Deltek Costpoint® 8.0

GovWin IQ Integration Setup Guide

May 18, 2021

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.

Contents

Overview

GovWin IQ captures public sector opportunities including vendor information retrieved from the System for Award Management (SAM.gov). Vendor information includes whether or not the vendor is on the government exclusion list and other data such as vendor classification codes. This list identifies those parties excluded from receiving federal contracts, certain subcontracts, and certain types of federal financial and non-financial assistance and benefits. It is important to have accurate data on the vendors included on this list as it could impact your ability to win an opportunity or receive payment on a contract.

To this end, Costpoint provides API integration screens (Import GovWin IQ Data and Import GovWin IQ Vendor Data) that transfer opportunity and vendor information from GovWin IQ into Costpoint. This eliminates the need for duplicate data entry and will ensure that the data is updated with no data entry errors. Opportunities and both vendor and prospective vendor information can be imported and updated.

Other existing screens have been enhanced to alert you if the vendor/subcontractor you selected is on the exclusion list. You still have an option to override the warning and save the vendor/subcontractor in the record if needed. A banner is displayed on select screens to provide you additional details on the exclusion for the vendor/subcontractor.

You can set up GovWin IQ and Costpoint integration for importing opportunities, vendor information, or both.

Follow the procedures in the following sections to set up GovWin IQ and Costpoint integration.

GovWin IQ Integration Administration

Before you can use GovWin IQ integration with Costpoint to import opportunities and vendor data, you need to set up the required OAuth credentials in GovWin IQ.

To set up OAuth credentials:

1. For Costpoint 8.0 or higher clients, contact your GovWin IQ Customer Success Manager to verify that the configuration type is for Costpoint 8.0.

   a. On the Org Edit form in MPS, enter the correct Costpoint version as the **CRM Connector Type**.

2. Access the Enable New Application screen and enter the following information:

   - **Application Name**: Enter your preferred name for the application.

   - **Application Type**: Select **Vantagepoint or Costpoint or CM or Vision CRM**.

3. Use the **Client ID & Secret** credentials created when GovWin IQ was initialized. This information is required to set up GovWin IQ integration with Costpoint. If you do not know this information, click the **Generate Client ID & Secret** button to recreate the credentials.

Costpoint Product Configuration Utility

Product Configuration Utility » GovWin IQ Tab (for SaaS clients)

For Costpoint SaaS clients, the Product Configuration Utility is maintained by the Deltek DCO team. The SaaS Administrator needs to complete the Costpoint Integration Setup Template, and then submit it with a Costpoint Integration Setup service request via the Deltek Support Center.

Submit a New Service Request

To submit a new service request in the Deltek Support Center:

1. Log into the Deltek Support Center: (https://deltek.custhelp.com/) and click **Cloud Solutions**.

2. On the drop-down list, select your Costpoint Cloud Product and click **Go**.

3. In the SERVICE REQUESTS section, click [?] to see the Knowledge Base links to all details about service requests and SLOs.
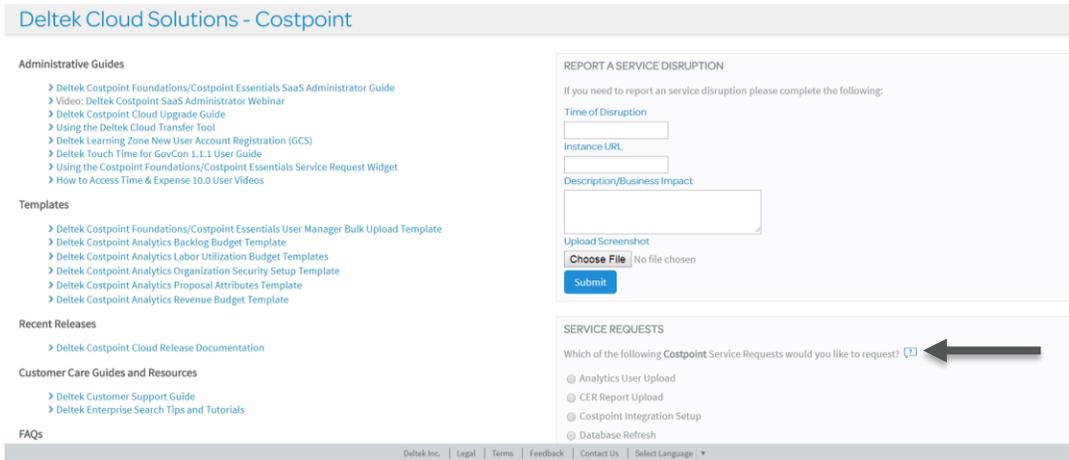
4. Under **Costpoint Integration Setup**, click **Costpoint Integration Setup Template**. Save and open the file.

5. Click the GovWin IQ tab in the file and in the Product Configuration Utility (New Setup) section, enter the following information:

   - **Client ID**: Enter the GovWin IQ Client ID. You can find this in **GovWin IQ » Support »Integration Administration**.
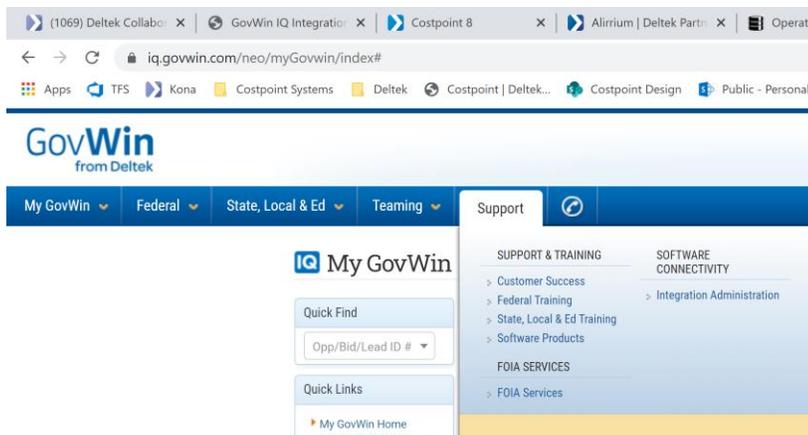
- **Client Secret:** This is saved by the client's System Administrator after it is generated in GovWin IQ and is no longer visible once saved.

> **Note:** To regenerate the Client Secret, open GovWin IQ, click **Support » Integration Administration**, select the application name, and click **Regenerate Client Secret**.
>
> Be aware that regenerating Client ID and Secret credentials will invalidate all the access tokens already granted to individual users for the application.

> **Warning:** Please use the Data Transfer Tool (https://dftx.deltekenterprise.com/) to securely submit your password(s). Refer to the instructional guide in the Administrative Guides section of the Deltek Cloud Solutions – Costpoint screen: **Using the Deltek Cloud Transfer Tool**.

- **Tenants | Tenant ID**: Enter the Tenant ID to be used in Costpoint to associate a specific GovWin IQ Login credential. It is also referred to as the **GovWin IQ Login Alias** on the Configure Opportunity Settings (CTMOPSET) screen, wherein the user selects the **Tenant ID** to be used for a company. This may be used by one or more companies in Costpoint.

  This can be up to 30 alphanumeric characters.

  For more information on Tenant IDs, see Special Topics at the end of this guide.

- **Tenants | User**: Enter the GovWin IQ username associated with the selected Tenant ID.

  This is the email address used to log into GovWin IQ.

- **Tenants | Password**: Enter the GovWin IQ password for the user associated with the selected Tenant ID.

> **Warning:** Please use the Data Transfer Tool (https://dftx.deltekenterprise.com/) to securely submit your password(s). Refer to the instructional guide in the Administrative Guides section of the Deltek Cloud Solutions – Costpoint screen: **Using the Deltek Cloud Transfer Tool**.

- **System Name**: This is the Costpoint system name which displays on the Costpoint login screen.

> **Note:** On the Costpoint login screen, click **Additional Criteria** and look for the **System** field. You can also find the system name when logged into Costpoint. Click the **User Preferences** icon on the upper right corner of the screen and look for the **System** field.

Field	Value	Instruction	Date Requested	Notes
Product Configuration Utility (New Setup) - Scroll down for <u>Changes</u>				
Client ID		Enter the Client ID provided by GovWin IQ in Support > Integration Administration screen. (Typically one per company)		
Client Secret		The Client Secret provided by GovWin IQ in Support > Integration Administration screen. This would have been saved by the client System Administrator after generation and is no longer visible in GovWin IQ after save. (Typically one per company) Please use the Data Transfer Tool (https:/fdftx.deltekenterprise.com/) to securely submit your password(s). Instructional Guide is found under Administrative Guides >> Using the Deltek Cloud Transfer Tool on Customer Connect Site.		
Tenants	Tenant ID		Enter a Tenant ID. The Tenant ID is used in Costpoint to associate a specific GovWin IQ Login credential and may be used by one or more companies in Costpoint.		
Tenants	User		Enter the GovWin IQ user associated with the selected Tenant ID. This is the email address used to log into GovWin IQ.		
Tenants	Password		The GovWin IQ password for the user associated with the selected Tenant ID. Please use the Data Transfer Tool (https:/fdftx.deltekenterprise.com/) to securely submit your password(s). Instructional Guide is found under Administrative Guides >> Using the Deltek Cloud Transfer Tool on Customer Connect Site.		
System Name		This is the Costpoint System Name which can be found on the Costpoint login screen, select Show Additional Criteria and look for the System field. This can also be found when logged into Costpoint, select the User Preferences icon in the upper right corner of the screen, look for the System field.		

