Deltek

Deltek Costpoint® 8.0

Import Project Master Data from Templates Preprocessor

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Import Project Master Data from Templates

Use this screen to import approved projects that you entered on the Manage Project Master Data from Templates screen into the Manage Project User Flow.

The import process:

- Creates all higher levels of a project if you did not use the Create Projects from Templates screen before you entered a project on the Manage Project Master Data from Templates screen.
- Removes the imported projects from the Manage Project Master Data from Templates screen.
- Makes the projects available on the Manage Project User Flow.
- Provides a Quick Project Information report for you to preview or print.

Use this screen after you approve a quick project and you want the project to be available on the Manage Project User Flow.

Attention: To know more about the advantages of using screens in the New Project Setup from Templates application group over other project setup options, see related topics here.

Display the Import Project Master Data from Templates Screen

You access the Import Project Master Data from Templates screen from the Projects domain.

Click **Projects** » **Project Setup** » **Project Master** » **Import Project Master Data from Templates**.

Contents of the Import Project Master Data from Templates Screen

Use the fields and options to configure the Import Project Master Data from Templates 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 Query 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 Query to select, a parameter description of up to 30 alphanumeric characters.

Selection Ranges

Use the fields in this block to select the applicable project and project manager selection criteria for selecting the projects you want to import.

Projects

Field	Description
Option	Use this drop-down list to select an option to filter and determine the projects to import. After you select an option, make the appropriate entries in the project **Start** and **End** fields. Valid options are: ▪ **All**: Select this option to include all available projects. The **Start** and **End** fields are not enabled. ▪ **One**: Select this option to include only one project. You must enter that project in the **Start** field. The **End** field is not enabled. ▪ **Range**: Select this option to include a contiguous range of projects. You must enter the beginning project for the range in the **Start** field and the ending project of the range in the **End** field. ▪ **From Beginning**: Select this option to include all projects from the beginning of the available projects to a specific project in the range. The **Start** field is not enabled. You must enter the last project for the range in the **End** field. ▪ **To End**: Select this option to include all projects from a specific project to the end of all the available projects. You must enter the project from which the range should begin in the **Start** field. The **End** field is not enabled.
Start	Enter, or click to select, the starting value for the range of projects to import. If you select **All** or **From Beginning** in the **Option** field, the **Start** field is not enabled. If you select **One**, **Range**, or **To End** in the **Option** field, you must enter a value in the **Start** field.
End	Enter, or click to select, the ending value for the range of projects to import.

Field	Description
	If you select **All**, **One**, or **To End** in the **Option** field, the **End** field is not enabled. If you select **Range** or **From Beginning** in the **Option** field, you must enter a value in the **End** field.

Project Managers

Field	Description
Option	Use this drop-down box to select an option to filter and determine the projects to import based on the project manager associated with a project. Valid options are: ▪ **All**: Select this option to include all available project managers. The **Start** and **End** fields are not enabled. ▪ **One:** Select this option to include only one project manager. You must enter that project manager in the **Start** field. The **End** field is not enabled. ▪ **Range**: Select this option to include a contiguous range of project managers. You must enter the beginning project manager for the range in the **Start** field and the ending project manager of the range in the **End** field. ▪ **From Beginning**: Select this option to include all project managers from the beginning of the available project managers to a specific project manager in the range. The **Start** field is not enabled. You must enter the last project manager for the range in the **End** field. ▪ **To End**: Select this option to include all project managers from a specific project manager to the end of all the available project managers. You must enter the project manager from which the range should begin in the **Start** field. The **End** field is not enabled.
Start	Enter, or click  to select, the starting value for the range of project managers whose projects you want to import. If you select **All** or **From Beginning** in the **Option** field, the **Start** field is not enabled. If you select **One**, **Range**, or **To End** in the **Option** field, you must enter a value in the **Start** field.
End	Enter, or click  to select, the ending value for the range of project managers whose projects you want to import. If you select **All**, **One**, or **To End** in the **Option** field, the **End** field is not enabled. If you select **Range** or **From Beginning** in the **Option** field, you must enter a value in the **End** field.

Table Information for the Import Project Master Data from Templates Screen

Changes to the Import Project Master Data from Templates screen update several tables.

Updated tables include:

- QPROJ
- PROJ
- PROJ_EDIT
- PROJ_LVL
- PROJ_REV_SETUP
- PROJ_BILL_INFO
- PROJ_CUST_SETUP
- PROJ_MOD

FAQs

This section contains FAQs about the Manage Project Master data from Templates screen.

Where Do I Approve a Quick Project?

You can approve a quick project on either the Manage Project Master Data from Templates screen or on the Approve Projects from Templates screen. On the Approve Projects from Templates screen, you can approve more than one project at a time.

What Steps Must I Complete before Importing a Quick Project?

1. Optional: Use the Create Projects from Templates screen to build all levels of a new project. After you generate a quick project and its levels, you can open it on the Manage Project Master Data from Templates screen to enter project information and approve it.
2. Enter a new project directly on the Manage Project Master Data from Templates screen. Complete the entry on each tab as needed.
3. Approve the quick project on either the Manage Project Master Data from Templates screen or on the Approve Projects from Templates screen.

What Steps Must I Complete after Importing a Quick Project?

Run the Update Project Contract and Funded Values and Update Project Period of Performance toolkits. This updates contract and funding values and period of performance dates at each project level in the Project Master.

Import Quick Projects

Follow a few steps to import quick projects to Costpoint.

To import quick projects:

1. Click New.
2. Enter a new parameter ID and parameter description, or to select a previously saved parameter ID, click .

3. From the drop-down list in the **Option** field in the **Projects** group box, select one of the options (**All**, **One**, **Range**, **From Beginning**, or **To end**) to filter and select the approved quick projects you want to import.
4. Based on what you enter in the **Option** field, enter the appropriate projects in the **Start** and/or **End** field.
5. From the drop-down list in the **Option** field in the **Project Managers** group box, select one of the options (**All**, **One**, **Range**, **From Beginning**, or **To end**) to filter and select the project managers whose approved quick projects you want to import.
6. Based on what you enter in the **Option** field, enter the appropriate project managers in the **Start** and/or **End** field.
7. Run the Quick Project Information report by clicking .
8. From the Process menu, select Default Action (or click ) to import projects.
9. Run the Update Project Contract and Funded Values and Update Project Period of Performance toolkits.

   This updates contract and funding values and period of performance dates at each project level in the Project Master.

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