



Deltek.ProPricer

Integration Pro Quick Start Guide

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Welcome to Integration Pro

ProPricer™ Integration Pro is an application that allows you to easily transfer pricing and proposal data between a ProPricer database and Microsoft SQL, PostgreSQL, Oracle, Microsoft Excel, Deltek Costpoint, SAP, or ODBC Hybrid databases.

In the Integration Pro user interface, you can manage database connections and define data mapping files, which determine the data that is transferred between your databases.

This quick start guide covers how the application works including navigating the user interface, connecting to your databases, creating and defining data mapping files, and various ways to run your import or export processes.

How it works

To complete a data transfer, you must first connect to your ProPricer database and Microsoft SQL, PostgreSQL, Oracle, Microsoft Excel, Deltek Costpoint, SAP, or ODBC Hybrid databases. Then, you can create a data mapping file that determines the data that will be transferred between your databases.

Data mappings are saved in an encrypted XML file that is stored on your machine. There are two kinds of data mappings that can be created:

- Import mapping: Transfers data from a ProPricer database and a Microsoft SQL, PostgreSQL, Oracle, Microsoft Excel, Deltek, SAP, or ODBC Hybrid database.
- Export mapping: Transfers data from a ProPricer database to a Microsoft SQL, PostgreSQL, Oracle, or Microsoft Excel database.

To complete the import or export process, open the data mapping in the application and click Run on the Main ribbon. You can also use a command line parameter, which is useful when you want to automatically transfer data on a schedule with Windows Task Scheduler or Windows Powershell.

Important notes

There are a few important things you should know about using Integration Pro:

- When data is imported from a Microsoft SQL, PostgreSQL, Oracle, Microsoft Excel, Deltek Costpoint, SAP, or ODBC Hybrid database into a ProPricer database, the existing data in ProPricer will be overwritten.
- A ProPricer user account is required to process data transfers. The login credentials for the user who creates a data mapping are saved in the encrypted XML file.
- Data that is imported into ProPricer must fall within the ProPricer system dates. Data that is outside of the system dates will not be imported. These dates are set on the General page of System Options in ProPricer.

Essentials vs Enterprise

ProPricer offers two tiers of Integration Pro: Essentials and Enterprise. The Essentials tier allows you to create and edit one import data mapping file and one export data mapping file. With the Enterprise tier, you can create and edit as many data mapping files as you need.

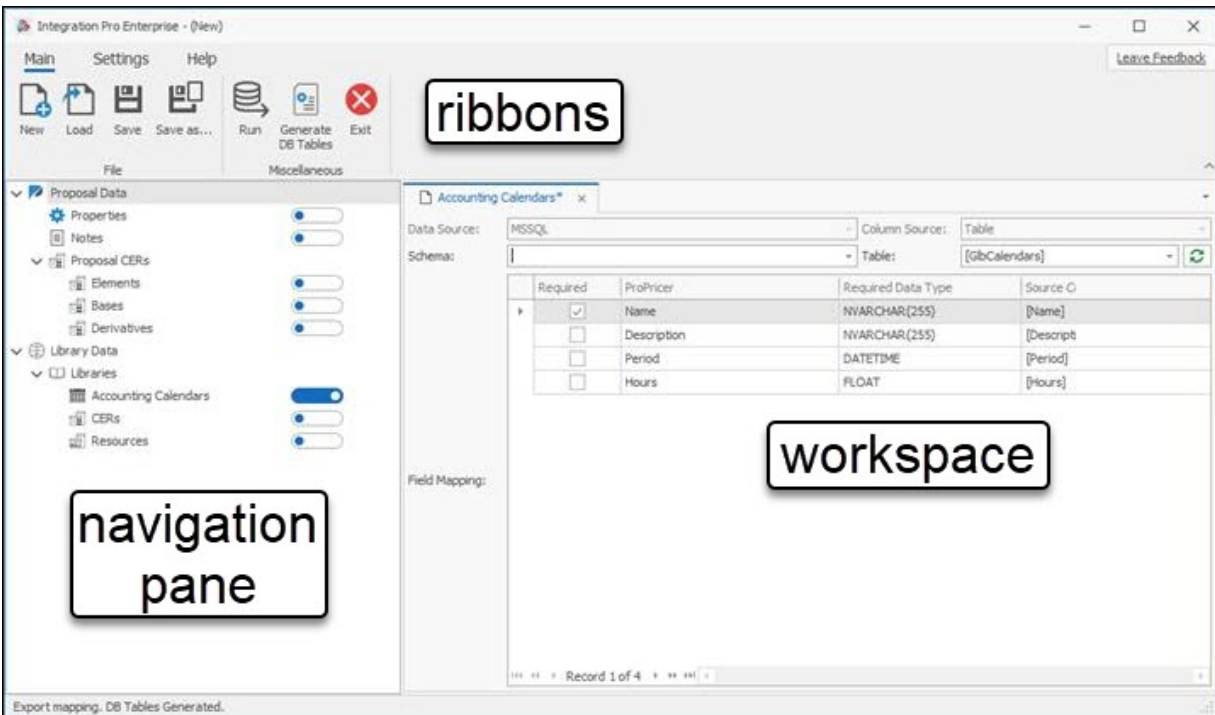
In the Essentials tier, the import data mapping file is called config.diimp and the export data mapping file is called config.diexp. These files can be found at (C:) > Program Files > EBS > ProPricer IP after the application has been installed.

