

# Mastering Costpoint: Hot Topics and System Innovations



Redstone  
Government Consulting

*Helping You Navigate the Maze of Government Contracting*

**Instructors**  
Pamela Greer  
Shannon Kee

# Pamela Greer

Director – Costpoint Consulting

- 25+ years with Costpoint
  - Costpoint User with NASA Contractor, DoD Contractor and Telecommunication company
  - Costpoint Consultant with Small, Medium and Large Government Contractors
  - Costpoint Consultant with Companies in Aerospace, DoD, IT Services, Protection Services, and many more.
- 6 Years Redstone Government Consulting
  - Costpoint Team Lead
  - Costpoint Implementations / Re-Implementations
  - Costpoint System Reviews
  - Costpoint Outsourcing Services
  - Costpoint Training Classes
  - Costpoint Custom BI Report Creation
  - Accounting Systems Audit Support



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# Shannon Kee

Senior Managing Consultant

- Shannon is a Senior Managing Consultant in Redstone GCI's Costpoint Consulting Team. She has used Deltek Costpoint with government contractors for over 10 years. Her experience has covered multiple areas within the system and involved more than the standard day-to-day transactions. She led teams through several system modifications and upgrades, including reorganizations, merging databases and system enhancements.
- After obtaining her CPA license, she spent several years working in public accounting preparing individual and trust tax returns. She then entered the world of Deltek Costpoint, working at a not-for-profit. She was responsible for all general ledger and intercompany activities for four entities and creating standardized processes for these areas.
- Then, she transitioned to the for-profit world, becoming the director of finance and accounting. She successfully led all financial, DCAA, NASA, and ERISA audits and was instrumental in obtaining a certified accounting system and preparing the annual incurred cost submissions. She also served as the SAAS admin, leading multiple successful Costpoint upgrades and reorganizations. She also functioned as the main report writer for the company – turning ad hoc data requests into repeatable reports that stakeholders could run ad hoc, or have delivered to their inboxes.



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# AGENDA

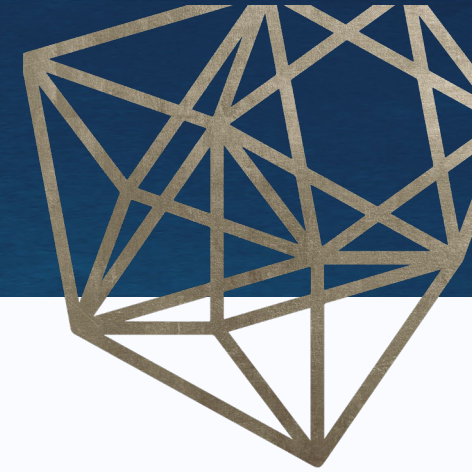
## 1) Costpoint Hot Topics



## 2) Costpoint System Innovations



# COSTPOINT HOT TOPICS



CUSTOMIZED  
DASHBOARDS – YES YOU  
CAN!



REPORTS YOU DIDN'T  
KNOW YOU NEEDED!



WANT TO OR NOT – RATE  
ADJUSTMENTS INVOICES



THE TOP 5S OF CRM &  
CONTRACTS

# Business Intelligence

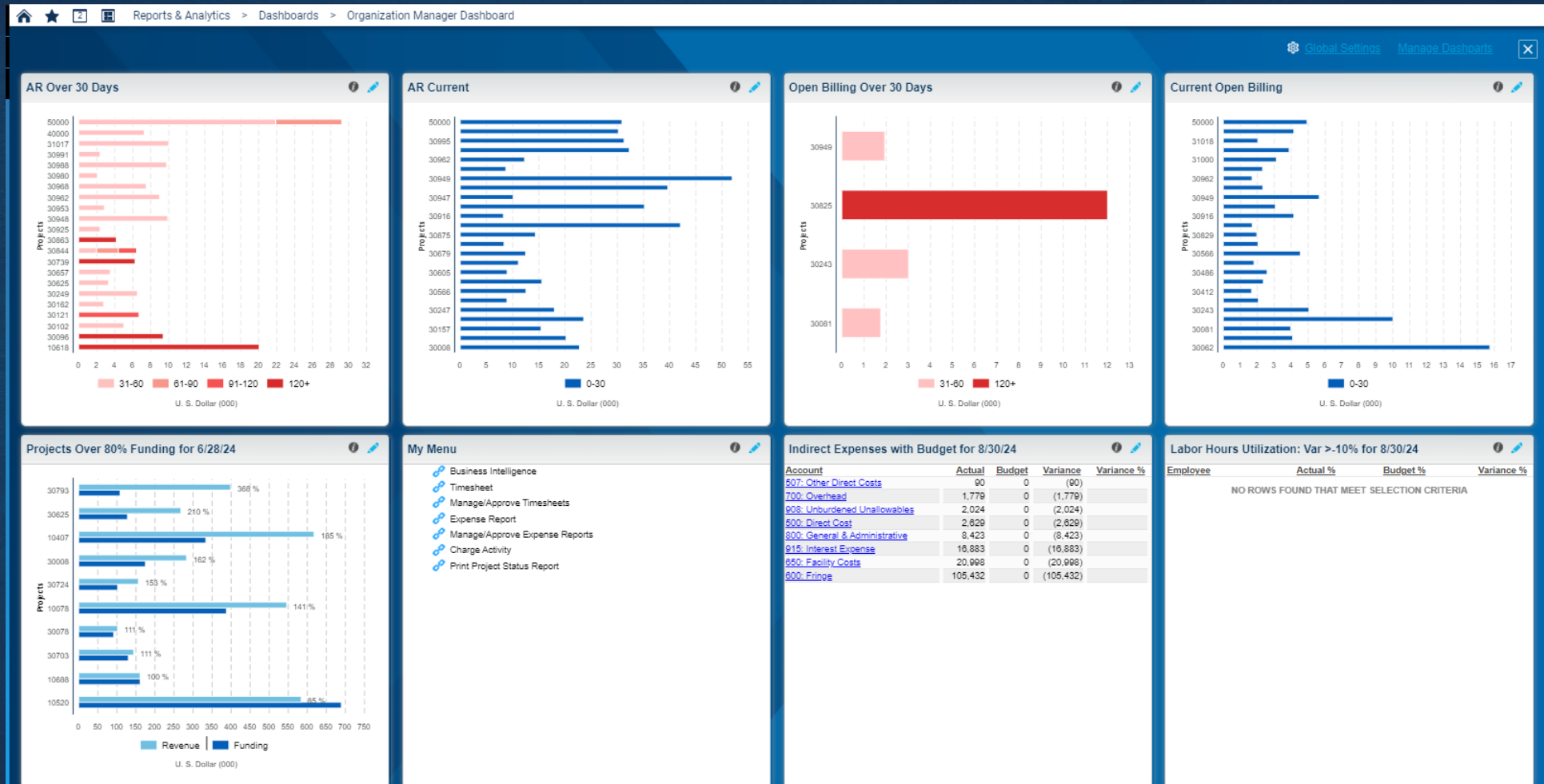
- Access is Controlled by the User Groups in the Administration Area
- BI User Groups are Broken Into 2 Types: Usage and Access
- What Actions a User Can Perform are Controlled by Usage Rights
- What Reports/Information a User Can Pull are Controlled by Access Rights
- Users Can Be Assigned to Multiple Usage and Access User Groups

# BI Security – User Groups

- A User **MUST** be in at Least 1 Usage **AND** Access Group
- Users May be in More than 1 Access Group

USAGE RIGHTS		ACCESS RIGHTS	
User Group ID	Name	User Group ID	Name
CER__ADMIN	CER Cloud Administrator	CER__ACCT_ALL_SECURE	CER Accounting All Secure
CER__ADV	CER Advanced User	CER__ACCTG	CER Accounting
CER__ADV_LITE	CER Advanced Lite	CER__ALL	CER All
CER__CP_ADMIN	CER CP Administrator	CER__AP_SECURE	CER Accounts Payable Secure
CER__DEV	CER Developer	CER__AR_SECURE	CER Accounts Receivable Secure
CER__USER	CER User	CER__CONSUMER	CER Consumer
		CER__CONTRACTS	CER Contracts
		CER__EMPL_SECURE	CER Employee Secure
		CER__EXEC_SECURE	CER Executive Secure
		CER__EXPENSE_SECURE	CER Expense Secure
		CER__GL_SECURE	CER General Ledger Secure
		CER__HR	CER HR
		CER__LABOR_SECURE	CER Labor Secure
		CER__MATERIAL_SECURE	CER Materials Secure
		CER__MATERIALS	CER Materials
		CER__MFG_SECURE	CER Manufacturing Secure
		CER__MM_ALL_SECURE	CER Materials Manufacturing All Secure
		CER__PEOPLE	CER People
		CER__PLAN_PRJ_SECURE	CER Planning (Projects) Secure
		CER__PLAN_PROJ	CER Planning (Projects)
		CER__PM_MGR	CER Project Manager Security
		CER__PROCURE_SECURE	CER Procurement Secure
		CER__PROJ_SECURE	CER Projects Secure
		CER__PROJECTS	CER Projects
		CER__SUBK_SECURE	CER Subcontractor Mgmt Secure
		CER__TE	CER Time & Expense
		CER__TIME_SECURE	CER Time Secure

# DASHBOARDS – You Can Do It!





# Pre-Defined Dashboards

- Seven Dashboards
- Each is Unique
- Available in Applicable Folders

Executive Dashboards

Projects Dashboards

Planning Dashboards

Manufacturing Dashboards

Contracts and Opportunities Dashboards

Finance Manager Dashboard

Organization Manager Dashboard

**EXECUTIVE DASHBOARD**

Pipeline

Backlog

Project Revenue

Project Direct Expense

Project Profit

AR and DSO

Trended Revenue

Expenses

Income Statement

Current vs Prior Year

Labor

Reports & Analytics > Business Intelligence

Welcome! My Content **Team Content** Company Content Get started Recent

Team content / Executive / Dashboards

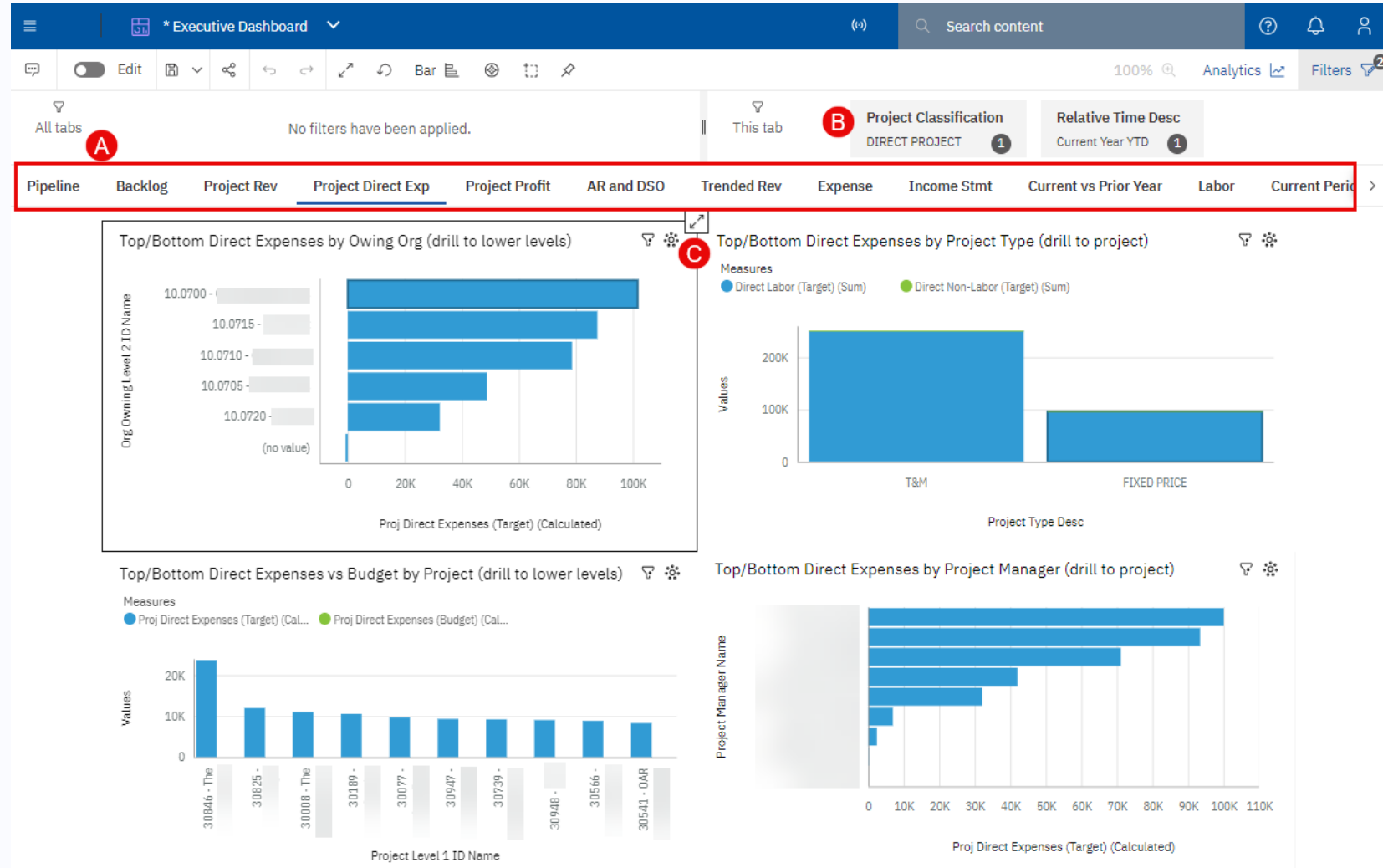
<input type="checkbox"/>	Name	Type	Last Accessed
<input type="checkbox"/>	Executive Dashboard	Dashboard	2/2/2022, 6:01 AM

