



Marketplace Integrations FCU Setup User Guide

Version 1.0

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About this guide

This guide includes step-by-step processes for navigating, installing and managing FCU templates from the Marketplace to your system.

Intended audience

This guide aims to help Infor clients and consultants use FCU templates for frequently used file-based integrations.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

Overview

The Infor HR Talent development team has started a new initiative to provide templates for standard file-based integrations. These templates are built and exported using the File Creation Utility and then made available to customers and consultants on the Infor Marketplace (<https://market.infor.com>) for free.

The initial release of the product generates CSV files for standard HR code definition tables like HR Organization Unit, Position, Job, and Supervisor. In the future, we will be providing more advanced mappings for common third-party integration vendors. If you have any suggestions or requests for a template to be built for one of your vendors, contact informarketplace@infor.com

Installation

Importing the FCU integration template

Before importing the FCU integration template, you must have the basic HR Talent application setup in place such as HR Organization.

You also must have the delivered Admin_ST security role from HR Talent (or a similar custom role) which includes access to all the File Creation Utility business classes and forms.

You should also have your Actor Context set to the required HR Organization.

1. On Infor Marketplace, download a copy of the exported FCU Setup.
2. Access the GHR System.
3. Navigate to Integration Architect Dashboard and select **FCU Setup**.

Optionally, select **Integration Maintenance > File Creation Utility > Dashboard**.

4. Click the ellipsis, then select **Import Setup**.
5. To enable the modal window to configure the setup before importing it to the system, you must export the file.
 - a. Select the **Organization**.
 - b. Select **Setup Export Folder** icon to search for **Downloaded Setup**.
 - c. If it is a new setup, select the **Create New Setup** check box.
Otherwise, click the **Search** button to update a current design and select which format to update in the system.
 - d. Select the appropriate separator for the setup.
 - Double Caret
 - Pipe
 - Caret
 - Double Pipe

Note: For the Marketplace templates, the import should be left at Double Caret.
 - e. Select the **End of Line Character** for the setup.
This is initially set to **Server Default** but can be configured to any of these options:
 - Carriage Return
 - Line Feed
 - Carriage Return
 - Line Feed

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- f. Click **Submit**.
 6. Open **Imported Setup**.
 7. To enable the generation of records, you must activate the setup in the **Setup Detail** tab. Switch the button to **Active**.
 8. To generate records, click **Generate Preview Records**.
 9. To populate the preview records, select the check box for **Generate File**.
Note: If the check box is cleared, no Preview records are displayed. All the data is displayed on the **All Records** tab.
 10. To generate files, click **Generate File Threaded**.
Clicking submit transfers the records to the **All Records** tab and changes their status to **Processed**.
 11. To access the Generated Flat file, select the **File** tab.
 12. Download the Generated Flat file.
Note: To access the downloadable file, the file record should be open. You can rename or transfer the file after downloading it.

Adding mapping

You can modify and update the flat file output based on your organization's requirements. You can also update the rows or columns.

1. To add rows and columns under the mappings tab, on the **Row detail** section, click **Create**.
2. Add a description for the row in **Create Row**.
3. Select **Row Type**.
This is set to Source File by default and can be configured to **Header** or **Trailer** row.
4. To display the mappings tab and to complete adding the row, click **Save**.

Adding column details

You can add column details by using the Add Fields button or the Create button in the Column Detail table.

1. To add column details using the Add Fields button, select a row under **Row Detail** and click **Add Fields**.
 - a. Navigate to the vertical tabs on the left of **Add Fields** panel.
 - b. To select the fields to be added to the Column Details table, select the check box.
 - c. To display the mappings tab and complete adding the columns, click **Save**.
2. To add column details using the Create button, click Create in the Column Detail table.
 - a. The detail tab for the column will be displayed. Add the necessary details on the fields Field Name and Description.
 - b. Specify the data type:
The data type is set to null by default but can be changed to **Alpha**, **Numeric**, **Decimal**, **Date**, **Time**, **Boolean**, **Text**, or **Timestamp**.
 - c. To configure the **Input Option**, select either **Field Optional**, **Field Required**, **Literal**, or **Blank**.
 - d. Click the magnifying glass icon to configure the source field for the column.

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- e. To display the modal window on the screen, select the source field for this column.
 - f. Click **OK**.
 - g. To complete adding the column, click **Save**.
 5. To reorder the column and display the modal window, select the ellipsis icon.
 6. Specify the order for the column.
 7. Click **Submit**. Verify that the column order is the one you specified.

Deleting mapping

1. To remove unnecessary rows and columns from the setup, select the field to be deleted.
2. Click the ellipsis icon in the table and select **Delete**.
3. To confirm deleting the selected field, click **OK**.

Copying Setup

You can copy the delivered template and rename it to make modifications.

1. On Infor Marketplace, download the copy of exported FCU Setup.
2. Access the GHR System.
3. From the **Integration Architect** dashboard, select **FCU Setup**.

Optionally, you can access the dashboard by selecting **Integration Maintenance > File Creation Utility > Dashboard**.

4. Select the check box of the setup be copied.
Optionally, you can click the ellipsis or right-click to display the menu options and then select **Copy Setup**.
5. On the **Modal** window, select the organization to copy the setup. You can also specify a description for the design before copying.
6. To complete copying the setup, click **Submit** and verify that the filename is the description you specified.

Limitations

The templates posted to Marketplace are configured to export CSV files with a double quote (") as the field delimiter. You can copy and modify the templates to adjust these configurations using the procedures outlined in this guide.

The delivered setups for the HR Talent code tables are built to send all records with each file run. This can also be adjusted on the **Record Selection Options** tab only to get changes since the previous run.

A delivered IPA flow/service definition called **FileCreationSampleFlow** shows how to SFTP the file to a destination site. File Creation Utility also includes the option to send the file through ION; this configuration is done in the **File Attributes and Processing** tab within the FCU setup.

Document history

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1.0	2022-05-05	Initial version (TECDOC-11600)

Net change history

Date	Description	KB article
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