



Deltek

Deltek Costpoint®

8.2

Import IWO Allocations
Preprocessor

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Import IWO Allocations

Use this screen to import IWO allocations.

After the IWO transactions have been exported from the sending database and exist as a .csv file, you must import it into the receiving database.

The data exported now exists, not in Costpoint-owned tables, but in tables owned by the receiving location. Use the Import IWO Allocations screen to move the data to Costpoint-owned tables. After the import process is complete, the data resides in IWO_ALLOC_XXX_SUSP (suspense) tables.

After you are satisfied with the export of your IWO tables, use this screen to import them to the receiving database. This screen is step eight. If the IWO transfer is within the same database, this screen is not necessary.

Note: 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.

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 IWO Allocations Screen

You access the Import IWO Allocations screen from the Projects domain.

Click **Projects » Inter-Company Work Orders » Inter-Company Work Orders Interfaces » Import IWO Allocations**.

Contents of the Import IWO Allocations Screen



Use the fields and options to configure the Import IWO Allocations screen.

Import IWO Allocations

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

Field	Description
Sending Location	Use the fields in this group box to enter the sending location of the IWO transfers.
Option	Use this drop-down list to select the range of locations that you want to process. Valid options are: <ul style="list-style-type: none"> ■ All ■ One ■ Range ■ From Beginning ■ To End The default for this field is All .
Start	Enter the starting location for the range you want to process. If you select All or From Beginning in the Range Option field, this field is inactive.
End	Enter the ending location for the range you want to process. If you select All , One , or To End in the Range Option field, this field is inactive.

Generate

Field	Description
File Location	Enter the location of the input file you are importing. There are two ways to do this:



Field	Description
	<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, enter the location and name of the file you are importing, or click Browse and use the dialog box to select the file. 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: It is possible to import the same records more than once, but the application gives you a soft warning.</p>

Options

Field	Description
Create Duplicates	Select this check box to allow duplicate entries.

Multicurrency IWOs

Use the fields in this group box to override the rate group and rate date for the IWO allocations to be imported. These fields are enabled only if you licensed for Multicurrency, and are optional.

Field	Description
Rate Group	<p>Enter, or click  to select, the rate group to be used for the IWO allocation for import. If you do not enter a value, this field will default to the rate group specified in the input file.</p> <p>Note: You must enter a valid rate group or leave this field blank; otherwise, Costpoint displays an error message and you will not be able to create the IWO allocation.</p>
Rate Date	<p>Enter, or click  to select, the exchange rate date. If you do not enter a value, this field will default to the rate date specified in the input file.</p>

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