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Deltek

# Deltek Costpoint Cloud

Transfer Tool User Guide

**September 3, 2019**

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## Overview

Use the instructions in this guide for uploading your Costpoint database to Deltek Cloud Operations through the Deltek Costpoint Cloud Transfer Tool. This guide also contains instructions for using the tool to encrypt and upload your Costpoint password to Deltek Cloud Operations.

# Using the Deltek Cloud Transfer Tool

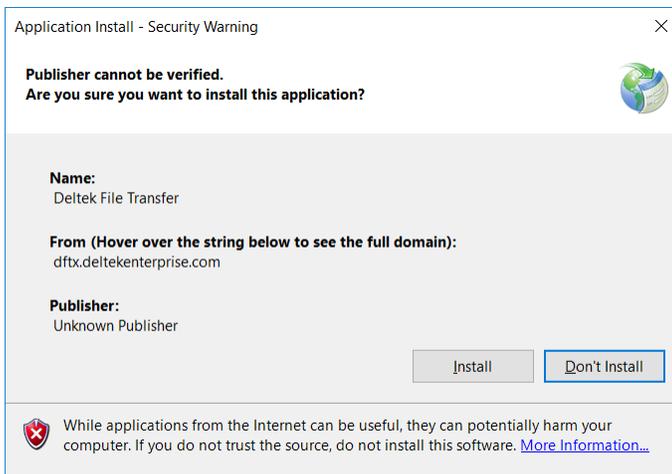
## Upload Your Database to Deltek

To upload your database to Deltek using the Deltek Cloud Transfer Tool:

1. From Internet Explorer, go to <https://dftx.deltekenterprise.com/>.

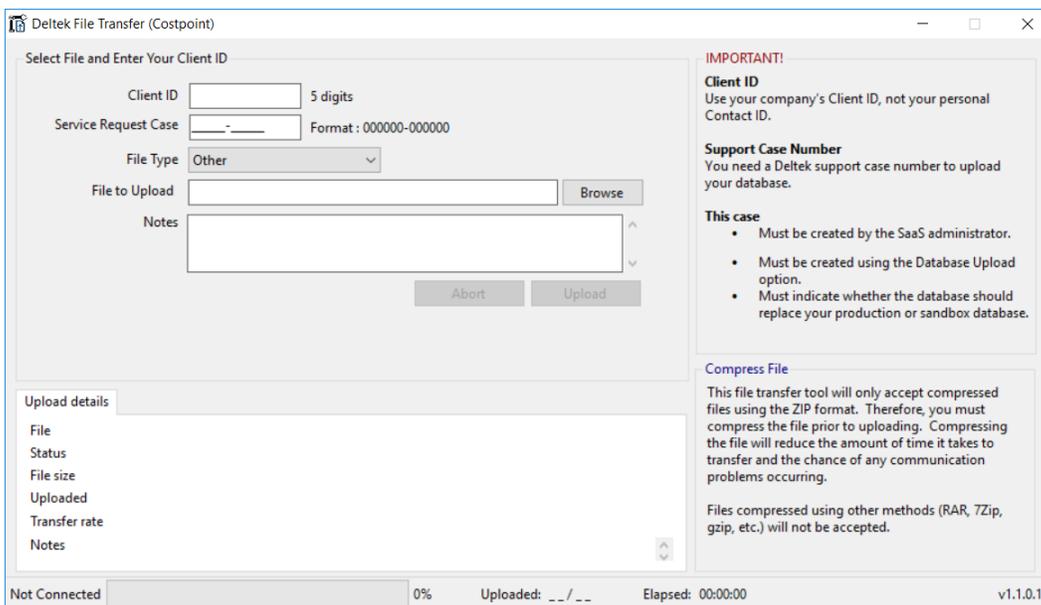
**Warning:** Microsoft .NET Framework 3.5 SP1 must be installed on the workstation from which the database is being uploaded.

The first time you use the tool, a dialog box displays.



2. Click **Install**.

When the installation completes, a dialog box displays.



- Complete the fields in the dialog box.

