Deltek INSIGHT › 2019

CP-13:
Getting Started With Organizational Budgeting

Lynda Porter, Deltek
Lawrence Eaton, Deltek
Janet O'Brien, Deltek

OVERVIEW

There is detailed information in the session slides for you to reference when you are preparing your Organizational Budget setup.

During the session, we will highlight the key points and key setup decisions.

Feel free to ask questions at any time!

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Agenda

- Introductions.
- Navigation of Costpoint Planning.
- What is an Organizational Budget?
- Important Configuration Choices and What They Mean.
- Initialize the Org Budget Cycle.
- Creating an Org Budget from Scratch:
  - Traditional Method.
    - Plug Project Processing.
  - Integrated Method.

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Introductions

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Presenters

Lynda Porter
Deltek Adv Designer

Lynda has been with Deltek for over 12 years and has worked with Costpoint as an A&F Consultant and in Deltek University.

Currently Lynda is an Advisory Designer for Costpoint Planning.

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Presenters

Mike Eaton
Deltek Sr Adv Software Architect

Mike has been involved in the design, programming and support of the Budgeting & Planning product since 2007.

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Presenters

Janet O’Brien
Deltek Product Director

Janet has been with Deltek for roughly 23 years and has worked with Costpoint in customer care, engineering and product management.

Currently Janet is the product director for Costpoint Planning and manages the Costpoint Early Adopter program.

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Navigation of Costpoint Planning

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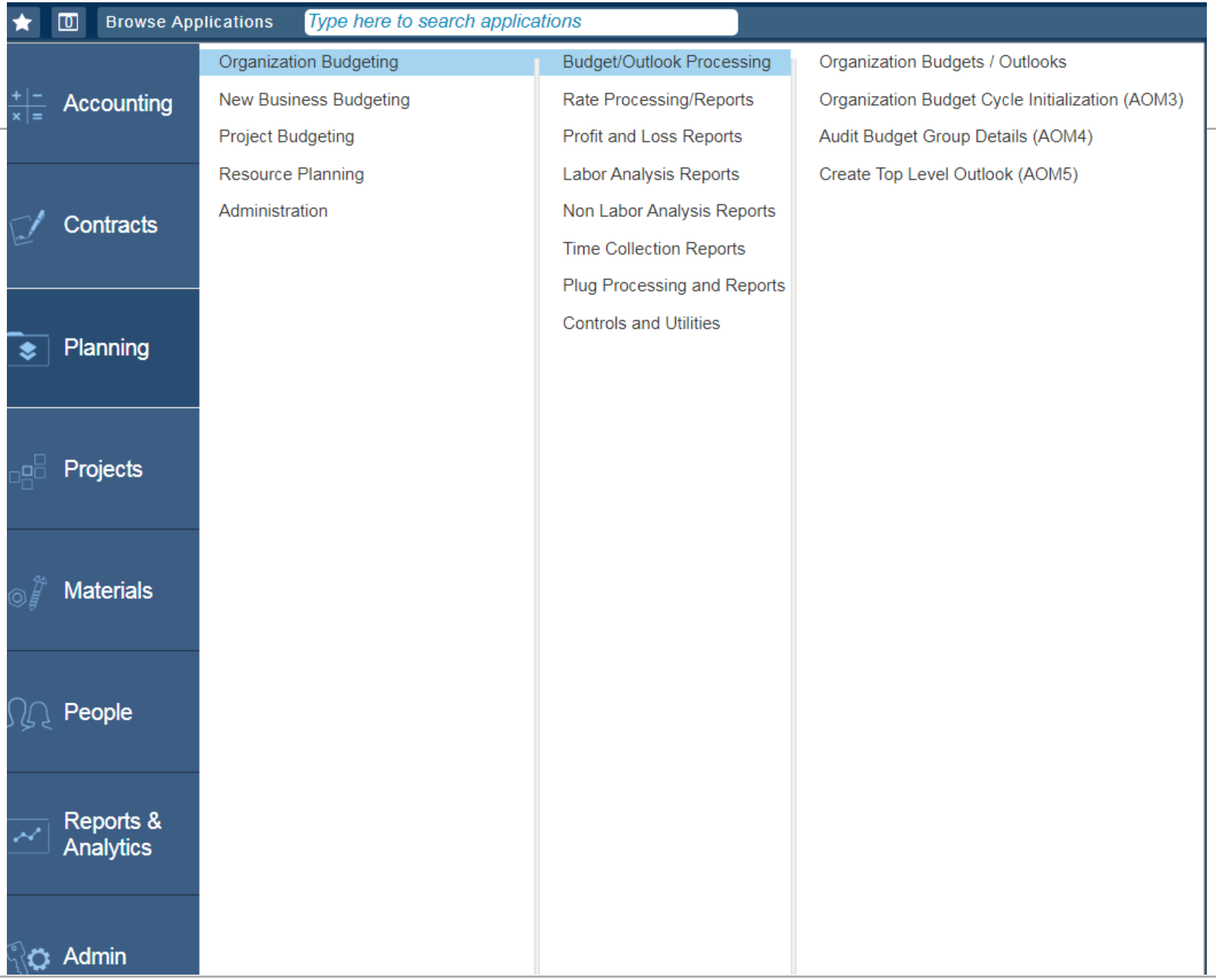
Navigation

- Planning is a separate Domain within Costpoint.
- The modules are Organization, New Business and Project Budgeting as well as Resource Planning and Administration.



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What is an Organizational Budget?

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Organizational Budget – Basics

- Budgets by Orgs are created for one fiscal year at a time.
- You must complete the ‘Organization Budget Cycle Initialization’ before creating budgets for the year.
- An important consideration is the level at which you will budget.
- The recommendation is to budget on Org levels at or above where your actual costs/revenue are hitting.
- If actual costs/revenues hit a higher level Org than the budget level, then you will need to create ‘top level outlooks’ to review variances.
- If Forward Rates are being computed above your budgeting level, then pseudo budgets with allocations will be created when you post allocations.
- You cannot create a budget for more than one node in the same branch of the org tree hierarchy.

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Background

- The Org Budgets have 4 levels of status:
  - Working
  - Incomplete
  - Complete
  - Approved

These allow a company to have business rules regarding moving a budget from one status to another and assign appropriate resources for reviews.

NOTE: Working status budgets/outlooks are not included in reporting.

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Important Configuration Decisions

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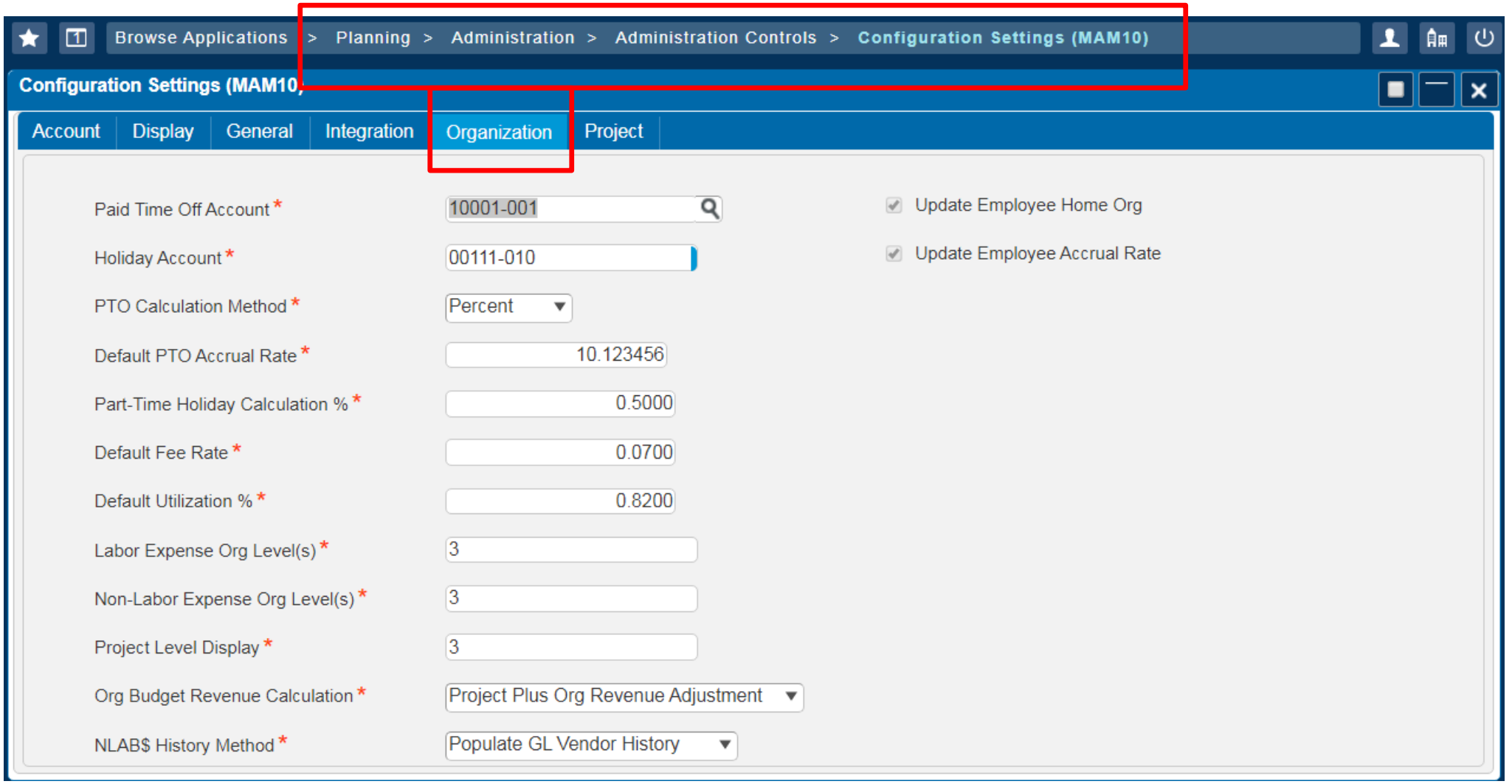
Org Budget - Configuration Settings



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Organization Configuration Settings – What do they mean?

- **Paid Time Off Account and Holiday Account:** Choose the General Ledger Account that should be used as a default for PTO and Holiday Accounts in Org Budgets and Outlooks.
- **PTO Calculation Method**: Choose one of the following PTO calculation method:
  - Hours – Enter whole hour numbers when budgeting.
  - Percent - Enter percentage of annual accrual when budgeting.
- **Default PTO Accrual Rate:** Estimate this value using the total number of accrued hours per fiscal year divided by the total number of sub-periods in the fiscal year. This value is only used when Vacation Types are invalid or not entered.
- **Part Time Holiday Calculation %:** The value entered in this field determines whether Planning calculates holiday for part-time employees whose FTE (full-time equivalent) percent is less than or equal to the rate entered in this field. This field defaults to 0.5000.

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Organization Configuration Settings – What do they mean?

- **Default Fee Rate:** If you choose to calculate Revenue in the Org Budget, instead of updating it from the Project Budget, the rate entered here (for example, 0.0700 [7%]) is used as the default fee rate.
- **Default Utilization %:** Decide what percent of employee hours should be attributed to direct labor versus indirect labor. For example, if you enter .82 as the default value, 82% of the employee's hours will be classified as direct labor, and 18% will be Indirect. Note that if you use Integrated Budgeting, when the labor is uploaded from the Project Budgets to the Org Budgets, this default will be overwritten.
- **Labor Expense Org Levels(s):** Decide how many levels of the Org structure should display for users in Lookup choices. If you wanted two levels to display separate by a comma e.g. 2,3.
- **Non Labor Expense Org Level(s):** The values entered in this field represent the Org levels that will display in Lookup lists for non-labor expense budgets.

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Organization Configuration Settings – What do they mean?

- **Project Level Display:** The values entered in this field represent the Org levels that will display in Lookup lists for **Project Budgeting.**
- **Non Labor Dollar History Method:** The value selected here is used when creating the first Org budget. Choose from the following options:
  - A. Populate the NLAB$ tab with Prior Year GL Vendor history.
  - B. Populate the NLAB$ tab with Prior Year GL Account history.
  - C. Do not populate the NLAB$ tab.

  Note that if you do not populate the NLAB$ tab, you will need to enter the Non Labor Dollar budgets manually.

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Organization Configuration Settings – What do they mean?

- **Update Employee Home Org:** This check box controls whether the employee home Org ID in the Employee Rates subtask of the Organization Budget Cycle Initialization (AOM3) screen is updated to reflect the current Home Org during the refresh process. (This applies only to employee records that are not locked.)
- **Update Employee Accrual Rate Checkbox:** This check box controls whether the PTO accrual rate in the Employee Rates subtask of the Organization Budget Cycle Initialization (AOM3) screen is updated to reflect the current accrual rate during the refresh process. (This applies only to employee records that are not locked.)

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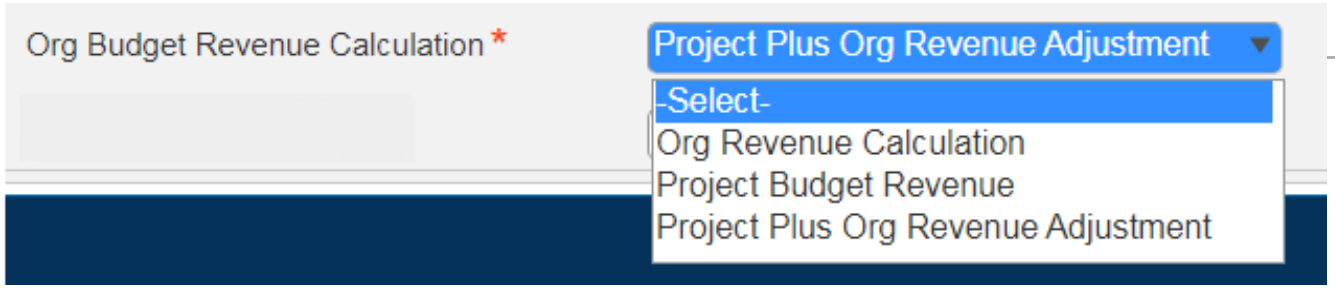
Organization Configuration Settings – What do they mean?



