

A photograph of several ripe, orange-colored oranges hanging from a tree with green leaves. The image is positioned on the left side of the slide, partially overlapping a diagonal orange background.

# Deltek INSIGHT > 2019

## **CP-35:**

Manage Contracts & Flow-Downs with Costpoint Contract Management

Emily Kourey, Deltek

# Agenda

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- » Overview
- » Manage Contracts Overview
  - » FAR/Suppl Clauses
- » Manage Subcontracts
- » Reporting Options

# Contract Management Overview



# Project vs. Contract

Project	Contract
Financial Details	Non-Financial Details
Financial progress of your projects, including project revenue, expenses, and billings	FAR/Supplemental clauses, provisions, deliverables, business classification, and security requirements

## Two Independent Records

Contract & Project Complement Each Other

## Option: Create Project from Contract

Initialize Project from Contract screen with "Mass Add" set up

## Option: Link Contract to Project

Create records separately and link in Manage Project User Flow

## Bi-Directional Flow of Modifications

Log Mods once in the Contract or Project & updates the other record

## Blended View of Financials & Non-Financials

Gain insight to both key pieces inside of Costpoint

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# Manage Contracts

# Manage Contracts

- » Central Repository for key non-financial contract details
  - » Status
  - » Contract Vehicle
  - » Contact Info
- » Insight into the financial status of the Contract
  - » Contract/Funding Values
  - » ITD Costs and Revenue
  - » ITD Billed
  - » Open Receivables

**Identification**

Contract ID: CNTR-000000000000004    Name: SE2020 SIR2 FO - TO1    Costpoint Opportunity:     Exclude from Reports:

Main Opportunity ID: OPP-008    Name: SE2020 SIR2 FO - DOT DO WJHTC Infrastructure Expansion - TO1

Prime Contract No: DTFAWAI0D00030    Record Status: Active

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

**Basic Info**

Prime Contractor: [ ]    Contract Status: AWARDED    Awarded

Master Contract No: DTFAWAI0D00030    Contract Type: TM    Time & Materials

Subcontract    Project Type: SERVICES    Date Last Modified: 09/16/2019

Subcontract No: [ ]

Purchase Order No: DTFAWAI0D00030-0080

Contract Vehicle: SE2020

Task Order No: 0080

Primary Work Location: FAA WILLIAM J HUGHES TECH CENTER, ATLANTIC CITY NJ

**Secondary Project Types**

BPA     CPFF     FFP     IDIQ

CPAF     CR     FFI     TM

CPIF     CS     FPLOE

Other

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**Contact Info**

Project Manager: 1019    Sexton, Tina    Subcontract Administrator: 1015    Long, William

Billing Analyst: 1010    Williams, Ted    Contract Administrator: 1015    Long, William

Primary Agency: DOT    Department of Transportation    Acquisition Agency: [ ]

Cognizant DCAA Office: [ ]

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Anticipated Contract Value: 2,000,000.00     Contract is at Risk     Alert Sent

View Financial Information: [CNTR-000000000000004](#)

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**Purpose of Contract**

The William J Hughes technical center (WJHTC) has an operational requirement to expand their current infrastructure in laboratory and operational space in order to meet the future demands of technical research requirements. This purchase is to utilize a vendor to perform an investment planning and analysis and provide a business case for expansion.

**Contract Financial Information**

Contract ID: CNTR-000000000000004    SE2020 SIR2 FO - TO1    Record Status: Active

Prime Contract No: DTFAWAI0D00030    Costpoint Opportunity:

Opportunity ID: OPP-008    SE2020 SIR2 FO - DOT DO WJHTC Infrastructure Expansion - TO1

Contract Status: AWARDED

Contract Type: TM

Contract Vehicle: SE2020

Task Order No: 0080

Anticipated Contract Value: 2,000,000.00

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**Contract Info**

Cost	2,006,000.00	Fee	0.00	Fee %	0.00%
Fee					
Total	2,006,000.00				

**Funding Info**

Cost	756,000.00	Fee	0.00	Fee %	0.00%
Fee					
Total	756,000.00				

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**ITD Amounts**

	Actual Rates	Target Rates	Values As Of Date
Cost	636,719.66	636,719.66	08/31/2019
Fee	77,557.74	77,557.74	
Revenue	714,277.40	714,277.40	
Percent Complete Funding	94.48%	94.48%	

ITD Billed Amount: 714,277.40

Open Receivable Amt: 0.00

# Manage Contracts – Saved Queries

- » Saved Queries to quickly display a group of data:
  - » Contract Vehicle
  - » Prime Contract No
  - » Contract Status
  - » Contract Admin

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

New Copy Delete Attach Approval Form Query

Contract Name *	Contract is at Risk	Contract ID	Prime Contract No	Prime Contract Name	Master Contract No	Task Order No	Contract Status *	Contract Type *	Costpoint Opportunity	Main Opportunity ID	Main Opportunity Name	Sub	Contract No	Purcha
1 IDIQ-0001	<input type="checkbox"/>	TEST KH	GS-1234	NITAAC CIO-SP3			AWARDED	FFP	<input checked="" type="checkbox"/>	OPP-000000000000002	<a href="#">VA GI PACS</a>			
2 BPA-0001	<input type="checkbox"/>	TEST KH2	GS-1234	NITAAC CIO-SP3	BPA01		SWO	FFP	<input type="checkbox"/>					
3 ORD-0001	<input type="checkbox"/>	TJEN22	GS-1234	NITAAC CIO-SP3	BPA01	TO1	ACO	COST	<input type="checkbox"/>					
4 ORD-0002	<input type="checkbox"/>	Y	GS-1234	NITAAC CIO-SP3	BPA01	TO2	AWARDED	CPFC	<input type="checkbox"/>					
5 BPA-0002	<input type="checkbox"/>	CNTR-0000000000000015	GS-1234	NITAAC CIO-SP3	BPA02		AWARDED	CPFC	<input type="checkbox"/>					
6 ORD-0003	<input type="checkbox"/>	CNTR-0000000000000016	GS-1234	NITAAC CIO-SP3	BPA02	TO3	AWARDED	CPFC	<input type="checkbox"/>					

Awarded (AWARDED)  
GS-1234 Contracts (GS-1234)  
Admin 1015 (ADMIN 1015)

# Classification

- » SBU/Industry
- » NAICS Code
- » NDA
- » Security
- » Procurement Regulations
- » Statement of Work
- » Subcontractor Plan
  - » Plan Status
  - » Submitted Date
  - » Required Percentage
  - » Allocation Percentage
  - » Track Percentage by Socioeconomic Status

The screenshot displays the 'Manage Contracts' interface. The 'Identification' tab is active, showing contract details for 'SE2020 SIR2 FO - TO1'. The 'Classification' sub-tab is selected, revealing various categories with checkboxes:

- SBUIIndustry - Check all that apply:**
  - Audit
  - Energy
  - Environmental & Transportation
  - Defense & Intelligence
  - Financial Services
  - Other: Aviation & Transportation
  - Global Security & Justice
  - Healthcare
  - International
  - State & Local GPS
  - State & Local Non-GPS
- NAICS Code:**
  - NAICS(primary): 541330 (Engineering Services)
  - NAICS(supporting): [Empty]
- Subcontractor Plan:**
  - Subcontractor Plan: Submitted
  - Date Submitted: 04/05/2017
  - General Small Business Required: 49%
  - Allocation Total: 45%
- Non-Disclosure Agreement (NDA):**
  - NDA Required
  - NDA Signed: 04/01/2017
- Security:**
  - Classified
  - US Citizenship Restrictions
  - DD254 Required
  - Security Clearance: [Empty]
  - Other Clearance: [Empty]
- Procurement Regulations - Check all that apply:**
  - FAR
  - DFARS
  - Treasury
  - GSAR
  - HSAR
  - AMS
  - DOE
  - AIDAR
  - Other: FAA AMS (Acquisition Management System)