Requirements

- The correct corresponding version of ProPricer. For example, Integration Pro version 4.6.101.1 requires ProPricer version 9.6.101.1.
- ProPricer Application Server version 9.6.101.1.
- A current license key purchased from Deltek, Inc.

User interface

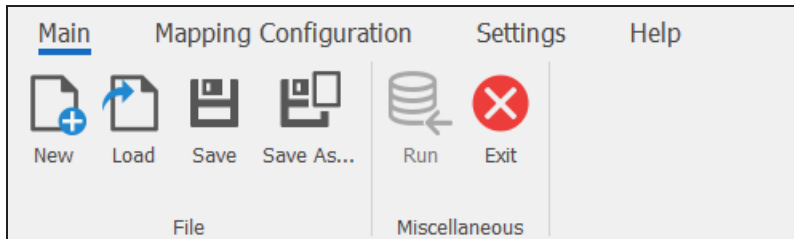
Integration Pro's user interface has three areas: the ribbons, the navigation pane, and the workspace. The following sections of this guide will explain the functions in each of these areas.



- The Leave Feedback button links to the [Integration Pro Ideas Portal](#) where you can leave us your suggestions and ideas for future releases.

Main ribbon

The buttons on the Main ribbon allow you to open and save your data mappings, create data selections, run import or export processes, and more.



File

The buttons available in the File group of the Main ribbon depend on the tier of Integration Pro you are using—Essentials or Enterprise. To learn more about the difference between these tiers, see [Essentials vs Enterprise](#).

Enterprise

- New: Create a new data mapping.
- Load: Open an existing data mapping.
- Save: Save the current data mapping.
- Save As: Create a new encrypted XML file for the current data mapping.

Essentials

- Open Import Config: Open your import data mapping file. This file is called config.diimp.
- Open Export Config: Open your export data mapping file. This file is called config.diexp.

Miscellaneous

- Run: Run the import or export process.
- Generate DB Tables: Create empty Microsoft SQL, Oracle, or PostgreSQL database tables that are formatted for ProPricer data.
- Exit: Close Integration Pro.

Rates/Tables selections

Rates/tables selections are groups of ProPricer tables that meet specific criteria. They are used to filter the data that is included in an import or export.

Currently, selections can be created for five types of ProPricer tables: CER factor tables, indirect rate tables, direct rate tables, rate band tables, and travel rate tables. These selections are only available in Integration Pro, they cannot be used in ProPricer.

To create a new rates/tables selection, complete the following procedure:

1. On the Settings ribbon, click Rates/Tables Selections.
2. In the dialog box, under the Name column, enter a name for the selection.
3. Under the Type column, select the type of table for the selection.
4. Under the Field Name, Function, Condition, and Value columns, select specific criteria for the selection.
5. Click Save to save your selections.

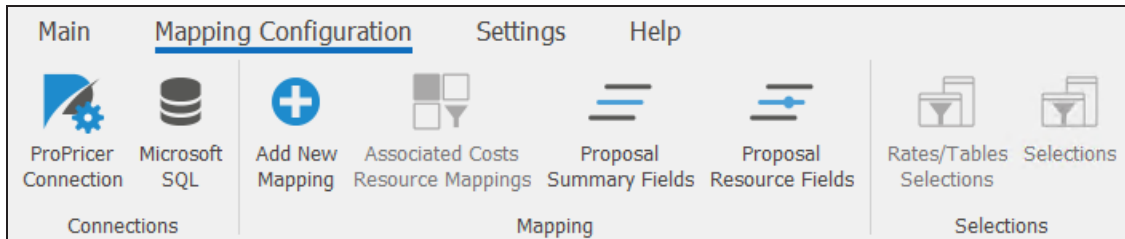
Generate database tables

The Generate DB Tables feature creates empty Microsoft SQL, Oracle, and PostgreSQL database tables that are formatted for ProPricer data. This saves time spent on setting up database tables for importing and exporting. The feature can also create script files containing commands that create the database tables.

