Deltek

Deltek Costpoint® 7.1.1 GovWin Capture Management Data Migration

User's Guide

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Overview

This manual provides a reference for administrators and users who will set up and run the Migrate GovWin Capture Management Data process in Costpoint.

The Costpoint feature allows you to initially load your data into Costpoint if you are transferring systems from GovWin Capture Management to Costpoint Contract Management. This enhancement is designed to be used only during this transition phase.

The Migrate GovWin Capture Management Data (AOPCPDAT) screen in Costpoint allows you to import the following types of data from GovWin Capture Management.

- Vendor
- Customer (Client)
- Opportunity
- Contract (Project)

Use this guide together with the Migrate GovWin Capture Management Data online help.

> **Note:** Deltek's Technical Services team is available to support you as you plan for this data migration. We offer both technical and custom services, ensuring the best possible Deltek experience. Contact DGSCONSULTANTS-PES@Deltek.com.

Adding Custom Notes to This Guide

If you would like to add custom notes to this guide that are specific to your company, Adobe® Reader® X provides this ability. If you do not already use Adobe Reader X, you can download it here free from Adobe.

To add a custom note using Adobe Reader X, complete the following steps:

1. On the Reader toolbar, click **Comment** at the far right.
2. In the **Annotations** pane that displays, click **Sticky Note**. The cursor changes to match the button.
3. Position the cursor at the location in the guide where you want the note to appear, and click. A note icon is inserted at the location and a text box pops up.
4. Enter your information in the text box.
5. Continue adding notes as needed.
6. Save the document.

> **Note:** Deltek recommends that you save the document to a slightly different filename so as to keep the original from being overwritten.

When reading the document, cursor over a note icon to see the information. Double-click a note icon to edit the information.

Downloading Deltek Products using Deltek Software Manager

You can use Deltek Software Manager (DSM) to download complete Deltek products, hot fixes, cumulative updates, and sub-releases. You can access DSM through the Deltek Support Center or use Deltek Software Manager Lite to download Deltek products.

Accessing DSM from within the Deltek Support Center

To access DSM from within the Deltek Support Center:

1. In your Web browser, go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Login.**
3. When the Deltek Support Center page displays, click **Product Downloads**.
4. On the Deltek Software Manager screen, click **Launch Deltek Software Manager**.
5. Click **Settings** at the top right of the dialog box to use the Settings dialog box to specify the folder where you want to download Deltek products, and click **OK**.

   > **Note:** When you log on for the first time, DSM asks you to select a default folder where Deltek products are to be downloaded.
   >
   > You can change this folder anytime in the Settings dialog box.

6. In the left pane, expand the Deltek product that you want to download, if it is not already expanded.
7. Select the product type that you want to download.

   Options include:

   - **Complete**
   - **Cumulative Updates**
   - **HotFixes**
   - **Sub-Release**

8. In the table, select the check box that corresponds to the Deltek product that you want to download.

   The right pane displays a message stating that the product has been added to the download queue.

   > **Note:** To view the items in the download queue, click **View Download Queue** at the bottom of the left pane.

9. Click **Download** at the bottom of the left pane to download the product to the folder that you selected.

Accessing DSM Lite

To access Deltek Software Manager Lite:

1. In your Web browser, go to https://dsm.deltek.com/DeltekSoftwareManagerLite.
2. Enter your Deltek Support Center **Username** and **Password**, and click **Logon.**
3. When the Deltek Software Manager Lite page displays, select a product from the drop-down list.
4. Click the product type that you want to download.

> **Note:** The download behavior and download folder may differ depending on the browser and browser settings that you are using.

