Deltek

Deltek Costpoint®

Microsoft® Word Templates FAQs

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Overview

This document provides answers to the most frequently asked questions about the Costpoint Word Template add-in.

Microsoft Word Templates Frequently Asked Questions

What is Word Templates?

Word Templates is 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 with simple forms or reports that are screen-specific and want to run a report quickly.

See the Use Cases section at the end of this document.

Is it included in my subscription?

Yes, it is a part of core Costpoint and will work with any Costpoint screen.

Where can clients get the Microsoft Word Add-In?

For both, On Premise and Cloud clients, the latest version of the add-in is applied with the Costpoint 8.2 installation.

Who can help me setup Word Templates?

The consulting team can assist clients who need help creating company-specific templates.

There will also be a short training video available within the Online Help. Release date TBD.

Are sample templates shipped with Costpoint?

No, but there are some available via KB#96085.

Do users running the templates out of Costpoint need to have the add-in installed?

No.

What other resources are available to clients?

More information is available in the Costpoint 8.2 Online Help on the Videos and Learning Aids page and the Manage Word Templates section.

When was Word Templates released?

The latest version was released with Costpoint 8.2.

What version of Microsoft Word is used with Word Templates?

Two versions of the Costpoint Word Template Add-In are available:

- Legacy version released in Costpoint version 7.1.1 works with Microsoft© Word Desktop Version 2013 or greater. To create a Word template, you must download and install the add-in from Deltek Software Manager. The add-in is not required to generate a report. See **Install the Costpoint Word Template Add-In (Desktop Version 2013 and greater)** in the online Help.
- Costpoint version 8.2 and greater works with Microsoft Office 365. The add-in is included with your Costpoint installation and will require deployment to create Word templates. See **Deploy the Costpoint Word Template Add-In (Office 365)** in the online Help.

Can I use extensions in Word Templates?

Yes. After creating the extensions, you must create a new JSON definition file and upload it to the Word Template.

In the Costpoint Manage Word Templates application, the Create Definition File button now creates a JSON and an XML file. Which one should I use?

The **Costpoint** tab is the latest version released in Costpoint 8.2 and uses the JSON file.

Why do I have 2 Costpoint tabs in MS Word?

The **Costpoint** tab is the is the latest version release in Costpoint 8.2 and works with Microsoft Office 365.

The **COSTPOINT** tab is an older version of the add-in released in Costpoint 7.1.1. Please note that this version is only compatible with Microsoft Word 2013 or greater and is not compatible with Mac, Microsoft Office 365, or Microsoft Excel.

To disable the old version so the tab no longer displays:

1. In Word, click **File » Options** and select Add-ins in the left selector.
2. In the **Manage** list, select **COM Add-ins** and click **Go**.
3. Clear the **Costpoint Word Template AddIn** checkbox and click OK.

If I have 2 Costpoint tabs in MS Word, will they both work?

Yes.

I have Word templates that I created with the old add-in, do I need to do anything for it to work with the new 8.2 add-in?

You do not need to do anything to modify the old templates with the new add-in.

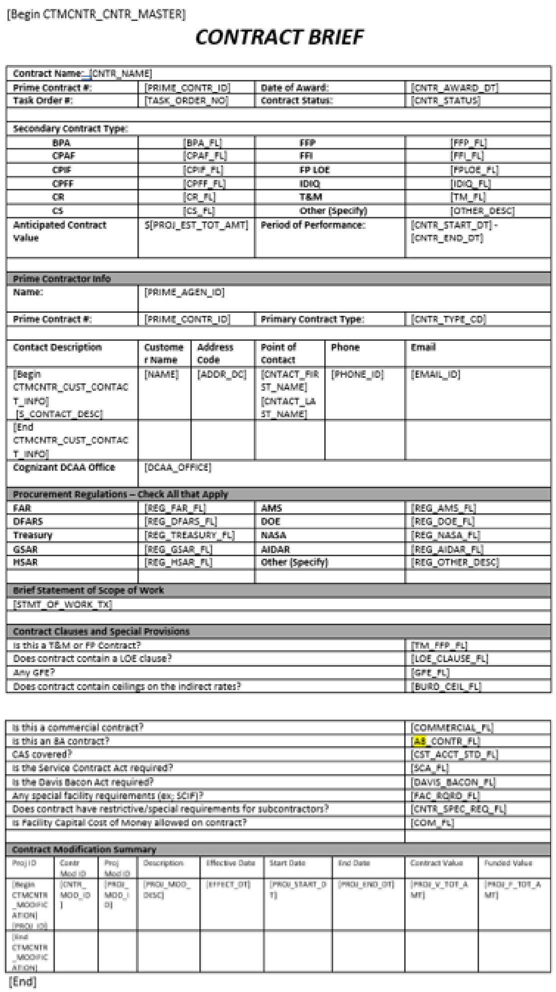
Use Cases

The following use cases provide scenarios for using word templates.