1. On the Main ribbon, click Generate DB Tables.
2. In the dialog box, double-click a table to change its name, or right-click a table to delete it from the list.
3. In the Target field, select one of the following options:
 - Database: Create the formatted tables.
 - Files: Create a script file with commands to create the formatted tables.
4. In the Script File field, select the location that the script file is saved to.
5. Select the Automatically Map Tables checkbox to automatically map the table columns to ProPricer data fields.
6. Click OK.

Mapping Configuration ribbon

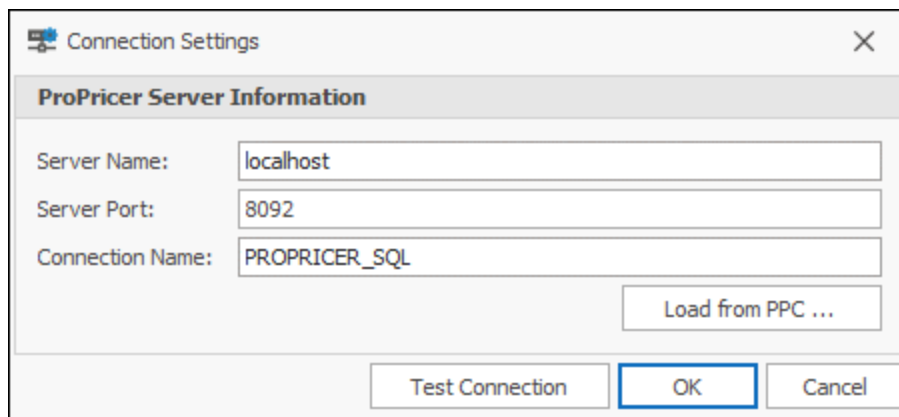
The buttons on the Mapping Configuration ribbon allow you to manage your database connections and import and export settings.




Connections

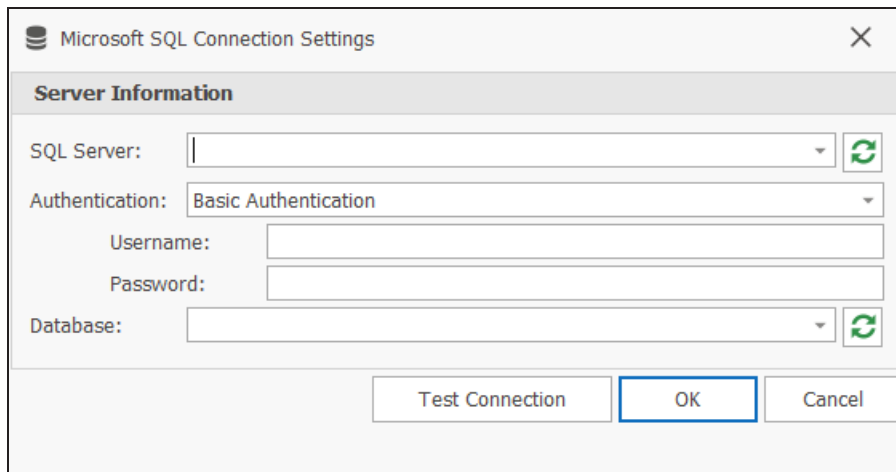
Connect to a ProPricer database

1. On the Mapping Configuration ribbon, in the Connections group, click ProPricer.
2. In the dialog box that appears, click Load from PPC, then select the .ppc file for your database in the file explorer.
3. Click Test Connection to check that the connection is working.
4. Click OK.




Connect to a Microsoft SQL database

1. Open Integration Pro, then in the dialog that appears, select Microsoft SQL in the Data Source field and click OK.
2. On the Mapping Configuration ribbon, in the Connections group, click Microsoft SQL.
3. In the dialog box that appears, next to the SQL Server field, click . Then select your Microsoft SQL server in the field.
4. In the Authentication field, select one of the following:
 - Server Authentication: Allows you to enter the username and password to access your Microsoft SQL server.
 - Windows Authentication: Uses your Windows login credentials to access your Microsoft SQL server.
5. In the Database field, select your Microsoft SQL database. Then click Test Connection to check that the connection is working.
6. Click OK.



