



Deltek

Deltek Costpoint®

8.2

Import Work Schedules
from Deltek Time and
Expense Preprocessor

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 Work Schedules From Deltek Time and Expense.....	1
Display the Import Work Schedules From Deltek Time and Expense Screen.....	1
Contents of the Import Work Schedules From Deltek Time and Expense Screen.....	2
Table Information for the Import Work Schedules From Deltek Time and Expense Screen.....	5
Warnings.....	5
Errors.....	6
File Layout.....	7

Import Work Schedules From Deltek Time and Expense

Use the Import Work Schedules from Deltek Time and Expense screen to import work schedule data directly from Deltek Time & Expense or via a comma-separated value (.csv) input file.

You can add new work schedules, update work schedules, or both. If Costpoint has a direct link to Time & Expense, you can select from a range of work schedules and dates.

Important Notes:

- When importing, records are updated or added to the WORK_SCH table; no deletions are made. In the WORK_SCH_DATE table, only the years being imported are deleted and replaced.
- The import file must have at least one **Specific Date** record for the year being imported. If the input file contains only **Day of Week** records, the application cannot determine the date. For more information, see the documentation for the **Type** field in the Manage Work Schedules screen.
- This application can import only non-employee work schedules. It cannot import work schedules that were created for specific employees.
- You must add work schedules to Deltek Time & Expense before importing them here.
- This is a separately licensed product for the current release of Deltek Costpoint.

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.

If you decide to use the first option, click  in 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.

Display the Import Work Schedules From Deltek Time and Expense Screen

You access the Import Work Schedules from Deltek Time and Expense screen from the People domain.

Click **People » Labor » Deltek Time and Expense Interface » Import Work Schedules from Deltek Time and Expense**.

Contents of the Import Work Schedules From Deltek Time and Expense Screen

Use the fields and options to configure the Import Work Schedules from Deltek Time and Expense screen.

Identification

Use the fields in this block to create a new parameter ID or to retrieve a previously saved parameter ID. A parameter ID represents a set of screen selection parameters. After you have saved a parameter ID and its related parameters, you can retrieve them using **Query**.

You can use the retrieved parameters to produce reports and run processes more efficiently and with greater consistency. The saved parameters are also useful and necessary when you want to run the process as part of a batch job. Many users save a unique set of parameters for each different way they run a report or process. When you select a previously saved parameter ID or parameter description, the associated saved screen selection parameters automatically display as selection defaults. The page setup and print options, if there are any, are also included in the saved parameter ID. You can change any of the associated selection defaults as necessary.

Field	Description
Parameter ID	Enter, or click  to select, a parameter ID of up to 15 alphanumeric characters. Choose characters for your parameter ID that help identify the type of selections you made on the screen, such as PERIOD or QUARTERLY. When you save your record, all the selections made on the screen are stored with the parameter ID. Later, you can retrieve the parameter using Query . You can use the parameter to run the process more efficiently because you can select the parameter ID with its previously defined screen selections. After the default selections display on the screen, you can override the defaults.
Description	Enter, or click  to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

This group box is available only if Costpoint has a direct link to Deltek Time & Expense.

Work Schedule

Field	Description
Option	From the drop-down list, select the range option for work schedules to import. Valid options are: <ul style="list-style-type: none"> ▪ All: Select this option include all work schedules in the process. ▪ One: Select this option to include only one work schedule in the process. Enter the work schedule in the Start field.

Field	Description
	<ul style="list-style-type: none"> ▪ Range: Select this option to include a range of work schedules in the process. The range begins with the value entered in the Start field and ends with the value in the End field. ▪ From Beginning: Select this option to include the first work schedule record up to the work schedule entered in the End field. ▪ To End: Select this option to include the work schedule entered in the Start field up to the last work schedule record.

Note: When there is not a valid connection to a Deltek Time & Expense database, this option is disabled.

Field	Description
Start	<p>Enter, or click  to select, the starting work schedule in the range you want to import. This field is required if One, Range, or To End is selected in the Option field.</p> <p>Note: When there is not a valid connection to a Deltek Time & Expense database, this option is disabled.</p>
End	<p>Enter, or click  to select, the ending work schedule in the range you want to import. This field is required if Range or From Beginning is selected in the Option drop-down list.</p> <p>Note: When there is not a valid connection to a Deltek Time & Expense database, this option is disabled.</p>

Year

Field	Description
Option	<p>From the drop-down list, select the range option for the years to import. Valid options are:</p> <ul style="list-style-type: none"> ▪ All: Select this option include all years in the process. ▪ One: Select this option to include only one year in the process. Enter the year in the Start field. ▪ Range: Select this option to include a range of years in the process. The range begins with the value entered in the Start field and ends with the value in the End field. ▪ From Beginning: Select this option to include the first year up to the year entered in the End field.

Field	Description
	<ul style="list-style-type: none"> ▪ To End: Select this option to include the year entered in the Start field up to the last year. ▪ When there is not a valid connection to a Deltek Time & Expense database, this option is disabled.
Start	<p>Enter, or click  to select, the starting year for the range of work schedules you want to import. This field is required if One, Range, or To End is selected in the Option field.</p> <div style="border: 1px solid blue; padding: 5px;"> <p>Note: When there is not a valid connection to a Deltek Time & Expense database, this option is disabled.</p> </div>
End	<p>Enter, or click  to select, the ending year for the range of work schedules you want to import. This field is required if Range or From Beginning is selected in the Option drop-down list.</p> <div style="border: 1px solid blue; padding: 5px;"> <p>Note: When there is not a valid connection to a Deltek Time & Expense database, this option is disabled.</p> </div>

Options

Field	Description
Default Flexible	<p>From the drop-down list, select the default setting of the Flexible flag. Valid options are:</p> <ul style="list-style-type: none"> ▪ Flexible Value from T&E: Select this option if you want the Flexible flag to default to the value imported from Time & Expense or the input file. ▪ Checked: Select this option if you want the Flexible flag selected for non-work days and holidays. ▪ Unchecked: Select this option if you want the Flexible flag cleared for non-work days and holidays.

