Deltek Maconomy® 2.5

Integration with Deltek Talent Management

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Contents

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 the following sections:

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

Technical Considerations

The integration between Maconomy and Talent Management communicates via HTTPS over port 443. If your instance of Talent Management and/or Maconomy is hosted in the Deltek cloud, you do not need to make any changes to your system to support the integration. However, if either Deltek CRM or Maconomy is deployed on-premise with the other product hosted in the Deltek cloud, you must ensure that your on-premise application server for either product has port 443 open to the internet so that it can properly communicate with the cloud-based application server.

In addition, if your network security infrastructure employs any URL-based traffic filtering you must configure that filter to allow all traffic from/to the URL used to access the cloud-based product.

If both Talent Management and Maconomy are deployed on-premise, you must only ensure that port 443 is open between both application servers via your internal network and that you are not filtering the URL used to access either application.

Workflow

The bidirectional integration supports a single point data entry solution, where Maconomy sends employee update to the Talent Management user after the Talent Management user is imported to Maconomy. The integration supports the synchronization of Talent Management *user* and Maconomy *employee* data.

This enables Human Resources users to use one system for updating data. Since Maconomy can capture more data on employees than Talent Manager can, Maconomy stores the master data.

Step 1: • Create a user in Talent Management.

Step 2: • On-board a user in Talent Management.

Step 3: • The onboarded user is synchronized with Maconomy and a Maconomy employee is created.

Step 4: • Update employee data in Maconomy. The changes are sent back to Talent Management for the integrated fields.
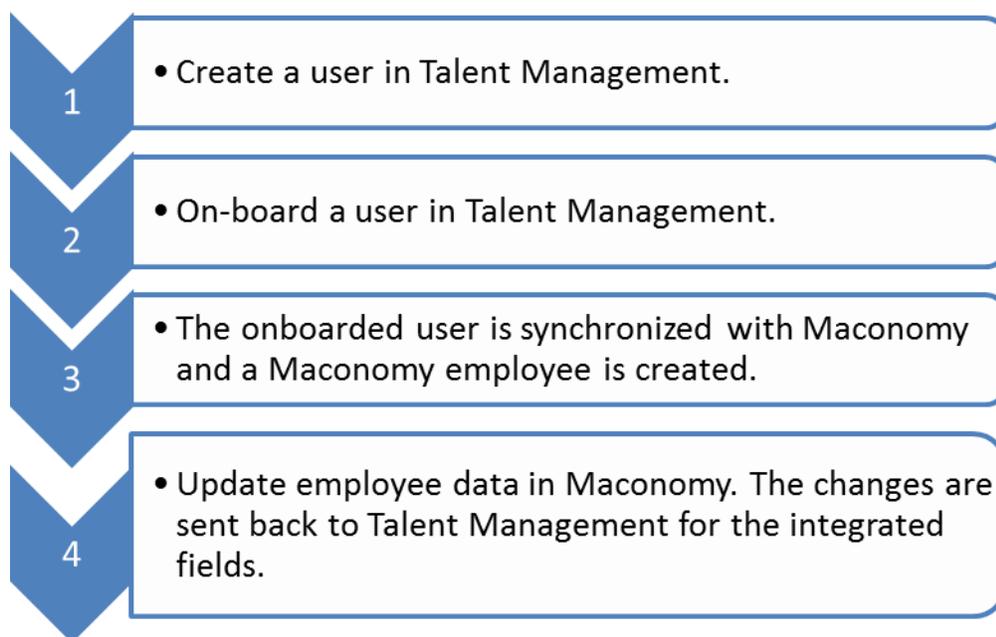
Field Mapping

The table below shows field mappings between the Talent Management user and the Maconomy employee. The general rule is that all fields are copied from Talent Management to Maconomy when importing new hires. After that, all fields are copied from Maconomy to Talent Management when synchronizing the data. Refer to the Notes column for the exceptions.

Country and State mapping procedures are detailed in the Maconomy Setup section.

> **Note:** For a list of fields NOT included in the synchronization, see Appendix A.

Talent Management Field	Maps to Maconomy Field	Notes
User ID	Talent Management User ID	Entered upon employee creation.
Employee ID	Employee No.	The employee ID in Talent Management is assigned to the Employee Number of Maconomy.
First Name	Formal First Name	Only synchronized on import of new hires. Any later updates of this field are not synchronized.
Middle Name	Formal Middle Name	Only synchronized on import of new hires. Any later updates of this field are not synchronized.