# Pre-Defined Dashboards

A. Multiple Tabs with Various Views

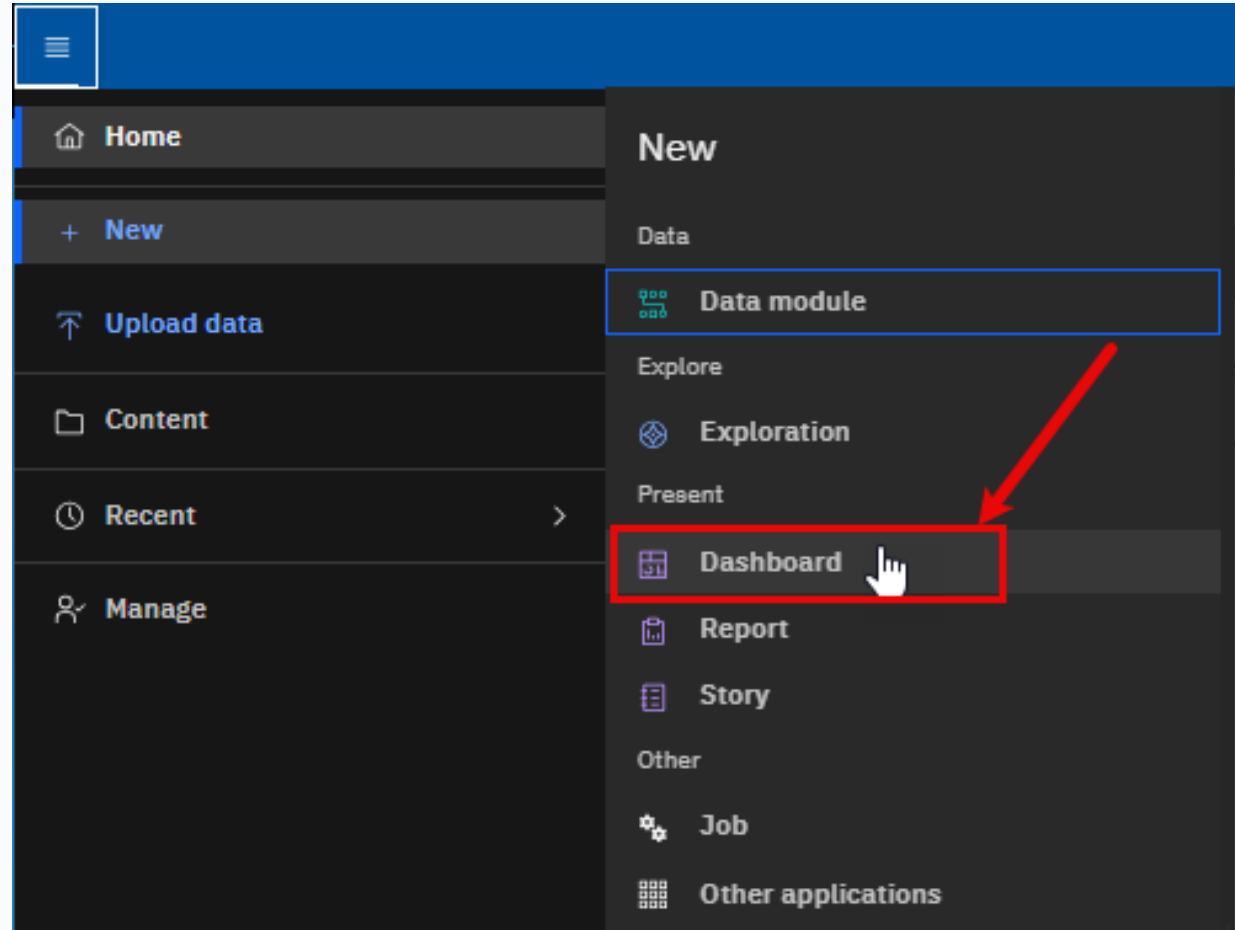
B. Filters Can Be Adjusted

C. Specific Views Can Be Expanded / Drill-Down

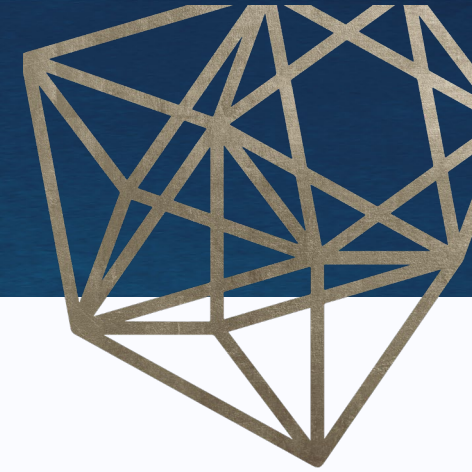


# Custom Dashboards – You Can Do It

- Main Menu
- New
- Dashboard



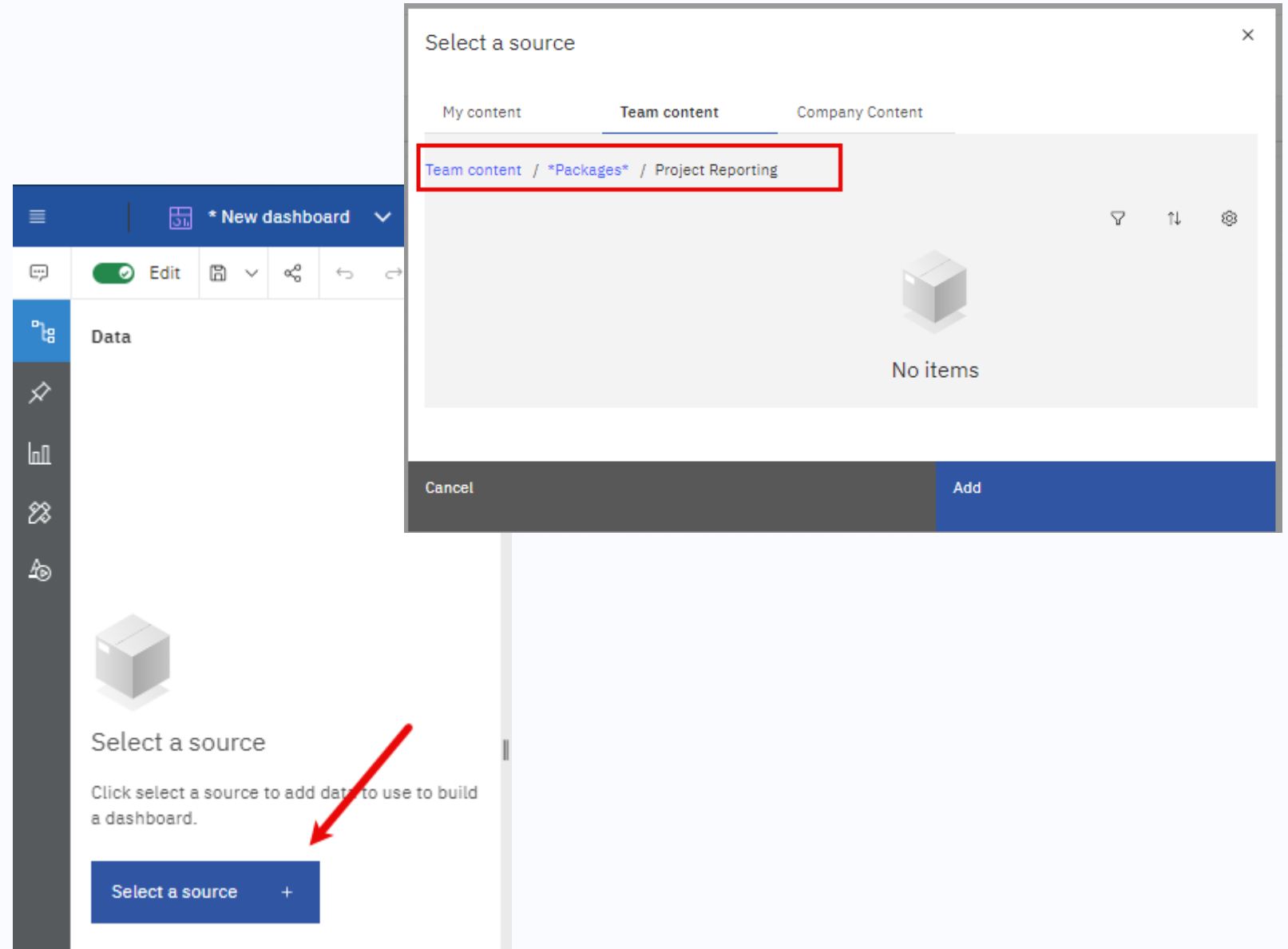
# Select Dashboard Template



The screenshot shows a web application interface for creating a dashboard. At the top, there is a navigation bar with a home icon, a star, a calendar icon, and a grid icon, followed by the text 'Reports & Analytics > Business Intelligence'. On the right side of the navigation bar, there is a 'Fullscreen Mode' button with a close icon. Below the navigation bar, there is a 'Create dashboard' button with a dropdown arrow. To the right of this button is a search bar labeled 'Search content' and icons for help, notifications, and user profile. The main content area is titled 'Create a dashboard' and includes the instruction 'Select a template for your dashboard'. There are two tabs: 'Tabbed' (selected) and 'Infographic'. Below the tabs, there are six dashboard template options arranged in a 2x3 grid. The bottom-right template is highlighted with a blue border and a checkmark icon, and a red arrow points to it from the right. The interface also includes 'Cancel' and 'Create' buttons at the top right of the main content area.

# Select Dashboard Source

**\*\*NOTE:** The folder will appear empty – this IS the package



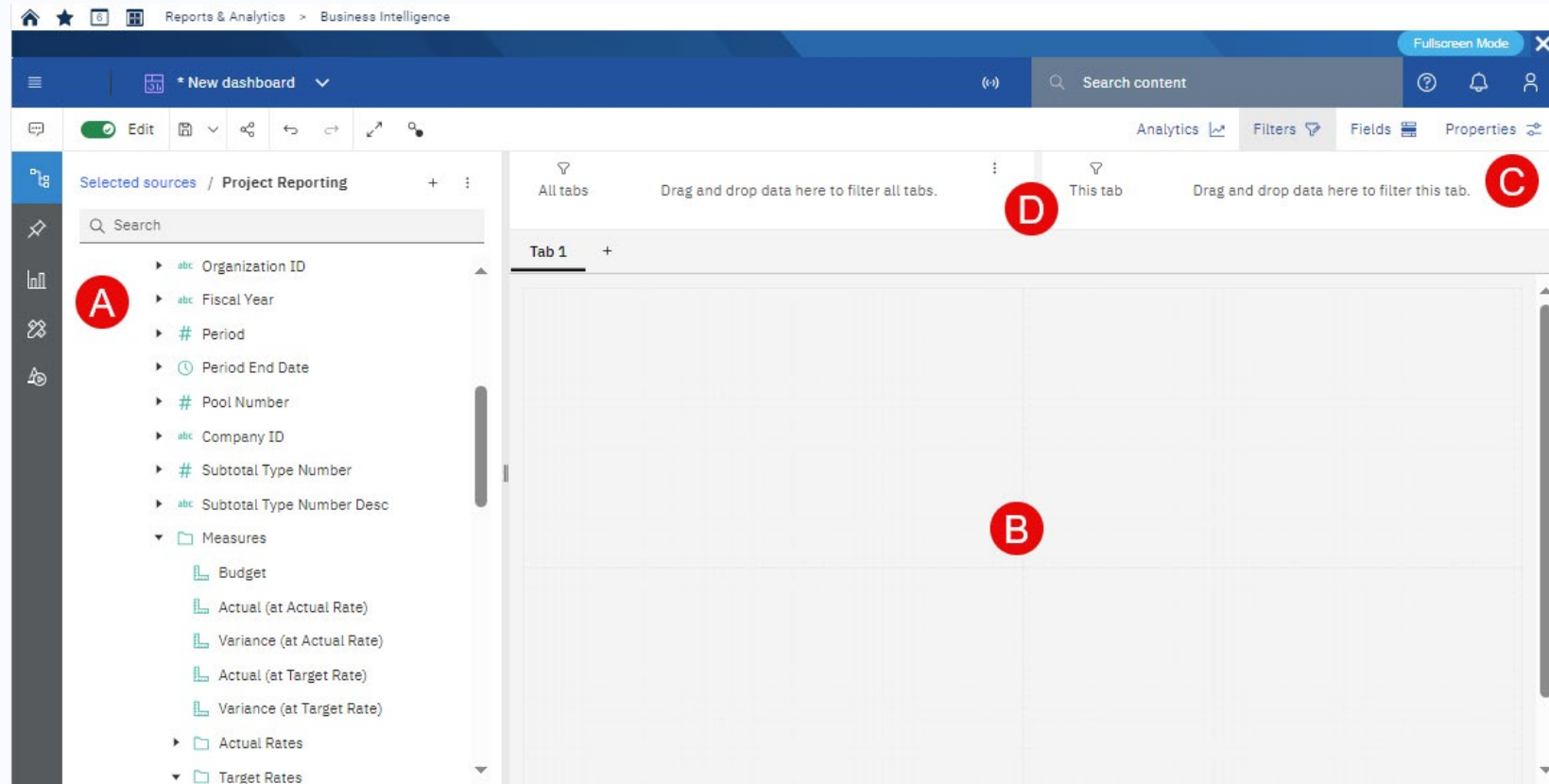
# Dashboard Work Screen

A. Insertable Object

B. Working Area

C. Properties

D. Filters Area



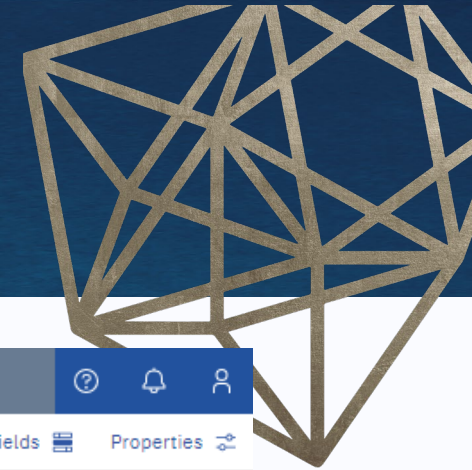
# Adding Data



The screenshot displays a Power BI interface for a dashboard titled '\* New dashboard'. The main area shows a visualization for 'Tab 1' with the title 'Revenue (Target)'. The visualization displays a large value of '386K' with the label 'Revenue (Target)' below it. A red arrow points from the 'Revenue (Target)' measure in the 'Measures' list on the left to the '386K' value on the visualization. The 'Measures' list includes:

- Budget
- Actual (at Actual Rate)
- Variance (at Actual Rate)
- Actual (at Target Rate)
- Variance (at Target Rate)
- Actual Rates
- Target Rates
  - Revenue (Target)
  - Award Fee (Target)
  - Direct Labor (Target)
  - Direct Non-Labor (Target)
  - Gross Profit (Target)
  - Indirect Expenses (Target)
  - Profit (Target)

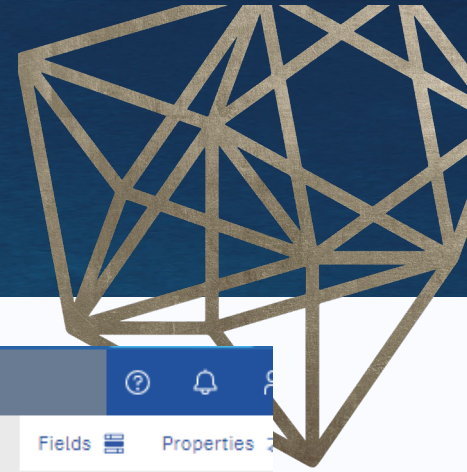
# Changing Data Widget



The screenshot displays a dashboard editor interface. On the left, a 'Visualizations' panel is open, showing a grid of widget options. The 'Bar' widget is highlighted with a red box. A red arrow points from this box to the 'Bar' widget in the 'All visualizations' section of a floating panel. The main dashboard area shows a KPI card for 'Gross Profit (Target)' with a value of '64.7K'.