Org Budget Revenue Calculation: A fundamental decision is required ideally before starting the Post Installation Processes, regarding the Org Budget. The setting is by CP Company, not Database wide.

- **Traditional Method - Org Revenue Calculation** Setup. A 'Plug' number will be calculated to show the variance between the Org Budget Revenue and the Project Budget Revenue. Note that it is possible to mass update Labor and Non-Labor from the Project Budgets while using the Traditional Method, but Revenue is calculated in the Org Budgets.
- **Integrated Method** – **Project Budget Revenue** or **Project Plus Org Revenue Adjustment** This option allows Revenue, Labor and Non-Labor updates to the Org Budgets from the Project and New Business Budgets. With an option to allow Revenue Adjustments in the Org Budgets. Ability to manually enter Org Budgets is disabled.

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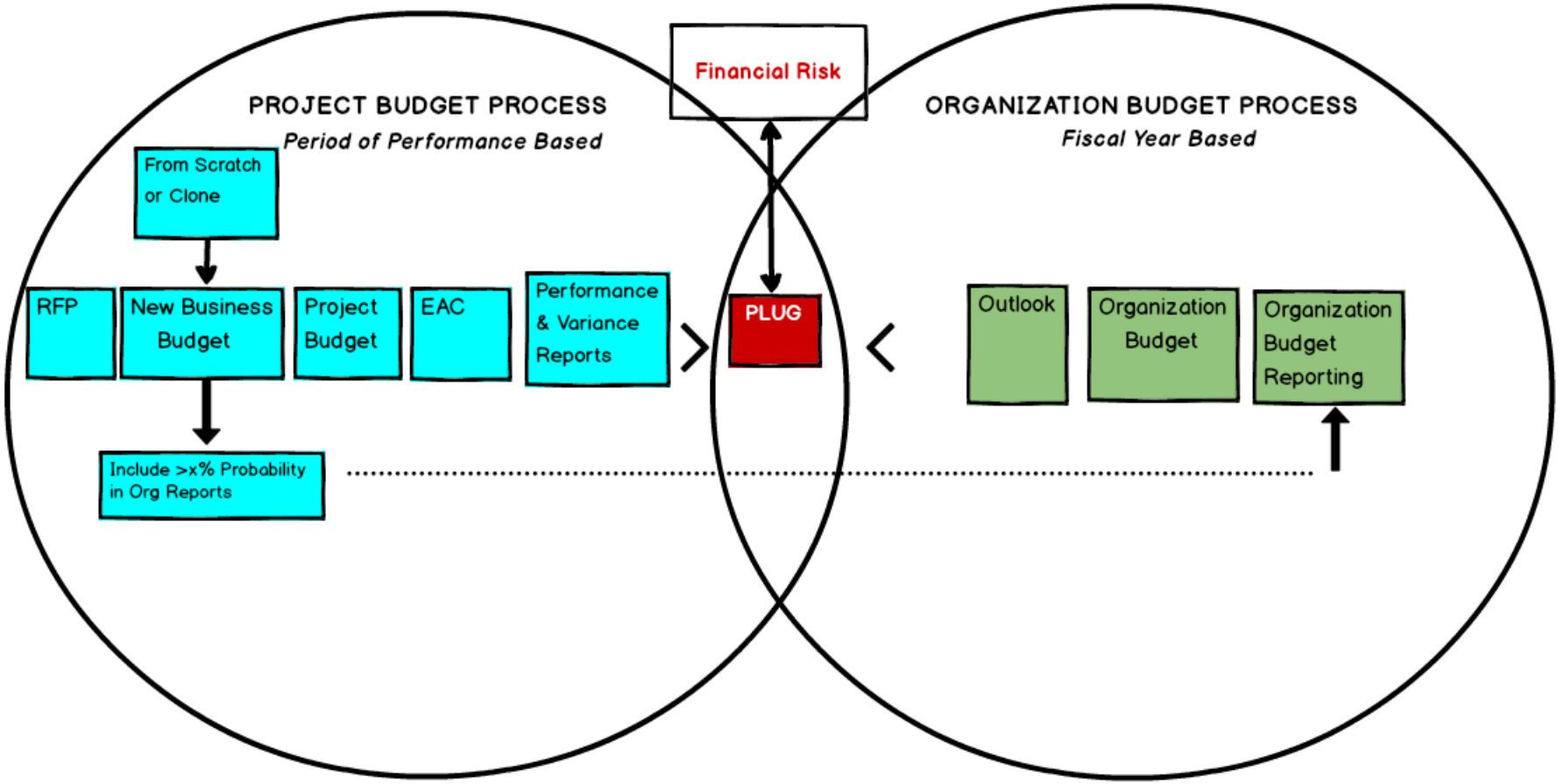
Organization Configuration Settings – What do they mean?

» Org Budget Revenue Calculation: **Traditional Method**



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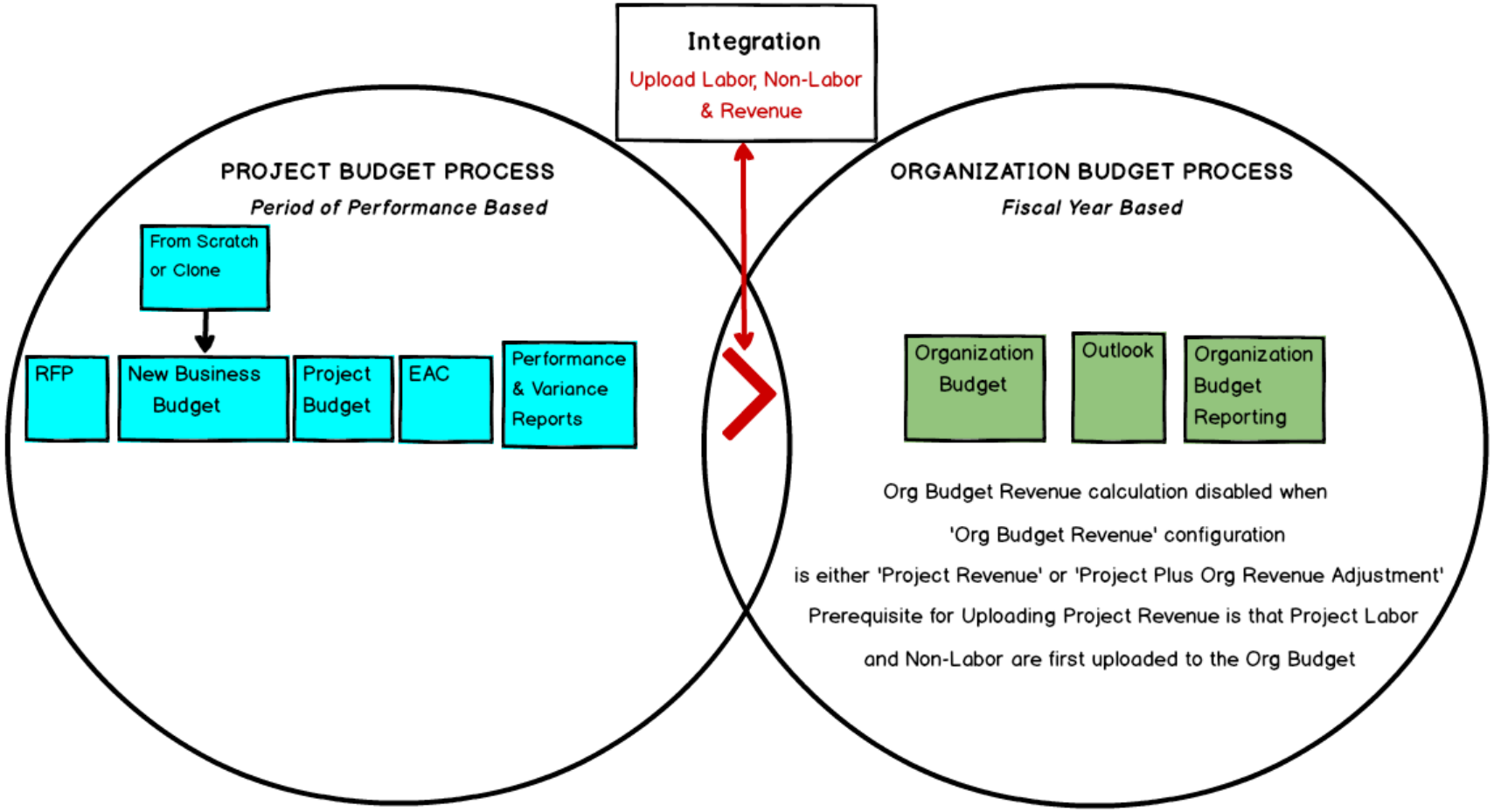
Organization Configuration Settings – What do they mean?

» Org Budget Revenue Calculation: **Integrated Method**



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Initialize the Org Budget Cycle

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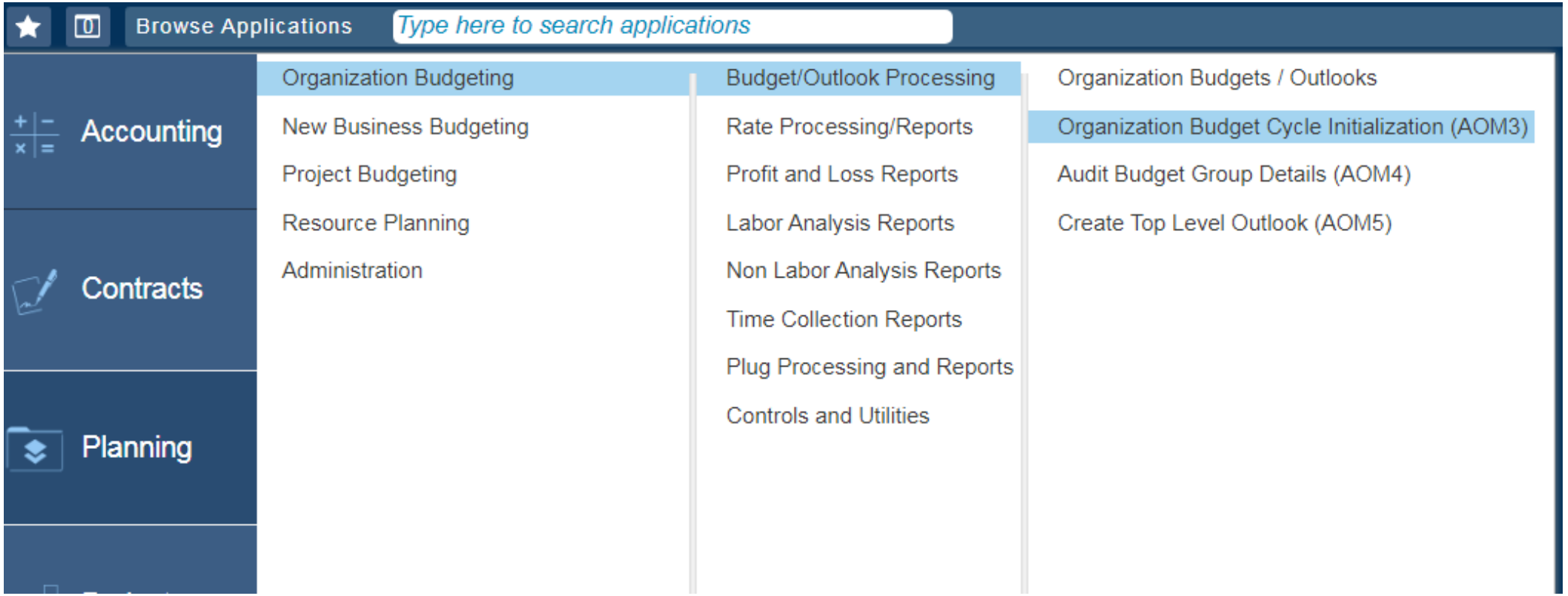
Organization Budget Cycle Initialization - Navigation



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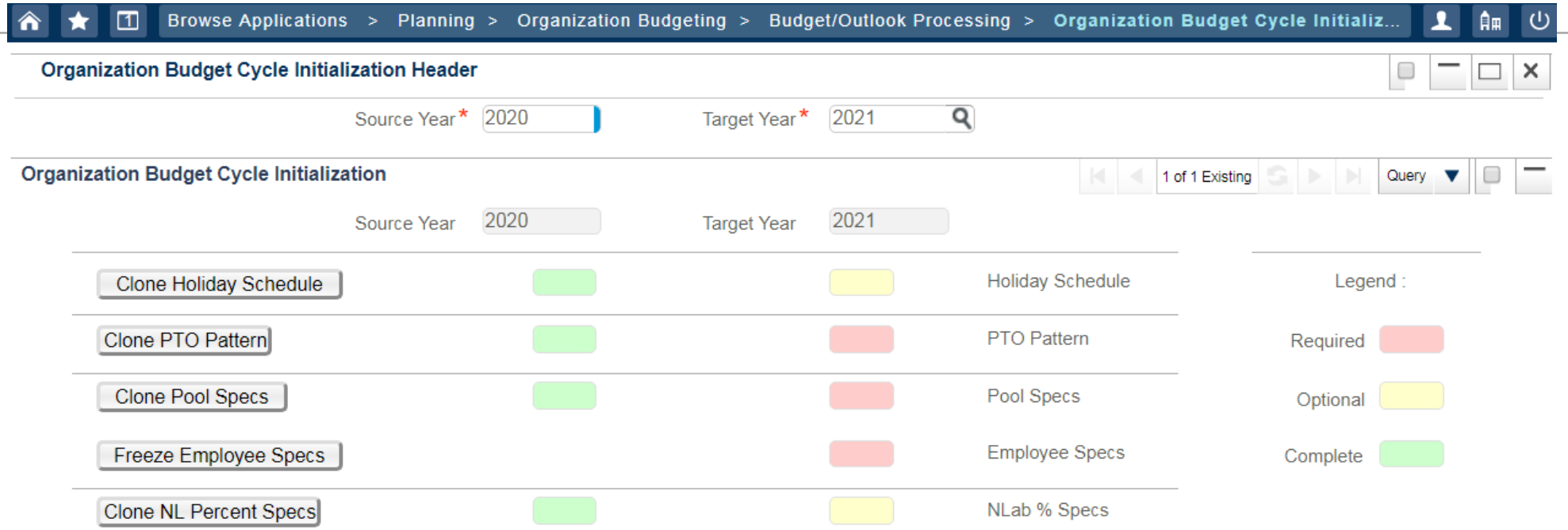
Organization Budget Cycle Initialization



- Must be done before starting budgets for the year.