Identification > Subcontractor Plan

Load All Socioeconomic Status

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Socioeconomic Status *	Percentage	NAICS
<input type="checkbox"/>	<input type="checkbox"/>	General Small Business	0%	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Woman-Owned	25%	541330
<input type="checkbox"/>	<input type="checkbox"/>	Disadvantaged (Include Minority-Owned)	0%	
<input type="checkbox"/>	<input type="checkbox"/>	Veteran-Owned	0%	
<input type="checkbox"/>	<input type="checkbox"/>	Service-Disabled Veteran-Owned	0%	
<input type="checkbox"/>	<input type="checkbox"/>	Alaskan Native Corporations (ANC) and Indian Tribes	0%	
<input type="checkbox"/>	<input type="checkbox"/>	HUBZone	0%	
<input type="checkbox"/>	<input type="checkbox"/>	Historical Black Colleges & Universities / Minority Institutions	0%	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	8(a) Certified	20%	541330
<input type="checkbox"/>	<input type="checkbox"/>	AbilityOne Non-Profit Agency	0%	



# Contract Info

- » Capture and manage key contract details and provisions
  - » CAS Covered
  - » DPAS Rating
  - » Service Contract Act, etc
- » Contracts & Accounting can collaborate
- » Searchable & Reportable

The screenshot displays a web-based contract management application. The top navigation bar includes 'Browse Applications > Contracts > Contracts > Manage Contracts'. The main content area is titled 'Identification' and contains several input fields for contract details:

- Contract ID: CNTR-000000000000004
- Main Opportunity ID: OPP-008
- Prime Contract No: DTFAWAIDD00030
- Name: SE2020 SIR2 FO - TO1
- Name: SE2020 SIR2 FO - DOT DO WJHTC Infrastructure Expansion - TO1
- Record Status: Active

Below these fields is a tabbed interface with the following tabs: General, Classification, Contract Info, Team, Customers/Contacts, Dates, Modifications, Supplier/Vendor Rating, and Contract Close Out. The 'Contract Info' tab is currently selected and contains the following fields:

- Has copy of proposal been received? \* (Yes/No dropdown)
- Has executed copy of contract been received? \* (Yes/No dropdown)
- Is this a GSA Order? \* (No dropdown)
- Is this a Time & Materials or Fixed Price Contract? \* (T&M dropdown)
- DPAS Purchasing Rating (text input)
- Does contract contain a level of effort clause? \* (No dropdown)
- Any Government Furnished Equipment (GFE)? \* (No dropdown)
- Does contract contain ceilings on the indirect rates? \* (No dropdown)
- Identify any restrictions on allowable costs (text input)
- Identify any cost sharing arrangements within contract (text input)
- Is this a Commercial Contract? \* (No dropdown)
- Is this an 8A Contract? \* (No dropdown)
- CAS Covered? \* (No dropdown)
- Is the Service Contract Act Required? \* (No dropdown)
- Is the Davis Bacon Act Required? \* (No dropdown)
- Any special facility requirements (e.g. SCIF)? \* (No dropdown)
- Does contract have restrictive/special requirements for subcontractors? \* (No dropdown)
- Is Facilities Capital Cost of Money allowable on contract? \* (No dropdown)
- Identify any profit and fee provisions in contract (text input)
- Identify any unallowable costs by terms of contract (text input)
- Identify any other special provisions/limitations specified in contract (text input)

# FAR/Suppl Libraries

- » Two Libraries – FAR and Supplemental Regulations
- » Track specific clauses and details about each clause
  - » Agency (in Suppl library)
  - » Risk Level
  - » Effective Date
  - » Subcontract Flow-Down requirement
- » Admins can add/update clauses to libraries via Excel spreadsheet

Browse Applications > Contracts > Contract Management Controls > Contracts/Subcontracts Controls > Manage FAR Library

Manage FAR Library										
<input checked="" type="checkbox"/>	Required	Included	Risk Level	FAR Clause or Provision Number *	Title *	Description	Clause or Provision *	Editable	Effective Date	Subcontract Flow-down
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	High	52.202-1	Definitions.		Clause	<input type="checkbox"/>		Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	High	52.203-10	Price or Fee Adjustment for Illegal or Imprc		Clause	<input type="checkbox"/>		Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Low	52.203-11	Certification and Disclosure Regarding Pay		Provision	<input type="checkbox"/>		Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Medium	52.203-12	Limitation on Payments to Influence Certai		Clause	<input type="checkbox"/>		Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Medium	52.203-13	Contractor Code of Business Ethics and C		Clause	<input type="checkbox"/>		Optional
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	High	52.203-14	Display of Hotline Poster(s).		Clause	<input type="checkbox"/>		Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	High	52.203-15	Whistleblower Protections Under the Amer		Clause	<input type="checkbox"/>		Optional
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Medium	52.203-16	Preventing Personal Conflicts of Interest.		Clause	<input type="checkbox"/>		Optional
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Low	52.203-17	Contractor Employee Whistleblower Rights		Clause	<input type="checkbox"/>		Optional
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Low	52.203-18	Prohibition on Contracting with Entities tha		Provision	<input type="checkbox"/>		Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Medium	52.203-19	Prohibition on Requiring Certain Internal C		Clause	<input type="checkbox"/>		Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Low	52.203-2	Certificate of Independent Price Determina		Provision	<input type="checkbox"/>		Optional
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Medium	52.203-3	Gratuities.		Clause	<input type="checkbox"/>		Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	High	52.203-5	Covenant Against Contingent Fees.		Clause	<input type="checkbox"/>		Not Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	High	52.203-6	Restrictions on Subcontractor Sales to the		Clause	<input type="checkbox"/>		Not Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Medium	52.203-6 Alternate I	Restrictions on Subcontractor Sales to the		Clause	<input type="checkbox"/>		Optional
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Medium	52.203-7	Anti-Kickback Procedures.		Clause	<input type="checkbox"/>		Not Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	High	52.203-8	Cancellation, Recession, and Recovery of		Clause	<input type="checkbox"/>		Not Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Low	52.204-1	Approval of Contract.		Clause	<input type="checkbox"/>		Optional
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	Medium	52.204-10	Reporting Executive Compensation and Fi		Clause	<input type="checkbox"/>		Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	High	52.204-12	Unique Entity Identifier Maintenance.		Clause	<input type="checkbox"/>		Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	High	52.204-13	System for Award Management Maintenanc		Clause	<input type="checkbox"/>		Required
<input checked="" type="checkbox"/>	<input type="checkbox"/>	-None-	-None-	52.204-14	Service Contract Reporting Requirements.		Clause	<input type="checkbox"/>		Required

# FAR/Supplemental Clauses

- » FAR & Supplemental Libraries accessible within a Contract
  - » Track specific clauses and provisions to a contract
  - » Copy from IDIQ or other Contract record/template
- » Flows down to Subcontract

✓ FAR Clauses/Provisions

- Load Options -

Copy FAR Clauses/Provisions from  Contract ID

FAR Clauses/Provisions  Option

✓	Applicable to Contract	FAR Number	Title	Clause/Provision *	Comments
	<input checked="" type="checkbox"/>	52.202-1	Definitions.	Clause	
	<input checked="" type="checkbox"/>	52.203-10	Price or Fee Adjustment for Illegal or Improper Activity.	Clause	
	<input checked="" type="checkbox"/>	52.203-11	Certification and Disclosure Regarding Payments to Infl	Provision	
	<input checked="" type="checkbox"/>	52.203-12	Limitation on Payments to Influence Certain Federal Tr	Clause	
	<input checked="" type="checkbox"/>	52.203-13	Contractor Code of Business Ethics and Conduct.	Clause	
	<input checked="" type="checkbox"/>	52.203-14	Display of Hotline Poster(s).	Clause	
	<input checked="" type="checkbox"/>	52.203-15	Whistleblower Protections Under the American Recove	Clause	
	<input checked="" type="checkbox"/>	52.203-16	Preventing Personal Conflicts of Interest.	Clause	
	<input checked="" type="checkbox"/>	52.203-17	Contractor Employee Whistleblower Rights and Require	Clause	
	<input checked="" type="checkbox"/>	52.203-18	Prohibition on Contracting with Entities that Require Ce	Provision	

