# TriNet + Integration User Guide

## Overview

The integration between TriNet and Electric allows you to manage your company IT assets by keeping employee information on the Electric platform up to date. It also allows you to use TriNet credentials to access the Electric platform.

Employee Data

Single Sign-On

**Data Sync**

The synchronization of employee information between TriNet and Electric allows you to view your entire company roster in Electric and also manage their asset assignments.

With the integration enabled, all employees will be loaded into Electric as follows:

1. All newly hired employees will be added to Electric on a hire date.
2. All terminations in TriNet will be reflected in Electric once the termination has been fully processed in TriNet.
3. The following information will be shared between the systems for each of your employees:
   a. Name
   b. Home Address
   c. Job Title
   d. Work Email
   e. Home Email
   f. Home Phone Number
   g. Work Phone Number
   h. Home Department
   i. Employee Roles
   (Both employees and trusted advisors will be synced with Electric.)
4. Once the employees are added to the Electric platform, the following events will be tracked in TriNet and will be reflected in Electric:
   a. Termination
   b. Job Title Change
   c. Name Change
   d. Home Address Change
   e. Work Contact Information (email, phone) Change
   f. Home Contact (email) Change

## Single Sign-On

Upon configuration of the integration, single sign-on between TriNet and Electric will be enabled to allow your HR Authorizer role holders to launch Electric directly from the TriNet platform and automatically log in.
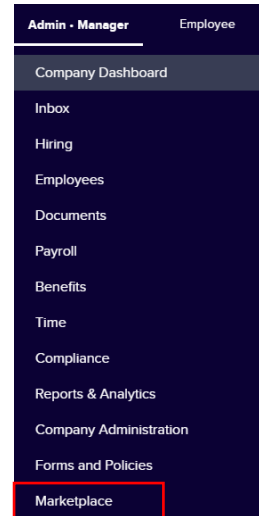
In this scenario:

1. TriNet serves as an Identity Provider.
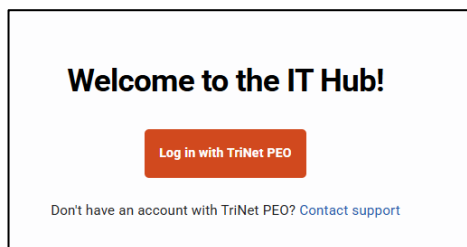2. Electric serves as a Service Provider.

# Section 1: Set up Integration with Electric
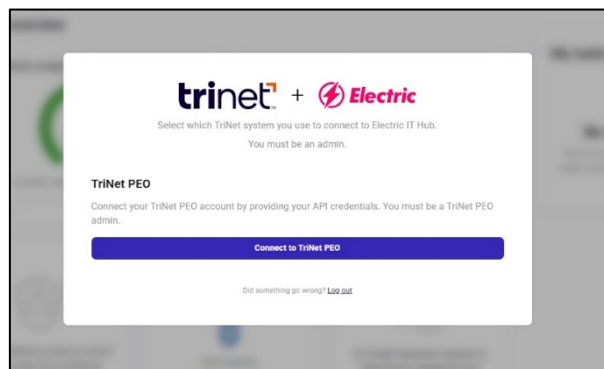
## Step 1: Sign up for a free Electric HR plan.

- Click on **Marketplace** in the navigation menu.

| Admin · Manager | Employee |
|---|---|
| **Company Dashboard** | |
| Inbox | |
| Hiring | |
| Employees | |
| Documents | |
| Payroll | |
| Benefits | |
| Time | |
| Compliance | |
| Reports & Analytics | |
| Company Administration | |
| Forms and Policies | |
| Marketplace | |

- Under **All Apps**, search for the **Electric** card and click **Sign Up**.
  **(Note**: If you already have an Electric account, please proceed to Step 2 of these instructions.)
- You will be redirected to the Electric sign up form. Please enter the required information and follow the instructions on the form.
  **Note:** The form should be completed using the work email address associated with your TriNet profile.
- After completing the form, select the option to log into Electric with TriNet (You will not be prompted to enter login credentials):
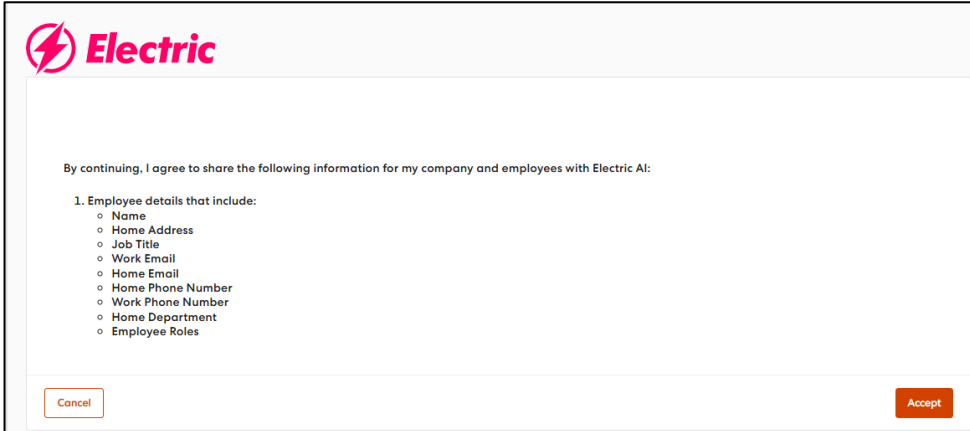
**Welcome to the IT Hub!**