# Adding Tab Filter



The screenshot shows a Power BI dashboard with the following components:

- Top Bar:** Includes a search bar with the text "Search content" and navigation icons for "Analytics", "Filters", "Fields", and "Properties".
- Left Pane (Selected sources / Project Reporting):** A list of fields is shown, with "Project Classification" highlighted in blue. Other fields include Organization ID, Organization Name, Employee ID, Project Manager Name, Customer ID, Customer Name, Company ID, Company Name, Project Abbrev, Project Type Desc, Active (Y/N), Billable Project (Y/N), Customer P/O ID, Last Requisition ID, and Prime Contract ID.
- Center Pane (Tab 1):** Displays a large KPI card for "Revenue (Target)" with a value of "386K".
- Right Pane (Filters):** Shows a filter for "Project Classification" applied to a visualization. The visualization is a horizontal bar chart titled "Gross Profit (Target) by Project ID".

The chart data is as follows:

Project ID	Gross Profit (Target) (Sum)
700000	~10,000
700000.2.0.0004...	~10,000
700001.01.0001	~10,000
700001.01.0003	~10,000
750000.01.0000	~10,000
800000.01.00	~10,000
BIDP10.23.000.000	~10,000
FACS10.GEN	~10,000
GNAD10.BDV	~10,000
GNAD10.TRN	~10,000
OVHD10.GEN	~10,000

# Widget Properties

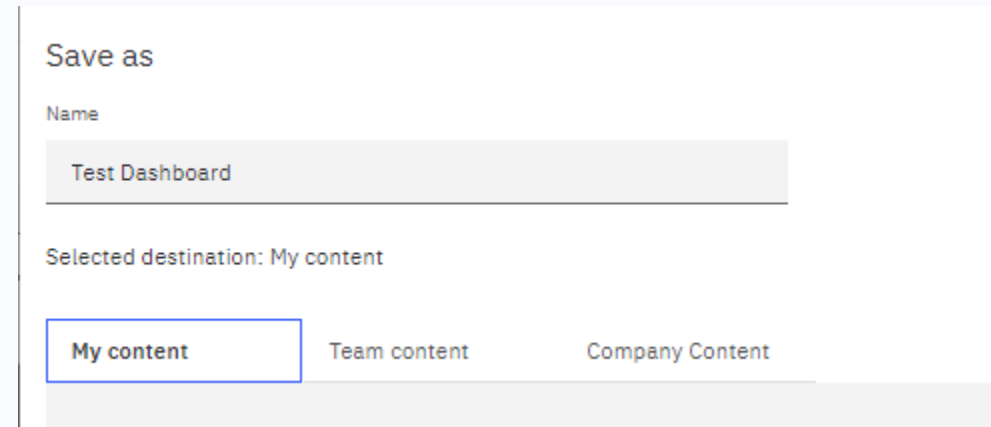
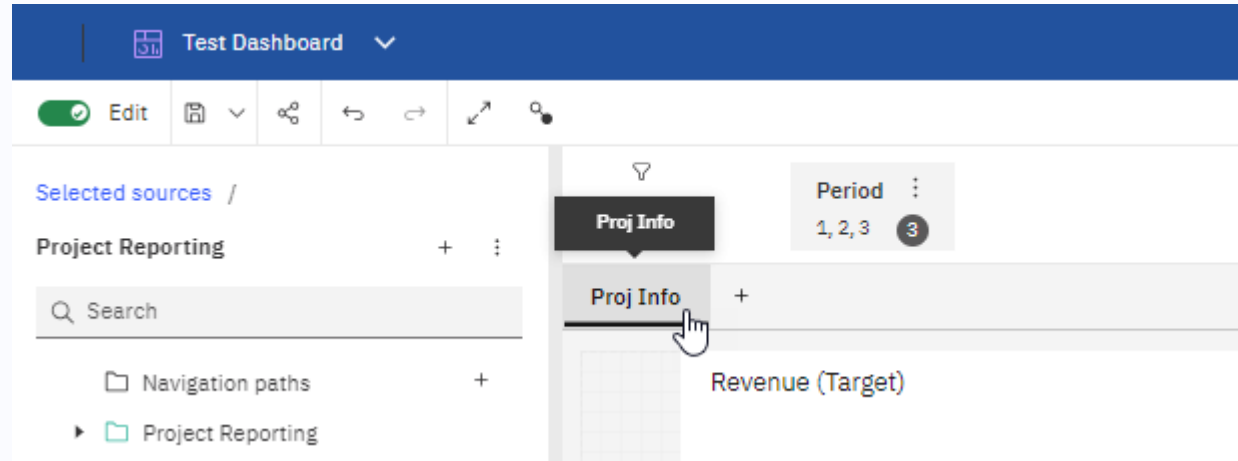
- Chart Axis
- Font and Sizing
- Colors and Formats

The screenshot displays a Power BI dashboard with three main visualizations and a properties panel on the right. The top-left visualization is a KPI card titled "Revenue (Target)" showing a value of "456K". The top-right visualization is a horizontal bar chart titled "Gross Profit (Target) by Project ID". The bottom visualization is a line chart titled "Direct Labor (Target) by Period colored by Project Type Desc", showing data for four periods (1, 2, 3, 4) with two project types: CPFF (purple) and FIXED PRICE (blue). The properties panel on the right is highlighted with a red border and contains the following settings:

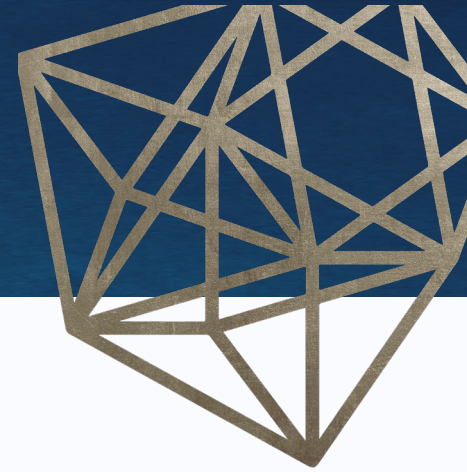
- x-axis\*** (Required field): Period (A)
- Color**: Project Type Desc (C)
- y-axis\*** (Required field): Direct Labor (Target) (B)
- Repeat (column)**: Click or drag data here
- Repeat (row)**: Click or drag data here

# Dashboard - Other

- A. Multiple Tabs
- B. Multiple Sources
- C. Save / Publish



# Custom Dashboards



- **Can Range from Simple to Complex**
- **Simple Dashboards Can be Created With a Minimum Understanding of Costpoint Tables**
- **Proficiency at Creating Dashboards Can be Achieved via Practice and Playing**

# REPORTS YOU DIDN'T KNOW YOU NEEDED

The screenshot shows the Deltek Costpoint Business Intelligence interface. The top navigation bar includes the Deltek Costpoint logo, menu options (FILE, LINE, OPTIONS, PROCESS, HELP), user information (19105.PAMELA.GREER), and project information (CO 1 - FULL PAYROLL). Below the navigation bar is a search bar and a 'Fullscreen Mode' button. The main navigation area contains tabs for 'Welcome!', 'Menu' (highlighted with a red arrow), 'My Content', 'Team Content', 'Company Content', 'Get started', and 'Recent'. The main content area is a grid of report categories and individual report titles.

Accounts Payable	Accounts Receivable	Billing	CRM & Contracts	Costpoint Administration
1099 Exceptions	Accounts Receivable Aging	Aged Open Billing Detail	Contract Backlog Report	Effective User Rights
Corpay Payments	Customer Master Information	Milestone Invoice	Contract Brief	User Group Rights
Vendor Employee		Pre-Bill Report	Contract FAR/Supplement Report	Data Dictionary
Vendor History by EEOC Classification		Standard Invoice with Backup	Contract Vehicle Report	
Vendor Master (Form)		Unbilled Analysis	Customer Inquiry	
Vendor Master (List )		Unposted Invoice	Opportunity Current Pipeline Report	
Corpay Portal Vendor Listing		Zero Rate Billing Exception Report	Opportunity Days Open Report	
		Accounts Receivable Aging	Opportunity Win/Loss Report	
			Contracts Dashboard	
			Opportunity Dashboard	
Employee	Executive	Expense	General Ledger	Human Resources
Attrition and Retention	Executive Dashboard	Expense Charge Activity Report	Account List	EEO-1 Report
Employee Basic Information	Org Mgr CP Performance Analytics	Expense Resource Activity Report	Balance Sheet	Employee Benefits Profile
Employee Information	Accounts Receivable Aging		Cash Forecast	VETS-4212
New Hire / Termination	Aged Open Billing Detail		General Ledger Detail	

# Reports You Didn't Know You Needed



Accounts Payable Aging



General Ledger Detail



Project Status Report



Labor utilization

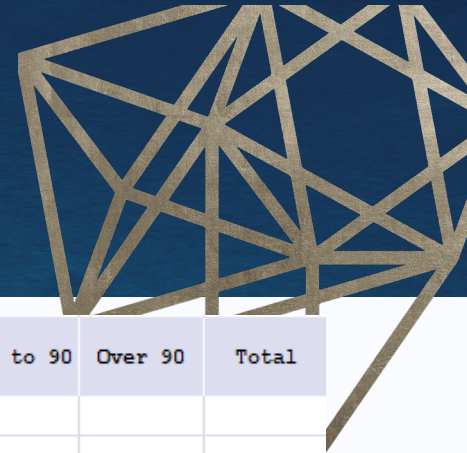


Project Revenue Summary with backlog



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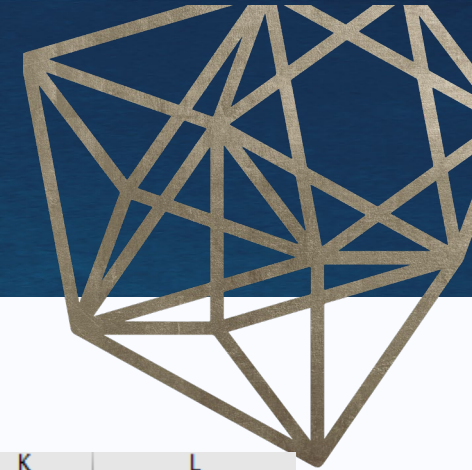
# CP - Open Accounts Payable



	Voucher		Current Status	Invoice	Invoice Date	Due Date	Current	1 to 30	31 to 60	61 to 90	Over 90	Total
32												
33												
34	Account:	210-010-101 - Accounts Payable - Trade										
35		Organization:	10.10 - Company 10 - Division 1									
36	103		HOLD	123855	01/26/23	01/26/23	0.00	0.00	0.00	0.00	2,500.00	2,500.00
37	104		HOLD	JAN2023	01/31/23	03/02/23	0.00	0.00	0.00	0.00	700.00	700.00
38	110		HOLD	JAN2023	01/27/23	01/27/23	0.00	0.00	0.00	0.00	141.00	141.00
39	111		HOLD	JAN2023	01/27/23	02/26/23	0.00	0.00	0.00	0.00	450.00	450.00
40	112		HOLD	01.15.2023 PR	01/15/23	01/15/23	0.00	0.00	0.00	0.00	14,750.18	14,750.18
41	113		HOLD	01.26.2023 PR	01/26/23	01/26/23	0.00	0.00	0.00	0.00	14,750.18	14,750.18
42	115		PAID	TEST123	01/29/24	02/28/24	596.33	0.00	0.00	0.00	0.00	596.33
43	Subtotal for 10.10:		596.33	0.00	0.00	0.00	33,291.36	33,887.69				
44												
45	Subtotal for 210-010-101:		596.33	0.00	0.00	0.00	33,291.36	33,887.69				
46												

**Costpoint – Accounting > Accounts Payable > Accounts Payable Reports/Inquiries > “Print Open Accounts Payable Report”**

