



Deltek

Deltek Costpoint®

8.2

Transfer Talent
Management Data
Preprocessor

December 20, 2023

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

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

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

This edition published December 20, 2023.

© 2023 Deltek, Inc.

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

All trademarks are the property of their respective owners.



Contents

Transfer Talent Management Data.....	1
Display the Transfer Talent Management Data Screen.....	1
Contents of the Transfer Talent Management Data Screen.....	1
Table Information for the Transfer Talent Management Data Screen.....	2
Costpoint - Talent Management Integration.....	3
Talent Management Integration Overview.....	3
Talent Management Integration Connection Settings.....	3
Talent Management Integration Implementation.....	4
Scheduling a Talent Management Integration.....	5

Transfer Talent Management Data

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

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

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

The screen contains the following tabs:

- **Import:** Use this tab to configure the data transfer from Deltek Talent Management to Costpoint.
- **Export:** Use this tab to configure the data transfer from Costpoint to Deltek Talent Management.

Display the Transfer Talent Management Data Screen

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

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

Contents of the Transfer Talent Management Data Screen

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

Identification

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

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

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

Field	Description
Description	Enter, or click  to select, a parameter description of up to 30 alphanumeric characters.

Field	Description
Run Type	From the drop-down list, select the type of process that you want to run. Options are: <ul style="list-style-type: none"> ▪ Import and Export ▪ Import Only ▪ Export Only
Log File Location	Enter, or click  to select, the location of the process log file.

Table Information for the Transfer Talent Management Data Screen

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

Updated tables include:

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

Costpoint - Talent Management Integration

You need to install required Costpoint packages and apply the correct settings to transfer employee-related information between Costpoint and Deltek Talent Management.

This section provides technical guidance about setting up and running the integration between Costpoint and Talent Management. This includes specifics about the data mapping between Costpoint objects and Talent Management objects as well as troubleshooting steps for checking issues that may have occurred during the integration.

Talent Management Integration Overview

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

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

Talent Management Integration Connection Settings

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

To configure the Costpoint - Talent Management Integration connection settings:

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

- **Password (Auth Token):** Enter the authentication token provided by Talent Management.
 - **Confirm Password:** Enter the authentication token again to confirm the value.
 - **Number of Rows Per Call:** Enter the number of records (from 1 to 24999) to be sent per call to the web service.
 - **Connection Timeout (sec):** Enter the time in seconds for Costpoint to wait for a connection before a time-out occurs.
 - **Request Timeout (sec):** Enter the time in seconds for Costpoint to wait for a response, once a request has been sent, before a time-out occurs.
5. Click **Test** to check if the connection settings are correct.
 6. Restart all WebLogic servers or run the Rebuild Global Settings screen in Costpoint to allow the changes to take effect.

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

Talent Management Integration Implementation

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

Note: Before performing the steps in this topic, you must first ensure that the connection settings between Costpoint and Talent Management are properly set up.

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

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

Settings screen and select your **Manager Defaulting Method** which can be either **By Company-wide Organization** or **By HR Organization**. Then, assign managers/HR representatives to company-wide organizations or HR organizations in one of the following screens:

- If your **Manager Defaulting Method** is **By Company-wide Organization**, use the Manage Managers/HR Reps by Organization screen.
 - If your **Manager Defaulting Method** is **By HR Organization**, use the Manage Managers/HR Reps by HR Organization screen.
7. Go to Transfer Delttek Talent Management Data screen and select the type of data to be included in the integration.

Scheduling a Talent Management Integration

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

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

To create schedule a job for the integration:

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

Note: The Manage Job Queues screen is normally restricted to a system administrator for the purpose of creating and managing job queues in Costpoint.

3. Go to the Submit Job to Queue screen and submit the **Job ID** to the job queue.
 - Query the **Job ID** from the Manage Jobs screen.
 - Enter, or click  to select, the **Job Queue ID** from the Manage Job Queues screen.
 - Use the fields on the screen to schedule the start time/date and recurrence of the job.
 - Click **Submit to Queue**.
4. Go to the Start/Stop Job Server screen and start the server attached to the Job Queue.
 - On the **Job Servers** table, locate the **Attached Server** name from the Manage Job Queues screen.

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

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