Deltek Costpoint® 7.1.1

Deltek Resource Planning Integration

Technical Guide

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Contents

Overview

Costpoint 7.1.1 Deltek Resource Planning Integration provides you the ability to integrate employee, organization, project information between Costpoint and your Deltek Resource Planning installation. You can run the integration process through the Transfer Resource Planning Data screen in the Employee domain where the integration can be executed on demand. You can also opt to schedule to run the process at a certain time by using the Job Management applications in Costpoint.

This guide provides the mapping of information that the integration process uses when transferring data from Costpoint to Deltek Resource Planning. 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

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 – Deltek Resource Planning Integration Administrator.

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

Minimum System Requirements

Before performing your installation, make sure the following are installed, configured, and running in your system:

- Deltek Costpoint Version 7.1.1
- Costpoint 7.1.1 SYSTEM JAR 017 or latest release available

Application JAR Requirements

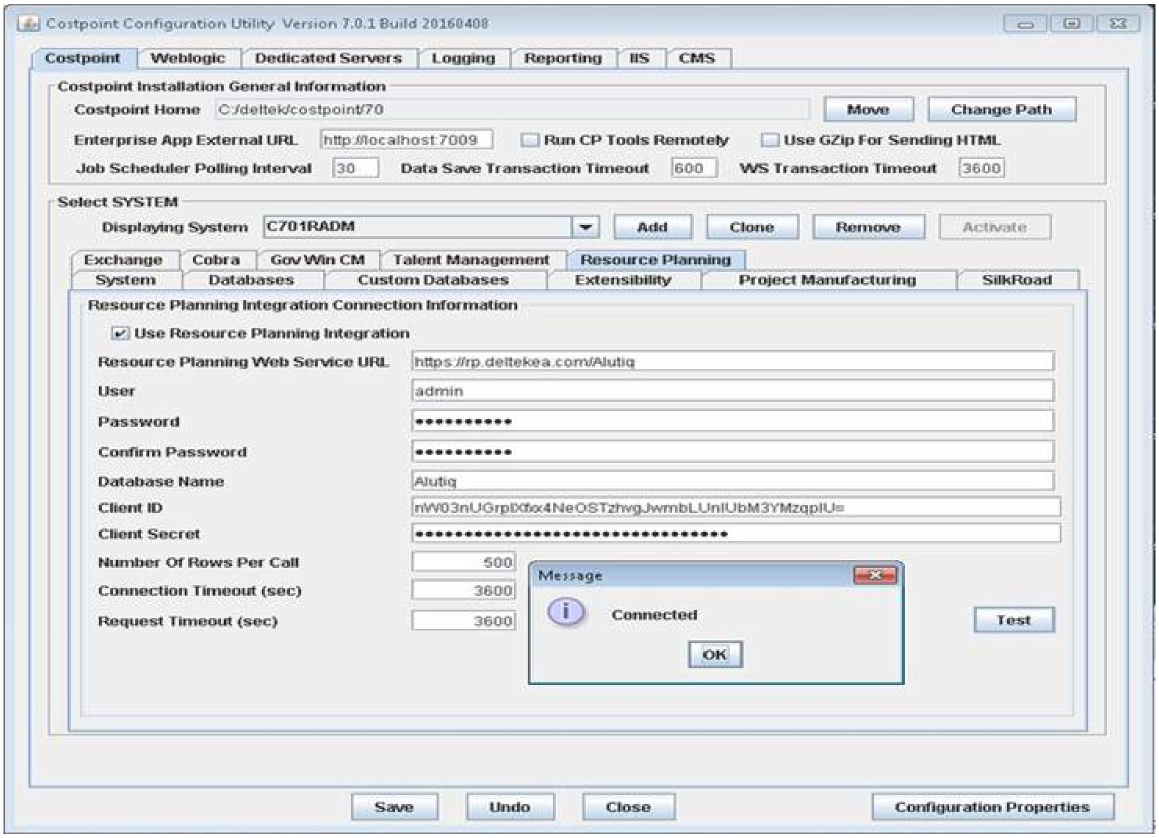
The following table shows the required application JAR version for each screen affected by this update:

Domain	Module	APP ID	Application Name	Application JAR
SC	SY	AOMVSEM	Configure Employee Options	cp711_aomvsem_001.jar or latest hotfix available
SC	SY	AOMVSOR	Configure Organization Options	cp711_aomvsor_001.jar or latest hotfix available
SC	SY	AOMVSPJ	Configure Project Options	cp711_aomvspj_001.jar or latest hotfix available
SC	SY	AOPRPDAT	Transfer Resource Planning Data	cp711_aoprpdat_001.jar or latest hotfix available

Integration Configuration

After you apply the required Costpoint System and Application JAR files, you must enable Resource Planning integration in the Costpoint Configuration Utility and enter the proper connection settings in order for Costpoint 7.1.1 Deltek Resource Planning Integration to work.