Talent Management Field	Maps to Maconomy Field	Notes
Last Name	Formal Last Name	Only synchronized on import of new hires. Any later updates of this field are not synchronized.
First Name	Preferred First Name	This field is copied from Maconomy to Talent Management on employee synchronization.
Middle Name	Preferred Middle Name	After initial creation, updates to this field are synchronized to Talent Management.
Last Name	Preferred Last Name	After initial creation, updates to this field are synchronized to Talent Management.
SSN	Soc. Security No.	Always copied from Talent Management to Maconomy. Closed in Maconomy. A Talent Management user can have many Social Security Nos. (SSN), such as a number per country. In Maconomy, an employee can have only one SSN. Therefore, the number is derived by employee's country. For example, if an employee is in country A, then the SSN of country A is retrieved from Talent Management and copied to the Maconomy employee. If the Talent Management user does not have an SSN of country A, then SSN is left empty in Maconomy. Whenever a country is updated in Maconomy, the SSN is updated to correspond with the updated country.
E-mail	Personal Email Address	Upon importing new hires, E-mail is copied from Talent Management into the Maconomy Personal E-mail field. After this, the field cannot be empty. When updates are propagated from Maconomy employee to Talent Management user, E-mail is updated as follows: - If E-mail contains data, it is copied to the Talent Management user. - If E-mail is empty, the Personal E-mail is copied to the Talent Management user. E-mail and Personal E-mail have validation against invalid addresses.
E-mail	E-mail	See Notes on Email.
Address One	Name 2	

Talent Management Field	Maps to Maconomy Field	Notes
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	Copied from Talent Management to Maconomy upon new hire import. After that, any data synchronization copies the phone number from Maconomy to Talent Management. Maconomy copies the phone number to the primary phone.
		If the primary phone does not exist, then Maconomy creates a primary phone in Talent Management. If a non-primary phone exists in Talent Management with the same number, then Maconomy sets this phone to primary.
		Deleting a phone number in Maconomy employee deletes the primary phone from Talent Management.
Hire Date	Date Employed	Validation is done when the employee is linked with Talent Management user. Once this field has a value, it cannot be empty.
		If updated in Maconomy, the value is sent back to Talent as "Original Date of Hire".
Date of Birth	Date of Birth	Validation is done when the employee is linked with Talent Management user. Once this field has a value, it cannot be empty.
Job Title	Position	Always copied from Talent Management to Maconomy. Closed in Maconomy.
Manager	Supervisor, No.	The manager user must be linked to a Maconomy employee to map this field.
Separation Date	Termination Date	Always copied from Talent Management to Maconomy. Closed in Maconomy.

Talent Management Field	Maps to Maconomy Field	Notes
Organization Code of the top level organization of user's organization *See User Org Level field warning below.*	Company No.	For the top-level organization unit in Deltek Talent Management, use the Maconomy Company Number in the reporting structure table to indicate the corresponding Organization Code in Talent Management. By utilizing the tree structure functionality in the Reporting Structures workspace, you can now select top, intermediate, and bottom organizational levels. The Maconomy company will serve as the top level, whereas an Entity dimension will reflect the executing department at the bottom. As for intermediate levels, you can select any value. In addition, you can push the organizational structure and any subsequent changes from Maconomy to Talent Management. Likewise you have the option to apply the structure to new hires and vice versa.When importing newly hired Talent Management users, the employee is assigned a company and an executing department (derived from the Entity dimension) from the organizational level in Talent Management. Any changes to the organizational hierarchy is reflected on the Talent Management user by pushing the data from Maconomy to Talent Management. Any changes to the Maconomy employee organizational affiliation (such as company and department) is reflected in Talent Management.
Maconomy Company No.	Company No.	Never copied from Maconomy to Talent Management.