6. In the SERVICE REQUESTS section, click **Costpoint Integration Setup**.

Deltek Cloud Solutions - Costpoint

Administrative Guides

> Deltek Costpoint Foundations/Costpoint Essentials SaaS Administrator Guide
> Video: Deltek Costpoint SaaS Administrator Webinar
> Deltek Costpoint Cloud Upgrade Guide
> Using the Deltek Cloud Transfer Tool
> Deltek Learning Zone New User Account Registration (GCS)
> Deltek Touch Time for GovCon 1.1.1 User Guide
> Using the Costpoint Foundations/Costpoint Essentials Service Request Widget
> How to Access Time & Expense 10.0 User Videos

Templates

> Deltek Costpoint Foundations/Costpoint Essentials User Manager Bulk Upload Template
> Deltek Costpoint Analytics Backlog Budget Template
> Deltek Costpoint Analytics Labor Utilization Budget Templates
> Deltek Costpoint Analytics Organization Security Setup Template
> Deltek Costpoint Analytics Proposal Attributes Template
> Deltek Costpoint Analytics Revenue Budget Template

Recent Releases

> Deltek Costpoint Cloud Release Documentation

Customer Care Guides and Resources

> Deltek Customer Support Guide
> Deltek Enterprise Search Tips and Tutorials

FAQs

REPORT A SERVICE DISRUPTION

If you need to report an service disruption please complete the following:

Time of Disruption

Instance URL

Description/Business Impact

Upload Screenshot

Choose File   No file chosen

Submit

SERVICE REQUESTS

Which of the following **Costpoint** Service Requests would you like to request?

- Analytics User Upload
- CER Report Upload
- Costpoint Integration Setup
- Database Refresh

Deltek Inc. | Legal | Terms | Feedback | Contact Us | Select Language ▼

7. Click **Choose File** and upload the template, and then click **Submit**. Alternatively, you can click the **Costpoint Integration Configuration Template** link.

8. Save your 13-character service request number. It is required when submitting passwords.

Submit a Password and Client Secret

To submit a password and Client Secret after submitting a service request:

1. In the Administrative Guides section of the Deltek Cloud Solutions – Costpoint screen, click **Using the Deltek Cloud Transfer Tool**.

   Follow the instructions for Encrypt and Upload Your Password to process your Client Secret and Tenant User Password.
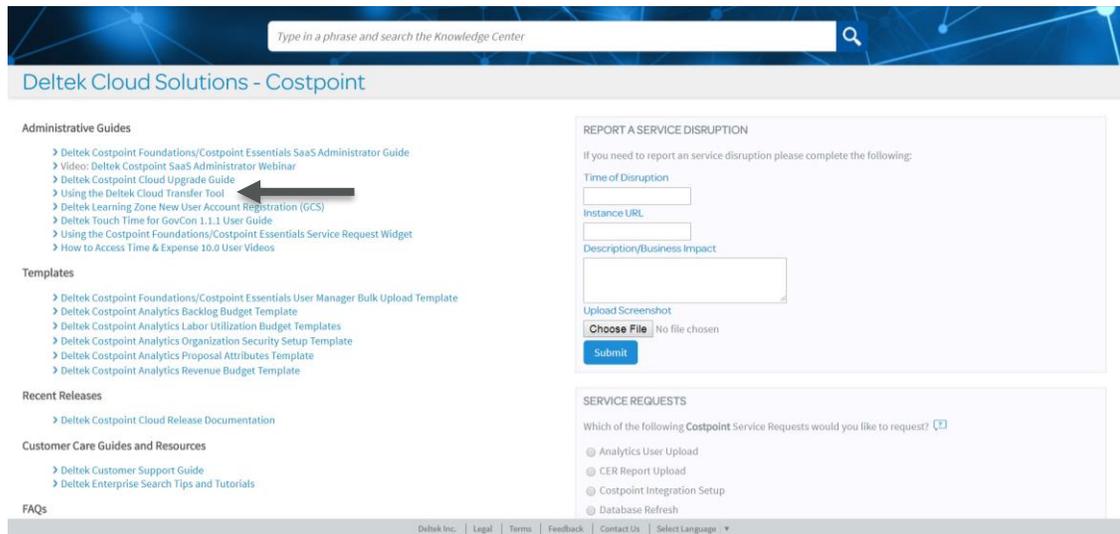
2. Click the link to launch the tool: https://dftx.deltekenterprise.com/.

   > **Note:** Use Internet Explorer to launch the tool.

3. Enter the following information:

   - **Client ID**: This is the 5 digit Costpoint Client ID. It displays on the upper-right corner on the Deltek Support Center portal.

   - **Service Request**: Enter the 13-digit number sent to you after you submitted the Costpoint Integration Setup service request. (step 8 of Submit a Service Request)

   - **File Type**: Select **Password**.

   - **Product Type**: Select **GovWin IQ**.

   - **Tenant ID**: Enter the Tenant ID you created on the Costpoint Integration Configuration template. (step 5 of Submit a Service Request)

   - **User Password**: Enter the GovWin IQ password of the user associated with the Tenant ID you entered on the Costpoint Integration Configuration template. (step 5 of Submit a Service Request)

   - **Client Secret**: Enter the Client Secret associated with the GovWin IQ Client ID you entered on the Costpoint Integration Configuration template. (step 5 of Submit a Service Request)

Deltek

Deltek File Transfer (Costpoint)

Enter Details to Encrypt

Client ID		5 digits
Service Request	_____-_____	Format : 000000-000000
File Type	Password ▼	
Product Type	Gov Win IQ ▼	
Tenant ID		
User Password		
Client Secret		

[Abort]   [Upload]

IMPORTANT!

Client ID
Use your company's Client ID, not your personal Contact ID.

Support Case Number
You need a Deltek support case number to upload your database.

This case
- Must be created by the SaaS administrator.
- Must be created using the Database Upload option.

Upload details

Status
File size
Uploaded
Transfer rate

Guideline
This will encrypt and transmit the either the GovWin IQ User Password for the Tenant ID identified or the Client Secret for the GovWin IQ Client ID to the Deltek Cloud Operations. Please provide only the password – do not include a user

Not Connected | 0% | Uploaded: _ _ / _ _ | Elapsed: 00:00:00 | v1.1.0.14

Submit a Modified Service Request

To submit a modified service request in the Deltek Support Center:

1. In the SERVICE REQUESTS section of the Deltek Cloud Solutions – Costpoint screen, click **Costpoint Integration Setup**.
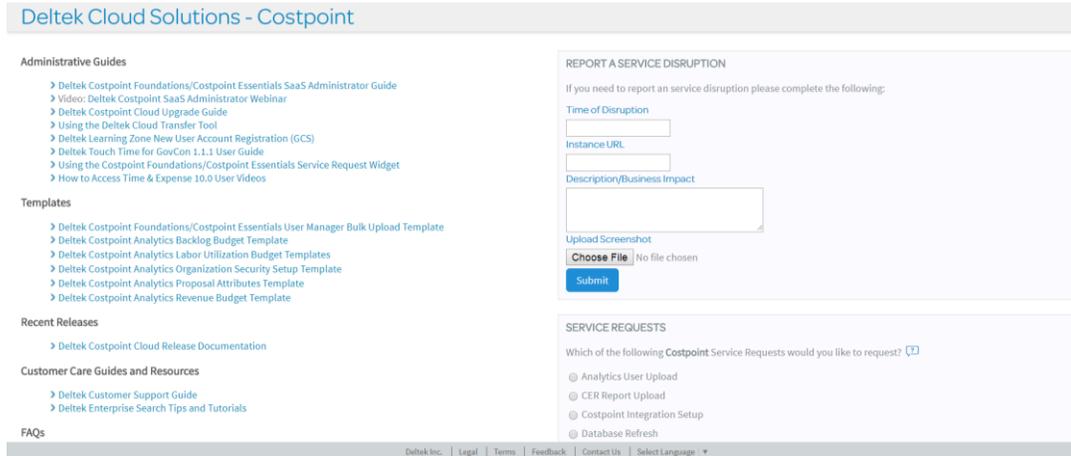
2. Under **Costpoint Integration Setup**, click **Costpoint Integration Setup Template**. Save and open the file.

3. Select the GovWin IQ tab in the file, and in the Product Configuration Utility (New Setup) section, enter the following information:

   - **Client Secret:** Enter the new Client Secret if it is regenerated in GovWin IQ.

     > **Note:** To regenerate the Client Secret, access **GovWin IQ » Support »Integration Administration**, select the application name, and click **Regenerate Client Secret**.
     >
     > Be aware that regenerating Client ID and Secret credentials will invalidate all the access tokens already granted to individual users for the application.

     > **Warning:** Please use the Data Transfer Tool (https://dftx.deltekenterprise.com/) to securely submit your password(s). Refer to the instructional guide in the Administrative Guides section of the Deltek Cloud Solutions – Costpoint screen: **Using the Deltek Cloud Transfer Tool**.

- **Tenants | Tenant ID**: Delete or enter a new Tenant ID used in Costpoint to associate a specific GovWin IQ Login credential. It is also referred to as **GovWin IQ Login Alias** on the Configure Opportunity Settings (CTMOPSET) screen. This may be used by one or more companies in Costpoint.

- **Tenants | User**: Delete or enter the new GovWin IQ username associated with the selected Tenant ID.

  This is the email address used to log into GovWin IQ.

- **Tenants | Password**: If you entered a new **User**, enter the GovWin IQ password for the user associated with the selected Tenant ID.

  If you entered an existing **User**, you can modify the existing user's password on the GovWin IQ Integration subtask of the Manage System Integration Accounts screen in Costpoint.

> **Warning:** Please use the Data Transfer Tool (https://dftx.deltekenterprise.com/) to securely submit your password(s). Refer to the instructional guide in the Administrative Guides section of the Deltek Cloud Solutions – Costpoint screen: **Using the Deltek Cloud Transfer Tool**.

- **System Name**: This is the Costpoint system name which displays on the Costpoint login screen.

> **Note:** On the Costpoint login screen, click **Additional Criteria** and look for the **System** field. You can also find the system name when logged into Costpoint. Click the **User Preferences** icon on the upper right corner of the screen and look for the **System** field.

