Deltek

Deltek Costpoint® 8.0

Transfer Talent Management Data Preprocessor

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Transfer Talent Management Data

Use this screen to import and export information between Costpoint and Deltek Talent Management.

Before you run the import and/or export process, use the options on this screen to select the type of information that will be included in the integration.

> **Note:** This is a separately licensed product for the current release of Deltek Costpoint.

Display the Transfer Talent Management Data Screen

You access the Transfer Talent Management Data screen from the People domain.

> Click **People** » **Employee** » **Employee Interfaces** » **Transfer Talent Management Data**.

Contents of the Transfer Talent Management Data Screen

Use the fields and options to configure the Transfer Talent Management Data screen.

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options, if there are any, are also included in the saved parameter ID. You can change any of the associated selection defaults as necessary.

Field	Description
Parameter ID	Enter, or click Query ▼ to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made on the screen, such as PERIOD or QUARTERLY. When you save your record, all the selections made on the screen are stored with the parameter ID. Later, you can retrieve the parameter using **Query**. You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display on the screen, you can override the defaults.
Description	Enter, or click Query ▼ to select, a parameter description of up to 30 alphanumeric characters.

Integration Process Log

Field	Description
Log File Location	Enter, or click 🔍 to select, the location of the process log file.

Import

Field	Description
Employees	Select this check box to import new and rehired employees from Deltek Talent Management.
Log Employee Import Transactions	Select this check box to record employee import transactions in the process log file.
Import Salary Information Supervisor Data Instead of Manager Data	Select this check box to import Deltek Talent Management managers as supervisors into the **Supervisor** field on the Manage Employee Salary Information screen.
Employee Skills	Select this check box to import employee skills table data from Deltek Talent Management.
Log Employee Skills Import Transactions	Select this check box to record employee skills import transactions in the process log file.
Exclude Employees with Future Hire Dates	Select this check box to exclude employees with hire dates that are later than the import date.

Export

Field	Description
Changes since last export	Select this check box to include only changes since the last export. If this check box is not selected, a full export of the selected Costpoint values (employees, organizations/HR organizations, jobs, job templates, and/or labor locations) will be exported.

Employee Data

Field	Description
Employees	Select this check box to include employees in the export to Deltek Talent Management. Only employees with changes since the last export will be included if the **Changes since last export** check box is selected. Only employees with hire dates that are less than or equal to the system date will be exported.

Field	Description
Append Country Code to State Code for User Addresses Using	Select this check box to import the country code for employee addresses. The country code will be prefixed to the state/province code with a dash. For example, USA-NY.
Country Code Type	From the drop-down list, select the format of the country code in Deltek Talent Management. Valid options are: ▪ ISO2 Country Code ▪ ISO3 Country Code ▪ Costpoint Country Code This format will be used for the country code prefix.
Exclude US Addresses	Select this check box to exclude the country codes from the import for employees with U.S. addresses. U.S. addresses will not have the prefix.
Log Employee Export Transactions	Select this check box to record employee export transactions in the process log file.
Export Salary Information Supervisor Data instead of Manager Data	Select this check box to export the supervisors instead of the managers from the Manage Employee Salary Information screen to Deltek Talent Management.
Employee Skills	Select this check box to export employee skills table data to Deltek Talent Management.
Log Employee Skills Export Transactions	Select this check box to record employee skills export transactions in the process log file.
Exclude Employees with Termination Dates before <Threshold Date>	Select this check box to exclude employees that have a termination date prior to the date you specify on the screen. This is intended to be used only for full export of employees or you are not running the export with the **Changes since last export** check box selected. This check box will only be available if the **Changes since last export** check box is not selected and the **Export** - **Employees** check box is selected. If selected, enter a value in the unlabeled **Threshold Date** field.
Threshold Date	In this unlabeled field, enter, or click to select, the threshold date at which employee's with termination dates less than the specified date will not be included in the export to Deltek Talent Management. This is intended to be used only for full export of employees or if you are not running the export with the **Changes since last export** check box selected. This check box will only be available if the **Changes since**

Field	Description
	last export check box is not selected and the **Export** - **Employees** and **Exclude Employees with Termination Dates before <Threshold Date>** check boxes are selected. If **Exclude Employees with Termination Dates before <Threshold Date>** is selected, enter a date in this field.

