Deltek

# Deltek Costpoint® 8.2

## Import Predefined Workflows Preprocessor

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# Import Predefined Workflows

Use this toolkit to upload predefined workflows provided by Deltek into your Costpoint system.

After entering your preferences, click on the toolbar to start importing workflows.

**Note:** The input file layout may contain fields that are available only in Costpoint Advanced. If you are using Costpoint Essentials, these fields are excluded from the import process and may be left blank or null when you create the input file.

## Display the Import Predefined Workflows Screen

You access the Import Predefined Workflows screen from the Administration domain.

Click **Administration** » **Workflow** » **Administrative Utilities** » **Import Predefined Workflows**.

## Contents of the Import Predefined Workflows Screen

Use the fields and options to configure the Import Predefined Workflows screen.

**Contents**

| Field | Description |
|---|---|
| **Workflow** | Use this drop-down list box to select the range of workflows you want to import. The following options are available:<br>▪ **All:** Select this option to include all available records. The **Start** and **End** fields are disabled for if you select this option.<br>▪ **One:** Select this option to include only one record. You must enter that value in the **Start** field. The **End** field is disabled if you select this option.<br>▪ **Range:** Select this option to include a contiguous range of records. You must enter the beginning value for the range in the **Start** field and the ending value of the range in the **End** field.<br>▪ **From Beginning:** Select this option to include all the records from the beginning of the available records to a specific record in the range. You must enter the last value for the range in the **End** field. The **Start** field is disabled if you select this option.<br>▪ **To End:** Select this option to include all the records from a specific record to the end of all the available records. You must enter the value from which the range should begin in the **Start** field. The **End** field is disabled if you select this option.<br>The default selection for this field is **All**. If you have a large number of jobs, you may not want to use the default option. |
| **Start** | Use this field to enter, or use to select, the starting workflow, as applicable. |

| Field | Description |
|---|---|
| **End** | Use this field to enter, or use to select, the ending workflow, as applicable. |

### Existing Standard Workflow

Use this group box to specify whether to retain or override duplicate workflows that exists in you current Costpoint system.

| Field | Description |
|---|---|
| **Retain** | Select this option to indicate that a existing Workflow should be maintained if a duplicate predefined Workflow is being uploaded. |
| **Override** | Select this option to indicate that an existing Workflow should be overridden if a duplicate predefined Workflow is being uploaded.<br>**Warning:** If a duplicate Workflow is found and you have selected the **Override** option, the in-progress data will be deleted. |

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