

Deltek Maconomy 2.2.6

Maconomy Integration with Talent Management

September 28, 2018

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

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

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

This edition published September 2018.

© Deltek, Inc.

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

All trademarks are the property of their respective owners.

Contents

- Overview 1
 - Workflows 1
 - Field Mapping 1
- Talent Management Setup 4
 - Before You Begin 4
 - Integration Setup 4
- Maconomy Setup 6
 - Before You Begin 6
 - Maconomy Setup in MConfig 8
 - Set Up Country and State Mapping 8
 - Set Up TLS Protocol 9
- Routine Procedures 10
 - Import New Hires 10
 - Update Maconomy from Talent Management 10
 - Link Existing Maconomy Employee to Existing Talent Management User 10
 - Changing Background Job User 11
 - Remapping of Country and State 11
- Common Errors 12

Overview

This document details the integration between Talent Management and Maconomy. This integration enables Maconomy customers to use Talent Management to manage recruitment and other HR processes while utilizing Maconomy for their ERP solution.

There is no requirement to be live on either Maconomy or Talent Management first. The flexible solution allows for existing customer of either system to integrate simultaneously.

This document is divided into three main sections:

- **Setup**, which includes setup on both systems as well as the initial integration
- **Routine Procedures**, such as syncing employees
- **Common Errors**

Workflows

This integration is one-way from Talent Management to Maconomy, and supports the synchronization of Talent Management *user* and Maconomy *employee* data.

Three workflows are supported:

1. Importing new hires from Talent Management to Maconomy. A new Maconomy employee is created for each imported new hire.
2. Updating Maconomy employees who are already linked with Talent Management.
3. Linking an existing Maconomy employee to an existing Talent Management user.

Additionally, you can choose to synchronization manually as well as on a scheduled basis.



Validation

Note that the integration is one-way from Talent Management to Maconomy. The majority of validation corrections will need to be made in Maconomy, and only in rare circumstances in Talent Management.

Field Mapping

The table below shows field mappings between the Talent Management user and the Maconomy employee. Mapping procedures are detailed in the [Maconomy Setup](#) section.

Talent Management Field	Maps to Maconomy Field	Notes
User ID	Talent Management User ID	

Talent Management Field	Maps to Maconomy Field	Notes
Employee ID	Employee No.	The employee ID in Talent Management is assigned to the Employee Number of Maconomy. Note: The integration is one way, mapping from Talent Management to Maconomy, except in the initial instance where Maconomy populates the Talent Management user with the related Maconomy Employee ID.
First Name + Middle Name + Last Name	Name 1	The name is constructed by appending the first, middle and last name (with spaces in between).
E-mail	E-mail	
Address One	Name 2	
Address Two	Name 3	
Address Three	Name 4	
City	Postal District	
Zip/Postal Code	Zip Code	
Country	Country / Name5	See Maconomy Setup for details on mapping countries.
ST/PR	Country / Name5	See Maconomy Setup for details on mapping countries.
Primary Phone	Phone	
Hire Date	Date Employed	
Date of Birth	Date of Birth	
Job Title	Position	
Manager	Supervisor, No.	The manager user must be linked to a Maconomy employee to map this field.
Separation Date	Termination Date	

Talent Management Field	Maps to Maconomy Field	Notes
<p>Organization Code of the top level organization of user's organization</p> <p><i>See User Org Level field warning below.</i></p>	<p>Company No.</p>	<p>Use the Organization Code of the top level organization referenced from a user's organization in Talent Management to indicate the corresponding Maconomy Company Number.</p>
<div style="border: 1px solid black; padding: 10px;">  <p>User Org Level Field Warning</p> <p>It is imperative that the User's Org Level field in Talent Management is accurate, as this Org Level becomes the Company Number of the new Employee in Maconomy.</p> <p>Note that when a new hire is imported on initial integration, the organization level is taken from the company of the job requisition, not from what (may be) stated on the user at that time.</p> <p>On subsequent integrations, Maconomy does reference the org-level of the user, so this field must be set to the org-level of the company of the job requisition. If at some point in time the user changes into another part of the organization, update that org-level to reflect whatever company this matches in Maconomy</p> <p>If no Org Level is specified for User's Org Level in Talent Management, Maconomy defaults to "standard company" from the system parameter setup in Maconomy. The Company Number of the new Employee can be updated manually later, but the employee number of that employee is taken from the Number Series of the initial company.</p> <p>Ensuring the correct information initially on the job requisition, and then choosing the correct User Org Level in Talent Management ensures good data in Maconomy</p> </div>		