Field	Old Value	New Value	Delete Record	Instructions	Date Requested	Notes
Product Configuration Utility (Changes)						
Client Secret				If the Client Secret has changed, please use the Data Transfer Tool (https://dftx.deltekenterprise.com/) to securely submit your password(s). Instructional Guide is found under Administrative Guides >> Using the Deltek Cloud Transfer Tool on Customer Connect Site.		
Tenants	Tentant ID				Deleting a Tenant ID, enter the Tentant ID in the 'Old Value' and select 'Yes' from the 'Delete Record' Column. New Tenant ID, enter Tentant ID under New Value column.		
Tenants	User				Deleting a User, enter the User in the 'Old Value' and select 'Yes' from the 'Delete Record' column. New User, enter the GovWin IQ user associated with the selected Tenant ID. This is the email address used to log into GovWin IQ.		
Tenant	Password				New Users, the GovWin IQ password for the user associated with the selected Tenant ID. Please use the Data Transfer Tool (https://dftx.deltekenterprise.com/) to securely submit your password(s). Instructional Guide is found under Administrative Guides >> Using the Deltek Cloud Transfer Tool on Customer Connect Site. Password changes to existing users can be made in Costpoints Manage System Integration Accounts screen under the GovWin IQ Integration subtask.		
System Name				This is the Costpoint System Name which can be found on the Costpoint login screen, select Show Additional Criteria and look for the System field. This can also be found when logged into Costpoint, select the User Preferences icon in the upper right corner of the screen, look for the System field.		

4. In the SERVICE REQUESTS section of the Deltek Cloud Solutions – Costpoint screen, click **Costpoint Integration Setup**.

5. Click **Choose File** and upload the modified template, and then click **Submit**. Alternatively, you can click the **Costpoint Integration Configuration Template** link.
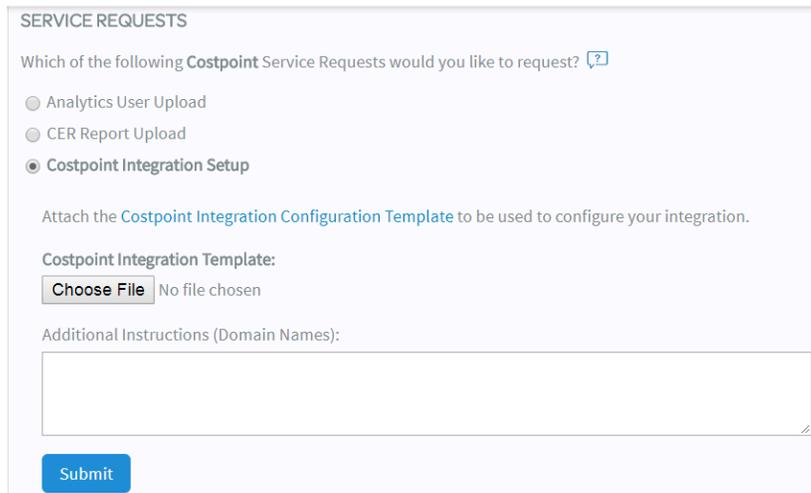
Product Configuration Utility (for On-Premises Clients)

If you are using Costpoint on-premises, you must use the on-premises Product Configuration Utility to set up Costpoint integration with GovWin IQ. This is maintained by your System or IT Administrator.

Configure Costpoint Integration with GovWin IQ

To configure Costpoint integration with GovWin IQ using the on-premises Product Configuration Utility:

1. Launch the Product Configuration Utility.

2. On the GovWin IQ tab, enter the following information:

   - **Use GovWin IQ Integration**: Select this check box to enable integration with GovWin IQ and to enable the rest of the fields.

   - **Client ID**: Enter which can be found in GovWin IQ under Support > Integration Administration screen. (typically one per company)

   - **Client Secret**: Enter the Client Secret provided by GovWin IQ in Support > Integration Administration screen. The Client Secret would have been saved by the clients System Administrator after generation in GovWin IQ and is no longer visible in GovWin IQ after save.

   > **Note:** To regenerate the Client Secret, open GovWin IQ and access **Support » Integration Administration**, select the application name, and click **Regenerate Client Secret**.
   >
   > Be aware that regenerating Client ID and Secret credentials will invalidate all the access tokens already granted to individual users for the application.

   - **Connection Timeout (sec)**: Enter the amount of time Costpoint will wait for GovWin IQ to respond during a connection. The default value is **60** seconds.

   - **Request Timeout (sec)**: Enter the amount of time Costpoint will wait for GovWin IQ to respond when transferring data. The default value is **3600** seconds.
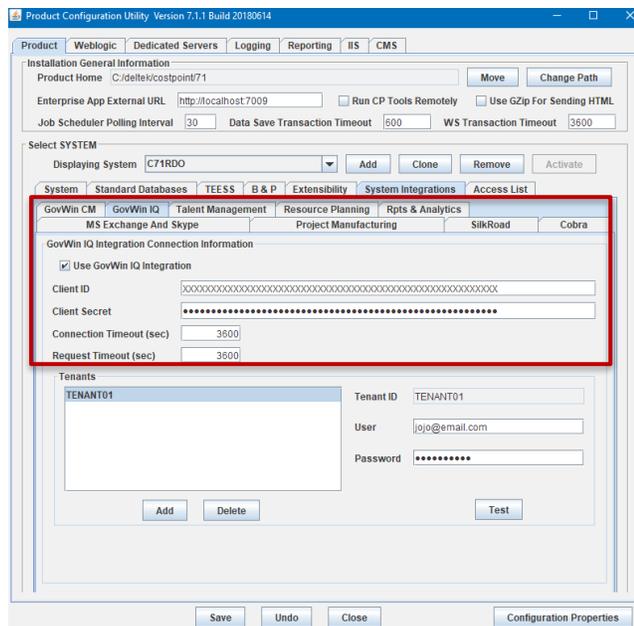
3. In the Tenants section, enter the following information:

- **Tenant ID**: Click **Add** to enter a Tenant ID to be used in Costpoint to associate a specific GovWin IQ Login credential. This may be used by one or more companies. It is also referred to as **GovWin IQ Login Alias** on the Configure Opportunity Settings (CTMOPSET) screen, wherein the user selects the Tenant ID to be used for a company.

- For more information on Tenant IDs, see Special Topics at the end of this guide.

- **User**: Enter the GovWin IQ username associated with the selected Tenant ID.

- This is the email address used to log into GovWin IQ.

- **Password**: Enter the GovWin IQ password for the user associated with the selected Tenant ID.

- **Test**: Click this button to test the connection to GovWin IQ using the **User** and **Password** you entered.

- **Delete**: Click this button to delete the Tenant ID.
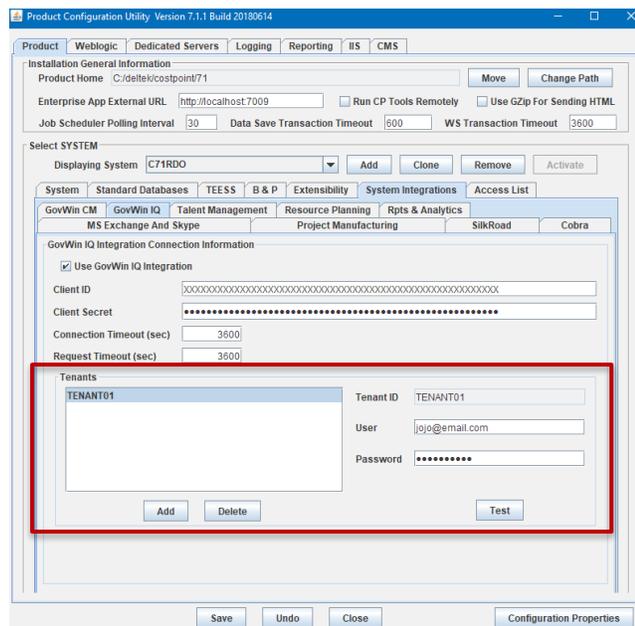
Opportunity Transfer

To import opportunities from GovWin IQ into Costpoint, you must follow a series of steps to configure the settings that will allow the integration between the two products.

Select Opportunities in GovWin IQ to Be Imported into Costpoint

In GovWin IQ, you must select opportunity records that you want to be imported into Costpoint.

If you delete an opportunity in Costpoint that has been imported from GovWin IQ and the **Add to Costpoint / Deltek CRM** is still selected for that opportunity in GovWin IQ, it will be reimported every time you run Import GovWin IQ Data in **Costpoint » Contracts**.

To select opportunity records:

1. In **GovWin IQ » Opportunity Details**, click the **Add to Costpoint / Deltek CRM** link to mark an opportunity record for transfer to Costpoint.

   If a record is marked for transfer to Costpoint, the link displays **Remove from Costpoint / Deltek CRM**.

> **Note:** For Costpoint 8.0 and higher versions, if you delete an Opportunity in Costpoint that was imported from GovWin IQ, you need to click **Remove from Costpoint / Deltek CRM** or a new opportunity record will be created on the next import. GovWin IQ Opportunities created prior to Costpoint 8.0 cannot be deleted from Costpoint. If the opportunity has already been imported to Costpoint and you click **Remove from Costpoint / Deltek CRM**, the opportunity will not be removed from Costpoint.

Set Up Costpoint to Import Opportunities

In Costpoint, you must configure the settings in the Contracts domain to prepare the system for importing opportunity records from GovWin IQ.

Configure Opportunity Settings

Use the Configure Opportunity Settings screen to set up the Tenant ID that contains the login information that you want to use for importing opportunities from GovWin IQ.

