Deputy integration

SmoothPay Payroll provides built-in support for importing attendance and leave data direct from Deputy (deputy.com) via it's API, as well as updating staff records in either direction (*from Deputy to SmoothPay and vice versa*).

The Deputy::SmoothPay integration

Choose File..Import..Timesheet..Deputy:

Example of Deputy integration utility

This will open the Deputy dialog which provides access to the timesheet importer and other integration options.

In order for SmoothPay to talk to Deputy you need to establish a **permanent access token** in Deputy and enter that value into SmoothPay.

Select *Configure*, then click the *Token setup demo* link to see how to acquire a permanent access token of SmoothPay.

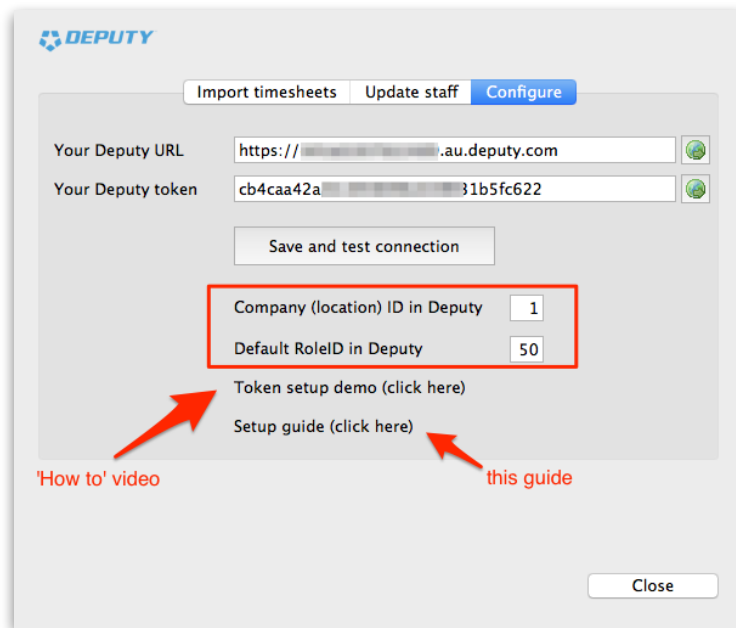The following section describes the Configure process.

Configuration

Log on to your domain at Deputy, then alter the URL to go to a special OAuth page where you can set up your SmoothPay integration and obtain a long term token.
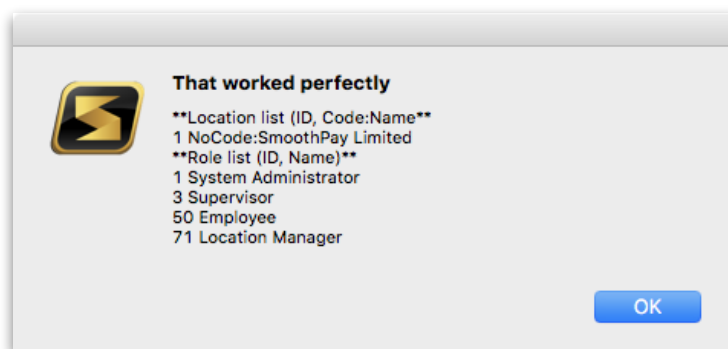

1. change the url to <yourdomain>.deputy.com/**exec/devapp/oauth_clients**
2. add a New OAuth Client
3. enter **SmoothPay** as the client name
4. enter **http://localhost** as the Redirect URI
5. Click Get An Access Token

Copy the Access Token (highlight the token then CTRL+C or right-click and choose Copy)

In SmoothPay go to *Import..Timeclock..Deputy..Configure* and paste (Edit..Paste or CTRL+V) in the

The *Save and Test* button will check your settings and display your location list and roles:

Set the defaults for adding new employees direct from SmoothPay correctly - in the example we've set Company (location) ID to 1, and Default RoleID to 50 (an employee).

To send new staff records to Deputy you *MUST* have a badge number assigned in their Contract tab.

To receive new staff records from Deputy you *MUST* set a Timesheet Export Code in the employee's Pay Rates record (in Deputy).