Log in with TriNet PEO

Don't have an account with TriNet PEO? Contact support

- When logged in, you will not be able to use the system until you configure the integration:

trinet + ⚡ Electric

Select which TriNet system you use to connect to Electric IT Hub.
You must be an admin.

**TriNet PEO**

Connect your TriNet PEO account by providing your API credentials. You must be a TriNet PEO admin.

Connect to TriNet PEO

Did something go wrong? Log out

## Step 2: Configure the Integration in TriNet

- Back in TriNet Marketplace on the Electric card, click **Set up Integration**.
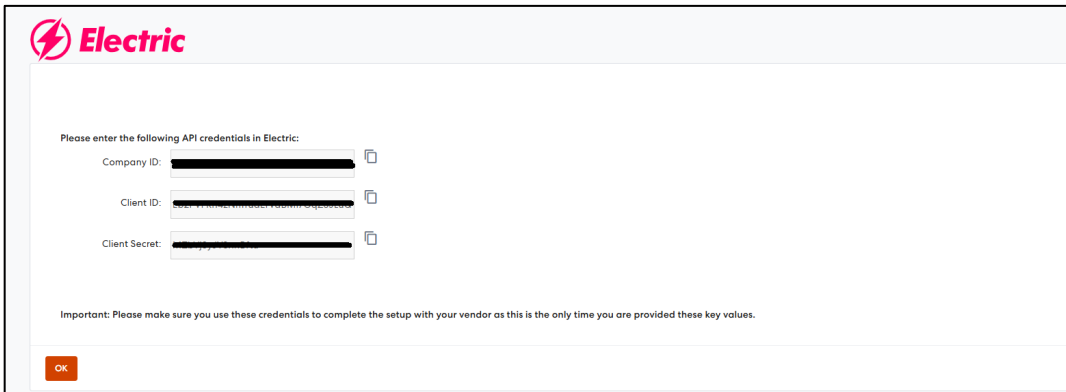- The screen below with the list of information being shared will display. Click **Accept**.



- The access keys are now generated. This is the **only** time you will see the access keys. It is NOT recommended to store them on your computer. Instead, please go to the Electric platform in another tab to complete the integration setup.
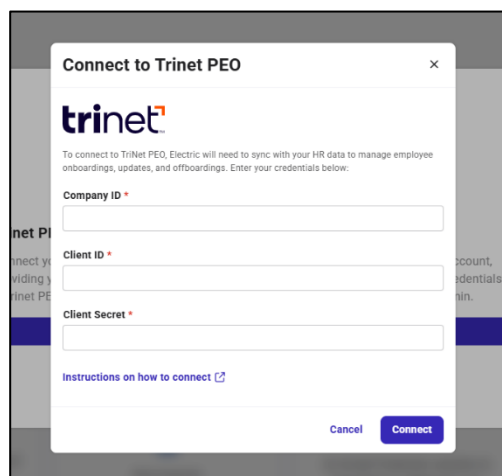
## Step 3a: Configure the Integration in Electric – Free Plan

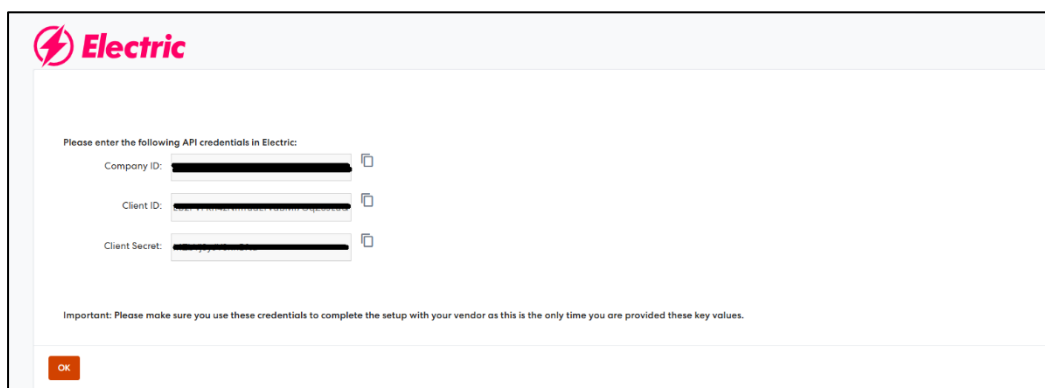Back in Electric, to continue the company setup:

- Click **Connect to TriNet PEO**.
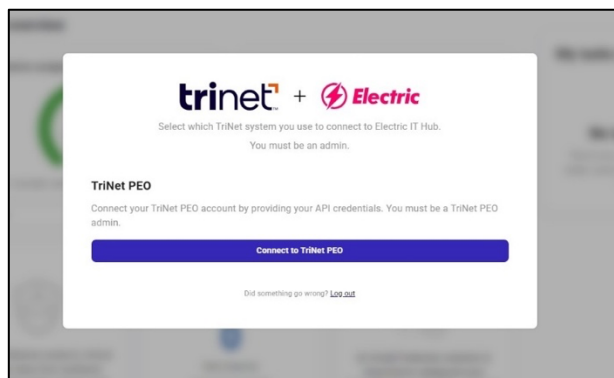


- Copy/Paste the credentials from TriNet Marketplace and click **Connect**.
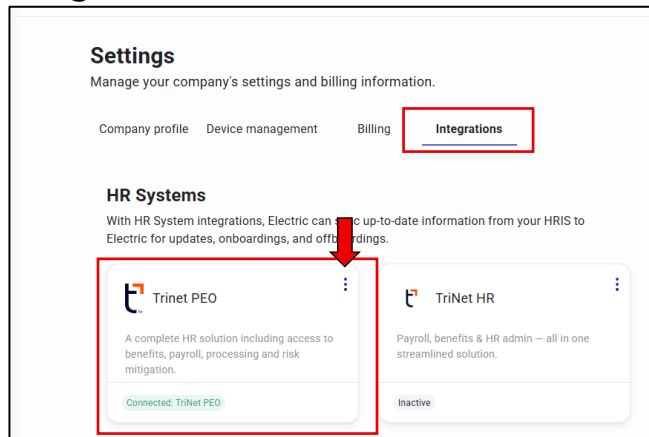


- Now you can complete the integration on the TriNet side by clicking **OK** on the screen below.
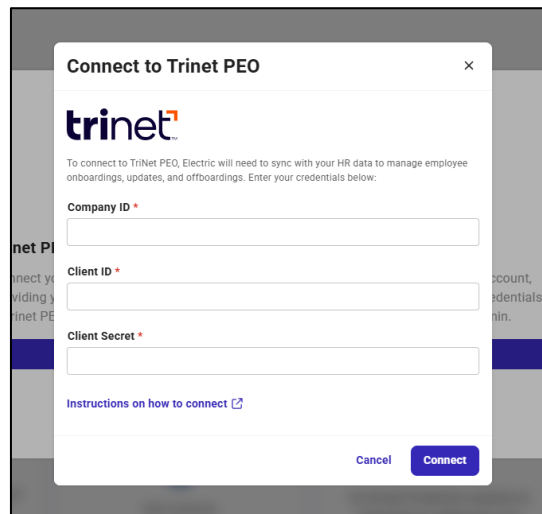


The Electric app will now be available under the **My Connected Apps** section.

## Step 3b: Configure the Integration in Electric – Paid Plans

- Log into Electric as a company administrator and locate **TriNet PEO** in the **Settings> Integrations** section:



- Click on ⋮ and select **Connect Integration.**
- Copy/Paste the credentials from the TriNet Marketplace and click **Connect**.



- The integration is now enabled.
- Now you can complete the integration on the TriNet side by clicking **OK** on the screen below.
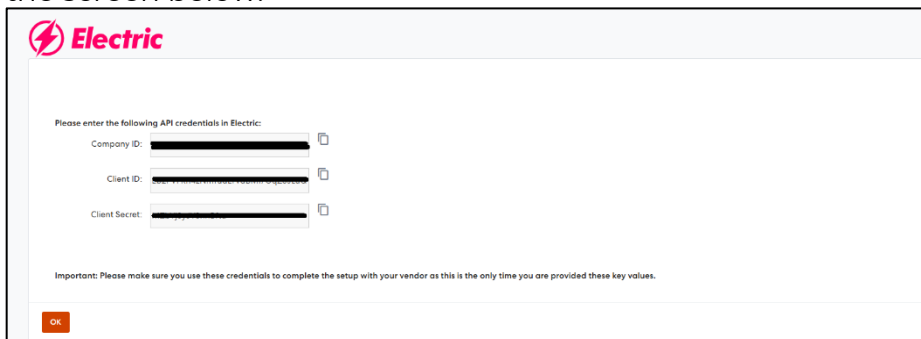


The Electric app will now be available under the **My Connected Apps** section.

