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Deltek Costpoint 7.1.1 to GovWin Capture Management Integration (Web Service)

Technical Guide

February 16, 2017

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Overview

This manual provides a reference for administrators and users who are installing the Deltek Costpoint to GovWin Capture Management Integration for the first time and users who are upgrading to the latest version of the integration. IT professionals who will support integration packs or develop applications to interact with them will also benefit from this manual.

The Costpoint to GovWin Capture Management Integration applications allow you to set up mapping tables and establish parameter records used to export existing account, customer, employee, organization, project, vendor, rate, and cost data from Costpoint into GovWin Capture Management.

Using Capture Management Web Services

You can now leverage existing Capture Management web services to transfer information from Costpoint to GovWin Capture Management. You must have GovWin Capture Management version 7.3 and Costpoint 7.0.1 or greater to use this method.

This method of integration will enable you export data using the new Transfer GovWin Capture Management Data screen in Costpoint.

This technical guide **only** covers the configuration and setup for integration using Capture Management web services.

Using Deltek Connector

Integration using the Deltek Connector is the legacy approach of exporting information from Costpoint to GovWin Capture Management. Prior to this release, the integration was only possible through the Deltek Connector.

The integration between Costpoint and Capture Management that uses Deltek Connector will move to Sustaining Support six months after the new web services based integration is released.

Please refer to our standard support policy guidelines on the Deltek Customer Care site for more information.

If You Need Assistance

If you need assistance installing, implementing, or using the Costpoint or GovWin Capture Management, Deltek makes a wealth of information and expertise readily available to you.

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 portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- 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
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and hot fixes

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 https://deltek.custhelp.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 Deltek Costpoint to GovWin Capture Management Integration administrator.

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

Additional Documentation

The following table lists the additional Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Customer Care Connect site.

Document Name	Description
Deltek Costpoint 7.1.1 to GovWin Capture Management Integration (Web Service) Release Notes	This document contains the features in the Deltek Costpoint to GovWin Capture Management Integration release.
Deltek Costpoint 7.1.1 to GovWin Capture Management Integration (Web Service) Database Mapping Guide	These documents contain table information and processing details of applications available Costpoint that allows data integration to GovWin Capture Management.

Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, and sub-releases. You can access DSM directly or through the Deltek Customer Care site.

When you access DSM directly, you will be prompted to log on before you can access the application. If you access DSM from within the Deltek Customer Care site, you do not have to log on since you are already logged into the Customer Care site.

Accessing DSM Directly

To access Deltek Software Manager directly, complete the following steps:

1. Launch Deltek Software Manager (click **Start** » **Programs** » **Deltek** » **Costpoint** » **Deltek Software Manager**).
2. In the Deltek Software Manager logon dialog box, enter your Deltek Customer Care **User ID** and **Password**, and click **Logon**.
3. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.

   When you log on for the first time, Deltek Software Manager asks you to select a default folder where Deltek products are to be downloaded.

4. Use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.

   You can change this folder anytime in the Settings dialog box.

5. In the left pane of Deltek Software Manager, expand the Deltek product that you want to download, if it is not already expanded.
6. Select the product type that you want to download. Your options are **Complete**, **HotFix**, and **Sub-Release**.
7. In the table, select the check box that corresponds to the Deltek product that you want to download. The right pane displays a message stating that the product has been added to the download queue.

   To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

8. Click **Download** at the bottom of the left pane. Deltek Software Manager downloads the product to the folder that you selected.

Accessing DSM from within the Customer Care Connect Site

To access Deltek Software Manager from within the Customer Care Connect site, complete the following steps:

1. In your Web browser, go to https://deltek.custhelp.com.
2. Enter your Customer Care Connect **Username** and **Password**, and click **Log In.**
3. When the Customer Care Connect site displays, click the Product Downloads tab.

   You are automatically logged into Deltek Software Manager.
4. To select the folder where you want to download Deltek products, click **Settings** above the right pane of Deltek Software Manager.

   When you log on for the first time, Deltek Software Manager asks you to select a default folder where Deltek products are to be downloaded.
5. Use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.

   You can change this folder anytime in the Settings dialog box.
6. The left pane of Deltek Software Manager, expand the Deltek product that you want to download, if it is not already expanded.
7. Select the product type that you want to download. Your options are **Complete**, **HotFix**, and **Sub-Release**.
8. In the table, select the check box that corresponds to the Deltek product that you want to download. The right pane displays a message stating that the product has been added to the download queue.

