

Deltek Costpoint®

Version 7.1.1

June 30, 2016



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 June 2016.

© 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.

MANAGE EMPLOYEE IMPORT USER-DEFINED FORMAT

Table of Contents

MANAGE EMPLOYEE IMPORT USER-DEFINED FORMAT.....	1
PROCESSING DETAILS.....	2

MANAGE EMPLOYEE IMPORT USER-DEFINED FORMAT

You can use this screen to specify the number of fields to include and the position of the fields in each record of the ASCII file you are uploading. For example, if employee records you want to upload contain four fields, such as a Record Code, Employee ID, Notes, and Effective Date, for each record you can choose to select all four fields to upload, or upload a subset of the four.

This is a separately licensed product for the current release of Deltek Costpoint.

Location

- People
- Employee
- Employee Interfaces

Identification

Record

From the drop-down list, select a layout file record number (1-5). The field to the right displays the **Record** description.

Autoload

After making a selection in the Record field, click this button to load the available fields into the **Fields** table window.

Fields

Field Description

This column displays each field that can be included in the file upload. Highlight the fields that you want to include. Then click the **Select** button.

Field Number

This column displays the incremental position of the field in the layout file.

Selected Fields

Field Description

This column displays all fields you have chosen to upload from all available fields in the selected record. The fields listed will be included in the upload.

Field Number

This column displays the incremental position of the fields in the layout file.

Select

After highlighting rows in the **Fields** table window, click this button to move the highlighted rows from the **Fields** table window to the **Selected Fields** table window.

File Layout

The position of fields and the number of fields in the file you create is customized by you. The resulting format of the file is CSV.

Processing Details

Processing details for this file are the same as those for the file created from the Import Employee Data Interface preprocessor.

PROCESSING DETAILS

Processing Details

1. Multiple employee records for the same employee can be imported using either the comma-separated file layout or the user-defined file layout. The effective date in the records must match with each other. For example, an employee record can be imported with an effective date of 3/01/2017. Records 1, 2, 3, 4 and 5 must all have that effective date. Another record for that employee can be imported using an effective date of 8/01/2017 and all those records must use that date.
2. Any existing rows in the worktables are deleted. (Normally there is not any data in these tables at the start of processing unless a previous attempt to use the Import Employee Data screen terminated abnormally.)
3. The input file you specify is opened for read-only access. An output file with the same name as the input file but with the three-letter extension ".ERR" is opened for write access. For example, if you select an input file of "EMPLDATA.DAT," the preprocessor opens an output file called "EMPLDATA.ERR." (Note that, if a file with the same name as the output file already exists, it is overwritten.)
4. The input worktable is loaded with data from the input text file. For Comma-Separated Format (CSV) files, the program checks the length of each field as it is being read into the worktable. If a field is too long to fit into the input worktable, the field is truncated, the record is rejected, or you are asked whether to truncate or reject the record, depending upon your selection in the **Truncated Values** drop-down list. For fixed-length format files, the preprocessor checks the line length and displays a warning message if a line is either longer or shorter than the expected length.
5. When the input table has been loaded, the preprocessor begins scanning the records for null values in any fields you have designated for default value substitution in the **Default Values** group box. For example, if you specified that **WKLY** is substituted for any blank **Timesheet Cycle** fields, the preprocessor scans the table for any blank **Timesheet Cycles**. If a blank is found, the preprocessor changes the field value to **WKLY**.
6. After all default value substitutions are completed, the preprocessor performs all data validations on the input table (see discussion below). Records containing invalid field values are marked for deletion, and error messages are written to the error table.
7. When validations are finished, the preprocessor deletes all records containing invalid values from the input table and writes these records to the output error file. At the conclusion of processing, you can review the error report and make corrections. After the corrected error file is renamed, you can re-run the preprocessor using that file as the new input file.
8. After the application deletes records containing invalid field values, the input table contains only records that passed all validation tests and are valid candidates for insertion or update in the Costpoint database tables. The preprocessor calculates the value for certain computed columns (such as **Annual Salary**) and updates the input table with these values.
9. The Costpoint database tables are now updated. If records already exist, they are updated or replaced. New records are inserted. If any fatal errors are encountered during this phase of processing, all transactions are rolled back and processing is aborted. For example, if the database server were to crash during the insertion of a new employee record, all processing that took place during the upload would be canceled, including all prior transactions. Either all transactions succeed or they all fail.
10. Finally, the Audit and Error reports are printed. After printing is completed, the contents of the worktables are deleted, and processing is finished.

Other Output

Error File (input file name + .ERR)

Edit Report

Error Report