check your balances.	 <b>Company Directory</b> Search for coworkers and their contact info.	 <b>Reporting</b> View and create the reports you need.
 <b>Training</b> Stay on top of your trainings and certifications.	 <b>Onboarding / Offboarding</b> Create tasks to make the process run smoothly.	 <b>Mobile Apps</b> BambooHR goes with you on iOS and Android.

# Creating an API User

This user will manage the communication between BambooHR and TazWorks

# People (89)

Quick access to the directory

+ New Employee

List Directory Org Chart



Showing Active (89)

2. Select "New Employee"

1. Select "People"

Employee photo	Employee #	Last Name, First Name	Job Title	Location	Employment Status	Hire Date
	123212321	Jones, Clarissa	Account Executive	Lindon, Utah	Full-Time	03/22/2021
	103	Reed, Norma	Sr. Director of UI/UX	Lindon, Utah	Full-Time	12/18/2018
	102	Zurdette, Chad	Account Executive	Lindon, Utah	Full-Time	02/05/2020
	101	Xu, Yun	Account Executive	Vancouver, Canada	Full-Time	03/07/2020

## New Employee

[Customize Add Employee Form](#)

**hi.** Make everyone's life a little bit easier and send a new hire packet.

Your new employee will be able to enter their own personal information, sign paperwork, see their team, and more.

Send this new employee a new hire packet

Give the employee a name of TazWorks Integration or something similar.

Name

Preferred Name

Birth Date



Gender

Marital Status

SSN

-Select-

Ethnicity

-Select-

 Contact

Phone





 Home Phone

Email

 Work Email

 Home Email


This user will need an accessible email address. This inbox will not need to be regularly checked, but is needed to receive the initial password setup email.




 Job

Hire Date

mm/dd/yyyy 


 Employment Status

Employment Status

 Employment Status

Employment Status

-Select-

 Job Information

Job Title

-Select-

Reports To

-Select-

Department

-Select-

Division

-Select-


Location

-Select-

1. Select "Allow Access to BambooHR"



 Self-service access

**Allow Access to BambooHR**  
They will be able to login to BambooHR using the access level you choose. 

**No Access**  
They won't have access and will not be able to login to BambooHR.

Employees US

Save

2. Select "Save"



example@example.com

# TazWorks Integration

1. Select "Settings"

- Personal**
- Job
- Time Off
- Documents
- Benefits
- Training
- Assets
- No

- Request Signature
- Download Forms (W-4, I-9)
- BambooHR Access Level Employees US
- Preview as This User
- Reset User's Password**
- Terminate Employee...

2. Select "Reset User's Password"

## Personal

### Basic Information

Employee #  Status

Name  Preferred Name

Birth Date

Gender  Marital Status

SSN

Tax File Number



## Reset password for TazWorks?

An email with a link to reset their password will be sent to `example@example.com`

1. Select "Reset Password"



**Reset Password**

Cancel

2. Follow the directions in the email to configure a password for this user. You do not need to store this password long-term, but will need to save it temporarily for use during this guide.

# Creating a new Access Level for the API User

3. Select "Add"

1. Select "Settings"

2. Select "Access Levels"

4. Select "Custom Access Level"

# Settings

Account

Access Levels

Employee Fields

Approvals

Benefits

Company Directory

Email Alerts

Employee Satisfaction

Hiring

Holidays

Logo & Color

Offboarding

Onboarding

Payroll

Levels



All (90)

All (90)

Full Admin (3)

Employee Levels

Employees Australia (0)

Employees Canada (0)

Employees UK (12)

Employees US (63)

Manager Levels

Managers Australia (0)

Managers Canada (0)

Managers UK (0)

Managers US (0)

Custom Levels

Benefits Administrator (0)

Finance (0)

Employee Access Level  
For Employees who should never see sensitive information for anyone but themselves.

Manager Access Level  
For Employees who can only see information for indirect and/or direct reports.

Custom Access Level  
For Employees who can see and/or edit information for all employees.

...determine their access to information in BambooHR.

level Last Login

Employees US

Aug 23, 2020 at 3:26 PM

Employees US

Amy Granger

Employees US

Feb 23 at 8:23 AM

Andy Graves

Employees US

Anthony Diaz

Employees US

Anthony Larsen

Employees US

Antonio Kruz

Employees UK

Ashley Adams

Employees US

Feb 2 at 8:26 AM

Bill Brooks

Full Admin

Today at 1:33 PM

← Access Levels

## New Custom Access Level

**1 Basic Info**

2 What this Access Level Can Do

3 What this Access Level Can See

Custom Access Levels can be configured to allow Employees to see and/or edit information for some or all employees in your company.