Table Data

Field	Description
Organizations	Select this check box to include organizations in the export to Deltek Talent Management. Only organizations with changes since the last export will be included if the **Changes since last export** check box is selected.
Log Organization Export Transactions	Select this check box to record organization export transactions in the process log file.
Job Templates	Select this check box to include Job Templates in the export to Deltek Talent Management. In order for Costpoint to provide a more complete employee-setup data for a new employee, a Job Template should be set up in Costpoint and tied to the employee in Deltek Talent Management. When that new employee is imported into Costpoint, the Job Template ID will be used to determine missing employee data. Only job templates with changes since the last export will be included if the **Changes since last export** check box is selected.
Log Job Template Export Transactions	Select this check box to record job template export transactions in the process log file.
Detail Job Titles	Select this check box to include Detail Job Titles in the export to Deltek Talent Management. These are referred to as Jobs Profiles in Deltek Talent Management. Only Detail Job Titles with changes since the last export will be included if the **Changes since last export** check box is selected.
Log Detail Job Title Export Transactions	Select this check box to record detail job title export transactions in the process log file.
Labor Locations	Select this check box to include labor locations in the export to Deltek Talent Management. Only labor locations with changes since the last export will be included if the **Changes since last export** check box is selected.
Log Job Templates Export Transactions	Select this check box to record labor location export transactions in the process log file.

Field	Description
Project Teams	Select this check box to export project team data to Deltek Talent Management.
Log Project Team Export Transactions	Select this check box to record project team export transactions in the process log file.
Skills	Select this check box to include skill codes and descriptions in the export to Deltek Talent Management.
Log Skills Export Transactions	Select this check box to record skills data export transactions in the process log file.

Table Information for the Transfer Talent Management Data Screen

Changes to the Transfer Talent Manage Data screen update several tables.

Updated tables include:

- DFLT_REG_TS_STG
- EMPL
- EMPL_STG
- EMPL_PHONE
- EMPL_PHONE_STG
- EMPL_LAB_INFO
- EMPL_LAB_INFO_STG
- EMPL_TAX
- EMPL_TAX_STG
- H_EMPL_SKILLS

Costpoint - Talent Management Integration

You need to install required Costpoint packages and set up the data to transfer employee-related information between Costpoint and Deltek Talent Management.

Talent Management Integration Overview

The integration between Costpoint and Deltek Talent Management utilizes existing and new APIs in the Talent Management.

Within Costpoint the integration is performed in the Transfer Talent Management Data application. This application can be run on demand or scheduled via process server. It handles both export of data to Talent Management, initial load and synchronization, and import of new hires into Costpoint from Talent Management.

Talent Management Integration Connection Settings

In order for integration between Costpoint and Deltek Talent Management to work, you must enable Talent Management integration in the Costpoint Configuration Utility and enter the proper connection settings.

To configure the Costpoint - Talent Management Integration connection settings:

1. Open the Costpoint Configuration Utility and click **Costpoint** » **Talent Management**.
2. Select the **Use Talent Management Integration** check box to allow the integration.
3. In the **Talent Management URL Options** group box, select the option for site of the web service that you will use. The following are the available options:
   - **Production**: Select this option to set **Talent Management Web Service URL** value to **https://soa.hrsmart.com**.
   - **Development**: Select this option to set **Talent Management Web Service URL** value to **https://soadev.hrsmart.com**.
   - **Other**: Select this option to enter a custom site in the **Talent Management Web Service URL** field.
4. Enter the Talent Management connection details in the following fields:
   - **Talent Management Web Service URL** – If you selected either **Production** or **Development** option in the **Talent Management URL Options** group box, this field is disabled and it displays predefined values based on the option you selected. If you selected the **Other** option in the **Talent Management URL Options** group box, enter the Talent Management web service site that you will use for integration. For example, **https://costpointsoa.appdev.hua.hrsmart.com**. When you enter a custom URL, do not include the path "/API/gateway.php".
   - **Password (Auth Token)**: Enter the authentication token provided by Talent Management.
   - **Confirm Password**: Enter the authentication token again to confirm the value.