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



To configure the Costpoint – Deltek Resource Planning Integration connection settings, complete the following steps:

1. On your Costpoint application server, click **Start** » **All Programs** » **Costpoint 7.1.1** » **Start Costpoint 7.1.1 Config Utility**.
2. On the Select Your Configuration Options screen, make sure the **Costpoint Application Configuration** check box is selected and click **Next**. The check box is selected by default.
3. Open the Costpoint Configuration Utility and click **Costpoint** tab » **Resource Planning** tab.
4. Enter the Resource Planning Integration connection details in the following fields:
   - **Use Resource Planning Integration** — Select this check box to allow the integration.

- **Resource Planning Web Service URL** — Enter the web service site that you will use for integration.
- **User** — Enter the Resource Planning Admin user name.
- **Password** — Enter the password of the Resource Planning Admin user.
- **Confirm Password** — Re-enter the password of the Resource Planning Admin user.
- **Database Name** — Enter the Resource Planning database name. This value should be exactly the same as the value entered when logging on to Resource Planning. For example, include spaces and special characters in the value.
- **Client ID** — Enter the value entered in Resource Planning (**Configuration** » **Integrations & Imports** » **API Authorization** » **Client ID** field)
- **Client Secret** — Enter the value entered in Resource Planning (**Configuration** » **Integrations & Imports** » **API Authorization** » **Client Secret** field)
- **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 (sec)** –- Enter the time in seconds for Costpoint to wait for a connection before a time-out occurs.
- **Request Timeout** — Enter the time in seconds for Costpoint to wait for a response, after it sends a request, before a time-out occurs.

5. 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.

Integration Data Mapping

Overview

The integration from Costpoint to Deltek Resource planning utilizes available application programming interfaces (APIs) in Resource Planning. Within Costpoint the integration is performed in the Transfer Resource Planning Data application. This application can be run on demand or scheduled via process server.

This section of the guide provides information about mapping of data that used in the integration from Costpoint to Deltek Resource Planning. The integration data from Costpoint to Resource Planning consists of the following:

- Code Tables
- Organizations
- Employees
- Projects
- Historical Hours

Data Mapping

Code Tables

This data involves multiple tables in Costpoint which contain the following:

- Project Type
- General Labor Categories
- Labor Location
- Employee Suffix
- State
- Country
- Citizenship
- Degree
- Skills
- Skill Level
- Skill Years
- Professional Organizations
- Security Clearance

Resource Planning Table Name	Resource Planning Column Name	Costpoint Table Name	Costpoint Column Name
CFGEMDEGREE	Code	DEGREE	DEG_ID
CFGEMDEGREE	Description	DEGREE	DEG_DESC
CFGEMSKILL	Code	SKILL	SKILL_ID
CFGEMSKILL	Description	SKILL	SKILL_DESC
FW_CFGCountry	ISOCountryCode	COUNTRY	COUNTRY_CD

Resource Planning Table Name	Resource Planning Column Name	Costpoint Table Name	Costpoint Column Name
FW_CFGCOUNTRY	Country	COUNTRY	COUNTRY_NAME
CFGState	Code	STATE	STATE_CD
CFGState	Description	STATE	STATE_NAME
CFGMLocation	Code	LAB_LOCATION	LAB_LOC_CD
CFGMLocation	Description	LAB_LOCATION	LAB_LOC_DESC
CFGMRegistration	Code	PROF_ORG	PROF_ORG_ID
CFGMRegistration	Description	PROF_ORG	PROF_ORG_DESC
CFGEMRegistration	Code	H_FED_SECURITY	FED_SEC_ID
CFGEMRegistration	Description	H_FED_SECURITY	FED_SEC_DESC
BTLabCats	Category	GENL_LAB_CAT	GENL_LAB_CAT_CD
BTLabCats	Description	GENL_LAB_CAT	GENL_LAB_CAT_DESC
CFGCitizenship	Code	CITIZEN_STATUS	CITIZEN_STATUS_CD
CFGCitizenship	Description	CITIZEN_STATUS	CITIZEN_STATUS_DESC
CFGSuffix	Code	EMPL	NAME_SUFFIX_CD
CFGSuffix	Suffix	EMPL	NAME_SUFFIX_CD
CFGProjectType	Code	PROJ_TYPE	PROJ_TYPE_DC
CFGProjectType	Description	PROJ_TYPE	PROJ_TYPE_DC
CFGCredentialType	Code	N/A	Populated with ProfOrg and SecClr if those are selected for export
CFGCredentialType	Description	N/A	Populated with Professional Organizations and Security Clearance if those are selected for export
CFGSkillLevel	Code	H_SKILL_LVL	SKILL_LVL_CD

Resource Planning Table Name	Resource Planning Column Name	Costpoint Table Name	Costpoint Column Name
CFGSkillLevel	Description	H_SKILL_LVL	SKILL_LVL_DESC
CFGSkillUsage	Code	H_EMPL_SKILLS	SKILL_YR_NO
CFGSkillUsage	Description	H_EMPL_SKILLS	SKILL_YR_NO + 'year(s)'

