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Integrity Cloud Connector

ICC (Integrity Cloud Connector)

The ICC is a new feature for Dynamics for GP which provides functionality for migrating on-premise data to an Integrity Data Cloud Tenant, or updating the cloud tenant with the latest on-premise data.

The utility allows for the export of the following types of data from Dynamics GP and in some cases allows the user to specify whether a certain type of data originates with the Integrity Data ACA Solution of the Microsoft Dynamics GP solution:

- Employees
- Transactions
- ACA Data (1094-C)
- ACA Date (1095-C)

The ICC is multi-company aware, allowing a user to export from more than one company without having to login or re-login to each company in Dynamics GP. The connector also supports the creation of export profiles, which are a collection of export setting that define how the update/communication will occur for a given export event.

The ICC connector is accessible from a single main window and a series of configuration screens (options windows) for each exportable data type. These contain the settings for the export profile.
Installation Overview
This section will discuss the prerequisites, list the files installed and go through the install process.

Prerequisite
The prerequisite for Integrity Cloud Connector is:

- Microsoft Dynamics GP Payroll

Full functionality for Integrity Cloud Connector also requires:

- Affordable Care Act Solution

Install Notes
Prior to installing complete the steps:

- Confirm all users are logged out of Microsoft Dynamics GP
- Complete all payroll runs and validate no payroll runs are in process
- Make a backup of the Company and Dynamics databases

Server/Client
To install Integrity Cloud Connector downloaded the exe file from our website. Once the files have been downloaded, you can run them on the Server and/or Client Installations.

Complete the steps required at the Server and/or Client level to create the necessary Microsoft SQL Server® Components. Creating the Microsoft SQL Server Components needs to be performed on a single computer, typically the server.

1. Right click Integrity Data GP2015 or 2016 or 2018 Setup.exe file and select “Run as Administrator”. If you do not see this option, hold the shift key down and right click.
2. Complete the steps in the wizard
3. Verify the GP directory is correct if it is not select Change
4. Select Custom to choose to install only the specific products you purchased.

5. Select Activation Components to only install activation manager files. This option will not install products and it is typically run only to fix an error with activation manager.

6. Select All Components to install all Integrity Data products. The products you did not purchase will register with a 30-day trial period.
If you are upgrading you will be prompted to uninstall the older version, select "y". If you have multiple products, it will uninstall all products.

7. Select the product(s) to install, if installing multiple products, select all that need to be installed.
Integrity Data GP 2015 Setup - InstallShield Wizard

Custom Setup
Select the program features you want installed.

Click on an icon in the list below to change how a feature is installed.

- Overtime Hours Rules
- Paycheck "What If" Calculator
- Enhanced Retirement Plans
- Life Insurance Tax Calculator
- Comprehensive Leave Manager
- Employee Email Suite
- HRM Solution Series Extensions
- Employee Accounts and Splits
- [ ]

Feature Description
Create and manage leave benefits, including FMLA, in Microsoft Dynamics® GP Payroll.
This feature requires 13MB on your hard drive.

Install to:
C:\Program Files (x86)\Microsoft Dynamics\GP2015\ 

Change...

Help Space < Back Next > Cancel

Integrity Data GP 2015 Setup - InstallShield Wizard

Ready to Install the Program
The wizard is ready to begin installation.

If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

Current Settings:

Setup Type:
Custom

Destination Folder:
C:\Program Files (x86)\Microsoft Dynamics\GP2015\ 

User Information:
Name: Windows User
Company:

InstallShield < Back Install Cancel

9. If prompted to include new code, choose yes.

10. Login as the 'system administrator' for each company to create the SQL Server components.

11. The system will auto activate the products you have purchased if you have access to the internet on the machine. If you receive a message Activation Manager failed contact support@integrity-data.com and include a screenshot of the Activation Manager window.

**BEST PRACTICES**

Install is not a requirement on the **Server**; however it is recommended.  
Install updated version on previously installed **Client** machines.
**Integrity Cloud Connector**

The ICC window allows the user to complete two main functions:

1) Configure and save export settings as a profile
2) Run the export process

**Configuring a Profile**

Creating a profile is as easy as specifying an export profile code and description and then clicking the “save” button. The actual configuration, however, is more in depth. A general explanation follows but for detailed information on what the fields and buttons do, please consult the explanations for the field definitions later. You may also edit and delete profiles as well in addition to clearing the settings of a given profile in order to begin again.