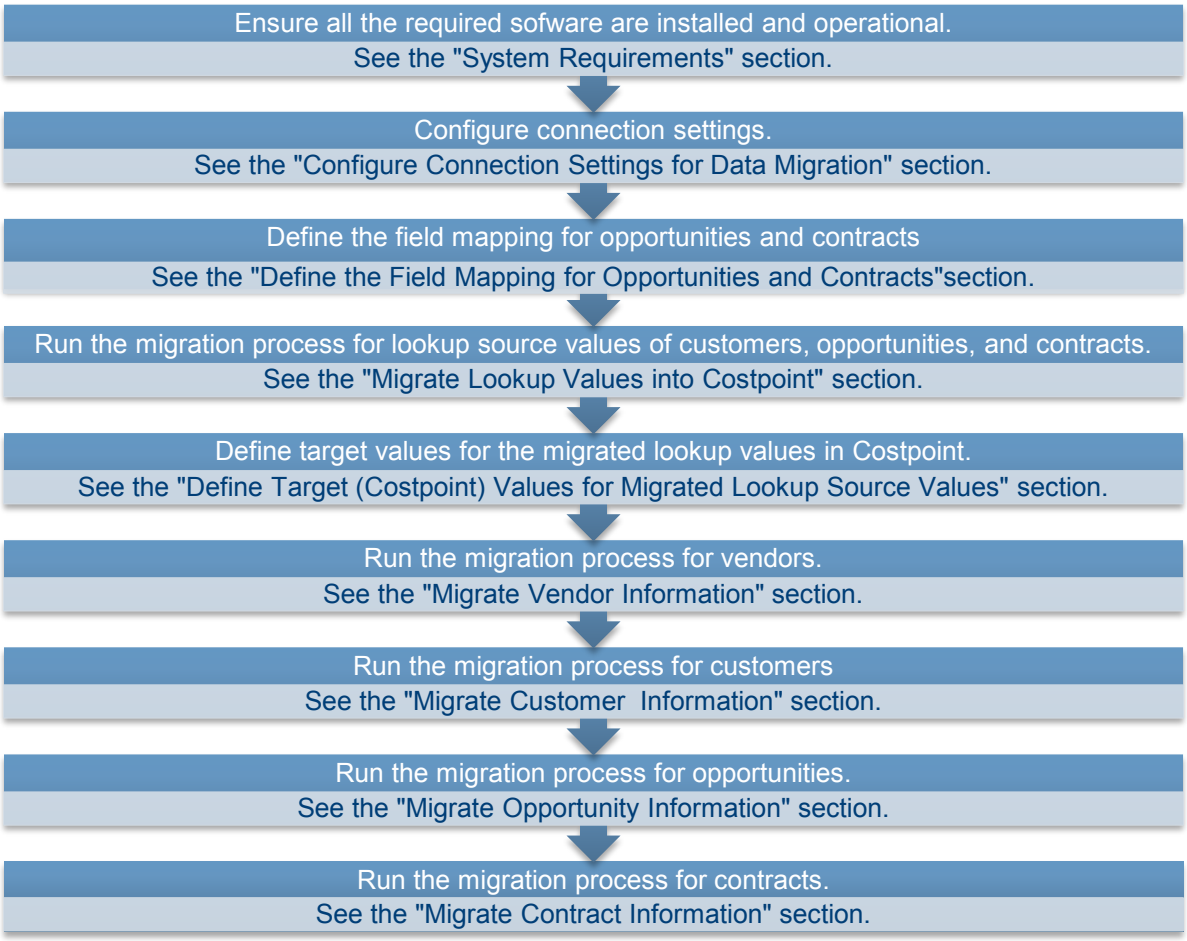
DSM Documentation and Troubleshooting

- To view the online help for Deltek Software Manager, click here.
- To view a tutorial on how to use Deltek Software Manager, click here.
- To view more information on troubleshooting Deltek Software Manager, click here.

> **Note:** When you click a link, you will be asked to log into DSM if you aren't already logged in.

Migration Setup Overview

This section provides a step-by-step overview of the entire process to successfully set up and run the migration process from GovWin Capture Management to Costpoint.



System Requirements

Ensure that the following are installed and operational:

- GovWin Capture Management Version 7.6 with latest Cumulative Update (or later)
- Costpoint Version 7.1.1 with System JAR 048 (or later)
- Latest release of the following Costpoint 7.1.1 applications:
  - Configure Contract Management Settings (CTMSETNG)
  - Configure Opportunity Settings (CTMOPSET)
  - Integration Field Mapping (AOMCPMAP)
  - Manage Contracts (CTMCNTR)
  - Manage Contract Management Customer Info (CTMCUST)
  - Manage Contract Management Vendor Info (CTMVEND)
  - Manage Element Value Mappings (AOMAIEVM)
  - Migrate GovWin Capture Management Data (AOPCPDAT)
  - Manage Opportunities (CTMOPP)
  - View Interface Execution Status History (LDQPMESH)

Configure Connection Settings for Data Migration

You must enter the correct connection settings in the Costpoint 7.1.1 Configuration Utility to allow migration process from GovWin Capture Management to Costpoint.

The data migration from GovWin Capture Management to Costpoint uses the same configuration settings as the Costpoint to GovWin Capture Management Integration. If you are a current user of the Costpoint to GovWin Capture Management Integration, your existing settings should work for the data migration.

Warning: SAAS/Cloud users who do not currently use the Costpoint to GovWin Capture Management Integration must submit a service request to Cloud operations to setup the Costpoint Configuration Utility and use the Data Transfer Tool to transmit passwords.

To configure the Costpoint to GovWin Capture Management Integration connection settings, complete the following steps:

1. On your Costpoint application server, click **Start » All Programs** » **Costpoint 7.1.1** » **Start Costpoint 7.1.1 Config Utility**.

   Note: Due to enhanced security in Windows Server 2008, Deltek recommends that you use the **Run as Administrator** option when launching this command even when the logged in user has local administrative rights.

2. On the Select Your Configuration Options screen, make sure that the **Costpoint Application Configuration** check box is selected and click **Next**. The check box is selected by default.
3. Click **System Integrations** tab » **GovWin CM** tab, and then enter the following connection settings:
   - **Use GovWin CM Integration** — Select this check box to enable integration with GovWin Capture Management.
   - **GovWin CM Web Service URL** — Enter the URL for the GovWin Capture Management Web Service.

     For example, enter **http://SERVERNAME/vision/visionws.asmx**, where SERVERNAME is the name of your GovWin Capture Management application server.
   - **User** — Enter **DELTEKCPINTEGRATION**.

     Warning: You must enter the DELTEKCPINTEGRATION user ID in this field in order for the connection and integration to work properly. For the purposes of this integration, you must create a DELTEKCPINTEGRATION user account with FULL rights in GovWin Capture Management.
   - **Password** and **Confirm Password** — Enter and confirm the password of the DELTEKCPINTEGRATION user account.
   - **Database Name** — Enter the GovWin Capture Management database name.
   - **Number of Rows Per Call** — Default value is **100**. This indicates how many records are transformed before Costpoint sends them to GovWin Capture Management.

- **Connection Timeout** — Default value is **10** seconds. This indicates the amount of time Costpoint will wait for GovWin Capture Management to respond during a connection.
- **Request Timeout** — Default value is **10** seconds. This indicates the amount of time Costpoint will wait for GovWin Capture Management to respond when transferring data.

4. Click **Test** to check if the settings are correct.
5. When the **Connected** message displays, click **OK**.
6. Click **Save**, and then click **OK** on the screen to confirm that all changes were saved.
7. Click **Close**.
8. Restart all WebLogic servers or run the Rebuild Global Settings screen in Costpoint Administration to allow the changes to take effect.

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

GovWin Capture Management and Costpoint Field Mapping

The GovWin Capture Management to Costpoint data migration transfers four major groups of information, namely,

- Vendor
- Customer (Client)
- Opportunities
- Contracts

The migration process uses standard and custom field mapping which identifies the source field and target field of each data that is being transferred. You must ensure that fields are properly mapped from the source system (GovWin Capture Management) to the target system (Costpoint).

Vendor and Customer information uses standard mapping which cannot be changed. However, the migration allows you to customize the mapping of certain fields for opportunity and contract information.

Attention: To view the default field mapping used by data migration process, refer to the *Deltek Costpoint® 7.1.1 GovWin Capture Management Data Migration Database Mapping Guide*.

Define the Field Mapping for Opportunities and Contracts

You must define and create the field mapping that the Migrate GovWin Capture Management Data screen will use when transferring opportunities and contracts to Costpoint.

Warning: You need to perform this task before you can migrate opportunities and contracts from GovWin Capture Management to Costpoint.