Organization

Resource Planning organizations directly relate to Costpoint's organizations. Below is how the data is mapped to Resource Planning:

Resource Planning Table Name	Resource Planning Column Name	Costpoint Table Name	Costpoint Column Name
Organization	Org	ORG	ORG_ID
Organization	Name	ORG	ORG_NAME
Organization	Status (not added yet)	ORG	ACTIVE_FL

Employee

Resource Planning employee information is extracted from Costpoint's Employee (EMPL), Salary Information and History (EMPL_LAB_INFO) and Employee Phone (EMPL_PHONE) tables. Below is how the data is mapped to Resource Planning:

Resource Planning Table Name	Resource Planning Column Name	Costpoint Table Name	Costpoint Column Name
EM	Employee	EMPL	EMPL_ID
EM	LastName	EMPL	LAST_NAME
EM	MiddleName	EMPL	MIDDLE_NAME
EM	Firstname	EMPL	FIRST_NAME
EM	PreferredName	EMPL	PREF_NAME
EM	Suffix	EMPL	NAME_SUFFIX_CD
EM	Status	EMPL	S_EMPL_STATUS_CD
EM	Title	EMPL_LAB_INFO	TITLE_DESC

Resource Planning Table Name	Resource Planning Column Name	Costpoint Table Name	Costpoint Column Name
EM	Org	EMPL_LAB_INFO	ORG_ID
EM	WorkPhone	EMPL_PHONE	PHONE_ID
EM	MobilePhone	EMPL_PHONE	PHONE_ID
EM	Email	EMPL_PHONE	PHONE_ID
EM	HoursPerDay		
EM	HireDate	EMPL	ORIG_HIRE_DT
EM	TerminationDate	EMPL	TERM_DT
EM	Location	EMPL_LAB_INFO	LAB_LOC
EM	BillingCategory	EMPL_LAB_INFO	GENL_LAB_CAT_CD
EM	UtilizationRatio		
EM	Supervisor	EMPL_LAB_INFO	MGR_EMPL_ID

Project

Resource Planning project information is extracted from Costpoint's Project (PROJ) table. Below is how the data is mapped to Resource Planning:

Resource Planning Table Name	Resource Planning Column Name	Costpoint Table Name	Costpoint Column Name
RPPlan, RPTask	WBS1	PROJ	PROJ_ID
RPPlan, RPTask	OutlineNumber	PROJ	N/A
RPPlan, RPTask	RPPlan.PlanName RPTask.Name	PROJ	PROJ_NAME
RPPlan, RPTask	ProjMgr	PROJ	EMPL_ID
RPPlan, RPTask	ProjectType	PROJ	PROJ_TYPE_DC
RPPlan, RPTask	ChargeType	PROJ	PROJ_RPT_DC
RPPlan, RPTask	ClientID	PROJ	CUST_ID
CL	ClientID	PROJ	CUST_ID

Resource Planning Table Name	Resource Planning Column Name	Costpoint Table Name	Costpoint Column Name
CL	ClientName	CUST	CUST_NAME
RPPlan, RPTask	Org	PROJ	ORG_ID
RPPlan, RPTask	StartDate	PROJ	PROJ_START_DT
RPPlan, RPTask	EndDate	PROJ	PROJ_END_DT
RPPlan, RPTask	Status	PROJ	ACTIVE_FL

Historical Hours

Historical hours need to be added into Resource Planning database to show the number of hours spent by each employee on each project and calculate the Estimate at Completion for each project. The integration extracts this information from the Timesheet Line (TS_LN) and Timesheet Line History (TS_LN_HS) tables in Costpoint.

Resource Planning Table Name	Resource Planning Column Name	Costpoint Table Name	Costpoint Column Name
LD	Employee	TS_LN, TS_LN_HS	EMPL_ID
LD	WBS1	TS_LN, TS_LN_HS	PROJ_ID
LD	RegHrs	TS_LN, TS_LN_HS	ENTERED_HRS
LD	TransDate	TS_LN, TS_LN_HS	TS_DT
LD	OvtHrs	N/A	N/A

Troubleshooting

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

Verify Resource Planning Connection Information

To check if the connection between Costpoint and Deltek Resource Planning is functional, complete the following steps:

1. Open the Costpoint Configuration Utility and click **Costpoint** tab » **Resource Planning** 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 Resource Planning. Use this screen to monitor the status of exporting Costpoint information to Resource Planning.

If you run integrations with multiple systems, use the **Query** to filter Resource Planning 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)

Use the Export Errors subtask on the screen to view the list of errors for each record.

Clear Database Tables in Resource Planning

If you encounter problems with the data in the Deltek Resource Planning tables, you may need to clear out affected tables. Please contact Customer Care for information on this process.

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