Deltek Maconomy 2.3 GA

Maconomy Integration with Talent Management

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Contents

Overview

This document details the integration between Talent Management and Maconomy. This integration enables Maconomy customers to use Talent Management to manage recruitment and other HR processes while utilizing Maconomy for their ERP solution.

There is no requirement to be live on either Maconomy or Talent Management first. The flexible solution allows for existing customer of either system to integrate simultaneously.

This document is divided into three main sections:

- **Setup**, which includes setup on both systems as well as the initial integration
- **Routine Procedures**, such as syncing employees
- **Common Errors**

Workflows

This integration is one-way from Talent Management to Maconomy, and supports the synchronization of Talent Management *user* and Maconomy *employee* data.

Three workflows are supported:

1. Importing new hires from Talent Management to Maconomy. A new Maconomy employee is created for each imported new hire.
2. Updating Maconomy employees who are already linked with Talent Management.
3. Linking an existing Maconomy employee to an existing Talent Management user.

Additionally, you can choose to synchronization manually as well as on a scheduled basis.

Validation

Note that the integration is one-way from Talent Management to Maconomy. The majority of validation corrections will need to be made in Maconomy, and only in rare circumstances in Talent Management.

Field Mapping

The table below shows field mappings between the Talent Management user and the Maconomy employee. Mapping procedures are detailed in the Maconomy Setup section.

Talent Management Field	Maps to Maconomy Field	Notes
User ID	Talent Management User ID	

Talent Management Field	Maps to Maconomy Field	Notes
Employee ID	Employee No.	The employee ID in Talent Management is assigned to the Employee Number of Maconomy. **Note**: The integration is one way, mapping from Talent Management to Maconomy, except in the initial instance where Maconomy populates the Talent Management user with the related Maconomy Employee ID.
First Name + Middle Name + Last Name	Name 1	The name is constructed by appending the first, middle and last name (with spaces in between).
E-mail	E-mail	
Address One	Name 2	
Address Two	Name 3	
Address Three	Name 4	
City	Postal District	
Zip/Postal Code	Zip Code	
Country	Country / Name5	See Maconomy Setup for details on mapping countries.
ST/PR	Country / Name5	See Maconomy Setup for details on mapping countries.
Primary Phone	Phone	
Hire Date	Date Employed	
Date of Birth	Date of Birth	
Job Title	Position	
Manager	Supervisor, No.	The manager user must be linked to a Maconomy employee to map this field.
Separation Date	Termination Date	

Talent Management Field	Maps to Maconomy Field	Notes
Organization Code of the top level organization of user's organization *See User Org Level field warning below.*	Company No.	Use the Organization Code of the top level organization referenced from a user's organization in Talent Management to indicate the corresponding Maconomy Company Number.

User Org Level Field Warning

It is imperative that the User's Org Level field in Talent Management is accurate, as this Org Level becomes the Company Number of the new Employee in Maconomy.

Note that when a new hire is imported on initial integration, the organization level is taken from the company of the job requisition, not from what (may be) stated on the user at that time.

On subsequent integrations, Maconomy does reference the org-level of the user, so this field must be set to the org-level of the company of the job requisition. If at some point in time the user changes into another part of the organization, update that org-level to reflect whatever company this matches in Maconomy

If no Org Level is specified for User's Org Level in Talent Management, Maconomy defaults to "standard company" from the system parameter setup in Maconomy. The Company Number of the new Employee can be updated manually later, but the employee number of that employee is taken from the Number Series of the initial company.

Ensuring the correct information initially on the job requisition, and then choosing the correct User Org Level in Talent Management ensures good data in Maconomy

Talent Management Setup

To enable the Maconomy integration from within Talent Management, you need to perform system setup, as described below.