# Contract Team

- » Identify resource relationships to the contract
  - » Labor Rates
  - » Contract Employee Team
  - » Potential Work Force
    - » Employees
    - » Subcontractors
- » Initiate Work Force

Team > Contract Employee Team

Load Opp Employees

<input checked="" type="checkbox"/>	Employee *	Name	Title	Role Description
<input checked="" type="checkbox"/>	1010	Williams, Ted	Relief Worker	Billing Lead
<input checked="" type="checkbox"/>	1015	Long, William	Purchasing Assistant	Contracts Admin
<input checked="" type="checkbox"/>	1111	Murphy, Susanna	Dispatcher	BD Manager
<input checked="" type="checkbox"/>	1136	Doyle, Peter	Sr Director Business Planning	Capture Manager

Team > Potential Work Force Employees

Load Opp Work Force Employees

<input checked="" type="checkbox"/>	Employee *	Name	Title	Role Description	Include in Work Force	ITAR	U.S. Citizen	GLC	PLC	Default PLC
<input checked="" type="checkbox"/>	1093	Adkins, Steve	Shop Resource	BD Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AT	NETDEV	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1104	Barnes, Robert	IT Manager		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	38472	CPM	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1104	Barnes, Robert	IT Manager		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	38472	NETDEV	<input checked="" type="checkbox"/>

Team > Contract Teammates

Load Opp Teamates

<input checked="" type="checkbox"/>	Prime/Subcontractor *	ID *	Name	Role Description	Include in Work Force	PLC	Default PLC
<input checked="" type="checkbox"/>	Prime	100007	Army Space Battlelab		<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Subcontractor	A100004	Rockwell Collins Avionics		<input checked="" type="checkbox"/>	PROJ	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Subcontractor	V100102	The Telephone Company		<input type="checkbox"/>		<input type="checkbox"/>

# Project Initialization

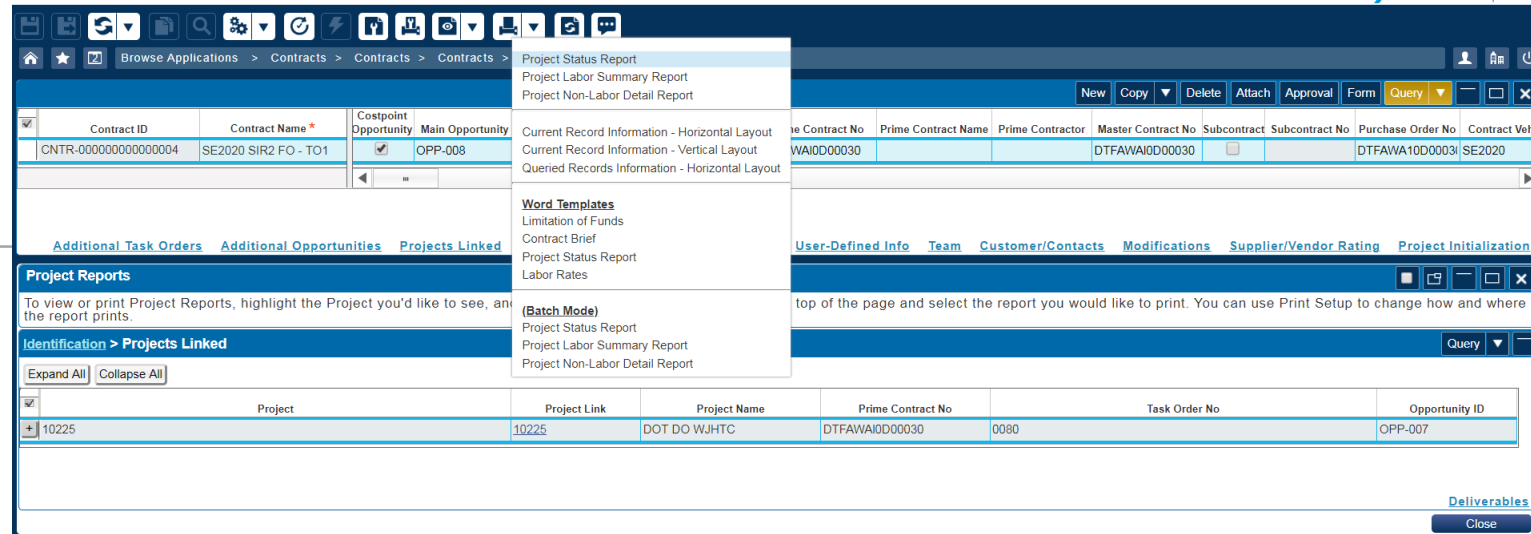
- » Quickly create the project from the contract record.
  - Utilize Mass Add Template Project format
  - Set up Templates for each contract type

The screenshot displays two windows from the Deltek software. The top window is titled "Identification > Project Initialization" and shows configuration for a "Project Template T&M". It includes fields for "Parameter ID" (PROJTM) and "Description" (Project Template T&M). Under "Selection Ranges", there are sections for "Template Project" (Option: One, Start: 10100, End: Training Center) and "Destination Project" (Range: ZHIS3, Start: ZHIS3, End: ZHIS3, Number of Projects: 1). The "Options" section has checkboxes for "Include Basic Info" (checked) and "Include Lower Levels" (unchecked), along with an "Autoload" button. An "Include" list contains: Project Org Account, Project Revenue Setup, Override Fee on Burden, and Override Fee on Direct. The bottom window is titled "Identification > Project Initialization > Details" and shows a table with the following data:

Template Project	Destination Project *	Destination Project Name *	Destination Project Abbrev	Active	Owning Organization *	Task Order	Work Force	Revenue Level	Revenue Formula	Billing Level	Billing Formula	Direct Cost Ceiling	Burden Ceiling	Hours Ceiling
10100	ZHIS3	Training Center		<input checked="" type="checkbox"/>	10.10.2.1	Task Order No	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# View Project Status Reports (PSR)

- » Project Created and Linked to the Contract
- » View Project Status Reports from the contract record
  - » Project Status Report
  - » Project Labor Summary
  - » Project Non-Labor Detail Summary



Applied Technologies, Inc.						Page 1 of 1	
Project Status Report						10/07/19	
BY Project						09:27 AM	
For Fiscal Year: 2019 Period: 8 Subperiod: 1							
For Subperiod Ending: 08/31/19							
Project:	10215	Status:	Active	Contract Value Fee:	ITD Amounts (w/o Future Mods)	Total Amounts (All Mods)	
Project Name:	Base Rec Center 2020	Project Classif:	DIRECT PROJECT	Contract Value Cost:	\$0.00	\$0.00	
Owning Org:	01.02.01	Project Type:	GOVPRODUCT	Contract Value Total:	\$3,087,900.00	\$3,087,900.00	
Customer:	Department of Army	Period of Perf:	Start: 03/01/18	Funded Value Fee:	\$0.00	\$0.00	
Prime Contract No:		End:	02/29/20	Funded Value Cost:	\$3,030,000.00	\$3,030,000.00	
Subcontract No:		Project Manager:	Sherman, Belle	Funded Value Total:	\$3,030,000.00	\$3,030,000.00	
PO No:		Rate Type:	Target	ITD Billed Amount:		\$1,314,262.00	
Performing Org:		Budget Revision:		Open Receivable Amount:		\$30,130.00	
		Budget Type:	B	ITD Retainage Amount:		\$0.00	
				ITD Net Withholding Amt:		\$0.00	