To create/define the field mapping for opportunities and contracts, complete the following steps:

1. Click **Admin** » **System Administration** » **System Administration Interfaces** » **Integration Field Mapping**.
2. Enter a unique mapping ID value in the **Map ID** field.
3. Enter or select the appropriate application in the **Application ID** field. Valid values are:
   - CTMCNTR (Manage Contracts)
   - CTMOPP(Manage Opportunities)
4. Click **Load Defaults**. The default mapping for opportunities/contracts displays on the Integration Field Mapping Details table.
5. Ensure that the **Target Column Name** (in Costpoint) is mapped to the correct **Source Column** (in GovWin Capture Management). Edit the values if necessary.
6. Take note of the mapping ID. You will use this ID when you migrate lookup source values and records of opportunities/contracts using the Migrate GovWin Capture Management Data screen.

Migrate Lookup Values into Costpoint

Before you can migrate customer, opportunity, and contract information, you must import applicable GovWin Capture Management lookup source values to Costpoint using the Migrate GovWin Capture Management Data screen.

Warning: You need to perform this task before migrating customers, opportunities, and/or contracts. If you are migrating opportunities or contracts, you need an existing customer/opportunity mapping ID created from the Integration Field Mapping screen.

To migrate lookup values from GovWin Capture Management to Costpoint:

1. Click **Admin** » **System Administration** » **System Administration Interfaces** » **Migrate GovWin Capture Management Data** screen.
2. Enter an ID for the migration settings in the **Parameter ID** field.
3. On the Lookup tab, select the applicable check boxes for the customers/opportunities/contracts lookup information.
   - **For migration of opportunity lookup source values:** enter the opportunity mapping ID in the **Opportunity Map ID** field.
   - **For migration of contract lookup source values:** enter the contract mapping ID in the **Contract Map ID** field.
4. Save your settings, and then run the Migrate GovWin Capture Management Data process. You can either run the process directly from the screen; or schedule the transfer using Costpoint Job Management applications.

Attention: After you migrate lookup values for the first time, you need to go to the Manage Element Value Mappings screen and define the target values in Costpoint. For more information, refer to the Define the Target (Costpoint) Values for the Migrated Lookup Values section

Define Target (Costpoint) Values for the Migrated Lookup Source Values

When you first migrate lookup values from GovWin Capture Management to Costpoint, the process assigns a corresponding target (Costpoint) value of “X” for each transferred source (GovWin Capture Management) value. You will need to change all the “X” target values with the proper value for Costpoint.

Each time you migrate lookup values from GovWin Capture Management, you need to define the Target value in Costpoint. You can view and edit the migrated source values from Manage Element Value Mappings screen.

To define the target values:

1. Click **Admin** » **System Administration** » **System Administration Interfaces** » **Manage Element Value Mappings** screen.
2. Enter the following:
   - **Interface ID:** Enter or select **VSWS_CP7X** (GovWin Capture Management Data Migration).
   - **Element ID:** Enter the element ID for the customer/opportunity/contract lookup.
3. Click **Autoload**.
4. On Element Value Mapping table, change all "X” values in the **Target Value** column to the proper value for Costpoint.
5. Click **Save**.

Migrate Vendor Information

Use Vendor tab on the Migrate GovWin Capture Management Data screen to include vendor information from GovWin Capture Management in the data transfer to Costpoint.

You can access vendor information transferred from GovWin Capture Management on the Manage Contract Management Vendor Info (CTMVEND) screen. The migrated information takes information from the following GovWin Capture Management tables:

- Vendor (VE)
- Vendor Address (VEAddress)
- Vendor Contacts (Contacts)

To migrate vendor information:

1. Click **Admin** » **System Administration** » **System Administration Interfaces** » **Migrate GovWin Capture Management Data**.
2. Enter an ID for the migration settings in the **Parameter ID** field.
3. Enter or select location for logs in the **File Location** field.

   > **Attention:** Entering a log file location is optional. It is not recommended for Cloud/SAAS users. For more information refer to the Integration Process Logs section.

4. Click the Vendor tab, and then select the **Migrate CM Vendor Data** check box.
5. Enter or select a vendor record in the **Default Vendor Record** field.

   > **Note:** The migration requires a vendor record from the Manage Contract Management Vendor Info screen which contains default values. When transferring Capture Management records to Costpoint, the application will use the values from this default vendor record on fields that have no values (NULL) but are required in Costpoint.

6. Use the following settings as necessary:
   - **Use auto-assign for Vendor Prospect IDs:** Select this check box to allow the application to automatically assign vendor prospect IDs to the records from GovWin Capture Management. The application will use the value in the **Last Vendor Prospect ID** field on the Corporate Settings subtask of the Configure Contract Management Settings screen as the basis for assigning new IDs to the vendor records from GovWin Capture Management.

     > **Note:** The **Use auto-assign for Vendor Prospect IDs** check box will be disabled if the **Auto-Assign Vendor Prospect IDs** check box is not selected on the Corporate Settings subtask of the Configure Contract Management Settings screen.

   - **Track CM 'Vendor' using UDEF:** Enter or select the user-defined field label where the application will store the prospective vendor ID.

> **Tip:** This option is useful if the **Use auto-assign for Vendor Prospect IDs** check box is selected. When you select the auto-assign ID function, you can specify a user-defined label where the application will store the original vendor ID. If you have this setup, you will be able to see the original vendor ID from GovWin Capture Management in the User Defined Info subtask of the Manage Contract Management Vendor Info (CTMVEND) screen.

- **Log Vendor migration transactions:** Select this check box to create a detailed log file which contains the logs the transactions and values of every source and target column.

  > **Warning:** Using this functionality may slow down the data transfer process.

- **Use Vendor Filter:** Select this check box to limit the records from GovWin Capture Management to specific vendors. To filter records, use the adjacent text box to enter statements that define specific criteria for the records that come from GovWin Capture Management. The text box is limited to 255 characters.

  For example, using the following statement/syntax limits the data transfer to vendor records with an **A** (Active) value in the **Status** column:

  ```
  Status = 'A'
  ```

  If you enter an invalid field name or value as a criteria, the migration will not transfer any records. The log file will indicate that zero records were transferred. If this issue occurs, you need to double-check the validity of the statement/syntax that you used as a filter.

7. Save your settings and then run the Migrate GovWin Capture Management Data process. You can either run the process directly from the screen or schedule the transfer using Costpoint Job Management applications.

   > **Tip:** If you have a large amount of data to migrate, Deltek recommends that you use the Job Management applications in the Costpoint Admin domain to schedule the data transfer.

