



Deltek

Deltek Costpoint®

8.2

Import FAR/
Supplemental Regulation
Files Preprocessor -
Manage Contracts

December 20, 2023



While Deltek has attempted to verify that the information in this document is accurate and complete, some typographical or technical errors may exist. The recipient of this document is solely responsible for all decisions relating to or use of the information provided herein.

The information contained in this publication is effective as of the publication date below and is subject to change without notice.

This publication contains proprietary information that is protected by copyright. All rights are reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, or translated into another language, without the prior written consent of Deltek, Inc.

This edition published December 20, 2023.

© 2023 Deltek, Inc.

Deltek's software is also protected by copyright law and constitutes valuable confidential and proprietary information of Deltek, Inc. and its licensors. The Deltek software, and all related documentation, is provided for use only in accordance with the terms of the license agreement. Unauthorized reproduction or distribution of the program or any portion thereof could result in severe civil or criminal penalties.

All trademarks are the property of their respective owners.

Contents

Import FAR/Supplemental Regulation Files Subtask..... 1

 Step-by-Step Procedures on Importing Files..... 3

 Input File Information.....4

 Error Messages..... 11

Import FAR/Supplemental Regulation Files Subtask

Use this subtask to import FAR, DFARS, and other supplemental regulation clauses from comma-separated file(s) into the contract record.

There are two ways to work with input files in Costpoint:

- You can access the input file from the network by using alternate file locations.
- You can upload the input file to the Costpoint database; in which case, no further access to network folders is necessary.

Note: If you decide to use the first option, click the **File Location** field to select an alternate file location. If you choose the second option, leave the **File Location** field blank and use the File Upload Manager to upload the input file to the Costpoint database.

You can import two types of clauses using this subtask: **FAR Clause/Provision** and **Supplemental Regulation**, the latter including Defense Federal Acquisition Regulation Supplement (DFARS) clauses. You should create separate input files for the two types as they have different file layouts and update two different subtasks upon successful import:

- **FAR Clause/Provision** updates the FAR Clauses/Provisions subtask.
- **Supplemental Regulation** updates the Supplemental Regulations subtask.

For more information on creating comma-separated value (CSV) files, see [Input File Information](#).

When you import files and errors are found, Costpoint automatically displays the Import FAR/Supplemental Regulation Files Error Report, and you can review the errors. See [Error Messages](#) for possible errors that you can encounter. Once you have imported the files without errors, Costpoint updates the FAR Clauses/Provisions and/or Supplemental Regulations subtasks of Manage Contracts with the information you imported. Only FAR clauses/provisions and supplemental regulations that do not previously exist will be imported upon successful import.

You have to save the contract record before the updates can be reflected in the respective Costpoint database tables.




Note: If the input file contains an invalid contract ID (that is, it does not match the contract ID on the screen), the import process will be completed without any error, but the row or record with the invalid contract ID will not be imported and inserted into the FAR Clauses/Provisions and/or Supplemental Regulations subtasks.

For more information on importing FAR and supplemental regulations to Costpoint, see [Step-by-Step Procedures on Importing Files](#).

Contents

Click **New** to add a new line.

Field	Description
Regulation Type	Select the regulation type for the file record you want to upload. Valid options are FAR Clause/Provision and Supplemental Regulation .