   To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.
9. Click **Download** at the bottom of the left pane. Deltek Software Manager downloads the product to the folder that you selected.

DSM Documentation and Troubleshooting

- To view the online help for Deltek Software Manager, click here.
- To view a tutorial on how to use Deltek Software Manager, click here.
- To view more information on troubleshooting Deltek Software Manager, click here.

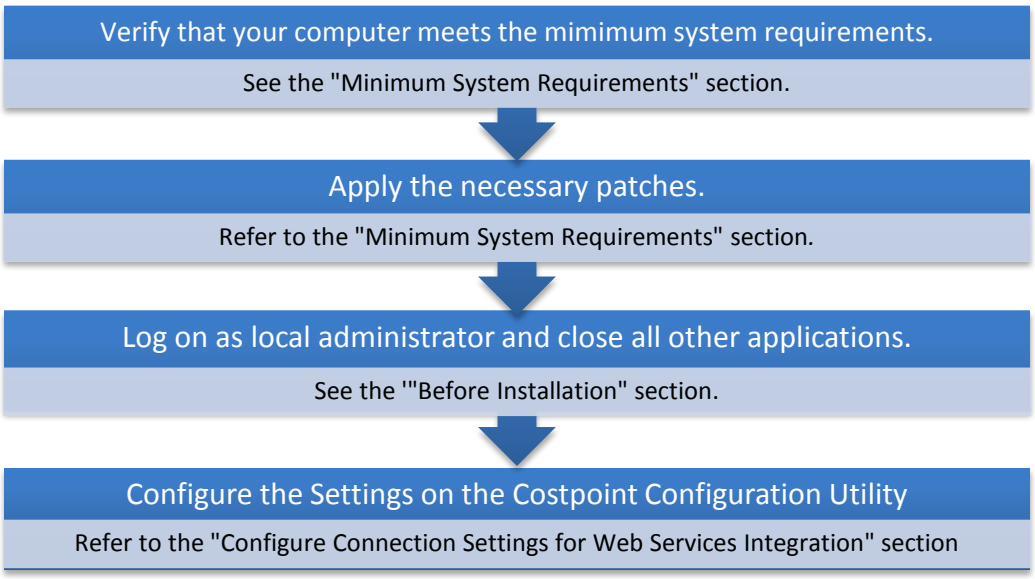
The above troubleshooting link will only work if you are logged into Deltek Customer Care Connect.

Integration Setup Overview

For Integration Using Web Services

This section provides a step-by-step overview of the entire process to successfully set up the Costpoint to GovWin Capture Management Integration to use Capture Management web services.

These steps only apply to non-SaaS integrations.



Minimum System Requirements

Before you begin installing the Costpoint to GovWin Capture Management Integration, verify that your computer meets the minimum system requirements for satisfactory operation. For higher performance, you can upgrade your physical memory to support your operating system and its applications.

When you open a process or transformation, all components are loaded into your computer's memory. A large, complex process may consume so much memory that it cannot execute. Where business processes permit, redesigning the process may resolve this issue.

Execute large, complex processes only on machines that have sufficient memory to load all components of the process while supporting the operating system and all other open applications.

Specific server hardware configurations may have an impact on your overall Deltek Costpoint and GovWin Capture Management licensing requirements. Deltek recommends that you confirm with Deltek Customer Care the server hardware you plan to deploy is in line with your Deltek license agreement and how overall server infrastructure expansion in the future may affect your Deltek licensing.

Software

Your machine must have the following software installed:

- Microsoft™ Windows® Server 2008 SP2 32-bit (x86) or 64-bit (x64) or Microsoft™ Windows® Server 2008 R2 SP1 operating system

  Deltek Costpoint to GovWin CRM Integration can run on 32-bit systems but Deltek recommends that you use 64-bit for optimum performance.

- Costpoint 7.0.1 or Costpoint 7.1.1

  If you use **Costpoint 7.0.1**, please refer to previously released Costpoint 7.0.1 to GovWin Capture Management documentation for hotfix requirements and integration setup.

- Costpoint Version 7.1.1 SYSTEM.ZIP (cp711_sys_017.jar or latest available)
- Deltek GovWin Capture Management 7.3 or higher with latest hotfix available

Database

You must have an Oracle or Microsoft SQL Server client with connectivity to the Costpoint and GovWin Capture Management databases configured and verified.

Before Installation

Read and consider the following precautions before beginning the installation process:

Log On as Local Administrator

You must log on as an administrator to ensure a successful installation. If you do not currently have those rights, contact your network administrator for assistance.