Holidays PTO Pattern Pool Base Acct Pool Cost Acct NLAB Percent Base NLAB Percent Types

- PTO, Pools and Employee Specs are required fields.
- Holiday and Non-Labor % are Optional.
- Note: Holiday schedule is used on the project budgeting side to calculate available hours for each period.
- Can clone from any previously initialized year.

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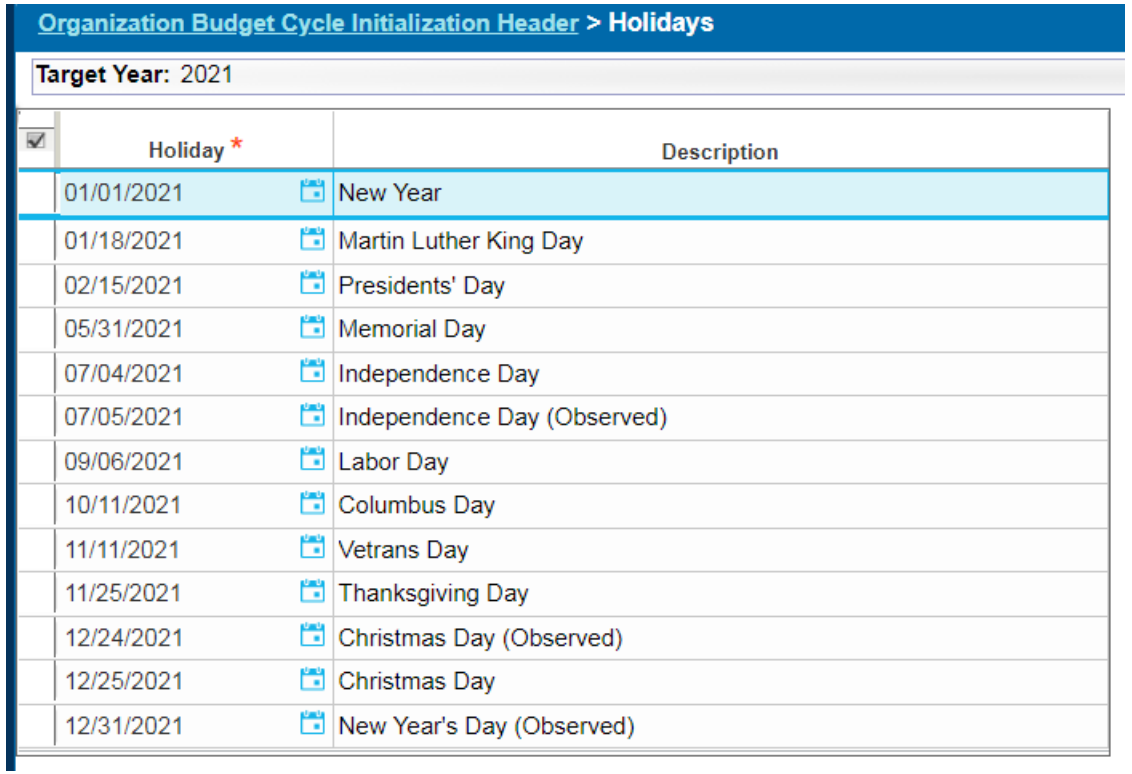
Organization Budget Cycle Initialization – Holiday Schedule

» **Clone Holiday Schedule:** The Holiday schedule is used on the project budgeting side to calculate available hours for each period.



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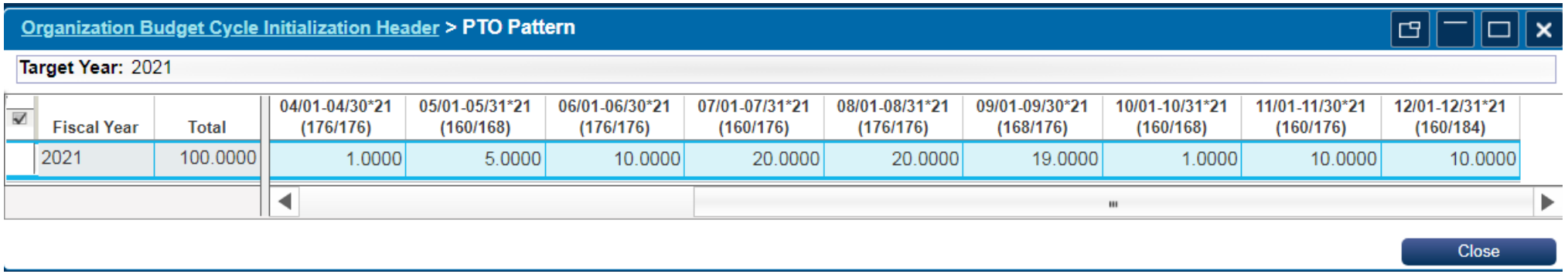
Organization Budget Cycle Initialization – PTO Schedule

- Clone PTO Pattern: It is applied to all employees in the org during the creation of the Org budget.
- It represents the Percent of annual hours OR Hours (based on configuration settings).
- The total should be 100. The period numbers are editable.
- The numbers in the column header in parenthesis represent the total available work hours minus Holiday hours in a period for the entire ORG, not one individual.



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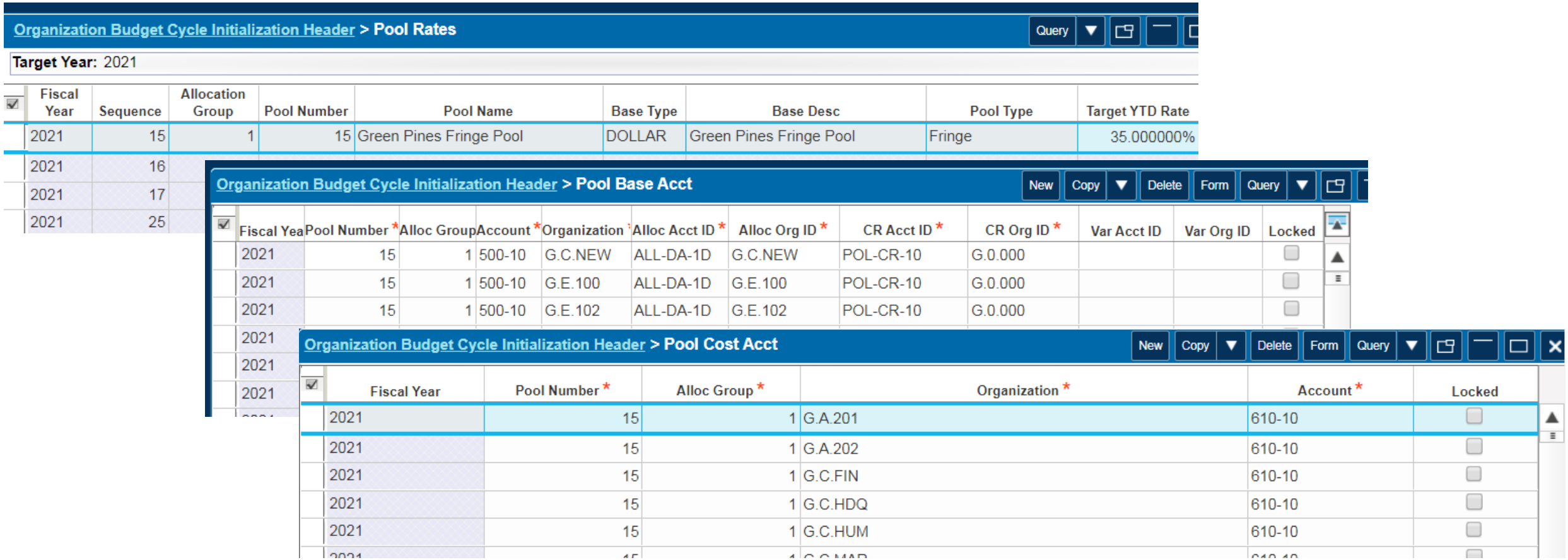
Organization Budget Cycle Initialization - Pools

» **Clone Pool Specs:** Pool setup is a required field and can be cloned from previous initialized years. The Pools set up here are for the Organization Budgets/Outlooks only.



Organization Budget Cycle Initialization Header > Pool Rates

Query

Target Year: 2021

Fiscal Year	Sequence	Allocation Group	Pool Number	Pool Name	Base Type	Base Desc	Pool Type	Target YTD Rate
2021	15	1	15	Green Pines Fringe Pool	DOLLAR	Green Pines Fringe Pool	Fringe	35.000000%
2021	16							
2021	17							
2021	25							

Organization Budget Cycle Initialization Header > Pool Base Acct

New | Copy | Delete | Form | Query

Fiscal Yea	Pool Number *	Alloc Group	Account *	Organization *	Alloc Acct ID *	Alloc Org ID *	CR Acct ID *	CR Org ID *	Var Acct ID	Var Org ID	Locked
2021	15	1	500-10	G.C.NEW	ALL-DA-1D	G.C.NEW	POL-CR-10	G.0.000			
2021	15	1	500-10	G.E.100	ALL-DA-1D	G.E.100	POL-CR-10	G.0.000			
2021	15	1	500-10	G.E.102	ALL-DA-1D	G.E.102	POL-CR-10	G.0.000			
2021											
2021											
2021											

Organization Budget Cycle Initialization Header > Pool Cost Acct

New | Copy | Delete | Form | Query

Fiscal Year	Pool Number *	Alloc Group *	Organization *	Account *	Locked
2021	15	1	G.A.201	610-10	
2021	15	1	G.A.202	610-10	
2021	15	1	G.C.FIN	610-10	
2021	15	1	G.C.HDQ	610-10	
2021	15	1	G.C.HUM	610-10	

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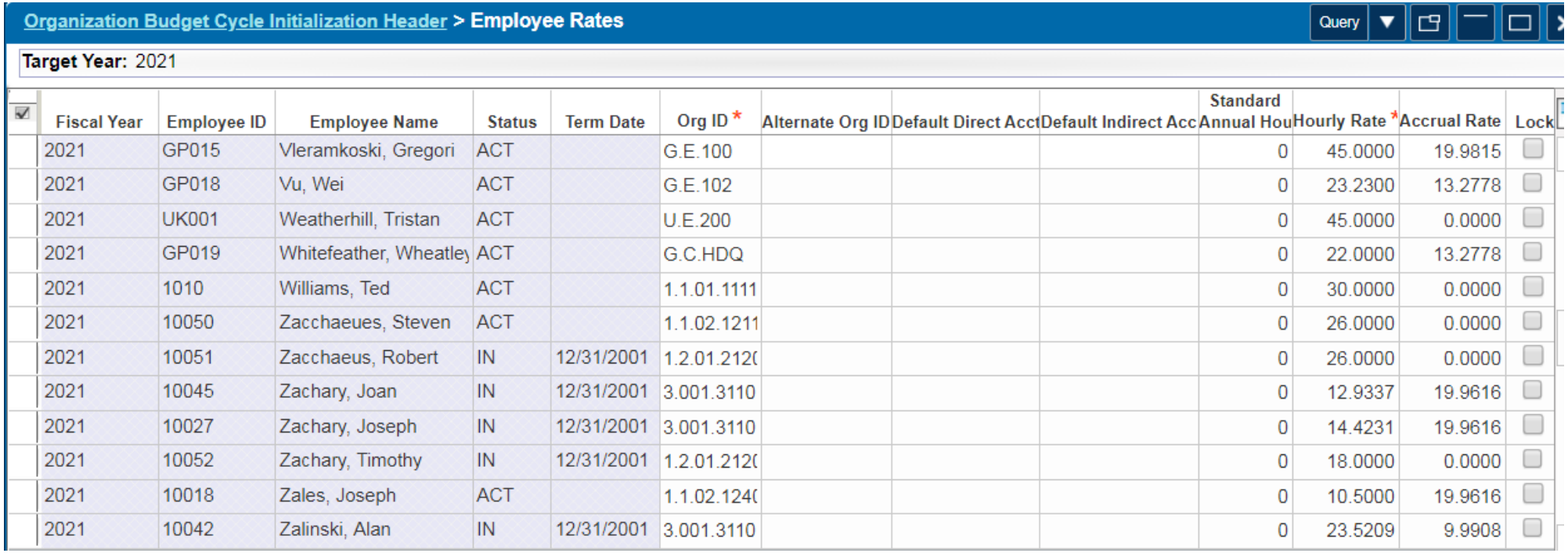
Organization Budget Cycle Initialization – Employee Rates

- **Freeze Employee Specs:** Current rates are brought in from the Costpoint>People>Employee Master application. When you 'Freeze Employee Rates', then they increase by the escalation amount. Certain fields are editable. The ‘Accrual Rate’ refers to Leave Accrual rates. The lock flag at the end of the row is to prevent overwriting the record if the Re-Freeze Employee Specs is executed.



