NetSuite / TribeHR Integration Guide

Version 1.0 Nov. 14, 2014

Overview

This document describes how to integrate NetSuite and TribeHR. Once you have integrated the two products, you will be able to:

- Have integrated single-sign-on functionality. When a user is logged into NetSuite, they can log in to TribeHR automatically without entering another password. When they change their NetSuite password, they can still log into TribeHR automatically.
- Have employee profile syncing from TribeHR to NetSuite. When the employee profile in TribeHR changes, their profile in NetSuite is updated with the changes.

For the purpose of this integration, you must add a new administrator user to your NetSuite account. If you have questions about this, contact your NetSuite account representative.

You can perform this integration before or after employees are added to TribeHR.

To complete this integration, you must:

- be able to log in to TribeHR as an account administrator
- be able to log in to NetSuite as an account administrator
- have the login credentials of the new integration administrative user (if you do not wish to add another administrative user, then this integration will require the login credentials of one of your existing NetSuite administrators)
- have your NetSuite account ID
- if you have a OneWorld account, have your subsidiary name. To find your subsidiary, go to Lists > Employees > Employees. Each employee record has a Subsidary column.

NOTE: Ensure that each employee in NetSuite has a unique email address which match the unique email address on their employee profile in TribeHR. If employees do not have a unique email address in NetSuite, the data sync integration will automatically stop and no further syncs will be performed on that user until the issue has been corrected. If this occurs, contact your TribeHR support team for assistance in reactivating your sync (support@tribehr.com).

The following steps are sequential and require that you move back and forth between TribeHR and NetSuite, so you should have your TribeHR account open in one tab or window and your NetSuite account open in another tab or window. The application required to complete each step is shown in parentheses in the section titles.

