




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

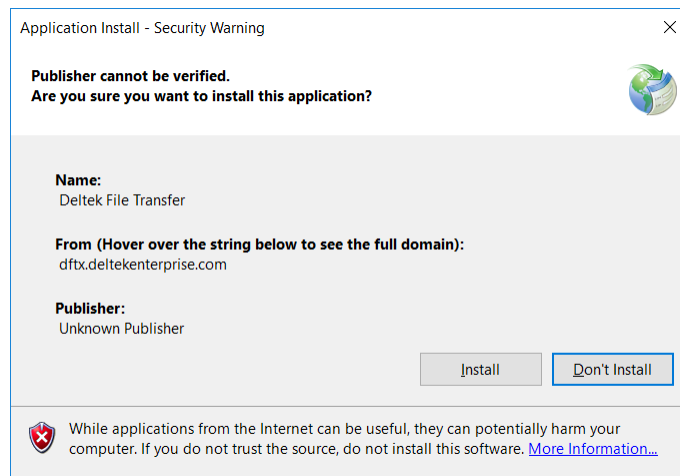
Upload Your Database to Deltek

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

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

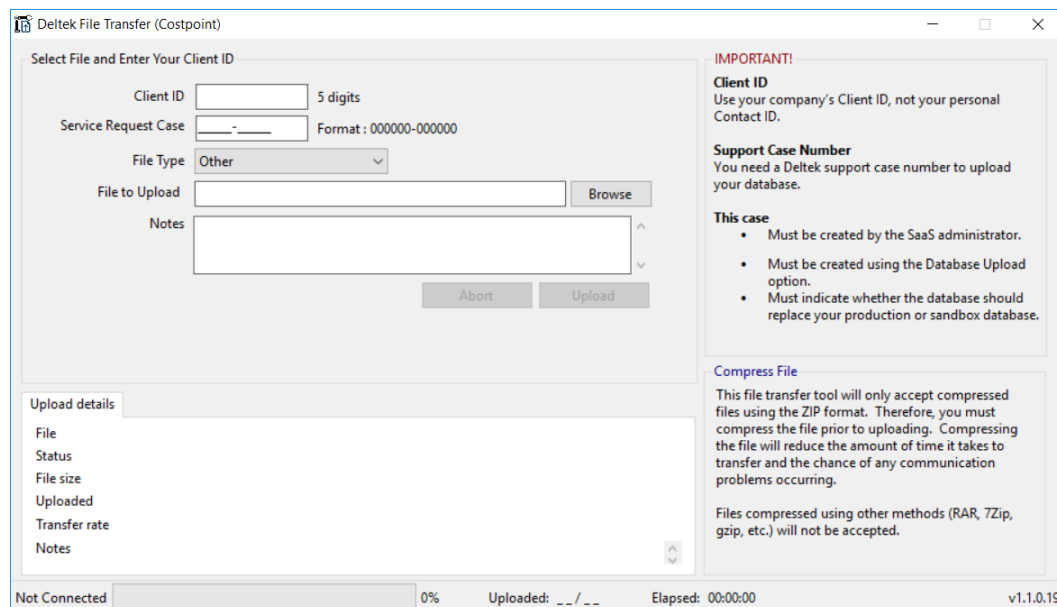
Warning: Microsoft .NET Framework 3.5 SP1 must be installed on the workstation from which the database is being uploaded.

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



2. Click **Install**.

When the installation completes, a dialog box displays.



3. Complete the fields in the dialog box.

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

4. 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
Client ID	Enter your 5-digit client ID.
Service Request Case	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.

Deltek File Transfer (Costpoint)

Enter Details to Encrypt

Client ID: 12345 (5 digits)

Service Request Case: 123456-778900 (Format: 000000-000000)

File Type: Password

Product Type: Costpoint DB File

Password: [Empty Field]

Buttons: Abort, Upload

IMPORTANT!

Client ID
Use your company's Client ID, not your personal Contact ID.

Support Case Number
You need a Deltek support case number to upload your database.

This case

- Must be created by the SaaS administrator.
- Must be created using the Database Upload option.
- Must indicate whether the database should replace your production or sandbox database.

Guideline
This will encrypt and transmit a password to Deltek Cloud Operations. Please provide only the password - do not include a user name or any other information in the password field

Upload details

Status: Not Connected

File size: 0%

Uploaded: 0%

Elapsed: 00:00:00

v1.1.0.19

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

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

4. Click **Upload**.

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



About Deltek

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