

Deltek Costpoint®

Deltek Talent Management Integration Enhancements

July 10, 2018

While Deltek has attempted to verify that the information in this document is accurate and complete, some typographical or technical errors may exist. The recipient of this document is solely responsible for all decisions relating to or use of the information provided herein.

The information contained in this publication is effective as of the publication date below and is subject to change without notice.

This publication contains proprietary information that is protected by copyright. All rights are reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, or translated into another language, without the prior written consent of Deltek, Inc.

This edition published July 2018.

© Deltek, Inc.

Deltek's software is also protected by copyright law and constitutes valuable confidential and proprietary information of Deltek, Inc. and its licensors. The Deltek software, and all related documentation, is provided for use only in accordance with the terms of the license agreement. Unauthorized reproduction or distribution of the program or any portion thereof could result in severe civil or criminal penalties.

All trademarks are the property of their respective owners.



Contents

Overview 1

Pre-Installation Information.....2

 System Requirements.....2

 Application JAR Requirements 2

Deltek Talent Management Integration Enhancements 3

 Automatically Assign Employee ID and Import Partial Employee Records 3

 Configure Labor Settings (LDMLABOR) 3

 Import Employee Data (AOPUTLEL) 3

 Link Talent Management User IDs to Existing Employees (EMPTMUI) 3

 Manage Employee ID Defaulting Rules (EMMIDDEFAULT) 4

 Manage Employee ID Formats (EMMIDFORMAT)..... 4

 Manage Employee Information (LDMEINFO) 4

 Print Data Dictionary Report..... 4

 Set Up Company (SYPCOMP) 5

 Transfer Talent Management Data (EMPHRSDAT) 5

 View Employee Information (PRQEINFO) 5

 Onboarding of Rehired Employees..... 5

 Manage Employee Information (LDMEINFO) 5

 Transfer Talent Management Data (EMPHRSDAT) 5

 Populate the Last Day Worked Field Based on the Termination Date 6

Initialize Talent Management HUA ID-to-Costpoint Employee ID Mapping 7

 Scenarios 7

 Scenario 1 7

 Scenario 2 8

 Scenario 3 9

 Scenario 4 10

 Errors 11

Known Issues 12

 Employees not Terminated in Costpoint were Processed as a Rehire 12

Appendix A: For Additional Information 13

 Deltek Support Center 13

 Access Deltek Support Center 13

Overview

This Costpoint release provides the following enhancements to Costpoint - Deltek Talent Management integration:

- Automatically assign employee IDs and accept partial employee records
- Onboarding of rehired employees
- Populate the **Last Day Worked** field based on the termination date

Pre-Installation Information

System Requirements

This enhancement requires the following Costpoint 7.1.1 releases:

- System JAR 037
- PATCH3321
- PATCH3218
- PATCH3224
- PATCH3454
- PATCH3457

Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

Domain	Module	Application ID	Application Name	Application File
Administration	System Administration	SYPCOMP	Set Up Company	cp711_sypcomp_021.zip
People	Employee	AOPUTLEL	Import Employee Data	cp711_aoputlel_016.zip
People	Employee	EMMIDDEFAULT	Manage Employee Defaulting Rules	cp711_emmiddefault_001.zip
People	Employee	EMMIDFORMAT	Manage Employee ID Formats	cp711_emmidformat_001.zip
People	Employee	EMPHRSDAT	Transfer Talent Management Data	cp711_emphrsdat_015.zip
People	Employee	EMPTMUI	Link Talent Management User IDs to Existing Employees	cp711_emptmui_001.zip
People	Employee	LDMEINFO	Manage Employee Information	cp711_ldmeinfo_022.zip
People	Labor	LDMLABOR	Configure Labor Settings	cp711_ldmlabor_008.zip
People	Payroll	PRQEINFO	View Employee Information	cp711_prqeinfo_005.zip

Deltek Talent Management Integration Enhancements

Automatically Assign Employee ID and Import Partial Employee Records

This release provides the ability to auto-generate employee IDs in Costpoint. If you use Deltek Talent Management, you can now import employee records that do not have employee ID values and allow Costpoint to auto-generate the IDs. The auto-generate employee ID function is available to all Costpoint users when manually entering an employee record. Only Deltek Talent Management users may import employees without employee IDs and have them auto generated.

