
HR Toolkit Installation Instructions

Dean Evans and Associates LLC.



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Dean Evans and Associates LLC.
6465 Greenwood Plaza Blvd
Suite 600
Centennial, CO 80111

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HR Toolkit

Installation Instructions

CUSTOMER SUPPORT.....	4
INTRODUCTION	5
HR TOOLKIT – GROUP/GROUP TYPE MODEL.....	6
OBTAINING THE HR TOOLKIT COMPONENTS.....	6
HR TOOLKIT OVERVIEW	6
<i>The EMS_Staging Database.....</i>	6
<i>Maintaining Group Records in EMS</i>	7
INSTALLING AND EXECUTING THE HR TOOLKIT	8
<i>Installation.....</i>	8
<i>Execution.....</i>	8
HR TOOLKIT – GROUP/CONTACT MODEL.....	10
OBTAINING THE HR TOOLKIT COMPONENTS.....	10
HR TOOLKIT OVERVIEW	10
<i>The EMS_Staging Database.....</i>	10
<i>Maintaining Contact, Group and Group Type Records in EMS.....</i>	11
<i>Hybrid Group/Contact HR Toolkits.....</i>	12
INSTALLING AND EXECUTING THE HR TOOLKIT	12
<i>Installation.....</i>	13
<i>Execution.....</i>	13

Customer Support

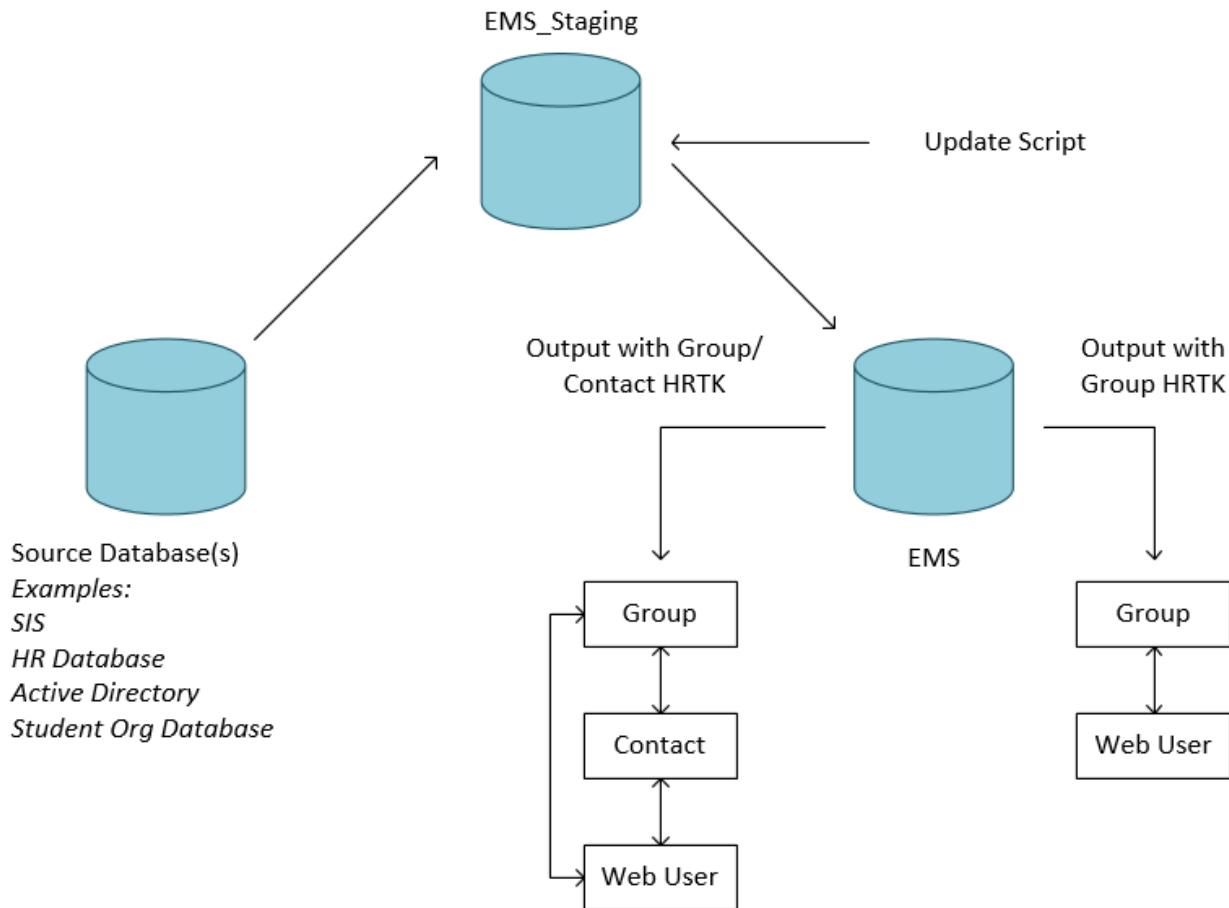
Please note that support for the HR Toolkit extends only to installing the EMS components outlined below. For help identifying the appropriate data source within your environment or defining/creating a process to import data into the EMS staging database, please consult your internal IT Department.