Use Case 1: Contract Overview

The client has an internal kickoff of a new contract award and wants an overview of the contract. They log into Costpoint and open Manage Contracts, select their new contract, and print “Contract Brief”.

In the example below, the left image shows the template with the Costpoint fields in brackets that, when run, will populate with data from this contract, as displayed in the right image.



[Begin CTMCNTR_CNTR_MASTER]

CONTRACT BRIEF

Contract Name: [CNTR_NAME]			
Prime Contract #:	[PRIME_CONTR_ID]	**Date of Award:**	[CNTR_AWARD_DT]
Task Order #:	[TASK_ORDER_NO]	**Contract Status:**	[CNTR_STATUS]
Secondary Contract Type:			
BPA	[BPA_FL]	**FFP**	[FFP_FL]
CPAF	[CPAF_FL]	**FFI**	[FFI_FL]
CPIF	[CPIF_FL]	**FP LOE**	[FPLOE_FL]
CPFF	[CPFF_FL]	**IDIQ**	[IDIQ_FL]
CR	[CR_FL]	**T&M**	[TM_FL]
CS	[CS_FL]	**Other (Specify)**	[OTHER_DESC]
Anticipated Contract Value	$[PROJ_EST_TOT_AMT]	**Period of Performance:**	[CNTR_START_DT] - [CNTR_END_DT]
Prime Contractor Info			
Name:	[PRIME_AGEN_ID]		
Prime Contract #:	[PRIME_CONTR_ID]	**Primary Contract Type:**	[CNTR_TYPE_CD]

Contact Description	**Customer Name**	**Address Code**	**Point of Contact**	**Phone**	**Email**
[Begin CTMCNTR_CUST_CONTACT_INFO] [S_CONTACT_DESC]	[NAME]	[ADDR_DC]	[CNTACT_FIRST_NAME] [CNTACT_LAST_NAME]	[PHONE_ID]	[EMAIL_ID]
[End CTMCNTR_CUST_CONTACT_INFO]					
Cognizant DCAA Office	[DCAA_OFFICE]				

Procurement Regulations – Check All that Apply			
FAR	[REG_FAR_FL]	**AMS**	[REG_AMS_FL]
DFARS	[REG_DFARS_FL]	**DOE**	[REG_DOE_FL]
Treasury	[REG_TREASURY_FL]	**NASA**	[REG_NASA_FL]
GSAR	[REG_GSAR_FL]	**AIDAR**	[REG_AIDAR_FL]
HSAR	[REG_HSAR_FL]	**Other (Specify)**	[REG_OTHER_DESC]

Brief Statement of Scope of Work

[STMT_OF_WORK_TX]

Contract Clauses and Special Provisions	
Is this a T&M or FP Contract?	[TM_FFP_FL]
Does contract contain a LOE clause?	[LOE_CLAUSE_FL]
Any GFE?	[GFE_FL]
Does contract contain ceilings on the indirect rates?	[BURD_CEIL_FL]
Is this a commercial contract?	[COMMERCIAL_FL]
Is this an 8A contract?	[A8_CONTR_FL]
CAS covered?	[CST_ACCT_STD_FL]
Is the Service Contract Act required?	[SCA_FL]
Is the Davis Bacon Act required?	[DAVIS_BACON_FL]
Any special facility requirements (ex; SCIF)?	[FAC_RQRD_FL]
Does contract have restrictive/special requirements for subcontractors?	[CNTR_SPEC_REQ_FL]
Is Facility Capital Cost of Money allowed on contract?	[COM_FL]

Contract Modification Summary

Proj ID	Contr Mod ID	Proj Mod ID	Description	Effective Date	Start Date	End Date	Contract Value	Funded Value
[Begin CTMCNTR_MODIFICATION] [PROJ_ID]	[CNTR_MOD_ID]	[PROJ_MOD_ID]	[PROJ_MOD_DESC]	[EFFECT_DT]	[PROJ_START_DT]	[PROJ_END_DT]	[PROJ_V_TOT_AMT]	[PROJ_F_TOT_AMT]
[End CTMCNTR_MODIFICATION]								