To set up the Tenant ID:

1. Click **Contracts » Contract Management Controls » Opportunities Controls » Configure Opportunity Settings**.

2. In the **GovWin IQ Login Alias (Tenant ID)** field, enter, or click 🔍 **Lookup** to select, the Tenant ID.

    The lookup displays a list of Tenant IDs that were added to the Product Configuration Utility.
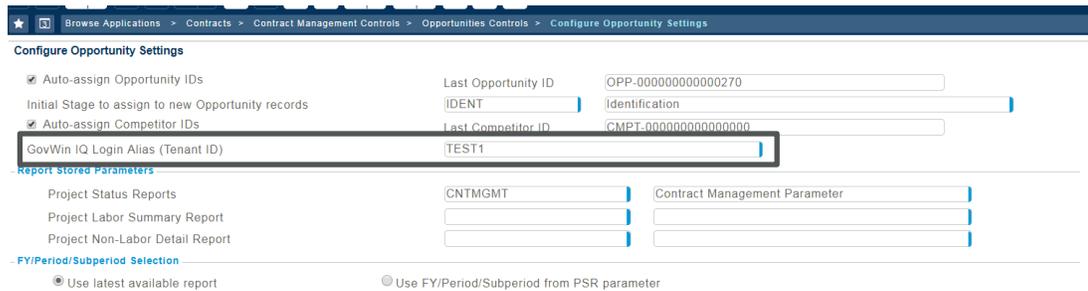
3. Click 💾 **Save**.

4. Click **Admin » System Administration » System Administration Utilities » Rebuild Global Settings**.

5. Select an option in the **Select Process** group box. Select **All Settings** to update all screens/functions at the same time or select **Individual Setting(s)** to update only specific screens/functions.

6. If you selected **Individual Setting(s)**, make sure to select **Opportunities/Contracts** in the **Individual Settings** group box.

7. Click ⚙️▼ and select **Reload Settings**.

Configure Contract Management Settings

Use the Configure Contract Management Settings screen to configure the GovWin IQ login account setting for GovWin IQ Integration.

To configure the GovWin IQ login account setting:

1. Click **Contracts » Contract Management Controls » Contract Management Controls » Configure Contract Management Settings**.

2. Click the Corporate Settings subtask.

3. Select the **Allow any GovWin IQ login Account to run Import GovWin IQ Data for all login Accounts/companies** check box if you want to allow any GovWin IQ login account to run the Import GovWin IQ Data process for all login accounts/companies.

4. Click **Save**.

5. Click **Admin » System Administration » System Administration Utilities » Rebuild Global Settings**.

6. Select an option in the **Select Process** group box. Select **All Settings** to update all screens/functions at the same time or select **Individual Setting(s)** to update only specific screens/functions.

7. If you selected **Individual Setting(s)**, make sure to select **Opportunities/Contracts** in the **Individual Settings** group box.

8. Click and select **Reload Settings**.

Import GovWin IQ Data

Use this screen to import opportunity records from GovWin IQ into Costpoint.

You can run the import process on-demand from this screen and you can also create stored parameters for running the import process at a scheduled time using the Costpoint Job Management applications.

To import GovWin IQ opportunities into Costpoint:

1. Click **Contracts » Opportunities » Opportunities Interfaces » Import GovWin IQ Data**.

2. Enter, or if you have previously created and saved parameters, click to select, a parameter ID. 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.

3. If you did not select a parameter ID, manually enter values in the fields.

4. In the **File Location** field, enter, or click 🔍 **Lookup** to select, the location where the process log file is saved after the import process completes. If you leave this field blank, Costpoint stores the data migration process logs in the database and you can view or download the process logs from the File Download screen.

> **Note:** For SaaS clients, to create alternate file locations, you need to submit a service request through the Support Center. (Set Up Alternate File Location).

5. Select an option in the **GovWin IQ Login Account Selection** group box. Select **Current Account** to import data for all companies with the same login account as the current logged-in company or select **All Accounts** to import GovWin IQ data for all login accounts/companies in the database.

6. In the **Opportunities to Update** group box, select the desired range option for opportunities you want to update:

    - **All**: Select this option to include all available records. The **Start** and **End** fields are disabled for this option.

    - **One**: Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled for this option.

    - **Range**: Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.

    - **From Beginning**: Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled for this option.

    - **To End**: Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled for this option.

7. Click 🔧 ▾ and select **Import GovWin IQ Opportunities** on the drop-down list to import opportunities immediately, or select **(Batch Mode) Import GovWin IQ Opportunities** to include the importing of opportunities during batch processing.

> **Note:** As the opportunities are imported, they will use the Last Opportunity ID numbering schema set up in the Configure Opportunity Settings screen for each company. If this has not been completed, an error message will be displayed indicating that auto generate needs to be set up and the ID needs to be populated.

8. If you did not select an existing Parameter ID and you want to reuse your configuration, enter a new value in the **Parameter ID** field and click 💾 **Save**.

Vendor Transfer

To import vendors from GovWin IQ into Costpoint, you must follow a series of steps to configure the settings that will allow the integration between the two products.

Select Vendors in GovWin IQ to Be Imported into Costpoint

In GovWin IQ, you must select vendor company profiles that you want to be imported into Costpoint.

Use the **Add to Costpoint / Deltek CRM** link to mark a record for transfer to Deltek Costpoint. To unmark a company, select **Remove from Deltek CRM**.

If **Add to Costpoint / Deltek CRM** is clicked for a vendor company profile and that vendor is deleted in Costpoint, it will be reimported every time you run Import GovWin IQ Vendor Data in **Costpoint » Accounting**.

To select vendor company profiles:

1. In GovWin IQ, click the **Add to Costpoint / Deltek CRM** link for a corresponding company profile to mark that record for transfer to Costpoint.

   When a record is marked for transfer to Costpoint, the link displays **Remove from Costpoint / Deltek CRM**.
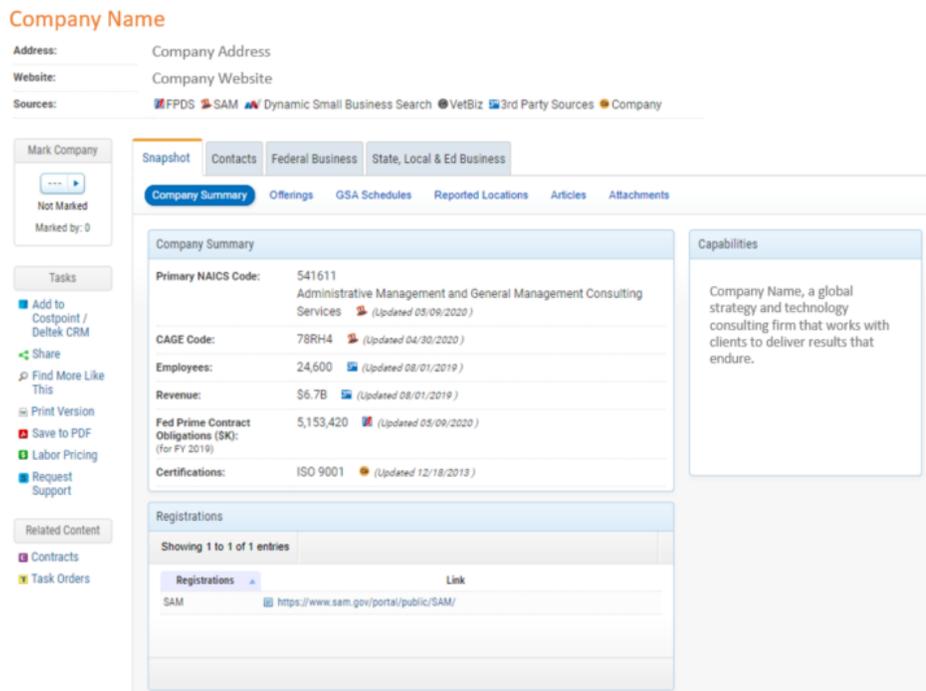
> **Note:** If a company (vendor) has already been transferred to Costpoint and **Remove from Deltek CRM** was selected, the company will not be removed from Costpoint. To unmark a vendor company profile, click **Remove from Costpoint / Deltek CRM**.

Set Up Costpoint to Import Vendors

Configure Vendor Settings

Use the Configure Vendor Settings screen to set up the Tenant ID that contains the login information that you want to use for importing vendors from GovWin IQ.

To set up the Tenant ID:

1. Click **Accounting » Accounts Payable » Vendor and Subcontractor Controls » Configure Vendor Settings**.

2. Select the **Allow any GovWin IQ Login Account to run Import GovWin IQ Vendor Data for all login Accounts/Companies** check box to allow any GovWin IQ login account to run the Import GovWin IQ Vendor Data process for all login accounts/companies.
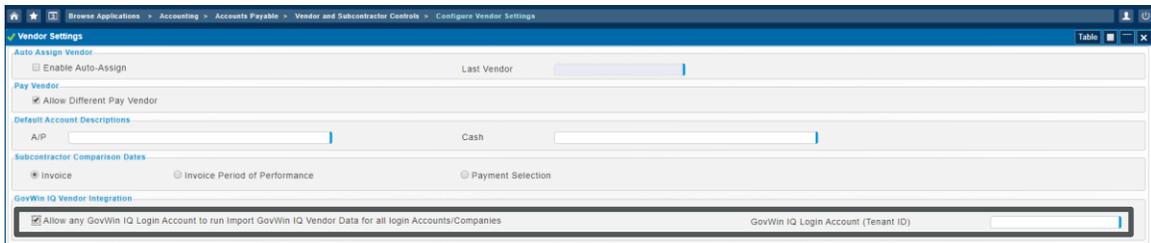
3. In the **GovWin IQ Login Account (Tenant ID)** field, enter, or click 🔍 **Lookup** to select, the Tenant ID.

4. Click 💾 **Save**.

5. Click **Admin » System Administration » System Administration Utilities » Rebuild Global Settings**.

6. Select an option in the **Select Process** group box. Select **All Settings** to update all screens/functions at the same time or select **Individual Setting(s)** to update only specific screens/functions.

7. If you selected **Individual Setting(s)**, make sure to select **Accounts Payable** in the **Individual Settings** group box.

