

Introduction

AbsenceSoft is a Leave Management solution that offers guided workflows, automatic compliance calculations and employee self-service features to simplify the leave management process. This integration transmits eligibility data from isolated to AbsenceSoft. Leave requests are not initiated from isolated, so must be manually entered into AbsenceSoft. The integration utilizes a custom isolated export file delivered via SFTP transmission.

- **Report Title:** AbsenceSoft Eligibility File
- **Report Type:** As Of Date
- **Frequency:** Schedule as Required
- **File Name:** AbsenceSoft_Eligibility_File_MMDDYYYYmmss (date and time the report ran)
- **Output Type:** CSV
- **Report Filter:** Employees with the employment status of "Active," with a description containing the words "LOA" or "leave," and employees terminated within the last 7 days.

and

Employees with an employment category description of "full-time," "full time," "part time," or "part-time."

- **Sort:** Employee Number
- **Include Header:** No

Pre-setup Information

Obtain the following client-specific information:

- Request the Employer Reference Code from AbsenceSoft.
- Identify the earnings for each custom accumulator. Refer to the "Add Custom Accumulators" section on page 2.

AbsenceSoft isolated Integration Setup

Add Employer Reference Code Override Legal Miscellaneous Field

The export automatically sends the isolated Legal Company Code as the AbsenceSoft Employer Reference Code. If another value is required, it can be entered into this field as an override.

1. Navigate to **System Management > Legal Misc Fields**.
2. Verify that an **AbsenceSoft ER Reference Code Override** does not exist.
3. Click on the **Add New** icon.
4. **Field Code:** ABSERC
5. **Field Title:** AbsenceSoft ER Reference Code Override
6. **Data Type:** Text
7. Click on **Save**.

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Add Employer Reference Code Override (if required)

1. Navigate to **Client Management > Client Maintenance > Legal Miscellaneous Fields**.
2. Locate the **AbsenceSoft ER Reference Code Override** field.
3. Enter the value provided by AbsenceSoft.
4. Click on **Save**.

Add Service Date Override Miscellaneous Employee Field:

This export calculates the service date according to AbsenceSoft requirements. However, if an employee has been rehired multiple times, the date may need to be manually calculated. This field is available for clients to add an override service date for specific employees, if needed.

1. Navigate to **Client Management > Tables > Misc Field Categories**.
2. Confirm that a **Leave** category does not already exist.
3. Click on the **Add New** icon.
4. **Category Title:** Leave (or client preference)
5. Click on **Save**.
6. Navigate to **Client Management > Tables > Misc Employee Fields**.
7. Click on the **Add New** icon.
8. **Field Code:** ABSD
9. **Field Title:** AbsenceSoft Service Date Override
10. **Category:** Leave
11. **Display Order:** As Required
12. **Date Type:** Text
Note: The client should be instructed to enter dates in "MM/DD/YYYY" format.
13. Ensure that **Allow Manager Access** is checked.
14. Ensure that **Allow Supervisor Access** is checked.

Add Custom Accumulators

This export requires that two custom date accumulators be set up with the appropriate earnings included. Check with the client and AbsenceSoft to confirm which earnings fall into the below categories.

- Hours Worked within 12 Months
- Hours Worked within 12 Months including Paid Leave

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Use the following steps to add the accumulators.

1. Navigate to **Client Management > Payroll > Accumulators**.
2. Add the "Hours Worked within 12 Months" accumulator.
 - a. Click on the **Add New** icon.
 - b. **Accumulator Type:** Custom
 - c. **Accumulator Title:** AbsenceSoft 12MoHours
 - d. **Accumulator Code:** EHW
 - e. Ensure that **Allow Earnings** is checked.
 - f. Select the appropriate **Earnings**.
 - g. Click on the **Save** icon.
3. Add the "Hours Worked within 12 Months including Paid Leave" accumulator.
 - a. Click on the **Add New** icon.
 - b. **Accumulator Type:** Custom
 - c. **Accumulator Title:** AbsenceSoft 12MoHours+PTO
 - d. **Accumulator Code:** ALHW
 - e. Ensure that **Allow Earnings** is checked.
 - f. Select the appropriate **Earnings**.
 - g. Click on the **Save** icon.

Check if a Department Labor Field Exists

The export file has an optional field for "Department" that pulls a value from an isolved labor field named "Department." If that field does not exist, the "Department" field in the file will be blank. If the client and AbsenceSoft wish to have this field included in the file, the isolved "Department" labor field with values must exist and be assigned to each employee.

1. Navigate to **Client Management > Client Maintenance > Organizations**.
2. Click the **Labor Fields** tab.
3. Check that a field with "Department" as the title exists.
4. If one exists, navigate to **Client Management > Tables > Organization Table**.
Note: If the "Department" labor field does not exist, you or the CSR can add this with the client's approval.
5. Select the **Department**.
6. Verify that values exist for this field.