Talent Management Field	Maps to Maconomy Field	Notes
Warning: User Org Level and Maconomy Company No. Fields Warning The integration must be setup to use the Maconomy company number. **Maconomy Company No:** You can now create and maintain a multi-level organizational structure in Maconomy, and to obtain and apply the hierarchy to new hires in Talent Management. This field is created in Maconomy using the Reporting Structure functionality, and is used to create an Org Level for the user in Talent Management. If this is modified in Maconomy, the changes are also pushed to Talent Management. When a new hire is imported on initial integration, the organization level is taken from the organizational hierarchy created and maintained in Maconomy. This may include multiple levels, but always includes the executing department (derived from the Entity dimension) and the company (derived from the Maconomy Company Number). Reporting structures of the Entity type are used to create and maintain the organizational hierarchy. To facilitate this synchronization, the Reporting Structure Name field and Export Organizational Structure action are available in the Talent Management Setup workspace. The former allows you to select an existing reporting structure in Maconomy while the latter creates a background task that exports the selected organizational structure to Talent Management. With this integration you can set up and maintain your organizational structure primarily in Maconomy.		

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 (RNT ticket to DTMCloud@deltek.com) 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

- Prepare one of the company fields setup

   o Ensure accurate user org level on the job requisition

   o Create a custom Maconomy Company Number field in user onboarding form

   > **Warning:** 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.*

- Ensure the **Country** field is specified for the Talent Management user.

> **Warning:** When uploading users for the first time, ensure that the **Country** field is specified as Maconomy requires the **Country** when synchronizing with Talent Management. In addition, be careful not to change translations for the country name, as this field is used in searching IDs when creating or updating users.

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
- Provide Talent Management custom **Maconomy Company No.** field name, if this field is used in Talent Management to specify a Maconomy country.
- Create skill level list

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

- Setup background integration to synchronize data

Enable System Parameters

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

1. Go to **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 **Enable Deltek Talent Management Skills Integration**, and enable the field.

   Selecting this parameter enables Talent Management Skills Integration.

4. 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.

5. Search for **Use both formal and preferred name on employees and contact persons** and **Use first/middle/last names on employees and contact persons**, and enable the fields.

   Selecting these parameters enables the use of separate fields for employee and contact names.

Add "DeltekTalentManagement" to Popup field

The popup type IntegrationType must have the value "**DeltekTalentManagement**" in order for Maconomy Skills integration to work with Deltek Talent Management.

To add the value in the Workspace Client:

1. Go to either **Single Dialogs » Set-Up » Set-Up » Popup Fields** or **Setup » System Setup » Parameters and Numbers » Popup Fields**.

2. Search for **Integration Type** and add the value "DeltekTalentManagement".

Create Skill Level List

To create a level list:

1. Go to **Human Resources » Employees » Setup » Level Lists**.

2. Click the **New Level List** button. The Create Level List dialog box displays.

3. In the Name field, enter **Talent Management**.

4. In the Description field, enter **Manually created**.

5. From the Grading Method drop-down list, select **Best Last**.

6. Click **Create**.

7. Select the **Talent Management** level list.

8. In the Levels panel, double-click and enter the exact same values from the level list in your Talent system.

Setup Background Integration

If you choose to schedule automatic synchronization, you must activate default background tasks. (If you use manual synchronization, skip this section and check Routine Synchronization).

Activate Default Background Tasks

To activate default background tasks:

1. Go to **Background Tasks » Setup » List of Schedule Rules**.

2. Find two default task generators *ImportDtmNewHires* and *SyncEmployeesWithDtmUsers*. Setup a trigger time pattern and activate these generators.

    -   **ImportDtmNewHires** generator creates tasks to import new hires from Talent Management.

    -   **SyncEmployeesWithDtmUsers** generator creates tasks to synchronize Talent Management users with linked Maconomy employees.

    > **Tip:** Read more about patterns in Pattern syntax help.

Import Skill Types and Skills

You can import skill categories and skills from Talent Management to Maconomy. You must trigger each action to create background tasks and initiate synchronization. Skill types are required by skills. Skill types must be imported first from Talent Management before importing skills.

To import skill types and skills:

1. Go to **Setup » Talent Management Setup » Administration**.

2. Activate each of the following actions to initiate synchronization:

   - **Import Skill Types from Talent Management** – use this action to import skill types from Talent Management to Maconomy, and create a background task to add, update, or select a skill type as deleted when removed from Talent Management.

   - **Import Skills from Talent Management** – use this action to import skills from DTM, and create a background task to add, update, or remove skills in Maconomy. You must use this action only after skill types have been imported from DTM.