Field	Description
	<p>Note: Make sure that the type you select matches the corresponding type of the CSV file you are importing to avoid errors. For example, if you select FAR Clause/Provision, ensure that the input file follows the input file layout for FAR clauses/provisions as indicated in Input File Information.</p>
File ID	Enter a unique file ID to identify the import file record.
Date Imported	This field displays the system date when the file was successfully imported. This is not editable. Once this field is populated, you cannot re-import the same file.
Document Type	This field displays CSV when you save the record and is not editable.
File Location	<p>Enter the location of the input file you are importing. There are two ways to do this:</p> <ul style="list-style-type: none"> In the File Location field, enter, or click  to select, the alternate file location where the input file is located. Alternate file locations are set up on the Manage Alternate File Locations screen. From the Global Menu, click Process » File Upload. On the File Upload Manager dialog box, click Browse and use the dialog box to select the file you want to upload. If you select the Overwrite? check box, Costpoint will overwrite any file of the same name that already exists in the Costpoint database. Click Upload when you are finished. If you use this method, leave the File Location field blank. For more information about the File Upload Manager, see the File Upload Manager topic in the Getting Started Guide. <p>Note: If you select the Overwrite? check box, you will not be able to view the original file. It is recommended to upload files with a new file ID and name that is not in use to preserve files. See the following examples of file naming conventions that you can use:</p> <ul style="list-style-type: none"> CNTR-0000001Award (first file upload) CNTR-0000001Mod1 (first modification) CNTR-0000001Mod2 (second modification)
File Name	<p>If you entered or selected a value in File Location, enter, or click  to select, the file name of the input file saved in the network folder.</p> <p>If you used the File Upload Manager, enter, or click  to select, the file name of the input file uploaded to the Costpoint database.</p>
Comments	Enter comments about the import file.

Field	Description
View File	Click this button to view the import file. When you click this button, a prompt that asks if you want to open or save the import file displays.
Import File	Click this button to import the file.

Step-by-Step Procedures on Importing Files

Here are the steps on importing FAR, DFARS, and other supplemental regulation clauses from an input file into Costpoint.

To import regulation clauses/provisions into Costpoint using comma-separated values (CSV) files:

1. Create the CSV files in the format defined by the input file layout. The file layout depends on the type of the regulation type you are importing and whether you are importing the file into the Manage FAR Library, Manage Supplemental Regulations Library, Manage Contracts, or Manage Subcontracts screen. See the following topics for more information:

- [Input File Information - Manage FAR Library](#)
- [Input File Information - Manage Supplemental Regulations Library](#)
- [Input File Information - Manage Contracts](#)
- [Input File Information - Manage Subcontracts](#)

You can use any file name for the input files, but you must make sure that the order and column headers in the input file layout are followed. Otherwise, Costpoint displays the following error message when you import the file: "Invalid Import File Format."

2. Go to the CRM & Contracts domain and upload the input files. You can upload the input files into the CRM & Contracts domain using the Import FAR/Supplemental Regulation Files subtask on the following screens:
 - **Manage FAR Library:** The subtask is available on the main screen. On this subtask, you can import only FAR clauses/provisions.
 - **Manage Supplemental Regulations Library:** The subtask is available on the main screen. On this subtask, you can import only supplemental regulation clauses.
 - **Manage Contracts screen:** The subtask is available on the Contract Info tab. On this subtask, you can import both FAR and supplemental regulation files.
 - **Manage Subcontracts screen:** The subtask is available on the Subcontract Info tab. On this subtask, you can import both FAR and supplemental regulation files.

You can either use the **File Location** field on the subtask to specify the alternate file location where the input file is located, or leave the **File Location** field blank and use the File Upload Manager to upload the input file to the Costpoint database.

When you try to select a file which is a non-CSV type, Costpoint displays the following error message: "The application was unable to read the input file. Please make sure the input file is a comma separated file type."

3. Enter field information on the subtask.
 4. Click the **Import File** button on the subtask.
Costpoint performs one the following:
 - If no errors are encountered, Costpoint imports the information from the input file and updates the screen where the input file was imported. The **Date Imported** field is also populated with the system date. You can proceed to step 7.
- Note:** Once the input file has been imported successfully, you cannot re-import it. If you click the **Import File** button for the same file, Costpoint displays the following error message: "This file has already been imported."
- If errors are encountered, Costpoint displays an error report. Review the error report and proceed to step 5.
 5. Make corrections to the CSV file(s) and upload again.
 6. Repeat steps 2-5 until the import process completes without errors.
 7. Save the record.
After you save the record, Costpoint updates the database tables with information from the imported file(s).

Input File Information

Use this information as a guide in creating an input file that you can upload to Costpoint using the Import FAR/Supplemental Regulation Files subtask of the Manage Contracts screen.

Input File Layout

The first row in every file is reserved for column headings. The program does not read the first row.