Help Docs

Set up Data Transmissions

AbsenceSoft provides SFTP for both “Staging” (test) and “Production.” Each payroll company has their own SFTP credentials. To make client configuration simpler, the data transmission is set up at the system level and enabled for client transmission. The client data transmission URL is then edited for each client to produce the correct file name.

Add the below system-level data transmissions if they do not already exist. Navigate to **Production Utilities > Data Transmission Settings**. For network partners, the URL provided to you by AbsenceSoft should be used for all URL setups. Instances of “isoloved” in the URL should be replaced with your company name.

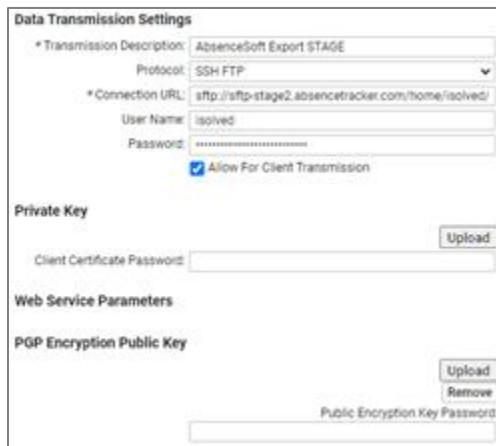
AbsenceSoft Staging Data Transmission

1. Click on the **Add New** icon.
2. **Transmission Description:** AbsenceSoft Export STAGE
3. **Protocol:** SSH FTP
4. **Connection URL:**

sftp://sftp-stage2.absencetracker.com/home/isoloved/incoming/[filename].csv.pgp

Note: Leave the placeholder [filename] in the URL. This will be edited at the client level in the next step.

5. **User Name:** Provided by AbsenceSoft
6. **Password:** Provided by AbsenceSoft
7. **PGP Encryption Public Key:** Provided by AbsenceSoft
8. Click on the **Save** icon.



Help Docs

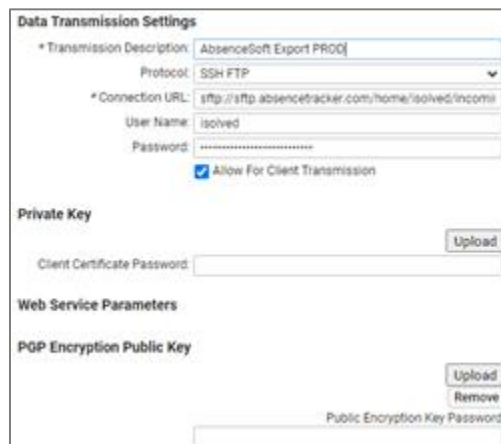
AbsenceSoft Production Data Transmission:

1. Click on the **Add New** icon.
2. **Transmission Description:** AbsenceSoft Export PROD
3. **Protocol:** SSH FTP
4. **Connection URL:**

sftp://sftp.absencetracker.com/home/isolved/incoming/[filename].csv.pgp

Note: Leave the placeholder [filename] in the URL. This will be edited at the client level in the next step.

5. **User Name:** Provided by AbsenceSoft
6. **Password:** Provided by AbsenceSoft
7. **PGP Encryption Public Key:** Provided by AbsenceSoft
8. Click on **Save**.



Set up Client Data Transmissions

The client-level data transmissions are set up using the system data transmissions with overrides enabled and the URL edited to include the specific client's filename. Navigate to **Client Management > Client Utilities > Transmissions > Data Transmission Settings**.

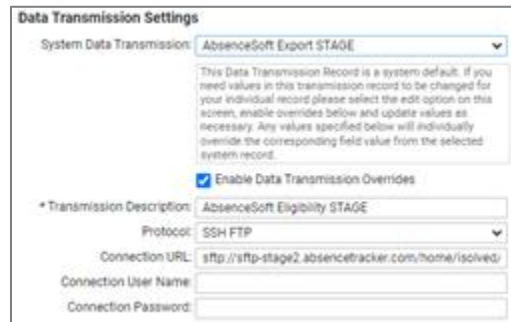
AbsenceSoft Staging Client Data Transmission:

1. Click on the **Add New** icon.
2. **System Data Transmission:** Select "AbsenceSoft Export STAGE"
3. **Enable Data Transmission Overrides:** Yes
4. **Transmission Description:** AbsenceSoft Eligibility STAGE
5. **Connection URL:**

sftp://sftp-stage2.absencetracker.com/home/isolved/incoming/[CompanyID]_[CompanyName]_AbsenceSoft_{1:MMddyyyy}.csv.pgp

Note: For isolved direct clients, the "CompanyID" is the NetSuite Customer ID. Network Partners can use the isolved Client ID.

