

# Deltek Costpoint® 7.1.1

## HRsmart Integration

### Technical Guide

**August 14, 2015**

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## Contents

HRsmart Integration .....	1
Overview .....	1
Customer Services .....	1
Customer Care Connect Site .....	1
Integration Overview .....	3
Integration Configuration .....	4
Costpoint to HRsmart Integration .....	6
Overview .....	6
Data Mapping .....	6
Troubleshooting.....	13
HRsmart to Costpoint Integration .....	15
Overview .....	15
Data Mapping .....	15
Troubleshooting.....	28
Monitoring the Status of HRsmart Integrations .....	33
Guidelines for HRsmart Users .....	34
Requisition.....	34
Drop-down Selection Values .....	34
Salary .....	34
Onboarding.....	35
Diversity Information.....	35
Social Security Number.....	35
Org Structure .....	35
Users .....	35
Custom Fields .....	36

## Overview

Welcome to the Deltek Costpoint 7.1.1 HRsmart Integration Technical Guide. This guide provides the data mapping between Costpoint objects and HRsmart objects. The mapping is used in the integration process.

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

## Customer Services

For over 20 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 Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training



[Find out more about these and other services from the Customer Care Connect site.](#)

## 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:

- 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 Connect Customer Forums
- 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
- Use Quick Chat to submit a question to a Customer Care analyst online



If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions

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## 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**.
- 



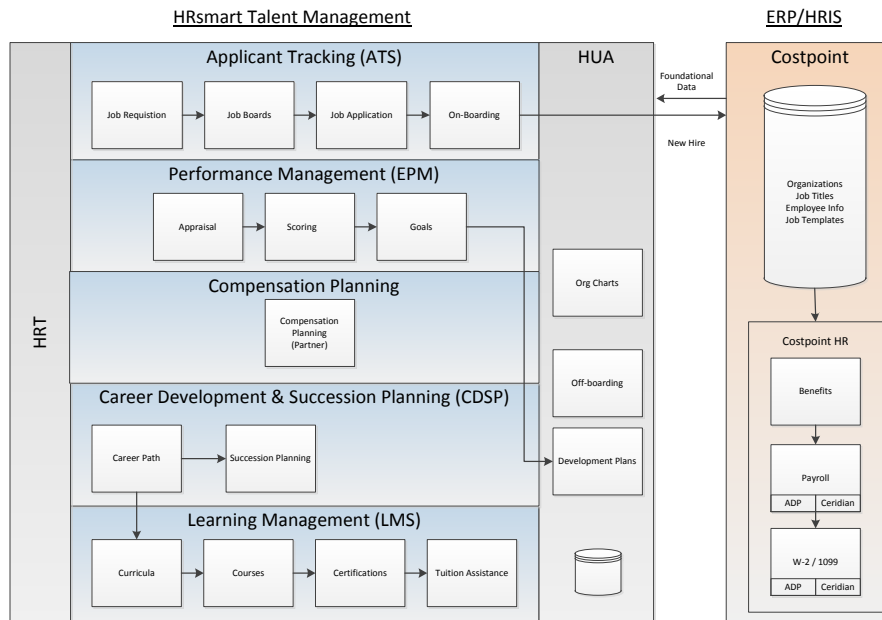
If you do not have a username and password for the Customer Care Connect site, contact your firm's Costpoint – HRsmart Integration Administrator.

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

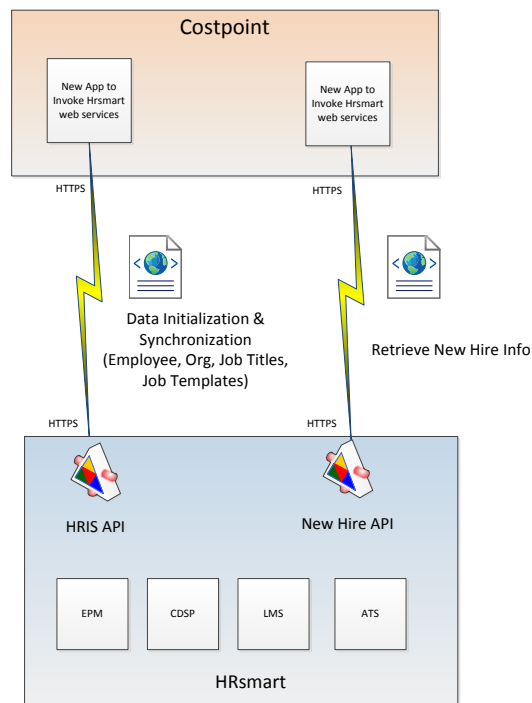
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## Integration Overview

The integration between Costpoint and HRsmart utilizes existing and new APIs in the HRsmart. Within Costpoint the integration is performed in the Transfer HRsmart Data application. This application can be run on demand or scheduled via process server. It handles both export of data to HRsmart, initial load and synchronization, and import of new hires into Costpoint from HRsmart. The diagram below provides a visualization of the interface.



The diagram below depicts integration from a technical implementation perspective.



# Integration Configuration

In order for Costpoint – HRsmart Integration to work, you must enable HRsmart integration in the Costpoint Configuration Utility and enter the proper connection settings.

Costpoint Configuration Utility Version 7.0.1 Build 20150527

**Costpoint** | Weblogic | Dedicated Servers | Logging | Reporting | IIS | CMS

**Costpoint Installation General Information**

Costpoint Home: C:\deltek\costpoint\70 [Move] [Change Path]

Enterprise App External URL: http://localhost:7009 [Run CP Tools Remotely] [Use GZip For Sending HTML]

Job Scheduler Polling Interval: 30 Data Save Transaction Timeout: 600 WS Transaction Timeout: 3600

**Select SYSTEM**

Displaying System: C701RQMR2 [Add] [Clone] [Remove] [Activate]

Project Manufacturing | SilkRoad | Exchange | Cobra | GovWin CM | **HRsmart**

System | Databases | Custom Databases | Extensibility

**HRsmart Integration Connection Information**

☒ Use HRsmart Integration

**HRsmart URL Options**

☐ Production ☐ Development ☒ Other

HRsmart Web Service URL: https://costpointsoa.appdev.hua.hrsmart.com

Password (Auth Token): [Masked]

Confirm Password: [Masked]

Number Of Rows Per Call: 24999

Connection Timeout: 10000

Request Timeout: 10000 [Test]

[Save] [Undo] [Close] [Configuration Properties]

To configure the Costpoint - HRsmart Integration connection settings, complete the following steps:

1. Open the Costpoint Configuration Utility and click **Costpoint** tab » **HRsmart** tab.
2. Select the **Use HRsmart Integration** check box to allow the integration.
3. In the HRsmart URL Options group box, select the option for site of the web service that you will use. The following are the available options:
  - **Production** – Select this option to set **HRsmart Web Service URL** value to **https://soa.hrsmart.com**.
  - **Development** - Select this option to set **HRsmart Web Service URL** value to **https://soadev.hrsmart.com**.

- **Other** – Select this option to enter a custom site in the **HRsmart Web Service URL** field.
4. Enter the HRsmart connection details in the following fields:
    - **HRsmart Web Service URL** – If you selected either **Production** or **Development** option in the **HRsmart URL Options** group box, this field is disabled and it displays predefined values based on the option you selected.  
  