Access Level Name \*

TazWorks Integration

1. Give this a name of "TazWorks Integration" or similar.

Description

Used by the TazWorks Integration user.

Next Step

2. Select "Next Step"

← Access Levels

## 🔒 New Custom Access Level TazWorks Integration

- ✓ Basic Info
- 2 What this Access Level Can Do**
- 3 What this Access Level Can See

### What Can People with this Access Level Do?

Select an area to customize access.

1. Select "Hiring"

👤 Employees

📄 **Hiring**

📊 Reports

📁 Company Files

⚙️ Settings

### Hiring

**Manage Job Openings and Candidates**  
Can post new and edit Job Openings, add and edit Candidates

Send and Manage Offer Letters

Important: the names of files attached to offer letter templates are viewable by anyone with this permission, regardless of individual file permissions.

2. Select "Manage Job Openings and Candidates"

3. Select "Next Step"

**Next Step**

Previous Step

Cancel


← Access Levels


## New Custom Access Level TazWorks Integration


- Basic Info
- What this Access Level Can Do
- 3 What this Access Level Can See**


What Can People with this Access Level See?

 **See About other Employees**  
Choose what people with this Access Level will see about other employees.

 See About Themselves  
Choose what people with this Access Level will see about themselves.

 See on Home  
Choose what should show on Home for people with this Access Level.


 This Access Level can access the information below for [All Employees](#) ▾

-  **Personal** Job Time Off Documents Benefits Performance Training Assets Notes Emergency Onboarding [More](#) ▾

### Personal

[All Fields are set to No Access](#) ▾  
Set all fields to No Access to hide the Personal tab.

▸ Basic Info

 No Access

Select "Save & Finish"

First Name, Preferred Name, Birth Date, Gender, Marital Status, SSN, Tax File  
Locations

Save & Finish

Previous Step

Cancel

Assign the New Access Level  
to the API User

# People (90)

Quick access to the directory

+ New Employee

List Directory Org Chart



Showing Active (90)

Employee photo	Employee # ↑	Last Name, First Name	Job Title	Location	Employment Status	Hire Date
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Integration, TazWorks

2. Select the API User that was created



Brooks, Bill



Doe, John



Blasdell, Jordan



example@example.com

# TazWorks Integration

- Personal**
- Job
- Time Off
- Documents
- Benefits

## Personal

### Basic Information

Employee #

Name

Birth Date

Gender

Marital Status

SSN

Tax File Number

3. Select the new access level we created earlier.

1. Select "Settings"



- Managers US (0)
- Custom Levels
- Benefits Administrator (0)
- Finance (0)
- IT (0)
- Recruitment (0)
- Sales (0)
- TazWorks Integration (0)**
- Training and Development (0)
- No Access (1)
- Multiple Access Levels

2. Select "BambooHR Access Level"

- Request Signature
- Download Forms (W-4, I-9)
- BambooHR Access Level, Employees US**
- Preview as This User
- Reset User's Password


# Add New Candidate Statuses for Active Jobs





1. Select "Settings"


## Settings

3. Select "Candidate Statuses"


 Account

 Access Levels

 Employee Fields


 Approvals

 Apps


 Benefits


2. Select "Hiring"

 Email Alerts


 Employee Satisfaction

 **Hiring**

 Holidays

 Logo & Color

 Offboarding

 Onboarding

Hiring

**Candidate Statuses**

Candidate Sources


Email Templates

Offer Templates

### Candidate Statuses

Add Default Status

Status Name

 Active Statuses

Reviewed


Schedule Phone Screen

Phone Screened

Interviewed

Checking References

+ Add Status

 Not Hired Because...

Not a Fit


Declined Offer

Not Qualified


4. Under the Active Statuses group, select "+Add Status"

## Settings


 Account

 Access Levels


 Employee Fields


 Approvals

 Apps


 Benefits


 **1. Type in the following status:**  
*Background Check Required*


 Email Alerts


 Employee Satisfaction

 **Hiring**

 Holidays

 Logo & Color

 Offboarding

 Onboarding

### Hiring

#### Candidate Statuses

Candidate Sources


Email Templates

Offer Templates

### Candidate Statuses

Add Default Status

Status Name

 Active Statuses

Reviewed

Schedule Phone Screen

**2. Select "Add" to add the new status**

Phone Screen

Interviewed


Checking References

Background Check Required

Add


Cancel


Press return to quickly add multiple statuses.


 Not Hired Because...