**Company ID and Company Name** - indicate which Dynamics GP company is currently associated with the export profile. This indicates which company database will be used when exporting information to the cloud tenant.

**Destination Tenant** - indicates where the data will be exported. A valid destination will need to be specified.

**Employee Match** – indicates how the system will know to associate the exported data once it reaches the cloud tenant.

**Information to include** – indicates which groups of data will be included for export to the cloud. A checked box indicates that group will be included.

**IMPORTANT:** Once a user is finished configuring a profile it must be saved before the export process can take place. If the profile is not saved then the system will prompt for save when the user attempts to run the export process.
Fields

Export Profile – This is a code for quickly identifying which group of settings is being edited or saved.

Description – This field is a longer text field and is meant to further describe the purpose of the export profile. In the example above the user chose a description that reflects the purpose of the profile which is to conduct monthly updates of the cloud tenant with the Dynamics GP data.

Company ID – This field is a lookup and will display the companies available in Dynamics GP as well as allow the user to select a company. Although the current user may not have permissions to conduct an export for the listed company, they will nonetheless be able to view the export profile for that company (see Export button later).
**Company Name** – Indicates the full company name associated with the Company ID in Dynamics. This is a read only field.

**Destination Tenant** – This field displays the tenant name which will be the destination for the exported data. It will only appear after the user sets the tenant and then applies the login credentials (see the “set” and “apply” buttons below).

**Local Export Only** - This feature allows the user to bypass the connection to the IDCS cloud tenant, and instead send the export data to a file on your local hard drive.

**Local Export Only** - Select the checkbox to activate the feature that will allow you to export the file to your hard drive.

**Select an export file name** – indicates the directory path and file name that will be used when the export file is generated and saved. You need to specify a filename as well as the directory path. Make sure the file name ends in .xml. Click the folder icon to open a window to select the directory.

**Buttons**

**Set** – Pressing this button will initiate a communication request with the Cloud Services tenant and open a web browser for the user to login with their credentials. Once a credential provider has been selected and the login completed, the user must click the apply button to complete the process.

**Apply** – Pressing this button will apply the tenant security validation to the system and complete the setting of the destination tenant. This is necessary to complete the process. Once done, you will notice the tenant name appear in the field above the buttons. At that point you may close the web browser, which was opened in the previous step. There is also a message, depicted below, alerting you to the fact.

**Options** – Pressing this button will open an options window which is specific to the corresponding information type it appears next to. (E.g. Employees, Transactions etc….) For ACA 1094-C and ACA 1095-C the options window is the same. Those two information types share the same configuration options.

**Save** – Clicking this button will save the profile. (Required before initiating an export)

**Clear** – Clicking this button will clear the settings for the profile in the window.
**Delete** – Clicking this button will delete the export profile

**Export** – Clicking this button will initiate the export process for the selected export profile. Note that certain pre-requisites must be met:

- The user has permission to export for this company
- The destination tenant has been set and applied
- There is at least one checkbox marked in the profile for “Information to include”

*Note: Attempting to export will result in a warning as depicted below. If the user continues the profile will be saved automatically.*

---

**Microsoft Dynamics GP**

This export process will also save the current profile before proceeding. Do you wish to continue?

- [Continue]
- [Cancel]

---

**Important:** All other export reports for the information types are accessible via the existing Import/Upload page when the user is logged into the tenant via the cloud web application

**Browse Buttons** – The four buttons in the left lower portion of the window and used to cycle through the export profile codes or the Descriptions in order to more easily find the desired profile record. Options or first; previous; next; last respectively.

**Code** – The drop down list at bottom left contains the options for browsing either by Export Profile Code or Description. Default selection is by code.

---

**Export Process:** The export process consists of pressing the Export action button when the export profile is ready and saved. The system will gather the information and communicate via web services to the cloud tenant. If more than one information type is selected for export, the system will begin with the first and then move on to the next. A progress meter will indicate the progress for each information type being exported.