If you selected the **Other** option in the **HRsmart URL Options** group box, enter the HRsmart web service site that you will use for integration. For example, <https://costpointsoa.appdev.hua.hrsmart.com>. When you enter a custom URL, do not include the path `/API/gateway.php`.
    - **Password (Auth Token)** – Enter the authentication token provided by HRsmart.
    - **Confirm Password** – Enter the authentication token again to confirm the value.
    - **Number of Rows Per Call** – Enter the number of records (from 1 to 24999) to be sent per call to the web service.
    - **Connection Timeout** – Enter the time in milliseconds for Costpoint to wait for a connection before it timeouts.
    - **Request Timeout** – Enter the time in milliseconds for CP to wait for a response once a request has been sent before it will timeout.
  4. Click **Test** to check if the connection settings are correct.
  6. Restart all WebLogic servers or run the Rebuild Global Settings screen in Costpoint to allow the changes to take effect.

For more information on using the Costpoint Configuration Utility application, please refer to the *Delttek Costpoint 7.1.1 Configuration Utility* guide.



# Costpoint to HRsmart Integration

## Overview

This section provides information about mapping of data that used in the integration between the Costpoint and HRsmart systems. The integration data from Costpoint to HRsmart consists of the following. Please note that different naming of the data between Costpoint and HRsmart.

Costpoint Data	HRsmart Data
Company/Organization	Organization Levels
Detail Job Titles/Positions	Job Profiles
Employees	Users
Job Templates	Costpoint Job Templates

## Data Mapping

### Organization Levels

HRsmart Organization levels directly relate to Costpoint's Company and Organization structure. Below is how the data is mapped to HRsmart:

HRsmart Destination	Costpoint Source
org_level_code	Company - Populate with the COMPANY_ + ORG.company_id Lower Level(s) – Organization Populate with the Organization's Name (ORG.org_id)
org_level_name	Top Level (Company) - Populate with the GL_CONFIG.company_name Lower Level(s) – Organization, Populate with the Organization's Name (ORG.org_name) + (ORG.org_id)
org_level_parent_code	Top Level (Company) - Populate with 'top_level' Lower Level(s) – Organization  IF the Organization is a top level organization (ORG.org_top_fl = 'Y')  THEN populate with COMPANY_+ ORG.company_id (Example: If the ORG_ID is 1 and it's linked to company AAA, then send 'COMPANY_AAA')  ELSE (IF the Organization is not a top level organization (ORG.org_top_fl = 'N'))

HRsmart Destination	Costpoint Source
	<p>THEN populate with the Organization's parent ORG.org_id (Example: If the ORG_ID is 1.2.3, then send '1.2')</p> <p>END IF</p>

## Job Profiles

HRsmart Jobs directly relate to Costpoint's Detail Job Titles and Positions. This data only if licensed for Costpoint HR. Below is how the data is mapped to HRsmart:

HRSmart Destination	Costpoint Source
job_code	DETL_JOB_TITLES.dctl_job_cd
job_title	DETL_JOB_TITLES.dctl_job_desc
salary_grade	N/A
division	<p>IF Detail Job Title Position Exists with Org ID</p> <p>Top Org level of H_DETL_POS_DESC.org_id where H_DETL_POS_DESC.dctl_job_cd = DETL_JOB_TITLES.dctl_job_cd</p> <p>ELSE</p> <p>N/A</p>
company_code	<p>IF Detail Job Title Position Exists with Org ID</p> <p>Populate with the ORG.company_id assigned to the H_DETL_POS_DESC.org_id preceded by 'COMPANY_' (for example, if the H_DETL_POS_DESC.org_id = 1.2.210, and that Org is linked to Company ACME, then this field would be populated with 'COMPANY_ACME')</p> <p>ELSE</p> <p>N/A</p>
job_family	N/A
Job_duration	N/A
job_description	<p>IF Detail Job Position exists for Detail Job Code and result of this logic is not NULL, then populate with:</p> <p>H_DETL_POS_DESC.short_desc where H_DETL_POS_DESC.dctl_job_cd =</p>

HRSmart Destination	Costpoint Source
	DETL_JOB_TITLES.dctl_job_cd + <space> + H_DETL_POS_DESC.duties_tx where H_DETL_POS_DESC.dctl_job_cd = DETL_JOB_TITLES.dctl_job_cd + <space> + H_DETL_POS_DESC.other_info_nt where H_DETL_POS_DESC.dctl_job_cd = DETL_JOB_TITLES.dctl_job_cd  ELSE  Populate with 'No job description available'
job_requirements	N/A ("::" passed so HRsmart knows not to overwrite)
external_job_title	DETL_JOB_TITLES.ext_dctl_job_title
education	N/A
job_role	N/A
job_function	N/A
job_level	N/A
cost_center	N/A
cost_center_code	N/A
job_grade	N/A
job_key	N/A
job_classification	N/A
eeoc_job_category	N/A
eeoc_job_group	N/A
job_type	Costpoint Employee Type = IF the Costpoint Detail Job Title being exported exists in the Manage Detail Position Descriptions (H_DETL_POS_DESC) table THEN Costpoint Employee Type = the Position Type assigned to the Detail Job Title in the Manage Detail Position Descriptions table

HRSmart Destination	Costpoint Source
	(H_DETL_POS_DESC.s_empl_type_cd) END IF  HRsmart job_type = IF Costpoint Employee Type = 'R' THEN populate with 'Full-Time' ELSE IF Costpoint Employee Type = 'P' THEN populate with 'Part-Time' ELSE IF Costpoint Employee Type = 'T' THEN populate with 'Temporary' ELSE THEN send NULL value END IF
travel	N/A
location_code	N/A
location_group	N/A
requisition_position_type	N/A

## Users

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

HRSmart Destination	Costpoint Source
user_id	N/A (Assigned in HRsmart)
user_email	IF EMPL.home_email_id is <u>not</u> NULL THEN populate with the EMPL.home_email_id ELSE (IF EMPL.home_email_id <u>is</u> NULL) THEN populate with the EMPL.email_id
user_firstname	EMPL.first_name
user_middlename	EMPL.mid_name
user_lastname	EMPL.last_name
user_employee_id	EMPL.empl_id

HRSmart Destination	Costpoint Source
user_login	EMPL.email_id
user_lockedout	N/A
user_password	N/A
user_address_one	EMPL.ln_1_adr
user_address_two	EMPL.ln_2_adr
user_address_three	EMPL.ln_3_adr
user_city	EMPL.city_name
user_state	EMPL.mail_state_dc
user_zipcode	EMPL.postal_cd
user_country	IF the employee's EMPL.country_cd is NULL and the EMPL.ssn_id != '999999999' THEN populate with 'US' ELSE IF the employee's EMPL.country_cd is not NULL THEN populate with the COUNTRY.iso2_cd where EMPL.country_cd = COUNTRY.country_cd END
phone_work	EMPL_PHONE.phone_id where phone_type_dc = 'WORK'
phone_data	N/A
phone_home	EMPL_PHONE.phone_id where phone_type_dc = 'HOME'
phone_mobile	EMPL_PHONE.phone_id where phone_type_dc = 'MOBILE'
phone_pager	EMPL_PHONE.phone_id where phone_type_dc = 'PAGER'
phone_fax	EMPL_PHONE.phone_id where phone_type_dc = 'FAX'
user_hire_date	EMPL.orig_hire_dt
user_dob	EMPL.birth_dt