Microsoft SQL Connection Settings


Server Information

SQL Server: 

Authentication: Basic Authentication

Username:

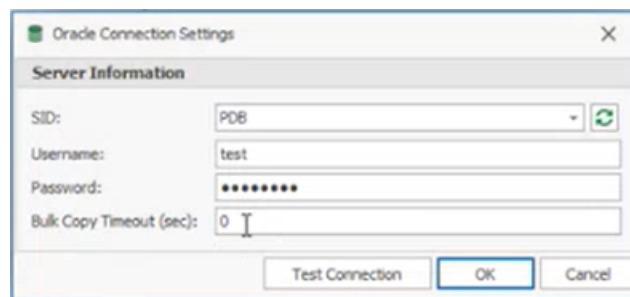
Password:

Database: 

Test Connection OK Cancel


Connect to an Oracle database

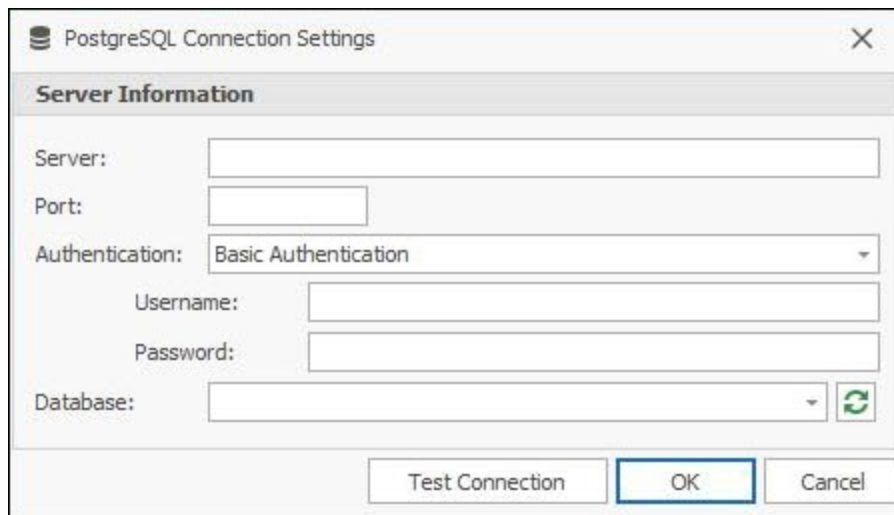
1. Open Integration Pro, then in the dialog that appears, select Oracle in the Data Source field and click OK.
2. On the Mapping Configuration ribbon, in the Connections group, click Oracle.
3. In the SID field, enter your Oracle system identifier.
4. In the Username and Password fields, enter your login credentials for the Oracle database.
5. In the Bulk Copy Timeout field, enter an amount of time in seconds. The default time is 1800 seconds (30 minutes).
6. Click Test Connection to check that the connection is working.
7. Click OK.



The screenshot shows the 'Oracle Connection Settings' dialog box. It has a title bar with a close button (X). Below the title bar is a section titled 'Server Information'. This section contains four fields: 'SID:' with a dropdown menu showing 'PDB' and a refresh icon; 'Username:' with a text box containing 'test'; 'Password:' with a text box containing seven asterisks; and 'Bulk Copy Timeout (sec):' with a text box containing '0'. At the bottom of the dialog are three buttons: 'Test Connection', 'OK', and 'Cancel'.

Connect to a PostgreSQL database

1. Open Integration Pro, then in the dialog that appears, select PostgreSQL in the Data Source field and click OK.
2. On the Mapping Configuration ribbon, in the Connections group, PostgreSQL.
3. Enter the server and port for your PostgreSQL database.
4. In the Authentication field, select one of the following options, then enter your username and password.
 - Basic Authentication: Allows you to enter the username and password to access your PostgreSQL server.
 - Windows Authentication: Uses your Windows login credentials to access your Microsoft SQL server.
5. Next to the Database field, click , then select your PostgreSQL database.
6. Click OK.



PostgreSQL Connection Settings

Server Information


Server:

Port:

Authentication: Basic Authentication

Username:

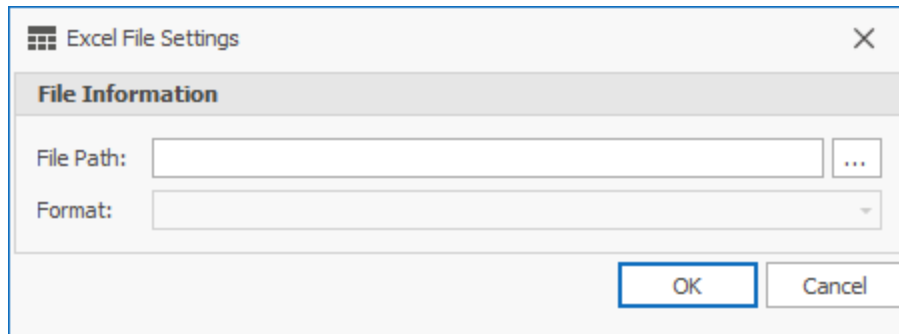
Password:

Database: 