FAR Clause/Provision regulation type

Use the following input file layout when you select the **FAR Clause/Provision** regulation type on the Import FAR/Supplemental Regulation Files subtask of Manage Contracts.

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
1	CNTR_ID	Contract ID	Character	30	Optional	If a value is not supplied in the input file, the Contract ID specified on the	

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
						screen defaults.	
2	FAR_ID	FAR Number	Character	25	Required only if Title is not supplied in the input file.		
3	FAR_TITLE	Title	Character	256	Optional	If the FAR number is supplied in the input file, Costpoint checks if that number exists on the Manage FAR Library screen and defaults its corresponding Title . If the FAR number does not exist or is not provided in the input file, Costpoint accepts the title in the input file.	To include special characters , enclose the whole Title text with double quotation marks. For example: "This title has special characters #\$\$%"
4	FAR_TYPE	FAR Type (Clause/ Provision)	Character	1	Required	If the FAR number is supplied in the input file, Costpoint checks if that	C, P, or U

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
						number exists on the Manage FAR Library screen and defaults its corresponding Clause or Provision value. If the FAR number does not exist and the FAR type is not provided in the input file, Costpoint indicates in the error report that the FAR type is required.	
5	CNTR_FAR_DESC	Description from Contract	Character	100,000	Optional		If you are adding special characters or double quotation marks, enclose the whole Description text with double quotation marks. For example:

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
							<p>"special characters # \$ %"</p> <p>"Adding these quotes "" within this description"</p> <p>"Adding these quotes "" and special characters # \$ % within this description"</p> <p>If you are adding new lines, enclose this field in double quotation marks. For example: "first line second line"</p>
6	EFFECT_DT	Effective Date	Date	Date	Optional		Format date as yyyy-mm-dd.
7	APPLIC_FL	Applicable to Contract	Character	1	Optional	If a value is not supplied in the input file, Y defaults.	Y or N

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
8	PAGE_NO	Page No	Number	10	Optional		
9	PAGE_REF_ID	Page Reference No	Character	10	Optional		
10	COMMENTS	Comments	Character	254	Optional		
11	RISK_LVL_FL	Risk Level	Character	1	Optional		H (High), M (Medium), or L (Low)
12	FAR_NOTES	Notes	Character	256	Optional		
13	SUBCNTR_FLOW_FL	Subcontract Flow-down	Character	1	Optional		O (Optional), Y (Required), or N (Not Required)

Supplemental Regulation regulation type

Use the following input file layout when you select the **Supplemental Regulation** regulation type on the Import FAR/Supplemental Regulation Files subtask of Manage Contracts.

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
1	CNTR_ID	Contract ID	Character	30	Optional	If a value is not supplied in the input file, the Contract ID specified on the screen defaults.	
2	DFAR_ID	Clause Number	Character	25	Required		
3	DFAR_TITLE	Title	Character	256	Optional	If the clause	To include special

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
						number is supplied in the input file, Costpoint checks if that number exists on the Manage Supplemental Regulations Library screen and defaults its corresponding Title . If the clause number does not exist or is not provided in the input file, Costpoint accepts the title in the input file.	characters , enclose the whole Title text with double quotation marks. For example: "This title has special characters #\$\$%"
4	AGENCY_CD	Agency	Character	15	Optional		
5	CNTR_DFAR_DESC	Description from Contract	Character	100,000	Optional		If you are adding special characters or double quotation marks, enclose the whole Description text with double

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
							<p>quotation marks. For example: "special characters # \$"</p> <p>"Adding these quotes "" within this description"</p> <p>"Adding these quotes "" and special characters # \$" within this description"</p> <p>If you are adding new lines, enclose this field in double quotation marks. For example: "first line second line"</p>
6	EFFECT_DT	Effective Date	Date	Date	Optional		Format date as yyyy-mm-dd.
7	APPLIC_FL	Applicable to Contract	Character	1	Optional	If a value is not supplied in	Y or N

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
						the input file, Y defaults.	
8	PAGE_NO	Page No	Number	10	Optional		
9	PAGE_REF_ID	Page Reference No	Character	10	Optional		
10	COMMENTS	Comments	Character	254	Optional		
11	RISK_LVL_FL	Risk Level	Character	1	Optional		H (High), M (Medium), or L (Low)
12	DFAR_NOTES	Notes	Character	256	Optional		
13	SUBCNTR_FLOW_FL	Subcontract Flow-down	Character	1	Optional		O (Optional), Y (Required), or N (Not Required)

Error Messages

This section contains the error messages you may encounter when importing regulation clauses using the Import FAR/Supplemental Regulation Files subtask of the Manage Contracts screen.