HRSmart Destination	Costpoint Source
user_location	N/A
user_status	<p>Based on EMPL_LAB_INFO.exmpt_fl where effect_dt &lt;= System Date and end_dt &gt;= System Date</p> <p>If EMPL_LAB_INFO.exmpt_fl = 'Y'</p> <p>Populate with 'EXEMPT'</p> <p>Otherwise</p> <p>Populate with 'NON-EXEMPT'</p>
user_org_level	EMPL_LAB_INFO.org_id where effect_dt <= System Date and end_dt >= System Date
job_code	EMPL_LAB_INFO.dctl_job_cd where effect_dt <= System Date and end_dt >= System Date
position_code	N/A
user_manager	EMPL_LAB_INFO.mgr_empl_id where effect_dt <= System Date and end_dt >= System Date
user_peer_appraisers	N/A
user_matrix_managers	N/A
user_approvers	<p>IF the client is licensed for Costpoint HR and the <b>Manager Defaulting Method</b> from the Configure Personnel Settings screen = 'Company-Wide Organization' and an HR Representative is assigned to the Home Organization in the Manage Managers/HR Reps by Organization table</p> <p>Populate this field with the HR Representative assigned to the Home Org (ORG_MGR_DFLT.hr_rep_empl_id where home_org_id = employee's Home Org)</p> <p>IF the client is licensed for Costpoint HR and the <b>Manager Defaulting Method</b> from the Configure Personnel Settings screen = 'HR Organization' and an HR Representative is assigned to the HR Organization in the Manage Managers/HR Reps by HR Organization table</p> <p>Populate this field with the HR Representative assigned to the HR Org (HR_ORG_MGR_DFLT.hr_rep_empl_id where hr_org_id = employee's HR Org)</p>
hrbps	N/A

HRsmart Destination	Costpoint Source
user_group	N/A
active/inactive	If EMPL.s_empl_status_cd = 'ACT' or 'FML' Populate with 'A' Otherwise populate with 'I'
national_identifier	If EMPL.ssn = 999999999 N/A Else Populate with EMPL.ssn_id
user_terminated	EMPL.term_dt
user_time_zone	N/A
user_rehire_eligibility_id	N/A
user_termination_reason	N/A
user_separation_reasons	N/A
user_original_email	N/A
user_separation_comments	N/A
wizard_target_id	N/A



Costpoint employees defined as subcontractors will not be in data.

## Job Templates

Job Templates are optional data that provides HRsmart with the valid list of Job Templates in Costpoint that can be associated to new hires. These Job Templates provide additional data defaulting capabilities when importing new hires into Costpoint

HRsmart Destination	Costpoint Source
job_template_id	H_POS_RQ_RQST.company_id + "I" H_POS_RQ_RQST.rq_no

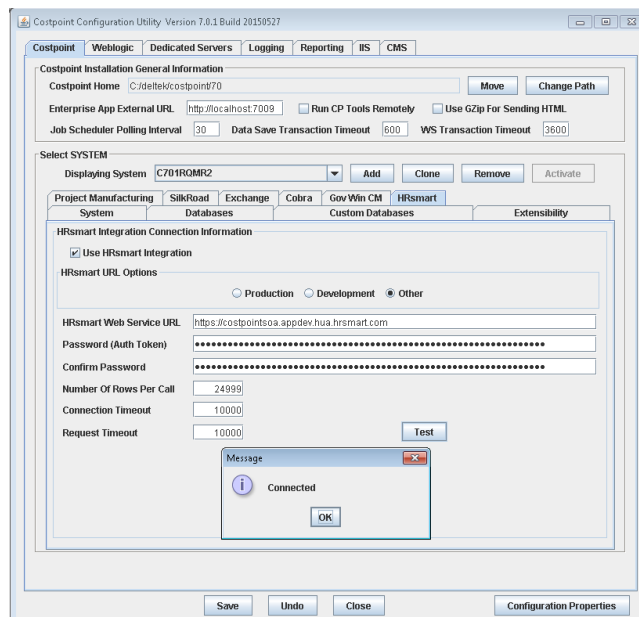
HRsmart Destination	Costpoint Source
job_template_name	<p><b>Job Title Description</b> = DETL_JOB_TITLES.dctl_job_desc where DETL_JOB_TITLES.dctl_job_cd = H_POS_RQ_RQST.dctl_job_cd</p> <p>IF the Manager Default Method in the Login Company's Configure Personnel Settings screen = 'HR Organization' (H_PER_ADM_SETTINGS.s_mgr_dft_mthd_cd = 'H' where H_PER_ADM_SETTINGS.company_id = &lt;Login Company&gt;) and H_POS_RQ_RQST.hr_org_id is <u>not</u> NULL <b>Org</b> = H_POS_RQ_RQST.hr_org_id ELSE <b>Org</b> = H_POS_RQ_RQST.org_id END IF ELSE (IF client is <u>not</u> licensed for Costpoint HR) <b>Job Title Description</b> = H_POS_RQ_RQST.title_desc <b>Org</b> = H_POS_RQ_RQST.org_id END IF</p> <p><b>Costpoint Job Template Name</b> = Org + " " + Job Title Description</p>

## Troubleshooting

If you encounter any issues when running an export of data from Costpoint to HRsmart, use the steps in this section to fix or get more information about the issue:

### Verify HRsmart Connection Information

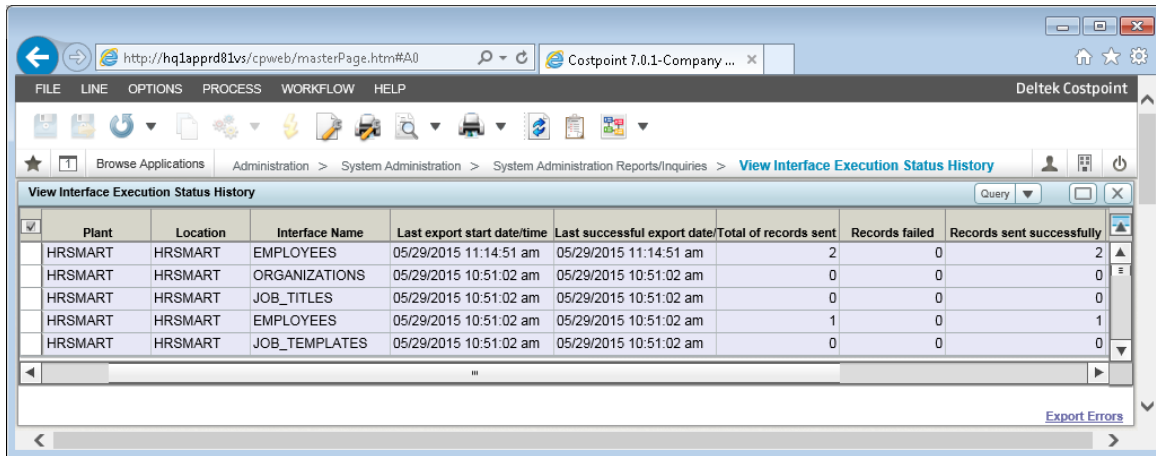
1. Open the Costpoint Configuration Utility and click **Costpoint** tab » **HRsmart** tab and check if the existing connection settings are correct.
2. Click on **Test** to check the connection. A message that says "Connected" should display.





## Check Errors on the View Interface Execution Status History Screen

In Costpoint, go to **Administration » System Administration » System Administration Reports/Inquiries » View Interface Execution Status History** screen to see if there were errors in sending the data to HRsmart.



Plant	Location	Interface Name	Last export start date/time	Last successful export date	Total of records sent	Records failed	Records sent successfully
HRSMART	HRSMART	EMPLOYEES	05/29/2015 11:14:51 am	05/29/2015 11:14:51 am	2	0	2
HRSMART	HRSMART	ORGANIZATIONS	05/29/2015 10:51:02 am	05/29/2015 10:51:02 am	0	0	0
HRSMART	HRSMART	JOB_TITLES	05/29/2015 10:51:02 am	05/29/2015 10:51:02 am	0	0	0
HRSMART	HRSMART	EMPLOYEES	05/29/2015 10:51:02 am	05/29/2015 10:51:02 am	1	0	1
HRSMART	HRSMART	JOB_TEMPLATES	05/29/2015 10:51:02 am	05/29/2015 10:51:02 am	0	0	0



For more information, please refer to the [Monitoring the Status of HRsmart Integrations](#) section.