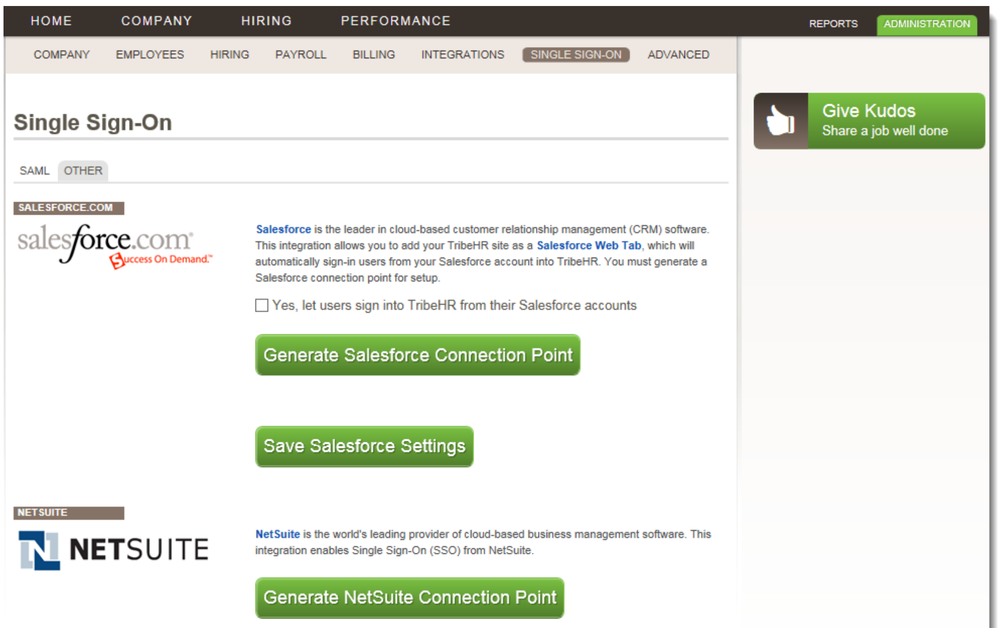
Single Sign-on

1. Generate a NetSuite Connection Point (TribeHR)

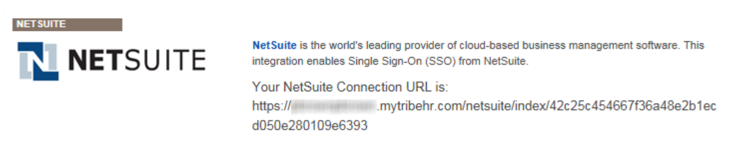
Before you can integrate your NetSuite and TribeHR accounts, you must generate a NetSuite connection point. This is a unique URL that allows NetSuite to identify and interact with your TribeHR account.

To generate a NetSuite connection point:

1. Go to Administration > Single Sign-On > Other.



2. Click **Generate NetSuite Connection Point**.



3. The Single Sign-On page refreshes and shows a URL in the NetSuite section. Select the entire URL and copy it to your computer clipboard. Later, when you configure the integration in NetSuite, you will need this URL.

2. Enable the SuiteSignOn Feature (NetSuite)

The next step is to enable the SuiteSignOn feature in NetSuite.

To enable SuiteSignOn:

1. Go to Setup > Company > Enable Features.
2. On the **SuiteCloud** subtab, under Single Sign-on, check the **SuiteSignOn** box.
3. In the NetSuite SuiteCloud Terms of Service window that appears, review the terms of service, scroll to the bottom of the window, and click **I Agree**.

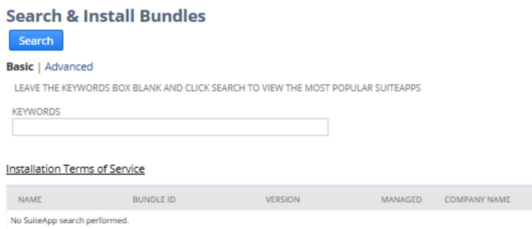
4. Click **Save**.

3. Install the TribeHR Bundle (NetSuite)

Next, you install the TribeHR bundle in NetSuite.

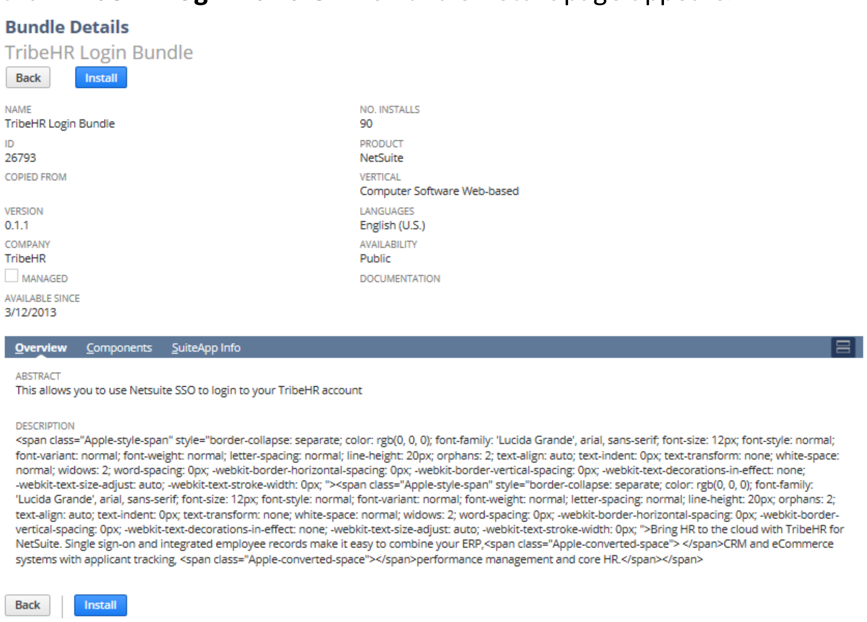
To install the TribeHR bundle:

1. Go to Customization > SuiteBundler > Search & Install Bundles.



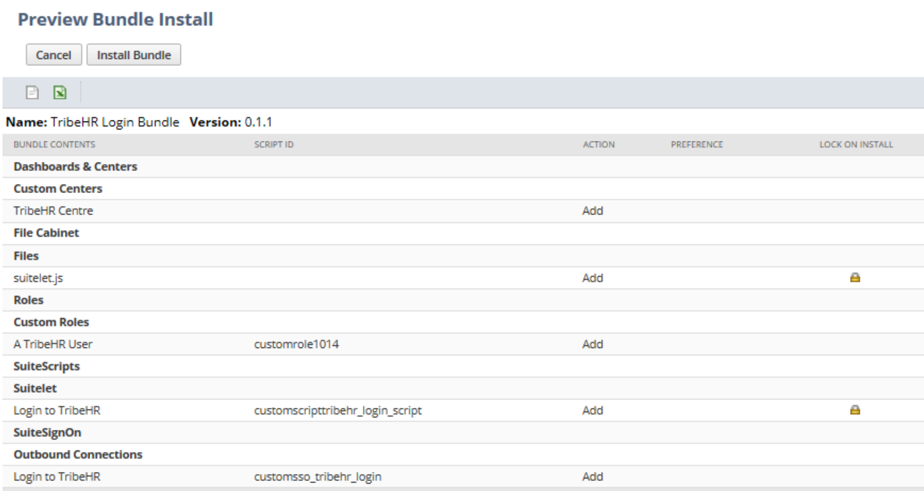
2. In the **Keywords** field, type **TribeHR** and press Enter or click **Search**.

3. Click **TribeHR Login Bundle**. The Bundle Details page appears.



4. Check the **Managed** box.

5. Click **Install**.

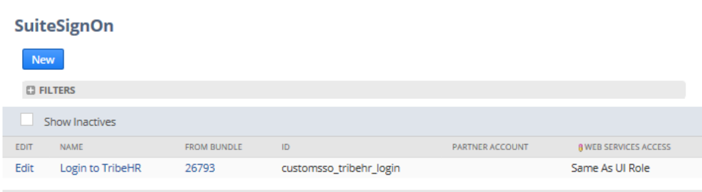


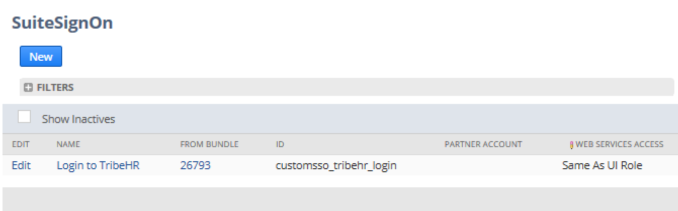
6. On the Preview Bundle Install page, click **Install Bundle**.
   A confirmation window appears.
7. Click **OK**.
8. The Installed Bundles page appears, showing the bundles that are installed on your account. While the TribeHR bundle is being installed, it might appear with **Pending...** in the **Status** column. If so, click **Refresh**. After you click **Refresh**, the TribeHR bundle should appear.

4. Edit the SSO Integration Variables (NetSuite)

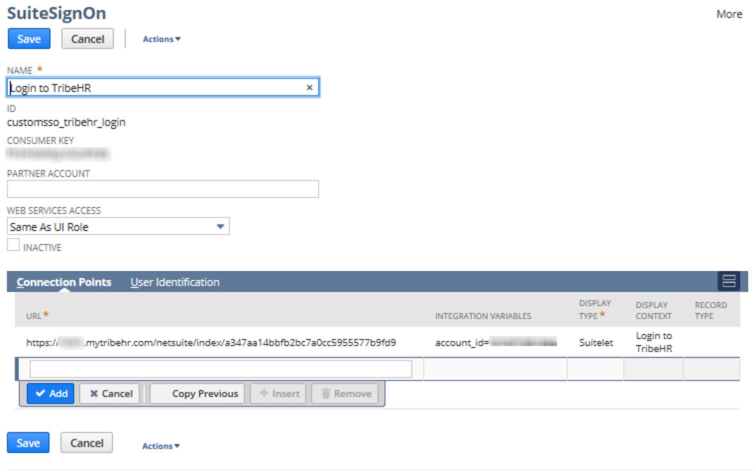
Edit the Single Sign-on (SSO) integration variables.

