

Deltek

Deltek Costpoint® 8.2

Replicon Time Integration Guide

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Introduction

Welcome to the Deltek Costpoint and Replicon Time Integration Technical Guide. This guide provides information on the integration scenarios, business workflows, and data mapping between Costpoint and Replicon. The mapping is used in the integration process.

This guide also contains troubleshooting steps for checking issues that may have occurred during the integration.

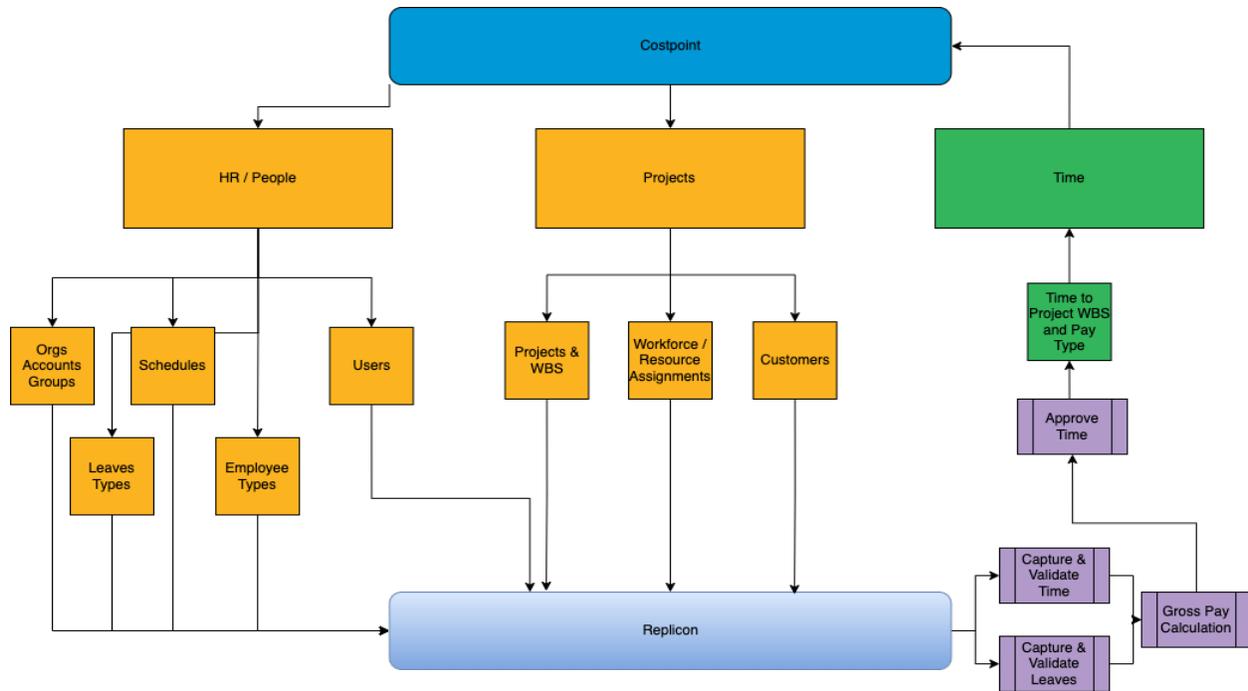
Deltek's Costpoint and Replicon solutions enable organizations to capture, validate, and transform project time data in a modern and configurable user experience across desktop and mobile, optimize cash flow and resources, leverage deep project and cost visibility, and manage contracts compliant with Federal Acquisition Regulations (FAR) to power project success from start to finish.

Integration Overview

The integration between Costpoint and Replicon utilizes existing APIs.

Within Costpoint, the integration is performed using the Web Integration Console. It handles the export of data to Replicon, the initial load and synchronization, and the import of time information into Costpoint from Replicon.

The following diagram provides a visualization of the interface.



Integration Prerequisites

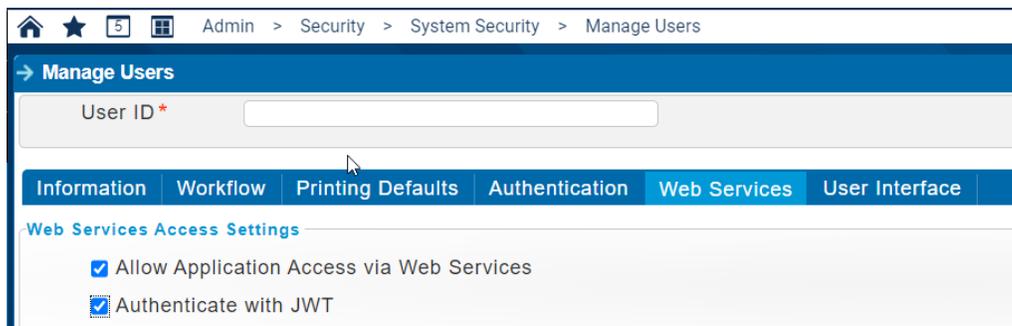
In order for the Costpoint and Replicon Integration to work, you must connect your Costpoint and Replicon environments together using the Web Integration Console.