It is important to understand that the export process is a two-fold procedure. The system must gather, bundle and make the data available to the web service (progress indicator). But after handing this information off to the web service, the cloud tenant takes over and finishes the procedure.

*Note: that if an export is still in process for any of the information types that you will be unable to initiate a different export process for the same or different company.*

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**End Results of Export:**
Upon a successful export (assuming all information types were selected), you should have, in your cloud tenant:

- Employee records – See Payroll Employees
- Transactions – See Transactions
- ACA 1095-C - See Edit 1095-C
- ACA 1094-C – See Edit 1094-C

For the ACA 1094-C Information, if you had selected Dynamics GP ACA as the source, then you will have a 1094-C record in the edit 1094-C window in cloud services. However, this record will be missing information and should be reconciled when you get the opportunity before submitting your information to the IRS. Navigate to the edit 1094-C window and click the "reconcile button at the bottom of the page. Before performing this procedure you may wish to consult the ACA User Guide for cloud services for further details, or contact support.

**Employees-options**

Employee options dictate what information the system will gather for export. There are ways to explicitly include or exclude certain groups of employees. You can also specify restrictions.

See the fields and button definitions below for more detail:

**Fields:**
- **Code** – This a read only field, and displays the export code on the main window for which you are specifying these options.
- **Description** – This is also a read only field, and displays the description of code on the main window for which you are specifying these options.
Include Section – These settings will include employees that meet the criteria

**Inactive** - check this box to include employees that are marked as inactive in Dynamics GP

**Employee ID** - check this box to specify a range of employees to include.

**Transactions Exist** – If you check this box the date fields will become active and you can specify a date range using from and to. Any employee that has a pay code, benefit, or deduction transaction in this date range will be included in the export.

**1095-C Exists** – If you check this box and specify a year in the drop down only employees that have received a 1095-C in that year are included.

Exclude Section – These settings will exclude employees that meet the criteria

**Hire Date on or after** – If you check this box the date field becomes active and you can specify a hire date. Any employees that were hired on or after the date specified will be excluded. This is useful for excluding new employees hired after the end of a calendar year but before you are conducting your year-end closing for the previous calendar year.

**Adjusted Hire Date on or after** – This checkbox functions the same as the Hire Date on or after but uses the adjusted hire date in Dynamics GP as the date for the criteria.

**Inactivated Prior to** - If you check this box the date field becomes active and you can specify a termination date. Any employees that were terminated prior to the date will be excluded in the export. This is useful for making sure no unnecessary employees are included in the upload.

**Last Day Worked Prior to** - If you check this box the date field becomes active and you can specify a Last Day Worked date. Any employees that have a last day worked is prior to the date will be excluded in the export. This is useful for making sure no unnecessary employees are included in the upload.

Restrictions Section – These settings will limit the selection set of employee based on the criteria

**Secondary Status** - When checked will enable the list box control for insert and remove. The list box displays all secondary status codes which are setup in the system. This is useful for making changes or updates to specific employees such as those on Leave of Absence or other status.

**Set Intern/Other to Part Time** – Check this box to change employee statuses of Intern or Other to Part Time.

**Set Terminated Date to Last Day Worked** – Check this box to change the Terminated Date to the Last Day Worked.

User Defined Field Export

The user defined fields 1-3 in the IDCS cloud ACA tenant, can be populated from various source fields in Dynamics GP. The sources appear in the Drop Down List to the right.

<table>
<thead>
<tr>
<th>Set User Defined 1 To</th>
<th>User Defined 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set User Defined 2 To</td>
<td>User Defined 2</td>
</tr>
<tr>
<td>Set User Defined 3 To</td>
<td>User Defined 3</td>
</tr>
</tbody>
</table>

User Defined 1 and User Defined 2 values are fields that can be found in the Employee Additional Information Maintenance window. Employee Class ID is a field on the Employee Maintenance window. None is an option to use when the user does not want to map any fields to the user defined fields in IDCS ACA tenant.

**Set User Defined to 1 to** – Options available are as depicted below:
Note that the terms “Spouse” and “Status” appear in place of User Defined 1 and User Defined 2. This is because in this example the user has applied their own custom labeling to those field in Dynamics GP.