# BI – Accounts Payable (Excel)

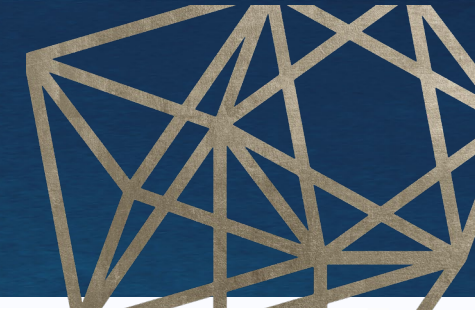


	A	B	C	D	E	F	G	H	I	J	K	L
1												
2	Voucher	Pay Vendor Name	Pay Vendor ID	Current Status	Invoice	Invoice Date	Due Date	Current	31 to 60	61 to 90	Over 90	Total Amount
3												
4	103	BPETERSONDESIGN	10BPET1	HOLD	123855	01/26/2023	01/26/2023	0.00	0.00	0.00	2,500.00	2,500.00
5	104	CARPENTER & PATER	10CARP1	HOLD	JAN2023	01/31/2023	03/02/2023	0.00	0.00	0.00	700.00	700.00
6	110	AMERICAN SAVINGS BANK	10AMER2	HOLD	JAN2023	01/27/2023	01/27/2023	0.00	0.00	0.00	141.00	141.00
7	111	AT&T	10ATT1	HOLD	JAN2023	01/27/2023	02/26/2023	0.00	0.00	0.00	450.00	450.00
8	112	INSPERITY	10INSP1	HOLD	01.15.2023 PR	01/15/2023	01/15/2023	0.00	0.00	0.00	14,750.18	14,750.18
9	113	INSPERITY	10INSP1	HOLD	01.26.2023 PR	01/26/2023	01/26/2023	0.00	0.00	0.00	14,750.18	14,750.18
10	118	IBM EURO	10IBM	HOLD	1234	04/15/2024	05/15/2024	0.00	0.00	0.00	10,900.00	10,900.00
11	119	IBM EURO	10IBM	HOLD	EXAMPLE2	03/05/2024	04/04/2024	0.00	0.00	0.00	10,870.00	10,870.00
12												
13	105	DELL INC	10DELL1	HOLD	23-45234	01/17/2023	01/17/2023	0.00	0.00	0.00	2,300.00	2,300.00
14	106	DELUXE BUSINESS	10DELU1	HOLD	R9786	01/23/2023	01/23/2023	0.00	0.00	0.00	107.00	107.00
15	109	ALPINE PROP SVCS	10ALPI1	HOLD	JAN2023	01/01/2023	01/01/2023	0.00	0.00	0.00	3,000.00	3,000.00
16	120	DELUXE BUSINESS	10DELU1	HOLD	03.2024INVOICE	04/05/2024	03/22/2024	0.00	0.00	0.00	660.00	660.00
17	Total for Report							0.00	0.00	0.00	61,128.36	61,128.36

Business Intelligence > Team Content / Accounts Payable / “Print Accounts Payable Report”



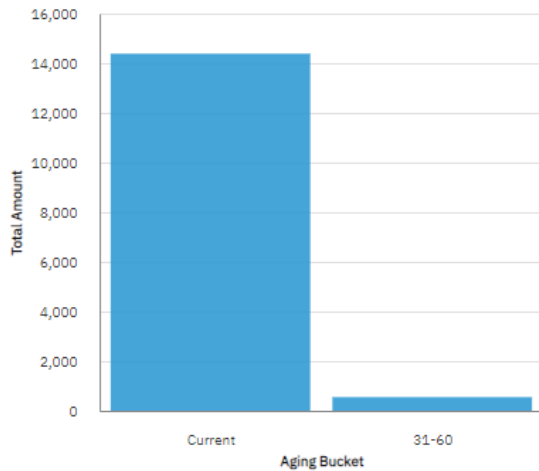
# Open Accounts Payable (HTML)



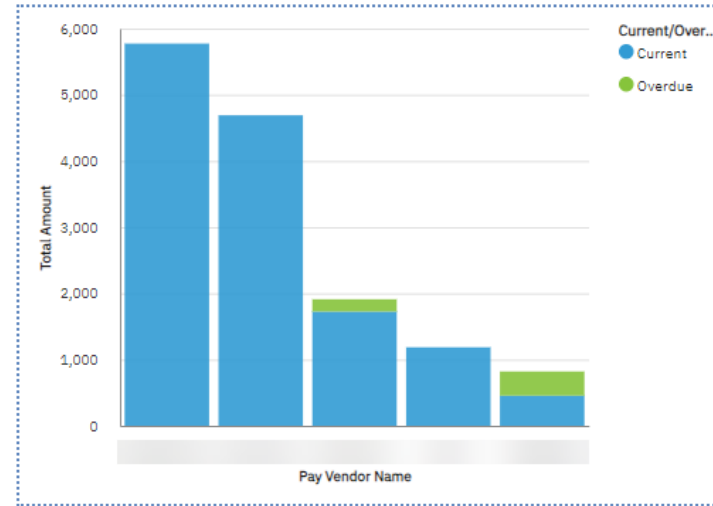
## Accounts Payable Aging

CO 1 - FULL PAYROLL for the Period Ending 04/26/2024

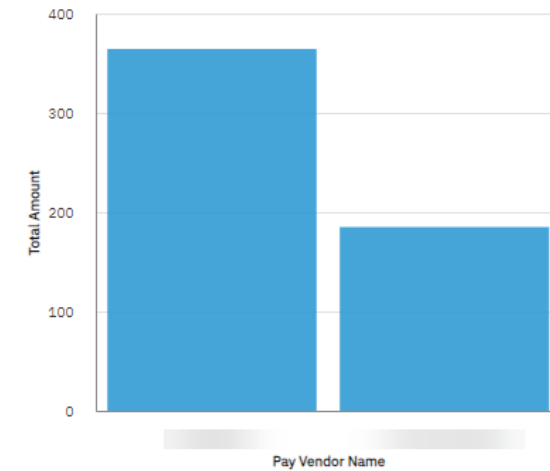
Open A/P by Aging Bucket



Top 5 Pay Vendors by Total Amount Due

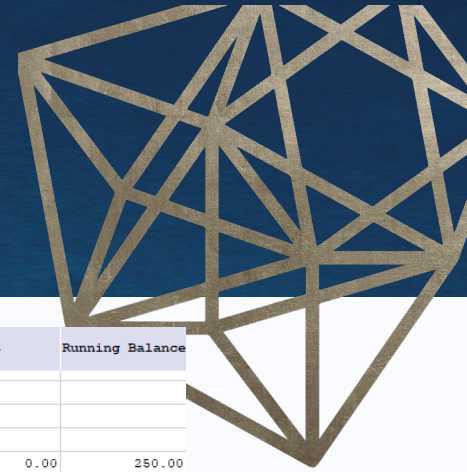


Top Five Pay Vendors by Overdue Amount



Voucher	Pay Vendor Name	Pay Vendor ID	Current Status	Invoice	Invoice Date	Due Date	Current	31 to 60	61 to 90	Over 90	Total Amount
Account: 210-010-101 - Accounts Payable - Trade											
Organization: 10.10 - Company 10 - Division 1											
103	BPETERSONDESIGN	10BPET1	HOLD	123855	01/26/2023	01/26/2023	0.00	0.00	0.00	2,500.00	2,500.00
104	CARPENTER & PATER	10CARP1	HOLD	JAN2023	01/31/2023	03/02/2023	0.00	0.00	0.00	700.00	700.00
110	AMERICAN SAVINGS BANK	10AMER2	HOLD	JAN2023	01/27/2023	01/27/2023	0.00	0.00	0.00	141.00	141.00
111	AT&T	10ATT1	HOLD	JAN2023	01/27/2023	02/26/2023	0.00	0.00	0.00	450.00	450.00
112	INSPERITY	10INSP1	HOLD	01.15.2023 PR	01/15/2023	01/15/2023	0.00	0.00	0.00	14,750.18	14,750.18

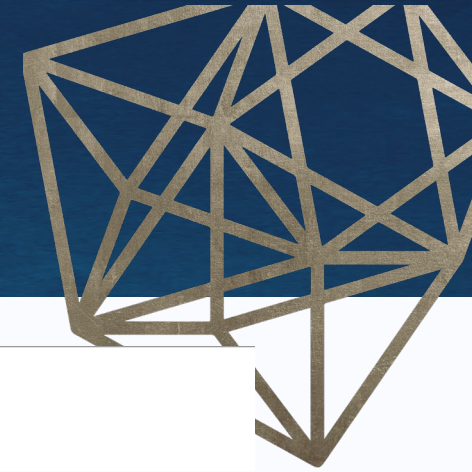
# CP - General Ledger Detail



Pd	Sub	Jnl	Seq	Project	Transaction Description	Debit	Credit	Running Balance
Account: 503-300-510 Direct MI&E								
Organization: 10 Company 10								
		Beginning Balance				0.00		
	1	1	AJE	3	800000.01.TV		250.00	250.00
	2	1	AJE	1	800000.01.TV		250.00	500.00
	3	1	AJE	1	800000.01.TV		250.00	750.00
	4	1	AJE	1	800000.01.TV		250.00	1,000.00
Ending Balance: 503-300-510 Direct MI&E						1,000.00	0.00	####
	10	Company 10						
Account: 503-300-512 Direct Airfare								
Organization: 10 Company 10								
		Beginning Balance				0.00		
	1	1	AJE	3	800000.01.TV		250.00	250.00
	2	1	AJE	1	800000.01.TV		250.00	500.00
	3	1	AJE	1	800000.01.TV		250.00	750.00
	4	1	AJE	1	800000.01.TV		250.00	1,000.00
Ending Balance: 503-300-512 Direct Airfare						1,000.00	0.00	####
	10	Company 10						
Account: 503-300-513 Direct Auto Rental								
Organization: 10 Company 10								
		Beginning Balance				0.00		
	1	1	AJE	3	800000.01.TV		700.00	700.00
	2	1	AJE	1	800000.01.TV		700.00	1,400.00
	3	1	AJE	1	800000.01.TV		700.00	2,100.00
	4	1	AJE	1	800000.01.TV		700.00	2,800.00
Ending Balance: 503-300-513 Direct Auto Rental						2,800.00	0.00	####
	10	Company 10						
Account: 503-300-514 Direct Hotel								
Organization: 10 Company 10								

**Costpoint – Accounting > General Ledger > General Ledger Reports/Inquiries > “Print General Ledger Detail Report”**

# BI – General Ledger Detail



General Ledger Detail																				
Company: 1 - CO 1 - FULL PAYROLL																				
Period 1 to Period 4 Subperiod 1																				
Pd	SubPd	Posting Seq No	ID Name	Project ID Name	Voucher No	ID Type Desc	PO No	JE Code	JE No	Check No	Cash Receipt No	Cash Receipt Date	Invoice ID	T/S Date	GLC	PLC	Time Stamp	Trans Desc	Hours	Amount
Account: 503-300-510 - Direct MI&E																				
Beginning Balance: 0																				
Prior Period: 0																				
<b>Organization: 10.10.0500 - CO 10 Direct</b>																				
4	1	1		800000.01.TV - OY1 Travel		All AJE's		AJE	1								04/06/2024 5:01 PM	Non-Lbr Testing	0.00	250.00
2	1	1		800000.01.TV - OY1 Travel		All AJE's		AJE	1								04/06/2024 5:00 PM	Non-Lbr Testing	0.00	250.00
1	1	3		800000.01.TV - OY1 Travel		All AJE's		AJE	3								04/06/2024 5:00 PM	Non-Lbr Testing	0.00	250.00
3	1	1		800000.01.TV - OY1 Travel		All AJE's		AJE	1								04/06/2024 5:01 PM	Non-Lbr Testing	0.00	250.00
Total for Organization - 10.10.0500 - CO 10 Direct :																				
0.00 1,000.00																				
Total for Account 503-300-510 - Direct MI&E :																				
0.00 1,000.00																				
Account: 503-300-512 - Direct Airfare																				
Beginning Balance: 0																				
Prior Period: 0																				
<b>Organization: 10.10.0500 - CO 10 Direct</b>																				
2	1	1		800000.01.TV - OY1 Travel		All AJE's		AJE	1								04/06/2024 5:00 PM	Non-Lbr Testing	0.00	250.00
1	1	3		800000.01.TV - OY1 Travel		All AJE's		AJE	3								04/06/2024 5:00 PM	Non-Lbr Testing	0.00	250.00
3	1	1		800000.01.TV - OY1 Travel		All AJE's		AJE	1								04/06/2024 5:01 PM	Non-Lbr Testing	0.00	250.00
4	1	1		800000.01.TV - OY1 Travel		All AJE's		AJE	1								04/06/2024 5:01 PM	Non-Lbr Testing	0.00	250.00
Total for Organization - 10.10.0500 - CO 10 Direct :																				
0.00 1,000.00																				
Total for Account 503-300-512 - Direct Airfare :																				
0.00 1,000.00																				
Account: 503-300-513 - Direct Auto Rental																				
Beginning Balance: 0																				
Prior Period: 0																				
<b>Organization: 10.10.0500 - CO 10 Direct</b>																				

Business Intelligence > Team Content / General Ledger / Reports / “General Ledger Detail”

# Project Status Report

Business Intelligence >  
Team Content / Projects  
/ "Project Status  
Report"

## Project Status Report

System: RGCIDEMOPARTNER-19105-CONFIG

Company: 1 CO 1 - FULL PAYROLL  
By Project

For Fiscal Year 2024 Period 4 Subperiod 1

Project: 800000.01.OD OY1 ODCs

				ITD Amounts (w/o Future Mods)	Total Amounts (All Mods)	
Project ID	<a href="#">800000.01.OD</a>	Active (Y/N)	Active	Project Value Fee	37,037.04	37,037.04
Project Name	<a href="#">OY1 ODCs</a>	Project Classification	DIRECT PROJECT	Project Value Cost	462,962.96	462,962.96
Organization ID	<a href="#">10.10.0500</a> - CO 10 Direct	Project Type Desc	CPFF	Project Value Total Amount	500,000.00	500,000.00
Customer ID	BCOMPANY - B COMPANY	Period of Performance:	01/01/23 - 12/31/23	Fee Funded	37,037.04	37,037.04
Prime Contract ID		Project Manager Name	Stroud, Heather	Cost Funded	462,962.96	462,962.96
Subcontractor ID		Rate Type:	Target	Total Funded	500,000.00	500,000.00
P/O Number		Project Budget Rvsn ID		Amount Billed		0.00
				Balance Due Amount		0.00
				Retainage Amount		0.00