Set Up the Required Costpoint Configuration

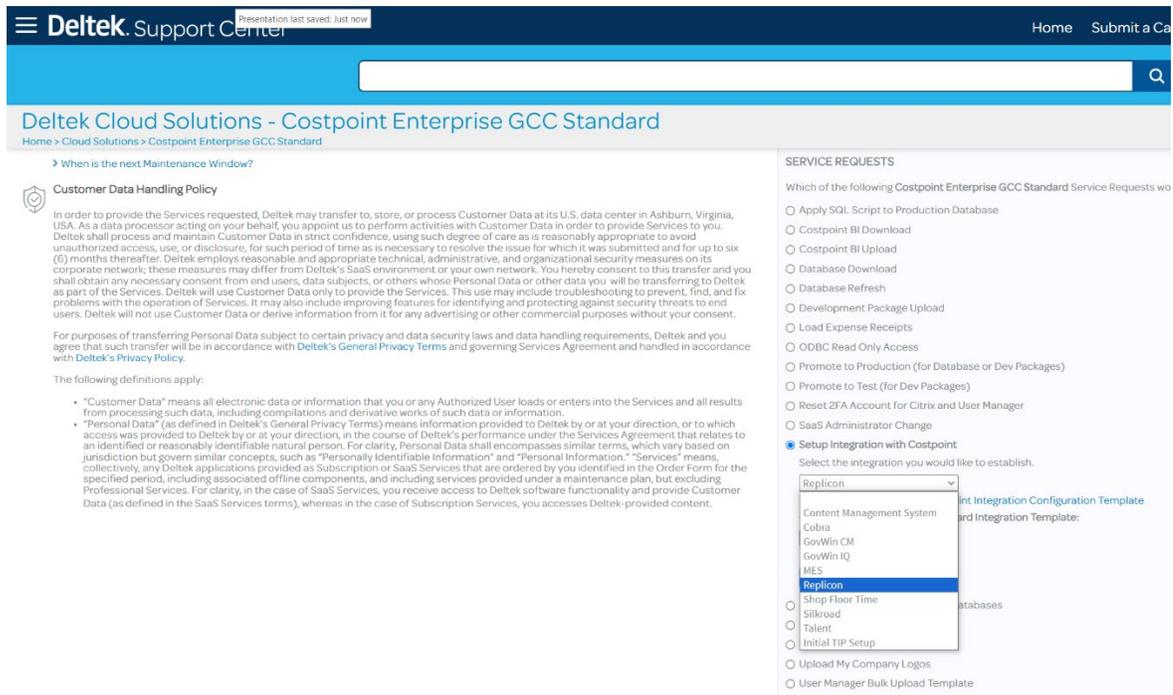
In order to run this procedure, you must have a Costpoint tenant and be a user with administrative-level permissions.

To set up the Costpoint configuration:

1. Navigate to **Admin » Security » System Security » Manage Users**.
2. On the Manage Users screen, select both the **Allow Application Access via Web Services** and **Authenticate with JWT** checkboxes.



3. Open a support case with Deltek support to set up the integration.
4. Upload the Replicon methods the Costpoint instance by opening a support case with Deltek Support.



5. Provide a list of company codes in Costpoint to Replicon.
6. Open the Timesheet Period.
7. Open the Subperiods, Journal Periods, and Fiscal Year
8. Link the project labor categories to projects.
9. Link the account group to projects (under Manage project account group).
10. Assign the workforce to a project (under Manage employee workforce).

Set Up the Required Replicon Configuration

In order to run this procedure, you must have a Replicon tenant with TimeBill Plus and Workforce Management licenses and be a user with administrative-level permissions.

To set up the Replicon configuration:

1. Configure the pay codes in Replicon to match the pay codes in Costpoint.
2. Synchronize the pay code multipliers to the configuration in Costpoint.
3. Synchronize the Time Off Type pay codes to the Time Off Project codes in Costpoint.
4. Select the **Authenticate with JWT** checkbox.
5. For the Timesheet Template(s), set the time distribution category to **Payroll**.
6. Assign the Billing rate (Labor Category – PLC) to the project.
7. Rename the default Group Field Names as follows:

Default Name	New Name
Service Center	Country
Department	General Labor Category
Divisions	Organizations
Cost Center	Accounts
Locations	Labor Location

- Select the organization in the project.
- Assign accounts to the user.
- Set the Replicon Project Code to a unique identifier under **Administration » Project Settings**.

Costpoint to Replicon Integration

This section provides information about mapping the data used in the integration between the Costpoint and Replicon systems. The integration starts with populating the Replicon environment with employee, project, and time setup information including:

- User/Employee Profile Data
- Applicable Org, HR and project related attributes including accounts, cost centers employee schedules, leave types, etc.
- Project WBS and related attributes

As information is updated in Costpoint, it also updates in Replicon.