Input File

Use this group box to enter information about the input file. If Costpoint has a direct link to Time & Expense, this group box is disabled.

Field	Description
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 in the Manage Alternate File Locations screen.

Field	Description
	<ul style="list-style-type: none"> 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 import. 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.
File Name	Enter, or click  to select, the name of the Time & Expense work schedule file to be processed.

Table Information for the Import Work Schedules From Deltek Time and Expense Screen

Changes to the Import Work Schedules from Deltek Time and Expense screen update the WORK_SCH table.

Warnings

The following warning messages can display on the screen.

The work schedule code is longer than 10 characters, it has been truncated.

If the work schedule code is greater than 10 characters, this warning displays. Enter a code 10 characters or less and continue.

The work schedule description is longer than 30 characters, it has been truncated.

If the work schedule description is greater than 30 characters, this warning displays. Enter a description using 30 characters or less and continue.

The flextime flag is invalid and has been set to "N"

The flextime flag is determined by your selection from the **Default Flexible** drop-down on the Import Work Schedules from Deltek Time and Expense preprocessor. It determines whether holiday and non-work hours are flexible or not. Check that this option is set as you want and continue.

The non-work flag is invalid and has been set to "N"

The holiday flag is invalid and has been set to "N"

The flextime flag is set to "Y", but the non-work and holiday flags are set to "N". The flextime flag has been set to "N"

These values are linked, so if non-work and holiday is set to **N**, then the **Default Flexible** option should be set to unchecked.

The day of week is invalid and has been replaced

If the data entered in this field does not equal SUN, MON, TUE, WED, THU, FRI or SAT, this warning displays. Enter one of these values and continue.

This description is different from the first one found for this Work Schedule. It has been replaced by the first one found in the file.

If the work schedule description for the same work schedule code has multiple values in the file, all other instances of description are replaced with the first instance found in the file.

Changing range option will clear the From field. Continue?

If you select a different option in the **Work Schedule Option** field, any value selected previously in the **Start** field will be cleared.

Changing range option will clear the To field. Continue?

If you select a different option in the **Work Schedule Option** field, any value selected previously in the **End** field will be cleared.

Changing range option will clear the From field. Continue?

If you select a different option in the **Year Option** field, any value selected previously in the **Start** field will be cleared.

Changing range option will clear the To field. Continue?

If you select a different option in the **Year Option** field, any value selected previously in the **End** field will be cleared.

Errors

The following error messages can display on the screen.

The date is invalid.

This error displays if invalid data for a date is found in the **WORK_SCH_DATE.SCHEDULE_DT** field. The date format is 01/01/2000. Correct this and continue.

The day of week is invalid for the Day of Week record.

This error displays if the day of the week field contains invalid data. (valid entries for this field are SUN, MON, TUE, WED, THU, FRI, SAT). Correct this and continue.

The standard hours are not numeric.

This error displays if the value in the standard hours field is not numeric. Correct this and continue.

The standard hours cannot be less than zero.

The standard hours imported from Deltek Time and Expense are less than zero. Correct this and continue.

The standard hours cannot be greater than 24 for one day.

The standard hours are greater than 24. Correct this and continue.

The non-work flag and holiday flag are both set to “Y”. Only one of these flags can be “Y”.

The non-work and holiday flags are both equal to Y. At least one must be set to N. Correct this and continue.

This Work Schedule Code and Schedule Date combination already exists in the input file.

If there are duplicate dates for a work schedule and the type of data is S, this error displays. Correct this and continue.

(WORK_SCH_DATE.TYPE_OF_DATA = S)

This Work Schedule Code and Day of Week combination already exists in the input file

If there are duplicate day of week records in the file for a work schedule code (WORK_SCH_DATE.TYPE_OF_DATA = D, WORK_SCH_DATE.S_DAY_OF_WEEK_CD is duplicated), this error message displays. Correct this and continue.

The work schedule code is missing or invalid.

If the work schedule in the file is null, this error displays. Correct this and continue.

The work schedule description is missing or invalid.

If the work schedule description is null, this error displays. Correct this and continue.

Work Schedule not found in work schedule table.

This error message displays if the **Work Schedule Option** you select is **One**, and the value in the **Start** field does not equal a value in the TESS work schedule table. Correct this and continue.

There is no data for that year in the work schedule table.

This error message displays if the **Year Option** you select is **One**, and the value in the **Start** field does not equal a year value in the TESS work schedule table. Correct this and continue.

File Layout

You name the work schedules input file when you import work schedules from Deltek Time and Expense.

Work Schedules File Layout

When you run the process, you create a CSV formatted file.

#	Field Name	Length	Column #
1	Work Schedule Code	Char 10	
2	Work Schedule Description (enclosed in double quotes)	Char 30	

#	Field Name	Length	Column #
3	Schedule Date	DATETIME	
4	Day of Week Code	Char 3	
5	Standard Hours	DECIMAL (8,2)	
6	Non-work flag	Char 1	
7	Holiday flag	Char 1	
8	Flexible flage	Char 1	

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