


# Deltek Costpoint®

Version 7.1.1 Preprocessor

A large, abstract graphic composed of several overlapping, semi-transparent blue polygons. The shapes are arranged to create a sense of depth and movement, with some areas appearing more solid than others. The colors range from a light sky blue to a deeper cerulean blue.

**June 30, 2016**

A blue geometric graphic consisting of several overlapping triangles and polygons, located in the top-left corner of the page.

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## **TRANSFER SILKROAD DATA**

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## TRANSFER SILKROAD DATA

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Use this screen to import and export information between Costpoint and SilkRoad. Before you run the import and/or export process, use the options on this screen to select the type of information that will be included in the integration.

This is a separately licensed product for the current release of Deltek Costpoint.

### Location

- ☐ People
- ☐ Employee
- ☐ Employee Interfaces

### Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using Query.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. You can change any of the associated selection defaults as necessary.

### Parameter ID

Enter, or click  to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

You can use the parameter to produce reports and run processes more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display in the screen, you can override the defaults.

### Description

Enter, or click  to select, a parameter description of up to 30 alphanumeric characters.

### General

#### Home Address same as Mailing Address

Select this check box if you use the same address for both the mailing and home address of the employee. The integration process will apply the following when you select this check box:

- ☒ **Costpoint to SilkRoad integration** - Costpoint mailing address will be assigned as SilkRoad mailing and home address. Costpoint work address will be assigned as SilkRoad work address.
- ☒ **SilkRoad to Costpoint integration** - SilkRoad home address will be assigned as Costpoint home address. SilkRoad work address will be assigned as Costpoint work address.

### Import

#### New Employees

Select this check box to import new employees from SilkRoad. If you select this check box, the **Employees** check box in the **Export** group box must also be selected.

New hires will not be considered as employees until you export them back to SilkRoad. Therefore, if you import a new employee, you need to immediately export the employee data back to SilkRoad.

## Export

### Changes since last export

Select this check box to include only changes since the last export. If this check box is not selected, a full export of the selected Costpoint values (Employees, Organizations/HR Organizations, Jobs, Labor Locations, Requisitions) will be exported.

### Employees

Select this check box to include employees in the export to SilkRoad. If you select the **New Employees** check box in the **Import** group box, you must also select this check box.

New hires will not be considered as employees until they exported back to SilkRoad. Therefore, if you import a new employee, you need to immediately export the employee data back to SilkRoad.

If you select the **Changes since last export** check box, the process includes only the employees with changes since the last time the export ran.


The export process includes only employees with hire dates that are less than or equal to the system date. These are considered active employees in SilkRoad.

### Exclude Employees with Termination Dates before <date>

Select this check box to exclude employees that have a termination date prior to the date you specify on the date field. This field is active only when you select the **Employees** check box and the **Changes Since Last Export** check box is not selected.

**Delttek does not recommend that you select this check box the first time you export employees to SilkRoad. This will ensure that you will not export any past employees that do not need access (or to be accessed) in SilkRoad.**

### (Threshold) Date

Enter, or click  to select, a threshold date in this field. Employees with termination dates before this date will not be included in the export. This field is active only when you select the **Employees** and **Exclude Employees with Termination Dates before <date>** check boxes, while the **Changes Since Last Export** check box is not selected.

### Organizations/HR Organizations

The data that is exported if this check box is selected depends on the **Manager/HR Representatives Defaults** method selected on the Configure Personnel Settings screen. If the method is **By Company-wide Organization**, then Organizations will be exported to SilkRoad. Otherwise, if the method is **By HR Organization**, then HR Organizations will be exported to SilkRoad.

Select this check box to include Organizations/HR Organizations in the export to SilkRoad. These are referred to as Departments in SilkRoad.

If you select the **Changes since last export** check box, the process includes only the Organizations/HR Organizations with changes since the last time the export ran.

### Detail Job Titles

Select this check box to include Detail Job Titles in the export to SilkRoad. These are referred to as Jobs in SilkRoad. Only Detail Job Titles with changes since the last export will be included if the **Changes since last export** check box is selected.