Unlimited toll-free customer support is available to EMS users who have a current Annual Service Agreement (ASA). Please contact Customer Support (or a member of the Professional Services group if you are working with one) if you have any questions or encounter any issues implementing the HR Toolkit.

Email: support@dea.com
Web: www.dea.com
Phone: (800) 288-4565
Fax: (303) 796-7429

Introduction

The HR Toolkit (HRTK) is intended to help automate your organization's creation, updating and inactivation of Web Users and Groups/Contacts. The HRTK is populated with information from your organization that is then transferred to EMS to create, update and inactivate groups, contacts and web users as necessary. This allows an automated way for you to keep EMS up to date with changes within your institution without having to perform manual maintenance.



The information from your organization's database(s) is loaded into the EMS_Staging table and then the HRTK process is run to populate the data from the staging table into EMS. This information populates and updates the information for your EMS Groups, Contacts, and Web Users.

HRTK comes in two distinct variations: Group and Group/Contact. Your Implementation Consultant will work with you to determine which variant will be best for your organization. The "Group/Contact" model is structured around having your Groups populated with Contacts beneath them; the "Group" model does not create Contacts under the Groups being brought into the HRTK. Note that your EMS environment may use different names for Groups and Contacts.

This document lists the steps you must take to install HR Toolkit in your environment. If you are unsure whether your organization is licensed for the HR Toolkit or if you would like to learn more about it, please contact your Account Executive.

HR Toolkit – Group/Group Type Model

Obtaining the HR Toolkit Components

Please contact your Professional Services Consultant to obtain the following components:

- **HRTK Staging DB Install G_GT_WU.sql** – SQL file required to create the staging database - *EMS_Staging*.
- **HRTK Update Script G_GT_WU.sql** – SQL file required to create the stored procedure *HRTK_Update_Group* within your EMS database.