1. Go to Setup > Integration > SuiteSignOn.





2. Beside **Login to TribeHR**, click the **Edit** link.



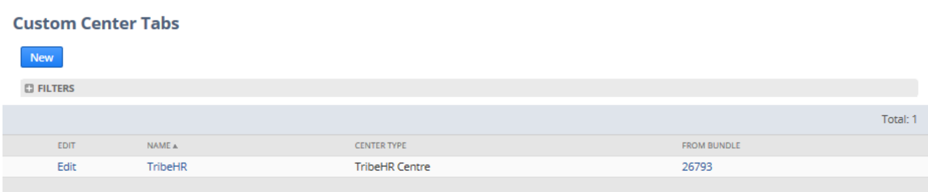
3. Under the **Connection Points** section, click and select the URL shown there, and paste the URL that you obtained as the NetSuite Connection Point in TribeHR (see Step 1). Click **OK**.
4. Click **Save**.

5. Make the Web Tab Visible to Users in NetSuite (NetSuite)

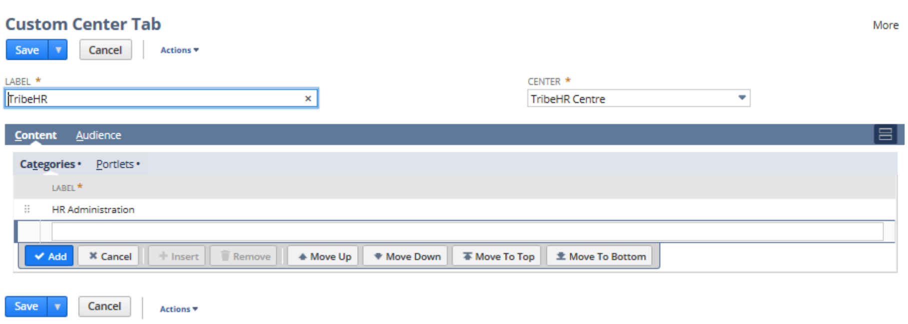
You make the TribeHR tab visible in NetSuite so that users can use single sign-on to log in into TribeHR from NetSuite.

NOTE: This method works for all roles except the Employee Center role. For information about adding single sign-on functionality to the Employee Center role, see Step 7.

1. Go to Customization > Centers and Tabs > Center Tabs.



2. Locate TribeHR in this list and click **Edit**.



3. From the **Center** dropdown list, select the center that you want the TribeHR features to be associated with. To associate TribeHR with all centers, select **All**.
4. Click **Save**.
   The TribeHR tab appears in your NetSuite account.
5. Go to TribeHR > HR Administration > Login to TribeHR.
   The TribeHR home page appears.

6. Create a New TribeHR User Role (NetSuite)

Next, create a new role and assign the TribeHR Center to it. You can then assign the new role to NetSuite users who should be permitted to sign into TribeHR. Depending on your current NetSuite installation, this may be required.

To create a new role for the TribeHR Center:

1. Go to Setup > Users/Roles > Manage Roles > New.
2. On the Role page, enter **TribeHR User** in the **Name** field.
3. In the **Center Type** field, choose **TribeHR Center**.
4. Fill out any other fields according to your company preferences.
5. Click **Save**.

To assign the new role to a user:

1. Go to Setup > Users/Roles > Manage Users.
2. On the Manage Users page, click the name of the employee to whom you want to assign this role.
3. Click **Edit**.
4. Click the **Access** subtab.
5. Under **Roles**, in the **Role** column, select **TribeHR User**.
6. Click **Add**.
7. Click **Save**.