Account Name	Prior Year Actual	Current Period Actual	Year To Date Actual	Contract To Date Actual	Total PO Commitments		
Revenue	\$1,284,304.97	\$97,636.20	\$357,470.76	\$1,641,775.73	\$0.00		
Direct Labor Client Site	13,079.76	3,354.18	25,300.31	38,380.07	0.00		
Direct Labor Corp Site	502,958.34	5,729.16	50,983.71	553,942.05	0.00		
Subs - Labor T&M	0.00	58,420.00	58,420.00	58,420.00	28,280.12		
NonRe DL Client Reg	0.00	0.00	0.00	0.00	1,199.88		
<b>Total Labor Cost, \$:</b>	<b>516,038.10</b>	<b>67,503.34</b>	<b>134,704.02</b>	<b>650,742.12</b>	<b>29,480.00</b>		
Direct Airfare	375.00	0.00	0.00	375.00	0.00		
Direct Hotel	600.00	0.00	0.00	600.00	0.00		
Direct Meals / Ent	241.50	0.00	0.00	241.50	0.00		
<b>Total Non-Labor Cost, \$:</b>	<b>1,216.50</b>	<b>0.00</b>	<b>0.00</b>	<b>1,216.50</b>	<b>0.00</b>		
Fringe Benefits	35.0000	165,955.27	3,179.17	26,699.41	192,654.68	419.96	
OH Applied Service Client	40.0000	0.00	1,811.26	13,662.17	13,662.17	0.00	
OH Applied Service Corp	65.0000	62,501.47	5,027.34	44,736.21	107,239.68	0.00	
OH Applied Manufacturing	60.0000	349,728.87	0.00	349,728.87	349,728.87	971.90	
GENERAL & ADMINISTRATIVE	12.0000	118,339.66	9,302.54	26,376.46	144,716.12	3,587.99	
<b>Total Indirect Cost, \$:</b>	<b>696,525.27</b>	<b>19,320.31</b>	<b>111,476.25</b>	<b>808,001.52</b>	<b>4,979.85</b>		
<b>Total Expense, \$:</b>	<b>1,213,779.87</b>	<b>86,823.65</b>	<b>246,180.27</b>	<b>1,459,960.14</b>	<b>34,459.85</b>		
<b>Profit, \$:</b>	<b>70,525.10</b>	<b>10,812.55</b>	<b>111,290.49</b>	<b>181,815.59</b>	<b>-34,459.85</b>		
<b>Profit, %:</b>	<b>5.81%</b>	<b>12.45%</b>	<b>45.21%</b>	<b>12.45%</b>	<b>-100.00%</b>		

# Contract Modifications

- » Log Modifications in Project OR Contract
- » Bi-directional flow of data
  - » Security Rights
- » Log Admin Mods in Contract only
- » View at each level of a linked project WBS

<span>General</span> <span>Classification</span> <span>Contract Info</span> <span>Team</span> <span>Customers/Contacts</span> <span>Dates</span> <span style="background-color: #0070C0; color: white;">Modifications</span> <span>Supplier/Vendor Rating</span> <span>Contract Close Out</span> <span style="float: right;">Delete Query</span>																	
<span>Collapse All</span> <span>Expand All</span>																	
	Project	Project Link	Name	Contract Mod ID	Project Mod ID	Modification Description	Effective Date	Start Date	End Date	Contract Value Modifications Amount	Contract Value Modifications Fee %	Contract Value Modifications Current Cost	Contract Value Modifications Current Fee	Funding Modifications Amount	Funding Modifications Fee %	Funding Modifications Current Cost	Funding Modifications Current Fee
-	10225	<a href="#">10225</a>	DOT DO WJHTC							2,006,000.00		2,006,000.00	0.00	756,000.00		756,000.00	0.00
	10225	<a href="#">10225</a>	DOT DO WJHTC	C00000		Contact Change	04/09/2018			0.00	0.00%	0.00	0.00	0.00	0.00%	0.00	0.00
+	10225.01	<a href="#">10225.01</a>	T&M Labor Hours							2,000,000.00	0.00%	2,000,000.00	0.00	750,000.00	0.00%	750,000.00	0.00
-	10225.02	<a href="#">10225.02</a>	Monthly Service Fee							6,000.00	0.00%	6,000.00	0.00	6,000.00	0.00%	6,000.00	0.00
	10225.02	<a href="#">10225.02</a>	Monthly Service Fee		0000	Initial Award	12/01/2017	12/01/2017	11/30/2018	6,000.00	0.00%	6,000.00	0.00	6,000.00	0.00%	6,000.00	0.00

Contract/Project Modifications

# Contract Documents

- » Attach all Contract-related Documents within each record
  - » Documents Subtask – Works with Alternate Folder

Document ID *	Date Received	Document Type	File Location	File Name	Description
DOC-001	06/12/2017	Base Contract and Mods	CNTCMI	Contract Award DTFAWA10D00030-0080.pdf	Contract Award
DOC-002	07/15/2017	Base Contract and Mods	CNTCMI	Modification 0001 DTFAWA10D00030-0080.pdf	Modification 001
DOC-003	08/23/2017	Base Contract and Mods	CNTCMI	Modification 0002 DTFAWA10D00030-0080.pdf	Modification 002
DOC-004	09/05/2017	Base Contract and Mods	CNTCMI	Modification 0003 DTFAWA10D00030-0080.pdf	Modification 003
DOC-005	06/12/2017	Correspondence	CONTRACTMGMT	Client Email.pdf	Email confirming Kickoff meeting with client
DOC-006	04/12/2017	Non-Disclosure Agreement	CONTRACTMGMT	NDA.pdf	NDA with FAA

- » CMI – Works with existing SharePoint or CMIS system

Content Type *	Content File Name *	CMS File Status	Notes	Modified
CNTR_DOCS	Contract Award 1.docx	OK	Contract Award Document	12/06/2018 11:52:12 AM



# Contract Closeout

- » Make sure your Contracts get closed out!
- » Built-in Checklist of Closeout items
- » Identify if it's completed or N/A, when it was completed and who it was completed by
- » Track how Classified Materials, Government Property and Patents are closed out
- » Final Acceptance once the contract is fully closed out

The screenshot displays a software interface for contract closeout. At the top, a navigation bar includes tabs for General, Classification, Contract Info, Team, Customers/Contacts, Dates, Modifications, Supplier/Vendor Rating, and Contract Close Out. The main section is titled 'CheckList' and contains a table with columns for 'Completed', 'Date Completed', and 'Completed By'. Below this is a 'Disposition Summary' section with four text boxes for 'Classified Materials', 'Government Property', 'Inventions or Patents', and 'Other Issues'. At the bottom, a 'Final Acceptance' section includes a checkbox for customer acceptance, an 'Employee Signoff' field with a dropdown menu, and a 'Signoff Date' field.

Completed	Date Completed	Completed By
Yes	06/22/2017	1104 Barnes, Robert
Yes	07/05/2017	1101 Bridges, Stephen
Yes	06/22/2017	1101 Bridges, Stephen
Yes	07/31/2017	1003 Baker, Peggy
Yes	07/31/2017	1104 Barnes, Robert
N/A		
N/A		
Yes	07/03/2017	1104 Barnes, Robert
Yes	07/26/2017	1104 Barnes, Robert
Yes	08/01/2017	1101 Bridges, Stephen

**Disposition Summary**

**Classified Materials**  
N/A

**Government Property**  
All employee issued laptops were returned on the final day of work.

**Inventions or Patents**  
N/A

**Other Issues**  
All badges were returned on the last day of work. Confirmed with PM Patricia Hayes on 062317 that there are no outstanding items with the client. RB.