Account Name	Prior Year Actual	Current Period Actual	Year To Date Actual	Contract To Date Actual
Revenue	0.00	2,151.60	11,741.40	11,741.40
<b>Total Revenue</b>	<b>0.00</b>	<b>2,151.60</b>	<b>11,741.40</b>	<b>11,741.40</b>
<a href="#">Vend Lab - Company Site</a>	0.00	700.00	2,800.00	2,800.00
<b>Total Direct Labor</b>	<b>0.00</b>	<b>700.00</b>	<b>2,800.00</b>	<b>2,800.00</b>
<a href="#">Direct Freight Costs</a>	0.00	950.00	5,900.00	5,900.00
<a href="#">Other Equipment</a>	0.00	250.00	1,750.00	1,750.00
<b>Total Direct Non-Labor</b>	<b>0.00</b>	<b>1,200.00</b>	<b>7,650.00</b>	<b>7,650.00</b>
G&A	0.00	190.00	1,045.00	1,045.00
<b>Total Indirect Expenses</b>	<b>0.00</b>	<b>190.00</b>	<b>1,045.00</b>	<b>1,045.00</b>
<b>Total Expense</b>	<b>0.00</b>	<b>2,090.00</b>	<b>11,495.00</b>	<b>11,495.00</b>
Profit \$	0.00	61.60	246.40	246.40
Profit %		2.95%	2.14%	2.14%

	Prior Year	Subperiod	Current Period	Year To Date	Contract To Date
Labor Hours	0.00	0.00	0.00	0.00	0.00
Units	0.00	0.00	0.00	0.00	0.00

# Labor Utilization



## Labor Utilization

1 - Wimbledon

Employee Name	GLC Description	Period to Date				Year to Date			
		Direct Hours	Indirect Hours	Total Hours	DL Util	Direct Hours	Indirect Hours	Total Hours	DL Util
<b>10.000 - Costpoint</b>									
Agassi, Andre	ALL	47.25	123.50	170.75	27.67%	303.50	405.50	709.00	42.81%
Borg, Bjorn	ALL	80.50	73.25	153.75	52.36%	375.00	295.00	670.00	55.97%
Evert, Chris	ALL	110.00	43.00	153.00	71.90%	527.50	135.50	663.00	79.56%
Court, Maraget	ALL	88.50	88.50	177.00	50.00%	461.50	264.75	726.25	63.55%
Djokovic, Novak	ALL	68.50	66.50	135.00	50.74%	409.50	236.00	645.50	63.44%
Employee Count: 5									
Subtotal for 10.000 - Costpoint		394.75	394.75	789.50	50.00%	2,077.00	1,336.75	3,413.75	60.84%
Employee Count: 5									
Total		394.75	394.75	789.50	50.00%	2,077.00	1,336.75	3,413.75	60.84%

Page 1 of 1

**Business Intelligence > Team Content / Labor / “Labor Utilization”**

# Labor Utilization

How does the system know what to treat as direct?

Include:

- None
- Leave Accounts
- Part-Time Employees
- Temporary Employees

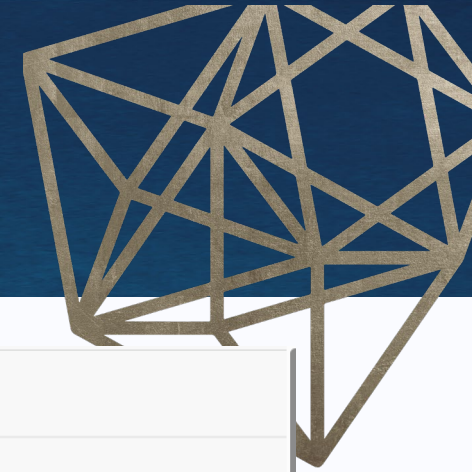
[Select all](#) [Deselect all](#)

Include as Direct Hours: \*

- None
- Bid & Proposal
- Common Inv
- Direct Project
- Indirect
- Inter-Co Multi
- Inter-Company
- IR & D
- Work In Process

[Select all](#) [Deselect all](#)

# Project Revenue Summary with Backlog



## Project Revenue Summary with Backlog

Company: \* 1 CO 1 - FULL PAYROLL

Fiscal Year: \* 2024

Period: \* 4

Subperiod: \* 1

Primary Group: \* Project

Revenue Level: \*  Yes  No

Project Level: Transaction Level

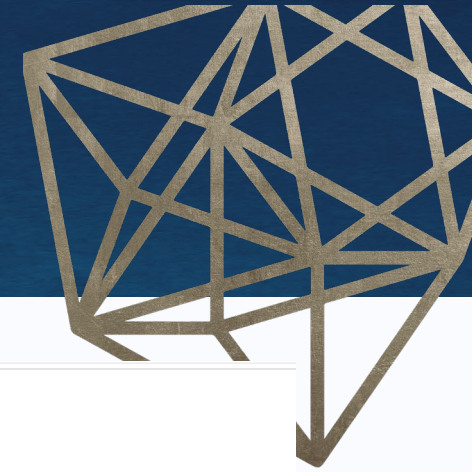
Organization Level: Transaction Level

Active projects only? Yes

Billable projects only? Yes

Columns to Display:	Subperiod	Period	Year to Date	Inception to Date	Other
<input type="checkbox"/> Actual Subperiod Revenue	<input type="checkbox"/> Actual Period Revenue	<input type="checkbox"/> Actual YTD Revenue	<input type="checkbox"/> Actual ITD Revenue	<input type="checkbox"/> Total Contract Value (All Mods)	
<input type="checkbox"/> Actual Subperiod Prior Year Revenue	<input type="checkbox"/> Actual Period Prior Year Revenue	<input type="checkbox"/> Actual YTD Prior Year Revenue	<input type="checkbox"/> Actual ITD Award Fee	<input type="checkbox"/> Total Contract Value Award Fee (All Mods)	
<input type="checkbox"/> Actual Subperiod Revenue w/ Prior Year Rev	<input type="checkbox"/> Actual Period Revenue w/ Prior Year Rev	<input type="checkbox"/> Actual YTD Revenue w/ Prior Year Rev	<input type="checkbox"/> Actual ITD Revenue w/Award Fee	<input type="checkbox"/> Actual ITD Contract Value Backlog	
<input type="checkbox"/> Actual Subperiod Award Fee	<input type="checkbox"/> Actual Period Award Fee	<input type="checkbox"/> Actual YTD Award Fee	<input type="checkbox"/> Actual ITD Costs	<input type="checkbox"/> Actual % Complete of Contract Value	
<input type="checkbox"/> Actual Subperiod Revenue w/Award Fee	<input type="checkbox"/> Actual Period Revenue w/Award Fee	<input type="checkbox"/> Actual YTD Revenue w/Award Fee	<input type="checkbox"/> Actual ITD Cost of Money	<input type="checkbox"/> Total Funded Value (All Mods)	

# Project Revenue Summary with Backlog



## Project Revenue Summary with Backlog

1 CO 1 - FULL PAYROLL

Project Number	Project Name	Total Contract Value (All Mods)	Total Funded Value (All Mods)	ITD Billed Amount	Open Receivable Amount	Actual ITD Revenue	Actual ITD Costs	Actual ITD Profit	Actual YTD Revenue	Actual YTD Costs	Actual YTD Profit
Projects											
<a href="#">700000</a>	Example A	9,990,000.00	890,000.00	14,500.00	14,500.00	82,948.50	43,300.00	39,648.50	82,948.50	43,300.00	39,648.50
<a href="#">700001</a>	SCA Contract T&M	6,000,000.00	2,500,000.00	0.00	0.00	178,712.50	82,550.00	96,162.50	178,712.50	82,550.00	96,162.50
<a href="#">750000.01</a>	Multi currency CLIN1	1,200,100.00	250,100.00	0.00	(1,376.15)	100,000.00	25,301.18	74,698.82	100,000.00	25,301.18	74,698.82
<a href="#">750000.02</a>	Multi currency CLIN2	1,100,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<a href="#">750000.03</a>	Tennis Court Bldg CLIN 3	200,000.00	2,000,002.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<a href="#">750000.04</a>	Tennis Court Bldg CLIN 4	200,000.00	2,000,002.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<a href="#">800000</a>	Example B	7,700,000.04	2,700,000.00	37,500.00	58,361.00	33,394.00	32,050.00	1,344.00	33,394.00	32,050.00	1,344.00
<b>Overall - Total</b>		<b>26,390,100.04</b>	<b>10,340,104.00</b>	<b>52,000.00</b>	<b>71,484.85</b>	<b>395,055.00</b>	<b>183,201.18</b>	<b>211,853.82</b>	<b>395,055.00</b>	<b>183,201.18</b>	<b>211,853.82</b>

**Business Intelligence > Team Content / Projects / Reports / “Project Revenue Summary with Backlog”**



# Reports You Didn't Know You Needed



Accounts Payable Aging



General Ledger Detail



Project Status Report



Labor utilization



Project Revenue Summary with backlog

# Want To Or Not – Rate Adjustments Invoices

- **FAR 42.705 – Within 120 days after settlement of final rates**
- **Does NOT matter who owes whom**
- **Need to Document final amounts even if over contract value and/or funding**

# Rate Adjustment Invoices



## 1. Verify Setup

- How burdening – YTD vs Period
- Allow Consolidated

## 2. Update Provisional to Actual

## 3. Calculate Retroactive Bill

- Rate Adjustments
- Labor Rate Adjustments

## 4. Review Retroactive Worksheet

- Stand-Alone
- Combined w/ Current Billing

## 5. Review / Print Billing

- Send to Customer
- Document, Document, Document

## 6. Post Billing

# Verify Setup

## Project Settings

### Burden Applied Based On:

The screenshot shows a web application interface for configuring project settings. The breadcrumb navigation is: Projects > Project Setup > Project Setup Controls > Configure Project Settings. The main window is titled "Project Settings" and has several tabs: Projects, Project Segment Lengths, Revenue, Pools, Budgeting, Contracts, and IWO. The "Revenue" tab is active. The settings are organized into sections:

- General Settings:**
  - Require Incurred Cost Submission Code for all Projects
  - Validate Project Charging by Organizations
  - Show Period of Performance Warning Message
  - Track Owing Organization History
  - Use Goal Multipliers for Billable Value Calculations
  - Modifications Effective Date \*: Default System Date
  - Validate Modification Descriptions
- Period of Performance Start and End Dates:**
  - Update POP Start Date based on earliest Start Date From \*: All Modifications
  - Update POP End Date based on latest End Date From \*: Only mods with latest effective dates
- Quick Project Defaults:**
  - Owning Organization: [text input]
  - Account Group: [text input]
  - Use Quick Project Templates

At the bottom right of the main window are links for [Revenue Formulas](#) and [Corporate Settings](#). Below this is a secondary window titled "Project Settings > Corporate Settings". In this window, the "Apply Burdening based on \*" dropdown menu is highlighted with a red box and a red arrow pointing to it. The dropdown is currently set to "Year to Date Rates". Below this is a "Top Level Length of the Project" input field with the value "6". A "Close" button is located at the bottom right of the secondary window.

# Verify Setup

## Billing Settings

### Consolidated Standard / Retro Bills

Projects > Billing > Billing Controls > Configure Billing Settings

**Billing Settings**

**Options**

Last Company Wide Invoice No \* INV-00000118511 Last Usage Document No \* DOC-000000000000 **Billing Cycles**  Use Billing Cycles Default MONTH

Enable Project Specific Bill Numbering  Assign Bills to User Groups  Summarize Pools By Pool ID  
 Suppress Detail History  Edit PLC in Open Billing Detail  Allow Cash Receipt Creation in Reverse Previous Bills  
 Include AP Discounts on Invoice  Recalculate Detail Rows  Validate Same Invoice ID in Closed Periods/IWO Project in Reverse Previous Bills

**Billing Defaults**

Remittance REMIT1 Billing Format 1035 Payment Terms NET 30 Sales Tax Code Shipping Method

**1443 Postings**  Delivery Invoices as Net Amount  Progress Bills to GL When Billed

**Cost of Sales Accrual**  Billed  Incurred

**Units Usage User Defined Field Labels**

Numeric Text Date

**ACRN Options**  Enable ACRN Billing  ACRN Warnings With Modifications Changes  Track ACRN Change History

**iRAPT Options** Default Output Location  Enable Project Product Bills for iRAPT

**Consolidated Standard/Retro Billing Options**  Allow Consolidated Standard/Retroactive Bills

**Labels for Print Standard Bills**

Text for Current FY True-Up CY True Up Position of Fiscal Year Code First  
Text for Prior FY True-Up PY True Up Position of Fiscal Year Code Last

**Milestone/Percent Complete Bills**  Allow Percent Complete to Exceed 100% on Individual Lines

Select Billing Formulas

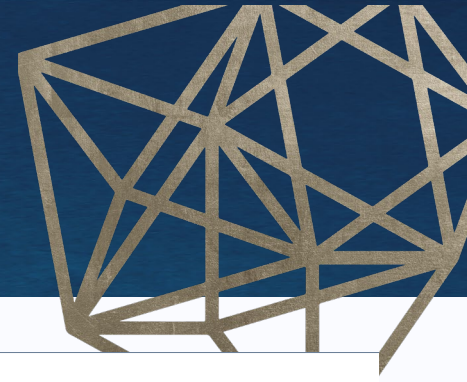
**Consolidated Standard/Retro Billing Options**

Allow Consolidated Standard/Retroactive Bills

**Labels for Print Standard Bills**

Text for Current FY True-Up CY True Up Position of Fiscal Year Code First  
Text for Prior FY True-Up PY True Up Position of Fiscal Year Code Last

# Update Provisional Rates to Actual



- For Annual Rate Update
- Update Each Final Pool
- Copy Period 12 Actual to Provisional Period 12

Projects > Cost and Revenue Processing > Cost Pools > Manage Cost Pools

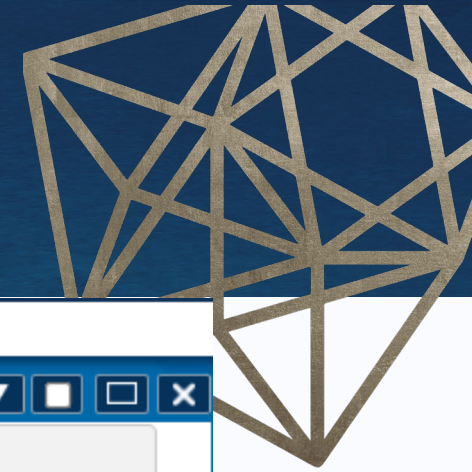
Cost Pools										
Allocation Group *	Allocation Group Description	Fiscal Year *	Sequence Number *	Pool Number *	Pool Name *	Abbreviated Name *	Pool Type	Service Center	Apply Rates to Projects	Unallow
1	Primary Allocation Group	2023	10	10	FRINGE	FRG	FRINGE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1	Primary Allocation Group	2023	50	50	OVERHEAD	OH	OVERHEAD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1	Primary Allocation Group	2023	80	80	G&A	GA	G&A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Pool Cost Pool Base Service Center Pool Rates