Not a Fit

Declined Offer


 Account


 Access Levels


 Employee Fields


 Approvals

 Apps

 Benefits

 Company Directory

 Email Alerts

 Employee Satisfaction

### Hiring

**Candidate Statuses**

Candidate Sources


Email Templates

Offer Templates

### Candidate Statuses

Add Default Status

Status Name

 Active Statuses

Reviewed

Schedule Phone Screen

Phone Screened

Interviewed

Checking References

Background Check Required

Background Check In-Process

Background Check Error

Background Check Completed


Background Check Canceled


+ Add Status


 Not Hired Because...

Not a Fit


Repeat this process to add the rest of the statuses:  
*Background Check In-Process*  
*Background Check Error*  
*Background Check Completed*  
*Background Check Canceled*

 Onboarding

 Payroll

 Performance

 Time Off

 Time Tracking

# TazWorks Configuration

At this point, the TazWorks team will need to configure the integration from their end using the information you have provided them.

# Granting TazWorks Access to Use Your API User

TazWorks will send you a link you will need to click.

Upon clicking the link, you will be redirected to the BambooHR login page.

The image shows a screenshot of the BambooHR login page. At the top center, there is a green circular logo with a white 'b' followed by the text 'COMPANY LOGO HERE'. Below this, there are two input fields: the first is labeled 'Email' with an envelope icon, and the second is labeled 'Password' with a key icon. Below the input fields, there is a green 'Log In' button and a link for 'Forgot Password?'. At the bottom left, there is a 'Privacy Policy' link. At the bottom right, there is the 'bambooHR' logo. Two blue callout boxes with white text and arrows provide instructions: one points to the input fields and the other points to the 'Log In' button.

1. Provide the credentials for the API User you created earlier.

2. Select "Login In"

Privacy Policy

bambooHR®

A screenshot of a web browser interface. At the top, there is a grey header bar with a search icon, a tab with a close button, and a plus sign for new tabs. Below this is a navigation bar with back, forward, and refresh icons, and a lock icon next to a blurred address bar. The main content area is white and features the word "Success" in a large, bold, blue serif font. A blue arrow points upwards from a blue text box below to the word "Success".

**Success**

If your credentials are valid, you will see a "Success" message or similar. You have now granted TazWorks access act on behalf of your API User. You can now purge the API user's login and password you temporarily stored.

Ready to Submit Test Order

# Create Test Job and Test Candidate

We will create a test job and a test candidate. You may also use an existing job for this test. If you wish to use an existing job, please review this part of the guide, anyway, for important notes.

# Hiring

Job Openings

Candidates

[View Careers Website](#) · [Get Embed Code](#)

**Add Job Opening**

1. Select "Hiring"

2. Select "Add Job Opening"

2 of 25 open · Show

Draft & Open



Candidates	Job Opening	Hiring Lead	Created On	Status
1	Test position Lindon, Utah	Aaron Eckerly	Jun 4, 2021 2 months ago	Draft
3	Software Engineer 4 sandy, Utah	Aaron Eckerly	Mar 22, 2021 5 months ago	Open
6	Software Engineer Sydney, New South Wales	Maja Andev	Oct 23, 2020 10 months ago	Draft
7 2 NEW	General Application Lindon, Utah	Olivia Sterling	Oct 21, 2020 10 months ago	Open
	Videographer Lindon, Utah	Trent Walsh	Oct 21, 2020 10 months ago	Draft
4	IT Security Engineer Mayfair, London, City of	Eric Asture	Oct 21, 2020 10 months ago	Draft

1. The Posting Title is what BambooHR will send to TazWorks as the Package Name. Therefore, be sure that your Posting Title is also configured as a package within Instascreen.



Posting Title \*

Forklift Operator - \$500 Signup Bonus

Job Status \*

Open

2. The Job Status should be Open. BambooHR will not submit background screenings orders for closed jobs.

Hiring Lead \*

Adam Hunter

-Select-

Employment Type \*

Full-Time

Minimum Experience

Mid-level

Job Description \*

Lato 15px **B** *I* U A    

Just a test job.

3. Select "Save Job Opening" when done.

Save Job Opening

Preview Application

Cancel

# Forklift Operator - \$500 Signup Bonus

Lindon, Utah

[Edit Job Opening](#)  

 Hiring Lead  
Adam Hunter | Status: Open | Open: 0 Days

Just a test job.