Migrate Customer Information

Use this tab on the Migrate GovWin Capture Management Data screen to include customer/client information from GovWin Capture Management in the data transfer to Costpoint.

You can access customer information transferred from GovWin Capture Management on the Manage Contract Management Customer Info (CTMCUST) screen. The migration process takes information from the following GovWin Capture Management tables:

- Client (CL)
- Client Address (CLAddress)
- Client Contacts (Contacts)

Warning: Before transferring Customers from GovWin Capture Management, you must have completed the following prerequisites:

1. Migrate the Client Type (Transfer Client Type Source Values for Mapping) lookup values from GovWin Capture Management into Costpoint. For more information, refer to the Migrate Lookup Values into Costpoint section.
2. Define the target (Costpoint) values for the migrated client lookup values on the Manage Element Value Mappings screen. For more information, refer to the Define the Target (Costpoint) Values for the Migrated Lookup Values section.

To migrate customer information:

1. Click **Admin** » **System Administration** » **System Administration Interfaces** » **Migrate GovWin Capture Management Data**.
2. Enter an ID for the migration settings in the **Parameter ID** field.
3. Enter or select location for logs in the **File Location** field. This step is optional, for more information refer to the Integration Process Logs section.
4. Click the Customer tab, and then select the **Migrate CM Customer Data** check box.
5. Enter or select a customer record in the **Default Customer Record** field.

   Note: The migration requires a customer record from the Manage Contract Management Customer info screen which contains default customer type value. When transferring GovWin Capture Management records to Costpoint, the application will use the type from this default customer record on **Type** fields that have no values (NULL). Customer Type is required in Costpoint.

   This record is maintained in the Manage Contract Management Customer Info screen.

6. Use the following settings as necessary:
   - **Use auto-assign for Customer Prospect IDs:** Select this check box to allow the application to automatically assign customer prospect IDs to the records from GovWin Capture Management. The application will use the value in the **Last Customer Prospect ID** field on the Corporate Settings subtask of the Configure Contract Management Settings screen as the basis for assigning new IDs to the customer records from GovWin Capture Management.

> **Note:** The **Use auto-assign for Customer Prospect IDs** check box will be disabled if the **Auto-Assign Customer Prospect IDs** check box is not selected on the Corporate Settings subtask of the Configure Contract Management Settings screen.

- **Track CM 'ClientID' using UDEF:** Select the check box, and then enter or select the user-defined field label where the application will store the **Client ID** (ClientID) field value.

  > **Tip:** This option is useful if the **Use Auto-assign for Customer Prospect IDs** check box is selected. When you select the auto-assign ID function, you can specify a user-defined label where the application will store the original customer ID. If you have this setup, you will be able to view the original customer ID from GovWin Capture Management in the User Defined Info subtask of the Manage Contract Management Customer Info (CTMCUST) screen.

- **Track CM 'Client' using UDEF:** Select the check box, and then enter or select the user-defined field label where the application will store the GovWin Capture Management **Client** field value.

  > **Tip:** This option is useful if the **Use Auto-assign for Customer Prospect IDs** check box is selected. When you select the auto-assign ID function, you can specify a user-defined label where the application will store the original **Client** field value. If you have this setup, you will be able to view the original **Client** field value from GovWin Capture Management in the User Defined Info subtask of the Manage Contract Management Customer Info (CTMCUST) screen.
  >
  > The Client field from CL table in GovWin Capture Management must have a value.

- **Log Customer migration transactions:** Select this check box to create a detailed log file which contains the logs the transactions and values of every source and target column.

  > **Warning:** Using this functionality may slow down the data transfer process.

- **Use Customer Filter:** Select this check box to limit the records from GovWin Capture Management to specific customers. To filter records, use the adjacent text box to enter statements that define specific criteria for the records that come from GovWin Capture Management. The text box is limited to 255 characters.

  For example, using the following statement/syntax limits the data transfer to customer records with an **A** (Active) value in the **Status** column:

  ```
  Status = 'A'
  ```

  If you enter an invalid field name or value as a criteria, the migration will not transfer any records. The log file will indicate that zero records were transferred. If this issue occurs, you need to double-check the validity of the statement/syntax that you used as a filter.

7. Save your settings and then run the Migrate GovWin Capture Management Data process. You can either run the process directly from the screen or schedule the transfer using Costpoint Job Management applications.

   > **Tip:** If you have a large amount of data to migrate, Deltek recommends that you use the Job Management applications in the Costpoint Admin domain to schedule the data transfer.

Migrate Opportunity Information

Use the Opportunity tab on the Migrate GovWin Capture Management Data screen to include opportunity information from GovWin Capture Management in the data transfer to Costpoint.

You can access opportunity information transferred from GovWin Capture Management on the Manage Opportunities (CTMOPP) screen. The migration process takes information from the following GovWin Capture Management tables:

- Activity
- Opportunities_INPUTKeyContacts
- Opportunities_KeyDates
- Opportunity
- OpportunityClientAssoc
- OpportunityCustomTabFields
- OpportunityEMAssoc
- OpportunityVEAssoc

Warning: Before transferring opportunities from GovWin Capture Management, you must have completed the following prerequisites:

1. Create a field mapping ID for opportunity information on the Integration Field Mapping screen. This is the same ID used for migrating opportunity lookup source values.
2. Migrate the opportunities lookup values from GovWin Capture Management into Costpoint. For more information, refer to the Migrate Lookup Values into Costpoint section.
3. Define the target (Costpoint) values for the migrated opportunity lookup values on the Manage Element Value Mappings screen. For more information, refer to the Define the Target (Costpoint) Values for the Migrated Lookup Values section.

To transfer opportunity information:

1. Click **Admin** » **System Administration** » **System Administration Interfaces** » **Migrate GovWin Capture Management Data**.
2. Enter an ID for the migration settings in the **Parameter ID** field.
3. Enter or select location for logs in the **File Location** field.

   Attention: Entering a log file location optional. It is not recommended for Cloud/SAAS users. For more information refer to the Integration Process Logs section.

4. Click the Opportunity tab, and then select the **Migrate CM Opportunity Data** check box.
5. Enter or select the field mapping ID for opportunities on the **Map ID** field.