[End]

CONTRACT BRIEF

Contract Name: SE2020 SIR2 FO - TO1			
Prime Contract #:	DTFAWA10D00030	**Date of Award:**	06/11/2017
Task Order #:	0080	**Contract Status:**	AWARDED
Secondary Contract Type:			
BPA	Unchecked	**FFP**	Unchecked
CPAF	Unchecked	**FFI**	Unchecked
CPIF	Unchecked	**FP LOE**	Unchecked
CPFF	Unchecked	**IDIQ**	Checked
CR	Unchecked	**T&M**	Unchecked
CS	Unchecked	**Other (Specify)**	
Anticipated Contract Value	$2,000,000	**Period of Performance:**	06/11/2017 - 12/31/2017
Prime Contractor Info			
Name:	DOT		
Prime Contract #:	DTFAWA10D00030	**Primary Contract Type:**	TM

Contact Description	**Customer Name**	**Address Code**	**Point of Contact**	**Phone**	**Email**
Contracting Officer	FAA	BILL	Kelly Smith	202 566 8739	kelly.smith@faa.gov

Procurement Regulations – Check All that Apply			
FAR	Unchecked	**AMS**	Unchecked
DFARS	Unchecked	**DOE**	Unchecked
Treasury	Unchecked	**NASA**	Unchecked
GSAR	Unchecked	**AIDAR**	Unchecked
HSAR	Unchecked	**Other (Specify)**	FAA AMS (Acquisition Management System)

Brief Statement of Scope of Work

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 Clauses and Special Provisions	
Is this a T&M or FP Contract?	T&M
Does contract contain a LOE clause?	No
Any GFE?	No
Does contract contain ceilings on the indirect rates?	No
Is this a commercial contract?	No
Is this an 8A contract?	No
CAS covered?	No
Is the Service Contract Act required?	No
Is the Davis Bacon Act required?	No
Any special facility requirements (ex; SCIF)?	No
Does contract have restrictive/special requirements for subcontractors?	No
Is Facility Capital Cost of Money allowed on contract?	No

Contract Modification Summary

Proj ID	Contr Mod ID	Proj Mod ID	Description	Effective Date	Start Date	End Date	Contract Value	Funded Value
10225							2,000,000	750,000
10225	C00000		Contact Change	04/09/2018			0	0
10225.01	C00000	0001	Incremental Funding	06/06/2018	12/01/2017	12/31/2018	1,000,000	500,000
10225.01		0000	Initial Award	12/01/2017	12/01/2017	11/30/2018	1,000,000	250,000
10225.01							2,000,000	750,000
10225.02		0000	Initial Award	12/01/2017	12/01/2017	11/30/2018	6,000	6,000
10225.02							6,000	6,000

Use Case 2: Customer Information List

I'd like to get a quick list of my customer information, which will include all associated addresses and contacts.

Based on the customer(s) selected, all address codes and related contacts will populate in the formatted template.

ACME Inc.

Client Type: COMMERCIAL **Status:** Ok
Payment Terms: NET 30 **Customer Type:** COMMERCIAL
Website:

Address Code	Address Line 1	Address Line 2	City	State	Zip	Phone	Email
BILL	Attention: Accounts Payable	35995 Stevenson Blvd	Freemont	CA	94536	510-791-2532	
Name: Maxine Jackson, Email: Phone: 703-442-8666							
HERNDON	13880 Dulles Corner Lane		Herndon	VA	20171		
SHIP1	Attention: Receiving	4258 Hedding Street	San Jose	CA	95652	408-785-2776	

Use Case 3: Vendor List

I'd like to get a quick list of my vendors information, which will include all associated addresses and contacts.

Based on the vendor(s) selected, all address codes and related contacts will populate in the formatted template.

Vendor Name: Honeywell Avionics (A100001)

Vendor Status: Give Warning

Address Code	Address	Address	City	State	Zip Code
ADDR1	2300 Union Hills		Phoenix	AZ	85032
Name: John Smith; Title: CEO Email: John.Smith@acme.com Phone: 398-383-9837 Name: Sunny Sand; Title: Email: Phone: 11111111					
ADDR2	P.O. Box 72994		Fairfax	VA	22102
Name: Dicky Betts dbett@acmesc.com; Title: Email: Phone: 322.555.3423					

Use Case 4: Vendor Rating Report

I want a vendor rating report showing the scores from the vendors last performance review.