Test Connection OK Cancel

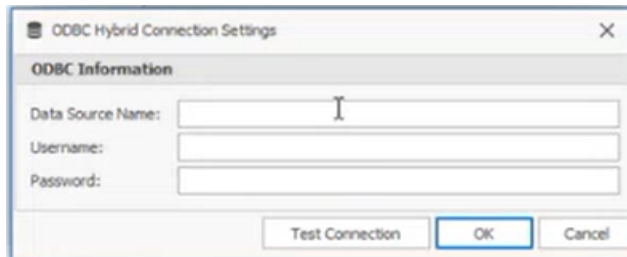
Connect to Microsoft Excel

1. Open Integration Pro, then in the dialog that appears, select Excel File in the Data Source field and click OK.
2. On the Mapping Configuration ribbon, in the Connections group, click Excel File.
3. Enter the file path and select the file format.
4. Click OK.



Connect to a Deltek Costpoint environment

1. Open Integration Pro, then in the dialog that appears, select Deltek Costpoint in the Data Source field and click OK.
2. On the Mapping Configuration ribbon, in the Connections group, click Costpoint.
3. In the Data Source Name field, enter the data source name for the Costpoint environment.
4. In the Username and Password fields, enter your login credentials for the Costpoint environment.
5. Click Test Connection to check that the connection is working.
6. Click OK



ODBC Hybrid Connection Settings

ODBC Information

Data Source Name:

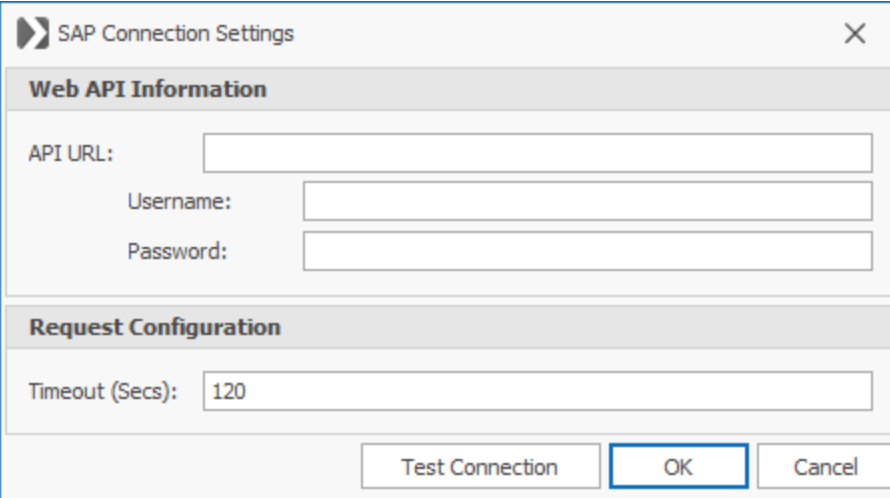
Username:

Password:

Test Connection OK Cancel

Connect to a SAP environment

1. Open Integration Pro, then in the dialog that appears, select SAP in the Data Source field and click OK.
2. On the Mapping Configuration ribbon, in the Connections group, click SAP.
3. Enter the URL for your SAP environment.
4. In the Username and Password fields, enter your login credentials for the SAP environment.
5. In the Timeout field, enter an amount of time in seconds. This is when SAP web API connection will be canceled after making a request.
6. Click Test Connection to check that the connection is working.
7. Click OK



The screenshot shows a dialog box titled "SAP Connection Settings" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Web API Information" and "Request Configuration".

Web API Information

- API URL:
- Username:
- Password:

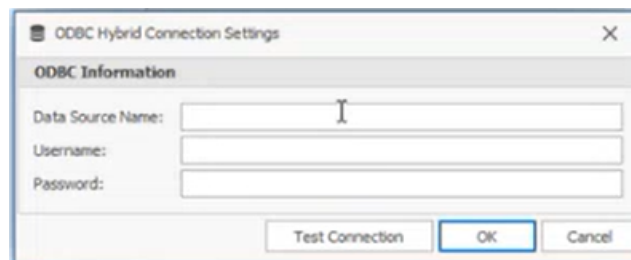
Request Configuration

- Timeout (Secs):

At the bottom of the dialog, there are three buttons: "Test Connection", "OK", and "Cancel". The "OK" button is highlighted with a blue border.

Connect to an ODBC Hybrid environment

1. Open Integration Pro, then in the dialog that appears, select ODBC Hybrid in the Data Source field and click OK.
2. On the Mapping Configuration ribbon, in the Connections group, click ODBC Hybrid.
3. In the Data Source Name field, enter the data source name for the ODBC Hybrid environment.
4. In the Username and Password fields, enter your login credentials for the ODBC Hybrid environment.
5. Click Test Connection to check that the connection is working.
6. Click OK



The screenshot shows a dialog box titled "ODBC Hybrid Connection Settings" with a close button (X) in the top right corner. Below the title bar is a section labeled "ODBC Information". This section contains three text input fields: "Data Source Name:", "Username:", and "Password:". The "Data Source Name" field has a cursor in it. At the bottom of the dialog, there are three buttons: "Test Connection", "OK", and "Cancel". The "OK" button is highlighted with a blue border.