Set User Defined to 2 to – The options available are identical to the options in “Set User Defined 1 to” above

Set User Defined to 3 to – Options available are as depicted below:

<table>
<thead>
<tr>
<th>Set User Defined 1 To</th>
<th>Spouse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set User Defined 2 To</td>
<td>Spouse</td>
</tr>
<tr>
<td>Set User Defined 3 To</td>
<td>Pay Code</td>
</tr>
<tr>
<td></td>
<td>Primary Pay Code</td>
</tr>
<tr>
<td></td>
<td>None</td>
</tr>
</tbody>
</table>

Pay Code will use the rate assigned to the code that is selected in Pay Code field. If an employee does not have this code assigned to them in Employee Pay Code Maintenance then no value will transfer to User Defined 3.

Primary Pay Code will use the rate assigned to the pay code, which has been designated as “Primary”

Please note that for the Primary Pay Code option in “User Defined 3” to function properly, the HR module must be installed and registered.

None will cause the system to not send any rate to the User Defined 3 field

Controls:
- Insert – This button moves the marked code(s) from the available box to the selected box
- Insert All - This button moves all codes from the available box to the selected box
- Remove - This button moves the marked code(s) from the selected box to the available box
- Remove All - This button moves all codes from the selected box to the available box
- OK - This button closes the window. The changes are preserved once you save the profile on the main window.

- You should upload employees ever pay period to catch the new hires and changes. This newest Connector Employee window allows you to filter by Employee ID or a group of employees and then on the Transaction window you check Apply Employee Filter.

Transactions- options

Transactions options dictate what transaction information the system will gather for export. There are ways to explicitly include or exclude certain groups of transactions. You can also specify restrictions.

See the fields and button definitions below for more detail:
Fields:

**Code** – This a read only field, and displays the export code on the main window for which you are specifying these options.

**Description** – This is also a read only field, and displays the description of code on the main window for which you are specifying these options.
Apply Employee Filter – If you check this box it activates a link to allow you to filter transactions by employees.

Include Section – These settings will include employees that meet the criteria

Period Start (From/To) - Check this box to enable the date fields in this section. This option will tell the export process to include transactions that belong to a certain payroll period. The payroll periods to be included will be those where the start date of the period falls between the From and To dates that you specify.

- When using the Period Start check box: For payrolls, after the initial migration, the “From” date on the Period Start line will be one day past the previous “To” date and the new “To” date will be the Start Date of the payroll just completed. Dates in this line are always about the start date time line and not the end date or check date. A start date in the “To” range will copy all the transactions in the payroll.

Period End (From/To) - Check this box to enable the date fields in this section. This option will tell the export process to include transactions that belong to a certain payroll period. The payroll periods to be included will be those where the end date of the period falls between the From and To dates that you specify.

Check Date on or after - Check this box to enable the radio group that will dictate what transactions to include based on check date. When Today is marked, date field for "Date" will not be available. The system will include transactions that belong to a payroll period whose check date is the current date or alter. This is useful for including only transactions that are recent (eg... updating the cloud tenant weekly or monthly). When Date is marked, system will include transactions that belong to a payroll period whose check date is on or after the date specified in the date field.

Exclude Section – These setting will exclude transactions that meet the criteria

Pay Codes – Checking this box will exclude pay code transactions
Deductions- Checking this box will exclude transactions of type deduction
Benefits- Checking this box will exclude transactions of type benefit

Exclude Section – These settings will constrain which codes are exported within the code groups. You must first select the code type using the radio group to determine which codes you will be specifying restrictions for. Once the selection is made you can refer to the list boxes for the actual list of codes. This is useful for updating only certain codes in the cloud tenant.

Pay Code - When marked will enable the list box control for insert, insert all, remove, and remove all. The list box displays all the pay codes which are setup in the system.
Deduction - When marked will enable the list box control for insert, insert all, remove, and remove all. The list box displays all the deduction codes which are setup in the system.
Benefit - When marked will enable the list box control for insert, insert all, remove, and remove all. The list box displays all the benefit codes which are setup in the system.