Before You Begin

Before you begin the Talent Management integration with Maconomy, contact Talent Management Support to obtain the following:

- User name and password to access middleware site
- URL to middleware site
- FTP site and related information
- “Token” (password) to enable the integration
- Ensure accurate user org level on the job requisition

It is imperative that the User’s Org Level in Talent Management is accurate prior to integration and going forward, as this Org Level becomes the Company Number of the new Employee in Maconomy. *See User Org Level field warning in the previous section.*

Integration Setup

To enable the integration from the Talent Management side, you must log in to a middleware support site, gain access to and complete an integration setup screen, and submit your information.

To enable the Talent Management portion of the integration, complete the following steps:

1. In your web browser, enter the middleware URL. It is in a format similar to the link below:

   https://*clientname*.hrsmart.com/tools

   A middleware site displays.
2. Log in with your user credentials.
3. Click **Special Integration > Maconomy Integration**. An integration setup screen displays.
4. Enter information in the following fields:
   - Client Name
   - Client Existing Token
   - Client URL
   - Client FTP Host
   - Client FTP Username
   - Client FTP Password
   - Client FTP Port
   - Client FTP Type
   - Client FTP Subdirectory

5. In the **Client Notification List** field, enter the email addresses (comma separated) of users who should receive the reports that are generated each time the integration runs, including error reports.
6. Click **Deploy**. The integration is now enabled on the Talent Management side.

Maconomy Setup

To enable the integration with Talent Management, you must perform specific setup in Maconomy, including:

- Follow steps in Before You Begin
- Maconomy setup in MConfig
- Set up country mapping and state mapping
- Set up Talent Management integration

Before You Begin

Before you begin Talent Management integration setup in Maconomy, you must do the following:

- Enable system parameter(s)
- Enable access control

Additionally, to schedule automatic synchronization, you must also set up background integration:

- Set up Background Tasks to synchronize data

Enable System Parameters

To enable Talent Management integration and functionality with system parameters, complete the following steps.

1. Click **Setup » System Setup » Parameters and Numbers » System Parameters**.
2. Search for **Enable Deltek Talent Management Integration**, and enable the field.

   Selecting this parameter enables Talent Management in Workspace Client for the selected company.
3. Search for **Block Employee Off-boarded in Deltek Talent Management**, and enable the field, if needed.

   If this parameter is selected and the user is off-boarded in Deltek Talent Management (such as if the user has left the company), then the linked employee is blocked in Maconomy.

Enable Access Control

Enable access control to integration users so that they can use Talent Management-related synchronization actions.

To enable access control, complete the following steps:

1. Click **Setup » Users » Roles » Actions**.
2. In the Permitted Misc. Action island, select the **Synchronize Talent Management Users with Employees** check box to allow the user to use synchronization actions.

> Note that the access granted in step 2 has no bearing for background job user on the action **"Sync All Empl. with Talent Management**".

Setup Background Integration

If you choose to schedule automatic synchronization, you must set up background tasks. (If you use manual synchronization, skip this section and check Routine Synchronization).

Set Up Background Tasks

Set up Background Tasks for automatic synchronization in the Background Tasks workspace.

Below we briefly describe how to set up the tasks for the Deltek Talent Management (DTM) / Maconomy integration. For more information, see the related chapter in the System Admin Guide.

You must create two background tasks:

- Importing all new Talent Management hires to Maconomy
- Synchronizing Maconomy employees with the latest data from Talent Management

Importing New Hires

To create a Background Task for importing new hires you must create a Key Generator and a Scheduled Rule. Follow these steps:

1. Go to **Setup » Background Tasks » Setup » List of Key Generators**. The Key Generator dialog displays.
2. To create the new Key Generator, complete these fields:
   - **Name** — Enter a name for the Key Generator, such as DTM_Setup
   - **Description** — Enter a description, such as DTM Setup Instance.
   - **Container Name** — Enter **Find_HRSmartIntegrationSetup**.
   - **Pane Name** — Leave the default as **Filter**.
3. Click **Next**.
4. In the **Extracted Rows Match This Condition** box, enter **true**.
5. Click **Create**. The information populates on the Key Generator tab.