**Final Acceptance**

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

Employee Signoff: 1101 Bridges, Stephen Signoff Date: 08/07/2017

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# Manage Subcontracts

# Manage Subcontracts

- » Manage non-financial details of Subcontract Agreement with your Vendors
- » Ability to link Opportunities, Contracts and Projects
- » Insight into financial status of Subcontract Project
- » Identify Vendor Employees supporting subcontract
- » Attach NDAs and other agreements; capture expiration dates and ensure they are active

New Copy Del

**Identification**

Subcontract ID: SUBC-000000000000001

Agreement Type: Subcontractor Agreement

Subcontract Start Date: 06/11/2017

Subcontract Name\*: FAA-Balmar-Subc-0001

Status: Awarded

Subcontract End Date: 12/30/2017

Record Status: Record Status

**General** | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes

**- Subcontractor Information -**

Subcontractor/Vendor ID\*: V100013 | Name: Balmar Consulting |  NDA Received

Long Name: Balmar Consulting | CAGE Code: \_\_\_\_\_

Specialty: \_\_\_\_\_ | DUNS Number: \_\_\_\_\_

Subcontractor Administrator: 1016 | Page, Amy

**- Prime Contract Information -**

Contract ID: CNTR-000000000000004 | [SE2020 SIR2 FO - TO1](#) | Contract Type: \_\_\_\_\_

Opportunity ID: OPP-008 | [SE2020 SIR2 FO - DOT DO WJHTC Infrastructure Expansion](#) | Total Contract Value: \_\_\_\_\_

Prime Contract No: DTFAWA10D00030 | SE2020 SIR2 FO - SE2020 | Aggregate Subcontract Value: \_\_\_\_\_

Contract Task Order: DTFAWA10D00030-0080 | Percentage of Total Contract Value: \_\_\_\_\_

Contract Start Date: 06/11/2017 | Contract End Date: 12/30/2017

Subcontract No: FAA-Balmar-Subc-0001

GSA Schedule: \_\_\_\_\_ | SIN Number/Description: \_\_\_\_\_

**- Subcontract Project Data -**

Subcontract Project ID: 10225.01 | T&M Labor Hours: \_\_\_\_\_ | Subcontract Project Type: \_\_\_\_\_

Short Description of Work: Assist with planning and analysis in order to provide a business case for expansion.

Project Manager: 1048 | Chadwick, Bill S

Project Start Date: 12/01/2017 | Project End Date: 11/30/2018

Project Funded Value	750,000.00	Project Contract Value	2,000,000.00
Total Subcontract Funding	75,000.00	Total Subcontract Contract Value	0.00
ITD Subcontractor Expenses	0.00		
Remaining Funded Value	75,000.00		

[Subcontractor Address/Contact Info](#) | [Vendor Employees](#) | [NDA](#) | [Additional Opportunities](#)

# Subcontract Info

- » Manage key subcontract details
- » Security Requirements, ITAR Status, NAICS Codes
- » Business Classification Requirements specific to agreement

**Identification**  
 Subcontract ID: SUBC-000000000000001  
 Agreement Type: Subcontractor Agreement  
 Subcontract Start Date: 06/11/2017  
 Subcontract Name\*: FAA-Balmar-Subc-0001  Exclude from Reports  
 Status: Awarded  
 Subcontract End Date: 12/30/2017  
 Record Status\*: Active

**General** | **Subcontract Info** | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes

Subcontract CAS Required?\*: No  
 Incurred Cost Submission Required?\*: No  
 Incurred Cost Submission Date:   
 Certification of Insurance Expiration Date:      
 DPAS Purchasing Rating:

Subcontract Reporting Required?\*: Yes  
 Subcontract Plan Submitted?\*: Yes  
 Is this an 8A Contract?\*: No  
 Is the Service Contract Act Required?\*: No

Is this a Commercial Contract?\*: No  
 Subcontract Type: Time & Materials  
 OCI Mitigation Plan\*: No  
 Is the Davis Bacon Act Required?\*: No

**Security Requirements**  
 US Citizen

**Business Classification Requirements**  
**Size**  
 Large  Small  Non-Profit  Foreign/Other

Woman-Owned  
 Disadvantaged (Include Minority Owned)  
 Veteran-Owned  
 Service-Disabled Veteran-Owned

Alaskan Native Corporation (ANC) and Indian Tribes  
 HUB Zone  
 Historical Black Colleges and Universities/Minority Institutions  
 Other

**ITAR Status**  
 US Person Authorized for ITAR  
 Foreign Person with U.S. Dept of State Authorization/Special Exemption  
 Not Authorized  
 Not Applicable

**NAICS Codes**  
 NAICS (primary): 541330 Engineering Services  
 NAICS (secondary):

[FAR Clauses/Provisions](#) [DFARS Clauses](#)

# Requisitions & Purchase Orders

- » Link Requisitions and Purchase Orders from Procurement Module to the Subcontract Agreement
- » Full visibility within one repository
  - » Hyperlink to access PRs and Pos
  - » If using Subcontractor Management, see Work Assignments

★ [Home] Browse Applications > Contracts > Contracts > Subcontracts > Manage Subcontracts

**Identification**

Subcontract ID: SUBC-000000000000001  
Agreement Type: Subcontractor Agreement  
Subcontract Start Date: 06/11/2017

General Subcontract Info **Requisitions** Purchase Orders Modifications Scope of Work Supplier/Vendor Rating Notes

Requisition ID *	Revision	Status	Requisition Date	Requisitioner Name	Requisition Total
<a href="#">PR-0000082</a>	0	Approved	12/11/2017	Bridges, Stephen	3,750.00

General Subcontract Info Requisitions **Purchase Orders** Modifications Scope of Work Supplier/Vendor Rating Notes

PO ID *	Release	Change Order No	Order Date	Status	Procurement Type	PO To
<a href="#">PO-0000087</a>	0	0	05/04/2017	Closed	Subcontractor	
<a href="#">PO-0000140</a>	0	1	03/01/2018	Open	Subcontractor	

# Vendor Rating System

- » Evaluate Vendors based on their performance
- » Define objectives for four categories
  - » Responsiveness/Innovation, Customer Service, Financial, Relationship
- » Establish a rating and score
- » Score is calculated and a grade is provided
- » Perform multiple evaluations over the course of a contract

Subcontractor/Vendor ID \* V100013 Balmar Consulting  
Project ID 10225.01 T&M Labor Hours  
Date Reviewed 12/30/2017  
Percent 90% Total Score 95

Rating Code	Rating Code Description	Score
FULL	Fully Meets	7
MOST	MOSTLY Meets	6
SOME	Meets Some	5
BARELY	Barely Meets	4
DNM	Does Not Meet	3

Supplier/Vendor Rating > Supplier/Vendor Rating

**- Responsiveness/Innovation**

	Rating	
Vendor understands and complies with company's requirements	Fully Meets	<input checked="" type="checkbox"/> Responsiveness and Innovation
Vendor contact is knowledgeable on products/services	MOSTLY Meets	<input checked="" type="checkbox"/> Although the vendor has not always known how to do the service, they communicate if there is a question or address questions.
Vendor communicates all relevant information efficiently	Meets Some	<input checked="" type="checkbox"/>
Company can easily find right vendor contract when needed	Barely Meets	<input checked="" type="checkbox"/>
Vendor provides "best in class" practices	Does Not Meet	<input checked="" type="checkbox"/>

**- Customer Service, Quality and Delivery**

Products/Services provided promptly and with proper documentation	Fully Meets	<input checked="" type="checkbox"/> Customer Service, Quality and Delivery
Products/Services are accurate/complete and free of defects	Fully Meets	<input checked="" type="checkbox"/> The team has consistent communication.
Vendor handles concerns/issues appropriately	Fully Meets	<input checked="" type="checkbox"/>
Vendor meets services/support commitments	Fully Meets	<input checked="" type="checkbox"/>

**- Financial**

Value of vendor's products/technologies/services meets expectations	Fully Meets	<input checked="" type="checkbox"/> Financial comments
Proposals/invoices are accurate and timely	Fully Meets	<input checked="" type="checkbox"/> Vendor invoices always have proper backup. If there is a question, the department is very responsive.
Vendor's pricing is competitive	Fully Meets	<input checked="" type="checkbox"/>
Reports are prepared on a monthly/ad-hoc basis	Fully Meets	<input checked="" type="checkbox"/>

**- Relationship**

Overall the relationship with vendor meets expectations	Fully Meets	<input checked="" type="checkbox"/> Relationship comments
Contract negotiations are completed timely and meet expectations	Fully Meets	<input checked="" type="checkbox"/> Overall, great relationship. Issues with the contract were resolved promptly.