Organization Budget Cycle Initialization Header > Employee Rates

Query

Target Year: 2021

Fiscal Year	Employee ID	Employee Name	Status	Term Date	Org ID *	Alternate Org ID	Default Direct Acct	Default Indirect Acc	Standard Annual Hou	Hourly Rate *	Accrual Rate	Lock
2021	GP015	Vleramkoski, Gregori	ACT		G.E.100				0	45.0000	19.9815	
2021	GP018	Vu, Wei	ACT		G.E.102				0	23.2300	13.2778	
2021	UK001	Weatherhill, Tristan	ACT		U.E.200				0	45.0000	0.0000	
2021	GP019	Whitefeather, Wheatley	ACT		G.C.HDQ				0	22.0000	13.2778	
2021	1010	Williams, Ted	ACT		1.1.01.1111				0	30.0000	0.0000	
2021	10050	Zacchaeues, Steven	ACT		1.1.02.1211				0	26.0000	0.0000	
2021	10051	Zacchaeus, Robert	IN	12/31/2001	1.2.01.212(				0	26.0000	0.0000	
2021	10045	Zachary, Joan	IN	12/31/2001	3.001.3110				0	12.9337	19.9616	
2021	10027	Zachary, Joseph	IN	12/31/2001	3.001.3110				0	14.4231	19.9616	
2021	10052	Zachary, Timothy	IN	12/31/2001	1.2.01.212(				0	18.0000	0.0000	
2021	10018	Zales, Joseph	ACT		1.1.02.124(				0	10.5000	19.9616	
2021	10042	Zalinski, Alan	IN	12/31/2001	3.001.3110				0	23.5209	9.9908	

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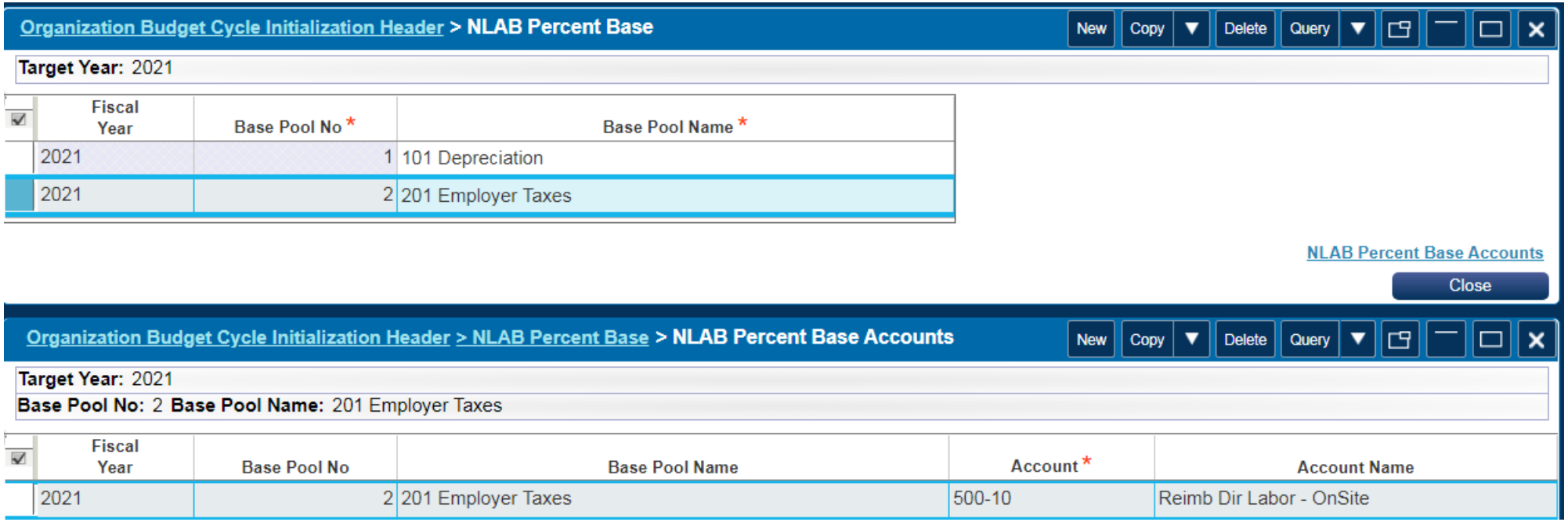
Organization Budget Cycle Initialization – NLAB Percent

- **Clone NL Percent Specs:** The NLAB Percent process allows you to create a budget cost as a % of another cost e.g. Employer Taxes as a % of labor costs. There are 2 setups done in the Initialization, Clone allows you to copy a prior year for these 2 setups:
- 1. NLAB Percent Base – creates the 'dummy pools' and base accounts.



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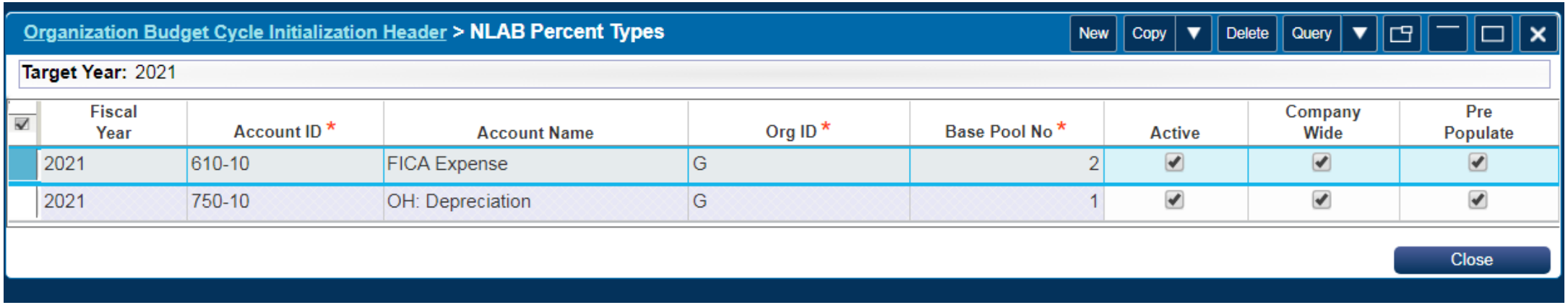
Organization Budget Cycle Initialization – NLAB Percent Contd.

» 2. NLAB Percent Types – assigns the account/s will receive the calculated % cost.



» **Company Wide** when checked, includes the cost account in the base of ALL Orgs.

» **Prepopulate**, when checked, makes the entered information available in the subtask of Org Budgets set up after the initialization. Existing Org Budgets will need to have the Non Labor Percent subtasks setup individually.

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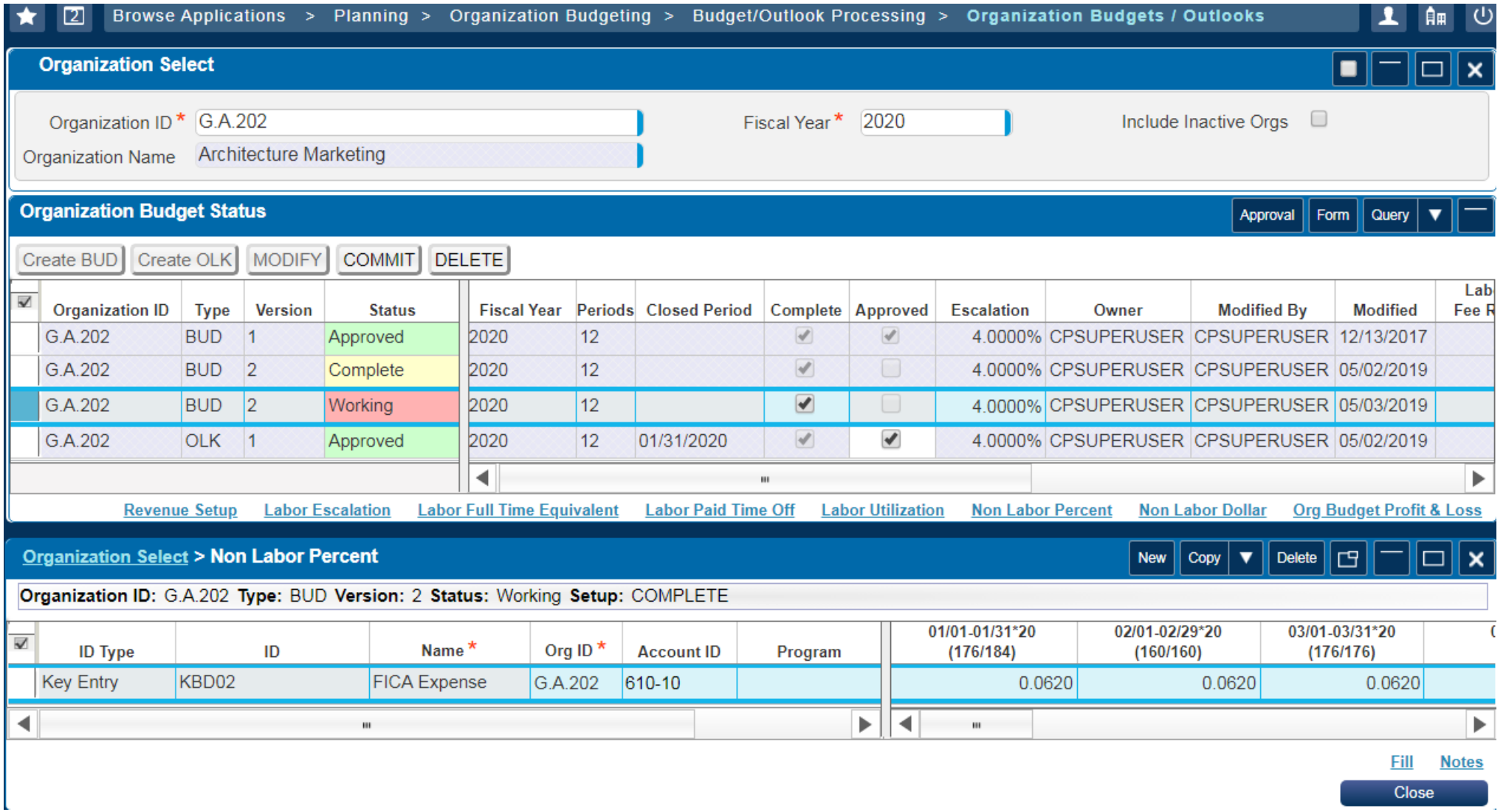
Organization Budget Cycle Initialization – NLAB Percent Contd.

3. The 3rd step to setup the NLAB Percent process is done in the individual Org Budgets 'Non Labor Percent' subtask.

This is where the % is set up by period.

Shown here FICA will be 6.2% of the Base Accounts.



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Creating an Org Budget

Traditional Method

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Traditional Method Org Budget

- **Org Revenue Calculation** Setup.
- A ‘Plug’ number will be calculated to show the variance between the Org Budget Revenue and the Project Budget Revenue.
- Note that it is possible to mass update Labor and Non-Labor from the Project Budgets while using the Traditional Method, but Revenue is calculated in the Org Budgets.

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Traditional Method Org Budgeting – Create Budget

- After the initial annual budget has been established, further budget versions can be created throughout the fiscal year.
- Actual Org Revenues and Costs are integrated into ‘forecasts’ automatically when an Outlook is created.
- An organization budget can be created at any level in the organization structure, but only for one org in any given branch. The recommendation is to budget on Org levels at or above where your actual costs/revenue are hitting.

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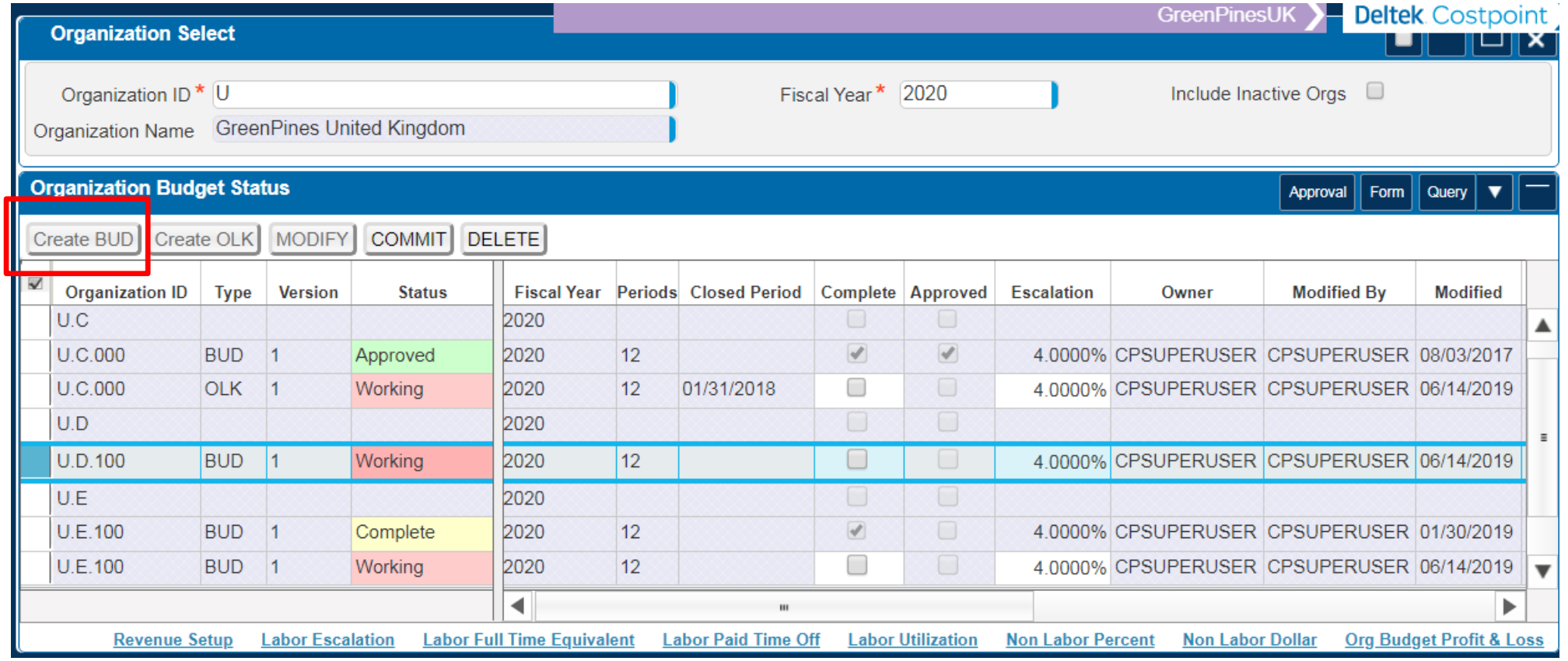
Traditional Method Org Budgeting – Create Budget

- Choose the level to be budgeted and click ‘Create Bud’.
- A Working Status budget is created.