FAR Clause/Provision

The following error messages may display on the error report when you import an input file for the **FAR Clause/Provision** regulation type.

Field Name	Column Name	Condition	Error Message
Contract ID	CNTR_ID		The following field is too long: Contract ID.
FAR Number	FAR_ID		The following field is too long: FAR Number.
Title	FAR_TITLE		The following field is too long: Title.

Field Name	Column Name	Condition	Error Message
FAR Number and Title	FAR_ID and FAR_TITLE	Both are blank.	The following field is required: FAR Number or Title.
FAR Type	FAR_TYPE	FAR Type is not C, P, or U.	The following field does not contain a valid value of 'C' or 'P' or 'U': FAR Type.
Effective Date	EFFECT_DT		The following field does not contain a valid date: Effective Date.
Applicable to Contract	APPLIC_FL	Applicable to Contract is not Y or N.	The following field does not contain a valid value of 'Y' or 'N': Applicable to Contract.
Page No	PAGE_NO		The following field does not contain a valid number: Page No.
			The following field is too long: Page No.
		Page No is negative.	The following field cannot be negative: Page No.
Page Reference Number	PAGE_REF_ID		The following field is too long: Page Reference No.
Comments	COMMENTS		The following field is too long: Comments.
Risk Level	RISK_LVL_FL	Risk Level is not H, M, or L.	The following field does not contain a valid value of 'H', 'M', or 'L': Risk Level.
Subcontract Flow-down	SUBCNTR_FLOW_FL	Subcontract Flow-down is not O, Y, or N.	The following field does not contain a valid value of 'O', 'Y', or 'N': Subcontract Flow-down.
Notes	FAR_NOTES		The following field is too long: Notes.

Supplemental Regulation

The following error messages may display on the error report when you import an input file for the **Supplemental Regulation** regulation type.

Field Name	Column Name	Condition	Error Message
Contract ID	CNTR_ID		The following field is too long: Contract ID.
Agency	AGENCY_CD		The following field does not contain a valid value: Agency.
			The following field is too long: Agency.
Clause Number	DFAR_ID	Clause Number is blank.	The following field is required: Clause Number.
			The following field is too long: Clause Number.
Title	DFAR_TITLE		The following field is too long: Title.
DFAR Description	CNTR_DFAR_DESC		The following field is too long: Description from Contract.
Effective Date	EFFECT_DT		The following field does not contain a valid date: Effective Date.
Applicable to Contract	APPLIC_FL	Applicable to Contract is not Y or N.	The following field does not contain a valid value of 'Y' or 'N': Applicable to Contract.
Page No	PAGE_NO		The following field does not contain a valid number: Page No.
			The following field is too long: Page No.
		Page No is negative.	The following field cannot be negative: Page No.
Page Reference Number	PAGE_REF_ID		The following field does not contain a

Field Name	Column Name	Condition	Error Message
			valid value: Page Reference No.
			The following field is too long: Page Reference No.
Comments	COMMENTS		The following field is too long: Comments.
Risk Level	RISK_LVL_FL	Risk Level is not H, M, or L.	The following field does not contain a valid value of 'H', 'M', or 'L': Risk Level.
Subcontract Flow-down	SUBCNTR_FLOW_FL	Subcontract Flow-down is not O, Y, or N.	The following field does not contain a valid value of 'O', 'Y', or 'N': Subcontract Flow-down.
Notes	DFAR_NOTES		The following field is too long: Notes.

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management, and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue.

www.deltek.com