Close Down All Applications

Exit all programs before running the setup. This includes antivirus software, browsers, screen savers and all applications and processes that run in the background.

To exit all active programs, complete the following steps:

1. Close any background applications such as antivirus software, VPN, and instant messengers.
2. Press **Ctrl+Alt+Delete** and then click **Task Manager**.
3. In the Applications tab, select an application name from the list and click **End Task**.
4. Repeat step 3 until all applications are closed.

Configure Connection Settings for Web Services Integration

After applying the hotfixes and files listed in the Minimum System Requirements section, new and existing users must enter the proper connection settings in the Costpoint 7.1.1 Configuration Utility to enable integration using Capture Management web services.

To configure the Costpoint to GovWin Capture Management 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**.

   Due to enhanced security in Windows Server 2008, Deltek recommends that you use the **Run as Administrator** option when launching this command even when the logged in user has local administrative rights.

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. Click **Costpoint** tab » **GovWin CM** tab and enter the connection settings for the Costpoint to GovWin Capture Management Integration:
   - **Use GovWin CM Integration** — Select this check box to enable integration with GovWin Capture Management.
   - **GovWin CM Web Service URL** — Enter the URL for the GovWin Capture Management Web Service.

     For example, enter **http://SERVERNAME/vision/visionws.asmx**, where SERVERNAME is the name of your GovWin Capture Management application server.
   - **User** — Enter DELTEKCPINTEGRATION.

   You must enter the DELTEKCPINTEGRATION user ID in this field in order for the connection and integration to work properly. For the purposes of this integration, you must create a DELTEKCPINTEGRATION user account with FULL rights in GovWin Capture Management .

   - **Password** and **Confirm Password** — Enter and confirm the password of the DELTEKCPINTEGRATION user account.
   - **Database Name** — Enter the GovWin Capture Management database name.
   - **Number of Rows Per Call** — Default value is **100**. This indicates how many records are transformed before Costpoint sends them to GovWin Capture Management.
   - **Connection Timeout** — Default value is **10** seconds. This indicates the amount of time Costpoint will wait for GovWin Capture Management to respond during a connection.
   - **Request Timeout** — Default value is **10** seconds. This indicates the amount of time Costpoint will wait for GovWin Capture Management to respond when transferring data.
4. Click **Test** to check if the settings are correct.
5. When the **Connected** message displays, click **OK**.

6. Click **Save**, and then click **OK** on the screen to confirm that all changes were saved.
7. Click **Close**.
8. Restart all WebLogic servers or run the Rebuild Global Settings screen in Costpoint Administration to allow the changes to take effect.

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

Integration with Windows Authentication Enabled in GovWin Capture Management

If you plan to use GovWin Capture Management with Windows Authentication, or if you have Windows Authentication enabled in GovWin Capture Management, you will need to enable anonymous authentication using one of the following options to allow the transfer of data from Costpoint to GovWin CM:

Customers integrating with **GovWin CM SaaS**, where Windows Authentication is enabled, should contact **Deltek Customer Care** to initiate a service request with TBS to enable anonymous authentication using one of the options in this section.

Option 1: On the Internet Information Services (IIS) Manager, set ONLY the visionws.asmx page to anonymous authentication.

To perform this, complete the following steps:

1. Click **Start** » **Control Panel** » **System and Security** » **Administrative Tools** » **IIS Manager**.
2. In the Connections pane (left-side of the MMC console), expand the **(Computer Name)** » **Sites**, and then drill down to and left-click **Vision / GovWin CM Virtual Directory (Application)**.
3. On the right, the Workspace pane displays the Feature and Content Views that allow you to configure features for objects. Click the **Content View** option at the bottom. The file contents including the **visionws.asmx** file for the integration displays in the Workspace.
4. Right-click the **visionws.asmx** file and choose **Switch to Features View**. The file displays on the left side in the Connections pane.
5. Left-click the **visionws.asmx** file to select it.
6. On the Workspace pane, double-click the **Authentication** icon under the **IIS** group of objects.
7. Select **Anonymous Authentication**, then click the **Enable** option in the Actions pane on the right.
8. Select **Windows authentication**, then click the **Disable** option in the Actions pane on the right.

If you are using Windows authentication for that particular web service file (visionws.asmx) in Vision or other module, then you will have to perform **Option 2**.

Option 2: Set a copy of the visionws.asmx page to anonymous authentication.