### Labor Locations

Select this check box to include Labor Locations in the export to SilkRoad. These are referred to as Locations in SilkRoad.

If you select the **Changes since last export** check box, the process includes only the labor locations with changes since the last time the export ran.

### Job Templates

Select this check box to include Job Templates in the export to Silk Road. For Costpoint to provide a more complete employee-setup data for a new employee, a Job Template should be set up in Costpoint and tied to the employee in SilkRoad. When that new employee is imported into Costpoint, the job template ID will be used to determine the required missing employee data. Only job templates which meet the following criteria will be exported:

- The job template record was updated since the last export date. This only applies if you select the **Changes since last export** check box.

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- The job templates with an **Approved** status.

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## **COSTPOINT - SILKROAD INTEGRATION OVERVIEW**

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Costpoint - SilkRoad Integration allows you to import SilkRoad new hire employee-related information into Costpoint. Costpoint - SilkRoad integration also allows you to export Costpoint employees, position requisitions, detail job titles, organizations/HR organizations, and labor locations to SilkRoad.

The integration process does not support Transfers (internal applicants) or Rehires of previous employees if the same ID was used.

You can perform the import/export process through the [Transfer Silk Road Data](#) screen in the Employee domain.

You can run the Costpoint - SilkRoad Integration manually or by scheduling the integration process to run at a specific time. To be able to transfer information to and from SilkRoad, the integration uses SilkRoad Connect, a cloud-based integration tool from SilkRoad. SilkRoad Connect runs on a scheduled basis.

### **Costpoint to SilkRoad Integration Details**

When the integration runs, the standard information that Costpoint exports to SilkRoad includes the following:

- Employee Information (Users)
- Labor Locations (Company Locations)
- Job Titles (Jobs)
- Organization/HR Organization (Departments)
- Job Requisitions (Position Template)

The SilkRoad Connect tool shares the information from Costpoint to SilkRoad products:

- OpenHire
- RedCarpet
- WingSpan
- GreenLight

### **Silkroad to Costpoint Integration Details**

The integration imports SilkRoad new hire information that is created during the Onboarding process in RedCarpet. A Human Resources (HR) Coordinator will use the out-of-box Onboarding template in SilkRoad to create a new hire record and enter Costpoint employee ID and associate requisition ID. After the creation of record, the transfer of the new information will be initiated based on Red Carpet workflow event. When you import the SilkRoad new hire information to Costpoint, the process creates employee records based on SilkRoad data and the data from Costpoint job requisition.

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## COSTPOINT - SILKROAD INTEGRATION CONNECTION SETTINGS

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For Costpoint – SilkRoad Integration to work, you must enable SilkRoad integration in the Costpoint Configuration Utility and enter the proper connection settings.

SilkRoad is a hosted solution not managed by Deltek. Please consult with SilkRoad Support on proper connection URLs, user ID, and password for your company.

To configure the Costpoint – SilkRoad Integration connection settings, complete the following steps:

1. Open the Costpoint Configuration Utility and click **Costpoint** tab » **Silk Road** tab.
2. Select the **Enable Silk Road Integration** check box to allow the integration.
3. Enter the SilkRoad Connect Secure FTP details in the **Secure FTP Interface Configuration** group box.
  - **Connection URL** — Enter the SilkRoad Connect Secure FTP site. For example, <https://secureftp.silkroad.com>.
  - **User** — Enter the Secure FTP user name.
  - **Password** and **Confirm Password** — Enter and confirm the password of the Secure FTP user.
  - **Buffer Size** — The default value is **100**. Do not change the value in this field unless you have specific reasons for the change.
  - **SFTP Export Folder** — Enter the folder/subfolder where the CSV files will be exported when you run [Transfer Silk Road Data](#) screen process.
  - **SFTP Import Folder** — Enter the folder/subfolder where the CSV files will be imported when you run Transfer Silk Road Data screen process.
4. Click **Test** in the Secure FTP Interface Configuration group box to check if the settings are correct.
5. Enter the SilkRoad RedCarpet web services interface details in the Web Service Interface Configuration group box.
  - **Connection URL** — Enter the URL for SilkRoad web services
  - **User Name** — Enter the user name for the web services URL.
  - **Password** and **Confirm Password** — Enter and confirm the password for the web services URL.
6. Click **Test** in the Web Service Interface Configuration group box to check if the settings are correct.
7. Restart all WebLogic servers or run the Rebuild Global Settings screen to allow the changes to take effect.