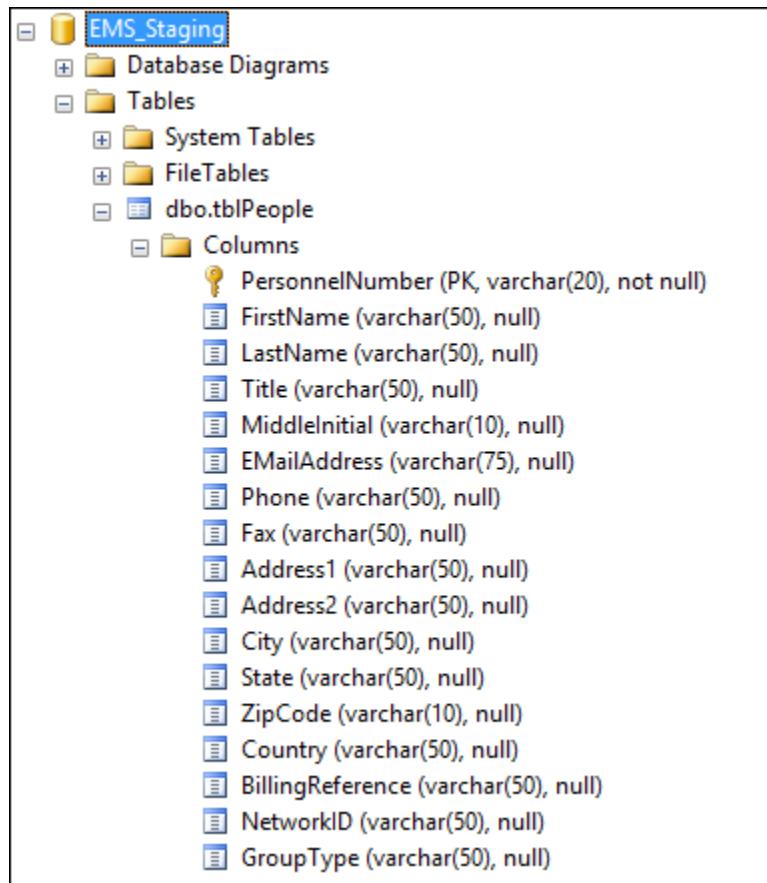
HR Toolkit Overview

The EMS_Staging Database

The *EMS_Staging* database (created by **HRTK Staging DB Install G_GT_WU.sql**) is used to stage Group and Web User records before they are imported into EMS.

Note: your EMS database may have the “Groups” field renamed to another term.

Once you have identified the data source within your organization that will be used to create and maintain your EMS Group and Web User records, you will be required to define/create a process to import **ACTIVE** Group records into the *tblPeople* table within *EMS_Staging*.



Maintaining Group Records in EMS

The **HRTK_Update_Group** stored procedure (created by **HRTK Update Script G_GT_WU.sql**) contains all of the logic to create your EMS Group and Web User data. Records are imported into EMS from the **EMS_Staging** database according to the specifications outlined in the following table:

EMS Staging Table G_GT_WU		
EMS Staging Field (varchar)	Writes Data to EMS Database Fields	Requirements/Notes
PersonnelNumber (20)	Group.ExternalReference	Required Unique identifier (e.g. Employee/Student ID, Personnel Number, etc.) for each web user. Used for purposes of creating /updating EMS.
FirstName (50)	Group.GroupName WebUser.UserName	Must have at least 1 of 3. Built in EMS as LastName, FirstName Middle Initial
LastName (50)	Group.GroupName WebUser.UserName	Must have at least 1 of 3. Built in EMS as LastName, FirstName Middle Initial
Title (50)	Contact.Title	can be null
MiddleInitial (10)	Group.Group Name WebUser.UserName	Must have at least 1 of 3. Built in EMS as LastName, FirstName Middle Initial
EMailAddress (75)	Group.EmailAddress WebUser.EmailAddress	Required for Web User creation
Phone (50)	Group.Phone WebUser.Phone	can be null
Fax (50)	Group.Fax WebUser.Fax	can be null
Address1 (50)	Group.Address1	can be null
Address2 (50)	Group.Address2	can be null
City (50)	Group.City	can be null
State (50)	Group.State	can be null
ZipCode (10)	Group.ZipCode	can be null
Country (50)	Group.Country	can be null
NetworkID (50)	Group.NetworkID WebUser.NetworkID	Required for Integrated Authentication
GroupType (50)	GroupType.Description <i>if unique</i> Group.GroupTypeID	Required for assignment of Group Type to groups. Will create unique group types in group type table and assign to groups.

EMS uses the **PersonnelNumber** field in **EMS_Staging.tblPeople** and the **tblGroup.ExternalReference** and **tblWebUser.ExternalReference** fields in the EMS database to determine whether a record needs to be added, updated, or inactivated.

Group and/or Web User records within EMS with an empty External Reference field are excluded from processing. Therefore, Groups that are not included in your data feed (e.g. contractors, temporary employees, etc.) can be added and maintained manually within EMS and will not be impacted by the HR Toolkit.

Important Note: Existing EMS clients must 'synchronize' existing EMS Group and/or Web User records before activating the HR Toolkit by adding a valid **PersonnelNumber** value in **tblGroup.ExternalReference** and **tblWebUser.ExternalReference**. **Ignoring this step will result in duplicate records.**

Group Type Records

Unique GroupTypes in **EMS_Staging.tblPeople** are added to the Group Types table in EMS (**EMS.tblGroupType**). Group Types are not updated or inactivated.