Take a peek at your job listing.  
[Preview Job Listing](#)

Select "New Candidate"

[View Full Job Description](#)

 0 Candidates [+ New Candidate](#)

Statuses   

<input type="checkbox"/>	Candidate Info	Status	Rating	Applied	Last Email
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← Forklift Operator - \$500 Signup Bonus - Lindon, Utah

 Add Candidate

1. Provide a First Name

2. Provide a Last Name

First Name \*

Last Name \*

Email

3. Provide an Email address

Phone

Address

City  State  ZIP

Country

4. Select "Save" to complete

Submit the Test Order

← Forklift Operator - \$500 Signup Bonus - Lindon, Utah



**Jim Tester**

Added on Aug 19, 2021 (3 minutes ago)

**Candidate Info**

Notes

Emails



Added 3 minutes ago:

New

Search...

- Interviewed
- Checking References
- Background Check Required**
- Background Check In-Process
- Background Check Error
- Background Check Completed
- Background Check Canceled

Not Hired Because...

Create Offer Letter

Hire

Set Candidate to the "Background Check Required" status to trigger the order. The order will be picked up by TazWorks within 15 minutes.

Well, this is awkward. There is no resume for Jim.

Add Info

← Forklift Operator - \$500 Signup Bonus - Lindon, Utah



**Jim Tester**





Added on Aug 19, 2021 (Yesterday) · Already in BambooHR

Once the order is picked up, the status will automatically change to indicate this and will continue to change on its own as the order processes.

 Candidate Info  **Notes (11)**  Emails

 Comments (11)  **History (27)**  All

## Candidate History


-  Status set to Background Check In-Process  
TazWorks Integration  
Today at 12:47 PM
-  Status set to Background Check Required  
Bill Brooks  
Today at 12:45 PM
-  Added to Forklift Operator - \$500 Signup Bonus  
Bill Brooks  
Yesterday at 2:32 PM
-  Added to Software Engineer 4  
Bill Brooks  
Apr 27 at 12:23 PM

Set by Bill Brooks Johnson:

Background Check In-Pro...

Email  
david.tran@meridianlink.com

### Also Considered For:

 Software Engineer 4  
Background Check completed  
Added Apr 27 (4 months ago)

 BambooHR Hiring App ×  
Review resumes, email candidates, and more with the BambooHR Hiring app.  
Get it free for iOS or Android.

← Forklift Operator - \$500 Signup Bonus - Lindon, Utah



**Jim Tester**

Added on Aug 19, 2021 (17 hours ago)

 Candidate Info  **Notes (3)**  Emails

 **Comments (1)**  History (7)  All

### Comments

BB

Add a comment

Once the order status indicates completed, a link to view the report will appear under the Candidate's Notes area.



BB

**Bill Brooks**

Today at 7:15 AM

Background check complete please use the link to check the report  
<https://support2-5.instascreen.net/editor/viewReport.taz?file=38673>

 Reply




Set by Bill Brooks Just now:

Background Check Compl... 

Email  
jim.test@example.com

Also Considered For:

 **Software Engineer 4**  
Background Check completed  
Added Apr 27 (4 months ago)

 **BambooHR Hiring App**   
Review resumes, email candidates, and more with the BambooHR Hiring app.  
Get it free for iOS or Android.

# Miscellaneous Info

# Background Package Name Limitation

BambooHR's integration with TazWorks is such that there isn't a dedicated field to indicate the background package name that needs to be ordered. The current approach is to use the Posting Title associated with each job. This means we need to ensure the Posting Title associated with the job is also added to the client's company settings within Instascreen as a package. The next page shows an example of what this may look like from the CRA's perspective.

For every position that the client will be hiring for, a background check package is configured under the client's Instascreen account. The actual product being ordered will be the Product Name that is selected, but the Alternate Name will be adjusted to match with the Position Title in BambooHR

<input type="checkbox"/> Product Name	Alternate Name
<input type="checkbox"/> Standard Screening	Forklift Operator - \$500 Signup Bonus
<input type="checkbox"/> Standard Screening	Front Desk Clerk - 2nd Shift
<input type="checkbox"/> Standard Screening	Customer Support (Remote)
<input type="checkbox"/> Executive Position Screening	Chief Financial Officer (Performance Bonuses Included!)
<input type="checkbox"/> Executive Position Screening	Logistics Operations Manager
<input type="checkbox"/> Executive Position Screening	Data Analyst Manager

# Child Account Ordering

Child Account ordering is supported via use of the job's Department field. We can configure the mapping for this field to either match the child account name or its code, but not both.

# Edit Job Opening

 Delete Job Opening

Posting Title \*

Job Status \*

Select "Open"

Optional: Pass in the child account via the Department field.



Hiring Lead \*

Department

Employment Type \*

Minimum Experience

Job Description \*

Save Job Opening

Preview Application

Cancel