



Deltek INSIGHT > 2019

CP-13:

Getting Started With Organizational Budgeting

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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!





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



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.

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.

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



Navigation

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

The screenshot shows the navigation interface of the Deltek Costpoint application. At the top, there is a search bar labeled "Browse Applications" with the placeholder text "Type here to search applications". Below this is a vertical sidebar menu with the following categories: Accounting, Contracts, Planning, Projects, Materials, People, Reports & Analytics, and Admin. The "Planning" category is currently selected, and its sub-modules are displayed in a grid:

Organization Budgeting	Budget/Outlook Processing	Organization Budgets / Outlooks
New Business Budgeting	Rate Processing/Reports	Organization Budget Cycle Initialization (AOM3)
Project Budgeting	Profit and Loss Reports	Audit Budget Group Details (AOM4)
Resource Planning	Labor Analysis Reports	Create Top Level Outlook (AOM5)
Administration	Non Labor Analysis Reports	
	Time Collection Reports	
	Plug Processing and Reports	
	Controls and Utilities	

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What is an Organizational Budget?



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.

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



Org Budget - Configuration Settings

The screenshot displays the 'Configuration Settings (MAM10)' application window. The breadcrumb navigation path is 'Browse Applications > Planning > Administration > Administration Controls > Configuration Settings (MAM10)'. The 'Organization' tab is selected and highlighted. The settings are as follows:

Setting Name	Value	Options
Paid Time Off Account *	10001-001	<input checked="" type="checkbox"/> Update Employee Home Org
Holiday Account *	00111-010	<input checked="" type="checkbox"/> Update Employee Accrual Rate
PTO Calculation Method *	Percent	
Default PTO Accrual Rate *	10.123456	
Part-Time Holiday Calculation % *	0.5000	
Default Fee Rate *	0.0700	
Default Utilization % *	0.8200	
Labor Expense Org Level(s) *	3	
Non-Labor Expense Org Level(s) *	3	
Project Level Display *	3	
Org Budget Revenue Calculation *	Project Plus Org Revenue Adjustment	
NLABS History Method *	Populate GL Vendor History	

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.

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.

Organization Configuration Settings – What do they mean?

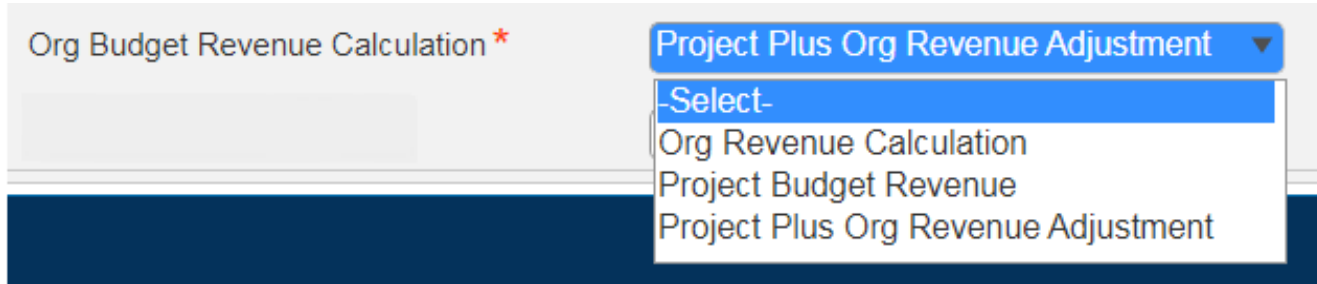
- » **Project Level Display:** The values entered in this field represent the Org levels that will display in Lookup lists for **Project Budgeting**.
- » **Non Labor Dollar History Method:** The value selected here is used when creating the first Org budget. Choose from the following options:
 - » A. 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.

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.)

Organization Configuration Settings – What do they mean?