   > **Note:** Handling Skills in Maconomy
   >
   > Talent Management is the master of skills data and any skills information imported to Maconomy. The integration overwrites any changes directly made in Maconomy.
   >
   > - You cannot create, update, nor delete skills for employees linked to Talent Management.
   > - You cannot update or delete skills (in Setup) imported from Talent Management.
   > - A user gets a notification when trying to change or delete a skill type linked to Talent Management skill categories.
   >
   > Skills and employees that are not linked to Talent Management can be amended in Maconomy.

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://soadev-us.tm.deltek.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

   > **Note:** For more information, see the document posted at https://soadev-us.tm.deltek.com/gateway.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**.

Country Mapping Concepts

Maconomy has an open list of countries which you can add to at any time. For CPA and PSO solutions, this list may also contain the states of the countries. Talent Management has two lists: one for countries and the other for states. The states and the countries must be mapped to synchronize the Talent Management user with Maconomy employee.

Maconomy Country Derivation

Maconomy derives a country when synchronizing Talent Management users with Maconomy employees. By default it will use Country value if it is not empty and Name 5 value even if it is empty from country mapping (card pane).

If a state mapping also exists, then it will use Country value if it is not empty and Name 5 value if it is not empty from state mapping (table pane).

If the match is not found the synchronization will fail, because the country is a mandatory field on Maconomy employee.

Creation of Country Mappings

The Maconomy employee uses two fields for the country and the state: **Country** and **Name 5** fields.

> **Note:** 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 Talent Management to Maconomy are closed on employee. And the only way to update them is through Talent Management.
>
> See the *Deltek Maconomy 2.3.x Enhancements Guide* for details on Country Mapping concepts.

A Talent Management Country ID must be entered and must map to either Maconomy **Country** or Maconomy **Name 5** or to both fields. Once the country mapping is created, the state mappings for this country can be created. A Deltek Talent Management state ID must be entered. It must map to either Maconomy **Country** or Maconomy **Name 5** or to both fields.

When you create a country mapping, Maconomy then imports related states automatically from Talent Management, loading all states for the current country. If the Talent Management country is mapped to a Maconomy **Country**, then Maconomy does not only create the state lines in the table, but it copies the Talent Management state name to Maconomy **Name 5** field as the suggested mapping.

> **Note:** The fields mapped from Talent Management to Maconomy will be closed on employee. Thus the only way to update them will be in Talent Management.

Country Mapping Procedures

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.

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.

> **Note:**
>
> - The "New Hires" import is one way, except in this initial instance where Maconomy populates the Talent Management user with the related Maconomy Employee ID.
>
> - Employee Country derivation is still the same as in the previous Maconomy version.
>
> - Off-boarded user synchronization is not changed.

To import new hires, complete the following step:

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

Update Talent Management from Maconomy

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

> **Note:** The integration is bidirectional, but each field has only one direction updates. Most fields are always copied from Maconomy to Talent Management and other fields (very few) are always copied from Talent Management to Maconomy. The list of fields is fixed and the direction never changes.

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. Go to **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. Go to **Human Resources » Employees » Employees** and select the **Sync. with Talent Management** action.

> **Note:**
>
> - When any linked field is updated on Maconomy employee, the updates are sent to the linked Talent Management user.
>
> - Synchronization can be scheduled or done manually.

Link Existing Maconomy Employee to Existing Talent Management User

You can link an existing Maconomy employee to an existing Talent Management user. Enter a Talent Management User ID on the Maconomy employee. After, Maconomy updates Talent Management user with data from Maconomy employee and pulls data (such as the Social Security No., Position, and Termination Date) from the Talent Management user and updates the existing Maconomy employee accordingly.

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

1. Go to **Human Resources » Employees » Employees.**

2. In the Talent Management island, enter that user ID in the **User ID** field.

> **Note: Validation**
>
> Integration is bidirectional, but majority of validation corrections are made in Maconomy and only in rare instances in Talent Management.

Sync All Employee Skills

Use the **Sync All Employees. Skills with Talent Management** action to retrieve all employees' skills from DTM and synchronize them with Maconomy. You must trigger this action to create the background task and initiate synchronization.