Pool Rates								
Period *	Pd Actual	YTD Actual	Pd Target	YTD Target	Pd Provisional	YTD Provisional	Pd Cost of Money	YTD Cost of Money
12	32.980000%	32.980000%	32.000000%	32.000000%	32.980000%	32.980000%	0.000000%	0.000000%
11	32.750000%	32.750000%	32.000000%	32.000000%	32.000000%	32.000000%	0.000000%	0.000000%
10	32.486555%	32.486555%	32.000000%	32.000000%	32.000000%	32.000000%	0.000000%	0.000000%
9	31.978000%	31.978000%	32.000000%	32.000000%	32.000000%	32.000000%	0.000000%	0.000000%
8	31.811100%	31.811100%	32.000000%	32.000000%	32.000000%	32.000000%	0.000000%	0.000000%
7	31.725687%	31.725687%	32.000000%	32.000000%	32.000000%	32.000000%	0.000000%	0.000000%
6	31.680000%	31.680000%	32.000000%	32.000000%	32.000000%	32.000000%	0.000000%	0.000000%

Close

# Calculate Retroactive Bill – Adjustment Only



Projects > Billing > Standard Bills Processing > Calculate Retroactive Bills

Calculate Retroactive Bills [New] [Copy] [Delete] [1 of 1] [New] [Table] [Query]

Parameter ID\* [ ] Description\* [ ]

**Selection Ranges**

	Option	Start	End
Projects	One <b>D</b>	800000	[ ]
Bill Groups	All	[ ]	[ ]
Accounting Period Range		Fiscal Year   Period   Subpd   Ending Date	Fiscal Year   Period   Subpd   Ending Date
		[ ]   [ ]   [ ]   [ ]	<b>B</b> 2023   [ ]   [ ]   [ ]

**Options**

Period for Rates **C** [ 12 ]

Invoice Date\* [ 03/15/2024 ] **E**

Select Calculation Type **A**

Loaded Labor Rates  Indirect Costs

Include Projects with "Final Billing Completed" checked

For Annual Update - **A: Indirect Rates**    **C: Period 12**    **E: Invoice Date**  
**B: Fiscal Year**    **D: Project(s)**

# Calculate Retroactive Bill – Combined

Only Available for Indirect Rate Adjustments

Current Year Adjustment

Or

Prior Year Adjustment

Projects > Billing > Standard Bills Processing > Calculate Standard Bills

Calculate Standard Bills

Parameter ID \* Description \*

Options Withholding Release

Selection Ranges

Option	Start	End
	Fiscal Year * Period * Subpd * Ending Date	
Accounting Period	ONE	
Projects	One	800000
Bill Groups	All	
Billing Cycles	All	

Options

Calculate: Billings

Invoice Date \* 02/15/2024

Include

- Current Activity Only
- Transactions with Zero Bill Rate
- Transactions with Zero Cost Amount
- Transactions with Zero Units Quantity
- Projects with "Final Billing Completed" checked

Processing Options

- Auto-Release On-Hold Items
- Create Zero Retainage and Over-Ceiling Rows
- Create Zero Fee Rows
- Create Zero Discount Rows
- Create Zero Withholding Row
- Create Zero Withholding Release Row

Consolidated Standard/Retro Billing Options

Select Retroactive Bill Calculation Type

None

Indirect costs

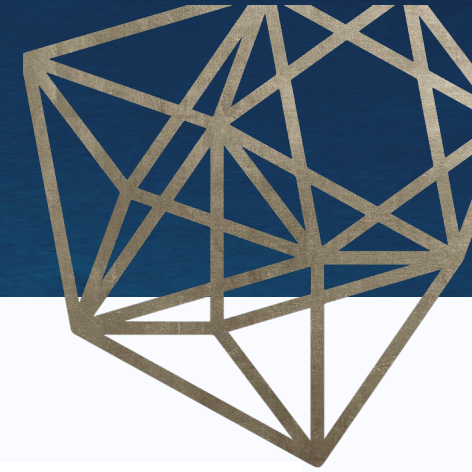
Indirect Costs Retroactive Billing Options

	Fiscal Year	Period For Rates
<input type="checkbox"/> Include Current Fiscal Year		
<input checked="" type="checkbox"/> Include One Prior Fiscal Year	2023	12
<input type="checkbox"/> Include Multiple Prior Fiscal Years (see 'Retro Billing Indirect Costs Fiscal Years' subtask)		

[Retro Billing Indirect Costs Fiscal Years](#) [Percentage to Release Calculation Help](#)



# Retroactive Billing Worksheet



**\*NOTE: This Worksheet does NOT include anything related FEE**

**COMPANY 1 - FULL PAYROLL**  
Retroactive Billing Worksheets

Project Number: 800000.01.LF  
 Project Name: OY1 Labor/Fee  
 Time Period Covered:  
 Starting: FY: 2023 01/01/23  
 Ending: FY: 2023 12/24/23

Description	Original Rate	Approved Rate	Original Amount	Approved Amount	Amount Due
FRINGE	31.999896%	32.979908%	1,483.08	1,528.50	45.42
OVERHEAD	26.400109%	27.925794%	1,223.55	1,294.26	70.71
G&A	11.627123%	11.661869%	1,934.13	1,939.91	5.78
<b>Total Indirect Costs:</b>			<b>4,640.76</b>	<b>4,762.67</b>	<b>121.91</b>

# Print Retroactive Bill

- Combined
- Prior Year Alone

## COMBINED RETRO BILL

	<u>Current Amount</u>
D/L - Company Site	\$4,000.00
Vend Lab - Company S	700.00
<b>TOTAL DIRECT LABOR</b>	<u>\$4,700.00</u>
Direct MI&E	\$250.00
Direct Airfare	250.00
Direct Auto Rental	700.00
Direct Hotel	700.00
Direct Freight Costs	1,650.00
Other Equipment	500.00
<b>TOTAL OTH. DIR. COST</b>	<u>\$4,050.00</u>
<b>FRINGE</b>	
FRINGE	\$1,280.00
PY True Up 2023	45.42
<b>Total FRINGE</b>	<u>\$1,325.42</u>
<b>OVERHEAD</b>	
OVERHEAD	4,224.00
PY True Up 2023	70.71
<b>Total OVERHEAD</b>	<u>\$4,294.71</u>
<b>G&amp;A</b>	
G&A	1,425.40
PY True Up 2023	5.78
<b>Total G&amp;A</b>	<u>\$1,431.18</u>
<b>TOTAL INDIRECTS</b>	<u>\$7,051.31</u>
<b>Fee</b>	
Fee	\$0.00
<b>TOTAL FEE</b>	<u>\$0.00</u>
<b>Invoice Total</b>	<u><u>\$15,801.31</u></u>

## PY RETRO BILL

	<u>Current Amount</u>
FRINGE	\$45.42
OVERHEAD	70.71
G&A	5.78
<b>TOTAL INDIRECTS</b>	<u>\$121.91</u>
<b>Invoice Total</b>	<u><u>\$121.91</u></u>

# Rate Adjustment Invoices

- **If Not Submitting – DOCUMENT**
- **If Over Contract Value – DOCUMENT**
- **If Over Funding Value – DOCUMENT**
  
- **Don't Forget to Post**

# CRM & Contracts – Compliance & Efficiencies

---

- **Quickly identify CAS/modified CAS contracts**
- **Capture NAICS Codes by contract**
- **Automate flow down of required Clauses from Contract to sub/PO**
- **Print Contract Brief from Business Intelligence**
- **Track Contract Close Outs**

# CAS Covered and Modified CAS Contracts

CRM & Contracts > Contracts > Manage Contracts

**Manage Contracts** [New] [Copy] [Delete] [7 of 8 Existing] [Table] [Find] [Query] [Smart Summary]

Contract ID: CNTR-000000000000007 Name: Tennis Court Building  
Costpoint Opportunity:  Main Opportunity ID: OPP-000000000000009 Name: Tennis court building  
Prime Contract No: 14567904515984 Name:   
Record Status: Active Average Rating: 0%  Exclude from Reports  Use Planning

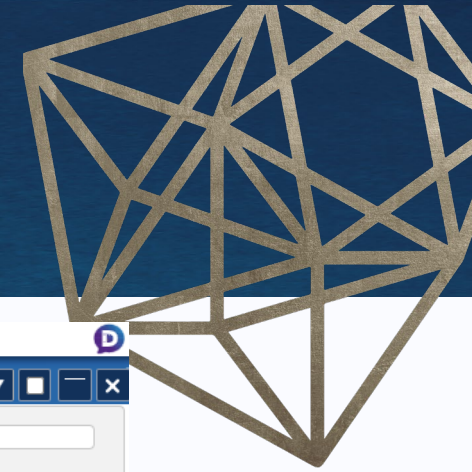
**General** | Classification | **Contract Info** | Team | Customers/Contacts | Dates | Modifications | Supplier/Vendor Rating | Performance Assessment | Contract Close Out

Has copy of proposal been received? *	Yes	Is this a Commercial Contract? *	No
Has executed copy of contract been received? *	Yes	Is this an 8A Contract? *	No
Is this a GSA Order? *	No	<b>CAS Covered? *</b>	No
If yes, provide schedule and SIN info in GSA subtask		Is the Service Contract Act Required? *	No
Is this a Time & Materials or Fixed Price Contract? *	T&M	Is the Davis Bacon Act Required? *	No
If T&M, provide schedule of negotiated rates in the Labor Rates subtask of the Team tab.		Any special facility requirements (e.g. SCIF)? *	No
DPAS Purchasing Rating		Does contract have restrictive/special requirements for subcontractors? *	No
Does contract contain a level of effort clause? *	No	If yes, identify relevant portions of contract	
If yes, identify limitations specified in contract			
Any Government Furnished Equipment (GFE)? *	Yes	Is Facilities Capital Cost of Money allowable on contract? *	No
If yes, provide information on Government Furnished Equipment		If yes, provide information on FCCM (COM), including rates	
Does contract contain ceilings on the indirect rates? *	No	If yes, identify the ceiling rates	

CMMC Requirement

[GSA Schedule](#) **[FAR Clauses/Provisions](#)** [Supplemental Regulations](#) [Import FAR/Supplemental Regulation Files](#) [Contract Deliverables](#)

# Capture NAICS code by Contract



CRM & Contracts > Contracts > Manage Contracts

**Manage Contracts** [New] [Copy] [Delete] [7 of 8 Existing] [Table] [Find] [Query] [Smart Summary]

Contract ID: CNTR-000000000000007 Name\*: Tennis Court Building  
Costpoint Opportunity:  Main Opportunity ID: OPP-000000000000009 Name: Tennis court building  
Prime Contract No: 14567904515984 Name:   
Record Status\*: Active Average Rating: 0%  Exclude from Reports  Use Planning

**Classification** | General | Contract Info | Team | Customers/Contacts | Dates | Modifications | Supplier/Vendor Rating | Performance Assessment | Contract Close Out

**SBU/Industry - Check all that apply**

<input type="checkbox"/> Audit	<input type="checkbox"/> Global Security & Justice
<input type="checkbox"/> Energy	<input type="checkbox"/> Healthcare
<input type="checkbox"/> Environmental & Transportation	<input type="checkbox"/> International
<input type="checkbox"/> Defense & Intelligence	<input type="checkbox"/> State & Local GPS
<input type="checkbox"/> Financial Services	<input type="checkbox"/> State & Local Non-GPS
<input type="checkbox"/> Other	

**Non-Disclosure Agreement (NDA)**

NDA Required NDA Signed: [ ]

**Security**

Classified  US Citizenship Restrictions  DD254 Required

Security Clearance: [ ]  
Other Clearance: [ ]

**NAICS Code**

NAICS(primary)	339920	Sporting and Athletic Goods	[ ]
NAICS(supporting)	811310	Commercial and Industrial Ma	01/01/2022

**Subcontractor Plan**

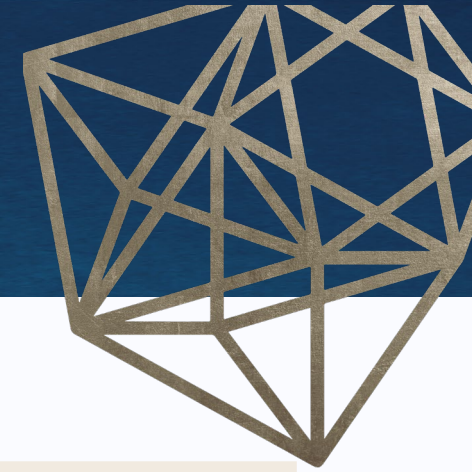
Subcontractor Plan\*: Not Applicable  
Date Submitted: [ ]  
 General Small Business  
Required\*: 0.00% Allocation Total: 0.00%

**Procurement Regulations - Check all that apply**

<input checked="" type="checkbox"/> FAR	<input type="checkbox"/> Treasury	<input type="checkbox"/> HSAR	<input type="checkbox"/> DOE	<input type="checkbox"/> AIDAR
<input checked="" type="checkbox"/> DFARS	<input type="checkbox"/> GSAR	<input type="checkbox"/> AMS	<input type="checkbox"/> NASA	
<input type="checkbox"/> Other	[ ]			

Statement of Work

# FAR Clause Flow down



1

Create the contract  
in Manage Contracts

2

Add the FAR clauses  
using the subtasks  
on the Contract Info  
Tab

3

Create the  
subcontract in  
Manage  
Subcontracts

4

Load the clauses  
from the Contracts  
using the subtasks  
on the Subcontract  
Info tab

# FAR Clauses Flow Down

1. Box to Copy provisions from another contract
2. Box to load single, all, or range of clauses
3. Button to execute selections

The screenshot displays the 'Manage Contracts' interface. At the top, a breadcrumb trail shows 'CRM & Contracts > Contracts > Manage Contracts'. Below this is a table with columns: Contract ID, Contract Name\*, Costpoint Opportunity, Main Opportunity ID, Main Opportunity Name, Prime Contract No, Prime Contract Name, and Record Status. The selected row shows Contract ID 'CNTR-000000000000007', Contract Name 'Tennis Court Building', Costpoint Opportunity checked, Main Opportunity ID 'OPP-000000000000009', Main Opportunity Name 'Tennis court building', Prime Contract No '14567904515984', and Record Status 'Active'.