Subcontractor: Balmar Consulting (V100013)

Subcontract: HHS-Balmar-Subc-0001 (SUBC-000000000000001)

Project ID: 10370.IT Project Name: SLA MANAGEMENT

Max Total Score: 105 Percent: 89% Total Score: 93Vendor Score Key: 4

Date Reviewed:

RESPONSIVENESS/INNOVATION			
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 to communicate if there is an issue and track down the employees to address questions.
Vendor contact is knowledgeable on products/services	Meets Some	6	
Vendor communicates all relevant information efficiently		5	
Company can easily find right vendor contract when needed		4	
Vendor provides "best in class" practices		3	
CUSTOMER SERVICE, QUALITY AND DELIVERY			
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	

Use Case 5: Client Letter

My contract has reached 75% of funding, and I need to send a letter to my client.

The template includes the drafted letter and populates with the contract information, highlighted in yellow when executed.

HHS

Michelle Rodriguez, COR

Phone: | Fax:

MichelleRodriguez@HHS.gov

RE: 52.232-22. Limitation of Funds

Dear: Michelle Rodriguez

This letter is to notify you that Master Contract No HHSN847351200567W Task Order No HHSP233201700137W **will exceed 75** percent of the total amount so far allotted to the contract by the Government. The current contract funding available for payment is (*dollar amount).* Please see the latest Contract Status and Management Report that shows we will exceed the current funding level of the contract with in the next 60 days.

We are sending this letter in accordance with FAR 52.232-22, Limitation of Funds, paragraph (c), “The Contractor shall notify the Contracting Officer in writing whenever it has reason to believe that the costs it expects to incur under this contract in the next 60 days, when added to all costs previously incurred, will exceed 75 percent of (1) the total amount so far allotted to the contract by the Government.”

If you have any questions or comments please feel free to contact the undersigned.

Sincerely,

John Doe

Contract Manager

Use Case 6: Nondisclosure Agreement

We plan to work with this new subcontractor and need to send them a nondisclosure agreement.

The template includes the drafted form and populates with the subcontractor name, highlighted in yellow, when executed.

BASIC NONDISCLOSURE AGREEMENT

This Nondisclosure Agreement (the "Agreement") is entered into by and between **Applied Technologies Inc.** ("Disclosing Party") and **Balmar Consulting**, ("Receiving Party") for the purpose of preventing the unauthorized disclosure of Confidential Information as defined below. The parties agree to enter into a confidential relationship with respect to the disclosure of certain proprietary and confidential information ("Confidential Information").

1. Definition of Confidential Information. For purposes of this Agreement, "Confidential Information" shall include all information or material that has or could have commercial value or other utility in the business in which Disclosing Party is engaged. If Confidential Information is in written form, the Disclosing Party shall label or stamp the materials with the word "Confidential" or some similar warning. If Confidential Information is transmitted orally, the Disclosing Party shall promptly provide a writing indicating that such oral communication constituted Confidential Information.

2. Exclusions from Confidential Information. Receiving Party's obligations under this Agreement do not extend to information that is: (a) publicly known at the time of disclosure or subsequently becomes publicly known through no fault of the Receiving Party; (b) discovered or created by the Receiving Party before disclosure by Disclosing Party; (c) learned by the Receiving Party through legitimate means other than from the Disclosing Party or Disclosing Party's representatives; or (d) is disclosed by Receiving Party with Disclosing Party's prior written approval.

3. Obligations of Receiving Party. Receiving Party shall hold and maintain the Confidential Information in strictest confidence for the sole and exclusive benefit of the Disclosing Party. Receiving Party shall carefully restrict access to Confidential Information to employees, contractors and third parties as is reasonably required and shall require those persons to sign nondisclosure restrictions at least as protective as those in this Agreement. Receiving Party shall not, without prior written approval of Disclosing Party, use for Receiving Party's own benefit, publish, copy, or otherwise disclose to others, or permit the use by others for their benefit or to the detriment of Disclosing Party, any Confidential Information. Receiving Party shall return to Disclosing Party any and all records, notes, and other written, printed, or tangible materials in its possession pertaining to Confidential Information immediately if Disclosing Party requests it in writing.

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com