Importing timesheet data

Choose **Import Timesheets** to import the Timesheet Data and create Time Input entries.
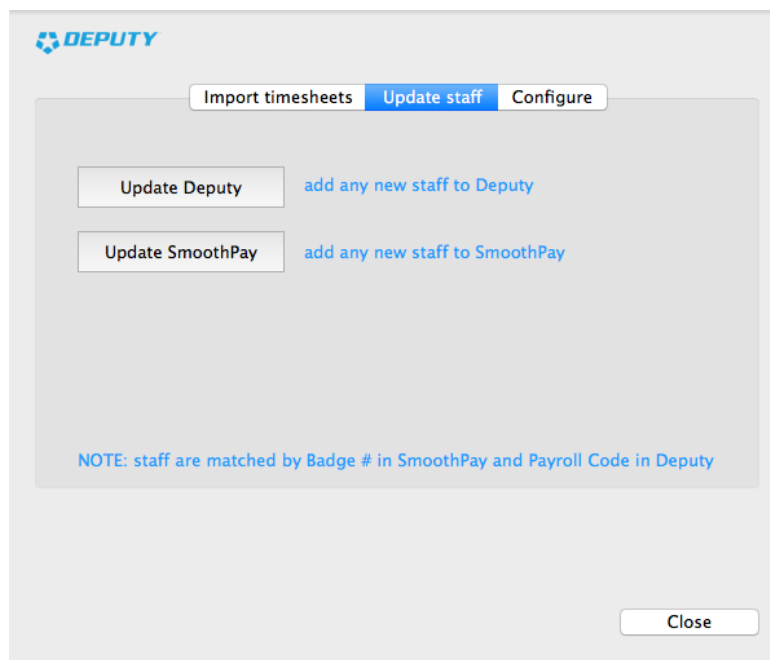
A spreadsheet containing the entries retrieved from Deputy will be created automatically.

Data Import Notes:

- **Badge #:** Imported data will be matched against an Employee's *Badge Number*. This *Badge Number* must match the Deputy *Employee Payroll Code*. *Badge Numbers* are established in SmoothPay's *Contract* Setup page, Employee Payroll Codes are established in Deputy's People..Pay Rates tab.

- **Standard Allowances and Payments (permanent deductions), including Bank Account entries,** should form part of the Employee's Standard Pay entries rather than entries imported each time from Deputy (*this is especially important for deductions payable to other agencies, as SmoothPay may be monitoring the balance due*).

Adding employee (bi-directional)

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*).

Notes

Deputy is ideal as your roster planning and leave scheduling tool.

Scheduled leave entered in Deputy 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 Number (Contract tab)*. This *Badge Number* is the same as the Deputy *Employee Payroll Code.*

All time is considered correct including any meal-breaks defined in Deputy already deducted from imported time. Unless a leave entry is detected then all time is considered to be ordinary time, and is subject to any meal-break, rounding and auto-overtime rules you might have defined globally or per employee.

NZ Users: Deputy 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 Deputy 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.
  - We can handle this differently if a specific leave code is used that tells SmoothPay to regard the entry as being days, rather than hours - this requires careful management though as the "hours" entered are actually "days" (e.g. "SLD" could be configured to regard the entry as being in days and would be paid at average daily pay rates, whereas "SLH" would be regarded as sick leave in hours and treated as being 1 day (*same problem as Deputy doesn't cater for extra meta-data that could identify the proportion of a day*))
- **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 Deputy, it may be that leave isn't recorded in Deputy, just time worked. You are required to accurately record days paid every period to maintain the accuracy of average daily pay calculations. Some sources provide a DAYS value in the dataset, otherwise the employee's contract default value is used (*5 days by default, but able to be tailored per employee*)

Leave for other countries will be processed according to rules applicable to the leave code used (*e.g. T4, AL or ALH will process leave in hours, ALD will multiply the units by the employee's daily hours and pay rate and set the number of days consumed to the units provided.*)

There is no provision for payment of special allowances or deductions, nor any facility to cater for additional cost analysis (*job codes, activity codes etc.*) other than the basic operational unit in Deputy.

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

Alias paycodes

Alias paycodes are used to map units represented a certain way to (typically) a leave code that uses different units in payroll.

For example, NZ law requires annual leave to be represented in weeks. A code **ALH** will map units provided in hours to weeks in SmoothPay by calculating the value of those hours at the employee's hourly rate and determines from that what proportion that value is of the best of ordinary weekly earnings, average weekly earnings, agreed weekly value.

So, rather than using the "ANNUAL" code defined in SmoothPay, use ALH instead if you want to render annual leave taken in hours in your attendance system.

Assuming these leave alias-codes are <u>being used in Deputy</u> they'll work as follows:

AL or ALH=Annual leave (hours)	Portion of week determined from $value (NZ) otherwise hours x rate
ALD=Annual leave in days	Portion of week and value determined from employee's days per week (NZ)
ALW=Annual leave in weeks	Pays best weekly rate (NZ)
BL or BLH=Bereavement Leave (hours)	Pays units @ payrate (NZ: guesses 1 day format does not provide days used)
BLD=Bereavement Leave (days)	Pays units @ average daily pay (NZ)
PTH or 99=Public taken (hours)	Pays units @ payrate (NZ: guesses 1 day format does not provide days used)
PTD=Public taken in days	Pays units @ average daily pay (NZ) otherwise hours x rate
PWH=Public worked (hours)	Pays hours at penal rate (NZ) otherwise hours x rate
SL or SLH=Sick Leave (hours)	Guesses 1 day (NZ: format does not provide days used)
SLD=Sick leave in days	Pays units @ average daily pay (NZ) otherwise units x hours per day x rate
ALT=Consume Alternative day/s	Alternative days consumed
ALTH=ALT in hours	Pays units @ payrate (NZ: guesses 1 day format does not provide days used)
ACC=1st week ACC hours	ACC hours paid
UPL=Unpaid leave	Unpaid leave

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.