8. Click 🔧 ▼ and select **Reload Settings**

Manage Vendors

Use the Manage Vendors screen to enter the GovWin IQ Company ID, which is the vendor's company ID in GovWin IQ. You can find this on the URL path when you open the Teaming tab of a company profile in GovWin IQ. You can modify this field for a vendor, but the ID must be a unique value within Costpoint.
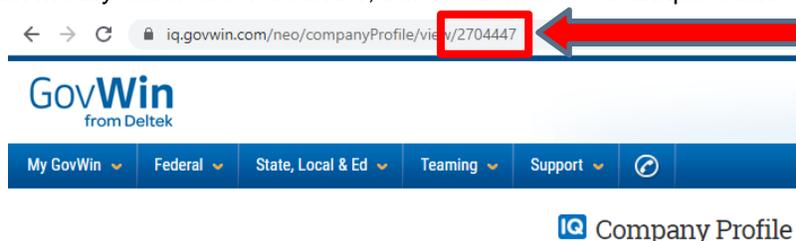
To set up the GovWin IQ Company ID:

1. Click **Accounting » Accounts Payable » Vendors » Manage Vendors**.

2. In the **GovWin IQ Company ID** field, enter the vendor's company ID in GovWin IQ.
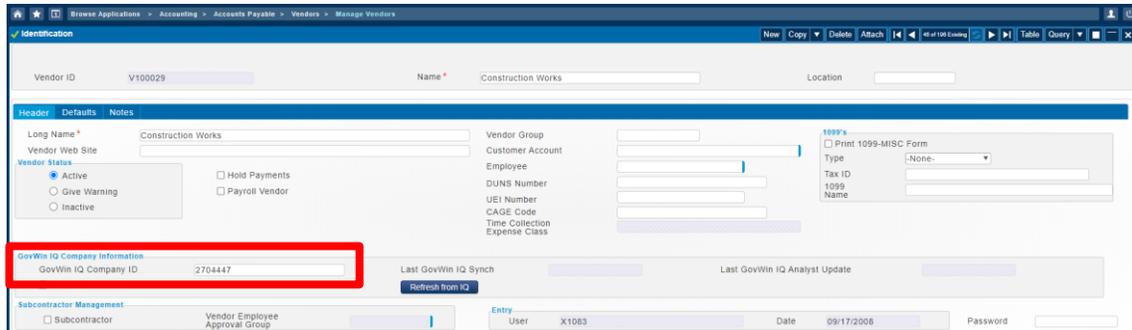
3. Click ![save icon] **Save**.

4. Click **Admin » System Administration » System Administration Utilities » Rebuild Global Settings**.

5. Select an option in the **Select Process** group box. Select **All Settings** to update all screens/functions at the same time or select **Individual Setting(s)** to update only specific screens/functions.

6. If you selected **Individual Setting(s)**, make sure to select **Accounts Payable** in the **Individual Settings** group box.

7. Click ![gear icon] and select **Reload Settings**.

Costpoint Import GovWin IQ Vendor Data

Use this screen to import vendor (company) records from GovWin IQ into Costpoint.

You can run the import process on-demand from this screen, and you can also create stored parameters for running the import process at a scheduled time using the Costpoint Job Management applications.

To import GovWin IQ vendor data into Costpoint:

1. Click **Accounting » Accounts Payable » Accounts Payable Interfaces » Import GovWin IQ Vendor Data**.

2. Enter, or if you have previously created and saved parameters, click Query ▼ to select, a parameter ID. 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.

3. If you did not select a parameter ID, manually enter values in the fields.

4. In the **File Location** field, enter, or click 🔍 **Lookup** to select, the location where the process log file is saved after the import process completes. If you leave this field blank, Costpoint stores the data migration process logs in the database and you can view or download the process logs from the File Download screen.

   > **Note:** For SaaS clients, to create alternate file locations, you need to submit a service request through the Support Center. (Set Up Alternate File Location).

5. Select an option in the **GovWin IQ Login Account Selection** group box. Select **Current Account** to import data for all companies with the same login account as the current logged-in company or select **All Accounts** to import GovWin IQ vendor data for all login accounts/companies in the database.

6. In the **Default Payment Terms** field, enter, or click 🔍 **Lookup** to select, the default payment term to be used in calculating discounts and due dates for new prospective vendors that will be created by the import process.

7. In the **Default Address Code** field, enter a code that will be used to identify the GovWin IQ company profile address for new prospective vendors that will be created by the import process.

> **Note:** Importing new vendors into Costpoint requires being licensed for Contract Management since new vendors are imported to Prospective Vendors. The Prospective Vendor ID will be assigned based on the auto-assign sequence stored in Configure Contract Management Settings. Prospective Vendors must be set up for Auto-Assign to use this feature.

8. Click ⚙️ ▼ and select **Import GovWin IQ Vendor Data** on the drop-down list to import opportunities immediately, or select **(Batch Mode) Import GovWin IQ Vendor Data** to include the importing of vendors during batch processing.

9. If you did not select an existing Parameter ID and you want to reuse your configuration, enter a new value in the **Parameter ID** field and click 💾 **Save**.

Special Topics

Use Web Services Account for the Tenant User

Deltek recommends that you use a web services account (webservices@clientdomain.com) for the Tenant User.

To use a web services account for the Tenant User:

1. Creates a web services account. This needs to be a valid/working client email account that can receive communications from GovWin IQ.

2. Contact the Deltek GovWin IQ Customer Success Management team and request for the web services email account to be set up in GovWin IQ.

3. Store the temporary password for the web services account that GovWin IQ will send to you via email.

4. Log into GovWin IQ using the web services email account and complete the account verification which includes changing the temporary password.

> **Note:** You must set the new password to "Deltek". Deltek will not be able to successfully set up the integration with the temporary password.

GovWin IQ User Passwords

Passwords in GovWin IQ must be changed every 90 days. These passwords must also be updated in Costpoint or you will not be able to proceed with the integration process.

You can change passwords of existing Costpoint users on the GovWin IQ Integration subtask of the Manage System Integration Accounts screen.

You can also request for the GovWin IQ Expiring Email Notification. This serves as an email notification to administrators when passwords are about to expire.

You must do the following for information to be set up in MPS by the GovWin IQ CSM:

- Request the service login account, webservices@clientdomain, be set up as the service account for the integration app. Make sure a permanent password for the login exists and provide them the credentials.

- Add the 'WSAPI Service Account' POC type to MPS and the 'WSAPI Administrator' POC Type to the users to receive email alerts. The POC type is updated on the contact detail edit form in MPS.

- In order for the client to be able to set up new passwords themselves for the service login, add the service login account as an alias on one of their user mailboxes in the company email system. This allows the user to receive the temporary password emails.

- Save the GovWin IQ Client ID and Secret for authentication.

- In GovWin IQ, click **Support » Integration Administration**.

Sample Email:

From: update@govwin.com [mailto:update@govwin.com]
Sent: Monday, July 02, 2018 4:00 AM
To: janedoe@CompanyName.com
Subject: One or more of your GovWin IQ Web Services passwords has expired or is about to expire

You are being sent this email because you have been designated as a GovWin Web Services administrator.

The password(s) for the following service accounts used by your application(s) that integrates with GovWin IQ (or OM), have expired:

Account   **Expiration Date**
webservices@CompanyName.com   06/10/2018

Reset and apply the new password(s) now, to continue using your integration application(s).

Contact your Deltek GovWin IQ Client Success Manager if you want them to reset the password for any of the accounts listed above.

Optionally, if any of the accounts listed above have been configured as a mailbox address in your email system, then you can change the password yourself by logging in to http://govwin.com and following the instructions:

- Either to "Send Temporary Password" on the login form, if the password for any of the accounts listed above have already expired.
- Or to, "Request Password Change", if you know the current password for any of the accounts and it has not expired yet, and you are able to login.

Once a new permanent password has been created, either by you, or your Deltek CSM, then you should use it in your integration application to generate a new authorization token, which must then be applied to the calls your application performs.

Please contact your Deltek GovWin IQ Client Success Manager if you run into any problems with this process, or have any questions or feedback.

If the password has expired and is not updated the Product Configuration Utility, the Costpoint integration will not succeed and an error message displays.

Tenant ID Planning

The Tenant ID is used in Costpoint to associate a specific GovWin IQ Login credential and may be used by one or more companies in Costpoint. You can have one Tenant ID per company in Costpoint, and the same Tenant ID can be used for multiple companies. Tenant IDs are mapped to GovWin IQ Services accounts and have a 1-to-1 relationship.

If you are using Use Groups in GovWin IQ, the Webservices Account must be assigned to the user group. This determines how the selected Opportunities in GovWin IQ will be mapped to Costpoint.

There are no limits on the number of User Groups that can be created or the number of Users assigned.

See the following examples:

Example 1: Costpoint is not using multi-company.

All opportunities selected by all GovWin IQ users in GovWin IQ will be transferred to Costpoint Company1.

IQ User Assigned To	User Group	Webservices Account	Tenant ID (Assigned To)	Costpoint Company
GWIQ_Users	None	Webservices1@clientdomain	TENANT_A	CPCompany1

Example 2: Costpoint has 2 companies that use a single GovWin IQ instance and users are mapped to specific companies. The Webservices account must be assigned to the user group.

GovWin IQ User Group 1 will transfer to Costpoint Company1, and GovWin IQ User Group 2 will transfer to Costpoint Company 2.

IQ User Assigned To	User Group	Webservices Account	Tenant ID (Assigned To)	Costpoint Company
GWIQ_User1	User Group1 (Webservices1)	Webservices1@clientdomain	TENANT_A	CPCompany1 (User Group1)
GWIQ_User2	User Group2 (Webservices2)	Webservices2@clientdomain	TENANT_B	CPComapny2 (User Group2)

Example 3: Costpoint has 2 companies that use a single GovWin IQ instance and the Webservices account is assigned to multiple user groups.

GovWin IQ User Group 1 will transfer to Costpoint Company1 and GovWin IQ User Group 2 will transfer to Costpoint Company 1 and 2 because Webservices1 is assigned to both user groups in GovWin IQ.