Warning: If you use Deltek Talent Management; after you download this feature from DSM, you must perform the applicable procedure in the [Initialize Talent Management HUA ID-to-Costpoint Employee ID Mapping](#) section. Otherwise, the integration process between Costpoint and Deltek Talent Management will **no** longer function.

Configure Labor Settings (LDMLABOR)

- The Employee Options tab contains a new **Auto-Generate Employee IDs** check box enables the functionality to automatically generate IDs for new employees. This check box displays as selected and disabled if you select the **Auto-Generate Employee IDs for All Companies** check box on the Corporate Labor Settings subtask. This functionality is currently only available for Deltek Talent Management users.
- The Corporate Labor Settings subtask contains a new **Auto-Generate Employee IDs for All Companies** check box. Select this check box to enable Costpoint to automatically generate new employee IDs for companies within the corporation.

Import Employee Data (AOPUTLEL)

If you select the **Auto-Generate Employee IDs** check box on the Configure Labor Settings screen, the following error message displays when you attempt to open the Import Employee Data screen: "When auto-generation of employee IDs is enabled in your company's Configure Labor Setting screen, you may not import any new employee IDs."

Link Talent Management User IDs to Existing Employees (EMPTMUI)

When you run this new toolkit, it will populate the Costpoint Employee (EMPL) table with each applicable employee's Deltek Talent Management user ID (HUA ID). It will also set the **Active HUA ID Mapping** flag which indicates whether the Costpoint Employee has an active or inactive mapping to the HUA ID.

Attention: The timing of this toolkit depends on whether you're an existing Costpoint 7.1.1 user, an existing Deltek Talent Management user, an existing client for both Costpoint 7.1.1 and Deltek Talent Management, or a new user for both products.

You must run this toolkit after installing the Auto-Assign Employee IDs feature and before importing or exporting employees in the Transfer Talent Management Data screen. Running this toolkit will populate the Deltek Talent Management HUA ID (HUA_ID) and Active HUA ID Mapping (HUA_ACTV_MAP_FL) columns in the Manage Employee Information (EMPL) table.

For detailed steps on using this toolkit, please refer to the [Talent Management HUA ID-to-Costpoint Employee ID Mapping Initialization Scenarios](#) section.

Manage Employee ID Defaulting Rules (EMMIDDEFAULT)

Use the new Manage Employee Defaulting Rules screen to enter and manage defaulting rules for your employee ID format codes.

Note: You can access the Manage Employee ID Defaulting Rules screen only if you select the **Auto-Generate Employee IDs** check box on the Configure Labor Settings screen. Otherwise, an error will display when you attempt to open the application.

You must establish employee ID defaulting rules in the following scenarios:

- If you selected the **Auto-Generate Employee IDs** check box on the Configure Labor Settings screen for companies, you must establish employee ID defaulting rules for each of company that has this labor setup.
- If you selected the **Auto-Generate Employee IDs for All Companies** check box on the Corporate Labor Settings subtask of the Configure Labor Settings screen, you must establish at least one defaulting rule for all companies or you can establish defaulting rules for each company.

To launch the screen, go to the **People » Employee » Employee Controls** menu.

Manage Employee ID Formats (EMMIDFORMAT)

Use the new Manage Employee ID Formats screen you to establish the formatting of employee IDs. Costpoint will use this format when you opt to auto-generate the employee IDs.

Note: You can access the Manage Employee ID Formats screen only if you select the **Auto-Generate Employee IDs** check box on the Configure Labor Settings screen. Otherwise, an error will display when you attempt to open the application.

To launch the screen, go to the **People » Employee » Employee Controls** menu.