# HRsmart to Costpoint Integration

## Overview

The integration from HRsmart to Costpoint currently consists of new hires information. Costpoint will take the data provided by HRsmart and potentially populate fields in the following Costpoint tables:

- **DFLT\_REG\_TS** – Employee Regular Timesheet Defaults
- **EMPL** – Employee
- **EMPL\_LAB\_INFO** – Employee Salary/Labor Info
- **EMPL\_PHONE** – Employee Phone
- **EMPL\_TAX** – Employee Tax

Besides the values coming directly from HRsmart, there are other fields which will default from other sources which can include the optional CP Job Template.

## Data Mapping

### New Hire

Below is a table that shows the sources of the employee data:

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
DFLT_REG_TS	ACCT_ID	Account ID	CP Job Template
DFLT_REG_TS	CHG_ORG_ID	Charge Organization ID	req_department_code
DFLT_REG_TS	EMPL_ID	Employee ID	user_employee_id
DFLT_REG_TS	GENL_LAB_CAT_CD	General Labor Category (GLC)	CP Job Template, Hardcoded
DFLT_REG_TS	LAB_LOC_CD	Labor Location	CP Job Template
DFLT_REG_TS	PAY_TYPE	Pay Type	CP Job Template, CP Company Default
DFLT_REG_TS	PROJ_ID	Project	CP Job Template
DFLT_REG_TS	REF_STRUC_1_ID	Reference Number 1	CP Job Template
DFLT_REG_TS	REF_STRUC_2_ID	Reference Number 2	CP Job Template

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
DFLT_REG_TS	WORK_COMP_CD	Workers Compensation Code	CP Job Template; CP Company Default
EMPL	<CP Job Template ID>	CP Job Template	Custom Field
EMPL	ADJ_HIRE_DT	Adjusted Hire Date	N/A
EMPL	BADGE_GROUP	SFT Badge Group	CP Job Template
EMPL	BADGE_ID	SFT Badge ID	CP Job Template
EMPL	BIRTH_CITY_NAME	City of Birth	N/A
EMPL	BIRTH_COUNTRY_CD	Country of Birth	N/A
EMPL	BIRTH_DT	Birth Date	user_date_of_birth
EMPL	BIRTH_MAIL_STATE_DC	State/Province of Birth	N/A
EMPL	BLIND_FL	Blind flag	N/A
EMPL	CITY_NAME	City Name	user_city
EMPL	CLOCK_FL	SFT Clock User	CP Job Template
EMPL	COMPANY_ID	Company ID	req_company_code
EMPL	CONT_NAME_1	Contact Name 1	ESS
EMPL	CONT_NAME_2	Contact Name 2	ESS
EMPL	CONT_PHONE_1	Contact Phone Number 1	ESS
EMPL	CONT_PHONE_2	Contact Phone Number 2	ESS
EMPL	CONT_REL_1	Contact 1, Relationship to Employee	ESS
EMPL	CONT_REL_2	Contact 2, Relationship to Employee	ESS
EMPL	CONTRACTOR_FL	Subcontractor?	CP Job Template, Detail

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
			Job Title
EMPL	COUNTRY_CD	Country Code	user_country_abbreviation
EMPL	DISABLED_FL	Disabled?	"N"
EMPL	ELIG_AUTO_PAY_FL	Eligible for auto pay?	"N"
EMPL	EMAIL_ID	Electronic Mail ID	N/A
EMPL	EMPL_ID	Employee ID	user_employee_id
EMPL	EMPL_SOURCE_CD	Employee Source	"HRSMART"
EMPL	FIRST_NAME	First Name	user_firstname
EMPL	HOME_EMAIL_ID	Home E-mail Address	user_email
EMPL	LAST_FIRST_NAME	Employee Name (Last/First/Mid)	Calculated
EMPL	LAST_NAME	Last Name	user_lastname
EMPL	LAST_REVIEW_DT	Last Review Date	N/A
EMPL	LN_1_ADR	Address Line 1	user_address_one
EMPL	LN_2_ADR	Address Line 2	user_address_two
EMPL	LN_3_ADR	Address Line 3	user_address_three
EMPL	LOCATOR_CD	Locator Code	CP Job Template
EMPL	LOGIN_ID	SFT Login ID	N/A
EMPL	LV_PD_CD	Leave Cycle	CP Job Template
EMPL	MAIL_STATE_DC	Mail State	user_state_abbreviation
EMPL	MARITAL_CD	Marital Code	"U"
EMPL	MES_FL	MES User?	CP Job Template
EMPL	MGR_EMPL_ID	Manager	manager_employee_id
EMPL	MID_NAME	Middle Name	user_middlename

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
EMPL	MOS_REVIEW_NO	Months Between Reviews	N/A
EMPL	NAME_PRFX_CD	Name Prefix Code	N/A
EMPL	NAME_SFX_CD	Name Suffix Code	N/A
EMPL	NEXT_REVIEW_DT	Next Review Date	N/A
EMPL	NOTES	Notes	N/A
EMPL	ORIG_HIRE_DT	Original Hire Date	candidate_hire_date
EMPL	PLANT_ID	Plant ID	CP Job Template
EMPL	POSTAL_CD	Postal Code	user_zipcode
EMPL	PR_SERV_EMPL_ID	Payroll Service Employee ID	N/A
EMPL	PREF_NAME	Preferred Name	N/A
EMPL	S_EMPL_STATUS_CD	Employee Status Code	"ACT"
EMPL	S_RACE_CD	Employee's Race Code	user_eeoc_race
EMPL	SEX_CD	Sex Code	user_eeoc_gender
EMPL	SFT_FL	Shop Floor Time User	CP Job Template
EMPL	SPVSR_NAME	Supervisor Name	CP Job Template
EMPL	SSN_ID	Social Security Number	national_identifier or "999-99-9999"
EMPL	TAXBLE_ENTITY_ID	Taxable Entity (Company ID)	Custom Field
EMPL	TIME_ENTRY_TYPE	Time Entry Type	CP Job Template, "PUNCHED"
EMPL	TS_PD_CD	Timesheet Period Code	CP Job Template
EMPL	TS_PD_REG_HRS_NO	Timesheet Period	0

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
		Regular Hours	
EMPL	UNION_EMPL_FL	Union Employee Flag (Y/N)	CP Job Template, "N"
EMPL	UNIT_AMT	Unit Amount	0
EMPL	VET_RELEASE_DT	Active military duty discharge or release date	N/A
EMPL	VET_STATUS_A	Vet Status Armed Forces	user_eeoc_veteran
EMPL	VET_STATUS_D	Vet Status Disabled	user_eeoc_veteran
EMPL	VET_STATUS_O	Other Eligible Veteran	user_eeoc_veteran
EMPL	VISA_DT	Visa Expiration Date	N/A
EMPL	VISA_TYPE_CD	Visa Type Code	N/A
EMPL_LAB_INF O	AA_COMMENTS	Comments	N/A
EMPL_LAB_INF O	AFF_PLAN_CD	AA Plan Code	CP Job Template, Taxable Entity/Labor Location Default
EMPL_LAB_INF O	ANNL_AMT	Annual Amount	offer_salary or position_salary
EMPL_LAB_INF O	BILL_LAB_CAT_CD	Project Labor Category (PLC)	CP Job Template
EMPL_LAB_INF O	COMMENTS	Comments	N/A
EMPL_LAB_INF O	COMP_PLAN_CD	Compensation Plan Code	Manage Compensation Plan Defaults, Manage Détail Position Descriptions, Configure Compensation Settings
EMPL_LAB_INF O	CORP_OFCCR_FL	Corporate Officer Flag (Y/N)	CP Job Template, Detail Job Title