In this option, you will need to rename a copy of the visionws.asmx page file and set the anonymous authentication on the copied file (and **not** on the original visionws.asmx). To perform this, complete the following steps:

1. Create a copy of the visionws.asmx page and rename the copied file to **CPtogovWinCRMIntegration_visionws.asmx** (or use a similar name).
2. Click **Start** » **Control Panel** » **System and Security** » **Administrative Tools** and launch the **IIS Manager**.

3. In the Connections pane (left-side of the MMC console), expand the (**Computer Name)** » **Sites**, and then drill down to and left-click **Vision / GovWin CM Virtual Directory (Application)**.
4. On the right, the Workspace pane displays the Feature and Content Views that allow you to configure features for objects. Click the **Content View** option at the bottom. The file contents including the **CPtogovWinCRMIntegration_visionws.asmx** (or similar) file for the integration displays in the Workspace.
5. Right-click the **CPtogovWinCRMIntegration_visionws.asmx** (or similar) file and choose **Switch to Features View**. The file displays on the left side in the Connections pane.
6. Left-click the **CPtogovWinCRMIntegration_visionws.asmx** (or similar) file to select it.
7. On the Workspace pane, double-click the **Authentication** icon under the **IIS** group of objects.
8. Select **Anonymous Authentication**, then click the **Enable** option in the Actions pane on the right.
9. Select **Windows authentication**, then click the **Disable** option in the Actions pane on the right.

Verifying User-Defined Fields

Several user-defined fields are required for the successful transfer of data from Costpoint to GovWin Capture Management. Before you run the integration process, you must first verify that these user-defined fields are present in the GovWin Capture Management database. If any of these fields are missing, you must add them using the User Defined-Fields maintenance application within GovWin Capture Management.

To avoid integration issues that are caused by missing fields, you must complete the steps in this section and verify the presence of user-defined fields in the GovWin Capture Management database. Deltek recommends that you perform this procedure whether you are integrating Costpoint with GovWin Capture Management for the first time or you already integrate data between Costpoint and GovWin Capture Management.

To verify the required user-defined fields, complete the following steps:

1. Use the SQL Management Studio or Interactive SQL tool to connect to the Costpoint Capture Management database.
2. Run the **Check Custom Columns SQL** script. The query result includes a detailed message on all missing required user-defined fields, if there are any. Refer to the following table for the correct SQL file to use for your Costpoint to GovWin Capture Management integration:

SQL Filename	Description
check_custom_columns_cp7x_cm7x.sql	Use this for Costpoint to GovWin Capture Management Integration (Web services).

3. In GovWin Capture Management (**Configuration** » **General** » **User-Defined-Fields**), add the missing fields manually.

See the next section, Required User-Defined Fields, for a list of the user-defined fields required to successfully transfer data from Costpoint to GovWin Capture Management.

Required User-Defined Fields

The following tables list the various user-defined fields required for transferring data from Costpoint to GovWin Capture Management.

Contacts (Custom Table: ContractCustomTabFields)

Field Name	Field Type (Form or Grid)	Data Type	Database Column Name
Cust Contact ID	Form	String	custCustContactID
Vend Contact ID	Form	String	custVendContactID

Employees (Custom Table: Employees_Affiliations)

Field Name	Field Type (Form or Grid)	Data Type	Database Column Name
Affiliation	Grid	String	custAffiliation
Member Date	Grid	Date	custMemberDate
Member Expiration	Grid	Date	custMemberExpiration
Member Years	Grid	Number	custMemberYears
Notes	Grid	Memo	custNotes

Projects (Custom Table: ProjectCustomTabFields)

Field Name	Field Type (Form or Grid)	Data Type	Database Column Name
ACOFaxID	Form	String	custACOFaxID
ACOName	Form	String	custACOName
ACOPhoneid	Form	String	custACOPhoneID
ARBalanceAmount	Form	ProjectCurrency	custARBalanceAmount
BaseEndDate	Form	Date	custBaseEndDate
COName	Form	String	custCOName
ContractEndDD	Form	String	custContractEndDD
ContractEndMM	Form	String	custContractEndMM
ContractStartDate	Form	Date	custContractStartDate
ContractStartDD	Form	String	custContractStartDD
ContractStartMM	Form	String	custContractStartMM
ContRepFaxID	Form	String	custContRepFaxID
ContRepName	Form	String	custContRepName
ContRepPhoneID	Form	String	custContRepPhoneID
ContRepTitle	Form	String	custContRepTitle
DirectLabor	Form	ProjectCurrency	custDirectLabor