Field	Description
<b>Client ID</b>	Enter your 5-digit client ID. Be sure to use your company's <b>Client ID</b> , not your Contact ID. If you do not know your company's <b>Client ID</b> , ask your SaaS administrator.
<b>Service Request Case</b>	This value will be appended to the file name on the server (along with the client ID).
<b>File Type</b>	Select a file type from the drop-down list.  If you select <b>GCS Data Set</b> , the file transfer tool will upload the file to the GCS file repository, rather than the primary Costpoint file repository.
<b>File to Upload</b>	Click <b>Browse</b> and select the database backup file to upload. Use the following guidelines: <ul style="list-style-type: none"> <li>All database <b>backup files (.BAK)</b> must be compressed as a <b>ZIP</b> file prior to being uploaded. The file transfer tool will only select ZIP files to upload.</li> <li>Include the word <b>LIVE</b> or <b>TEST</b> in the file name, so that Deltek Cloud Operations understands the type of database being uploaded.</li> <li>If you upload a file that has the same <b>Client ID</b>, <b>File Type</b>, and <b>file name</b> as an existing file, the transfer process will overwrite the old file.</li> </ul>
<b>Notes</b>	The information that you enter in this field is stored as clear text and will be visible to the person processing the file. Do <b>not</b> enter sensitive information in this field.

- Click **Upload**.

In the Upload Details tab, information about the file, file size, transfer rate, and upload time elapsed and remaining is displayed.

When the file transfer process completes, a message displays to confirm the transfer is completed.

## Encrypt and Upload Your Password

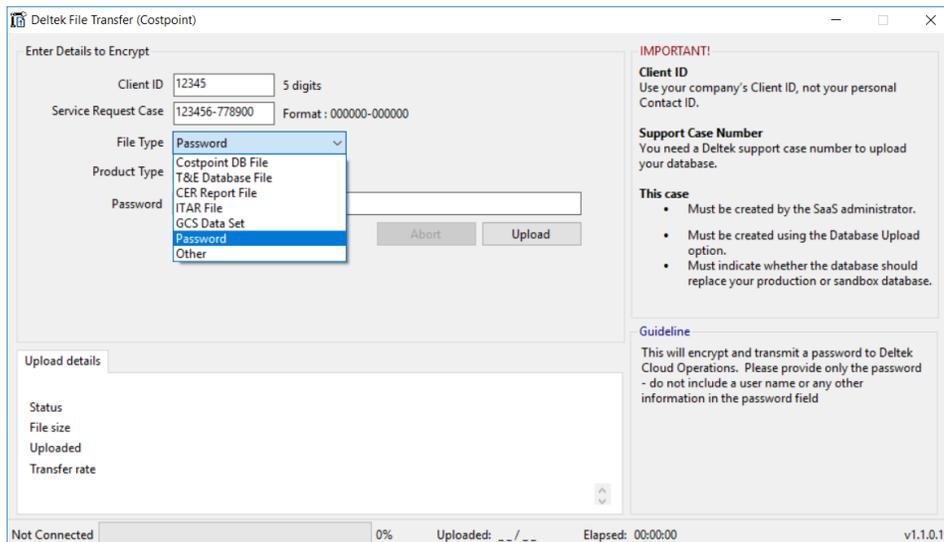
To encrypt and upload your Costpoint password using the Deltek Cloud Transfer Tool:

1. Launch the Deltek Cloud Transfer Tool.
2. Complete the fields in the dialog box.

Field	Description
<b>Client ID</b>	Enter your 5-digit client ID.
<b>Service Request Case</b>	Enter your 13-character service request number.

3. In the **File Type** list, select **Password**.

The **Product Type** field displays as well as side information for entering a password.



Field	Description
<b>Product Type</b>	<p>Select a product type from the drop-down list.</p> <ul style="list-style-type: none"> <li>▪ If you select <b>CMS</b>, <b>Cobra</b>, or <b>Gov Win CM</b>, the <b>User Password</b> field displays.</li> <li>▪ If you select <b>Gov Win IQ</b>, the <b>Tenant ID</b>, <b>User Password</b>, and <b>Client Secret</b> fields display.</li> <li>▪ If you select <b>Resource Planning</b>, the <b>Password</b> and <b>Secret</b> fields display.</li> <li>▪ If you select <b>Silkroad</b>, the <b>FTP User Password</b> and <b>Web Service User Password</b> fields display.</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>▪ If you select <b>Talent Management (DTM)</b>, the <b>Token</b> field displays.</li> <li>▪ If you select <b>Other</b>, the <b>Password</b> field displays.</li> </ul>
<b>Password/Secret/Token</b>	<p>Password fields are required for the selected product type.</p> <p>Enter <b>only</b> the password. Do not include a user name or any other information in these fields.</p>

4. Click **Upload**.

When the file transfer process completes, a message displays to confirm the encrypted file has been transferred to Deltek Cloud Operations.

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## About Deltek

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