To synchronize all employees' skills from DTM to Maconomy:

1. Go to **Setup » Talent Management Setup » Administration**.

2. Click **Sync All Employees Skills with Talent Management**.

> **Note:** The synchronization of employee skills is a separate function from the already existing Maconomy employee synchronization. The skills are not automatically synchronized when Maconomy pulls new hires from DTM nor when a single user is synchronized from DTM by **Sync with Talent Management**.

Import Employee Skills

You use the **Import Empl. Skills from Talent Management** action to retrieve the employee skills from DTM and synchronize them with Maconomy. You must trigger this action to create the background task and initiate synchronization.

To import an employee's skills from DTM to Maconomy:

1. Go to **Human Resources » Employees » Skills**.

2. Click the **Import Empl. Skills from Talent Management** action.

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.

> **Note:** 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. Go to **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.

Check Background Task Log

To check the background task log:

1. Go to **Setup » Background Tasks » Status » List of Background Tasks** and double-click the background task.

2. If the task's Execution Result is "Failed," open the Result Log to view the reason.

Check Log Files

The workflow of the integration is logged with Coupling Service logs. Logging for the Coupling Service is configured in the file logback.xml located in the folder:

<Path to Maconomy installation>/CouplingService/configuration

Field Descriptions

DTM Skill Category Mapping to Maconomy Skill Type

Deltek Talent Management	Maconomy	Description
skill_category_id	String 1	The DTM skill category ID, prefixed with "DTM." For example, when the skill_category_id is 5, the value is DTM 5.
skill_category_name	Name	
skill_category_last_modified	String 2	
	Boolean 1	When skill category is deleted in DTM, this field is set to true in Maconomy

DTM Skill Mapping to Maconomy Skill

Deltek Talent Management	Maconomy	Description
skill_id	Skill Number	The DTM skill ID, prefixed with "DTM." For example, when the skill _id is 1, then the value is DTM 1.
skill_name	Skill Name	
skill_category_id	Skill Type	This is used to find the mapped skill type in Maconomy and assign it to the skill.
	Level List	The integration uses the "Talent Management" level list and this level list is created manually in Maconomy.

DTM Skill Mapping to Maconomy Integration Line

Deltek Talent Management	Maconomy	Description
skill_id	String 1	
skill_last_modified	String 2	

DTM User Skill Mapping to Maconomy Employee Skill

Deltek Talent Management	Maconomy	Description
skill_id	Skill Number	Derived from Maconomy skill.
skill_category	Skill Type	Derived from Maconomy skill.
skill_name	Skill Name	Derived from Maconomy skill.
skill_level	Level	

DTM User Skill Mapping to Maconomy Integration Line

Deltek Talent Management	Maconomy	Description
skill_id	String 1	
skill_last_modified	String 2	
endorsed	String 3	
skill_usage	String 4	
skill_last_used	String 5	

Appendix A

Fields NOT Included in Synchronization

Appendix A includes Talent Management fields that are NOT included in the integration.

Field Name
user_phone
user_eeoc_race
user_eeoc_veteran
user_eeoc_disabled
user_eeoc_gender
referral_source_id
referral_source_name
user_new_hire_exported
manager_employee_id
manager_firstname
manager_lastname
manager_email
diversity_info
user_location_code
user_location_name
requisition_id
requisition_code
requisition_job_code
resume_id
candidate_id
candidate_hire_date

Field Name
candidate_start_date
offer_salary
offer_salary_type
offer_start_date
user_status
recruiter_id
recruiter_employee_id
recruiter_firstname
recruiter_lastname
recruiter_email
hiring_manager_id
hiring_manager_employee_id
hiring_manager_firstname
hiring_manager_lastname
hiring_manager_email
req_company_id
req_company_code
req_company_name
req_division_code
req_division_name
req_division_id
req_department_id
req_department_code
req_department_name
req_salary_grade

Field Name
req_location_code
req_location_name
dynamic_form_id
req_exemption
position_code
position_salary
position_location_code
job_code
job_location_code
job_location_name
job_type
job_salary_grade
user_login
jobseeker_hire_type_id
jobseeker_hire_type
jobseeker_hiring_reason_id
jobseeker_hiring_reason
requisition_position_type
requisition_job_type
custom_fields
taxable_entity_id
taxable_entity_name

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