


Deltek Costpoint®

Version 7.1.1 Preprocessor

An abstract graphic composed of several overlapping, semi-transparent blue polygons. The shapes are arranged to create a sense of depth and movement, with some areas appearing more saturated than others. The overall effect is a modern, geometric design that occupies the lower half of the page.

June 30, 2016

A blue geometric graphic consisting of several overlapping triangles and polygons, located in the top-left corner of the page.

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Import Pools to Burden Templates

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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. Use it 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.

[Location](#)


- Projects
- Advanced Project Budgeting
- Burden Templates

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 are also included in the saved parameter ID if there are any. You can change any of the associated selection defaults as necessary.

Parameter ID

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 in the screen, such as PERIOD or QUARTERLY.

When you save your record, all the selections made in the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query.

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 in the screen, you can override the defaults.

Description

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

Template

Enter this burden template.

Description

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

Option

This field always displays **One**.

Start


Enter, or click  to select, the source allocation group for the cost pool.

Source Fiscal Year\Period


Option

This field always displays **One**.

Start Fiscal Year

Enter, or click  to select, the source fiscal year for the cost pool.

Start Period

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.

Option

Use this drop-down list to select the range of fiscal years that receive the cost pool. Valid options are:


- ☒ All
- ☐ One
- ☐ Range
- ☐ From Beginning
- ☐ To End

The default for this field is **All**.

Start

Enter, or click  to select, the first fiscal year that receives the cost pool.

End

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.


Option

Use this drop-down list to select the range of pools that are copied into the selected fiscal years. Valid options are:


- ☒ All
- ☐ One
- ☐ Range
- ☐ From Beginning
- ☐ To End

The default for this field is **All**.

Start

Enter, or click  to select, the first pool that is copied into the selected fiscal years.

End

Enter, or click  to select, the last pool that is copied into the selected fiscal years.

Options**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.

Import Pools to Burden Templates

None

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.

Provisional

Select this option to copy only the provisional pool rates into the burden template for the pool selected.

Actual

Select this option to copy only the actual pool rates for the fiscal year and period chosen.

Target

Select this option to copy only the target pool rates for the fiscal year and period chosen.

Overwrite Existing Template

Select this check box to overwrite the existing template on the Manage Burden Templates screen using your selections.