> **Note:** This mapping defines the source fields from GovWin Capture Management and the target fields in Costpoint. This mapping is maintained on the Integration Field Mapping screen.
>
> You must use the same mapping ID to transfer lookup information and the opportunity records.

6. Enter or select an opportunity record in the **Default Opportunity Record** field.

> **Note:** The migration requires an opportunity record from the Manage Opportunities screen which contains default values. When transferring GovWin Capture Management records to Costpoint, the application will use the values from this default opportunity record on fields that have no values (NULL) but are required in Costpoint.

7. Use the following settings as necessary:

   - **Use auto-assign for Opportunity IDs:** Select this check box to allow the application to automatically assign opportunity IDs to the records from GovWin Capture Management. The application will use the value in the **Last Opportunity ID** field on the Configure Opportunity Settings screen as the basis for assigning new IDs to the vendor records from Capture Management.

     > **Note:** The **Use auto-assign for Opportunity IDs** check box will be disabled if the **Auto-Assign Opportunity IDs** check box on the Configure Opportunity Settings screen is not selected.

   - **Track CM 'Opportunity' using UDEF:** Select the check box, and then enter or select the user-defined field label where the application will store the Opportunity number from GovWin Capture Management.

     > **Tip:** This option is useful if the **Use Auto-assign for Opportunity IDs** check box is selected. When you select the auto-assign ID function, you can specify a user-defined label where the application will store the original Opportunity ID. If you have this setup, you will be able to view the original opportunity ID from GovWin Capture Management in the User-Defined Info subtask of the Manage Opportunities (CTMOPP) screen.

   - **Log Opportunity migration transactions** Select this check box to create a detailed log file which contains the logs the transactions and values of every source and target column.

     > **Warning:** Using this functionality may slow down the data transfer process.

   - **Use Opportunity Filter** Select this check box to limit the records from GovWin Capture Management to specific opportunities. To filter records, use the adjacent text box to enter statements that define specific criteria for the records that come from GovWin Capture Management. The text box is limited to 255 characters.

     For example, using the following statement/syntax limits the data transfer to opportunity records with an **A** (Active) value in the **Status** column:

     ```
     Status = 'A'
     ```

If you enter an invalid field name or value as a criteria, the migration will not transfer any records. The log file will indicate that zero records were transferred. If this issue occurs, you need to double-check the validity of the statement/syntax that you used as a filter.

8. Save your settings and then run the Migrate GovWin Capture Management Data process. You can either run the process directly from the screen or schedule the transfer using Costpoint Job Management applications.

> **Tip:** If you have a large amount of data to migrate, Deltek recommends that you use the Job Management applications in the Costpoint Admin domain to schedule the data transfer.

Migrate Contract Information

Use the Contract tab on the Migrate GovWin Capture Management Data screen to include contract/project information from GovWin Capture Management in the data transfer to Costpoint.

You can access the contract information transferred from GovWin Capture Management on the Manage Contracts (CTMCNTR) screen. The migration process takes information from the following GovWin Capture Management tables:

- Activity
- CLAddress
- Contacts
- EMMain
- EMProjectAssoc
- Opportunity
- PR
- PRClientAssoc
- PRContactAssoc
- Project_Options
- ProjectCustomTabFields
- Projects_Deliverables
- Projects_Modifications
- VEProjectAssoc

Warning: Before transferring contracts from GovWin Capture Management, you must have completed the following prerequisites:

1. Make sure to migrate vendor, customer, and opportunity information first before migrating contracts. Please take note that prospective customer and vendors should have gone through the approval process in Costpoint before bringing them to contracts.
2. Create a field mapping ID for contract information on the Integration Field Mapping screen. This is the same ID used for migrating contract lookup source values.
3. Migrate the opportunities lookup values from GovWin Capture Management into Costpoint. For more information, refer to Migrate Lookup Values into Costpoint section.
4. Define the target (Costpoint) values for the migrated opportunity lookup values on the Manage Element Value Mappings screen.

To migrate contract information:

1. Click **Admin** » **System Administration** » **System Administration Interfaces** » **Migrate GovWin Capture Management Data**.
2. Enter an ID for the migration settings in the **Parameter ID** field.
3. Enter or select location for logs in the **File Location** field.

> **Attention:** Entering a log file location optional. It is not recommended for Cloud/SAAS users. For more information refer to the Integration Process Logs section.

4. Click the Contract tab, and then select the **Migrate CM Contract Data** check box.
5. Enter the field mapping ID for contracts in the **Map ID** field.

> **Note:** This mapping defines the source fields from GovWin Capture Management and the target fields in Costpoint. This mapping is maintained on the Integration Field Mapping screen.

6. Enter or select a contract record in **Default Contract Record** field.

> **Note:** The migration requires a contract record from the Manage Contracts screen which contains default values. When transferring GovWin Capture Management records to Costpoint, the application will use the values from this default contract record on fields that have no values (NULL) but are required in Costpoint.

7. Use the following settings as necessary:
   - **Use auto-assign for Contract IDs:** Select this check box to allow the application to automatically assign contract IDs to the records from GovWin Capture Management. The application will use the value in the **Last Contract ID** field on the Configure Contract Management Settings screen as the basis for assigning new IDs to the vendor records from GovWin Capture Management.

     > **Note:** The **Use auto-assign for Contract IDs** check box will be disabled if the **Auto-Assign Contract IDs** check box on the Configure Contract Management Settings screen is not selected.

   - **Track CM 'WBS1' using UDEF:** Select the check box, and then enter or select the user-defined field label where the application will store the **WBS1** column value from GovWin Capture Management. You will be able to view the value from GovWin Capture Management in the User-Defined Info subtask of the Manage Contracts screen.
   - **Track CM 'WBS2' using UDEF:** Select the check box, and then enter or select the user-defined field label where the application will store the **WBS2** column value from GovWin Capture Management. You will be able to view the value from GovWin Capture Management in the User-Defined Info subtask of the Manage Contracts screen.
   - **Track CM 'WBS3' using UDEF:** Select the check box, and then enter or select the user-defined field label where the application will store the **WBS3** column value from GovWin Capture Management. You will be able to view the value from GovWin Capture Management in the User-Defined Info subtask of the Manage Contracts screen.
   - **Log Contract migration transactions:** Select this check box to create a detailed log file which contains the logs the transactions and values of every source and target column.