Talent Management Setup

To enable the Maconomy integration from within Talent Management, you need to perform system setup, as described below.

Before You Begin

Before you begin the Talent Management integration with Maconomy, contact Talent Management Support to obtain the following:

- User name and password to access middleware site
- URL to middleware site
- FTP site and related information
- “Token” (password) to enable the integration
- Ensure accurate user org level on the job requisition



It is imperative that the User's Org Level in Talent Management is accurate prior to integration and going forward, as this Org Level becomes the Company Number of the new Employee in Maconomy. See *User Org Level field warning in the previous section.*

Integration Setup

To enable the integration from the Talent Management side, you must log in to a middleware support site, gain access to and complete an integration setup screen, and submit your information.

To enable the Talent Management portion of the integration, complete the following steps:

1. In your web browser, enter the middleware URL. It is in a format similar to the link below:
<https://clientname.hrsmart.com/tools>
A middleware site displays.
2. Log in with your user credentials.
3. Click **Special Integration > Maconomy Integration**. An integration setup screen displays.
4. Enter information in the following fields:
 - Client Name
 - Client Existing Token
 - Client URL
 - Client FTP Host
 - Client FTP Username
 - Client FTP Password
 - Client FTP Port
 - Client FTP Type
 - Client FTP Subdirectory

5. In the **Client Notification List** field, enter the email addresses (comma separated) of users who should receive the reports that are generated each time the integration runs, including error reports.
6. Click **Deploy**. The integration is now enabled on the Talent Management side.

Maconomy Setup

To enable the integration with Talent Management, you must perform specific setup in Maconomy, including:

- Follow steps in Before you Begin
- Maconomy setup in MConfig
- Set up country mapping and state mapping
- Set up Talent Management integration

Before You Begin

Before you begin Talent Management integration setup in Maconomy, you must do the following:

- Enable system parameter(s)
- Enable access control

Additionally, to schedule automatic synchronization, you must also set up background integration:

- Background integration setup (monitors)
 - Set up a “background user”
 - Set up REST services

Enable System Parameters

To enable Talent Management integration and functionality with system parameters, complete the following steps.

1. Click **Setup » System Setup » Parameters and Numbers » System Parameters.**
2. Search for **Enable Deltek Talent Management Integration**, and enable the field.
Selecting this parameter enables Talent Management in Workspace Client for the selected company.
3. Search for **Block Employee Off-boarded in Deltek Talent Management**, and enable the field, if needed.
If this parameter is selected and the user is off-boarded in Deltek Talent Management (such as if the user has left the company), then the linked employee is blocked in Maconomy.

Enable Access Control

Enable access control to integration users so that they can use Talent Management-related synchronization actions.

To enable access control, complete the following steps:

1. Click **Setup » Users » Actions.**
2. In the Permitted Misc. Action island, select the **Synchronize Talent Management Users with Employees** check box to allow the user to use synchronization actions.



Note that the access granted in step 2 has no bearing for background job user on the action “**Sync All Empl. with Talent Management.**”

Background Integration Setup

If you choose to schedule automatic synchronization, you must also set up background integration. (If you use manual synchronization, skip this section and check [Routine Synchronization](#)).

Set Up a Background User

To enable scheduled, automatic integrations, you must set up a “background user” which will be used exclusively to enable the integration. This background user is used for monitors to run synchronization.