Manage Employee Information (LDMEINFO)

The following are updates on the Manage Employee Information screen:

- A new **HUA ID** field allows you to enter the Talent Management user ID for the employee. The application uses this field to map Costpoint employee IDs to Deltek Talent Management user IDs when you import employee data into Costpoint.
- A new **Talent Management Active HUA ID Mapping** check box indicates whether or not the specified HUA ID is actively mapped to the Costpoint employee. If this check box displays as selected, the Transfer Talent Management Data application uses the specified HUA ID to determine whether or not the employee is a rehire.
- The application performs a validation to check the staging database tables when an adding an employee.

Print Data Dictionary Report

The Print Data Dictionary Report application now provides information for the following new columns on the Employee (EMPL) table:

- **HUA_ACTV_MAP_FL** — Flag that indicates if the employee's HUA ID is active.
- **HUA ID** — HUA ID sent from Talent Management.

Set Up Company (SYPCOMP)

When you create a new company, the application populates the EMPL_ID_AUTOGEN_FL column in the LAB_SETTINGS database based on the values of the company being copied.

Transfer Talent Management Data (EMPHRSDAT)

- When you run the Transfer Talent Management Data process, the application generates employee IDs for imported Deltek Talent Management employee records without IDs.
- The application adds employee records to staging database tables if the Deltek Talent Management records are missing any required fields. The application will not add records to staging database tables if the employee ID is missing and auto-generation of employee IDs is not enabled.
- The application performs validations to ensure that the imported file from Deltek Talent Management contains all fields required to generate an employee ID. The application will not add records to the staging database tables if it could not generate an employee ID.
- The application removes the employee records from the staging database tables once a complete employee record is sent from Deltek Talent Management.
- The application uses the following staging database tables:
 - EMPL_STG
 - EMPL_PHONE_STG
 - EMPL_LAB_INFO_STG
 - DFLT_REG_TS_STG
 - EMPL_TAX_STG

View Employee Information (PRQEINFO)

The screen contains new a **HUA ID** field and a **Talent Management Active HUA ID** Mapping check box. These display the information from the same fields on the Manage Employee Information screen.

Onboarding of Rehired Employees

This feature provides the ability to include rehires when importing employees that have completed the onboarding process in Deltek Talent Management. Importing of an existing Costpoint employee ID that was rehired to a different company is **not** supported at this time.

Manage Employee Information (LDMEINFO)

The application was updated to support the processing of rehired employee records that were imported from Deltek Talent Management to Costpoint through the Transfer Talent Management Data process.

Transfer Talent Management Data (EMPHRSDAT)

The following are the updates to the Transfer Talent Management Data screen for the onboarding of rehires:

- The application process can now identify new hires and rehires. It also determines and identifies when a new employee record needs to be generated or if an existing record will be updated.
- When exporting employees, the application will not include employee records that does not have an active mapping to a HUA ID (Talent Management User ID). An employee record does not have an active mapping if the **HUA_ID_ACTV_AP_FL** column is **N**.

- When importing rehires, if the employee record in Costpoint indicates that the employee is still employed (either the **Termination Date** field is blank or the **Termination Date** value is later than the rehire date), an error will be logged, and the rehired employee will not be imported.

Populate the Last Day Worked Field Based on the Termination Date

When you enter a value in the **Termination Date** field on the Manage Employee Information screen, the screen displays a warning message which provides you the option to populate the **Last Day Worked** field with the date that you entered in the **Termination Date** field. If you decline the option to auto-populate the **Last Day Worked** field, you must manually enter a date in the **Last Day Worked** field before saving the record.

Existing termination records will not be affected by this update and the warning message will only display for future termination records.

Initialize Talent Management HUA ID-to-Costpoint Employee ID Mapping

Before you use Costpoint's Auto-Assign Employee ID feature, you must run the Link Talent Management User IDs to Existing Employees (EMPTMUI) toolkit based on your current Costpoint/Deltek Talent Management setup.

You must run the Link Talent Management User IDs to Existing Employees toolkit after downloading the Auto-Assign Employee IDs feature and before importing or exporting employees in the Transfer Talent Management Data screen. Running this toolkit will populate the HUA ID and Active HUA ID Mapping columns in the Manage Employee Information table (EMPL.HUA_ID and EMPL.HUA_ACTV_MAP_FL).