7. Create a Single Sign-On Link in the Employee Center Role (NetSuite)

The method for adding the TribeHR tab described in Step 5 does not apply to the Employee Center role. Use this procedure to add a link that allows users to log in to TribeHR from their Employee Centre role.

To create the center category:

1. Go to Customization > Centers and Tabs > Center Categories > New.
2. On the Custom Center Category page, in the Center Type dropdown list, select **Employee Center**.
   In the **Section** dropdown list, select **Home**.
3. In the **Category** field, enter **TribeHR**.
4. In the Link dropdown list, scroll down and select **TribeHR**.
5. Click **Add**.

6. Click **Save**.

To edit the script deployment:

1. Go to Customization > Scripting > Script Deployments.
2. On the Script Deployment page, locate the **Login to TribeHR** suitelet and click **Edit**.
3. Click the Links subtab.
4. In the **Center** column, select **Employee Center**.
5. In the **Section** dropdown list, select **Home**.
6. In the **Category** dropdown list, select **TribeHR**.
7. In the **Label** column, enter **Log in to TribeHR**.
8. Click **Add**.
9. Click **Save**.

Employee Data Sync (TribeHR)

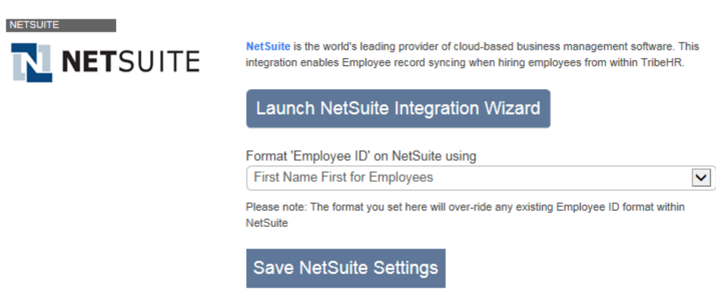
This final step requires two pieces of information:

- Your NetSuite account ID (normally a seven-digit number). If you don't know your NetSuite account ID, go to your NetSuite home page, and then go to Setup > Integration > Web Services Preferences. Your Account ID is shown here.
- The login credentials of the NetSuite administrator that you have added specifically for this integration. If you are not using the login credentials of a new administrator, then you need the login credentials of an existing NetSuite administrator.

After you enable syncing between the accounts, you enable syncing for each employee from their TribeHR employee record. (See 3. Sync an Individual Employee (TribeHR) below.)

1. Set Sync Options

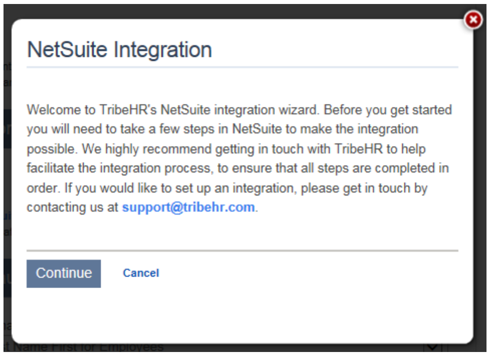
1. Go to Administration > Integrations.



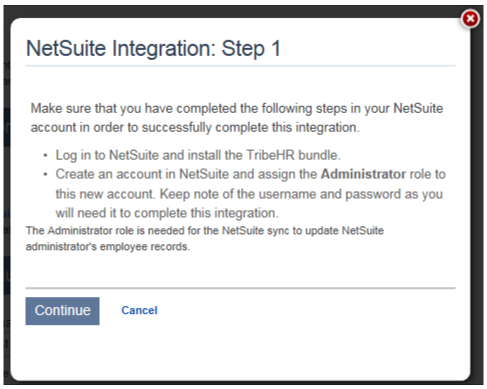
2. From the **Format 'Employee ID' on NetSuite using** dropdown list, select your preferred sync option:
   - First Name First for Employees
   - Last Name First for Employees
   - None (Don't update Employee IDs on sync)
3. Click **Save NetSuite Settings**.