Controls:
Set Transaction Dates to – Check this box to enable the Set Transaction Dates Radio Group.
Set Transaction Dates to - [Radio Group] Make a selection to determine how transactions will be created in the destination system.

As Is (Default) – When transactions are exported to the destination tenant; System will not modify the transactions. Sources transactions will match destination transactions.
Start Date – When transactions are exported to the destination tenant; System will modify the period start and period end dates of the destination transactions such that: Both dates will be the same as the period start date of the source transaction
End Date – When transactions are exported to the destination tenant; System will modify the period start and period end dates of the destination transactions such that: Both dates will be the same as the period end date of the source transaction.
Split Across Months – When transactions are exported to the destination tenant; System will generate multiple destination transactions according to the following: (see note)

1) For Pay Code Type: System will calculate the daily average amount for Hours and Dollar Amount of the transaction defined by the source transaction’s period start and end date. System will create a single destination transaction for each unique month contained (wholly or partially) within the source transaction’s date range (defined by period start and period end date).

2) For Deduction Type & Benefit Type: System will calculate the daily average amount for the Dollar Amount of the transaction defined by the source transaction’s period start and end date. System will create a single destination transaction for each unique month contained (wholly or partially) within the source transaction’s date range (defined by period start and period end date).

Factor Hours – If you click on the arrow it opens a form to enable you to enter a factor to apply to a pay code.

Note: There are instances when a source transaction’s Period Start and Period End dates span two or more months. In such cases the system has to calculate how best to split the transaction across those months in the destination tenant. For sake of this option, this is calculated and done proportionally as described above. Also of note is that when transactions are created in the destination tenant the start and end dates will be adjusted to accommodate whether the transaction falls in a whole or partial month.
OK - This button closes the window. The changes are preserved once you save the profile on the main window.

**ACA 1094-C / 1095-C options**

ACA 1094-C / 1095-C options dictate what ACA information the system will gather for export.

See the fields and button definitions below for more detail:

![ACA 1094-C/1095-C Options](image)

**Fields:**
- **Code** – This a read only field, and displays the export code on the main window for which you are specifying these options.
- **Description** – This is also a read only field, and displays the description of code on the main window for which you are specifying these options.

**Field Definitions:**
- **IRS Filing Year** - This drop down list allows you to define the filing year for the exported data. The drop down will default to the most recent year which has been closed.
- **Employer Self Insured** – This checkbox value will be transferred to the 1095-C data in the destination tenant in order to properly fill out Part III of the form.
- **Use Data From** – This radio group allows you to specify whether ACA data will come from the Dynamics GP or from the Integrity Data ACA solution.

**Controls:**
- **OK** - This button closes the window. The changes are preserved once you save the profile on the main window.

*Note: If Integrity Data ACA is installed then the Use Data From radio group shall be visible. Else will not be visible*
Contact Information

Get quick answers to your questions

Browse our convenient Knowledge Base for up-to-date answers to the most common questions. For additional questions, please contact your authorized Value Added Reseller (VAR) for support on this product (if you have one) or contact Integrity Data by emailing support@integrity-data.com or calling 888.786.6162.

If you have registered your product, Technical Customer Service is available for any customers with a current Enhancement Plan or subscription. Please have your Company or Site Name available. Your first line of support should always be your VAR (if you have one).

Join our User Groups

We have an HR and payroll focused one and an ACA one – email lbelley@integrity-data.com to join!

Rate us and our products

Are you pleased with your experience with us and our products? Provide a quote and get a gift card! Fill out the form on our contact page and leave your quote in the comment section.

Suggest new features or improvements

User input into improving this product and constructive feedback are appreciated. Please e-mail Tom, our Product Manager, at tfranz@integrity-data.com. As always, technical ideas and user input are highly encouraged. At Integrity Data, we want to hear your input, so drop us a line!

Browse our solutions

The Integrity Data website is a great place to get additional information on products and services. The following information is available on our website:

- Integrity Data’s HR & Payroll software pages include Demos, Features and Benefits, and ROI Calculators
- Visit our Services page to learn more about our additional customization services

If you would like to discuss your needs with a Sales Account Executive, please call 888.786.6162 or e-mail sales@integrity-data.com.