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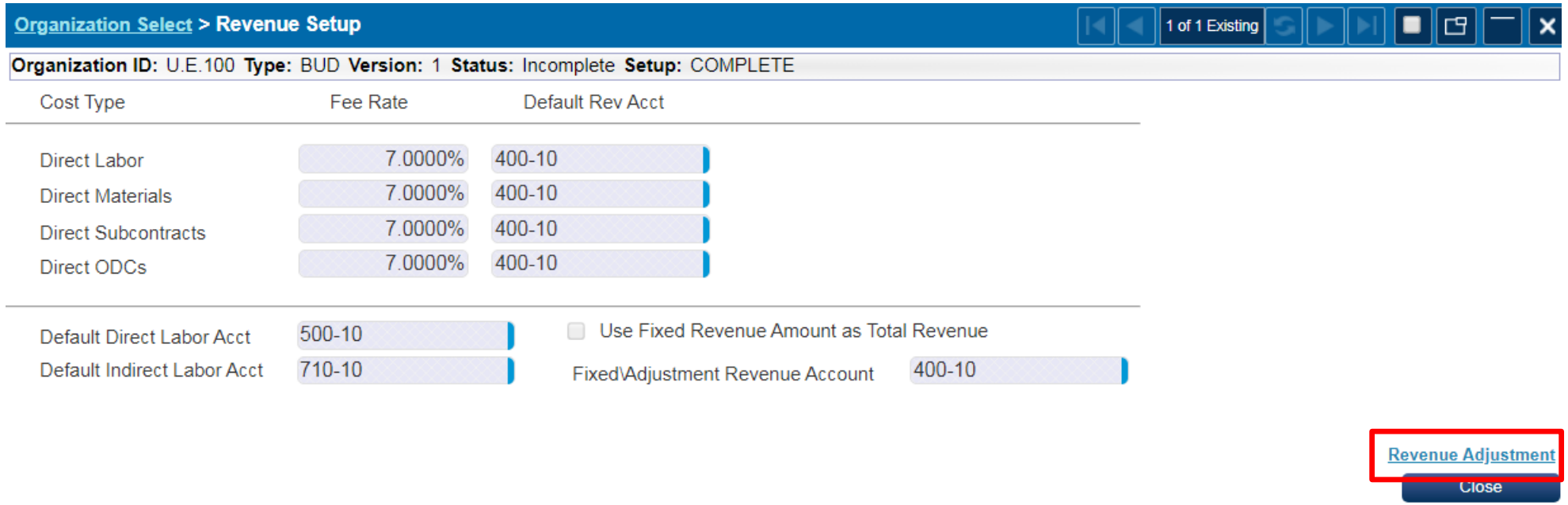
Traditional Method Org Budgeting – Revenue Setup Subtask

- The defaults in the screen can be edited.
- Revenue Adjustments can be added by Fiscal Year and Period in the subtask.



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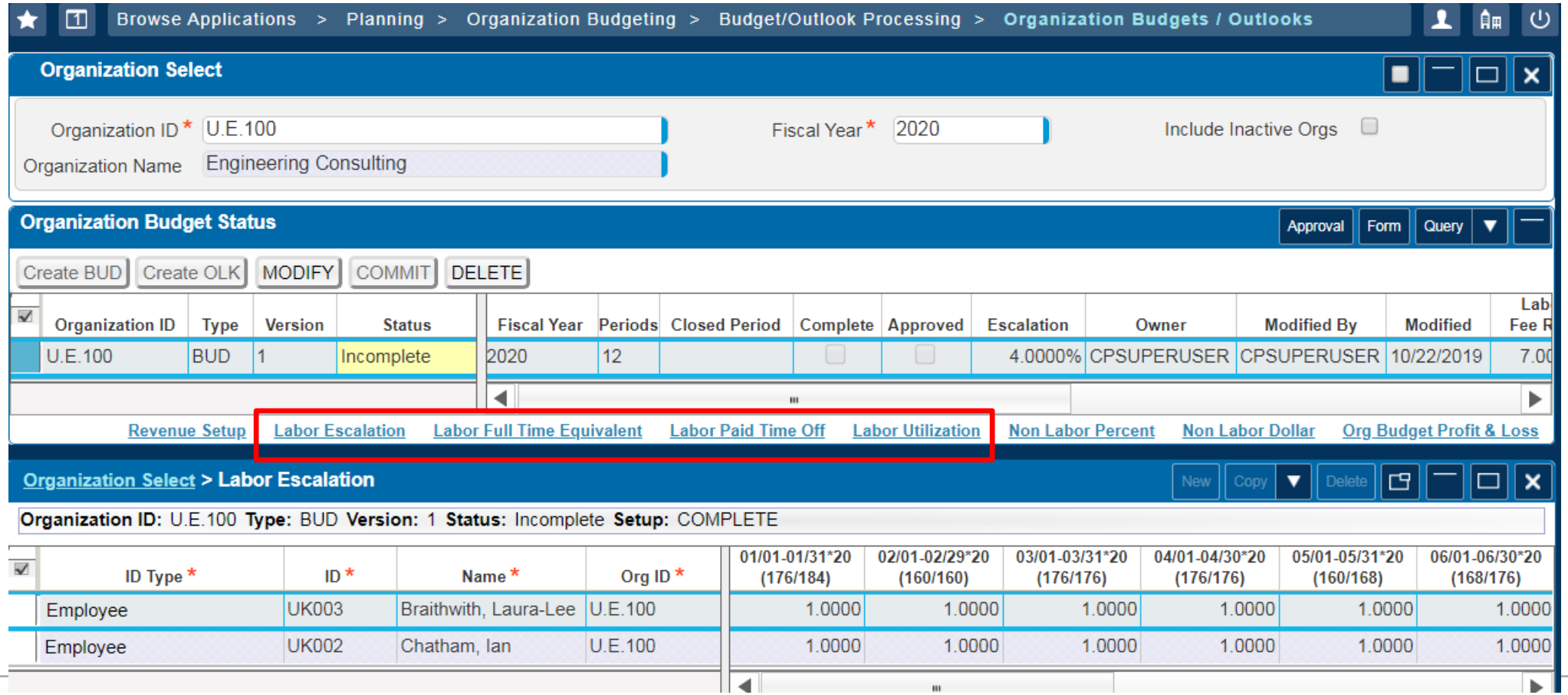
Traditional Method Org Budgeting – Labor Subtasks

- Labor Escalation, Labor FTE, Labor PTO and Labor Utilization subtasks are linked.
- Employees who have the Org as their Home Org populate the Labor subtasks.



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Traditional Method Org Budgeting – Labor Subtasks

- Labor Escalation - The escalation rate is a default setting in the configuration table. You can edit the rate by individual.
- Labor FTE - A factor of 1.0 means that the individual is available for work a standard 2080 hours per year, adjusted for company holidays, distributed by period or sub-period, while a factor of Ø means that person is not available for a given period or sub-period.
- Labor PTO - View and update Labor Paid Time Off records. The system uses the PTO pattern from Budget Cycle Initialization as the default for all the employees.
- Labor Utilization – This screen indicates how much of an employees time is direct labor, the remaining amount is treated as indirect labor.
  - Indirect Utilization Split subtask - allows you to split indirect labor into multiple accts/orgs.
  - Direct Utilization Split subtask - allows you to split direct labor into multiple accts/orgs.
  - The ‘Split’ column in Labor Utilization will indicate if an employee’s time is split.

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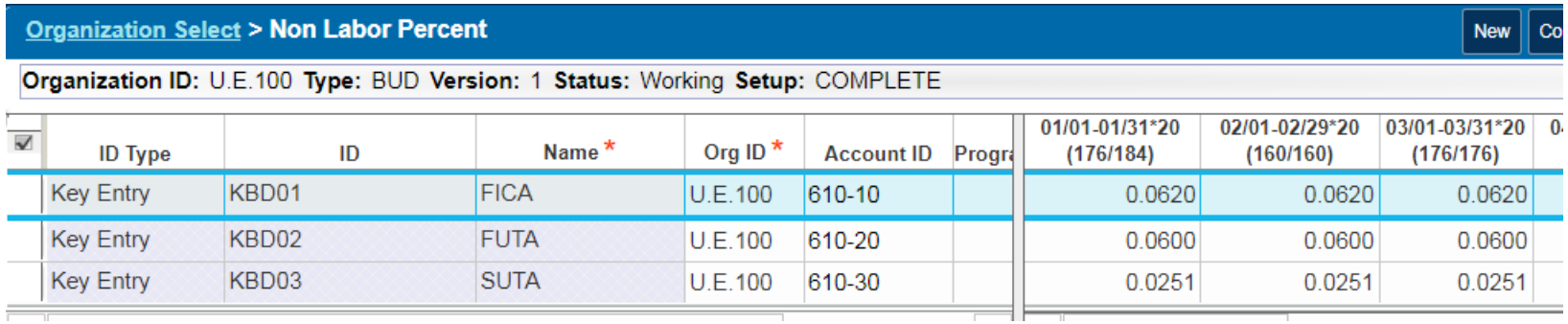
Traditional Method Org Budgeting – Non-Labor Subtasks

» Non-Labor Percent – This subtask completion is the 3rd step in the Non-Labor Percent setup. (See Org Initialization slides). This is where the Percent amount is set for the individual Org Budget.



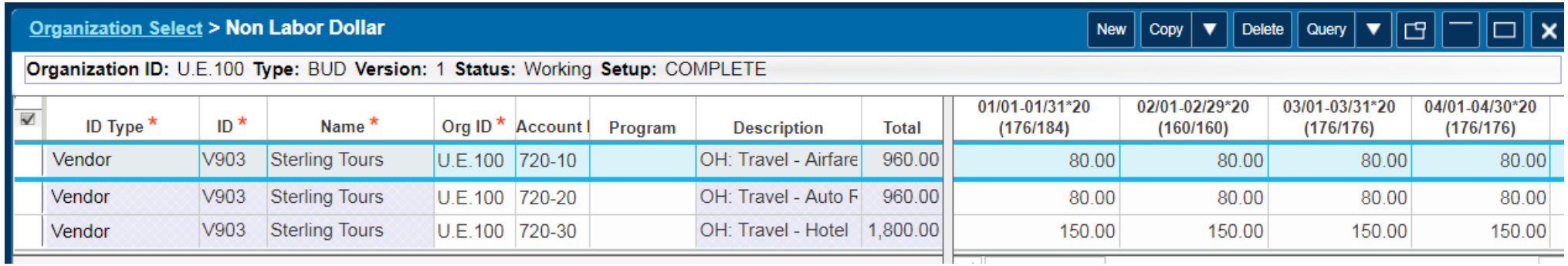
Organization Select > Non Labor Percent

New Co

Organization ID: U.E.100 Type: BUD Version: 1 Status: Working Setup: COMPLETE

ID Type	ID	Name *	Org ID *	Account ID	Progra	01/01-01/31*20 (176/184)	02/01-02/29*20 (160/160)	03/01-03/31*20 (176/176)	0
Key Entry	KBD01	FICA	U.E.100	610-10		0.0620	0.0620	0.0620	
Key Entry	KBD02	FUTA	U.E.100	610-20		0.0600	0.0600	0.0600	
Key Entry	KBD03	SUTA	U.E.100	610-30		0.0251	0.0251	0.0251	

» Non-Labor Dollar – Enter Non-Labor budget costs:



Organization Select > Non Labor Dollar

New Copy Delete Query

Organization ID: U.E.100 Type: BUD Version: 1 Status: Working Setup: COMPLETE

ID Type *	ID *	Name *	Org ID *	Account I	Program	Description	Total	01/01-01/31*20 (176/184)	02/01-02/29*20 (160/160)	03/01-03/31*20 (176/176)	04/01-04/30*20 (176/176)
Vendor	V903	Sterling Tours	U.E.100	720-10		OH: Travel - Airfare	960.00	80.00	80.00	80.00	80.00
Vendor	V903	Sterling Tours	U.E.100	720-20		OH: Travel - Auto F	960.00	80.00	80.00	80.00	80.00
Vendor	V903	Sterling Tours	U.E.100	720-30		OH: Travel - Hotel	1,800.00	150.00	150.00	150.00	150.00

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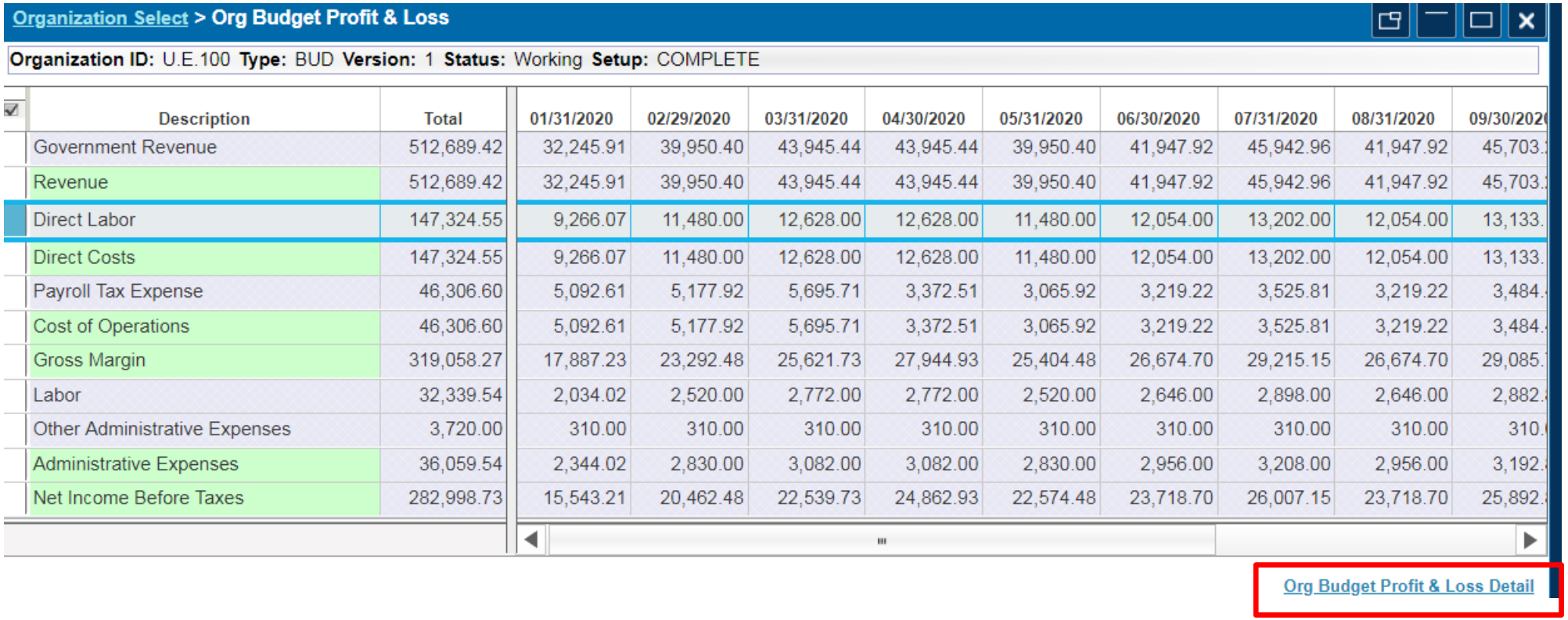
Traditional Method Org Budgeting – Org Budget Profit & Loss

- The Profit & Loss subtask is available even when the budget is in a Working status. The user can review the affects of the budget data entered.
- The report has a subtask to drill down into details.