To set up a background user, complete the following steps:

1. Click **Setup » Talent Management Setup » Administration**.
2. Click the **Set Background Job User** action. A wizard opens. Enter user name and password information, and click **Set Background Job User**.
3. Click **Single Dialogs » Set-Up » Access Control » Actions**. In the Actions tab, Permitted Misc. Actions island, select the **Synchronize Talent-Management Users with Employees** check box. This gives the user the access to **Sync. All Empl. with Talent Management** and **Import New Hires from Talent Management** actions.

Set Up REST Services

To set up REST services for the Talent Management / Maconomy integration, you must gather a REST URL, put it into Maconomy, and then install and start monitors via a command line.

To set up REST Services, complete the following steps:

1. Locate the REST URL in Maconomy index.html (where all Maconomy client links are placed). Find the “Handshake URL” link and Shortname.
2. Copy the Handshake URL and reconfigure it to a REST URL, as follows:
 - Replace *handshake* with *containers*
 - Replace *1* with *v1*
 - Append the short name

Example:

Handshake URL: <http://100.10.10.10:24444/handshake/1/>

Shortname **w170** (w170):

Result: <http://100.10.10.10:24444/containers/v1/w170>

3. Click **Setup » Talent-Management Setup » Administration**.
4. In the REST Service URL, enter a Maconomy RESTful service URL to be used by monitors that run synchronization on a scheduled basis.
5. A running interval for each monitor will have to be provided in the setup.
6. Once the setup data is entered the monitors can be installed and started. That can be done either in monitors dialog or with command line.

7. Install the SynchronizeHRSmartUsers monitor, which synchronizes employees with users, and install ImportDTMUsers monitor which imports newly hired users.

Maconomy Setup in MConfig

Maconomy requires a gateway URL and token to Talent Management. The URL and token are entered in MConfig.

To enter the URL and token in MConfig, complete the following steps:

1. Select **Application** overview and locate Deltek Talent Management integration island.
2. In the **Gateway URL** field, enter:
<https://soa.hrsmart.com/gateway.php>
3. In the **Token** field, enter the authentication token, which is similar to the format below, while unique to each customer / system.

123ASDF23ASDF5SDF23SDF56SDF



For more information, see the document posted at the link below.

<https://docs.soa.hrsmart.com/main.php>

Set Up Country and State Mapping

The Maconomy employee uses **Country** and **Name 5** fields for country and the state mapping. A Talent Management Country ID must map to **Country** and / or **Name 5** fields.

Once you create the country mapping, you can create the state mapping, if needed. Enter a Talent Management State ID and map to **Country** and / or **Name 5**.



The **Country** field can represent a country or a state, and the **Name 5** field can represent a country or a state.

The fields mapped from Deltek Talent Management to Maconomy are closed on employee. Thus the only way to update them is through Talent Management.

See the *Deltek Maconomy 2.2.x Enhancements Guide* for details on Country Mapping concepts.

To map countries between Talent Management and Maconomy, complete the following steps:

1. Click **Setup » Talent-Management Setup » Country Mappings** to set up Talent Management countries.
2. In the Talent-Management Country tab, **Talent Mgmt. Country** field, select the country from Talent Management and map to Maconomy country.
3. In Talent Management States sub-tab, in the **State Id., Talent Management** field, select the identification code of the state from Talent Management and map to Maconomy state.

Set Up TLS Protocol

When you use Maconomy 2.2.x with later versions of Talent Management integration, you need to set the Maconomy coupling service to use a newer TLS protocol

To set up the TLS protocol:

1. Locate the following files:
 - <Path to Maconomy installation>/CouplingService/CouplingService.ini
 - <Path to Maconomy installation>/CouplingService/servicewrapper/conf/wrapper.equinox.conf
2. Add the following line to both files:
`--Dhttps.protocols=TLSv1.1,TLSv1.2`
3. Close to save the changes to the files.
4. Restart the Coupling Service.