   Click Test Key Generation as needed to test and ensure the Key Generator works as expected.

6. Click **Setup » Background Tasks » Setup » List of Schedule Rules**.
7. Click New Background Task Generator. The New Schedule Rule dialog displays.
8. Complete these fields:
   - **Name** — Enter **DTM_ImportNewHires**.
   - **Description** — Enter a Description, such as **Import New Hires from DTM**.
   - **Type** — Select **Single Task**.
9. Click **Next**. The New Schedule Rule dialog displays.
10. Complete these fields:
    - **Container Name** — Enter **HRSmartIntegrationSetup**.
    - **Pane Type** — Select **Card**.

   - **Action Name** — Enter **getNewHires**.
   - **Standard Action** — No action needed.
11. Click **Next**.
12. In the **Container-Key Generator** field, click Search and select **DTM Setup Instance**.
13. The Schedule Rule tab autopopulates and displays. In the Containers Keys island, **Container Key Field**, enter **InstanceKey**.
14. Click **Create**.
15. In the Generator island, Trigger Time Pattern field, enter ***/30 * * * *** This indicates the scheduling pattern which controls the frequency of the synchronization (every half hour).

    Read more about patterns in "Pattern syntax help".

16. Click Activate to activate the rule.

Synchronizing Employees

To create a Background Task for synchronizing Maconomy employees with Talent Management users you must create a Scheduled Rule. Follow these steps.

The **AllEmpls** key generator is used for this task. It is already created in Maconomy.

1. Click **Setup » Background Tasks » Setup » List of Schedule Rules**.
2. Click New Background Task Generator. The New Schedule Rule dialog displays.
3. Complete these fields:
   - **Name** — Enter **DTM_SyncUsersWithEmployees**.
   - **Description** — Enter a description, such as **Synchronize DTM Users with Maconomy**.
   - **Type** — Select **Single Task**.
4. Click **Next**.
5. To specify the action to schedule, complete these fields:
   - **Container Name** — Enter **Employees**.
   - **Pane Type** — Select **Card**.
   - **Action Name** — Enter **SyncWithHRSmart**.
   - **Standard Action** — No action needed.
6. Click **Next.**
7. In the **Container-Key Generator** field, click Search and select **All Employees**.
8. Click **Create**.
9. The Schedule Rule tab autopopulates and displays. In the Containers Keys island, **Container Key Field**, enter **EmployeeNumber**.
10. In the **Run As** field, choose **Employee** for smaller scope or **User** for wider scope.

11. In the Generator island, **Trigger Time Pattern** field, enter **0 0 * * ***. This indicates the scheduling pattern which controls the frequency of the synchronization, every day at 00:00.

    Read more about patterns in "Pattern syntax help".

12. Click Activate to activate the rule.

Maconomy Setup in MConfig

Maconomy requires a gateway URL and token to Talent Management. The URL and token are entered in MConfig.

To enter the URL and token in MConfig, complete the following steps:

1. Select **Application** overview and locate Deltek Talent Management integration island.
2. In the **Gateway URL** field, enter:

   https://soa.hrsmart.com/gateway.php

3. In the **Token** field, enter the authentication token, which is similar to the format below, while unique to each customer / system.

   123ASDF23ASDF5SDF23SDF56SDF

   For more information, see the document posted at the link below.

   https://docs.soa.hrsmart.com/main.php

Set Up Country and State Mapping

The Maconomy employee uses **Country** and **Name 5** fields for country and the state mapping. A Talent Management Country ID must map to **Country** and / or **Name 5** fields.

Once you create the country mapping, you can create the state mapping, if needed. Enter a Talent Management State ID and map to **Country** and / or **Name 5**.

The **Country** field can represent a country or a state, and the **Name 5** field can represent a country or a state.

The fields mapped from Deltek Talent Management to Maconomy are closed on employee. Thus the only way to update them is through Talent Management.

See the *Deltek Maconomy 2.3.x Enhancements Guide* for details on Country Mapping concepts.