Mapping

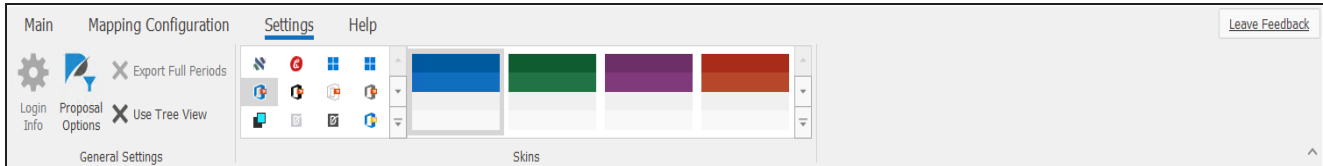
- **Add New Mapping:** Add a new data type to the data mapping tree in the navigation pane.
- **Proposal Summary Fields:** Load ProPricer summary fields into Integration Pro. This allows you to include summary field data in a data mapping using the Task Data element. To delete a summary field from this list, select it and press Delete.

Selections

- **Rates/Tables Selections:** Create selections for ProPricer rates or tables. These selections are only available in Integration Pro, they cannot be used in ProPricer. To create a new rates/tables selection, complete the following procedure.
 1. On the Mapping Configuration ribbon, click Rates/Tables Selections.
 2. In the dialog box, under the Name column, enter a name for the selection.
 3. Under the Type column, select the type of table for the selection.
 4. Under the Field Name, Function, Condition, and Value columns, select specific criteria for the selection.
 5. Click Save to save your selections.
- **Selections (export mappings):** Apply any of the following selection types to filter data that is exported from ProPricer to your Microsoft SQL, Oracle, PostgreSQL database, or Microsoft Excel.
 - Proposal selections
 - CER factor table selections
 - Direct rate table selections
 - Travel rate table selections
 - Material selections
 - Indirect rate table selections
 - Rate band table selections

Settings ribbon

The buttons on the Settings ribbon allow you to manage your general settings and the look and feel of Integration Pro.



General Settings

- Login Info: Manage your ProPricer login credentials.
- Proposal Options (import mappings): When an import data mapping is open, you can access the following settings.
 - Proposal Template: Select a proposal template to import data into a new proposal that is created with the template's properties. To use this setting, the Proposal Properties data element must be enabled.
- Use Bulk Process: The import uses a bulk insert to improve processing time. This setting is enabled by default.
- Export Full Periods: Export a proposal's resource estimates with their full periods of performance.
- Use Tree View: In the navigation pane, view all the parent and child data elements in a tree structure. This view is disabled by default.

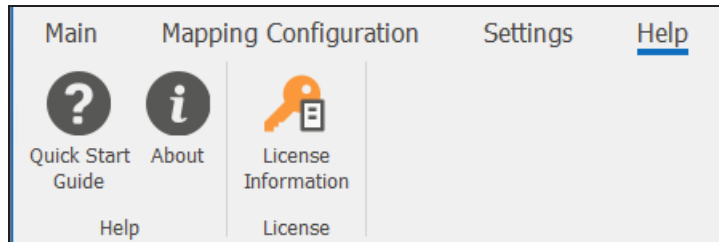
Skins

- Skins/Palettes: Change the look of Integration Pro by applying different skins and palettes.

Help ribbon

The following buttons appear on the Help ribbon:





- Quick Start Guide: Open a PDF copy of this quick start guide.
- About: Open a dialog box with version and copyright information about Integration Pro.
- License Information: Manage your registration key and view the registration status of your Integration Pro license.



License information

The License Information button allows you to manage your registration key and view the registration status of your license.

Next to the Registration Key fields, there are four buttons for managing the key:

-  If the key has been copied, click this button to paste the key into the fields.
-  If a key has been entered, click this button to apply the key.
-  Click this button to make the registration key fields available for editing.
-  Click this button to cancel the current action and revert to the last applied registration key.

Once the registration key has been activated, the Installation ID field will show an identification code that can be given to ProPricer Technical Support to resolve issues that you may have with your license.

In the drop-down menu next to Process, you can select how to activate your license with the following options:

- Online: activates your license automatically.
- By Code: directs you to the website <https://register.propricer.com/bycode> to retrieve an activation code that must be entered in the Process By Code dialog box.