     > **Warning:** Using this functionality may slow down the data transfer process.

   - **Use Contract Filter:** Select this check box to limit the records from GovWin Capture Management to specific contracts. To filter records, use the adjacent text box to enter

statements that define specific criteria for the records that come from GovWin Capture Management. The text box is limited to 255 characters.

For example, using the following statement/syntax limits the data transfer to contract records with an **A** (Active) value in the **Status** column:

```
Status = 'A'
```

If you enter an invalid field name or value as a criteria, the migration will not transfer any records. The log file will indicate that zero records were transferred. If this issue occurs, you need to double-check the validity of the statement/syntax that you used as a filter.

8. Save your settings and then run the Migrate GovWin Capture Management Data process. You can either run the process directly from the screen or schedule the transfer using Costpoint Job Management applications.

> **Tip:** If you have a large amount of data to migrate, Deltek recommends that you use the Job Management applications in the Costpoint Admin domain to schedule the data transfer.

Integration Process Logs

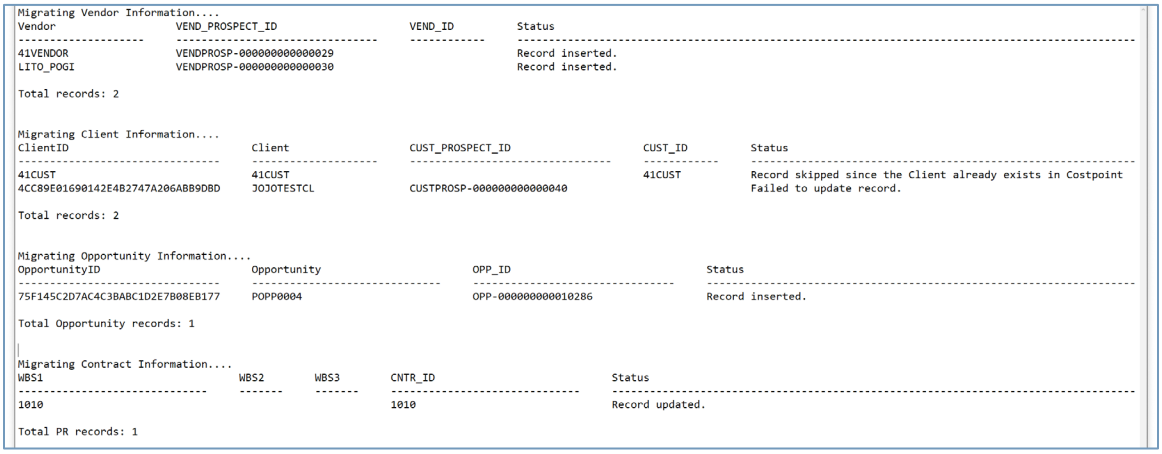
The migration process creates files that log the information transferred from GovWin Capture Management to Costpoint.

The following are two types of process logs for the GovWin Capture Management data migration:

- **Summary Log** - This file provides the source values and total number of records that were inserted, updated, rejected, and skipped by the migration process. The file name format of the Summary Log is:

  `[Application Name]_[Parameter Name]_[Time Stamp].log`

  Sample integration summary log:

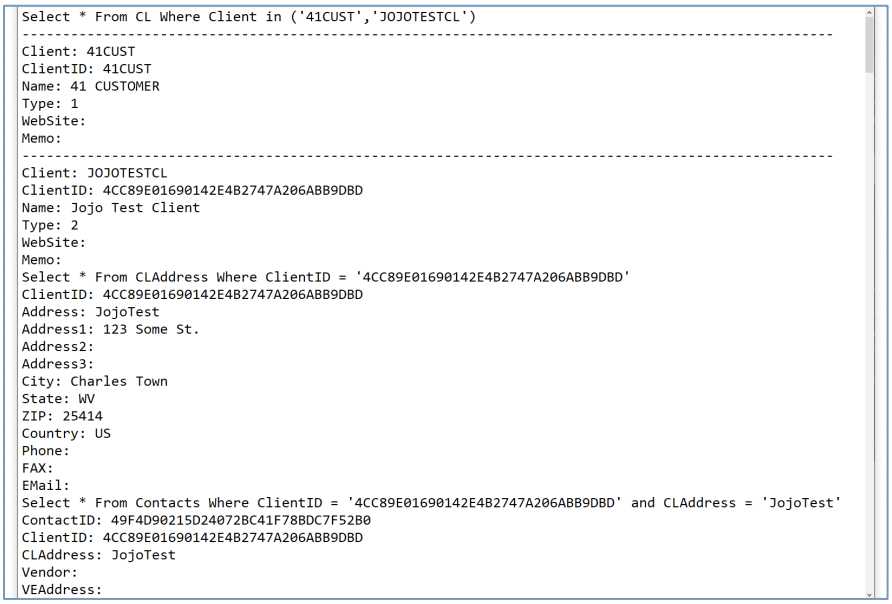


```
Migrating Vendor Information....
Vendor                  VEND_PROSPECT_ID                    VEND_ID         Status
--------------------    --------------------------------    ------------    ----------------------------------------------------------------------------------------------------
41VENDOR                VENDPROSP-000000000000029                           Record inserted.
LITO_POGI               VENDPROSP-000000000000030                           Record inserted.

Total records: 2


Migrating Client Information....
ClientID                            Client                  CUST_PROSPECT_ID                    CUST_ID         Status
--------------------------------    --------------------    --------------------------------    ------------    ----------------------------------------------------------------
41CUST                              41CUST                                                      41CUST          Record skipped since the Client already exists in Costpoint
4CC89E01690142E4B2747A206ABB9DBD    JOJOTESTCL              CUSTPROSP-000000000000040                           Failed to update record.

Total records: 2


Migrating Opportunity Information....
OpportunityID                       Opportunity                     OPP_ID                          Status
--------------------------------    ----------------------------    ----------------------------    ----------------------------------------------------------------------
75F145C2D7AC4C3BABC1D2E7B08EB177    POPP0004                        OPP-000000000010286             Record inserted.

Total Opportunity records: 1


Migrating Contract Information....
WBS1                            WBS2        WBS3        CNTR_ID                         Status
----------------------------    -------     -------     ----------------------------    ----------------------------------------------------------------------
1010                                                    1010                            Record updated.

Total PR records: 1
```