Field Name	Field Type (Form or Grid)	Data Type	Database Column Name
DMSDPSCD	Form	String	custDMSDPSCD
FundSrceDesc	Form	String	custFundSrceDesc
ModFundedCostAmount	Form	ProjectCurrency	custModFundedCostAmount
ModFundedFeeAmount	Form	ProjectCurrency	custModFundedFeeAmount
ModFundedTotalAmount	Form	ProjectCurrency	custModFundedTotalAmount
ModsAtLowerLevels	Form	Numeric	custModsAtLowerLevels
ModsAtThisLevel	Form	Numeric	custModsAtThisLevel
ModValueCostAmount	Form	ProjectCurrency	custModValueCostAmount
ModValueFeeAmount	Form	ProjectCurrency	custModValueFeeAmount
ModValueTotalAmount	Form	ProjectCurrency	custModValueTotalAmount
OrigFundedCostAmount	Form	ProjectCurrency	custOrigFundedCostAmount
OrigFundedFeeAmount	Form	ProjectCurrency	custOrigFundedFeeAmount
OrigFundedTotalAmount	Form	ProjectCurrency	custOrigFundedTotalAmount
OrigValueCostAmount	Form	ProjectCurrency	custOrigValueCostAmount
OrigValueFeeAmount	Form	ProjectCurrency	custOrigValueFeeAmount
OrigValueTotalAmount	Form	ProjectCurrency	custOrigValueTotalAmount
OtherDirectCost	Form	ProjectCurrency	custOtherDirectCost
PCOName	Form	String	custPCOName
PerfPeriodEnd	Form	Date	custPerfPeriodEnd
PerfPeriodStart	Form	Date	custPerfPeriodStart
PONumber	Form	String	custPONumber
PrimeContractNumber	Form	String	custPrimeContractNumber
RevenueTypes	Form	String	custRevenueTypes
StmtOfWork	Form	Memo	custStmtOfWork
SubContractNumber	Form	String	custSubContractNumber

Field Name	Field Type (Form or Grid)	Data Type	Database Column Name
TotalBilledAmount	Form	ProjectCurrency	custTotalBilledAmount
TotalCostAmount	Form	ProjectCurrency	custTotalCostAmount
TotalFundedAmount	Form	ProjectCurrency	custTotalFundedAmount
TotalFundedCostAmount	Form	ProjectCurrency	custTotalFundedCostAmount
TotalFundedFeeAmount	Form	ProjectCurrency	custTotalFundedFeeAmount
TotalRevenueAmount	Form	ProjectCurrency	custTotalRevenueAmount
TotalValueAmount	Form	ProjectCurrency	custTotalValueAmount
TotalValueCostAmount	Form	ProjectCurrency	custTotalValueCostAmount
TotalValueFeeAmount	Form	ProjectCurrency	custTotalValueFeeAmount
ValuesAsOfDate	Form	Date	custValuesAsOfDate

Projects (Custom Table: Projects_Modifications)

Field Name	Field Type (Form or Grid)	Data Type	Database Column Name
Description	Grid	String	custDescription
EffectiveDate	Grid	Date	custEffectiveDate
EndDate	Grid	Date	custEndDate
FundedCostAmount	Grid	ProjectCurrency	custFundedCostAmount
FundedFeeAmount	Grid	ProjectCurrency	custFundedFeeAmount
FundedFeePercent	Grid	Numeric	custFundedFeePercent
ModDate	Grid	Date	custModDate
ModID	Grid	String	custModID
ModUser	Grid	String	custModUser
Notes	Grid	Memo	custNotes
Project	Grid	String	custProject
StartDate	Grid	Date	custStartDate

Field Name	Field Type (Form or Grid)	Data Type	Database Column Name
ValueCostAmount	Grid	ProjectCurrency	custValueCostAmount
ValueFeeAmount	Grid	ProjectCurrency	custValueFeeAmount
ValueFeePercent	Grid	Numeric	custValueFeePercent

Vendor (Custom Table: VendorCustomTabFields)

Field Name	Field Type (Form or Grid)	Data Type	Database Column Name
CertificationDate	Form	String	custCertificationDate
CertificationNumber	Form	String	custCertificationNumber
DefaultSize	Form	String	custDefaultSize
HUBZoneQualified	Form	CheckBox	custHUBZoneQualified
VendApprvlCode	Form	String	custVendApprvlCode

Integration Troubleshooting

The integration generates log files which contain informational, warnings, or error messages regarding the transformation and transfer of data. You can use the information in these log files to troubleshoot problems encountered during the integration. There are three types of log files for Costpoint to GovWin Capture Management Integration namely, process logs, object detail logs, and export logs.

