Deltek

Deltek Costpoint® 8.1

Import FAR/Supplemental Regulation Files Preprocessor - Manage Supplemental Regulations Library

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Contents

Import FAR/Supplemental Regulation Files Subtask

Use this subtask to import supplemental regulation clauses from comma-separated file(s) into the Manage Supplemental Regulations Library screen.

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 must first create a comma-separated value (CSV) file that contains the information you want to import into the Manage Supplemental Regulations Library screen before using this subtask. The file must have the correct input layout so you can successfully import it. For more information on creating CSV files, see Input File Information.

When you import files and errors are found, Costpoint automatically displays the Import Supplemental Regulations Library 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 Manage Supplemental Regulations Library screen with the information you imported. Only supplemental regulation clauses that do not previously exist will be imported upon successful import.

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

For more information on importing supplemental regulation clauses to Costpoint, see Step-by-Step Procedures on Importing Files.

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

Field	Description
Regulation Type	This field displays **Supplemental Regulation** and is not editable.
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	Enter the location of the input file you are importing. There are two ways to do this:

Field	Description
	▪ 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. **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: ▪ SUPPLREG-0000001 (first file upload) ▪ SUPPLREG-0000001Mod1 (first modification) ▪ SUPPLREG-0000001Mod2 (second modification)
File Name	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. If you used the File Upload Manager, enter, or click 🔍 to select, the file name of the input file uploaded to the Costpoint database.
Comments	Enter comments about the import file.
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 Supplemental Regulations Library screen.

Input File Template

Download the following template CSV file from the Deltek Support Center site at https://deltek.custhelp.com: CTMDFAR.CSV. You need your regular login and password to download this file.

Input File Layout

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

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
1	DFAR_ID	Clause Number	Character	25	Required		
2	DFAR_TITLE	Title	Character	256	Required	If the clause 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	To include special characters, enclose the whole **Title** text with double quotation marks. For example: "This title has special characters #$%"

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
						not provided in the input file, Costpoint accepts the title in the input file.	
3	AGENCY_CD	Agency	Character	15	Optional		
4	SOURCE_CD	Source	Character	1	Optional	U	U (User) or S (System)
5	REQ_FL	Required	Character	1	Optional	N	Y or N
6	INCLUDE_FL	Included	Character	1	Optional	Null	I (IBR) or F (Full Text)
7	RISK_LVL_FL	Risk Level	Character	1	Optional	Null	H (High), M (Medium), or L (Low)
8	DFAR_DESC	Description	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: "special characters #$%"

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Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
							"Adding these quotes "" within this description"
							"Adding these quotes "" and special characters #$% within this description"
							If you are adding new lines, enclose this field in double quotation marks. For example: "first line second line"
9	EDIT_FL	Editable	Character	1	Optional	N	Y or N
10	EFFECT_DT	Effective Date	Date	Date	Optional		Format date as yyyy-mm-dd.
11	SHOW_LOOKUP_FL	Show in Lookup	Character	1	Optional	Y	Y or N
12	DFAR_NOTES	Notes	Character	256	Optional		
13	SUBCNTR_FLOW_FL	Subcontract Flow-down	Character	1	Optional	Null	O (Optional), Y (Required)

Column No	Column Name	Field Name	Data Type	Data Length	Required / Optional	Defaulting Information	Contents
							, or N (Not Required)
14	SUBCNTR_NOTES	Subcontract Notes	Character	256	Optional		
15	MITIGATION_TYPE	Mitigation Type	Character	1	Optional	Null	P (Price) or C (Cost Impact)
16	MITIGATION_NOTES	Mitigation Notes	Character	256	Optional		
17	ADDED_DT	Added Date	Date	Date	Optional		Format date as yyyy-mm-dd.

Error Messages

This section contains the error messages you may encounter when importing DFARS and other supplemental regulation clauses using the Import FAR/Supplemental Regulation Files subtask of the Manage Supplemental Regulations Library screen.

The following error messages may display on the error report when you import an input file into Costpoint using the Import FAR/Supplemental Regulations File subtask.

Field Name	Column Name	Condition	Error Message
Clause Number	DFAR_ID		The following field is too long: Clause Number.
			The following field is required: Clause Number.
Title	DFAR_TITLE		The following field is too long: Title.
			The following field is required: Title.
Description	DFAR_DESC		The following field is too long: DFAR Description.
Effective Date	EFFECT_DT		The following field does not contain a

Field Name	Column Name	Condition	Error Message
			valid date: Effective Date.
Required	REQ_FL	Required is not Y or N.	The following field does not contain a valid value of 'Y' or 'N': Required.
Agency	AGENCY_CD		The following field does not contain a valid value: Agency code.
Included	INCLUDE_FL	Included is not I or F.	The following field does not contain a valid value of 'I' or 'F': Included on 'future' PO's or CER Reports.
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.
Editable	EDIT_FL	Editable is not Y or N.	The following field does not contain a valid value of 'Y' or 'N': Editable.
Show in Lookup	SHOW_LOOKUP_FL	Show in Lookup is not Y or N.	The following field does not contain a valid value of 'Y' or 'N': Show in Lookup.
Notes	DFAR_NOTES		The following field is too long: Notes.
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.
Subcontract Notes	SUBCNTR_NOTES		The following field is too long: Subcontract Notes.
Mitigation Type	MITIGATION_TYPE	Mitigation Type is not P or C.	The following field does not contain a valid value of 'P' or 'C': Mitigation Type.

Field Name	Column Name	Condition	Error Message
Mitigation Notes	MITIGATION_NOTES		The following field is too long: Mitigation Notes.

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