The Log License Details button opens a log of information about your license and system which can be helpful for troubleshooting.

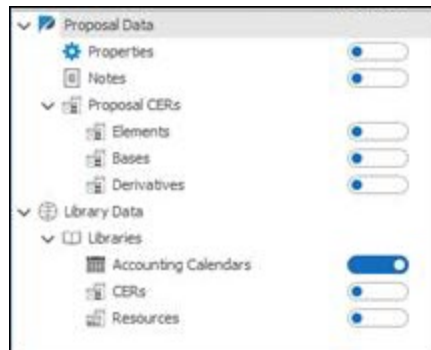
The Activate/Deactivate button will activate or deactivate your license.

Navigation pane

The navigation pane is the area where you select the specific data elements that you want to include in a data mapping.

To add a data element to the navigation pane to define its mapping, click the Add New Mapping button on the Settings ribbon.

To enable a data element, select its checkbox in the navigation pane. If a data element has its mapping defined, but it is not enabled, it will not be included in the import/export process.



Workspace

When a workspace tab for a data element is opened in the workspace, use the following buttons and fields to define the data element's mapping:

- **DB Type:** Select the database type for importing and exporting. Only the database connections that have been set up on the Settings ribbon can be selected.
- **Column Source:** Select Table or SQL to determine the source for the data mapping.
- **Table:** Select a data table from the database.
- **Refresh button:** Populate the table list with the available data tables in the selected database.
- **SQL:** Enter an SQL query to determine the source of the data.
- **Test:** Evaluates the SQL query and returns its records in a separate dialog.
- **Refresh Grid:** Refresh the Column Source values in the Field Mapping grid based on the selected table or the SQL query.
- **Handling Duplicates:** Determine the action that will be taken when duplicate data exists in the database.
 - **Skip:** Duplicate data will be skipped.
 - **Overwrite:** Duplicate data will be overwritten with the incoming data.
 - **Replace All:** All existing data will be replaced with incoming data. If a data element under Proposals is enabled, this option will delete all existing proposals in the database and replace them with any incoming proposals.
 - **Update:** This option is only available on Materials data elements that have child data. When it is used, only the items being imported will be overwritten in the database, and their child data will be deleted and replaced.
- **Field Mapping:** Map the source data to the corresponding ProPricer fields, and vice versa.

Data mappings

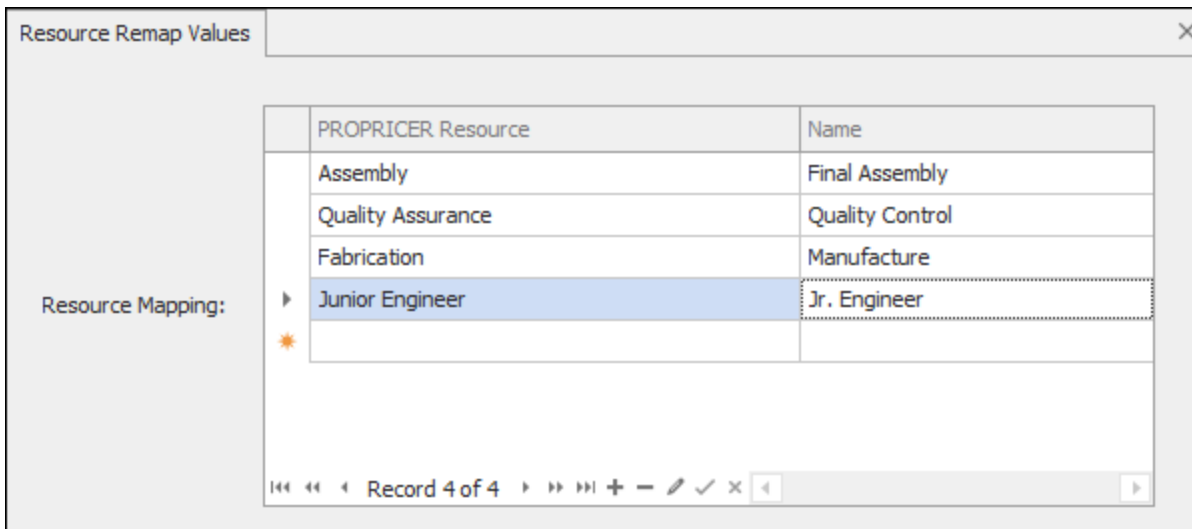
Integration Pro lets you create and edit two kinds of data mappings.

- Import mapping: Transfers data from a Microsoft SQL, PostgreSQL, Oracle, Microsoft Excel, Deltek Costpoint, SAP, or ODBC Hybrid database to a ProPricer database.
- Export mapping: Transfers data from a ProPricer database to a Microsoft SQL, Oracle, PostgreSQL, or Microsoft Excel database.