New Group Records

If *PersonnelNumber* in *EMS_Staging.tblPeople* is not found on a Group record in EMS, a Group and Web User account will be created for that record.

In addition to creating a new Web User record, this process also automatically assigns the Group to the Web User record. This allows a Web User to make a reservation using their Group record within Virtual EMS.

Various configuration settings are available to automatically assign the appropriate Web Process Template(s) when a user hits your Virtual EMS site for the first time. Within the Virtual EMS Parameters area of EMS (*System Administration > Settings > Parameters (Virtual tab)*), the following parameters must be set accordingly to activate this feature:

Note: Ignore the “Auto Creates...” and “Security Status...” parameters if your HR Toolkit was customized to automatically assign Web Process Templates to Web Users.

Area	Description	Value
Account Management	Auto Creates Web Users During Integrated Authentication	Yes
Account Management	Default Security Template for User	<i>Must be specified</i>
Account Management	Security Status for User	Active

To automatically assign a Web Process Template to new Web Users, select the '**Available to New Web Users**' option within your Web Process Template(s) (*Configuration > Web > Web Process Templates*).

Updates to Existing Group Records

If *PersonnelNumber* in *EMS_Staging.tblPeople* is found in EMS, existing Group, Web User and Contact records will be updated with any changes.

Inactive Group Records

If *PersonnelNumber* in EMS is not found on a record in *EMS_Staging.tblPeople*, the Group and Web User record in EMS will be inactivated.

Installing and Executing the HR Toolkit**Installation**

The following steps should be performed on the MS SQL Server that hosts your EMS database.

1. Obtain the SQL files outlined in the section above.
2. Using Microsoft SQL Server Management Studio execute the **HRTK Staging DB Install** **G_GT_WU.sql** script against your **master** database. This will create the *EMS_Staging* database containing one table named *tblPeople*.
3. Using Microsoft SQL Server Management Studio execute the **HRTK Update Script** **G_GT_WU.sql** script against your **EMS** database. This will create a stored procedure in your EMS database named *HRTK_Update_Group*.

Execution

1. Import **ACTIVE** records from your organization's data source into the *tblPeople* table within the *EMS_Staging* database.
2. **For current EMS clients only:** Ensure that existing Group and/or Web User records have been 'synchronized' as outlined above.

3. Using *Microsoft SQL Server Management Studio* execute the *HRTK_Update_Group* stored procedure.

Note: Step 3 (and Step 1 with assistance from your IT Department) can be scheduled to execute automatically using a SQL Job. Please refer to your MS SQL Server documentation for more information on creating and scheduling a SQL Job. This is **NOT** an EMS managed process.

HR Toolkit – Group/Contact Model

Obtaining the HR Toolkit Components

Please contact your Professional Services Consultant to obtain the following components:

- **HRTK Staging DB Install G_C_GT_WU.sql** – SQL file required to create the staging database - *EMS_Staging*.
- **HRTK Update Script G_C_GT_WU.sql** – SQL file required to create the stored procedure *HRTK_Update_Group* within your EMS database.