Scenarios

Refer to the following scenarios and perform the corresponding steps that apply to your company's setup:

Scenario 1

You currently use both products, Costpoint 7.1.1 and Deltek Talent Management, and you installed Costpoint's Auto-Assign Employee ID feature which was released in June 2018.

Step	Product	Details
1	Deltek Talent Management	Generate the export_user_id_file file in Deltek Talent Management's Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs.
2	Costpoint	Use the export_user_id_file file you just generated in Deltek Talent Management to run the People » Employee » Employee Utilities » Link Talent Management User IDs to Existing Employees toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management.
3	Costpoint	Determine if you want to allow Costpoint to auto generate employee IDs. Warning: If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file. <ul style="list-style-type: none"> If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step 4. If you do not want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management.
4	Costpoint	Go to People » Labor » Labor Controls » Configure Labor Settings screen, select the Auto-Generate Employee IDs check box, and then save the record.
5	Costpoint	Go to Administration » System Administration » System Administration Utilities » Rebuild Global Settings screen, select the Labor option in the Individual Settings group box, and then run the application process.

Scenario 2

You currently use Deltek Talent Management and you purchased Costpoint version 7.1.1 after May 2018.

Step	Product	Details
1	Costpoint	<p>Go to People » Labor » Labor Controls » Configure Labor Settings screen, and ensure that the Auto-Generate Employee IDs check box is not selected.</p> <hr/> <p>Note: If the Auto-Generate Employee IDs check box is selected, clear the check box. After saving your changes, go to the Rebuild Global Settings screen, select the Labor option in the Individual Settings group box, and then run the application process.</p> <hr/>
2	Costpoint	<p>Create employee records in Costpoint. You can create employee records by performing either of the following methods:</p> <ul style="list-style-type: none"> ▪ Entering employee records on People » Employee » Basic Employee Information » Manage Employee Information screen ▪ Importing an employee file on People » Employee » Employee Interfaces » Import Employee Data screen.
3	Deltek Talent Management	Manually assign the newly created Costpoint employee IDs to your existing Talent Management users.
4	Deltek Talent Management	Generate the export_user_id_file file in Deltek Talent Management's Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs.
5	Costpoint	Use the export_user_id_file file you just generated in Deltek Talent Management to run the People » Employee » Employee Utilities » Link Talent Management User IDs to Existing Employees toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management.
6	Costpoint	<p>Determine if you want to allow Costpoint to auto generate employee IDs.</p> <hr/> <p>Warning: If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file.</p> <hr/> <ul style="list-style-type: none"> ▪ If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step 4. ▪ If you do not want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management.
7	Costpoint	Go to People » Labor » Labor Controls » Configure Labor Settings screen, select the Auto-Generate Employee IDs check box, and then save the record.
8	Costpoint	Go to Administration » System Administration » System Administration Utilities » Rebuild Global Settings , select the Labor option in the Individual Settings group box, and then run the application process.

Scenario 3

You currently use Costpoint 7.1.1 and you purchased Deltek Talent Management after May 2018.

Step	Product	Details
1	Costpoint	<p>Go to People » Employee » Employee Interface » Transfer Talent Management Data screen, and run a full export of the following:</p> <ul style="list-style-type: none"> ▪ Employees ▪ Organizations ▪ Job Templates ▪ Detail Job Titles ▪ Labor Locations <hr/> <p>Note: You may opt to exclude employees that were terminated before a specific date.</p>
2	Deltek Talent Management	<p>Generate the export_user_id_file file in Deltek Talent Management's Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs.</p>
3	Costpoint	<p>Use the export_user_id_file file you just generated in Deltek Talent Management to run the Link Talent Management User IDs to Existing Employees toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management.</p>
4	Costpoint	<p>Determine if you want to allow Costpoint to auto generate employee IDs.</p> <hr/> <p>Warning: If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file.</p> <hr/> <ul style="list-style-type: none"> ▪ If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step 5. ▪ If you do not want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management.
5	Costpoint	<p>Go to People » Labor » Labor Controls » Configure Labor Settings screen, select the Auto-Generate Employee IDs check box, and then save the record.</p>
6	Costpoint	<p>Go to Administration » System Administration » System Administration Utilities » Rebuild Global Settings screen, select the Labor option in the Individual Settings group box, and then run the application process.</p>

Scenario 4

You purchased both products, Costpoint 7.1.1 and Deltek Talent Management, after May 2018.