- **Transactional Logs** (Optional) — This captures each field value that was processed, the corresponding source field in GovWin Capture Management, and the target field in Costpoint. The file name format of the Transactional log is:

  `[Application ID]_[Parameter Name]_[Object Name]_[Time Stamp].log`

  Sample data transaction log (source):



```
Select * From CL Where Client in ('41CUST','JOJOTESTCL')
-----------------------------------------------------------------------------------------------------
Client: 41CUST
ClientID: 41CUST
Name: 41 CUSTOMER
Type: 1
WebSite:
Memo:
-----------------------------------------------------------------------------------------------------
Client: JOJOTESTCL
ClientID: 4CC89E01690142E4B2747A206ABB9DBD
Name: Jojo Test Client
Type: 2
WebSite:
Memo:
Select * From CLAddress Where ClientID = '4CC89E01690142E4B2747A206ABB9DBD'
ClientID: 4CC89E01690142E4B2747A206ABB9DBD
Address: JojoTest
Address1: 123 Some St.
Address2:
Address3:
City: Charles Town
State: WV
ZIP: 25414
Country: US
Phone:
FAX:
EMail:
Select * From Contacts Where ClientID = '4CC89E01690142E4B2747A206ABB9DBD' and CLAddress = 'JojoTest'
ContactID: 49F4D90215D24072BC41F78BDC7F52B0
ClientID: 4CC89E01690142E4B2747A206ABB9DBD
CLAddress: JojoTest
Vendor:
VEAddress:
```

Sample transaction log (target):

```
<CTMCUST_CUST>
  <CUST_PROSPECT_ID>CUSTPROSP-000000000000040</CUST_PROSPECT_ID>
  <CUST_ID>JOJOTESTCL</CUST_ID>
  <CUST_REC_STATUS>P</CUST_REC_STATUS>
  <CUST_NAME>Jojo Test Client</CUST_NAME>
  <CUST_LONG_NAME>Jojo Test Client</CUST_LONG_NAME>
  <CUST_TYPE_DC>GOVERNMENT</CUST_TYPE_DC>
  <S_CREDIT_STATUS_CD>P</S_CREDIT_STATUS_CD>
  <CUST_WEB_SITE></CUST_WEB_SITE>
  <CUST_NOTES></CUST_NOTES>
  <CMMIG_SOURCE>Y</CMMIG_SOURCE>
  <CMMIG_CLIENT>JOJOTESTCL</CMMIG_CLIENT>
  <CMMIG_CLIENT_ID>4CC89E01690142E4B2747A206ABB9DBD</CMMIG_CLIENT_ID>
  <CMMIG_AUTO_ASSIGN>N</CMMIG_AUTO_ASSIGN>
  <SYS_ASSIGN_FL>N</SYS_ASSIGN_FL>
  <CTMUDINF_UDEFLBL_CHLD>
    <UDEF_LBL>SALES PERSON TEST</UDEF_LBL>
    <UDEF_LBL_KEY>3.0</UDEF_LBL_KEY>
    <S_DATA_TYPE>T</S_DATA_TYPE>
    <S_CASE_LBL></S_CASE_LBL>
    <VALIDATE_FL>Y</VALIDATE_FL>
    <REQD_FL>N</REQD_FL>
    <SEQ_NO>1.0</SEQ_NO>
    <UDEF_TXT></UDEF_TXT>
    <UDEF_AMT></UDEF_AMT>
    <UDEF_DT></UDEF_DT>
  </CTMUDINF_UDEFLBL_CHLD>
  <CTMUDINF_UDEFLBL_CHLD>
    <UDEF_LBL>SALES MANAGER</UDEF_LBL>
    <UDEF_LBL_KEY>12.0</UDEF_LBL_KEY>
    <S_DATA_TYPE>T</S_DATA_TYPE>
    <S_CASE_LBL></S_CASE_LBL>
    <VALIDATE_FL>Y</VALIDATE_FL>
    <REQD_FL>N</REQD_FL>
```

Location of Integration Process Logs

Costpoint store logs created by the migration process in the following two locations:

- The location that you entered in the **Integration Process Log** field on the Migrate GovWin Capture Management Data screen.
- If you opt not to enter a location in **Integration Process Log** field, Costpoint will store the process logs in the database.

After you run the migration, you can access or download the process logs through the File Download (SYMDLMGR) screen.

Tip: For Cloud/SAAS users, Deltek recommends **not** to specify a location in the **Integration Process Log** field to enable Costpoint to store the process logs in the database. This will allow you to view or download the process logs from the File Download screen without the need to request the files from Deltek Cloud operations.

Download Process Logs from Costpoint Database

If you ran the Migrate GovWin Capture Management Data process with no location entered in the **Integration Process Log** field, Costpoint stores the data migration process logs in the database and you can view or download the process logs from the File Download screen (SYMDLMGR).

To view or download the process logs from Costpoint database, complete the following steps:

1. Click **Admin** » **System Administration** » **File Management** » **File Download** screen.
2. On the Download from Database table, click **Query**.
3. On the Query window, click the **Query** tab.

4. In the three **Query Condition** fields, specify the following, and then click the plus symbol (+):
   - **Application ID** (first field)
   - **is equal to (=)** (second field)
   - **AOPCPDAT** (third field)
5. Click the **Sort** tab
6. In the **Sort Records by** fields, select the following, and then click the plus symbol (+):
   - **Last Modified** (first field)
   - **Descending** (second field).
7. Click **Query**. The screen will list the file logs of the Migrate GovWin Capture Management Data screen from the latest process log created.
8. On the **Download Files from Database** table, click the process log that you want to view or download, and then click **Download File**.
9. Open the file directly from the browser, or save the file to your computer; and then open the downloaded file.

Download Process Logs from Alternate Location

If you ran the Migrate GovWin Capture Management Data process with a location entered in the **Integration Process Log** field, you can view or download the process logs from the File Download screen (SYMDLMGR).