- **Number of Rows Per Call**: Enter the number of records (from 1 to 24999) to be sent per call to the web service.
- **Connection Timeout (sec)**: Enter the time in seconds for Costpoint to wait for a connection before a time-out occurs.
- **Request Timeout (sec)**: Enter the time in seconds for Costpoint to wait for a response, once a request has been sent, before a time-out occurs.

5. Click **Test** to check if the connection settings are correct.
6. Restart all WebLogic servers or run the Rebuild Global Settings screen in Costpoint to allow the changes to take effect.

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

Talent Management Integration Implementation

This topic lists the steps that you need to perform in order to allow the transfer of information between Costpoint and Deltek Talent Management.

> **Note: Before performing the steps in this topic, you must first ensure that the connection settings between Costpoint and Talent Management are properly set up. For more information, please refer to the Costpoint 7.1.1 Deltek Talent Management Integration Technical Guide.**

To allow the transfer of information between Costpoint and Talent Management:

1. Create or update organizations in Costpoint in Manage Organization Structures and Manage Organization Elements screens.
2. Create or update Jobs in Manage Detail Job Titles. This is an optional step and only applies if you are licensed for Costpoint Human Resources (HR).
3. Create records for the Detail Job Titles in Manage Detail Position Descriptions. This is an **optional** step and you may want to maintain the detail descriptions in Talent Management instead.
4. Create or update Job Template in Manage Job Templates. All requisitions/job templates are exported in Talent Management. All requisitions/job templates are exported in Talent Management. This is an **optional** step. However, it provides more intelligent defaults for Costpoint data attributes for new hires.
5. Make sure that employees in Costpoint have values on the following fields. These fields are required fields in Talent Management.
   - Work email address
   - Home email address
6. This step is optional. For the approvers in Talent Management, to include human resources (HR) representative data in the integration, go to the Configure Personnel Settings screen and select your **Manager Defaulting Method** which can be either **By Company-wide Organization** or **By HR Organization**. Then, assign managers/HR

representatives to company-wide organizations or HR organizations in one of the following screens:

- If your **Manager Defaulting Method** is **By Company-wide Organization**, use the Manage Managers/HR Reps by Organization screen.
- If your **Manager Defaulting Method** is **By HR Organization**, use the Manage Managers/HR Reps by HR Organization screen.

7. Go to Transfer Deltek Talent Management Data screen and select the type of data to be included in the integration.

Scheduling a Talent Management Integration

If you prefer to run the integration at a later time, you can use the Job Management utilities in Costpoint Administration to schedule a job for the Costpoint – Deltek Talent Management Integration process.

Warning: You must create and save a Parameter ID in the Transfer Talent Management Data screen before using this procedure.

To create schedule a job for the integration:

1. Go to Manage Jobs screen and then create a job for the Parameter ID that you created in the Transfer Talent Management Data screen. The Job Operations table must have a row with the following settings:
   - **Application**: Enter, or click to select, **EMPHRSDAT**.
   - **Parameter**: Enter, or click to select, the **Parameter ID** that you created on the Transfer Talent Management Data screen.
2. Go to the Manage Job Queues screen and use Query to display the list of available Job Queues. Take note of the **Job Queue ID** and **Attached Servers** that you will use for the processing of the job.

   Note: The Manage Job Queues screen is normally restricted to a system administrator for the purpose of creating and managing job queues in Costpoint.
3. Go to the Submit Job to Queue screen and submit the **Job ID** to the job queue.
   - Query the **Job ID** from the Manage Jobs screen.
   - Enter, or click to select, the **Job Queue ID** from the Manage Job Queues screen.
   - Use the fields on the screen to schedule the start time/date and recurrence of the job.
   - Click **Submit to Queue**.
4. Go to the Start/Stop Job Server screen and start the server attached to the Job Queue.
   - On the **Job Servers** table, locate the **Attached Server** name from the Manage Job Queues screen.
   - Click **Start**.

5. When the process completes, the system sends a notification to the email list in the **Email Notification** group box of the Configure System Settings screen.

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