

Deltek Costpoint® 7.1.1 HRsmart Integration

Release Notes

August 14, 2015

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Overview

Welcome to Deltek Costpoint 7.1.1 HRsmart Integration Release Notes. These release notes contain a summary of the following:

- Major New Features
- Integration Overview
- Integration Implementation

Pre-Installation Information

Minimum System Requirements

This Deltek Costpoint 7.1.1 HRsmart Integration release supports the following software:

- **Costpoint**
 - Costpoint 7.1.1 (required)
 - HRsmart Integration Hotfixes (required)
- **HRsmart**

For Additional Information

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Customer Care Connect site provides:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes



For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to <http://support.deltek.com>.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In**.



If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Costpoint 7.1.1 HRsmart Integration Overview

Costpoint 7.1.1 HRsmart Integration is a bi-directional integration that results in the ability to create employee data in Costpoint for new hires recently on-boarded within HRsmart Applicant Tracking. The integration can perform the import/export process through the Transfer HRsmart Data screen in the Employee domain. The Integration can be executed on demand or you can schedule to run the process at a certain time.

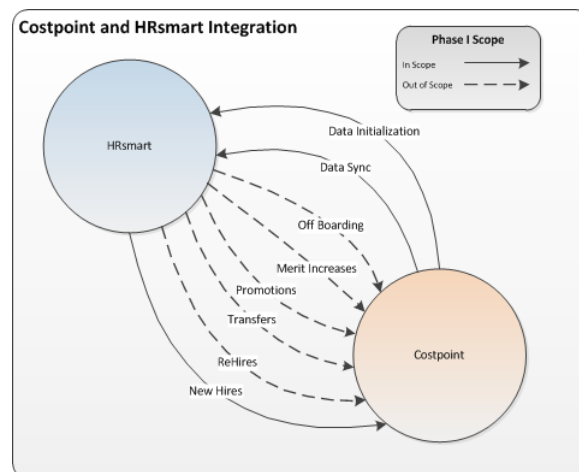
From Costpoint to HRsmart, the following data is included in integration:

Costpoint	HRsmart	Notes
Employees	Users	Provides HRsmart user records for existing employees in Costpoint. This will grant all users access to the HRsmart suite of products.
Detail Job Titles	Job Profiles	Provides HRsmart with skeleton Job Profiles. Note that Detail Job Titles is only available for integration if Costpoint HR is licensed.
Organizations	Org Levels	Provides HRsmart with both Costpoint Company and Organization structure.
Job Templates	CP Job Templates	Job Templates is an optional feature that provides preset defaults of Costpoint data. New hires can be associated to a Job Template in HRsmart. The integration will receive the new hire data along with the associated Job Template and utilize the Job Template to drive the defaulting of numerous CP fields not collected in HRsmart.



Based on integration options, the integration can be used to provide data initialization from Costpoint to HRsmart or a synchronization based on what has changed in Costpoint since last time it was executed.

From HRsmart to Costpoint, the integration currently only supports creation of new hires in Costpoint. Future capability for rehires, transfers, off boarding, and promotions\merit increases is planned. The diagram below gives an overview of the integration:



Data Mapping and Troubleshooting

For information about the mapping of data between Costpoint and HRsmart, you can refer to the *Deltek Costpoint 7.1.1 HRsmart Integration Technical Guide*. This guide provides field-level data mapping information that the integration uses.

If you encounter any issues while transferring data, you can view the log files and error files created by the integration process and use the information for troubleshooting. The steps for viewing these files are discussed in the “Integration Troubleshooting” section of the *Deltek Costpoint 7.1.1 HRsmart Integration Technical Guide*.

Costpoint 7.1.1 Enhancements

To support this integration, the following changes were applied to Costpoint 7.1.1 screens:

Configure Personnel Settings (HPMSET)

- Changed group box label from "Position Requisitions" to "Job Templates"
- Changed field label from "Requisition Numbering Method" to "Job Template Numbering Method"

Manage Job Templates (HPMREQR)

- Updated application name from "Manage Position Requisition Requests" to "Manage Job Templates"
- Move the application to the **People » Employee » Employee Controls** menu
- Changed license from Human Resources to a core application
- Changed menu location so that the application can be accessed by non-HR clients
- Data Dictionary: Change Module from 'HP' to 'EM' for data dictionary reporting purposes
- HR fields are not available on the screen if the client is not licensed for Costpoint HR
- Reconfigured screen to accommodate non-HR clients
- Updated field specifications and validations to accommodate change in application name and non-HR users

Manage Job Templates Database Patch

Costpoint 7.1.1 PATCH2652 includes the following changes to Manage Job Templates table for HRsmart Integration:

- Database: Change H_POS_RQ_RQST.dctl_job_cd to NULLS-Yes
- Database: Change H_POS_RQ_RQST.rq_dt to NULLS-Yes
- Database: Change H_POS_RQ_RQST.rq_empl_id to NULLS-Yes

Manage Employee Information (LDMEINFO)

Updated the defaulting logic for fields that currently have a corresponding field in the Manage Job Templates screen.

Main Screen – Employee Info tab

- Header
 - Contractor flag
- Employee Information
 - Eligible for Auto-Pay
 - Locator Code
 - Leave Cycle

- Supervisor Name
- Taxable Entity
- Timesheet Cycle
- Union Employee
- Product Interfaces
 - Badge Group
 - Badge ID
 - Manufacturing Order Clocking
 - Applies to Manufacturing Execution
 - Plant
 - Applies to Shop Floor Time
- Timesheet Defaults
 - Account
 - Organization
 - GLC
 - Labor Location
 - Pay Type
 - Project ID
 - Reference 1
 - Reference 2
- Workers' Compensation Code

Salary Details subtask (LDMEINFO and LDMEHIS)



This update applies to Salary Details subtasks on both Manage Employee Information screen and Manage Salary Information screens.