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# Reporting

# Word Templates

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- » Word Templates

- » A tool that allows clients to create a form or template style report format in Microsoft Word, add Costpoint data fields, and then run the report out of specific screens in Costpoint. The concept is similar to Mail Merge.
- » This tool is helpful for clients who have simple forms or reports that are screen-specific to quickly run a report.
- » This is not a report writing tool and does not replace the need for Cognos Enterprise Reporting (CER)

- » Requirements

- » Included with Core Costpoint using Microsoft Word 2013 or higher
- » Works with all Costpoint screens

- » Examples



# Word Templates

- » Supplier/Vendor Rating Review
  - » Populates with data from the contract or subcontract record
  - » Display all reviews or a single review

SUBCONTRACTOR: BALMAR CONSULTING (V100013)			
SUBCONTRACT: FAA-BALMAR-SUBC-0001 (SUBC-0000000000000001)			
PROJECT ID: 10225.01 PROJECT NAME: T&M LABOR HOURS			
MAX TOTAL SCORE: 105		PERCENT: 90%	
TOTAL SCORE: 95			
VENDOR SCORE KEY: 3			
DATE REVIEWED: 12/30/2017			
<b>RESPONSIVENESS/INNOVATION</b>			
Vendor understands and complies with company's requirements	Fully Meets	7	Although the vendor has been great about meeting deliverables and knows how to do the services, it is very challenging to get them address questions.
Vendor contact is knowledgeable on products/services	Fully Meets	6	
Vendor communicates all relevant		5	
Vendor provides "best in class" practices		3	
<b>CUSTOMER SERVICE, QUALITY AND DELIVERY</b>			
Products/Services provided promptly and with proper documentation	Fully Meets	7	The team has consistently met all deliverables.
Products/Services are accurate/complete and free of defects	Fully Meets	7	
Vendor handles concerns/issues appropriately	Fully Meets	7	
Vendor meets services/support commitments	Fully Meets	7	
		0	
<b>FINANCIAL</b>			
Value of vendor's products/technologies/services meets expectations	Fully Meets	7	Vendor invoices always received by deadlines, are accurate and contain proper backup. If there are any issues or
Proposals/invoices are accurate and timely	Fully Meets	7	

# Word Templates

- » Subcontract Summary
  - » Populates with data from the subcontract record
  - » Including Modification Information

## SUBCONTRACT SUMMARY

Subcontractor Name: HHS-Balmar-Subc-0001								
Subcontract Name: HHS-Balmar-Subc-0001		Status: AWARDED						
Agreement Type: Subcontractor Agreement		Subcontract Type: Time & Materials						
Project Funded Value	\$2,145,135.06	Project Contract Value	\$2,145,135.06					
Total Subcontract Funding	\$40,000	Total Subcontract Contract Value	\$50,000					
ITD Subcontractor Expenses	\$0	Subcontract Start Date	06/01/2017					
Remaining Funded Value	\$40,000	Subcontract End Date	05/31/2022					
<b>Business Classification Requirements</b>								
Size	SMALL	ANC and Indian Tribes	UNCHECKED					
Woman-Owned	UNCHECKED	HUB Zone	CHECKED					
Veteran-Owned	UNCHECKED	Historical Black Colleges	UNCHECKED					
Disadvantaged (Include Minority Owned)	UNCHECKED	Other						
Service-Disable Veteran-Owned	UNCHECKED							
<b>Brief Statement of Scope of Work</b>								
C.2.5 Task Area 5 – IT Operations and Maintenance								
The objective of this task area is to support the operation and maintenance of IT systems, keeping IT systems viable with supported vendor releases or off-the-shelf applications software upgrades. Operations and maintenance on IT systems shall include all software and hardware associated with mainframes, client/server, web-based applications, and networking.								
<b>Contract Modification Summary</b>								
Proj ID	Support Mod ID	Proj Mod ID	Description	Effective Date	Start Date	End Date	Contract Value	Funded Value
	5000		Contact Change	04/04/2019	04/01/2019	03/31/2020	\$0	\$0
							\$50,000	\$40,000
10115							\$50,000	\$40,000
10115.10							\$50,000	\$40,000
10115.10	5002	0008	POP Change	05/17/2019			\$0	\$0
10115.10	5000	0007	Contact Change	04/04/2019	04/01/2019	03/31/2020	\$0	\$0
10115.10	5000	0006	Contact Change	04/04/2019	04/01/2019	03/31/2020	\$0	\$0
10115.10	5000	0005	Contact Change	04/04/2019	05/01/2019	03/30/2020	\$0	\$0
10115.10	5000	0004	Contact Change	04/04/2019	04/01/2019	03/31/2020	\$0	\$0
10115.10		0003	Incremental Funding	04/01/2019	04/01/2019	03/31/2020	\$10,000	\$10,000
10115.10	5001	0002	Contact Change	04/04/2019	04/01/2019	03/31/2020	\$0	\$0
10115.10	5000	0001	Award	04/02/2019	04/01/2019	03/31/2020	\$40,000	\$30,000
10115.10	5003		POP Change	05/17/2019			\$0	\$0
10115.10	5000		Contact Change	04/04/2019	04/01/2019	03/31/2020	\$0	\$0

# Word Templates

## » Subcontract Agreement

» Populates with data from the subcontract record

» Everything in green is populated from Costpoint; black is template language

### APPLIED TECHNOLOGIES, INC

#### Time and Material Subcontract Agreement

Subcontractor: Balmar Consulting (V100013)	Subcontract No:	
Subcontractor Address:	Prime Contract Name:	CIO-SPE-TO1 HHS IT O&M
2751 Federal Systems Park Drive	Prime Contract No:	HHSN847351200567W
Fairfax, VA 22032	Task Order No:	HHSP233201700137W
Email: MGarrett@balmarcons.com	Applied Technologies Contract No	10115.00.01
Phone: 851-383-3892	DPAS Rating	1
	Applied Technologies Customer	
	Period of Performance	06/01/2017 - 05/31/2022
	Financial Information	
	Funded Value	\$40,000
	Ceiling Value	\$50,000

#### Article 1. Statement of Work:

##### C.2.5 Task Area 5 – IT Operations and Maintenance

The objective of this task area is to support the operation and maintenance of IT systems, keeping IT systems

viable with supported vendor releases or off-the-shelf applications software upgrades. Operations and maintenance on IT systems shall include all software and hardware associated with mainframes, client/server, web-based applications, and networking. A comprehensive, but not limited, sampling of work to

be performed under this task area is shown below:

- a. Operational Support
- b. Software Maintenance and Upgrades
- c. Telecommunications Maintenance (Data, Voice, Images, including Wireless)
- d. Infrastructure Management Services (IMS)
- e. Configuration Management
- f. Network/Hardware Support
- g. Help Desk/IT Support
- h. Resource Management
- i. Backup and Recovery Management
- j. Installation, Configuration, and Tuning
- k. Electronic Software Licensing Services including license: deployment, management, tracking, upgrading, etc.
- l. System Management
- m. IT Training
- n. IT Operation and Maintenance Planning
- o. Data Quality Management
- p. Transformation Services
- q. Continual Service Improvement

- r. Balanced Scorecard for Operations
- s. IT Infrastructure Optimization

#### Article 2. Insurance:

The Subcontractor, at its own expense, shall obtain and maintain in full force and effect, without interruption during the term of the Agreement, the following minimum levels of insurance:

- A. Workers' Compensation insurance covering the legal liability of the Contractor and its Subcontractors under the applicable workers' compensation or occupational disease laws for claims for personal injuries and death resulting there from the Contractor and its Subcontractor's employees. The Subcontractor shall also obtain a minimum of \$500,000 of Employees' Liability Insurance. Certificates of insurance must include a waiver of subrogation in favor of the Contractor.
- B. Commercial General Liability insurance covering the legal liability (including liability assumed contractually, whether incidental or not) of the Subcontractor who may be engaged in the services, for claims for personal injuries (including death) and property damage resulting there from arising out of the services to be performed by the Subcontractor, in an amount not less than \$500,000 for any one occurrence, \$1,000,000 general aggregate (subject to a per project general aggregate provision), \$1,000,000 Products/Completed Operations aggregate limit. Commercial coverage, products/completed operations, cross liability, severability of interest and broad form property damage (if required), and Contractor as well as its directors, officers and employees shall be named as an additional insured on such Commercial General Liability policy regarding liability arising out of operations performed under this Agreement. Form CG 20 10 07 04 and CG 20 37 07 04 must be shown on the certificate of insurance or its equivalent.
- C. Automobile Liability insurance is not applicable

The Subcontractor's insurance coverage shall be primary insurance as respects work on this project for Contractor, its directors, officers, and employees. Any insurance or self-insurance maintained by Contractor shall be excess of the Subcontractor's insurance. The Subcontractor, in its agreement with subcontractors, shall require subcontractors to obtain insurance meeting the minimum limits and incorporating the contractual requirements that are prescribed by this Section. The Subcontractor hereby waives and relinquishes any right of subrogation against Contractor and its agents, representatives, employees, and affiliates they might possess for any policy of insurance provided under this Section or under any State or Federal Workers' Compensation or Employer's Liability Act. Subcontractor shall require its insurer to notify Contractor thirty (30) days prior to the effective date of any cancellation or material change in any of the required policies. To the extent that the Subcontractor utilized deductibles in conjunction with the insurance required by the Agreement, all deductible expenses will be assumed by the Subcontractor. Insurance shall be placed with the inducers with a Best rating of not less than A-.

#### Article 3. Indemnification and Arbitration:

The work performed by the Subcontractor shall be at the risk of the Subcontractor exclusively. Subcontractor hereby indemnifies and holds Contractor, its parent and affiliates and their respective officers, directors, employees and agents, harmless from and against any and all claims, actions, losses, judgments, or expenses, including reasonable attorney fees, arising from or in any way connected with the work performed, materials furnished, or services provided to Contractor during the term of this Agreement.

SUBCONTRACTOR	CONTRACTOR
Company: Balmar Consulting	Company: Applied Technologies, Inc.
By: _____	By: Page, Amy
Title: _____	Title: Subcontract Administrator
Date: _____	Date: May 18, 2018

# Contract Reports and Inquiries

- » Contract Backlog
- » Contracts by Administrator
- » Contract Vehicle
- » Contract Financial Information



## Applied Technologies, Inc. Contract Backlog Report

Page 1 of 1  
09/17/19  
01:23 PM

Contract ID Contract Name	Prime Contract No	Contract Vehicle	Contract End Date	Contract Type	Funded Value	Total Target Revenue	Remaining Value	Target % Complete Value
CNTR-0000000000000004 SE2020 SIR2 FO - TO1	DTFAWA10D00030	SE2020	12/30/17	TM	756,000.00	714,277.40	41,722.60	94.48%
CNTR-0000000000000005 Base Rec Center 2020			02/15/18	HYBRID	3,030,000.00	1,544,139.53	1,485,860.47	50.96%
CNTR-0000000000000009 Base Operation Support		GSASCH	12/31/19	EAC	2,450,000.00	1,428,664.82	1,021,335.18	58.31%
CNTR-0000000000000012 Enterprise Foundation			12/31/19	FFP	1,700,000.00	1,100,000.00	600,000.00	64.71%
CNTR-0000000000000006 NETCENTS 2 - TO 3	FA877109R0028	NETCENTS	12/31/20	FFP	3,000,000.00	2,867,858.79	132,141.21	95.60%
CNTR-0000000000000008 NETCENTS 2 - TO 6	FA877109R0028	NETCENTS	12/31/20	FFP	2,000,000.00	1,297,082.96	702,917.04	64.85%
CNTR-0000000000000010 Data Acquisition Systems	GS98541RV564	GSASCH	12/31/20	HYBRID	5,600,000.00	1,548,616.50	4,051,383.50	27.65%
CNTR-0000000000000011 Intl Nutrition Advocacy			12/31/20	TM	3,100,000.00	1,752,821.00	1,347,179.00	56.54%
CNTR-0000000000000013 EDUCATION TRAINING			12/31/20	GCOST	1,000,000.00	572,377.83	427,622.17	57.24%
CNTR-0000000000000014 Intl Nutrition Advocacy I			12/31/20	TM	500,000.00	237,748.80	262,251.20	47.55%
CNTR-0000000000000015 NETCENTS 2 - TO 4	FA877109R0028-4	NETCENTS	12/31/24	FFP	400,000.00	279,074.36	120,925.64	69.77%
<b>Total:</b>					<b>23,536,000.00</b>	<b>13,342,661.99</b>	<b>10,193,338.01</b>	<b>56.69%</b>

# Costpoint Reports

- » Subcontract Inquiry
  - » Get snapshot of Subcontract Information
  - » Save Parameters to view saved searches

Subcontract Inquiry Details				1 of 7 Existing		Table	
<b>Subcontract Information</b>							
Subcontract ID	SUBC-000000000000001	FAA-Balmar-Subc-0001	Subcontract Start Date	06/11/2017			
Subcontractor/Vendor ID	V100013	Balmar Consulting	Subcontract End Date	12/30/2017			
Total Subcontract Contract Value	0.00		Subcontract Status	Awarded			
Total Subcontract Funding	75,000.00		Subcontractor Administrator	1016			
Subcontract Project ID	10225.01	T&M Labor Hours	Agreement Type	Subcontractor Agreement			
<b>Contract Information</b>							
Contract ID	CNTR-000000000000004	SE2020 SIR2 FO - TO1	Prime Contract No	DTFAWA10D00030			
Task Order No	DTFAWA10D00030-0080		Contract Start Date	06/11/2017			
Opportunity ID	OPP-008	SE2020 SIR2 FO - DOT DO WJHTC Infrastr	Contract End Date	12/30/2017			

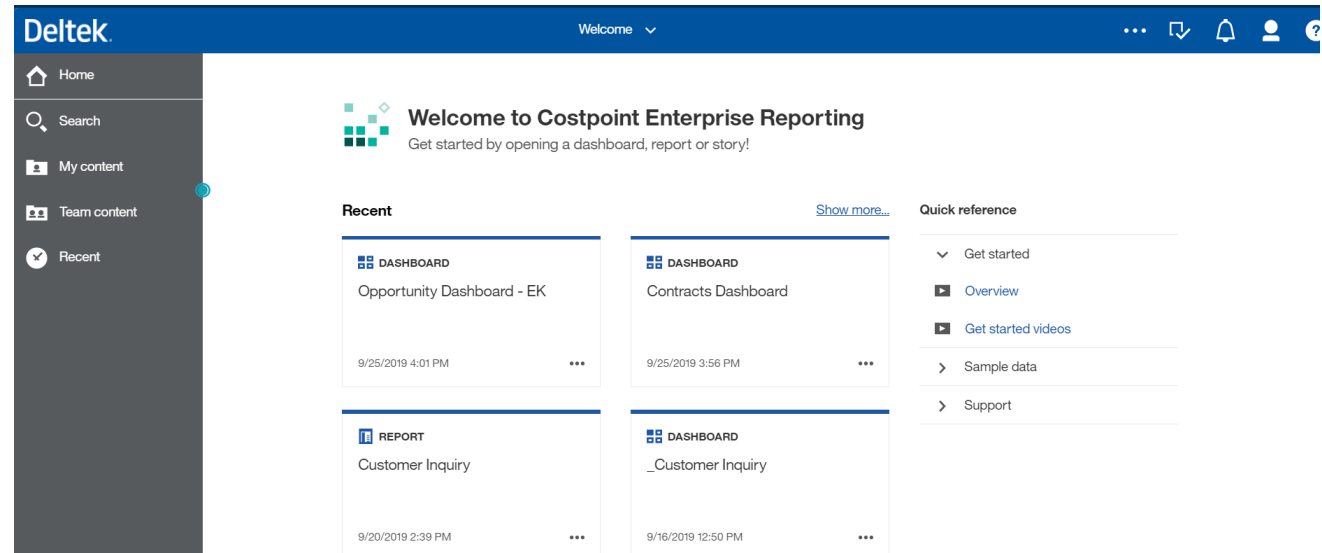
# Costpoint Reports

- » Vendor COI & NDA Expiration Report
  - » Inquiry to see when agreements are set to expire
  - » Schedule report in CER to run based on a set period (ie: 30 days)