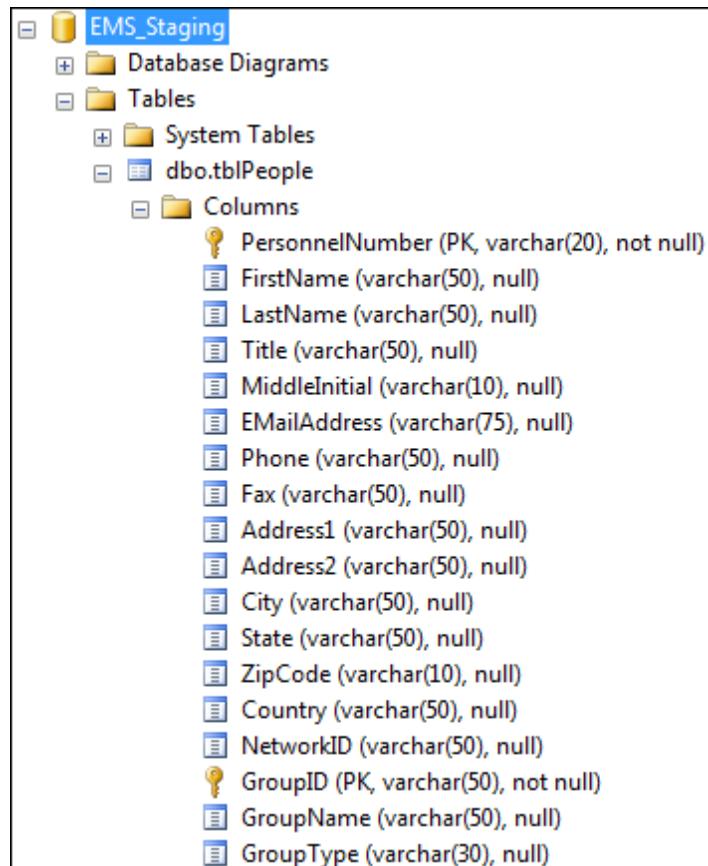
HR Toolkit Overview

The EMS_Staging Database

The *EMS_Staging* database (created by **HRTK Staging DB Install G_C_GT_WU.sql**) is used to stage Contact, Group and Web User records before they are imported into EMS.

Note: your EMS database may have the “Groups” and “Contacts” fields renamed to other terms.

Once you have identified the data source within your organization that will be used to create and maintain your EMS Contact, Group and Web User records, you will be required to define/create a process to import **ACTIVE** records into the *tblPeople* table within *EMS_Staging*.



Maintaining Contact, Group and Group Type Records in EMS

The **HRTK_Update_Group** stored procedure (created by **HRTK Update Script G_C_GT_WU.sql**) contains all of the logic to create your EMS Contact, Group and Web User data. Records are imported into EMS from the *EMS_Staging* database according to the specifications outlined in the following table:

EMS Staging Table G_GT_C_WU		
EMS Staging Field (varchar)	Writes Data to EMS Database Fields	Requirements/Notes
PersonnelNumber (20)	Contact.External Reference WebUser.ExternalReference	Required Part of Primary Key Cluster. Unique identifier (e.g. Employee/Student ID, Personnel Number, etc.) for each web user. Used for purposes of creating /updating EMS.
FirstName (50)	Contact.Contact WebUser.UserName	Must have at least 1 of 3. Built in EMS as LastName, FirstName Middle Initial
LastName (50)	Contact.Contact WebUser.UserName	Must have at least 1 of 3. Built in EMS as LastName, FirstName Middle Initial
Title (50)	Contact.Title	can be null
MiddleInitial (10)	Contact .Contact WebUser.UserName	Must have at least 1 of 3. Built in EMS as LastName, FirstName Middle Initial
EMailAddress (75)	Contact.EmailAddress WebUser.EmailAddress	Required for Web User creation
Phone (50)	Contact.Phone WebUser.Phone	can be null
Fax (50)	Contact.Phone WebUser.Fax	can be null
Address1 (50)	Contact.Address1	can be null
Address2 (50)	Contact.Address2	can be null
City (50)	Contact.City	can be null
State (50)	Contact.State	can be null
ZipCode (10)	Contact.ZipCode	can be null
Country (50)	Contact.Country	can be null
NetworkID (50)	WebUser.NetworkID	Required for Integrated Authentication
GroupID (50)	Group.ExternalReference	Required. Unique identifier for each group. Along with PersonnelNumber, part of primary key cluster. Use value of '0' when web user has no group associations.
GroupName (50)	Group.GroupName	Required only for Web Users associated with Groups. If null, GroupID must be '0'.
GroupType (50)	Group.GroupTypeID GroupType.Description if unique	Required only for Web Users associated with Groups. Associates groups with group types. Unique group types will be created. If null, GroupID must be '0'.

Group Type Records

Unique GroupTypes in *EMS_Staging.tblPeople* are added to the Group Types table in EMS (*EMS.tblGroupType*). Group Types are not updated or inactivated.

Group Records

Groups that exist in *EMS_Staging.tblPeople*, but not in *EMS.tblGroup* (based on *EMS_Staging.tblPeople.GroupID* and *EMS.tblGroup.ExternalReference*) will be created in EMS.

For Groups that exist in *EMS_Staging.tblPeople* and in *EMS.tblGroup*, GroupName and GroupType changes in *EMS_Staging* will be updated in EMS.