IQ User Assigned To	User Group	Webservices Account	Tenant ID (Assigned To)	Costpoint Company
GWIQ_User1	User Group1 (Webservices1)	Webservices1@clientdomain	TENANT_A	CPCompany1 (User Group1)
GWIQ_User1	User Group2 (Webservices1) (Webservices2)	Webservices2@clientdomain	TENANT_B	CPComapny2 (User Group1) (User Group2)
GWIQ_User2	User Group2 (Webservices1) (Webservices2)	Webservices2@clientdomain	TENANT_B	CPComapny2 (User Group1) (User Group2)

Example 4: Costpoint has 4 companies that use a single GovWin IQ instance.

GovWin IQ User Groups 1–3 will transfer to Costpoint Company1–3 because each user group has the same Webservices account. GovWin IQ User Group 4 will map to Costpoint Company4.

IQ User Assigned To	User Group	Webservices Account	Tenant ID (Assigned To)	Costpoint Company
GWIQ_User1	User Group1 (Webservices1)	Webservices1@clientdomain	TENANT_A	CPCompany1 (User Group1,2,3)
GWIQ_User1	User Group2 (Webservices1)	Webservices1@clientdomain	TENANT_A	CPComapny2 (User Group1,2,3)
GWIQ_User1	User Group3 (Webservices1)	Webservices1@clientdomain	TENANT_A	CPComapny3 (User Group1,2,3)
GWIQ_User2	User Group4 (Webservices2)	Webservices2@clientdomain	TENANT_B	CPComapny4 (User Group 4)

To create user groups in GovWin IQ, you must provide a list of GovWin IQ users, and the user group label to the GovWin IQ CSM team. The CSM team will work with Deltek GovWin IQ PDM to get the new user groups added to your GovWin IQ account.

You must also provide the GovWin IQ CSM team the Webservice account to assign the user group(s). To assign or de-assign users to existing user groups, you can work directly with GovWin IQ CSM.

Troubleshooting

1. **Issue (Product Configuration Utility)**: Test connection Failed.

   Resolution: Make sure the Product Configuration Utility is set up with the correct Client ID, Client Secret, user name and password.

   If this continues to be an issue, have the client regenerate the Client Secret.

2. **Issue (Costpoint Import GovWin IQ Data)**: Error: Failed to retrieve data from GovWin IQ server.

   Resolution: Connection to GovWin IQ is not working. Make sure the Product Configuration Utility is set up with the correct Client ID, Client Secret, user name, and password.

   If the connection tested successfully in the Product Configuration Utility, run the Rebuild Global Settings in Costpoint.

3. **Issue (Costpoint Import GovWin IQ Data)**: Error: The log file could not be created. Please make sure that the file location is accessible.

   Resolution: The File Location field does not have a valid name. Select the lookup and choose a valid location or leave blank, and the file will save to the database.

4. **Issue (Opportunity)**: The Costpoint Import GovWin IQ Data processed without errors and the import log file says 20 files imported; however only 5 new opportunities are in the Manage Opportunities screen.

   Resolution: Run the Costpoint View Interface Execution Status History to see if there were any validation errors on import. Also review the Server logs for errors.

   - On-Premises: Located under the Deltek\logs folder of the Costpoint Installation.

   - SaaS: Will need to submit a service request to obtain the logs.

   You must also ensure that the **Auto-assign Opportunity IDs** check box on the Configure Opportunities screen is marked and the **Last Opportunity ID** field has a value. This is required for imports from GovWin IQ.

   You must have access rights to Manage Opportunities for the records to be entered.

5. **Issue**: Processing time for GovWin IQ import takes a long time.

   > **Note:** The current API for GovWin makes several request for each opportunity. (Contacts, RelatedDocuments, GovEntity, fboNotices, Milestones, Companies, RelatedArticles, PlacesOfPerformance, ContractVehicles)

   Resolution: There is no resolution at this time.

6. **Issue (Opportunity)**: If you manually add the GovWin IQ Opportunity ID to a record on the GovWin IQ subtask of the Manage Opportunities screen, and click **Refresh from IQ** or use the GovWin IQ Import utility, you encounter an error message stating "Error(s): Either the application is unable to connect to GovWin IQ server or the GovWin IQ ID does not exist."

   Resolution: The Opportunity prefix broken out below needs to be added for the sync to GovWin IQ to work properly (for example, OPP147837).

   a) OPP = Opportunity

   b) BID = Bid

   c) TNS = Toons

       d)   FBO = Federal Business Opportunities (Added V8.0)

7. **Issue**: In GovWin IQ, when you try to mark a record to send to Costpoint, the link displays as **Add to Deltek CRM**, not **Add to Costpoint/Deltek CRM**.

   Resolution: You must have your GovWin IQ CSM have the Deltek CRM Integration changed to "This org is enabled for integration with Costpoint or Core CRM 7.5 and later (CM/Vision CRM) without iAccess." The **Deltek CRM URL** or **iAccess URL** field will need to be blank.

8. For SaaS clients, if Engineering needs access to the database to troubleshoot, the following must be done:

   - Customer Care needs to request integration setup with GovWin IQ in the Customer Care Costpoint Environment.

     - Access information needs to be sent to engineering once this is complete.

   - The Customer Care virtual servers (both DB and App Server) are not configured to allow open access to the internet for security reasons.

     - Customer Care needs to submit a request through the Cloud Automation Center Kona space using the Allowing Ports through firewall of VCAC VMS.

     > **Note:** Direct access to the client's data on cloud is not allowed, it needs to be in CC for engineering to troubleshoot.

9. **Issue (GovWin IQ)**: You are unable to see the **Integration Administration** option under Software Connectivity.

   Resolution: The org in MPS needs to be provisioned for the Costpoint integration. This needs to be completed by Deltek. Contact the Deltek CSM for assistance.

Deltek CRM Integration:

| This org is enabled for integration with Costpoint or core CRM 7.5 and later (CM / Vision CRM), without iAccess |

Frequently Asked Questions (FAQs)

The following are frequently asked questions regarding GovWin IQ and Costpoint integration.

On vendor integration: How often does GovWin IQ update information from SAM.gov, and can this be modified?

Every Saturday. No, this cannot be modified.

On vendor integration: Which screens will display the exclusion banner?

GovWin IQ: Teaming » Company Profile screen
Costpoint: Manage Vendors and Manage Contract Management Vendor screens.

On vendor integration: Will either programs attach documentation showing that the vendor was validated?

GovWin IQ: No

Costpoint: No

On vendor integration: Is there a way to prevent the banner warning if it's determined the exclusion is not validated?

GovWin IQ: No
Costpoint: No

On opportunity integration: On the GovWin IQ subtask in Manage Opportunities, what do the three characters before the GovWin IQ ID mean?

- **OPP**: Opportunity
- **BID**: Bid
- **TNS**: Toons
- **FBO**: Federal Business Opportunities (Added V8.0)

The prefix is automatically added when using the GovWin IQ Import utility from GovWin IQ to identify the type of opportunity.

Appendix A: GovWin IQ to Costpoint Integration Fields (Opportunity)

This provides the mapping of database tables and columns/fields between GovWin IQ and Costpoint when importing opportunity information from GovWin IQ.

The Import GovWin IQ Data screen in Costpoint uses this mapping when processing opportunity records from GovWin IQ. The integration can also be run for a particular opportunity record using the **Refresh from IQ** button on the GovWin IQ subtask of the Manage Opportunities screen.

The following occur when a record is updated via the GovWin IQ integration:

- Fields that are mapped from GovWin IQ will be overwritten.
- Fields that default from Costpoint will not be overwritten.

On the GovWin IQ subtask in Manage Opportunities, you can select the **Do Not Refresh** check box if you do not want the opportunity record to be updated by the GovWin IQ integration. This affects the whole record. Currently, there is no option to update certain records only.

Target Costpoint Table: OPP_MASTER

GovWin IQ Field (Source)	Source	Costpoint Table (Target)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
Costpoint: Based on numbering in Opportunity Settings	Costpoint	OPP_MASTER	OPP_ID	Opportunity ID	Yes	No
Costpoint: Set to GovWin IQ	Costpoint	OPP_MASTER	OPP_REC_TYPE	Record Type	Yes	No
GovWin IQ: Program Name (truncated if needed)	GovWin IQ	OPP_MASTER	OPP_NAME	Opportunity Name	Yes	Yes
GovWin IQ: RFP Number	GovWin IQ	OPP_MASTER	OPP_NUMBER	Opportunity Number	Yes	Yes
GovWin IQ: (Program) Summary	GovWin IQ	OPP_MASTER	OPP_DESC	Short Description	Yes	Yes
GovWin IQ: Agency If **Agency** does not exist in the Costpoint table, add the code and title to the Costpoint table (OPP_AGENCIES) and select the **Show in Lookup** check box.	GovWin IQ	OPP_MASTER	PRIME_AGEN_ID	Primary Agency	Yes	Yes

GovWin IQ Field (Source)	Source	Costpoint Table (Target)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
Costpoint: Populate with the **Initial Stage to assign to new Opportunity records** from Opportunity Settings (OPP_SETTINGS.OPP_INITIAL_STAGE). If that is blank, use the **Stage** with the lowest sequence number that has the **Show in Lookup** check box selected.	Costpoint	OPP_MASTER	OPP_STAGE_CD	Stage	Yes	No
Costpoint: Populate with the date the record is downloaded from GovWin IQ	Costpoint	OPP_MASTER	STAGE_CHANGE_DT	Date Changed	Yes	No
Costpoint: Set to GOVWINIQ	Costpoint	OPP_MASTER	OPP_SOURCE_CD	Source	Yes	No
Costpoint: Set to Active	Costpoint	OPP_MASTER	RECORD_STATUS_CD	Record Status	Yes	No
Costpoint: Populate with the date the record is downloaded	Costpoint	OPP_MASTER	OPP_OPENED_DT	Date Opened	Yes	No
GovWin IQ: NAICS	GovWin IQ	OPP_MASTER	NAICS_CD_1	NAICS (primary)	Yes	Yes
GovWin IQ: EstValue	GovWin IQ	OPP_MASTER	OPP_TOTAL_VALUE	Total Value	Yes	Yes
GovWin IQ: Program Name (no need to be truncated)	GovWin IQ	OPP_MASTER	OPP_LONG_NAME	Long Name	Yes	Yes
GovWin IQ: Program Description	GovWin IQ	OPP_MASTER	OPP_LONG_DESC	Full Description	Yes	Yes
NA: Blank - May be required. The system saves the record with them blank, and provides a warning message that records have been created without required discretionary fields.	NA	OPP_MASTER	Many	RFP Dates and Detail text fields	NA	NA