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
EMPL_LAB_INF O	DETL_JOB_CD	Detail Job Code	job_code or CP Job Template
EMPL_LAB_INF O	DFLT_RT_GRP_ID	Default Rate Group	CP Job Template
EMPL_LAB_INF O	EFFECT_DT	Effective Date	candidate_hire_date
EMPL_LAB_INF O	EMPL_CLASS_CD	Employee Class Code	CP Job Template
EMPL_LAB_INF O	EMPL_ID	Employee ID	user_employee_id
EMPL_LAB_INF O	END_DT	End Date	"12/31/2078"
EMPL_LAB_INF O	EXMPT_FL	Exempt Flag (Y/N)	user_status or CP Job Template
EMPL_LAB_INF O	GENL_LAB_CAT_CD	General Labor Category (GLC)	CP Job Template, First Valid
EMPL_LAB_INF O	HIRE_DT_FL	Effective Hire Date Flag (Y/N)	"Y"
EMPL_LAB_INF O	HOME_REF1_ID	Home Reference 1	CP Job Template
EMPL_LAB_INF O	HOME_REF2_ID	Home Reference 2	CP Job Template
EMPL_LAB_INF O	HR_ORG_ID	HR organization ID	CP Job Template
EMPL_LAB_INF O	HRLY_AMT	Hourly Rate	offer_salary or position_salary
EMPL_LAB_INF O	JOB_GROUP_CD	Job Group	CP Job Template
EMPL_LAB_INF O	LAB_GRP_TYPE	Labor Group Type	CP Job Template
EMPL_LAB_INF O	LAB_LOC_CD	Labor Location	CP Job Template
EMPL_LAB_INF	MGR_EMPL_ID	Evaluating	manager_id or CP Job

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
O		Managers Employee ID	Template
EMPL_LAB_INF O	ORG_ID	Org ID	req_department_code
EMPL_LAB_INF O	PERS_ACT_RSN_CD	Personnel Action Reason	CP Job Template
EMPL_LAB_INF O	PERS_ACT_RSN_CD_2	Personnel Action Reason 2	N/A
EMPL_LAB_INF O	PERS_ACT_RSN_CD_3	Personnel Action Reason 3	N/A
EMPL_LAB_INF O	REASON_DESC	Reason Description	CP Job Template or Personnel Action table
EMPL_LAB_INF O	REASON_DESC_2	Reason Description 2	N/A
EMPL_LAB_INF O	REASON_DESC_3	Reason Description 3	N/A
EMPL_LAB_INF O	REVIEW_FORM_ID	Review Form ID	CP Job Template
EMPL_LAB_INF O	S_EMPL_TYPE_CD	Employee Type Code	job_type or CP Job Template
EMPL_LAB_INF O	S_HRLY_SAL_CD	Hourly or Salary Code	requisition_position_type or CP Job Template
EMPL_LAB_INF O	S_STEP_NO	Step Number Values 1-10	CP Job Template
EMPL_LAB_INF O	SAL_AMT	Salary Amount	offer_salary or position_salary
EMPL_LAB_INF O	SAL_GRADE_CD	Salary Grade Code	Functional Job Title via CP Job Template
EMPL_LAB_INF O	SEASON_EMPL_FL	Seasonal Employee	CP Job Template, Hardcoded
EMPL_LAB_INF O	SEC_ORG_ID	Security Organization ID	CP Job Template, Org
EMPL_LAB_INF	STD_EFFECT_AMT	Standard Effective	N/A



Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
O		Hourly Rate	
EMPL_LAB_INF O	STD_EST_HRS	Standard Estimated Annual Hours	CP Job Template
EMPL_LAB_INF O	TC_TS_SCHED_CD	TC Timesheet Schedule	CP Job Template
EMPL_LAB_INF O	TC_WORK_SCHED_CD	TC Work Schedule	CP Job Template, Labor Settings
EMPL_LAB_INF O	TITLE_DESC	Position Title	job_title, Detail Job Titles table, or CP Job Template
EMPL_LAB_INF O	TRN_CRNCY_CD	Currency	CP Job Template, GL Settings
EMPL_LAB_INF O	WORK_STATE_CD	Overtime State Code (for OT Calculations)	user_state_abbreviation
EMPL_LAB_INF O	WORK_YR_HRS_NO	Work Hours in Year	CP Job Template
EMPL_PHONE	PHONE_EXT_CD	Phone Number	N/A
EMPL_PHONE	PHONE_EXT_CD	Phone Number	N/A
EMPL_PHONE	PHONE_ID	Phone Number	phone_home or phone_work or phone_mobile or phone_pager or phone_fax
EMPL_PHONE	SEQ_NO	Sequence Number	Calculated
EMPL_TAX	AEIC_EXMPT_NO	AEIC Exemption Number	N/A
EMPL_TAX	AEIC_OVRIDE_AMT	AEIC Override Amount	N/A
EMPL_TAX	AR_SEAS_EMPL	Arkansas Seasonal Employee Code	N/A
EMPL_TAX	CLASS_CD	Class Code	N/A

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
EMPL_TAX	CORP_OFCCR_ID	Corporate Officer ID	N/A
EMPL_TAX	COVG_TYPE	Coverage Type	N/A
EMPL_TAX	DSLE_ESS_W4_FL	Disable ESS W-4 Flag	N/A
EMPL_TAX	EE_ER_RELATION_CD	Employee/Employee Relationship	N/A
EMPL_TAX	EMPL_ID	Employee ID	user_employee_id
EMPL_TAX	FED_ADDTL_AMT	Federal Additional Withholding Amount	ESS
EMPL_TAX	FED_EXMPT_NO	Number of Federal Withholding Exemption Claimed	ESS
EMPL_TAX	FED_OVRIDE_AMT	Federal Withholding Override Amount	N/A
EMPL_TAX	FED_OVRIDE_PCT	Federal Override Percent	N/A
EMPL_TAX	FUTA_TXBL_FL	Federal Unemployment Tax Flag (Y/N)	N/A
EMPL_TAX	FUTURE_TXBL_FL	Future Use Flag (Y/N)	N/A
EMPL_TAX	LC1_OVRIDE_PCT	Local 1 Override Percent	N/A
EMPL_TAX	LC2_OVRIDE_PCT	Local 2 Override Percent	N/A
EMPL_TAX	LC3_OVRIDE_PCT	Local 3 Override Percent	N/A
EMPL_TAX	LC4_OVRIDE_PCT	Local 4 Override Percent	N/A
EMPL_TAX	LC5_OVRIDE_PCT	Local 5 Override Percent	N/A

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
EMPL_TAX	LOC1_ADDTL_AMT	Locality 1 Additional Withholding Amount	N/A
EMPL_TAX	LOC1_CREDIT_NO	Locality 1 Number of Credits Claimed	N/A
EMPL_TAX	LOC1_DEPEND_NO	Locality 1 Number of Dependents Claimed	N/A
EMPL_TAX	LOC1_EXMPT_NO	Locality 1 Number of Exemptions Claimed	N/A
EMPL_TAX	LOC1_OVERRIDE_AMT	Locality 1 Withholding Override Claimed	N/A
EMPL_TAX	LOC2_ADDTL_AMT	Locality 2 Additional Withholding Amount	N/A
EMPL_TAX	LOC2_CREDIT_NO	Locality 2 Number of Credits Claimed	N/A
EMPL_TAX	LOC2_DEPEND_NO	Locality 2 Number of Dependents Claimed	N/A
EMPL_TAX	LOC2_EXMPT_NO	Locality 2 Number of Exemptions Claimed	N/A
EMPL_TAX	LOC2_OVERRIDE_AMT	Locality 2 Withholding Override Claimed	N/A
EMPL_TAX	LOC3_ADDTL_AMT	Locality 3 Additional Withholding Amount	N/A
EMPL_TAX	LOC3_CREDIT_NO	Locality 3 Number of Credits Claimed	N/A
EMPL_TAX	LOC3_DEPEND_NO	Locality 3 Number	N/A