For more information on using the Costpoint Configuration Utility application, please refer to the *Deltek Costpoint 7.0.1 Configuration Utility* guide.

### [COSTPOINT - SILKROAD INTEGRATION IMPLEMENTATION](#)

## COSTPOINT - SILKROAD INTEGRATION IMPLEMENTATION

To allow the transfer of information between the Costpoint and SilkRoad systems, complete the following steps:

1. Install the Costpoint - SilkRoad Integration package.
2. Configure the Web Service Integration in the Costpoint Configuration Utility. For more information, refer to the [Costpoint – SilkRoad Integration Connection Settings](#) topic in the Costpoint online help.
3. Create/update the company locations on the Manage Labor Location/Locals screen in Costpoint. On the Manage Labor Location/Locals, you will need to:
  - Enter/manage the same labor location in both SilkRoad and Costpoint.
  - Enter the Labor Location address information and classification.
  - Specify whether or not the Labor Location is active in SilkRoad.
4. Enter the appropriate settings on the Configure Personnel Settings screen in Costpoint. For example, if you do not use the approval process in Costpoint, select the **Auto-Approve Position Requisition** option and enter the **Default Requisition Approver** information.
5. Enter open job requisitions on the Manage Position Requisition Requests screen in Costpoint. You can also set the timesheet default and Project Manufacturing integration details on this screen.
6. Enter the following Visa type codes on the Manage Visa Types screen in Costpoint to match the Visa types that are available in SilkRoad:

Visa Type Code	Visa Type Description
EB-1	Student (academic or language training program)
EB-2	Spouse or child of alien classified F-1
EB-3	Principal resident representative of recognized foreign member government that is a member of an international organization, his staff, and members of immediate family
EB-4	Other representative of recognized foreign member government that is a member of an international organization, and members of immediate family
EB-5	Representative of foreign government not recognized by the United States and not a member of an international organization, and members of immediate family
H-1B	Specialty Occupations, DOD workers, fashion models
H-1C	Registered Nurse Working in a Health Professional Shortage Area
H-2A	Temporary agricultural workers
H-2B	Temporary worker: skilled and unskilled
H-3	Trainee
H-4	Spouse or child of alien classified H-1, H-2, or H-3
INV	
L-1A	Intra-company transferee (Executive, managerial)

<b>L-1B</b>	Intra-company transferee (Specialized knowledge)
<b>L-2</b>	Spouse or minor child of alien classified L-1
<b>O-1</b>	Aliens with extraordinary ability in sciences, arts, education, business, or athletics
<b>O-2</b>	Accompanying alien to O-1
<b>O-3</b>	Spouse or child of O-1 or O-2
<b>SK-1</b>	Victims of a Severe Form of Trafficking in Persons
<b>SK-2</b>	Victim of a severe form of trafficking in persons
<b>SK-3</b>	Spouse of a victim of a severe form of trafficking in persons
<b>SK-4</b>	Child of victim of a severe form of trafficking in persons

7. If necessary, update the Visa Type codes currently assigned to employees on the HR Data tab of the Manage Employee Information screen in Costpoint.
8. Ensure that you are using the correct Marital Status codes on the HR Data tab of the Manage Employee Information screen. Valid options are:
  - **M** — Married
  - **S** — Single
  - **D** — Divorced
  - **E** — Separated
  - **W** — Widowed
  - **U** — Unknown
9. Verify that the ISO-2 and ISO-3 codes are entered for each country on the Manage Countries screen.
10. To include human resources (HR) representative data in the integration, complete the following steps: (Optional)
  - Go to the Configure Personnel Settings screen 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:
    - 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.
11. Configure export to SilkRoad process on the [Transfer Silk Road Data](#) screen in Costpoint.
12. Configure Process Server for export to SilkRoad. (Optional)
13. Configure Process Server for import from SilkRoad. (Optional)

For more information on using the Costpoint screens that were mentioned in this section, please refer to the Costpoint online help.