The integration will now use the TLS protocols that you entered.

Routine Procedures

During routine synchronizations, you must perform the standard Talent Management to Maconomy synchronization, then identify and correct errors.

Import New Hires

Import all new hires from Talent Management to Maconomy. For each new hire (user, in Talent Management), an Employee is created in Maconomy, and personal data is copied to this Maconomy employee. The users are marked as exported in Talent Management. Every Talent Management user will be updated with the linked Maconomy Employee ID number. The import derives information such as employee name, country, and company, listed in [Field Mapping](#).



The integration is one way, except in this initial instance where Maconomy populates the Talent Management user with the related Maconomy Employee ID.

To import new hires, complete the following step:

1. Click **Setup » Talent Management Setup** and select the **Import New Hires from Talent Management** action.

Update Maconomy from Talent Management

You can manually synchronize Talent Management user data with already-linked Maconomy employees. Any changes to users in Talent Management are copied to Maconomy employees.

You can do this action for a single employee or for all employees.

Update All Employees

To update all employees, complete the following step:

1. Click **Setup » Talent Management Setup » Administration** and select the **Sync All Empl. with Talent Management** action.

Update Single Employee

To update a single employee, complete the following step:

1. Click **Human Resources » Employees » Employees** and select the **Sync. with Talent Management** action.

Link Existing Maconomy Employee to Existing Talent Management User

You can link an existing Maconomy employee to an existing Talent Management user. A Talent Management User ID should be entered on the Maconomy employee. After, Maconomy collects Talent Management user data and updates the existing Maconomy employee accordingly.

To link an existing Maconomy user with an existing Talent Management user, complete the following steps:

1. Click **Human Resources » Employees » Employees**.
2. In the Talent Management island, enter that user ID in the **User ID** field.

Changing Background Job User

To change the background job user, complete the following steps:

1. Click **Setup » Talent Management Setup » Setup** and select the **Remove Background Job User** action.
2. From the same workspace, select the **Set Background Job User** action. A dialog displays.
3. Complete the username and password fields, then click **Set Background Job User**.

Remapping of Country and State

Countries and states can be remapped as needed. If an existing country entry changes, then existing mappings should be updated. The remapping does not affect the employees instantly, as the remapped countries or states are updated on the employee when the employee is updated with the latest Talent Management user changes.



Notice that the mapping of the countries and states are not updated if a country or a state name is changed in Talent Management. A responsible user of Maconomy must update the country mappings in Maconomy to reflect the country and the state changes in Talent Management.

To remap countries and / or states, complete the following step.

1. Click **Setup » Talent Management Setup » Talent Management Country** and select the actions to add, update, or delete a Talent Management Country and / or State as needed.
2. Follow the steps in [Set Up Country and State Mapping](#) to remap countries and states.

Common Errors

Multiple Emails

Error: One user / employee has two associated email addresses (one in Talent Management, and a different one in Maconomy).

Resolution: Review email addresses in both systems and determine which is the correct address. After, go into the system with the erroneous second address and delete it.

Required Column Is Not Present in the File

Error: The file is missing a required column and the integration cannot work without it.

Resolution: Review the data sent to Talent Management and make sure all columns specified as required were sent in the file / data stream.

Invalid Data in Optional field

Error: The data expected in one of the fields did not match its intended format. Most common issues are with Date formats (format should be yyyy-mm-dd (4 digits year **dash** 2 digits month **dash** 2 digits day.)

Resolution: Review the field and its data and make sure that the format is correct.

Column is Present in the File But Was Not Expected

Error: The file was being parsed and the system detected a column that does not belong to the required or optional list (the import does not understand that column). This could be because of a typo or the vendor's / client's specific file generator system. This will **not** affect anything, the data in that column will be **totally** ignored.

Resolution: Review the file headers and make sure they are correct. Make sure there are no typos in the name of the column.



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

deltek.com