Delttek		Applied Technologies, Inc. Vendor COI & NDA Expiration Report					
Subcontract ID	Subcontract Name	Contract ID	Status	Subcontract Start Date	Subcontract End Date	NDA Exp Date	COI Exp Date
<b>Vendor: Balmar Consulting (V100013)</b>							
SUBC-0000000000000001	FAA-Balmar-Subc-0001	CNTR-0000000000000004	Awarded	06/11/2017	12/30/2017	12/31/2020	
SUBC-0000000000000003	Base Subk Agreement	CNTR-0000000000000005	Awarded	03/01/2018	05/31/2018		
SUBC-0000000000000005	NETCENTS-Balmar-Subc-0001	CNTR-0000000000000006	Awarded	01/01/2019	12/30/2019		
<b>Vendor: Network Consultants (V100128)</b>							
SUBC-0000000000000006	Network Consultants	CNTR-0000000000000009	Pre-Award	05/01/2019	12/31/2019		
<b>Vendor: Premiere Solutions (V100089)</b>							
SUBC-0000000000000002	FAA-Premiere-Subc-0002	CNTR-0000000000000004	Awarded	06/01/2017	12/30/2017	12/30/2017	
<b>Vendor: Test Logistics (V100125)</b>							
SUBC-0000000000000007	Test Logistics	CNTR-0000000000000009	Pre-Award	05/01/2019	12/31/2019		

# CER Reports and Dashboards

- » CER version 7.2 using Cognos 11
  - » Embedded in Costpoint
  - » Report on any data in Costpoint
  - » Dashboard functionality is very user friendly
- » Out of the box reports and dashboards for Contract Management data
- » Create specific reports/dashboards for your business
- » Use our reports as a starting point



# Contracts Dashboard

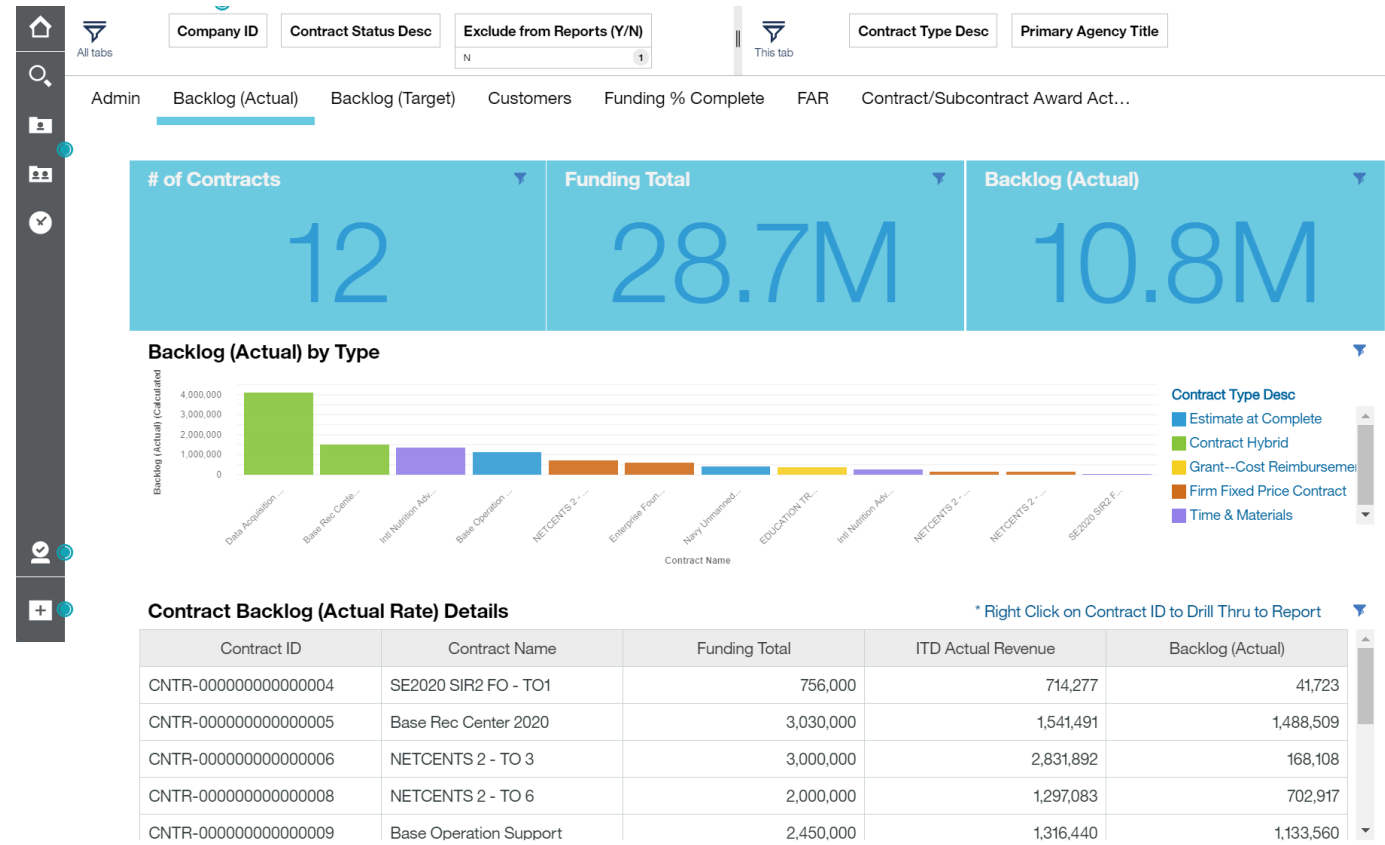
» Look at different snapshots of Contract Data

» Admin

» Backlog

» Customers

» 75% Funding





# Other Sessions

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- » Got Subcontracts - See What Costpoint Can Do for You – CP 32
  - » Wednesday, 11/20/19 **3:20 PM - 4:20 PM** Sarasota 1-2
- » An Implementation Guide to Subcontractor Management – CP 45
  - » Wednesday, 11/20/19 **4:30 PM - 5:30 PM** Naples 3
- » Manage Your Pipeline with Costpoint Contract Management – CP 34
  - » Thursday, 11/21/19 **8:30 AM - 9:30 AM** Tampa 1-2
- » How to Make Contract Reporting Work for You – CP 31
  - » Thursday, 11/21/19 **10:50 AM - 11:50 AM** Tampa 1-2



## Next Steps

1. Complete the session survey in the mobile app.
2. Utilize the Post-Event Toolkit to share what you've learned.
3. You can download Continuing Education credit information from your certificate hub link. The link is in the mobile app and will be emailed to you after the conference.

## Downloading Presentations?

- Available presentation PDFs are in the Insight Attendee Portal (Schedule Builder) and in the mobile app.
- Online and mobile app access to this year's presentations expires on March 1, 2020.