



Deltek

# Deltek Costpoint®

## 8.2

Import Pools to Burden  
Templates Preprocessor

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## Import Pools to Burden Templates

Use this screen to create a burden template that is used to bring existing cost pools from Projects into Costpoint Advanced Project Budgeting.

**Warning:** If you are using this screen in **Costpoint Planning**, click this [link](#) to access specific help information for using Import Pools to Burden Templates in Planning.

Use this screen when initializing Advanced Project Budgeting or any time before you revise your workplan budget.

You must run the Build Budget Composite Rates screen after you have imported the pool templates.

**Note:** The input file layout may contain fields that are available only in Costpoint Advanced. If you are using Costpoint Essentials, these fields are excluded from the import process and may be left blank or null when you create the input file.

### Display the Import Pools to Burden Templates Screen

You access the Import Pools to Burden Templates screen from the Projects or the Planning domain.

Take one of the following actions:

- Click **Projects » Advanced Project Budgeting » Burden Templates » Import Pools to Burden Templates**.
- Click **Planning » New Business Budgeting » Controls and Utilities » Import Pools to Burden Templates**.
- Click **Planning » Project Budgeting » Controls and Utilities » Import Pools to Burden Templates**.



### Contents of the Import Pools to Burden Templates Screen

Use the fields and options to configure the Import Pools to Burden Templates 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
<b>Parameter ID</b>	<p>Enter, or click  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 <b>Query</b>.</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>
<b>Description</b>	<p>Enter, or click  to select, a parameter description of up to 30 alphanumeric characters.</p>
<b>Template</b>	Enter this burden template.
<b>Description</b>	Enter a description of this burden template.



### Selection Ranges

Use these fields to select the allocation group, fiscal year, and period that you wish to use to set up your burden template. You can find this information on the Manage Cost Pools screen.

### Source Allocation Group



Field	Description
<b>Option</b>	This field always displays <b>One</b> .
<b>Start</b>	Enter, or click  to select, the source allocation group for the cost pool.

### Source Fiscal Year\Period

Field	Description
<b>Option</b>	This field always displays <b>One</b> .
<b>Start Fiscal Year</b>	Enter, or click  to select, the source fiscal year for the cost pool.
<b>Start Period</b>	Enter, or click  to select, the source fiscal period for the cost pool.



### Destination Fiscal Years

Use these fields to select the fiscal years to which you would like to copy the information.

Field	Description
<b>Option</b>	<p>Use this drop-down list to select the range of fiscal years that receive the cost pool. Valid options are:</p> <ul style="list-style-type: none"> <li>All</li> <li>One</li> <li>Range</li> <li>From Beginning</li> <li>To End</li> </ul> <p>The default for this field is <b>All</b>.</p>
<b>Start</b>	Enter, or click  to select, the first fiscal year that receives the cost pool.
<b>End</b>	Enter, or click  to select, the last fiscal year that receives the cost pool.

### Pools

Use these fields to select the pools you would like to use for your burden template.

Field	Description
<b>Option</b>	<p>Use this drop-down list to select the range of pools that are copied into the selected fiscal years. Valid options are:</p> <ul style="list-style-type: none"> <li>All</li> <li>One</li> <li>Range</li> <li>From Beginning</li> <li>To End</li> </ul> <p>The default for this field is <b>All</b>.</p>
<b>Start</b>	Enter, or click  to select, the first pool that is copied into the selected fiscal years.
<b>End</b>	Enter, or click  to select, the last pool that is copied into the selected fiscal years.

### Pool Rates to Copy

Use this group box to select the type of rates that you would like to use in your templates. You can find the rates on the Pool Rates subtask of the Manage Cost Pools screen.

Field	Description
<b>None</b>	Select this option to copy none of the selected pools or allocation groups into the burden template. Select this option if you plan to use a predetermined budgeted rate.

Field	Description
<b>Provisional</b>	Select this option to copy only the provisional pool rates into the burden template for the pool selected.
<b>Actual</b>	Select this option to copy only the actual pool rates for the fiscal year and period chosen.
<b>Target</b>	Select this option to copy only the target pool rates for the fiscal year and period chosen.
<b>Overwrite Existing Template</b>	Select this check box to overwrite the existing template on the Manage Burden Templates screen using your selections.

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