Organization Select > Org Budget Profit & Loss

Organization ID: U.E.100 **Type:** BUD **Version:** 1 **Status:** Working **Setup:** COMPLETE

Description	Total	01/31/2020	02/29/2020	03/31/2020	04/30/2020	05/31/2020	06/30/2020	07/31/2020	08/31/2020	09/30/202
Government Revenue	512,689.42	32,245.91	39,950.40	43,945.44	43,945.44	39,950.40	41,947.92	45,942.96	41,947.92	45,703.
Revenue	512,689.42	32,245.91	39,950.40	43,945.44	43,945.44	39,950.40	41,947.92	45,942.96	41,947.92	45,703.
Direct Labor	147,324.55	9,266.07	11,480.00	12,628.00	12,628.00	11,480.00	12,054.00	13,202.00	12,054.00	13,133.
Direct Costs	147,324.55	9,266.07	11,480.00	12,628.00	12,628.00	11,480.00	12,054.00	13,202.00	12,054.00	13,133.
Payroll Tax Expense	46,306.60	5,092.61	5,177.92	5,695.71	3,372.51	3,065.92	3,219.22	3,525.81	3,219.22	3,484.
Cost of Operations	46,306.60	5,092.61	5,177.92	5,695.71	3,372.51	3,065.92	3,219.22	3,525.81	3,219.22	3,484.
Gross Margin	319,058.27	17,887.23	23,292.48	25,621.73	27,944.93	25,404.48	26,674.70	29,215.15	26,674.70	29,085.
Labor	32,339.54	2,034.02	2,520.00	2,772.00	2,772.00	2,520.00	2,646.00	2,898.00	2,646.00	2,882.
Other Administrative Expenses	3,720.00	310.00	310.00	310.00	310.00	310.00	310.00	310.00	310.00	310.
Administrative Expenses	36,059.54	2,344.02	2,830.00	3,082.00	3,082.00	2,830.00	2,956.00	3,208.00	2,956.00	3,192.
Net Income Before Taxes	282,998.73	15,543.21	20,462.48	22,539.73	24,862.93	22,574.48	23,718.70	26,007.15	23,718.70	25,892.

Org Budget Profit & Loss Detail

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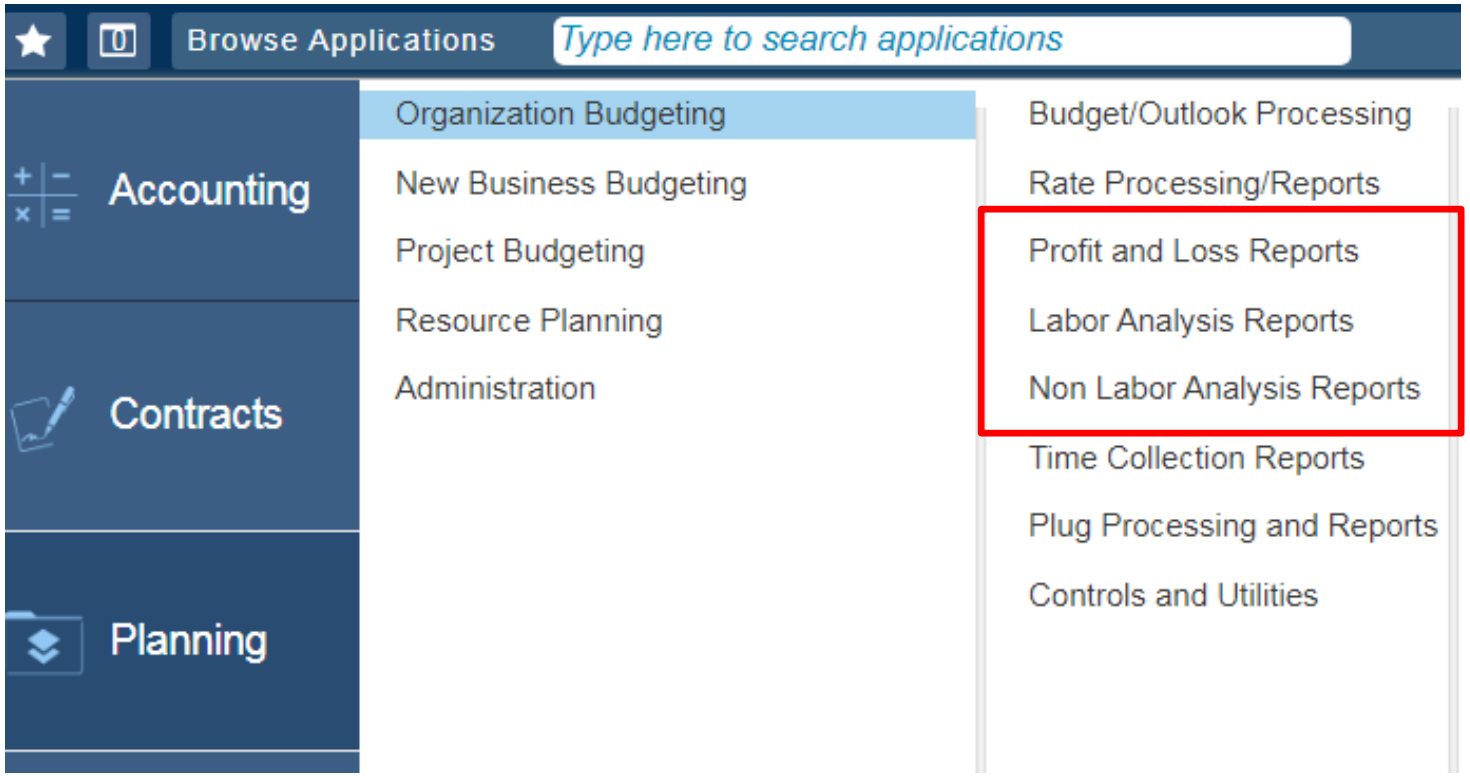
Traditional Method Org Budgeting – Reports

When the Working budget is Committed, the data is available in Org Budget Reports.



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Plug Project Calculation

Traditional Method

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Traditional Method Org Budgeting – Plug Project Processing

- Plug Processing compares Org Budget revenue and costs to the underlying portfolio of Project and New Business Budgets.
- The Plug Project for any organization is simply the difference, for each direct account, between the organization's budget and the sum of all of its backlog and new business budget revenue and cost details associated with the fiscal year.
- The larger the Plug for any direct account, the more risk there is associated with a given organization budget.

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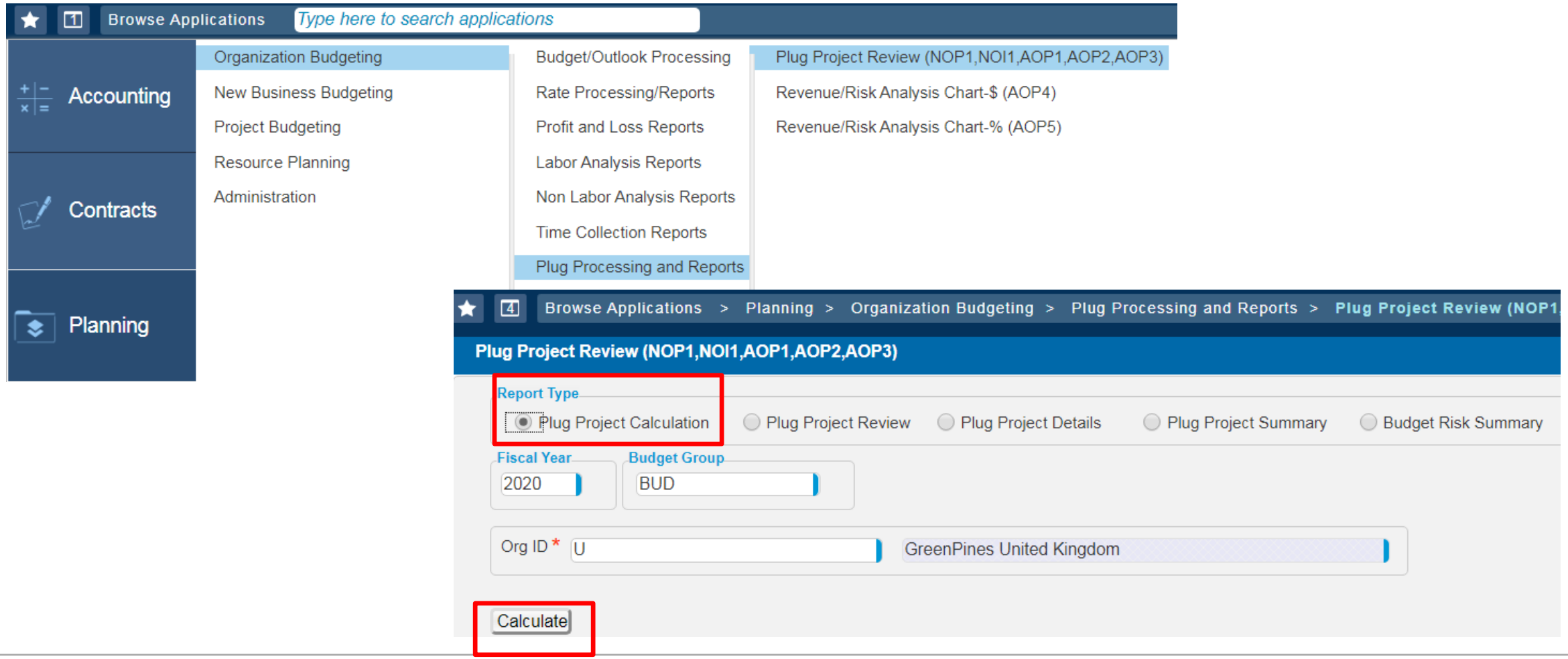
Traditional Method Org Budgeting – Plug Processing Calculation

» By Org or top level Org, calculate the Plug (Risk) amount.



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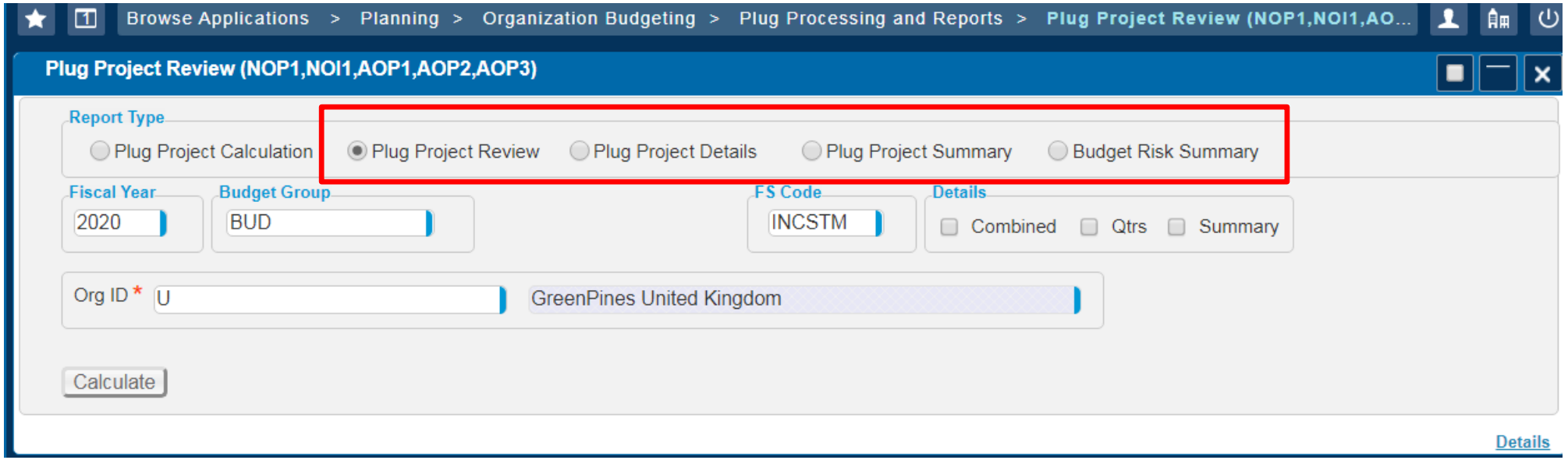
Traditional Method Org Budgeting – Plug Processing Review

- Run the reports in the Plug Project Review screen.
- The higher the % calculated, the higher the risk. Meaning the Project and New Business Budgets are not providing the expected results as setup in the Org Budgets.
- Go to the ‘Detail’ subtask and drill down to find the detailed plug amounts.