Process Logs

Process logs contain informational, warnings, or error messages produced during the data transformation stage of the integration process. The location of the process logs is specified in the **Integration Process Log File Location** field on the Transfer GovWin Capture Management Data screen. The file name will be in the format:

<Parameter Name>_<Time Stamp>.log

The process log file contains the following parts:

- <**Object> Select Statement** — For each object being transferred, this section logs the Select Statement and the number of records read.
- **Source** — This section contains source records or raw data coming from Costpoint.
- **Target** — This section follows the Source section and it contains target records or transformed data that will be sent to GovWin Capture Management.

If the source record fails validation, a list of warning and error messages will follow instead of the Target record. Remediation steps are included for each warning and error message.

The **Log Type Suppression** group box on the Transfer GovWin Capture Management Data screen controls the information that will be included in the process logs. The following check boxes are available in the **Log Type Suppression** group box:

- **Informational message** — Select this check box to suppress the logging of the Select Statement, the Source Record, and the Target Record.
- **Warning messages** — Select this check box to suppress the logging of warning messages.
- **Error Messages** — Select this check box to suppress the logging of error messages.

Please see *Costpoint to GovWin Capture Management Integration Error Messages* topic in the Costpoint Online Help for a list of warning and error messages.

Process Log Example

The following is an example of the contents of a process log:

```
CLNT_CNTACT Select Statement:
--------------------------------------

    SELECT
        C.ADDR_DC AS ADDR_DC,
        C.CUST_ID AS CUST_ID,
```

```
    C.CNTACT_ID AS CNTACT_ID,
    C.CNTACT_FIRST_NAME AS CNTACT_FIRST_NAME,
    C.CNTACT_LAST_NAME AS CNTACT_LAST_NAME,
    C.CNTACT_TITLE_NAME AS CNTACT_TITLE_NAME,
    C.PHONE_ID AS PHONE_ID,
    C.OTH_PHONE_ID AS OTH_PHONE_ID,
    C.FAX_ID AS FAX_ID,
    C.NOTES AS NOTES,
    B.LN_1_ADDR AS LN_1_ADDR,
    B.LN_2_ADDR AS LN_2_ADDR,
    B.LN_3_ADDR AS LN_3_ADDR,
    B.S_BILL_ADDR_CD AS S_BILL_ADDR_CD,
    B.CITY_NAME AS CITY_NAME,
    B.MAIL_STATE_DC AS MAIL_STATE_DC,
    B.POSTAL_CD AS POSTAL_CD,
    CNTRY.ISO2_CD AS COUNTRY_ISO2_CD
FROM
    CUST_ADDR_CNTACT C
JOIN
    CUST A
        ON     C.CUST_ID = A.CUST_ID
        AND C.COMPANY_ID = A.COMPANY_ID
JOIN
    CUST_ADDR B
        ON     C.CUST_ID = A.CUST_ID
        AND C.ADDR_DC = B.ADDR_DC
        AND C.COMPANY_ID = B.COMPANY_ID
LEFT JOIN
    COUNTRY CNTRY
        ON     B.COUNTRY_CD = CNTRY.COUNTRY_CD
WHERE
    A.COMPANY_ID = :CP_COMPANY_ID
    AND (
        A.CUST_ID = 'AAA'
    )
    AND (
        (