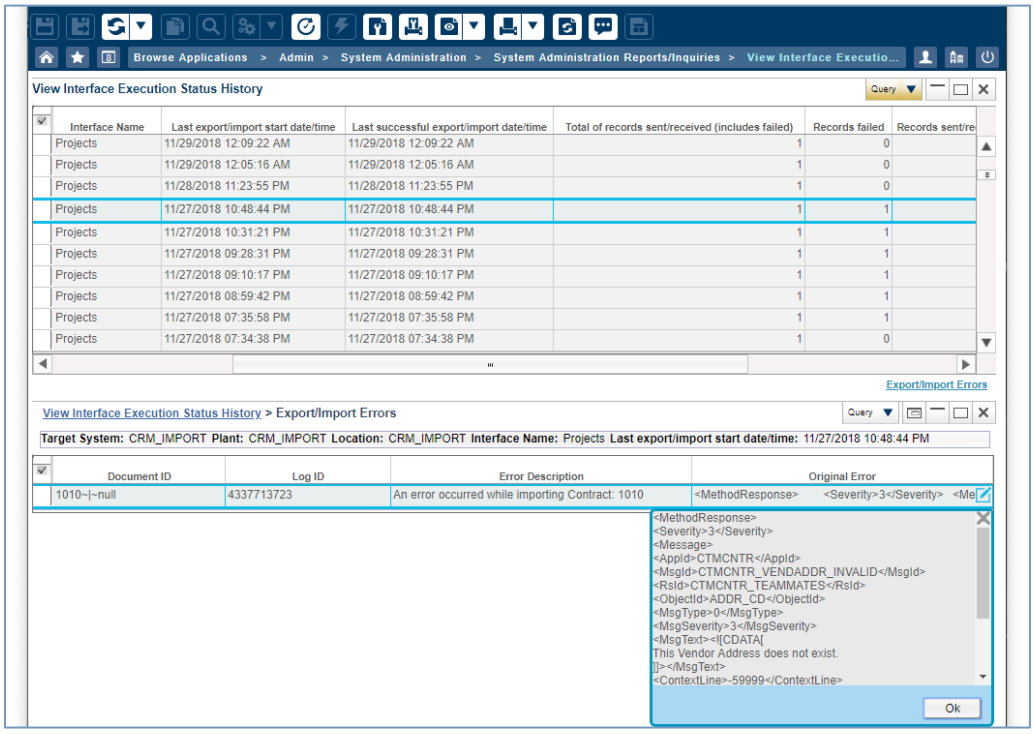
To view or download the process logs from an alternate location, complete the following steps:

1. Click **Admin** » **System Administration** » **File Management** » **File Download** screen.
2. In the **Select Alternate File Location** section, enter or select a valid location in the **File Location** field.
3. On **Download Files from Alternate File Location** table, click the process log that you want to view or download, and then click **Download File**.
4. Open the file directly from the browser; or save the file to your computer, and then open the downloaded file.

Integration Troubleshooting

When you encounter migration issues, you can refer to the process log files or the migration errors for more information on what occurred during the process. You can use the log information to troubleshoot and address the issues with the migration.

View Migration Errors on the View Interface Execution Status History Screen



After you run the Migrate GovWin Capture Management Data process, you can view the validation errors from the Export/Import Errors subtask of the View Interface Execution Status History screen.

To view migration errors:

1. Click **Administration** » **System Administration** » **System Administration Reports/Inquiries** » **View Interface Execution Status History**.
2. On the table, click **Query**.
3. In the Find tab, enter **CRM_IMPORT** in the **Target System** field, and then click **Find**.
4. From the results, click the row for the data integration process that you want to view.
5. Click the Import/Export Errors subtask.
6. Click the text entry icon in the **Original Error** column.
7. Copy the error and paste the information to a text editor (for example, Notepad) to view the error details.

Troubleshooting Steps

The following table provides remediation steps for errors/issues that you may encounter during integration:

Issue	Remediation

Connection error	▪ Verify your Costpoint Configuration Utility settings. You may need to increase the timeout settings. Refer to the Configure Connection Settings for Data Migration for more information.
	▪ Review server/firewall policies, and perform the following:
	  ▪ Whitelist GovWin Capture Management Web Service's IP address.
	  ▪ Open ports for HTTP or HTTPS access

Validation errors (Value not found in Costpoint / Missing values)	▪ Verify GovWin Capture Management to Costpoint mappings on the Integration Field Mapping screen. Refer to the Define the Field Mapping for Opportunities and Contracts section for more information. ▪ Verify lookup mappings on the Manage Element Value Mappings screen. Refer to Define Target (Costpoint) Values for the Migrated Lookup Source Values for more information. ▪ Verify that dependent data has been migrated or approved. For example, Customer records related to Contract.
Process logs are not generated.	▪ Check that the log file location specified in **Integration Process Log - File Location** field the on the Migrate GovWin Capture Management Data screen is valid. ▪ Ensure that Costpoint has read and write access to the file location provided. ▪ Refer to the Integration Process Logs section for more information.

Guidelines to Rerun the Migration

When you need to run the migration process again due to issues and errors that occurred in a previous attempt, use the following best practices:

- After identifying records that failed to transfer to Costpoint, use the front-end of the corresponding maintenance applications to correct/update the data. This option takes advantage of the validations in the maintenance application. Directly updating the database is not recommended in this scenario.
- Create a new Parameter ID on the Migrate GovWin Capture Management Data screen that will be used specifically for rerunning the migration. In this Parameter ID:`

- Limit the selection criteria for records using the filtering functionality in for each type of information. For example, for opportunity records, select the **Use Opportunity Filter** check box on the Opportunity tab on the Migrate GovWin Capture Management Data screen, and then enter statements in text box that will isolate the migration to certain records only.
- If you are migrating a large amount of data, you can use the filtering option to transfer data in manageable batches. For example, select only a range of opportunity IDs to include in each migration run.

Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using GovWin Capture Management Data Migration, 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.

Additional Documentation

The following table lists the Deltek documentation available for this release. Except where noted, all the user guides and quick reference guides listed in this table are available for download from the Deltek Support Center.

Document Name	Description
Deltek Costpoint 7.1.1 GovWin Capture Management Data Migration Database Mapping Guide	This guide provides the mapping of database tables and columns between GovWin Capture Management and Costpoint. The Migrate GovWin Capture Management Data (AOPCPDAT) screen in Costpoint uses this mapping when processing records from GovWin Capture Management. This includes standard and default mapping for the following types of data: ▪ Vendor ▪ Customer (Client) ▪ Opportunity ▪ Contract (Projects)

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