Target Costpoint Table: OPP_GOVWINIQ

GovWin IQ Field (Source)	Source	Costpoint Table (Target)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
Costpoint: Based on numbering in Opportunity Settings	Costpoint	OPP_GOVWINIQ	OPP_ID	Opportunity ID	Yes	No
Costpoint: Set to GovWin IQ	Costpoint	OPP_GOVWINIQ	(not stored)	Opportunity Record Type (Display only)	Yes	No
GovWin IQ: Program Name (truncated if needed)	GovWin IQ	OPP_GOVWINIQ	(not stored)	Opportunity Name (Display only)	Yes	Yes
NA	Costpoint	OPP_GOVWINIQ	REFRESH_FL	Do Not Refresh flag (check box)	NA	NA
Costpoint: Updated with date/time from the integration application when GovWin IQ integration is run and record is updated.	Costpoint	OPP_GOVWINIQ	LAST_GWIQ_SYNCH	Last GovWin IQ Synch	Yes	Yes
GovWin IQ: Updated	GovWin IQ	OPP_GOVWINIQ	LAST_ANALYST_UPD	Last GovWin IQ Analyst Update	Yes	Yes
GovWin IQ: Program Name (no need to be truncated)	GovWin IQ	OPP_GOVWINIQ	PROGRAM_NAME	Program Name	Yes	Yes
GovWin IQ: Opportunity ID	GovWin IQ	OPP_GOVWINIQ	GOVWIN_ID	GovWin IQ ID	Yes	Yes
GovWin IQ: Acronym ID	GovWin IQ	OPP_GOVWINIQ	ACRONYM	Acronym	Yes	Yes
GovWin IQ: Department ID	GovWin IQ	OPP_GOVWINIQ	DEPARTMENT	Department	Yes	Yes
GovWin IQ: Agency ID	GovWin IQ	OPP_GOVWINIQ	AGENCY_ID	Agency ID (not displayed)	Yes	Yes
GovWin IQ: Agency Title (Element)	GovWin IQ	OPP_GOVWINIQ	AGENCY_TITLE	Agency Title	Yes	Yes
GovWin IQ: Status	GovWin IQ	OPP_GOVWINIQ	CURR_STATUS_DESC	Current Status	Yes	Yes

GovWin IQ Field (Source)	Source	Costpoint Table (Target)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
GovWin IQ: RFP Number	GovWin IQ	OPP_GOVWINIQ	SOLICITATION_NO	Solicitation Number	Yes	Yes
GovWin IQ: EstValue	GovWin IQ	OPP_GOVWINIQ	EST_VALUE	Estimated Value	Yes	Yes
GovWin IQ: Competition Type	GovWin IQ	OPP_GOVWINIQ	COMPETITION_TYPE	Competition Type	Yes	Yes
GovWin IQ: NAICS (Primary NAICS Code)	GovWin IQ	OPP_GOVWINIQ	NAICS_CD_1	NAICS Code	Yes	Yes
GovWin IQ: Government Website	GovWin IQ	OPP_GOVWINIQ	GWIQ_OPP_LINK	IQ Opportunity Link	Yes	Yes
GovWin IQ: Duration	GovWin IQ	OPP_GOVWINIQ	DURATION	Duration	Yes	Yes
GovWin IQ: Contract Type	GovWin IQ	OPP_GOVWINIQ	CONTRACT_TYPE	IQ Contract Type	Yes	Yes
GovWin IQ: Primary Offering	GovWin IQ	OPP_GOVWINIQ	PRIMARY_OFFER	Primary Offering	Yes	Yes
GovWin IQ: Comments	GovWin IQ	OPP_GOVWINIQ	COMMENTS	Comments	Yes	Yes
GovWin IQ: Summary	GovWin IQ	OPP_GOVWINIQ	PROG_SUMMARY	Summary	Yes	Yes
GovWin IQ: Potential Participants	GovWin IQ	OPP_GOVWINIQ	POT_BIDDERS	Potential Bidders	Yes	Yes
GovWin IQ: Procurement Activity	GovWin IQ	OPP_GOVWINIQ	PROCUREMT_ACTIVITY	Procurement Activity	Yes	Yes
GovWin IQ: Program Description	GovWin IQ	OPP_GOVWINIQ	PROGRAM_DESCRIP	Program Description	Yes	Yes

Target Costpoint Table: OPP_GWIQ_KEY_DATES

GovWin IQ Field (Source)	Source	Costpoint Table (Target)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
Costpoint: Based on numbering in Opportunity Settings	Costpoint	OPP_GWIQ_KEY_DATES	OPP_ID	Opportunity ID	Yes	No
GovWin IQ: Milestone <label>	GovWin IQ	OPP_GWIQ_KEY_DATES	MILESTONE	Milestone	Yes	Yes

GovWin IQ Field (Source)	Source	Costpoint Table (Target)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
GovWin IQ: Milestone <date>	GovWin IQ	OPP_GWIQ_KEY _DATES	MILESTONE_ DATE	Date (IQ Estimate)	Yes	Yes
Costpoint field only	Costpoint	OPP_GWIQ_KEY _DATES	COMMENTS	Comments	No	No
Costpoint field only	Costpoint	OPP_GWIQ_KEY _DATES	RESP_PARTY	Responsible Party	No	No

Target Costpoint Table: OPP_GWIQ_CONTACTS

GovWin IQ Field (Source)	Source	Costpoint Table (Target)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
Costpoint: Based on numbering in Opportunity Settings	Costpoint	OPP_GWIQ_CON TACTS	OPP_ID	Opportunity ID	Yes	No
GovWin IQ: firstname	GovWin IQ	OPP_GWIQ_CON TACTS	FIRST_NAME	First Name	Yes	Yes
GovWin IQ: lastname	GovWin IQ	OPP_GWIQ_CON TACTS	LAST_NAME	Last Name	Yes	Yes
GovWin IQ: title	GovWin IQ	OPP_GWIQ_CON TACTS	TITLE	Title	Yes	Yes
GovWin IQ: phone	GovWin IQ	OPP_GWIQ_CON TACTS	PHONE_ID_1	Phone Number 1	Yes	Yes
GovWin IQ: email	GovWin IQ	OPP_GWIQ_CON TACTS	EMAIL_ID	E-mail	Yes	Yes
GovWin IQ: contactType	GovWin IQ	OPP_GWIQ_CON TACTS	CONTACT_TY PE	Contact Type	Yes	Yes
GovWin IQ: address1	GovWin IQ	OPP_GWIQ_CON TACTS	LN_1_ADR	Address Line 1	Yes	Yes
GovWin IQ: address2	GovWin IQ	OPP_GWIQ_CON TACTS	LN_2_ADR	Address Line 2	Yes	Yes
GovWin IQ: address3	GovWin IQ	OPP_GWIQ_CON TACTS	Ln_3_ADR	Address Line 3	Yes	Yes
GovWin IQ: city	GovWin IQ	OPP_GWIQ_CON TACTS	CITY_NAME	City	Yes	Yes
GovWin IQ: State	GovWin IQ	OPP_GWIQ_CON TACTS	MAIL_STATE	State	Yes	Yes

GovWin IQ Field (Source)	Source	Costpoint Table (Target)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
GovWin IQ: zip	GovWin IQ	OPP_GWIQ_CONTACTS	POSTAL_CD	Postal Code	Yes	Yes
GovWin IQ: country	GovWin IQ	OPP_GWIQ_CONTACTS	COUNTRY	Country	Yes	Yes

Target Costpoint Table: OPP_GWIQ_ADDED_BY

GovWin IQ Field (Source)	Source	Costpoint Table (Target)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
Costpoint: Based on numbering in Opportunity Settings	Costpoint	OPP_GWIQ_ADDED_BY	OPP_ID	Opportunity ID	Yes	No
GovWin IQ: GovWin IQ login ID (user's email address)	GovWin IQ	OPP_GWIQ_ADDED_BY	ADDED_BY_NAME	"Added By" Name	Yes	No
Costpoint: EMPL	Costpoint	OPP_GWIQ_ADDED_BY	EMPL_ID	Employee ID	Yes	No
GovWin IQ: GWIQ	Costpoint	OPP_GWIQ_ADDED_BY	SOURCE	Source	Yes	No

Appendix B: GovWin IQ to Costpoint Integration Fields (Vendor)

This provides the mapping of database tables and columns/fields between GovWin IQ and Costpoint when importing vendor information from GovWin IQ.

The Import GovWin IQ Vendor Data screen in Costpoint uses this mapping when processing vendor (regular and prospective) records from GovWin IQ. The integration can also be run for a particular regular vendor record using the **Refresh from IQ** button on the Manage Vendors screen, or for a specific prospective vendor using the **Refresh from IQ** button on the Manage Contract Management Vendor Info screen.

The following occur when a record is updated via the GovWin IQ integration:

- Fields that are mapped from GovWin IQ will be overwritten.
- Fields that default from Costpoint will not be overwritten.

On the Manage Vendors and Manage Contract Management Vendor Info screens, you can select the **Do Not Refresh** check box if you do not want the regular or prospective vendor record to be updated by the GovWin IQ integration. This affects the whole record. Currently, there is no option to update certain records only.