            B.S_BILL_ADDR_CD IN (
                'Y', 'D'
            )
        )
        OR (
            B.S_SHIP_ADDR_CD IN (
                'Y', 'D'
            )
        )
        OR (
            B.S_BILL_ADDR_CD = 'N'
```

```
                AND B.S_SHIP_ADDR_CD = 'N'
            )
        )
---------------------------------------
Records read: 42

---------------------------------------
Source
---------------------------------------
ADDR_DC = BILLING
CUST_ID = AAA
CNTACT_ID = 001
CNTACT_FIRST_NAME = HAL
CNTACT_LAST_NAME = VINEBURG
CNTACT_TITLE_NAME = A/P MANAGER
PHONE_ID = 123
OTH_PHONE_ID =
FAX_ID = 12345678901234567890
NOTES =
LN_1_ADDR = 4024 Guinea Road
LN_2_ADDR =
LN_3_ADDR =
S_BILL_ADDR_CD = Y
CITY_NAME =
MAIL_STATE_DC = UK
POSTAL_CD =
COUNTRY_ISO2_CD = GB

Warning 00001: Only the first 24 characters of the CUST_ADDR_CNTACT.FAX_ID
were moved to the
Contacts.Fax field in CRM due to field size limitations in CRM.
Remediation:
Option 1: Leave the fields alone and allow the target application`s field to
be automatically shortened.
Option 2: Change the content of the source application`s field so that it
only contains up to 24 characters to fit in target application.

Error 00089: The phone or fax number for the CUST_ADDR_CNTACT.PHONE_ID field
does not match the format that has been defined.
Remediation: Please update the CUST_ADDR_CNTACT.PHONE_ID field to match the
following format: (###) ###-####

A record failed validation

---------------------------------------
Source
---------------------------------------
ADDR_DC = BILLING
CUST_ID = AAA
```

```
CNTACT_ID = 002
CNTACT_FIRST_NAME = JERRY
CNTACT_LAST_NAME = LEWIS
CNTACT_TITLE_NAME =
PHONE_ID = 12345678901234
OTH_PHONE_ID =
FAX_ID =
NOTES =
LN_1_ADDR = 1111 INTERNATIONAL DRIVE
LN_2_ADDR = SUITE 301
LN_3_ADDR =
S_BILL_ADDR_CD = D
CITY_NAME = FALLS CHURCH
MAIL_STATE_DC = VA
POSTAL_CD = 22302
COUNTRY_ISO2_CD = US

---------------------------------------
Target
---------------------------------------
<ContactID>AAABILLING002</ContactID>
<ClientID>AAA</ClientID>
<CLAddress>BILLING</CLAddress>
<Type>C</Type>
<LastName>LEWIS</LastName>
<FirstName>JERRY </FirstName>
<Title> </Title>
<Address1>1111 INTERNATIONAL DRIVE</Address1>
<Address2>SUITE 301</Address2>
<Address3> </Address3>
<City>FALLS CHURCH</City>
<State>VA</State>
<ZIP>22302</ZIP>
<Country>US</Country>
<Phone>(123) 456-7890 1234</Phone>
<Fax></Fax>
<Pager></Pager>
<CellPhone></CellPhone>
<HomePhone></HomePhone>
<Memo> </Memo>
<Billing>Y</Billing>
<PrimaryInd>N</PrimaryInd>
<ContactStatus>A</ContactStatus>
<CustomCurrencyCode> </CustomCurrencyCode>
<PhoneFormat>(###) ###-####</PhoneFormat>
<FaxFormat>(###) ###-####</FaxFormat>
<PagerFormat>(###) ###-####</PagerFormat>
<CellPhoneFormat>(###) ###-####</CellPhoneFormat>
```

```
<HomePhoneFormat>(###) ###-####</HomePhoneFormat>
<ContactID>AAABILLING002</ContactID>
<CustCustContactID>002</CustCustContactID>
```