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Traditional Method Org Budgeting – Plug Processing Review Example

» Run the reports in the Plug Project Review screen.

Plug Project Review (NOP1,NOI1,AOP1,AOP2,AOP3) > Details

Expand All | Collapse All

Description	YTD	01/31/2020	02/29/2020	03/31/2020
- Government Revenue	741,084.20	46,623.03	55,120.51	60,947.56
- 400-10 Revenue: Services	741,084.20	46,623.03	55,120.51	60,947.56
Org Budget	753,159.20	52,398.03	58,270.51	64,097.56
Project EAC	-12,075.00	-5,775.00	-3,150.00	-3,150.00
Revenue	741,084.20	46,623.03	55,120.51	60,947.56
+ Direct Labor	213,250.46	10,190.47	14,384.00	16,122.40
+ Travel	0.00	0.00	0.00	0.00
Direct Costs	213,250.46	10,190.47	14,384.00	16,122.40

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Traditional Method Org Budgeting – Revenue/Risk Analysis Chart

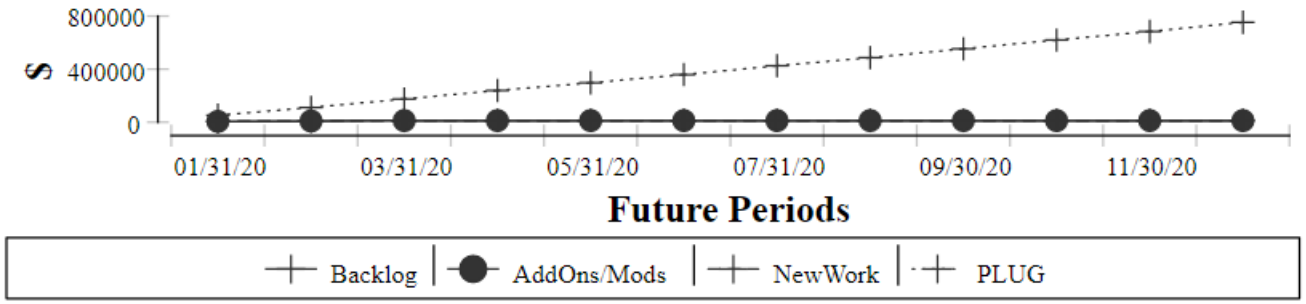
» Two charts are available, this example is the Revenue/Risk Analysis by $: (The other is by %).

Revenue/Risk Analysis Chart-$ (AOP4) - 1

GreenPines United Kingdom

Revenue / Risk Analysis $

Page 1 of 1
10/25/19
12:19 PM



Period Date	Backlog	AddOns/Mods	New Work	PLUG
01/31/20	5,775.00	5,775.00	5,775.00	52,398.03
02/29/20	8,925.00	8,925.00	8,925.00	110,668.54
03/31/20	12,075.00	12,075.00	12,075.00	174,766.10
04/30/20	12,075.00	12,075.00	12,075.00	238,863.66
05/31/20	12,075.00	12,075.00	12,075.00	297,134.17
06/30/20	12,075.00	12,075.00	12,075.00	358,318.21
07/31/20	12,075.00	12,075.00	12,075.00	425,329.30
08/31/20	12,075.00	12,075.00	12,075.00	486,513.34
09/30/20	12,075.00	12,075.00	12,075.00	553,174.81
10/31/20	12,075.00	12,075.00	12,075.00	619,836.28
11/30/20	12,075.00	12,075.00	12,075.00	683,467.68
12/31/20	12,075.00	12,075.00	12,075.00	753,159.20

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Creating an Org Budget

Integrated Method

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Integrated Method Org Budget

- Configuration of either **Project Budget Revenue** or **Project Plus Org Revenue Adjustment**
- This option allows Revenue, Labor and Non-Labor updates to the Org Budgets from the Project and New Business Budgets.
- With an option to allow Revenue Adjustments in the Org Budgets.
- Assumes Total Project Accounting.
- Ability to manually enter Org Budgets is disabled. Except for Non-Labor Percent.

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Integrated Method Org Budget - Background

- Each time the Update Org Non-Labor, Labor or Revenue from Projects is processed, the Org Budget will be overwritten.
- Labor entered as Hours in the Project Budget is shown as %Utilization in the Org Budgets.
- The Project Budget data will be from the latest committed Budget or EAC. The user can choose a 'minimum status' of the project budget to be 'Complete' or 'Approved'.
- The Org Budgets with a status of 'Working', 'Incomplete' and 'Complete' will be updated. Approved Org Budgets will not be updated and a message in the Update result set screen will be 'Org Budget – Missing'.
- There will be no 'Plugs' when Project Budget Revenue is used.
- The configuration choice should not be changed 'on the fly', the Admin would need to run processes and the Org Budgets would have to be recommitted.

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Integrated Method Org Budget - Background Contd.

- The ‘Default Revenue Posting’ setting in Projects>Project Setup>Project Setup Controls>Configure Project Settings will be used in Planning when updating Labor, Non-Labor and Revenue from the Project Budgets to Org Budgets. The setting is either:
  - ‘Owning Org’ – meaning the Home Org of an Employee and Owning Org of the Project for Non-Labor and Revenue.
  - ‘Performing Org’ – in Planning called the ‘P&L’ or ‘Pool’ Org. This is the Org used when the Labor and Non-Labor are entered into the budget and the Revenue follows those Orgs.
- The user is able to run Planning reports by either ‘Owning’ or ‘Performing’ Org. Our system is set to ‘Owning Org’.
- Currently New Business Budgets with a ‘work type’ of ‘Proposal’ will not be included in the Uploads.

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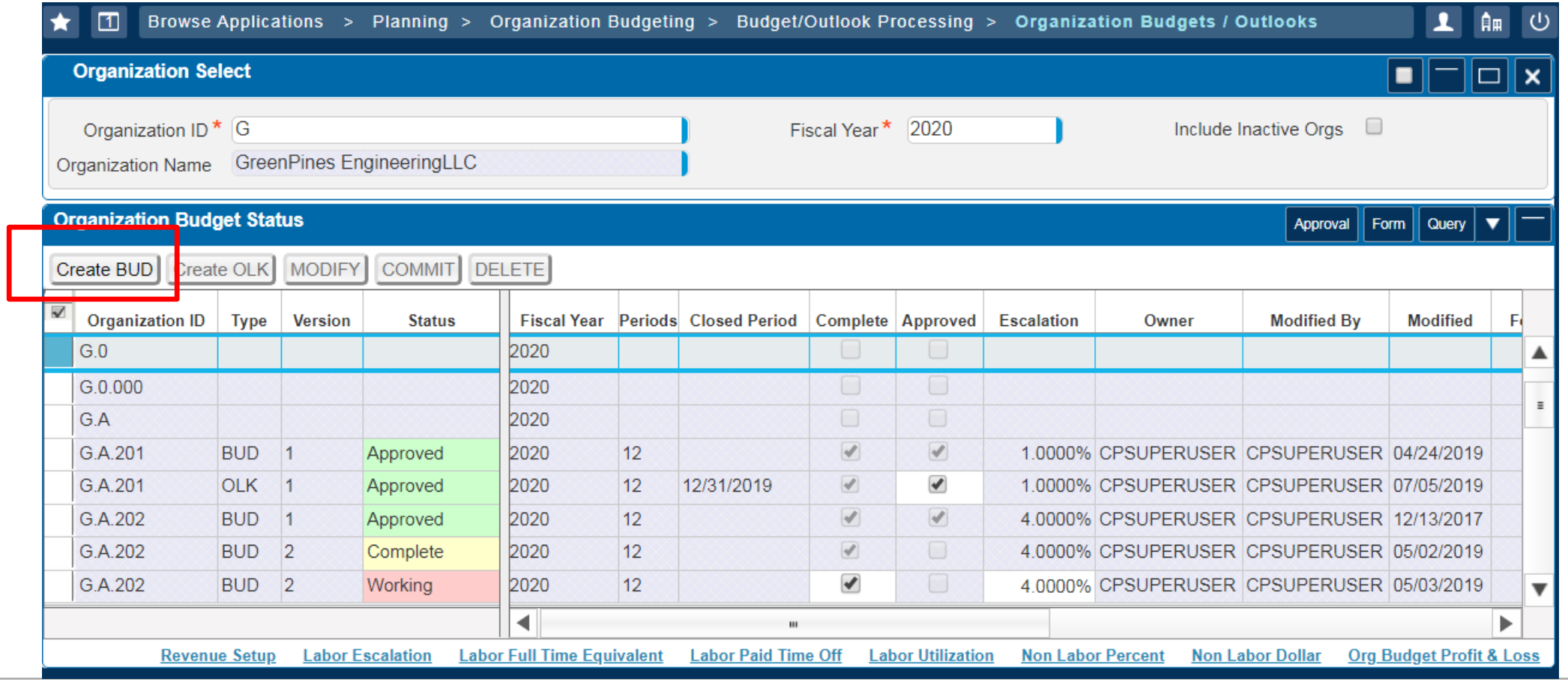
Integrated Method Org Budgeting – Create Budget

» An Org Budget must exist before you upload the Project Budget data to the Org Budgets. Chose the level to be budgeted and click ‘Create Bud’.



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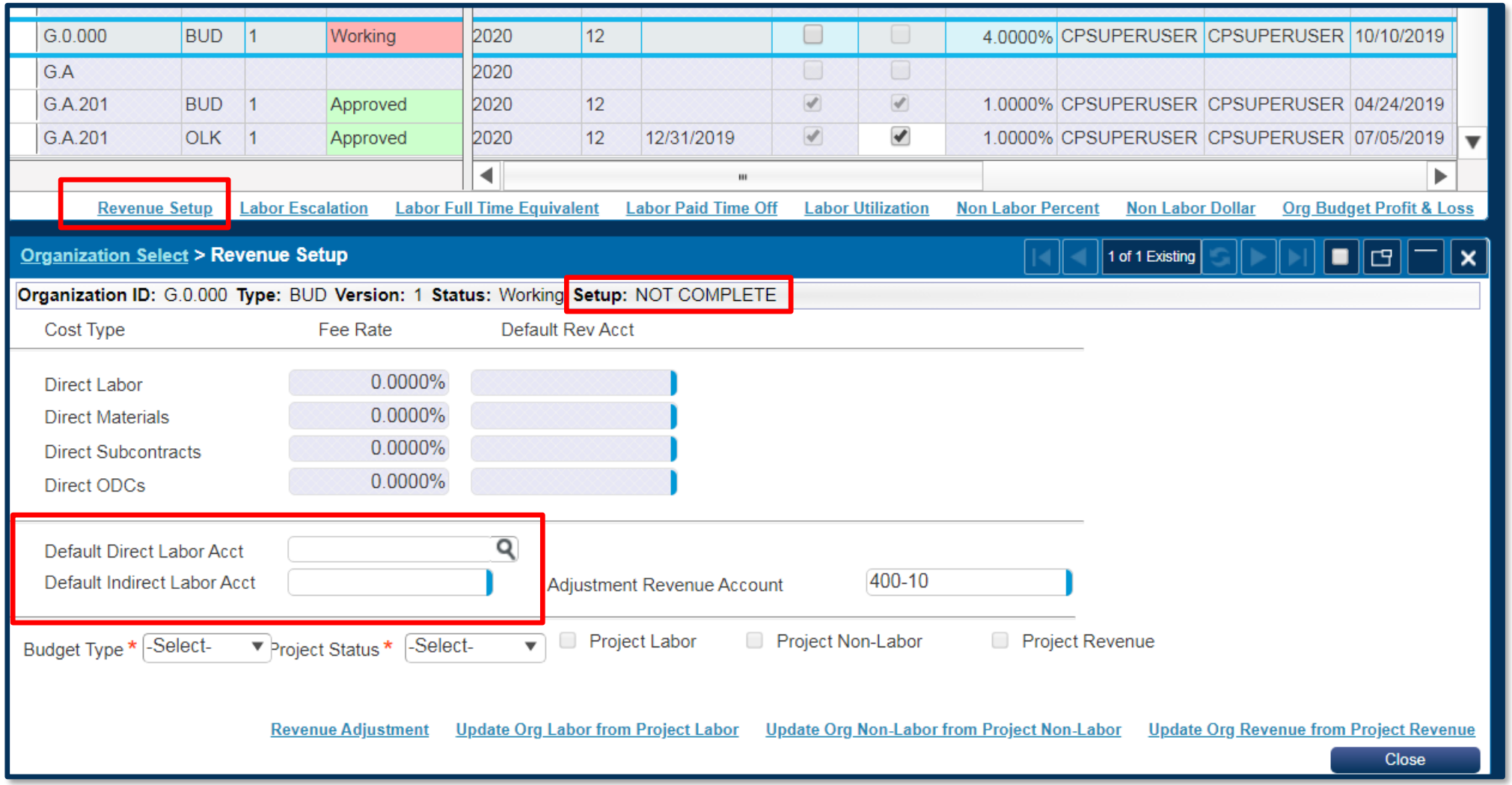
Integrated Method Org Budgeting – Revenue Setup Subtask

- Your Org Budget will be in a 'Working' status and ready for updating.
- In Revenue Setup add the Default Accounts.
- Setup: NOT COMPLETE until Updates are finished and saved.