The integration follows these guidelines when adding, updating, or removing vendor exclusion data:

- If the exclusion record no longer exists in GovWin IQ, there should be no exclusion record in Costpoint. If existing in Costpoint, the record will be deleted.
- If there is an exclusion record in both GovWin IQ and Costpoint, the integration updates/overwrites all available values in Costpoint.
- If the exclusion record exists only in GovWin IQ, the integration inserts a new record in Costpoint.

GovWin IQ Field (Source)	Source	Costpoint Table (Target - Vendor)	Costpoint Table (Target - Prospective Vendor)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
GovWin IQ: GovWin ID (id); Must be populated manually in VEND.	GovWin IQ	VEND VEND_EXCLS	CT_VEND CT_VEND_EXCLS	GOVWIN_COMP_ID	GovWin IQ Company ID	No	No
Costpoint: Must be populated manually in VEND.	Costpoint	VEND VEND_EXCLS VEND_NAICS	CT_VEND CT_VEND_EXCLS	VEND_ID	Vendor ID	No	No
NA	Costpoint	NA	NA	REFRESH_FL	Do Not Refresh flag (check box)	NA	NA
Costpoint: System date at time of interface	Costpoint	VEND	CT_VEND	LAST_GWIQ_SYNCH	Last GovWin IQ Synch	Yes	Yes

GovWin IQ Field (Source)	Source	Costpoint Table (Target - Vendor)	Costpoint Table (Target - Prospective Vendor)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
GovWin IQ: Update Date (updateDate)	GovWin IQ	VEND	CT_VEND	LAST_GWIQ _ANALYST_ UPD	Last GovWin IQ Analyst Update	Yes	Yes
GovWin IQ: Company URL (companyURL) Only updates if value is blank or null.	GovWin IQ	VEND	CT_VEND	VEND_WEB _SITE	Website	Yes	No
GovWin IQ: Cage Code (cageCodeObj) Only updates if value is blank or null. If more than one value, only populates the first.	GovWin IQ	VEND	CT_VEND	CAGE_CD	Cage Code	Yes	No
Small Business (in one or more NAICS)*	GovWin IQ	VEND	CT_VEND	S_CL_SM_B US_CD='S'	Default Size - Small	Yes	No
Women Owned*	GovWin IQ	VEND	CT_VEND	CL_WOM_O WN_FL	Woman- Owned	Yes	No
Small Disadvantaged Business (Self Certified)*	GovWin IQ	VEND	CT_VEND	CL_DISADV_ FL and S_CL_SM_B US_CD='S'	Disadvanta ged (Include Minority- Owned), Default Size - Small	Yes	No
Economically Disadvantaged Women Owned Small Business*	GovWin IQ	VEND	CT_VEND	CL_DISADV_ FL CL_WOM_O WN_FL S_CL_SM_B US_CD='S'	Disadvanta ged (Include Minority- Owned), Woman- owned, Default Size - Small	Yes	No
Veteran Owned*	GovWin IQ	VEND	CT_VEND	CL_VET_FL	Veteran- Owned	Yes	No
Service Disabled Veteran Owned*	GovWin IQ	VEND	CT_VEND	CL_SD_VET _FL	Service- Disabled Veteran- Owned	Yes	No

GovWin IQ Field (Source)	Source	Costpoint Table (Target - Vendor)	Costpoint Table (Target - Prospective Vendor)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
Alaskan Native Corporation Owned or Tribally Owned*	GovWin IQ	VEND	CT_VEND	CL_ANC_IT_FL	Alaskan Native Corporations (ANC) and Indian Tribes	Yes	No
HUBZone Program*	GovWin IQ	VEND	CT_VEND	CL_LAB_SRPL_FL	HUBZone	Yes	No
Historically Black College or University*	GovWin IQ	VEND	CT_VEND	CL_HIST_BL_CLG_FL	Historical Black Colleges and Universities/Minority Institutions	Yes	No
8(a) Certified*	GovWin IQ	VEND	CT_VEND	CL_8A_FL	8(a) Certified	Yes	No
Native Hawaiian Organization Owned*	GovWin IQ	VEND	CT_VEND	CL_DISADV_FL S_CL_SM_BUS_CD='S'	Disadvantaged (Include Minority-Owned), Default Size - Small	Yes	No
SDB Black American Owned*	GovWin IQ	VEND	CT_VEND	CL_DISADV_FL S_CL_SM_BUS_CD='S'	Disadvantaged (Include Minority-Owned), Default Size - Small	Yes	No
SDB Hispanic American Owned*	GovWin IQ	VEND	CT_VEND	CL_DISADV_FL S_CL_SM_BUS_CD='S'	Disadvantaged (Include Minority-Owned), Default Size - Small	Yes	No
Native American Owned*	GovWin IQ	VEND	CT_VEND	CL_ANC_IT_FL	Alaskan Native Corporations (ANC) and Indian Tribes	Yes	No

GovWin IQ Field (Source)	Source	Costpoint Table (Target - Vendor)	Costpoint Table (Target - Prospective Vendor)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
SDB Asian-Pacific American Owned*	GovWin IQ	VEND	CT_VEND	CL_DISADV_FL S_CL_SM_BUS_CD='S'	Disadvantaged (Include Minority-Owned), Default Size - Small	Yes	No
SDB Subcontinent Asian Owned*	GovWin IQ	VEND	CT_VEND	CL_DISADV_FL S_CL_SM_BUS_CD='S'	Disadvantaged (Include Minority-Owned), Default Size - Small	Yes	No
Costpoint: Populates with next number from settings	Costpoint	NA	CT_VEND	VEND_PROSPECT_ID	Prospective Vendor ID	Yes	No
Company Name (companyProfile Name)	GovWin IQ	NA	CT_VEND	VEND_NAME	Name	Yes	Yes
Company Name (companyProfile Name)	GovWin IQ	NA	CT_VEND	VEND_LONG_NAME	Long Name	Yes	Yes
Costpoint: Populates from IQ interface parameters	Costpoint	NA	CT_VEND	TERMS_DC	Terms	Yes	No
Costpoint: Defaults to Pending	Costpoint	NA	CT_VEND	VEND_APPRVL_CD	Vendor Approval Status	Yes	No
Exclusion Type (exclusionTypeTx)	GovWin IQ	VEND_EXCLS	CT_VEND_EXCLS	EXCLS_TYPE Code: Display: IPP Ineligible (Proceedings Pending) IPC Ineligible (Proceedings Completed) RES Prohibition/Restriction VOL Voluntary Exclusion	Exclusion type	Yes	Yes
Active Date (activeDateTx)	GovWin IQ	VEND_EXCLS	CT_VEND_EXCLS	EXCLS_ACTIVE_DT	Exclusion active date	Yes	Yes

GovWin IQ Field (Source)	Source	Costpoint Table (Target - Vendor)	Costpoint Table (Target - Prospective Vendor)	Costpoint Column (Target)	Costpoint Field Name (Target)	Inserts New	Refresh Changes
Termination Date (terminationDateTx)	GovWin IQ	VEND_EXCLS	CT_VEND_EXCLS	EXCLS_TERM_DT	Exclusion term date	Yes	Yes
Primary NAICS (primaryNAICSTx)	GovWin IQ	VEND_NAICS	NA	OPP_NAICS_CD , set PRIME_NAIC ='Y'	Primary NAICS	Yes	Yes
NAICS (naicsTxObj)	GovWin IQ	VEND_NAICS	NA	OPP_NAICS_CD , set PRIME_NAIC ='N' or NULL	Multiple NAICS values	Yes	Yes
Costpoint: Populates from CT_VEND table	Costpoint	NA	CT_VEND_ADDR	VEND_PROSPECT_ID	hidden	Yes	No
Costpoint: Default to IQ	Costpoint	NA	CT_VEND_ADDR	ADDR_DC	Address Code	Yes	No
GovWin IQ: Address (First Line) (address1)	GovWin IQ	NA	CT_VEND_ADDR	LN_1_ADR	Address Line 1	Yes	Yes
GovWin IQ: Address (Second Line) (address2)	GovWin IQ	NA	CT_VEND_ADDR	LN_2_ADR	Address Line 2	Yes	Yes
GovWin IQ: Address (Third Line) (address3)	GovWin IQ	NA	CT_VEND_ADDR	LN_3_ADR	Address Line 3	Yes	Yes
GovWin IQ: City (cityTx)	GovWin IQ	NA	CT_VEND_ADDR	CITY_NAME	City	Yes	Yes
GovWin IQ: State (stateTx)	GovWin IQ	NA	CT_VEND_ADDR	MAIL_STATE_DC	State/Province	Yes	Yes
GovWin IQ: Country (countryTx)	GovWin IQ	NA	CT_VEND_ADDR	COUNTRY_CD	Country	Yes	Yes
GovWin IQ: Zip Code (zip)	GovWin IQ	NA	CT_VEND_ADDR	POSTAL_CD	Postal Code	Yes	Yes

Note: Those marked with an asterisk (*) are from GovWin IQ: Socioeconomic Status (OrganizationSocioeconomicIndicatorsNameTx).

Appendix C: GovWin IQ Terminology and Contacts

For more information on GovWin IQ, refer to the terminology listed below, or contact the GovWin IQ Product Managers or Customer Success Managers.

Terminology

The following are common terms in GovWin IQ:

- **MPS**: This is the GovWin IQ provisioning system.
- **Distribution**: Deltek provides new IQ subscriptions (Sheila Boudreau's team)

Contacts

For GovWin IQ support, contact the following:

- **Product Managers**: Deepak Bhat, Ben Kairys, Barak Schriger, and Grant Laing (Kevin Plexico's product team).
- **Customer Success Managers**: Fiona Wass and team, Kim Williams and team (under Brian Haney).

Appendix D: If You Need Assistance

If you need assistance installing, implementing, or using Costpoint, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

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 https://deltek.custhelp.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.

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com

Deltek