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[COSTPOINT - SILKROAD INTEGRATION CONNECTION SETTINGS](#)

## COSTPOINT - SILKROAD INTEGRATION PROCESSING

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Costpoint - SilkRoad Integration allows you to import SilkRoad new hire employee-related information into Costpoint. Costpoint - SilkRoad integration also allows you to export Costpoint employees, position requisitions, detail job titles, organizations/HR organizations, and labor locations to SilkRoad.

The integration process does not support Transfers (internal applicants) or Rehires of previous employees if the same ID was used.

### Create Costpoint Position Requisitions


To create new positions in Costpoint, you will need to follow these guidelines:

1. Ensure the necessary Organizations or HR Organizations are set up.
2. Ensure the necessary Labor Locations are set up.
3. Ensure the necessary Detail Job titles are set up.
4. Enter the Position Requisition on the Manage Position Requisitions screen. Since the position information in this record will be used to build the new hire's employee record when he/she is imported into Costpoint, ensure that all necessary data is entered.

### Export Costpoint Data to SilkRoad

When you have new position requisitions and/or when you add detail job titles, organizations, and labor locations in Costpoint, use the Transfer Silk Road Data screen to export the new information to SilkRoad. You can export the information either manually or by scheduling an export process.

To export information to SilkRoad, complete the following steps.

1. Go to the [Transfer Silk Road Data](#) screen in Costpoint.
2. Enter a **Parameter ID** and **Description** in the **Identification** group box.
3. In the **Export** group box, select the check box of the information that you want to export. Valid options are:
  - ☒ Employees
  - ☒ Organizations/HR Organizations
  - ☒ Detail Job Titles
  - ☒ Labor Locations
  - ☒ Positions Requisitions
4. If you only want to export the changes since the last time the export was ran, select the **Changes since last export** check box. If you do not select the **Changes since last export** check box, the generated CSV file will include a full export of the selected Costpoint values.
5. Click  to run the export process immediately. If you want to schedule the export process at a later time, click **Save**, and schedule a job on the Manage Jobs screen.

### SilkRoad New Employee Processing

Before you can import SilkRoad employee data into Costpoint, SilkRoad must generate a CSV file that contains the new employee records. SilkRoad creates the CSV files in an SFTP folder after the following steps/tasks have been completed in SilkRoad RedCarpet:

1. The Human Resource (HR) Coordinator adds a new employee profile for a position requisition. If the applicant was entered in SilkRoad OpenHire, the employee profile will be created when the employee information is transferred to SilkRoad RedCarpet.
2. The HR Coordinator creates an event: **Onboarding for Deltek**. This creates tasks that must be completed by the new employee.

The date that you enter when you create the **Onboarding for Deltek** event determines the start of the event.

## TRANSFER SILKROAD DATA


3. The new employee completes the **Welcome to Our Company** task and **New Hire Onboarding Form** task.
4. The HR Coordinator completes the **New Hire Onboarding Form – HR** task.

After the completion of the New Hire Onboarding Form, SilkRoad exports the employee information in CSV file to an SFTP folder. SilkRoad exports new employee information to a CSV file every fifteen minutes.

### Import SilkRoad Data to Costpoint

After SilkRoad creates the CSV file that contains new employee information, you can import the information using the Transfer Silk Road Data screen.

**To import the SilkRoad information to Costpoint, complete the following steps.**

1. Go to the Transfer Silk Road Data screen in Costpoint.
2. Enter a **Parameter ID** and **Description** in the **Identification** group box.
3. Select the **New Employees** check box in the Import group box and **Employees** check box in the **Export** group box.
4. The **Employees** check box must be selected when you import new employees because the new hires will not be considered as employees until they are exported back to SilkRoad.
5. Click  to run the export process immediately. If you want to schedule the export process at a later time, click **Save**, and schedule a job on the Manage Jobs screen.
6. Go to the Manage Employee Information screen, and run a query for the new employee records to verify if the import was successful.

The Manage Employee Information screen will use the requisition ID to load the employee default values.

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