




Deltek

Deltek Costpoint®

Microsoft® Word Templates FAQs

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Contents

Microsoft Word Templates Frequently Asked Questions.....	1
What is Word Templates?	1
Is it included in my subscription?.....	1
Where can clients get the Microsoft Word Add-In?	1
Who can help me setup Word Templates?	1
Are sample templates shipped with Costpoint?	1
What other resources are available to clients?	1
When was this released?	1
What version of Microsoft Word is used with Word Templates?	1
Use Cases.....	2
Use Case 1	2
Use Case 2.....	3
Use Case 3.....	4
Use Case 4.....	5
Use Case 5.....	6
Use Case 6.....	7

Microsoft Word Templates Frequently Asked Questions

What is Word Templates?

Word Templates is a new 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.

For more information, see [Use Cases](#).

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 on-premises clients, the add-in is available for download on Deltek Software Manager (DSM).

For clients that do not have access to DSM, the add-in is available via KB# 96574.

Who can help me setup Word Templates?

If clients need help creating company-specific templates, the consulting team can assist.

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.

What other resources are available to clients?

- [DeltekCostpoint711CostpointWordTemplateAddInInstallationGuide.pdf](#)
- [DeltekCostpoint711ReleaseNotesManageWordReportTemplatesSYMWRPTM.pdf](#)

When was this released?

This tool was released in AppJar 083118.

What version of Microsoft Word is used with Word Templates?

Microsoft Word 2013 or higher.

This will not work with Mac or Microsoft Office 365 or with Microsoft Excel.

Use Cases

Use Case 1

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

See the example below. The first image shows the template with the Costpoint fields in brackets that when run, populates with data from this contract, as displayed in the second 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]	
Estimated Actual Costs (Total Value Cost)	[\$[PROJ_V_COST_AMT]	Estimated Fee (Total Value Fee)	[\$[PROJ_V_FEE_AMT]	Total Price (Total Value)	[\$[PROJ_V_TOT_AMT]
Estimated Actual Costs (Total Funded Cost)	[\$[PROJ_F_COST_AMT]	Estimated Fee (Total Funded Fee)	[\$[PROJ_F_FEE_AMT]	Total Price (Total Funded)	[\$[PROJ_F_TOT_AMT]
Period of Performance From:	[CNTR_START_DT]	Period of Performance To:		[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]	[CONTACT_FIRST_NAME] [CONTACT_LAST_NAME]	[PHONE_ID]	[EMAIL_ID]
[End CTMCNTR_CUST_CONTACT_INFO]					

CONTRACT BRIEF

Contract Name: DOT FAA DO WJHTC <u>Info Exp</u>					
Prime Contract #:	DTFAWA10D00030		Date of Award:	06/11/2017	
Task Order #:	DTFAWA10D00030-0080		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)		
Estimated Actual Costs (Total Value Cost)	\$245,000.00		Estimated Fee (Total Value Fee)	\$0.00	Total Price (Total Value) \$245,000.00
Estimated Actual Costs (Total Funded Cost)	\$244,300.00		Estimated Fee (Total Funded Fee)	\$0.00	Total Price (Total Funded) \$244,300.00
Period of Performance From:	06/12/2017		Period of Performance To:	12/30/2017	
Prime Contractor Info					
Name:	DOT				
Prime Contract #:	DTFAWA10D00030		Primary Contract Type:	TM	
Contact Description	Customer Name	Address Code	Point of Contact	Phone	Email
Contract Representative	FAA	BILL	Kenneth Carther	202 267 8460	kenneth.m.carter@faa.gov
Contracting Officers	FAA	BILL	Kelly Mitchells	2025668739	kelly.mitchells@faa.gov

Use Case 2

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

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

I'd like to view the vendor rating report showing the scores from the vendor's last performance review.

Subcontractor: ~~Balmar~~ Consulting (V100013)

Subcontract: HHS-Balmar-Subc-0001 (SUBC-0000000000000001)

Project ID: 10370.IT Project Name: SLA MANAGEMENT

Max Total Score: 105 Percent: 89% Total Score: 93 Vendor 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 appopriately	Fully Meets	7	
Vendor meets services/support commitments	Fully Meets	7	
		0	

Use Case 5

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

We plan to work with this new subcontractor and need to send them an NDA 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.



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