ProPricer offers two tiers of Integration Pro: Essentials and Enterprise. The Essentials tier allows you to create and edit one import data mapping file and one export data mapping file. With the Enterprise tier, you can create and edit as many data mapping files as you need.

Resource Remap Values

When creating an import data mapping for materials data, the Resource Remap Values data element located under Associated Costs allows you to enter new names for any associated cost resources in ProPricer. The names of the resources will be changed, but their rates will remain the same.



Create a new data mapping

1. On the Main ribbon, click New.
2. Select either Import or Export, then click OK.
3. On the Settings ribbon, click Add New Mapping, then select a data element.
4. In the Data Source field, select the source to use for the data transfer.
5. In the Column Source field, select Table or SQL.
 - If you select Table, you'll need to click the Refresh button before selecting a table.
6. Do one of the following:
 - Select a data table to import from or export to. If your table data is organized into schemas, select one in the Schema field.
 - Enter an SQL query to determine what data will be transferred.
7. Click Refresh Grid.
8. In the Field Mapping grid, select the ProPricer data element that you want to import from or export to.
9. For import mappings, select one of the following options in the Handling Duplicates area:
 - Skip: duplicate data will be skipped.
 - Overwrite: duplicate data will be overwritten with the incoming data.
 - Replace All: all existing data will be replaced with incoming data. If a data element under Proposals is enabled, this option will delete all existing proposals in the database and replace them with any incoming proposals.
10. On the Main ribbon, click Save As.
11. In the file explorer, select the save location for the data mapping, then click Save.

Open an existing data mapping

There are two ways to open an existing data mapping:

- On the Main ribbon, click Load, then select the data mapping file.
- In your file explorer, double-click the data mapping file.

The import/export process

There are two ways to run an import or export process:

- Open a data mapping, then on the Main ribbon click the Run button.
- Enter the command line parameters below in the Command Prompt application, or in a task automation application like Windows Task Scheduler or Windows Powershell.

After the process, a log file containing information about the process will be created. By default, this file is saved to the C drive in a folder called “Integration Pro” in the current user’s Documents folder.

Command line parameters

Action	Parameter
Run the import process.	C:\ProgramFiles\Deltek\ProPricer IP>IPImport.exe /c: [MappingFileName]
Run the export process.	C:\ProgramFiles\Deltek\ProPricer IP>IPEXport.exe /c: [MappingFileName]
Override a selection to filter data that is exported from ProPricer to your Microsoft SQL, Oracle, or PostgreSQL database. These command line parameters do not change the selection settings, they only override them. To change a selection setting, click the Selections button on the Settings ribbon.	/ps: [ProposalSelectionName] /ms: [MaterialSelectionName] /tsf: [CERFactorTableSelectionName] /tsi: [IndirectRateTableSelectionName] /tsd: [DirectRateTableSelectionName] /tsb: [RateBandTableSelectionName] /tst: [TravelRateTableSelectionName]
Enter a location for the log file.	/l: [LogFileName]
Enter a proposal template that you want to use for imports.	/pt: [ProposalTemplateName]
Show command line help.	/h or /?
Specify the detail shown in the log file.	Log the performance of the application, including the processes run, what they did, and when they started and ended: /v:p Log detailed debugging information for ProPricer technical support to troubleshoot errors and bugs: /v:d

Field Listener

Integration Pro features a field listener which runs user-defined jobs that monitor fields for changes. When a specified field is updated, the system automatically triggers an associated import or export process. The field listener can be accessed by opening **IPListenerConfigurator.exe** in the folder where Integration Pro is installed.

Settings

The field listener settings can be adjusted from settings menu on the ribbon.

Setting	Description
Server Name	The name of the connected ProPricer server.
Server Port	The port of the connected ProPricer server.
Connection Name	The ProPricer Proposal Connection name.
PPC File Path	The file path of the ProPricer Proposal Connection.
Log Path	The log path of the field listener.
Log Level	The log level of the field listener.
Retention Period	Sets the time period in days in which the field listener automatically exports changes.
Check Interval	Sets the interval in minutes in which the field listener checks for updates.

Creating and Running a Field Listener Job

To create a job and run the Integration Pro Field Listener:

1. In the job selection area enter a name for your job in the **Name** field.
2. Enter a description for your job in the **Description** field.
3. Select a proposal in the **Proposal Selection** field.
4. Click the **Run Listen** in the ribbon.

Contact Deltek

We welcome any questions, comments, or suggestions you may have about Integration Pro and this Quick Start Guide.

Contact information

Support Center: deltek.custhelp.com