- Click on the **Save** icon.



Data Transmission Settings

System Data Transmission: AbsenceSoft Export STAGE

This Data Transmission Record is a system default. If you need values in this transmission record to be changed for your individual record please select the edit option on this screen, enable overrides below and update values as necessary. Any values specified below will individually override the corresponding field value from the selected system record.

☒ Enable Data Transmission Overrides

* Transmission Description: AbsenceSoft Eligibility STAGE

Protocol: SSH FTP

Connection URL: sftp://sftp-stage2.absencetracker.com/home/isolved/

Connection User Name:

Connection Password:

No other transmission overrides are required.

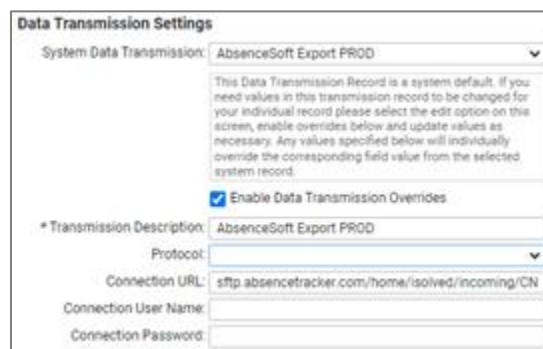
AbsenceSoft Production Client Data Transmission:

- Click on the **Add New** icon.
- System Data Transmission:** Select "AbsenceSoft Export PROD"
- Enable Data Transmission Overrides:** Yes
- Transmission Description:** AbsenceSoft Eligibility PROD
- Connection URL:

*sftp://sftp.absencetracker.com/home/isolved/incoming/
[CompanyID]_[CompanyName]_AbsenceSoft_{1:MMddyyyy}.csv.pgp*

Note: For isolated direct clients, the "CompanyID" is the NetSuite Customer ID. Network Partners can use the isolated Client ID.

- Click on the **Save** icon.



Data Transmission Settings

System Data Transmission: AbsenceSoft Export PROD

This Data Transmission Record is a system default. If you need values in this transmission record to be changed for your individual record please select the edit option on this screen, enable overrides below and update values as necessary. Any values specified below will individually override the corresponding field value from the selected system record.

☒ Enable Data Transmission Overrides

* Transmission Description: AbsenceSoft Export PROD

Protocol:

Connection URL: sftp.absencetracker.com/home/isolved/incoming/CN

Connection User Name:

Connection Password:

No other transmission overrides are required.

Help Docs

Set up Scheduled Transmission

Only one scheduled transmission is required. You can set it up initially to send a test file to staging. Once that is confirmed, you can change the transmission settings to production. Navigate to **Client Management > Client Utilities > Transmissions > Scheduled Transmissions**.

AbsenceSoft Eligibility Export

1. Click on the **Add New** icon.
2. Select the **Report Item** radio button.
3. Select "AbsenceSoft Eligibility File" from the drop-down menu.
4. **Schedule Description:** AbsenceSoft Eligibility Export
5. **Transmission Description:** Create Weekly On – Wednesday
6. **At This Time:** 6:00 AM
7. **Transmission Settings:** AbsenceSoft Eligibility STAGE (or PROD)
8. **Format:** Excel

The screenshot shows a 'Scheduled Report' configuration form. At the top, 'Report Title' is set to 'AbsenceSoft Eligibility File' and '* Schedule Description' is 'AbsenceSoft Eligibility Export'. Under the 'Transmission Schedule' section, 'Create Weekly On' is selected with a radio button, and the day is set to 'Wednesday' in a dropdown menu. Below this, there is an unchecked 'Create Monthly On The' option with a dropdown menu. The '* At This Time' is set to '6:00 AM' in a dropdown menu. Finally, 'Transmission Settings' is set to 'AbsenceSoft Export PROD' in a dropdown menu. A small blue information icon is visible next to the monthly schedule dropdown.

Refresh System Data:

Navigate to **Production Utilities > Refresh System Data** and click on the **Refresh** button.

Notify AbsenceSoft that Setup is Complete

Email the AbsenceSoft contact to inform them that setup is complete. Coordinate sending a test file, if required.

AbsenceSoft Contact

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Integration Specifications

- **Integration Type:** Multi-client – available to any client
- **Solution Name:** AbsenceSoft
- **Vendor Name:** AbsenceSoft
- **Solution Category:** Leave Management
- **Network Partners Billable or Non-Billable:** Non-Billable
- **SFTP/API:** SFTP Data Transmission – Outbound
- **180/360 and Direction:** 180 from isolated to AbsenceSoft
- **Description of Data Exchanged:** Employee demographics, hours, job
- **How Activated:** Client "As of Date" export sent via SFTP
- **Partner User Category:** N/A
- **Partner Username:** N/A
- **Go Live Date:** 11/30/23