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
		of Dependents Claimed	
EMPL_TAX	LOC3_EXMPT_NO	Locality 3 Number of Exemptions Claimed	N/A
EMPL_TAX	LOC3_OVRIDE_AMT	Locality 3 Withholding Override Claimed	N/A
EMPL_TAX	LOC4_ADDTL_AMT	Locality 4 Additional Withholding Amount	N/A
EMPL_TAX	LOC4_CREDIT_NO	Locality 4 Number of Credits Claimed	N/A
EMPL_TAX	LOC4_DEPEND_NO	Locality 4 Number of Dependents Claimed	N/A
EMPL_TAX	LOC4_EXMPT_NO	Locality 4 Number of Exemptions Claimed	N/A
EMPL_TAX	LOC4_OVRIDE_AMT	Locality 4 Withholding Override Claimed	N/A
EMPL_TAX	LOC5_ADDTL_AMT	Locality 5 Additional Withholding Amount	N/A
EMPL_TAX	LOC5_CREDIT_NO	Locality 5 Number of Credits Claimed	N/A
EMPL_TAX	LOC5_DEPEND_NO	Locality 5 Number of Dependents Claimed	N/A
EMPL_TAX	LOC5_EXMPT_NO	Locality 5 Number of Exemptions Claimed	N/A
EMPL_TAX	LOC5_OVRIDE_AMT	Locality 5 Withholding	N/A

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
		Override Claimed	
EMPL_TAX	MAIL_STATE_DC	Tax State	user_state_abbreviation
EMPL_TAX	MEDICR_TXBL_FL	Medicare Taxable Flag (Y/N)	N/A
EMPL_TAX	MN_WORKSITE_NO	Minnesota worksite number	N/A
EMPL_TAX	MO_PROBATION_FL	MO Probationary Flag	N/A
EMPL_TAX	NE_MIN_WH_FL	Exempt from Nebraska Minimum Withholding	N/A
EMPL_TAX	NRA_FL	Nonresident Alien Flag	N/A
EMPL_TAX	OWNER_FL	Owner Flag	N/A
EMPL_TAX	PA_PSD_CD	Pennsylvania Resident PSD Code	N/A
EMPL_TAX	PA_WORK_PSD_CD	Pennsylvania Work Location PSD Code	N/A
EMPL_TAX	PAY_PD_CD	Pay Cycle Code	CP Job Template; CP Company Default
EMPL_TAX	PENSION_PLAN_FL	Pension Plan Covered Flag (Y/N)	N/A
EMPL_TAX	S_AEIC_FIL_STAT_CD	Filing Status AEIC Code	N/A
EMPL_TAX	S_AK_GEO_CD	Geographic Code	N/A
EMPL_TAX	S_AK_OCC_CD	Alaska Occupational Code	N/A
EMPL_TAX	S_FED_WH_MTHD_CD	Filing Status Fed Tax Withholding Method Code	N/A
EMPL_TAX	S_LOC1_FIL_STAT_CD	Filing Status	N/A

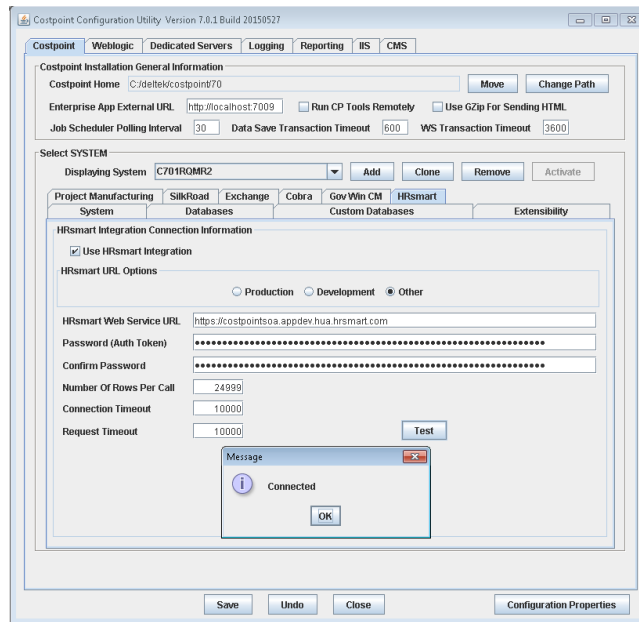
Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
		Locality 1 Code	
EMPL_TAX	S_LOC2_FIL_STAT_CD	Filing Status Locality 2 Code	N/A
EMPL_TAX	S_LOC3_FIL_STAT_CD	Filing Status Locality 3 Code	N/A
EMPL_TAX	S_LOC4_FIL_STAT_CD	Filing Status Locality 4 Code	N/A
EMPL_TAX	S_LOC5_FIL_STAT_CD	Filing Status Locality 5 Code	N/A
EMPL_TAX	S_ST_FIL_STAT_CD	State Filing Status Code	ESS
EMPL_TAX	ST_ADDTL_AMT	State Additional Withholding Amount	ESS
EMPL_TAX	ST_CREDIT_NO	State Number of Credits Claimed	ESS
EMPL_TAX	ST_DEPEND_NO	State Number of Dependents Claimed	ESS
EMPL_TAX	ST_EXMPT_NO	State Number of Exemptions Claimed	ESS
EMPL_TAX	ST_OVRIDE_AMT	State Withholding Override Amount	N/A
EMPL_TAX	ST_OVRIDE_PCT	State Override Percent	N/A
EMPL_TAX	SUTA_STATE_CD	State Unemployment Tax State Code	N/A
EMPL_TAX	SUTA_TXBL_FL	Subject to SUTA	N/A
EMPL_TAX	TAX_SVC_GRP_ID	Payroll Tax Service Group ID	N/A
EMPL_TAX	US_CITIZEN_STAT_CD	U.S Citizenship Status Code	N/A

Costpoint Destination Table	Costpoint Destination Field	Costpoint Field Description	HRsmart/Default Source
EMPL_TAX	VET_EXMPT_FL	Puerto Rico Veteran Exemption Flag	N/A
EMPL_TAX	WAGE_PLN_CD	Wage Plan Code	N/A
EMPL_TAX	WH_LOC1_CD	Withholding Locality 1 Code	N/A
EMPL_TAX	WH_LOC2_CD	Withholding Locality 2 Code	N/A
EMPL_TAX	WH_LOC3_CD	Withholding Locality 3 Code	N/A
EMPL_TAX	WH_LOC4_CD	Withholding Locality 4 Code	N/A
EMPL_TAX	WH_LOC5_CD	Withholding Locality 5 Code	N/A
EMPL_TAX	WH_STATE_CD	Withholding State Code	N/A