2. Begin Integration Wizard

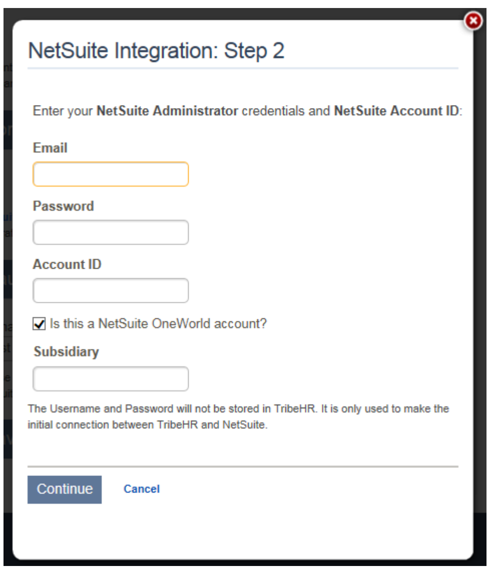
1. Click **Launch NetSuite Integration Wizard**.



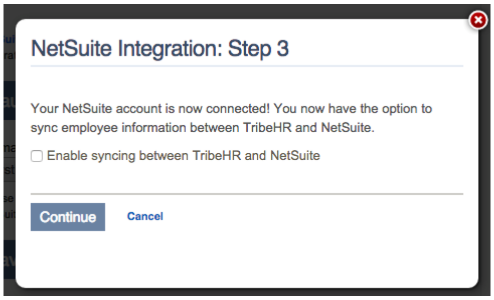
2. In the NetSuite Integration box, click **Continue**.



3. In the NetSuite Integration: Step 1 box, ensure that you have completed the requirements described, and click **Continue**.



4. In the NetSuite Integration: Step 2 box, enter the **Email** and **Password** of the administrator account you used.
5. Enter the **Account ID** of the NetSuite account.
   NOTE: To find your NetSuite Account ID, from NetSuite, go to Setup > Integration > Web Services Preferences. Your Account ID is shown here.
6. If you are using a OneWorld account, check the **Is this a NetSuite OneWorld account?** box and enter the **Subsidiary** name.
7. Click **Continue**.



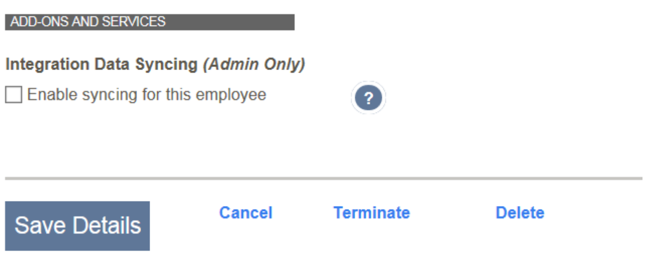
8. In the NetSuite Integration: Step 3 box, check the **Enable syncing between TribeHR and NetSuite** box. While this enables syncing, you confirm syncing for each employee from the employee's page in TribeHR.
9. Click **Continue**.
10. Click **Finish**.

3. Sync an Individual Employee (TribeHR)

Before syncing an individual employee's information from TribeHR to NetSuite, ensure that the entries on the employee profile are accurate. Blank values are valid field entries, so if profiles are incomplete, the blank entries will overwrite your existing NetSuite field entries. If you are not sure which fields are synced, ask your TribeHR Account Manager or submit a ticket to our support services: support@tribehr.com.

To sync an employee:

1. Go to Company > Your Team.
2. Click an employee's name.
3. On their profile page, click **Edit Profile**.



4. Under Add-Ons and Services, check the **Enable syncing for this employee** box.
5. Click **Save Details**.