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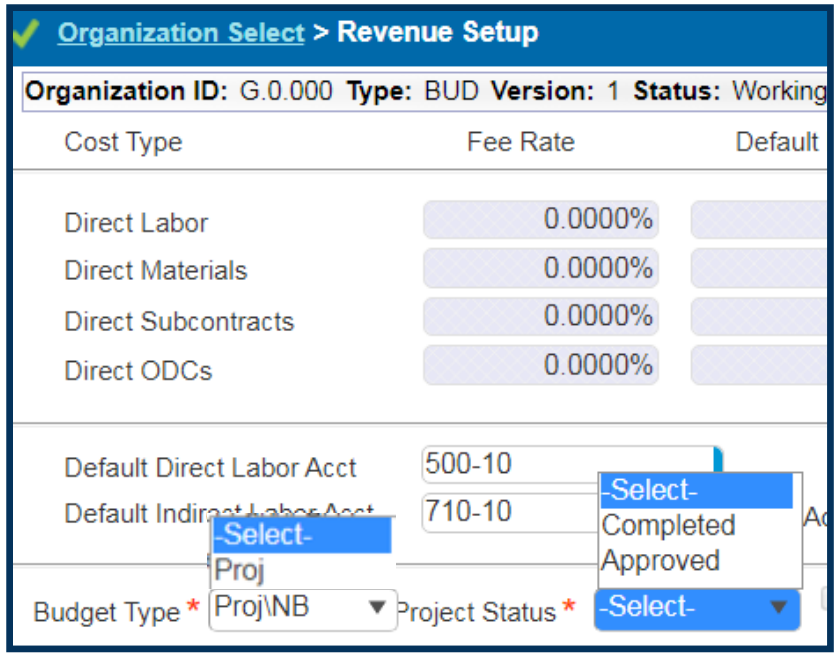
Integrated Method Org Budgeting – Revenue Setup Contd.

- Select ‘Budget Types’ to be used, Project or Project & New Business.
- Note that NBB’s with a ‘Work Type’ of ‘Proposal’ will not be included.



- Select the minimum ‘Project Status’ of budgets to be used ‘Completed’ or ‘Approved’

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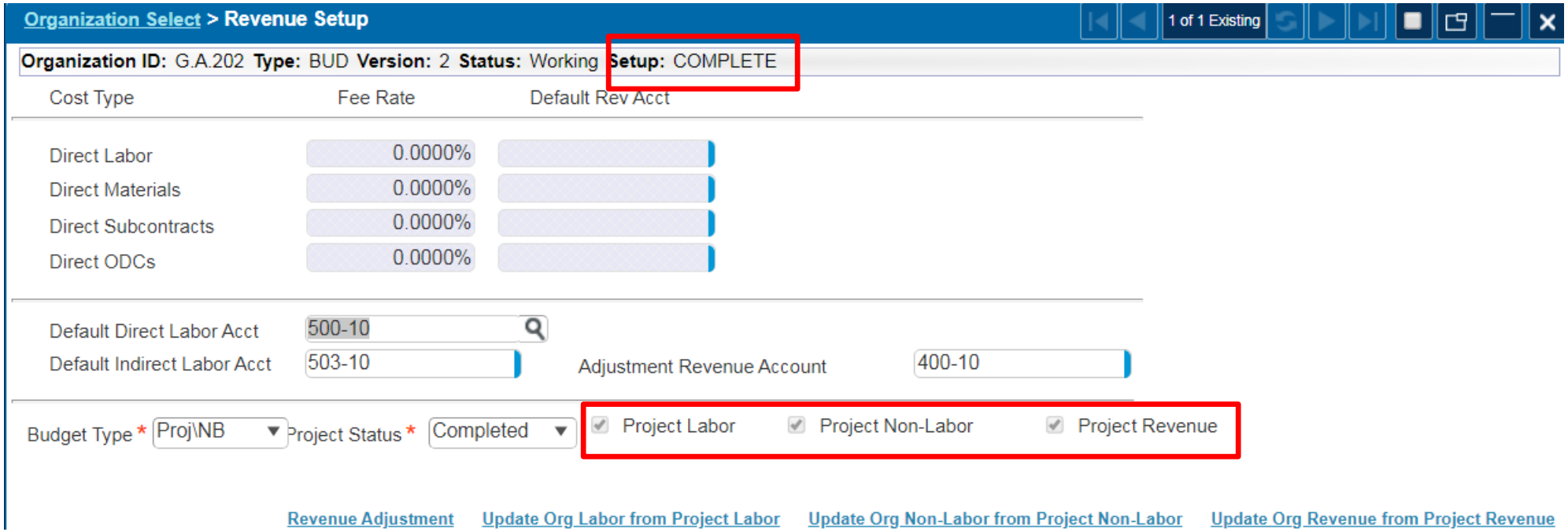
Integrated Method Org Budgeting – Update Org Budgets

- You cannot update Revenue without first updating Labor and Non-Labor.
- Update ‘Project Labor’, ‘Project Non-Labor’ then ‘Project Revenue’
- When finished the Setup = ‘Complete’ and all checkboxes are checked by the system.



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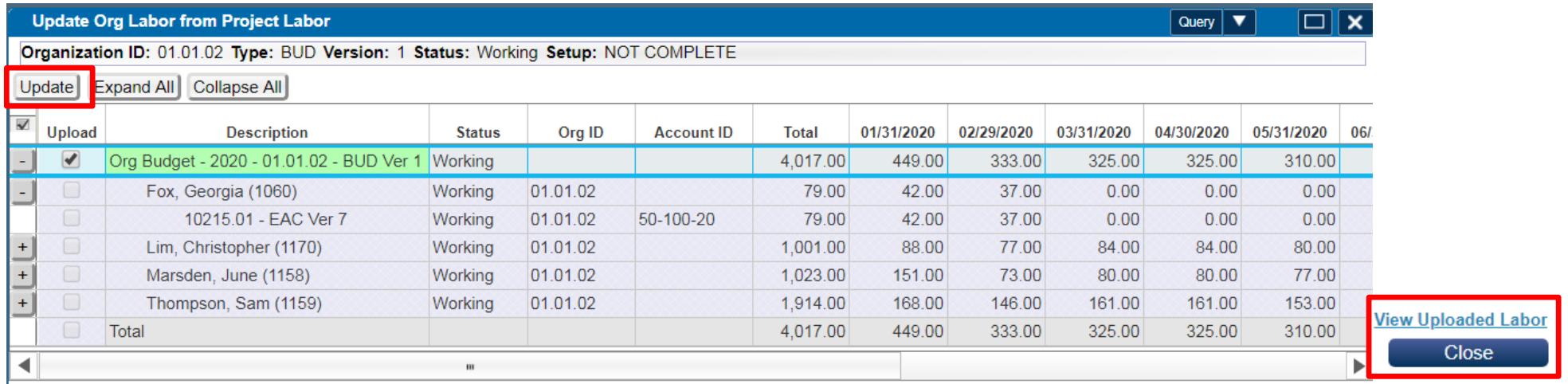
Integrated Method Org Budgeting – Update Org Budgets

- In each ‘Update’ screen, you can drill down to find details of what is going to be updated.
- After an Update, you can go back to these screens and in the ‘View Uploaded Labor’ etc. subtasks, you will see details of the last upload.
- Even if there is no data to come from Projects for Labor or Non-Labor, click update to enable the system check and enable Update Revenue.



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Integrated Method Org Budgeting – Mass Update Utility

- Instead of using the individual Org Budgets, this utility allows you to Upload and Update multiple Org Budgets at one time.
- Also, in the Traditional Method budgets, it is possible to mass update Labor and Non-Labor from the Project Budgets. You cannot update Revenue, that is calculated in the Org Budgets.

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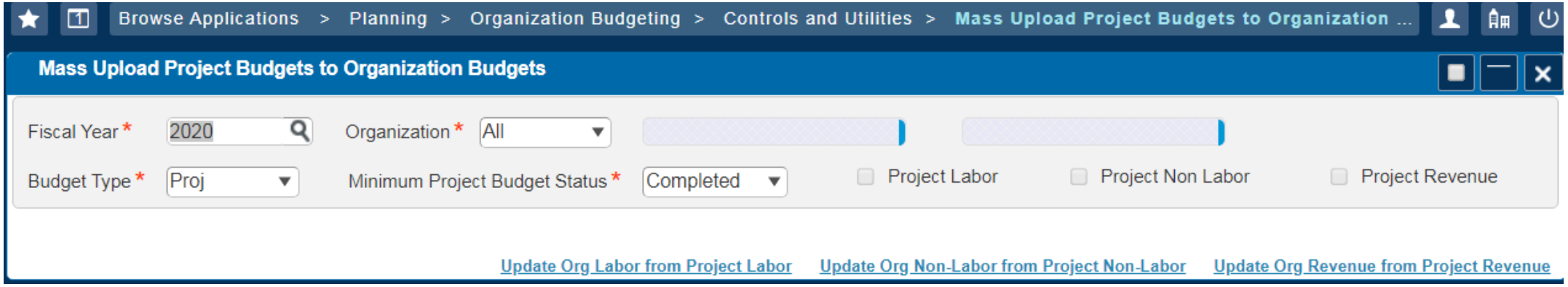
Integrated Method Org Budgeting – Mass Update Utility

- This screen is similar to the one in individual Org Budgets.
- In the Organization dropdown you can choose ‘All’, ‘One’ or ‘Range’.
- This utility can be used with a Traditional Org budget configuration for uploading Labor and Non-Labor only.



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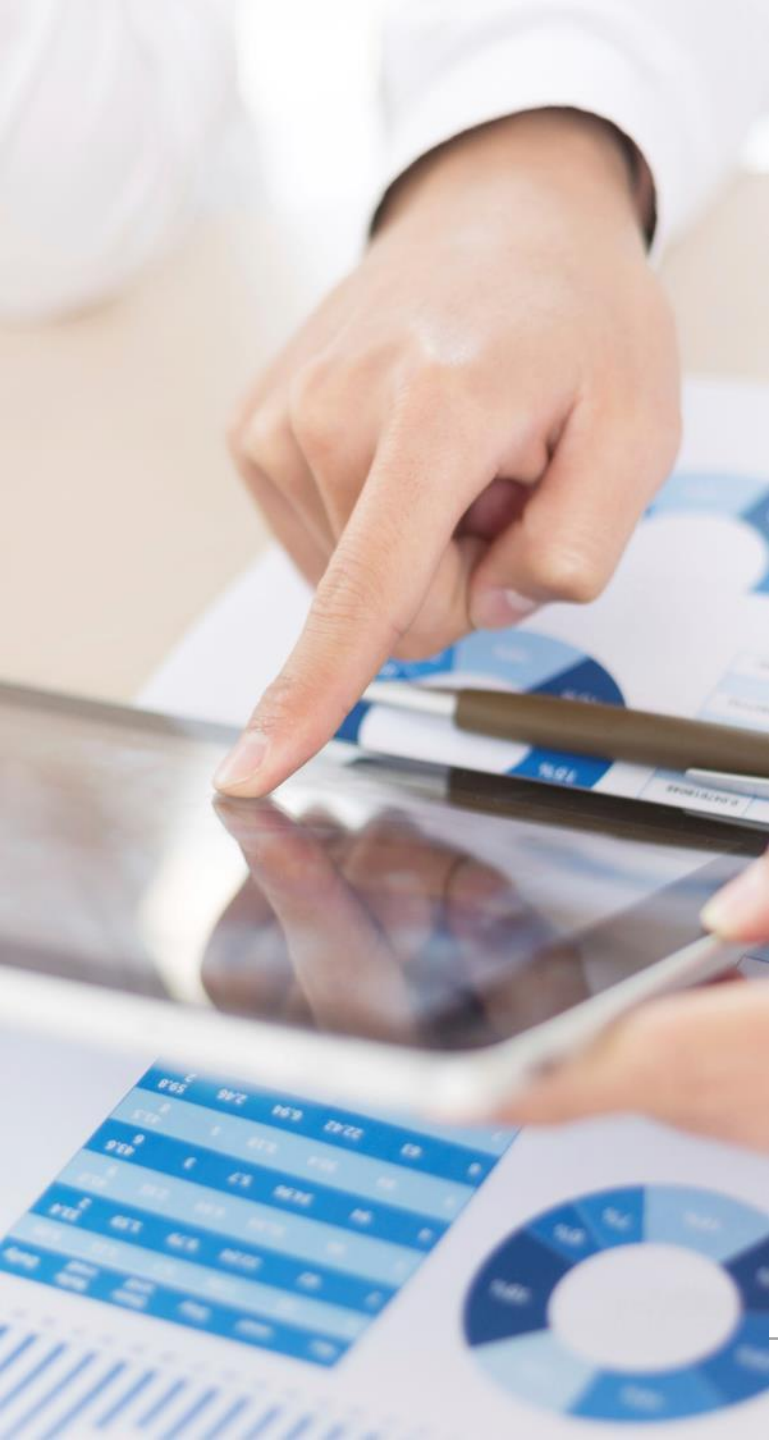

RECAP
Today we have covered:

- Introductions.
- Navigation of Costpoint Planning.
- What is an Organizational Budget?
- Important Configuration Choices and What They Mean.
- Initialize the Org Budget Cycle.
- Creating an Org Budget from Scratch:
  - Traditional Method.
    - Plug Project Processing.
  - Integrated Method.

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Q&A

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Insight 2019	Planning Sessions		
Wednesday Nov 20th 10.00-11.00am	Emerald 6	CP11 – What You May Not Know About CP Planning and Should	Mike Eaton Lynda Porter
Wednesday Nov 20th 11.10-12.10pm	Osceola 5-6	CP14 – A Deep Dive into Org Budgeting for Advanced Users	Lynda Porter Mike Eaton
Wednesday Nov 20th 2.10-3.10pm	Tampa 1-2	CP15 – Project Manager Reporting with Costpoint	Justin Sommer
Wednesday Nov 20th 4.30-5.30pm	Naples 1-2	CP10 – Successful Planning Implementation Starts Here: What You Need to Know	Kyle Evans, Guild Assocs Inc Lynda Porter
Thursday Nov 21 9.40-10.40am	Tampa 3	CP16 – HR and Resource Managers: Get the Most out of CP Planning	Justin Sommer

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