Object Detail Logs

The Object Detail logs are CSV files generated for each object being transferred. It will contain the keys of records that passed transformation validation. The location of the Object Detail logs is also determined by the **Integration Process Log File Location** field on the Transfer GovWin Capture Management Data screen. The file name will be in the format:

<Parameter Name>_<Object Name>_<Time Stamp>.csv

The **Print <Object Name> Log** check boxes on the "Transfer GovWin Capture Management Data" screen determine if an Object Detail Log will be generated. Also, the **Show detail log headers** check box toggles the inclusion of column headers in the object logs.

Object Detail Log Example

CLNT_CNTACT object detail log:

```
Client, FirstName, LastName
"AAA","JERRY ","LEWIS"
"AAA","HAL","VINEBURG"
```

Export Log

The export log contains validation error responses from the GovWin CM web service along with the request XML. The export log file name is "CP_INT_CRM_DEServer.log" and it is located in the Costpoint log directory. You can also view these validations errors on the View Interface Execution Status History screen.

Export Log Example:

```
(Jul 23 2014 15:07:37:[[ACTIVE] ExecuteThread: '1' for queue:
'weblogic.kernel.Default (self-tuning)']: ERROR
com.deltek.enterprise.DEServer.INT.CRM.C71RDO ) CommonInterfaceImpl.java -
Log Id: 0614245730 'EMProjectAssoc' synch process received error after
submitting document to the null(CRM).
--------Request-----------
<del:SendDataToDeltekVision
xmlns:del="http://tempuri.org/Deltek.Vision.WebServiceAPI.Server/DeltekVisio
nOpenAPIWebService"
><del:InfoCenter>Projects</del:InfoCenter><del:ConnInfoXML>
<![CDATA[
<VisionConnInfo><databaseDescription>GovWinCM74CPDev
(ASHDBT16\SQL2012EE)</databaseDescription>
<userName>ADMIN</userName><userPassword>1234</userPassword><integratedSecuri
ty>N</integratedSecurity><SessionID>de301d2c8e864f4da8a9432570dbaf3c</Sessio
nID></VisionConnInfo>
]]>
</del:ConnInfoXML><del:DataXML>
<![CDATA[
<RECS xmlns="http://deltek.vision.com/XMLSchema"
xmlns:xdv="http://deltek.vision.com/XMLSchema"
```

```
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"><REC><EMProjectAssoc
name="EMProjectAssoc" alias="EMProjectAssoc" keys="RecordID"> <ROW
tranType="INSERT"><WBS1>SH57</WBS1><WBS2> </WBS2><WBS3>
</WBS3><Employee>140</Employee><Role>NONE</Role><TeamStatus>Active</TeamStat
us><RecordID>@Generate</RecordID> </ROW></EMProjectAssoc></REC></RECS>
]]>
</del:DataXML></del:SendDataToDeltekVision>
========Response==========
<DLTKVisionMessage SessionID="de301d2c8e864f4da8a9432570dbaf3c">
  <ReturnCode>ErrDataVal</ReturnCode>
  <ReturnDesc>Data Validation Error</ReturnDesc>
  <Detail>
    <ValidationResult>
      <Message>
        <Table>EMProjectAssoc</Table>
        <Column>Role</Column>
        <ColValue>NONE</ColValue>
        <RowNum>1</RowNum>
        <PrimaryRecKeyVal>SH57||</PrimaryRecKeyVal>
        <MsgCode>VAL1001</MsgCode>
        <MsgDesc>Value not in the master/code table!</MsgDesc>
      </Message>
    </ValidationResult>
  </Detail>
</DLTKVisionMessage>
```

View Error on the View Interface Execution Status History screen

You can view the same integration validation error information from the Export Log in the Export Errors subtask of the View Interface Execution Status History screen. This screen is located in the Costpoint Administration domain (**Administration** » **System Administration** » **System Administration Reports/Inquiries** » **View Interface Execution Status History**).

Troubleshooting Steps

The following table provides remediation steps for errors/issues that you may encounter during integration:

Issue	Remediation
The following error displays: “Costpoint has not been configured to use GovWin CM web services.”	Verify that a connection to GovWin Capture Management web services was set up correctly in the Costpoint Configuration Utility. **To verify the connection, complete the following steps:** 1. Launch the Costpoint Configuration Utility. 2. Click the **Test** button to make sure a connection can be established.
The following error displays: “There was an error	Verify the connection URL and/or increase timeouts in the

Issue	Remediation
retrieving GovWin CM settings.”	Costpoint Configuration Utility. **To verify the connection and/or increase timeouts, complete the following steps:** 1. Launch the Costpoint Configuration Utility. 2. Ensure that the URL provided for the GovWin Capture Management web services is correct. 3. Click the **Test** button to verify the connection. 4. If the URL provided is correct but you are still getting this error, increase the **Connection Timeout** and **Request Timeout** limit to make sure that the connection is not being closed before the web service can respond. The default timeout value is 10 seconds (**10000** milliseconds).
Process Logs and Object Detail Logs are not generated.	Check the log file location specified on the Transfer GovWin Capture Management screen. **To check the log file location, complete the following steps:** 1. Go to the Transfer GovWin Capture Management Data screen in Costpoint. 2. Ensure that the location specified in the **Integration Process Log File Location** field is valid 3. Ensure that Costpoint has read and write access to the file location provided.
A record did not transfer to GovWin Capture Management.	Check connection, record selection parameters, and log files. **To verify issues with missing records, complete the following steps:** 1. Verify the connection to GovWin CM web service in the Costpoint Configuration Utility. ▪ Check the URL provided in the utility. ▪ Click the **Test** button to verify the connection. 2. Ensure that the missing record satisfies the selection criteria (object parameter). ▪ Run the select statement provided in the Process Log against the CP database to check if the record is included. If you cannot find these logs, please see the solution for the “Process Logs and Object Detail Logs are note generated” issue in this table. 3. Refer to the Object Detail Log (if opted to be generated) to check if the record passed validation. 4. Check the Process Logs for validation errors. If errors occurred, follow the remediation steps provided.

Issue	Remediation
	5. Check the Export Logs or the View Interface Execution Status History screen for errors.

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