Below the table is a navigation bar with links: 'GSA Schedule', 'FAR Clauses/Provisions', 'Supplemental Regulations', 'Import FAR/Supplemental Regulation Files', 'Contract Deliverables', 'Team', 'Customer/Contacts', 'Supplier/Vendor Rating', and 'Assessment'.

The 'FAR Clauses/Provisions' section contains a 'Load Options' form. It includes a 'Copy FAR Clauses/Provisions from' field with a search icon (labeled 1), a 'Contract ID' field, and a 'Load Required Rows Only' checkbox. Below this is an 'Option' dropdown menu (labeled 2) set to 'All', and 'Start' and 'End' fields. An 'Autoload' button (labeled 3) is also present.

The main table, titled 'Manage Contracts > FAR Clauses/Provisions', has columns: Applicable to Contract, FAR Number, Title, Clause/Provision\*, Risk Level, Subcontract Flow-down, Description from Contract, Page No, and Page Reference. A red box highlights the 'Subcontract Flow-down' column, which contains dropdown menus for each row. The values in this column are: Required, Required, Optional, -None-, -None-, Required, and Required.

Applicable to Contract	FAR Number	Title	Clause/Provision*	Risk Level	Subcontract Flow-down	Description from Contract	Page No	Page Reference
<input checked="" type="checkbox"/>	52.203-16	Preventing Personal Conflicts of Interest.	Clause	High	Required			
<input checked="" type="checkbox"/>	52.203-17	Contractor Employee Whistleblower Rights and	Clause	High	Required			
<input checked="" type="checkbox"/>	52.208-4	Vehicle Lease Payments.	Clause	-None-	Optional			
<input checked="" type="checkbox"/>	52.208-5	Condition of Leased Vehicles.	Clause	-None-	-None-			
<input checked="" type="checkbox"/>	52.208-6	Marking of Leased Vehicles.	Clause	-None-	-None-			
<input checked="" type="checkbox"/>	52.208-7	Tagging of Leased Vehicles.	Clause	High	Required			
<input checked="" type="checkbox"/>	52.208-8	Required Sources for Helium and Helium Usag	Clause	-None-	Required			



# FAR Clauses Flow Downs - Contract



Subcontract Flow-down option	Flow down FAR clause/provision from contract to subcontract?	Applicable to Subcontract check box default	Can Applicable to Subcontract check box be edited?
None	No		
Optional	Yes	Selected	Yes
Required	Yes	Selected	No
Not Required	Yes	Clear	Yes

CRM & Contracts > Contracts >

**Manage Subcontracts**

Subcontract ID: SUBC-0000000000000003    Subcontract Name: Tennis contract

**FAR Clauses/Provisions**

Copy FAR Clauses/Provisions from: CNTR-0000000000000000

Option: All    Start:    End:    Autoload

**Manage Subcontracts > FAR Clauses/Provisions**

Applicable to Subcontract	Send to PO	FAR Number	Title	Clause/Provision *	Included	Risk Level	Description from Contract	Page No
<input checked="" type="checkbox"/>	<input type="checkbox"/>	52.203-16	Preventing Personal Conflicts of Interest.	Clause	-None-	High		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	52.208-4	Vehicle Lease Payments.	Clause	-None-	-None-		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	52.208-7	Tagging of Leased Vehicles.	Clause	-None-	High		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	52.208-8	Required Sources for Helium and Helium Usag	Clause	-None-	-None-		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	52.208-9	Contractor Use of Mandatory Sources of Suppl	Clause	-None-	-None-		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	52.203-17	Contractor Employee Whistleblower Rights and	Clause	-None-	High		

Close

# FAR Clauses Flow Downs - Subcontracts

**IMPORTANT:** Click  
“Send to PO” checkbox  
for it to appear on the  
purchase order.

CRM & Contracts > Contracts > Manage Subcontracts

**Manage Subcontracts**

Subcontract ID	Subcontract Name *	Agreement Type	Status	Subcontract Start Date	Subcontract End Date	Record Status *	Subcontractor/Vendor ID *
SUBC-0000000000000001	Deltek Inc.					Active	10DELT1
SUBC-0000000000000002	Trophy Making support	Purchase Order	Verbal			Active	10CENT1
SUBC-0000000000000003	NTA on Tennis contract	Subcontractor Agreement	Awarded	01/01/2025	12/31/2025	Active	10NTA

FAR Clauses/Provisions Supplemental Regulations Import FAR/Supplemental Regulation Files Supplier/Vendor Rating Modifications

**FAR Clauses/Provisions**

Load Options

Copy FAR Clauses/Provisions from Contract ID: CNTR-0000000000000007

Option: All Start: End: Load Required Rows Only:

Autoload

**Manage Subcontracts > FAR Clauses/Provisions**

Applicable to Subcontract	Send to PO	FAR Number	Title	Clause/Provision *	Included	Risk Level	Description from Contract	Page No
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2.203-16	Preventing Personal Conflicts of Interest.	Clause	-None-	High		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2.208-4	Vehicle Lease Payments.	Clause	-None-	-None-		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2.208-7	Tagging of Leased Vehicles.	Clause	-None-	High		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2.208-8	Required Sources for Helium and Helium Usag	Clause	-None-	-None-		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2.208-9	Contractor Use of Mandatory Sources of Suppl	Clause	-None-	-None-		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2.203-17	Contractor Employee Whistleblower Rights anc	Clause	-None-	High		

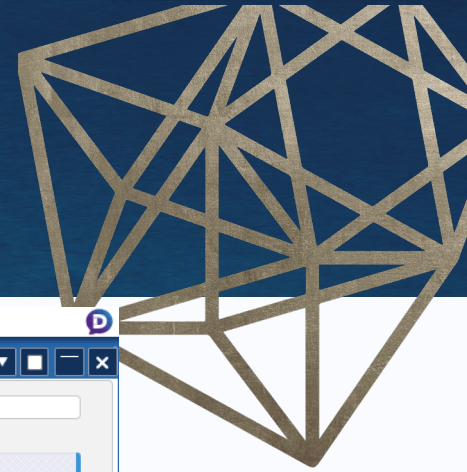
Close

# Contract Brief

- BI < CRM & Contract < Contract Brief
- May Need to Add Additional FAR Clauses

	A	B	C	D	E	F	G	H	I	
1	<b>Contract Brief</b>									
2										
5	Contract Name:			Tennis Court Building			Contract ID:		CNTR-0000000000000007	
6	Organization ID:			10.10.0500			Organization Name:		CO 10 Direct	
7	Prime Contract #:			14567904515984			Date of Award:		Aug 15, 2024	
8	Task Order #:						Contract Status:		Verbal	
16	Estimated Actual Costs (Total Value)		\$400,000		Estimated Fee (Total Value Fee)		\$0		Total Price (Total Value) \$400,000	
17	Estimated Actual Costs (Total Funded)		\$400,000		Estimated Fee (Total Funded Fee)		\$3,600,004		Total Price (Total Funded) \$4,000,004	
18	Period of Performance From:			Jan 1, 2025			Period of Performance To:		Dec 31, 2025	
19	<b>Prime Contractor Info</b>									
20	Name:			Department of Defense						
21	Prime Contract #:			14567904515984			Primary Contract Type:		Time & Materials	
22	<b>Contract Description</b>	<b>Customer Name</b>	<b>Address Code</b>	<b>Point of Contact</b>	<b>Phone Number</b>	<b>Email Address</b>	<b>Active (Y/N)</b>	<b>Primary (Y/N)</b>		
23	Acquisition Customer	Northrup Grumman	BILL	Serena Williams			N	N		
24	Primary Customer	Northrup Grumman	BILL	Serena Williams			N	N		
25										
26	<b>Cognizant DCAA Office:</b>									
27	<b>Brief Statement of Scope of Work</b>									
28										
29	There is no Statement of Work for this contract.									
30	<b>Procurement Regulations - Check All that Apply</b>									
31	FAR		Y		AMS		N			
32	DFARS		Y		DOE		N			
33	Treasury		N		NASA		N			
34	GSAR		N		AIDAR		N			
35	HSAR		N		Other (Specify)					
36	<b>Contract Clauses and Special Provisions</b>									
37	Is this a T&M or FP Contract?						T			
38	Does contract contain an LOE clause?						N			
39	Any GFE?						Y			
40	Does contract contain ceilings on the indirect rates?						N			
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Ready Sheet 4 of 4</span> <span>CNTR-0000000000000003 CNTR-0000000000000005 CNTR-0000000000000006 <b>CNTR-00000000</b> ...</span> <span>Display Settings 100%</span> </div>										

# Contract Close Outs



CRM & Contracts > Contracts > Manage Contracts

**Manage Contracts** [New] [Copy] [Delete] [7 of 8 Existing] [Table] [Find] [Query]

Contract ID: CNTR-000000000000007 Name: Tennis Court Building

Costpoint Opportunity

Main Opportunity ID: OPP-000000000000009 Name: Tennis court building

Prime Contract No: 14567904515984 Name:

Record Status: Active Average Rating: 0%  Exclude from Reports  Use Planning **Smart Summary**

**Contract Close Out**

**CheckList**

Completed	Date Completed	Completed By	
<input type="text" value="Yes"/> Project Complete	<input type="text" value="08/15/2024"/>	<input type="text" value="100010"/>	Laver, Rod
<input type="text" value="-None-"/> Customer Requested Closeout	<input type="text"/>	<input type="text"/>	
<input type="text" value="-None-"/> All Mods Executed	<input type="text"/>	<input type="text"/>	
<input type="text" value="-None-"/> All Subcontracts Closed	<input type="text"/>	<input type="text"/>	
<input type="text" value="-None-"/> Financial Reconciliation Complete	<input type="text"/>	<input type="text"/>	
<input type="text" value="-None-"/> Incurred Cost Submission	<input type="text"/>	<input type="text"/>	
<input type="text" value="-None-"/> Rate Audit Completed	<input type="text"/>	<input type="text"/>	
<input type="text" value="-None-"/> Final Invoice Submitted	<input type="text"/>	<input type="text"/>	
<input type="text" value="-None-"/> Final Invoice Paid	<input type="text"/>	<input type="text"/>	
<input type="text" value="-None-"/> Closeout Package Sent	<input type="text"/>	<input type="text"/>	

**Disposition Summary**

Classified Materials:  Government Property:

Inventions or Patents:  Other Issues:

**Final Acceptance**

To the best of my knowledge, all tasks under this contract have been completed and accepted by the Customer

Employee Signoff:  Kee, Shannon Signoff Date:

# AGENDA

## 1) Costpoint Hot Topics



## 2) Costpoint System Innovations



# SYSTEM INNOVATIONS

New Functions Available in  
CP8.2

New System Update Process  
– Opt-In Options

Current Opt-In Options

# New Functions Available in Current 8.2

- **Holding Transactions in Open Billing Detail Quickly and Efficiently**
- **Split Labor and Non-labor Fee Added to Billing**
- **Use Budgets Created from Planning on Project Status Reports**

# Open Billing Detail

- New “HOLD” button

- New release date field

Projects > Billing > Standard Bill Adjustments > Manage Open Billing Detail

Open Billing Detail

Recalculate Hold

Project *	Project Name	Release Date	Fiscal Year *	Peri	Transaction Amount	Amount on Hold	Journal	Source
700000.3.0.0005.0005AA.AA	Non-Labor ACRN BY	08/01/2024	2023	1	5,000.00	5,000.00	APV	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2023	1	384.62	384.62	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2023	1	822.12	822.12	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2023	1	822.12	822.12	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2023	1	384.62	384.62	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2023	1	822.12	822.12	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2023	1	384.62	384.62	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2023	1	822.12	822.12	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2023	1	384.62	384.62	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2024	3	1,200.00	0.00	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2024	3	1,200.00	0.00	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2024	3	1,200.00	0.00	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2024	3	1,200.00	0.00	LD	SYSTEM
800000.01.LF	OY1 Labor/Fee		2023	1	336.54	0.00	LD	SYSTEM
800000.01.LF	OY1 Labor/Fee		2023	1	822.12	0.00	LD	SYSTEM
800000.01.LF	OY1 Labor/Fee		2023	1	822.12	0.00	LD	SYSTEM
800000.01.LF	OY1 Labor/Fee		2023	1	336.54	0.00	LD	SYSTEM
800000.01.LF	OY1 Labor/Fee		2023	1	822.12	0.00	LD	SYSTEM
800000.01.LF	OY1 Labor/Fee		2023	1	336.54	0.00	LD	SYSTEM
800000.01.LF	OY1 Labor/Fee		2023	1	822.12	0.00	LD	SYSTEM
800000.01.LF	OY1 Labor/Fee		2023	1	336.54	0.00	LD	SYSTEM
700000.2.0.0004.0004AA.AA	T&M Labor ACRN BY		2024	3	500.00	0.00	AJE	SYSTEM



# Split Fee on Bills

- New Separate Fields Available
- Now Matches Revenue

Projects > Billing > Billing Master > Manage Project Billing Information

Project 700000 Example A

Proj Bill Info

Setup Information 1443 Info Other Info Global Withholding Billing Currency Contract Values