# Section 2: SSO to Electric

Enabling the integration adds an "IT Management" option for all HR Authorizer role holders within the TriNet platform which can be used to access Electric directly. An HR Authorizer must also be set up as an administrator in Electric to utilize this feature, and it is your responsibility to assign this role within Electric.

Access to Electric will be visible as "**IT Management**" in:

1. Company Dashboard > Quick Links section:
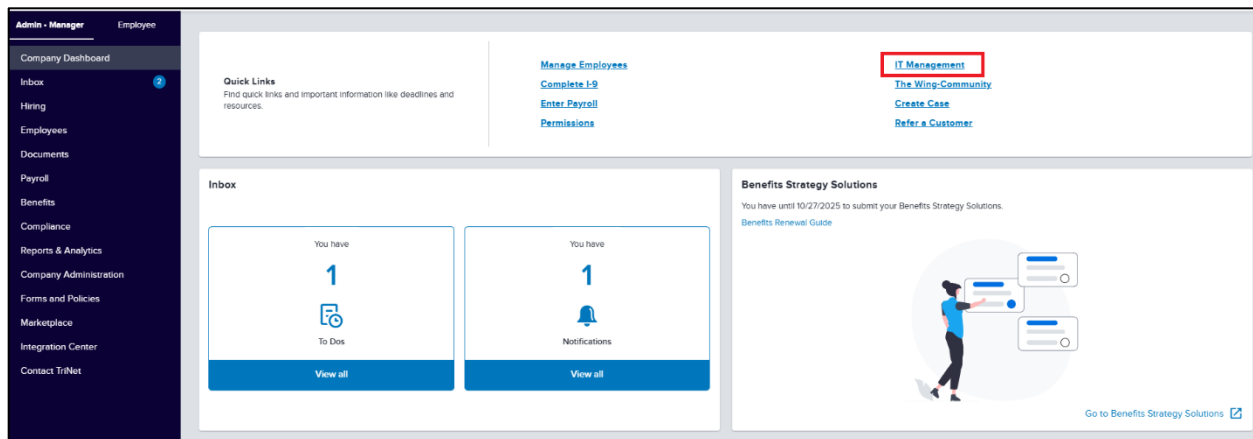


2. Hiring Menu:
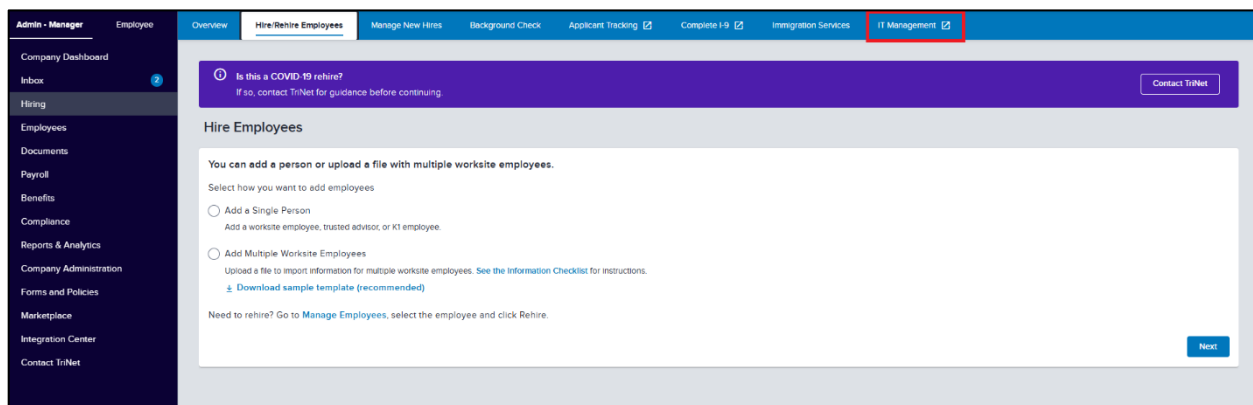
# Section 3: Disconnecting the Integration

Disconnecting the integration will stop both:

- Data Integration
- Single Sign-On Logic

**To properly disconnect the integration and avoid any errors, please disconnect in the following order:**

1. Electric
2. TriNet

## Disconnect in Electric

In Electric, locate the TriNet integration in **Settings/Integrations** and click **Disconnect**.

The data synchronization is now stopped, **but it is important to disconnect the integration on the TriNet side as well**.

## Disconnect in TriNet

In Marketplace under **My Connected Apps**, locate the Electric app and click **Disconnect.**

It is important to disconnect in TriNet as well so the API access keys are removed and can no longer be used.