Groups that exist in *EMS.tblGroup*, but not in *EMS_Staging.tblPeople* will be inactivated in EMS (includes all of the Contacts associated with the Group).

Contact Records

Contacts that exist in *EMS_Staging.tbl/People*, but not in *EMS.tbl/Contact* (based on *EMS_Staging.tbl/People.PersonnelNumber* and *EMS.tbl/Contact.ExternalReference*) will be created in EMS for the associated Group (see section above for Group maintenance logic). A Web User account will also be created for the Contact in EMS and the Group record will be automatically assigned to the Contact's Web User record. This allows the Contact to make a reservation on behalf of the Group in Virtual EMS.

For Contacts that exist in *EMS_Staging.tbl/People* and in *EMS.tbl/Contact*, any/all changes to the Contact's information (name, address, etc.) in *EMS_Staging* will be updated in EMS. If the Group that a Contact is assigned to changes, the Contact record under the original Group will be inactivated and a new Contact record will be added under the new Group. This process also automatically assigns the Group record to the Contact's Web User record.

Contacts that exist in *EMS.tbl/Contact*, but not in *EMS_Staging.tbl/People* will be inactivated in EMS.

Virtual EMS Considerations

Various configuration settings are available to automatically assign the appropriate Web Process Template(s) when a user hits your Virtual EMS site for the first time. Within the Virtual EMS Parameters area of EMS (System Administration > Settings > Parameters (Virtual tab)), the following parameters must be set accordingly to activate this feature:

Note: Ignore the “Auto Creates...” and “Security Status...” parameters if your HR Toolkit was customized to automatically assign Web Process Templates to Web Users.

Area	Description	Value
Account Management	Auto Creates Web Users During Integrated Authentication	Yes
Account Management	Default Security Template for User	<i>Must be specified</i>
Account Management	Security Status for User	Active

To automatically assign a Web Process Template to new Web Users, select the '**Available to New Web Users**' option within your Web Process Template(s) (Configuration > Web > Web Process Templates).

Hybrid Group/Contact HR Toolkits

In some instances, it may be necessary to combine elements of the Group/Group Type and Group/Contact model HR Toolkits. Usually this is necessary when you will have some web users belonging to a department while other web users will not be part of a department and simply using Virtual EMS on their own behalf. A common example is with study rooms on college campuses; all students on campus should have access to Virtual EMS to book these study spaces, but they may not all belong to a Group, and therefore are created following the Group/Group Type rules. In addition with this Toolkit, it is possible to have users created that belong to both individual Groups and organizational Groups. For instance, John Doe could be created as a contact for the History department as well as an individual Group. You should work with your Professional Services Consultant for guidance on whether this particular version of the HR Toolkit is right for you.

Installing and Executing the HR Toolkit

Important Note: Existing EMS clients must ‘synchronize’ existing EMS Group, Contact and Web User records before activating the HR Toolkit. **Ignoring this step will result in duplicate records.** Please see your Professional Services Consultant for more details.

Installation

The following steps should be performed on the MS SQL Server that hosts your EMS database.

4. Obtain the SQL files outlined in the [Obtaining the HR Toolkit Components](#) section above.
5. Using *Microsoft SQL Server Management Studio* execute the **HRTK Staging DB Install** **G_C_GT_WU.sql** script against your **master** database. This will create the *EMS_Staging* database containing one table named *tblPeople*.
6. Using *Microsoft SQL Server Management Studio* execute the **HRTK Update Script** **G_C_GT_WU.sql** script against your **EMS** database. This will create a stored procedure in your EMS database named *HRTK_Update_Group*.

Execution

4. Import **ACTIVE** records from your organization's data source into the *tblPeople* table within the *EMS_Staging* database.
5. **For current EMS clients only:** Ensure that existing Group and/or Web User records have been 'synchronized'.
6. Using *Microsoft SQL Server Management Studio* execute the *HRTK_Update_Group* stored procedure.

Note: Step 3 (and Step 1 with assistance from your IT Department) can be scheduled to execute automatically using a SQL Job. Please refer to your MS SQL Server documentation for more information on creating and scheduling a SQL Job. This is **NOT** an EMS managed process.