**Billing Formula**

Cost Plus Fee On Cost

Labor Fee Pct. 6.0000  Final Billing Completed

Non-Labor Fee Pct. 0.0000

Include Labor Multiplier in Billing Rate

**Retainage**

Basis for Calculation -None-

Withhold On -None-

Percentage 0.00%

Functional Currency Billing Currency

Maximum Amount 0.00 0.00

**Format**

Generic Billing Format 70000  Govt 1443 Billing Format  Govt 1035 Billing Format

**Government 1035 Format Information**

Print Cost Plus or Fixed Price Format  Print Using T&M Format

Roll Up Accounts to Level 1 Supporting Schedule Format STND

**Controls**

Allow Transactions to be Partially Billed

Allow User to Edit Bills

Bill Cost Incurred on Cash Basis

Allow User to Adjust Transactions in Open Billing Detail

Customer Terms NET 30

Billing Cycle MONTH

Remittance Address REMIT1

Billing User Group ACTIVE

Income State

Last Bill Number 700000-0003

[Project Sales Tax](#)

[Detail Levels](#) [Cash Basis](#) [Schedule](#) [Customers](#)

# Planning Budgets on PSR

- **Configure Project Settings: Choose “Planning Project Budgets”**
- **Updating report tables – select either Budget or EAC from Planning Module**

Projects > Project Setup > Project Setup Controls > Configure Project Settings

Project Settings

Projects | Project Segment Lengths | Revenue | Pools | Budgeting | Contracts | IWO

Budgeting Method \* Planning Project Budgets

-Select-  
Budgeting and ETC  
Advanced Budgeting  
Planning Project Budgets

Projects > Project Inquiry and Reporting > Report Processing > Update Project Status Report Tables

Update Project Status Report Tables

Parameter ID \* Description \*

Selection Ranges

Option	Fiscal Year *	Start Period *	Subpd *	Ending Date	End
Accounting Period	One				
Projects	All				

Options

Compute Expense Commitments As Of

Current Date  Subperiod End Date

Compute Open Receivable Amounts As Of

Current Date  Subperiod End Date

**Budget Type**

Budget  EAC

Purge PSRs for Later Subperiods and Periods

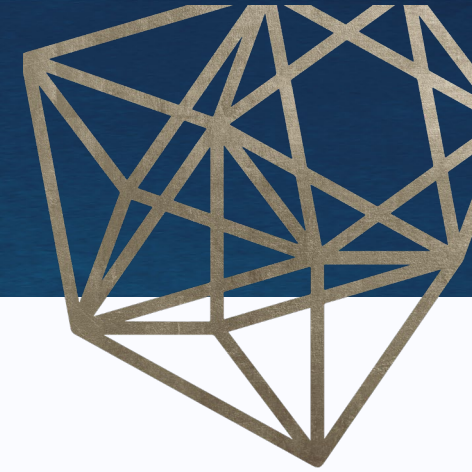
Compute Burden on Commitments

# Opt-In Features

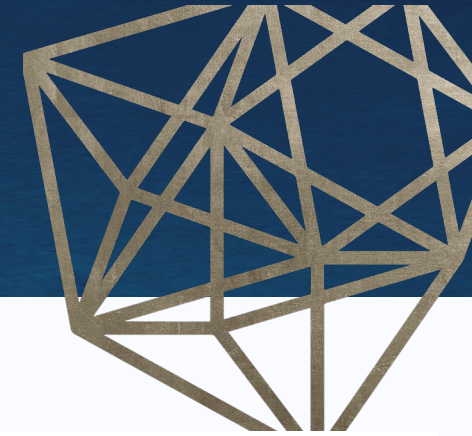
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1. Quarterly new features released
2. Opt-in feature testing period
3. Automatic feature enablement

# Opt-In Features



# Manage Opt-In Features



## Current Opt-In Listing (Summer 2024)

Admin > System Administration > System Administration Utilities > Manage Opt-In Features

Features								Form	Query		
Feature ID	Title	Description	Can Be Disabled	Available On	Enabled	Enable Date	Automatically Enabled on				
2061937	Allowing Prospective Vendors in Subcontract	This feature provides the flexibility to create	<input type="checkbox"/>	07/17/2024 12:00:00 AM	<input type="checkbox"/>		11/19/2024 12:00:00 AM				
2055503	Subcontract and Contract Modification Total:	Add total rows to the modification tab to eas	<input checked="" type="checkbox"/>	07/17/2024 12:00:00 AM	<input type="checkbox"/>		11/19/2024 12:00:00 AM				
2040963	Pass User ID when sending E-mail	The email administration process within Cos	<input checked="" type="checkbox"/>	02/17/2024 12:00:00 PM	<input type="checkbox"/>		10/01/2024 12:00:00 PM				
2038550	Automatic Purchase Order (PO) Reservatio	Adds a Components subtask to purchase re	<input checked="" type="checkbox"/>	07/17/2024 12:00:00 AM	<input type="checkbox"/>		11/19/2024 12:00:00 AM				
1992407	Minor Timesheet Enhancements	The Timesheet includes several minor en	<input checked="" type="checkbox"/>	07/17/2024 12:00:00 AM	<input type="checkbox"/>		11/19/2024 12:00:00 AM				
1973071	Project Workforce Start and End Dates by E	Add Starting and Ending Dates to employee	<input checked="" type="checkbox"/>	07/17/2024 12:00:00 AM	<input type="checkbox"/>		11/19/2024 12:00:00 AM				
1968585	LGBTQ+ Business Classification and Vendo	Add the LGBTQ+ vendor business classifica	<input checked="" type="checkbox"/>	07/17/2024 12:00:00 AM	<input type="checkbox"/>		11/19/2024 12:00:00 AM				
1949936	SUBK Invoices created to track received Inv	Allow User to manually enter the Subcontrac	<input checked="" type="checkbox"/>	07/17/2024 12:00:00 AM	<input type="checkbox"/>		11/19/2024 12:00:00 AM				
1860674	Change Government Furnished Material (GF	GFM verbiage is changed to FM throughout	<input checked="" type="checkbox"/>	07/17/2024 12:00:00 AM	<input type="checkbox"/>		11/19/2024 12:00:00 AM				
1499548	Revaluation Settlement	Select offsetting foreign currency transactor	<input type="checkbox"/>	07/17/2024 12:00:00 AM	<input type="checkbox"/>		11/19/2024 12:00:00 AM				
1480445	Quick Entry Expense Report	Quick Entry Expense Report offers a flexible	<input checked="" type="checkbox"/>	07/17/2024 12:00:00 AM	<input type="checkbox"/>		11/19/2024 12:00:00 AM				
1339609	Supplier Portal Invoice Status and Payment	Add historical invoices to the View Voucher I	<input checked="" type="checkbox"/>	07/17/2024 12:00:00 AM	<input type="checkbox"/>		11/19/2024 12:00:00 AM				

[Applications](#) [Libraries](#) [Patches](#)

# Project Workforce Start and End Dates



- Dates Available for Employees, Vendors, & Vendor Employees
- Validated in People, Time & Expense, Planning, and Accounting domains

Projects > Project Setup > Project Labor > Manage Employee Workforce

Identification: Project 800000.01.LF, OY1 Labor/Fee

Overtime Authorized for Employees

[Assign PLC to Employee Workforce](#)

Employees						Selected Employees					
Employee	Employee Name	Home Organization	PLC	Status		Employee *	Employee Name	PLC	Starting Date	Ending Date	
<input checked="" type="checkbox"/>	1000001	Williams, Serena	10.10.0800	Active	Select	<input checked="" type="checkbox"/>	1000002	Jones, Sandra			
	1000005	Spragins, Mallory	10.10.0500	Active		<input checked="" type="checkbox"/>	1000003	Greer, Pamela		01/01/2024	04/30/2024
	1000006	Stroud, Heather	10.10.0800	Active		<input checked="" type="checkbox"/>	1000004	Kee, Shannon	BUSAN		
	1000012	Lay, Kim	10.10.0800	Active							

# Project Workforce Start and End Dates

- Only on NON-Default Lines
- Cannot be Beyond Dates On Main Screen

Projects > Project Setup > Project Labor > Manage Employee Workforce

Identification: Project 800000.01.LF | OY1 Labor/Fee

Assign PLC to Employee Workforce

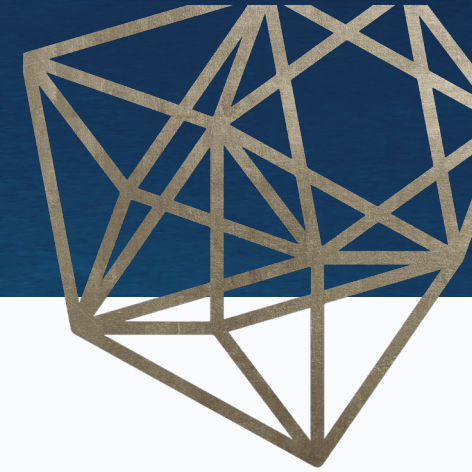
PLCs	Selected Employees																
<table border="1"><thead><tr><th>PLC</th><th>PLC Description</th></tr></thead><tbody><tr><td>AN</td><td>Analyst</td></tr><tr><td>DMRA</td><td>DMR Analyst I</td></tr><tr><td>PM</td><td>Program Manager</td></tr></tbody></table>	PLC	PLC Description	AN	Analyst	DMRA	DMR Analyst I	PM	Program Manager	<table border="1"><thead><tr><th>Employee</th><th>Employee Name</th></tr></thead><tbody><tr><td>1000002</td><td>Jones, Sandra</td></tr><tr><td>1000003</td><td>Greer, Pamela</td></tr><tr><td>1000004</td><td>Kee, Shannon</td></tr></tbody></table>	Employee	Employee Name	1000002	Jones, Sandra	1000003	Greer, Pamela	1000004	Kee, Shannon
PLC	PLC Description																
AN	Analyst																
DMRA	DMR Analyst I																
PM	Program Manager																
Employee	Employee Name																
1000002	Jones, Sandra																
1000003	Greer, Pamela																
1000004	Kee, Shannon																

PLCs Assigned to Employee Workforce

PLC *	PLC Description	Default PLC	Employee *	Employee Name	Starting Date	Ending Date
AN	Analyst	<input checked="" type="checkbox"/>	1000002	Jones, Sandra		
DMRA	DMR Analyst I	<input type="checkbox"/>	1000003	Greer, Pamela	01/01/2024	02/15/2024
PM	Program Manager	<input checked="" type="checkbox"/>	1000003	Greer, Pamela		
AN	Analyst	<input checked="" type="checkbox"/>	1000004	Kee, Shannon		

Close

# Quick Entry Expense Report



**Expense Report**

Submit Save New
◀ ◀ 1 of 3 Existing ↺ ▶ ▶ Table
 Query ▾ □ — ×

Report ID  
ER00000006

Date  
09/05/2024

Description  
use case 1

Status  
Draft

Total to Me  
900.25

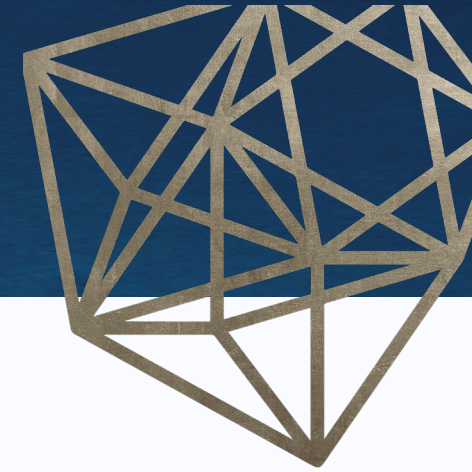
**Expenses**

Unclaimed Expenses Add Delete

✓	Line	Expense Type	Project	Short Description	Attachment	Comments	Expense Date	-	Amount	Total to Me
	1	Lodging/Quick Entry Lodging	<a href="#">GNAD10.GEN</a>	QLODGING/09/05/2024	<a href="#">1 Attached.</a>		09/05/2024		850.00	850.00
	2	Other/Quick Entry Baggage	<a href="#">GNAD10.GEN</a>	QBAGGAGE/09/05/2024	<a href="#">0 Attached, 1 Missing.</a>		09/05/2024		100.00	0.00
	3	Mileage/Quick Entry Mileage	<a href="#">GNAD10.GEN</a>	QMILEAGE/09/05/2024			09/05/2024 <a href="#">Miles 75.00000</a>		50.25	50.25
									Total	900.25



# Quick Entry Expense Report



**Wait for update:**

- **Non-local travel**
- **Business meals**

**Good fit:**

- **Supplies**
- **Subscriptions**
- **Recurring license fees**

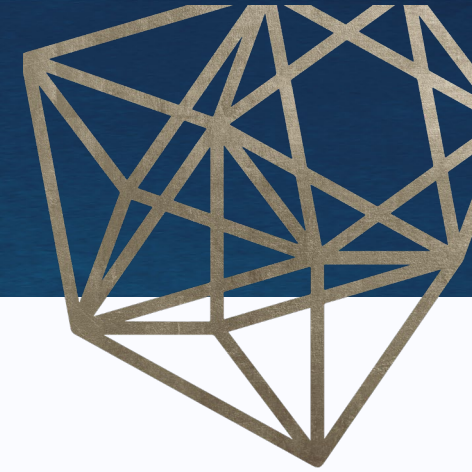


# Opt-In Wrap Up



- **Better Get Ready – This WILL Be the New Normal**
- **Create a Plan For Quarterly Review**
- **Not Implementing is Not An Option – Only Delay and Prepare**

# Wrapping Up



## Hot Topics

- Customized Dashboards – Download Slides
- Reports You Didn't Know You Needed – Investigate Pre-Defined BI Reports
- Annual Rate Adjustment – Must Be Done
- CRM / Contracts Top 5's – Review Usage

## New Innovations

- New Functionality in CP8.2 – Are you Using Them
- New System Opt-In Options – Are you Prepared?

# Costpoint End of Year Preparation Training Series



Get a head start on your year-end preparations!

Whether it's Labor and Leave Training, General Ledger & Projects, or 1099 Processing, you'll earn valuable CPE credits while gaining the insights you need to close out the year successfully.

**2024 End of Year:  
Labor and Leave Training  
Webinar**

November 2024

**2024 End of Year:  
General Ledger & Projects  
Training Webinar**

December 2024

**2024 End of Year:  
1099 Processing**

January 2025



**Sign up now** to be the first to know when our 2024 End of Year webinars open for registration.

# Questions and Discussion





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