Data Mapping

Users

Replicon Users directly relate to Costpoint's Employees. Below is how the data is mapped to Replicon.

Costpoint OBJECT_ID	Costpoint Field Name	Replicon Field Name
ACCT_ID	Account	Group - Account
CHG_ORG_ID	Organization	Group - Organization
COUNTRY_CD	Country	Group - Country
EMAIL_ID	Work	Email
EMPL_ID	Employee	Employee ID / LoginName
FIRST_NAME	First Name	First Name
GENL_LAB_CAT_CD	GLC	OEF - General Labor Category
LAB_LOC_CD	Labor Location~Local	Group - Labor Location Local
LAST_FIRST_NAME	Displayed Name	Display Name
LAST_NAME	Last Name	Last Name
ORIG_HIRE_DT	Current Hire Date	User Start Date
PAY_TYPE	Pay Type	OEF - Pay Type
S_EMPL_STATUS_CD	Status	Status
TAXBLE_ENTITY_ID	Taxable Entity	OEF - Taxable Entity
TERM_DT	Termination Date	End Date

Costpoint OBJECT_ID	Costpoint Field Name	Replicon Field Name
TS_PD_CD	Timesheet Cycle	Timesheet Period
EMPL_CLASS_CD	Employee Class	OEF - Employee Class
EXMPT_FL	FLSA Exempt	OEF - FLSA Exempt
LDM_EMPLLABININFO_CHILD_BILL_LAB_CAT_CD	PLC	OEF - Project Labor Category
LDM_EMPLLABININFO_CHILD_GENL_LAB_CAT_CD	GLC	Group - General Labor Category
SPVSR_EMPL_ID	Supervisor	Supervisor
S_EMPL_TYPE_CD	Employee Type	Employee Type
LDMEINFO_PAYTYPE_PAY_TYPE	Pay Type	OEF - Pay Type

Project and PLC Data

Below is how the data in the Costpoint Project and PLC tables is mapped to Replicon. The data contained in these tables link projects to PLCs and also link projects to employees and employees to PLCs.

Costpoint OBJECT_ID	Costpoint Field Name	Replicon Field Name
CUST_ID	Customer	Client ID
CUST_NAME	NULL	Client Name
CUST_PO_ID	Purchase Order No	OEF - Purchase Order No
EMPL_ID	Project Manager	Project Manager
LIMIT_ORGS_FL	Organizations	Group - Organizations
OPP_ID	CTM &CPT.OPP& ID	OEF - Opportunity ID
ORG_ID	Owning Org	Group - Organization
PROJ_END_DT	End Date (POP)	End Date
PROJ_ID	Project	Project Code
PROJ_NAME	Name	Description
PROJ_START_DT	Start Date (POP)	Start Date
S_PROJ_RPT_DC	Project Classification	OEF - Project Classification

Replicon to Costpoint Integration

The integration from Replicon to Costpoint currently consists of approved time data. Costpoint takes the data provided by Replicon and populates the fields in Costpoint.

DataMapping

Timesheet Information

Below is how the timesheet information is mapped from Replicon to Costpoint.

Costpoint OBJECT_ID	Costpoint Field Name	Replicon Field Name
EMPL_ID	Employee	Employee ID
FY_CD	Fiscal Year	Year of Timesheet Period Start
OTH_HRS	Other Hours	Overtime-type hours/ Hours with multiplier different from 1.0
PD_NO	Period	Period of Financial Year: Month of the timesheet period
REFERENCE_SEQ_NO	Sequence	For correcting timesheet, reference of the last timesheet
REFERENCE_TS_TYPE_CD	Type	Type of reference timesheet
REG_HRS	Regular Hours	Regular Hours
SUB_PD_NO	Subperiod	1 (hard coded)
TH__AUTO_ADJ_PCT_RT	Auto Adjust %	1 (hard coded)
TH__CORRECTING_REF_DT	Date	Time Entry Date
TS_DT	Date	Timesheet End Date
ACCT_ID	Account	Group - Account (Cost Center Code)
BILL_LAB_CAT_CD	PLC	Billing Rate Code
ORG_ID	Organization	Project's Group - Organization (Project » Division » code)
PAY_TYPE	Pay Type	Time Entry OEF - Pay Type / Pay Code Code
PROJ_ID	Project	Project Code

Costpoint OBJECT_ID	Costpoint Field Name	Replicon Field Name
TS_LN_DT	Line Date	Time Entry Date (Blank in case grouping of data is enabled)
TS_LN___CHG_HRS	Hours	Hours
TS_LN___NOTES	Notes	Comments
TS_LN___S_TS_LN_TYPE_CD	Line Type	A (hard coded)

Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using Costpoint and Replicon Integration, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center 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 Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

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