## Troubleshooting

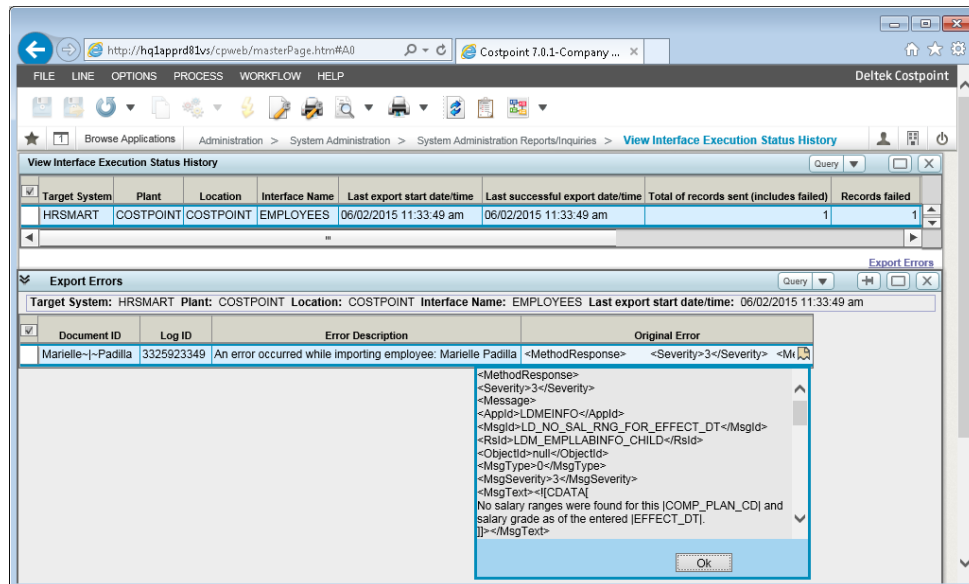
### Verify HRsmart Connection Information

1. Open the Costpoint Configuration Utility and click **Costpoint** tab » **HRsmart** tab and check if the existing connection settings are correct.
2. Click on **Test** to check the connection. A message that says "Connected" should display.



## Check Errors on the View Interface Execution Status History Screen

1. In Costpoint, go to **Administration » System Administration » System Administration Reports/Inquiries » View Interface Execution Status History** screen to see if there were errors in importing employee data from HRsmart.
2. Click on the Export Errors subtask to view the employee records that failed to be imported to Costpoint.
3. For each employee row, click the note icon in the **Original Error** field to view the errors that caused the employee record not to be imported into Costpoint.



For more information, please refer to the [Monitoring the Status of HRsmart Integrations](#) section.



## Check Errors in HRsmart Integration Log File

1. On your Costpoint Application server, go to the log folder in the Costpoint installation directory (for example, C:\Delttek\costpoint\70\logs).
2. Locate the HRsmart Integration log file (filename: **CP\_INT\_HRSMART\_DEServer.log**) and open the file with a text editor (for example, Notepad). This log will contain all errors related to the HRsmart integration. Errors are displayed at the end of the log file within the "Response" XML.

The following is an example of the information in the log file:

CP_INT_HRSMART_DEServer.log
<pre>(Jun 02 2015 20:33:01:[[ACTIVE] ExecuteThread: '0' for queue: 'weblogic.kernel.Default (self-tuning)']: ERROR com.delttek.enterprise.DEServer2.INT.HRSMART.C701RQ011 ) CommonInterfaceImpl.java - Log Id: 3329158174 'EMPLOYEES' synch process received error after submitting document to the COSTPOINT(COSTPOINT) .  -----Request-----  &lt;LDMEINFO EMPL&gt;&lt;ACCT_ID&gt;&lt;ACCT_ID&gt;&lt;ADJ_HIRE_DT&gt;&lt;ADJ_HIRE_DT&gt;&lt;BADGE _GROUP&gt;&lt;BADGE_GROUP&gt;&lt;BADGE_ID&gt;&lt;BADGE_ID&gt;&lt;BIRTH_DT&gt;1984-08-10 00:00:00.0&lt;BIRTH_DT&gt;&lt;BLIND_FL&gt;&lt;BLIND_FL&gt;&lt;CHG_ORG_ID&gt;1.1.124&lt;CHG_O RG_ID&gt;&lt;CITY_NAME&gt;Ramsey&lt;CITY_NAME&gt;&lt;CONT_NAME_1&gt;&lt;CONT_NAME_1&gt;&lt;CONT _NAME_2&gt;&lt;CONT_NAME_2&gt;&lt;CONT_PHONE_1&gt;&lt;CONT_PHONE_1&gt;&lt;CONT_PHONE_2&gt;&lt;CONT _PHONE_2&gt;&lt;CONT_REL_1&gt;&lt;CONT_REL_1&gt;&lt;CONT_REL_2&gt;&lt;CONT_REL_2&gt;&lt;COU NTRY_CD&gt;USA&lt;COUNTRY_CD&gt;&lt;DEFAULT_FL&gt;&lt;DEFAULT_FL&gt;&lt;DFLT_AUTOADJ_RT&gt;&lt;DFLT _AUTOADJ_RT&gt;&lt;DFLT_MES_FL&gt;&lt;DFLT_MES_FL&gt;&lt;DFLT_SFT_FL&gt;&lt;DFLT_SFT _FL&gt;&lt;DISABLED_FL&gt;&lt;DISABLED_FL&gt;&lt;EMAIL_ID&gt;&lt;EMAIL_ID&gt;&lt;EMPL_ID&gt;AFCHRC PO09&lt;EMPL_ID&gt;&lt;EMPL_NAME&gt;&lt;EMPL_NAME&gt;&lt;EMPL_SOURCE_CD&gt;HRSMART&lt;EMPL_S OURCE_CD&gt;&lt;ESS_COS_DESC&gt;&lt;ESS_COS_DESC&gt;&lt;FIRST_NAME&gt;Marielle&lt;FIRST_NA ME&gt;&lt;GENL_LAB_CAT_CD&gt;&lt;GENL_LAB_CAT_CD&gt;&lt;HOME_EMAIL_ID&gt;mpadilla@yahoo. com&lt;HOME_EMAIL_ID&gt;&lt;HRSMART_EXPORT_DT&gt;&lt;HRSMART_EXPORT_DT&gt;&lt;LAB_LOC_C D&gt;&lt;LAB_LOC_CD&gt;&lt;LAST_FIRST_NAME&gt;&lt;LAST_FIRST_NAME&gt;&lt;LAST_NAME&gt;Padill a&lt;LAST_NAME&gt;&lt;LAST_REVIEW_DT&gt;&lt;LAST_REVIEW_DT&gt;&lt;LN_1_ADR&gt;address one&lt;LN_1_ADR&gt;&lt;LN_2_ADR&gt;address two&lt;LN_2_ADR&gt;&lt;LOCATOR_CD&gt;&lt;LOCATOR_CD&gt;&lt;LOGIN_ID&gt;&lt;LOGIN_ID&gt;&lt;MAIL_S TATE_DC&gt;NJ&lt;MAIL_STATE_DC&gt;&lt;MARITAL_CD&gt;U&lt;MARITAL_CD&gt;&lt;MID_NAME&gt;Rodrigu ez&lt;MID_NAME&gt;&lt;NAME_PRFX_CD&gt;&lt;NAME_PRFX_CD&gt;&lt;NAME_SFX_CD&gt;&lt;NAME_SFX_C D&gt;&lt;NEXT_REVIEW_DT&gt;&lt;NEXT_REVIEW_DT&gt;&lt;NOTES&gt;&lt;NOTES&gt;&lt;ORIG_HIRE_DT&gt;201 5-06-02 00:00:00.0&lt;ORIG_HIRE_DT&gt;&lt;PLANT_NAME&gt;&lt;PLANT_NAME&gt;&lt;POSTAL_CD&gt;07446- 0506&lt;POSTAL_CD&gt;&lt;PREF_NAME&gt;&lt;PREF_NAME&gt;&lt;PRIR_NAME&gt;&lt;PRIR_NAME&gt;&lt;PROJ _ID&gt;&lt;PROJ_ID&gt;&lt;PR_SERV_EMPL_ID&gt;&lt;PR_SERV_EMPL_ID&gt;&lt;RACE_ETHNIC_DESC&gt; &lt;RACE_ETHNIC_DESC&gt;&lt;REF_STRUC_1_ID&gt;&lt;REF_STRUC_1_ID&gt;&lt;REF_STRUC_2_ID &gt;&lt;REF_STRUC_2_ID&gt;&lt;SEX_CD&gt;F&lt;SEX_CD&gt;&lt;SPVSR_NAME&gt;&lt;SPVSR_NAME&gt;&lt;SR_EX PORT_DT&gt;&lt;SR_EXPORT_DT&gt;&lt;SSN_ID&gt;999999999&lt;SSN_ID&gt;&lt;S_EMPL_STATUS_CD&gt;A CT&lt;S_EMPL_STATUS_CD&gt;&lt;S_ESS_COS_CD&gt;&lt;S_ESS_COS_CD&gt;&lt;S_FREQUENCY_CD&gt;&lt;S _FREQUENCY_CD&gt;&lt;S_RACE_CD&gt;U&lt;S_RACE_CD&gt;&lt;TAXBLE_ENTITY_ID&gt;1&lt;TAXBLE_E NTITY_ID&gt;&lt;TAX_SVC_GRP_ID&gt;&lt;TAX_SVC_GRP_ID&gt;&lt;TERM_DT&gt;&lt;TERM_DT&gt;&lt;VENDO R_ID&gt;&lt;VENDOR_ID&gt;&lt;VEND_CREATE_FL&gt;&lt;VEND_CREATE_FL&gt;&lt;VEND_EMPL_LNK_FL &gt;&lt;VEND_EMPL_LNK_FL&gt;&lt;VEND_PWD&gt;&lt;VEND_PWD&gt;&lt;VET_RELEASE_DT&gt;&lt;VET_REL EASE_DT&gt;&lt;VET_STATUS_A&gt;N&lt;VET_STATUS_A&gt;&lt;VET_STATUS_D&gt;N&lt;VET_STATUS_D&gt;&lt; VET_STATUS_O&gt;N&lt;VET_STATUS_O&gt;&lt;VET_STATUS_R&gt;&lt;VET_STATUS_R&gt;&lt;VET_STATU S_S&gt;&lt;VET_STATUS_S&gt;&lt;VET_STATUS_V&gt;&lt;VET_STATUS_V&gt;&lt;VISA_DT&gt;&lt;VISA_DT&gt; &lt;VISA_TYPE_CD&gt;&lt;VISA_TYPE_CD&gt;&lt;WORK_COMP_CD&gt;&lt;WORK_COMP_CD&gt;&lt;LDM_EMP LLABINFO_CHILD&gt;&lt;AA_COMMENTS&gt;&lt;AA_COMMENTS&gt;&lt;AFF_PLAN_CD&gt;&lt;AFF_PLAN_C D&gt;&lt;ANNL_AMT&gt;33000.00&lt;ANNL_AMT&gt;&lt;BILL_LAB_CAT_CD&gt;&lt;BILL_LAB_CAT_CD&gt;&lt;C ALC_FL&gt;&lt;CALC_FL&gt;&lt;COMMENTS&gt;&lt;COMMENTS&gt;&lt;COMP_PLAN_CD&gt;&lt;COMP_PLAN_CD &gt;&lt;CORP_OFCR_FL&gt;&lt;CORP_OFCR_FL&gt;&lt;DEFAULT_FL&gt;&lt;DEFAULT_FL&gt;&lt;DETL_JOB_CD</pre>