Step	Product	Details
1	Costpoint	<p>Create employee records in Costpoint. You can create employee records by performing either of the following methods:</p> <ul style="list-style-type: none"> ▪ Entering employee records on People » Employee » Basic Employee Information » Manage Employee Information screen ▪ Importing an employee file on People » Employee » Employee Interfaces » Import Employee Data screen.
2	Costpoint	<p>Go to People » Employee » Employee Interface » Transfer Talent Management Data screen, and run a full export of the following:</p> <ul style="list-style-type: none"> ▪ Employees ▪ Organizations ▪ Job Templates ▪ Detail Job Titles ▪ Labor Locations
3	Deltek Talent Management	<p>Generate the export_user_id_file file in Deltek Talent Management's Administration » Global Settings » Integration Setup » Costpoint » Costpoint Configuration Check screen. This file maps the Talent Management user IDs (HUA IDs) to the Costpoint Employee IDs.</p>
4	Costpoint	<p>Use the export_user_id_file file you just generated in Deltek Talent Management to run the Link Talent Management User IDs to Existing Employees toolkit. You must complete this step before you will be able to import new users from Deltek Talent Management.</p>
5	Costpoint	<p>Determine if you want to allow Costpoint to auto generate employee IDs.</p> <hr/> <p>Warning: If you choose to auto-generate employee IDs, you will not be able to use Costpoint's Import Employee Data application to import employees using a data file.</p> <hr/> <ul style="list-style-type: none"> ▪ If you would like Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, proceed to Step 6. ▪ If you do not want Costpoint to auto-generate Employee IDs for new hires that come from Deltek Talent Management, you have completed the required steps and are ready to start importing new hires from Deltek Talent Management.
6	Costpoint	<p>Go to People » Labor » Labor Controls » Configure Labor Settings screen, select the Auto-Generate Employee IDs check box, and then save the record.</p>
7	Costpoint	<p>Go to Administration » System Administration » System Administration Utilities » Rebuild Global Settings screen, select the Labor option in the Individual Settings group box, and then run the application process.</p>

Errors

All warnings and errors are written to a log file (EMPTMUI_yymmddhhTms.log). The log file will be saved in the location that you specified in the **File Location** field of the Link Talent Management User IDs to Existing Employees toolkit. If a location has not been specified, warnings and errors will be written to the database and you can retrieve it from the File Download (SYMDLMGR) screen.

Known Issues

Employees not Terminated in Costpoint were Processed as a Rehire

Deltek Defect Tracking Number: 963051

Description: When the **Talent Management Active HUA ID Mapping** column contains a value of **No** and the employee has not been terminated in Costpoint, the Transfer Talent Management Data screen still allows you to successfully import a rehired employee record into Costpoint.

Regardless of the value of **Talent Management Active HUA ID Mapping** column, the processing of rehires should not be successful if the Costpoint employee record has no termination date.

Customers Impacted: This defect affects Costpoint - Deltek Talent Management Integration users.

Workaround Before Fix: None.

Additional Notes: The application performs a validation only if the employee has both a termination date and an active HUA ID mapping. The HUA ID mapping must be active if there is no termination date as of the Deltek Talent Management hire date.

Appendix A: For Additional Information

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <http://support.deltek.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

Deltek is the leading global provider of enterprise software and information solutions for government contractors, professional services firms and other project- and people-based businesses. For decades, we have delivered actionable insight that empowers our customers to unlock their business potential. 20,000 organizations and millions of users in over 80 countries around the world rely on Deltek to research and identify opportunities, win new business, recruit and develop talent, optimize resources, streamline operations and deliver more profitable projects. Deltek – Know more. Do more.®

deltek.com