- Salary Info tab
 - PLC
 - Detail Job Title
 - Rate Group
 - Employee Class
 - FLSA Classification
 - GLC
 - Home Reference 1
 - Home Reference 2
 - HR Organization
 - Labor Group

- Labor Location
- Home Organization
- Personnel Action 1
- Seasonal Employee
- Security Organization
- Employee Type
- Rate Type
- Time Collection Timesheet Schedule
- Work Schedule
- Currency
- Work State
- Work Hours in Year
- HR Information tab
 - Affirmative Action Plan
 - Compensation Plan
 - Effective Date is Hire Date
 - Job Group
 - Review Form
 - Grade
 - Step

Taxes subtask (LDMEINFO & PRMETAX)



This update applies to the Taxes subtasks on both Manage Employee Information screen and Manage Employee Taxes screens.

- Taxes tab
 - Pay Cycle

Manage Employee Information (LDMEINFO)/View Employee Information (PRQEINFO) Database Patch

Costpoint 7.1.1 PATCH2650 includes hidden field for **Date of Last Export** to HRsmart (HRSMART_EXPORT_DT) to EMPL and EMPL_ADT tables.

Transfer HRsmart Data (EMPHRSDAT)

A new screen, Transfer HRsmart Data, was created in Costpoint to allow you to set up the data that will be imported and exported between Costpoint and HRsmart. You may include the following data in the integration:

Import to Costpoint

- New employee records from HRsmart

Export to HRsmart

- Costpoint employee records
- Costpoint organization records
- Costpoint detail job titles
- Costpoint job templates

Transfer SilkRoad Data (LDPSRDAT)

Changed label of Position Requisitions to "Job Templates"

Application JAR Requirements

The following table shows the required application JAR version for each screen affected by this update:

Domain	Application Name	Application JAR
PE	Configure Personnel Settings (HPMSET)	cp711_hpmset_001.jar
PE	Manage Position Requisition Request (HPMREQR)	cp711_hpmreqr_004.jar
PE	Manage Employee Information (LDMEINFO)	cp711_ldmeinfo_005.jar
PE	View Employee Information (PRQEINFO)	cp711_prqeinfo_002.jar
PE	Transfer HRsmart Data (EMPHRSDAT)	cp711_emphrsdat_001.jar
PE	Transfer SilkRoad Data (LDPSRDAT)	cp711_ldpsrdat_003.jar

Known Issues

This section includes summaries of issues that exist in Costpoint 7.1.1 HRsmart Integration. These issues will be resolved in future updates.

Some descriptions of software defects contain extra information which includes ways to work around the defects.

Fatal Error When Database was not Linked to HRsmart

Description: A fatal error occurred when you ran the integration process if the database was not linked to the HRsmart system.

Customers Impacted: This defect affects Costpoint - HRsmart Integration users.

Workaround Before Fix: None.

Additional Notes: None.

Incorrect GLC of Imported Employees with Job Templates

Description: When you imported employee data while the **Allow edit of timesheet GLC** check box on the Configure Labor Settings screen was selected, the GENL_LAB_CAT_CD values of imported employees with job templates were always equal to the first GENL_LAB_CAT_CD value on the GENL_LAB_CAT table.

Customers Impacted: This defect affects Costpoint - HRsmart integration users.

Workaround Before Fix: None.

Additional Notes: None.

Costpoint 7.1.1 HRsmart Integration Implementation


This section lists the steps that you need to perform in order to allow the transfer of information between Costpoint and HRsmart.



Before performing the steps in this topic, you must first ensure that the connection settings between Costpoint and HRsmart are properly set up. For more information, please refer to the *Costpoint 7.1.1 HRsmart Integration Technical Guide*.

To allow the transfer of information between Costpoint and HRsmart, you will need to complete the following steps:

1. Create or update organizations in Costpoint (**Accounting » General Ledger » Organizations » Manage Organization Elements**).
2. Create or update Detail Job Titles (**People » Compensation » Job Titles » Manage Detail Job Titles**). This is an **optional** step and only applies if you are licensed for Costpoint HR.
3. Create or update Detail Position Descriptions (**People » Compensation » Job Titles » Manage Detail Position Descriptions**). This is an **optional** step and you may want to maintain the detail descriptions in HRsmart instead.
4. Create or update Job Templates (**People » Personnel » Position Requisitions » Manage Job Templates**). All requisitions/job templates are exported in HRsmart. This is an **optional** step; however, it provides more intelligent defaults for Costpoint data attributes for new hires.
5. Make sure that employees in Costpoint have values on the following fields. These fields are required fields in HRsmart.
 - Work email address
 - Home email address
6. To include human resources (HR) representative data in the integration, complete the following steps: (Optional). This is for the approvers in HRsmart.
 - Go to the Configure Personnel Settings screen (**People » Personnel » Personnel Controls**) and select your **Manager Defaulting Method** which can be either **By Company-wide Organization** or **By HR Organization**.
 - Assign managers/HR representatives to company-wide organizations or HR organizations in one of the following screens in the Personnel Controls menu (**People » Personnel » Personnel Controls**):
 - If your **Manager Defaulting Method** is **By Company-wide Organization**, use the Manage Managers/HR Reps by Organization screen.
 - If your **Manager Defaulting Method** is **By HR Organization**, use the Manage Managers/HR Reps by HR Organization screen.
7. Go to the Transfer HRsmart Data screen (**People » Employee » Employee Interfaces**) and select the type of data to be included in the integration.



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