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## Monitoring the Status of HRsmart Integrations

The View Interface Execution Status History screen in Costpoint monitors all data integrations between Costpoint and other systems. You can use this screen to view the status of the following:

- Importing HRsmart new hire employee-related information into Costpoint.
- Exporting Costpoint employees, position requisitions, detail job titles, and organizations/HR organizations to HRsmart.

The screen can be accessed in the following Costpoint Location: **Administration » System Administration » System Administration Reports/Inquiries.**

If you run integrations with multiple systems, use the **Query** to filter HRsmart integrations from the list on the screen.

The View Interface Execution Status History screen displays the following information for every integration instance:

- Target System
- Plant
- Location
- Interface Name
- Last export start date/time
- Last successful export date/time
- Total of records sent (includes failed)
- Records failed
- Records sent successfully
- Time waited on Target System
- Total Run Time (sec)

## Guidelines for HRsmart Users

This section contains guidelines for using and setting up data in HRsmart in order to successfully run the data integration process the between Costpoint and HRsmart systems.

### Requisition

The following fields are required to be on the requisition form and values are **required** to be selected:

- Job Classification \*
- Exemption Status \*
- Job Type \*
- Taxable Entity



\* — These fields also require specific values. Those are detailed below in the “Drop-down Selection Values” section.

There will be another field on the requisition that is optional, labeled **CP Job Template ID**. If one is selected, then it will assist Costpoint in the defaulting of particular data needed when the new hire is created in Costpoint.

### Drop-down Selection Values

The data **must** contain the only following corresponding values. These values should be spelled exactly as specified in following table. These values may be configured by your HRsmart Consultant.

Data	Allowed Values
<b>Job Classification</b>	Salaried Hourly Salaried Fluctuating
<b>Job Types</b>	Full-Time Part-Time Temporary
<b>Exemption Types</b>	Exempt Non-Exempt

Once the values are entered, these fields should be hidden so that they cannot be modified by anyone. Once hidden, they will no longer show on the Select List Management page.

### Salary

Costpoint requires the salary amount for the new hire; therefore, you must enter the amount at some point. There are three areas in the system where this can be entered:

- When initiating an offer
- When hiring the individual via the Résumé/CV Dashboard
- In the Cost Per Hire screen via Recent Hires

## Onboarding

You must use Onboarding. Many details that Costpoint needs are completed during Onboarding.

Some fields displayed in the Onboarding process are not required in the Enterprise system, **but are required for Costpoint**. Therefore, the following fields must be completed when a new hire is onboarded:

- Employee ID
- Date of Birth\* (if using Costpoint HR)
- Country\* if State is collected



\* — These can be collected and required at any point during the application process.

## Diversity Information

If you use Costpoint Human Resources (HR), the application requires the Race and Gender of the new hire. This information can be collected either during the application or Onboarding processes. They can be made required fields via **Administration » Diversity Data Collection**.

## Social Security Number

If you use Costpoint Human Resources (HR), the application requires the Social Security Number of the new hire. This information can be collected either during the account creation, application, or Onboarding processes. The field can be made required on either the job seeker's account creation form or the application.

## Org Structure

Data initialization will populate the Org Structure in HRsmart. The Org Level codes should **not** be modified under **any** circumstances.

Any changes done to the Names of the Org Levels will be overwritten by the integration because Costpoint is the master of the data. You must make changes to the Org Levels directly in Costpoint rather than in HRsmart. After updating the information in Costpoint, you must run an export to update HRsmart.

## Users


You must perform edits to Employee data in Costpoint.

If you are editing data that is not part of the integration (fields identified above in both New Hires and Users), you can update the data in Enterprise.

## Custom Fields

In this release, the following custom fields were added in HRsmart. They should be added to the requisition form by either a HRsmart Consultant or by your Site Administrator.

Field	Details
<b>Costpoint Job Template ID</b>	<p>This field <b>must</b> be added to the Requisitions form.</p> <p>Do <b>not</b> add to Costpoint Job Template ID values directly in HRsmart. Instead, use the export mechanism in Costpoint to update the listing in HRsmart.</p>
<b>Taxable Entity</b>	<p>This field <b>must</b> be added to the Requisitions form and made <b>required</b>. If not, the integration will fail.</p> <p>You <b>must</b> enter the values manually in HRsmart. The values will not be imported from Costpoint.</p>



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