

Deltek Costpoint

Costpoint Online Help

Costpoint - Talent Management Integration



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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 [Deltek 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 Deltek 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. 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 Deltek 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 – Deltek 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.