To map countries between Talent Management and Maconomy, complete the following steps:

1. Click **Setup » Talent-Management Setup » Country Mappings** to set up Talent Management countries.
2. In the Talent-Management Country tab, **Talent Mgmt. Country** field, select the country from Talent Management and map to Maconomy country.

3. In Talent Management States sub-tab, in the **State Id., Talent Management** field, select the identification code of the state from Talent Management and map to Maconomy state.

Routine Procedures

During routine synchronizations, you must perform the standard Talent Management to Maconomy synchronization, then identify and correct errors.

Import New Hires

Import all new hires from Talent Management to Maconomy. For each new hire (user, in Talent Management), an Employee is created in Maconomy, and personal data is copied to this Maconomy employee. The users are marked as exported in Talent Management. Every Talent Management user will be updated with the linked Maconomy Employee ID number. The import derives information such as employee name, country, and company, listed in Field Mapping.

The integration is one way, except in this initial instance where Maconomy populates the Talent Management user with the related Maconomy Employee ID.

To import new hires, complete the following step:

1. Click **Setup » Talent Management Setup** and select the **Import New Hires from Talent Management** action.

Update Maconomy from Talent Management

You can manually synchronize Talent Management user data with already-linked Maconomy employees. Any changes to users in Talent Management are copied to Maconomy employees.

You can do this action for a single employee or for all employees.

Update All Employees

To update all employees, complete the following step:

1. Click **Setup » Talent Management Setup » Administration** and select the **Sync All Empl. with Talent Management** action.

Update Single Employee

To update a single employee, complete the following step:

1. Click **Human Resources » Employees » Employees** and select the **Sync. with Talent Management** action.

Link Existing Maconomy Employee to Existing Talent Management User

You can link an existing Maconomy employee to an existing Talent Management user. A Talent Management User ID should be entered on the Maconomy employee. After, Maconomy collects Talent Management user data and updates the existing Maconomy employee accordingly.

To link an existing Maconomy user with an existing Talent Management user, complete the following steps:

1. Click **Human Resources » Employees » Employees.**
2. In the Talent Management island, enter that user ID in the **User ID** field.

Remapping of Country and State

Countries and states can be remapped as needed. If an existing country entry changes, then existing mappings should be updated. The remapping does not affect the employees instantly, as the remapped countries or states are updated on the employee when the employee is updated with the latest Talent Management user changes.

Notice that the mapping of the countries and states are not updated if a country or a state name is changed in Talent Management. A responsible user of Maconomy must update the country mappings in Maconomy to reflect the country and the state changes in Talent Management.

To remap countries and / or states, complete the following step.

1. Click **Setup » Talent Management Setup » Talent Management Country** and select the actions to add, update, or delete a Talent Management Country and / or State as needed.
2. Follow the steps in Set Up Country and State Mapping to remap countries and states.

Common Errors

Multiple Emails

Error: One user / employee has two associated email addresses (one in Talent Management, and a different one in Maconomy).

Resolution: Review email addresses in both systems and determine which is the correct address. After, go into the system with the erroneous second address and delete it.

Required Column Is Not Present in the File

Error: The file is missing a required column and the integration cannot work without it.

Resolution: Review the data sent to Talent Management and make sure all columns specified as required were sent in the file / data stream.

Invalid Data in Optional field

Error: The data expected in one of the fields did not match its intended format. Most common issues are with Date formats (format should be yyyy-mm-dd (4 digits year **dash** 2 digits month **dash** 2 digits day.)

Resolution: Review the field and its data and make sure that the format is correct.

Column is Present in the File But Was Not Expected

Error: The file was being parsed and the system detected a column that does not belong to the required or optional list (the import does not understand that column). This could be because of a typo or the vendor's / client's specific file generator system. This will **not** affect anything, the data in that column will be **totally** ignored.

Resolution: Review the file headers and make sure they are correct. Make sure there are no typos in the name of the column.

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