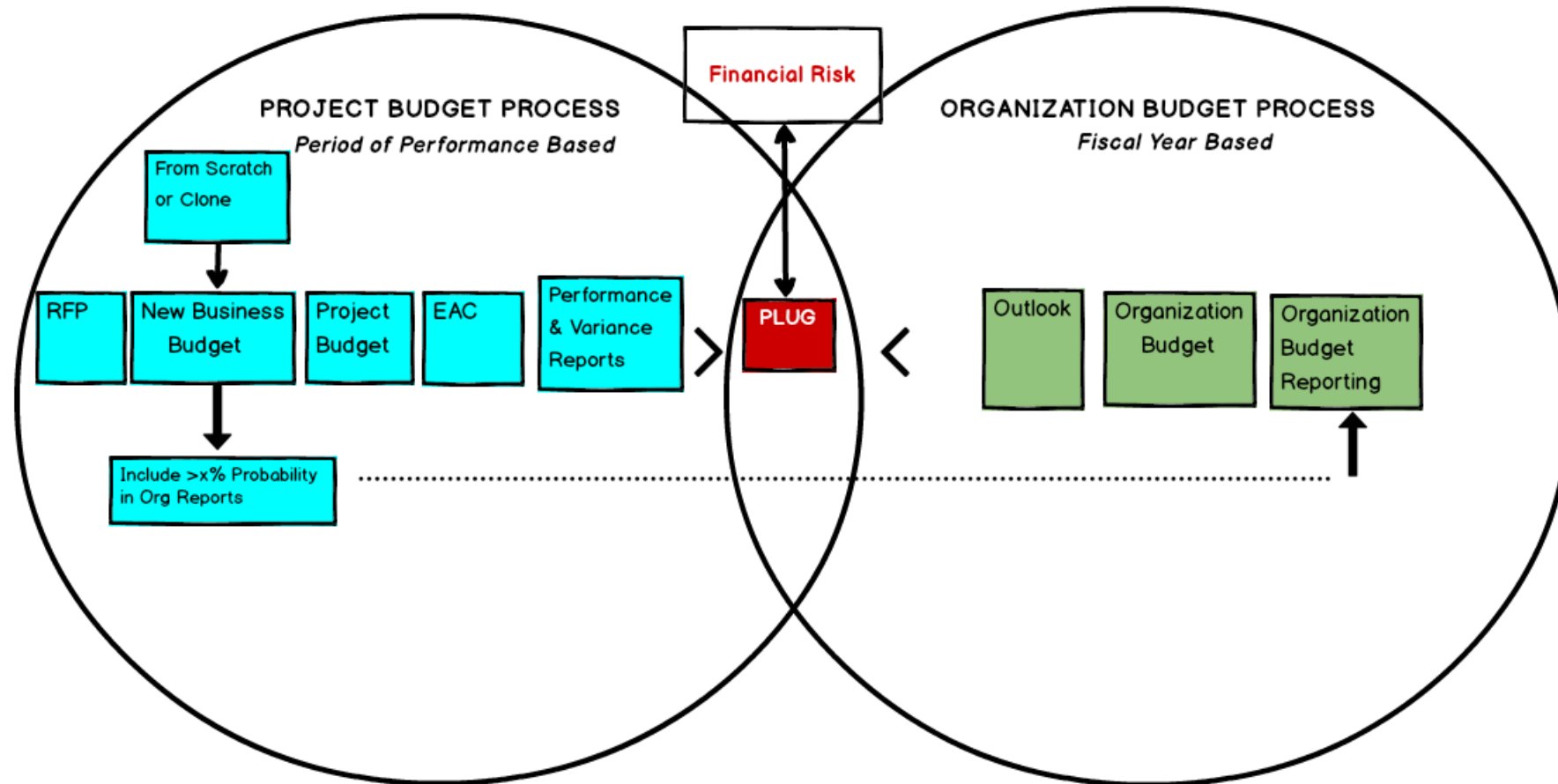


Org Budget Revenue Calculation: A fundamental decision is required ideally before starting the Post Installation Processes, regarding the Org Budget. The setting is by CP Company, not Database wide.

- » **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.

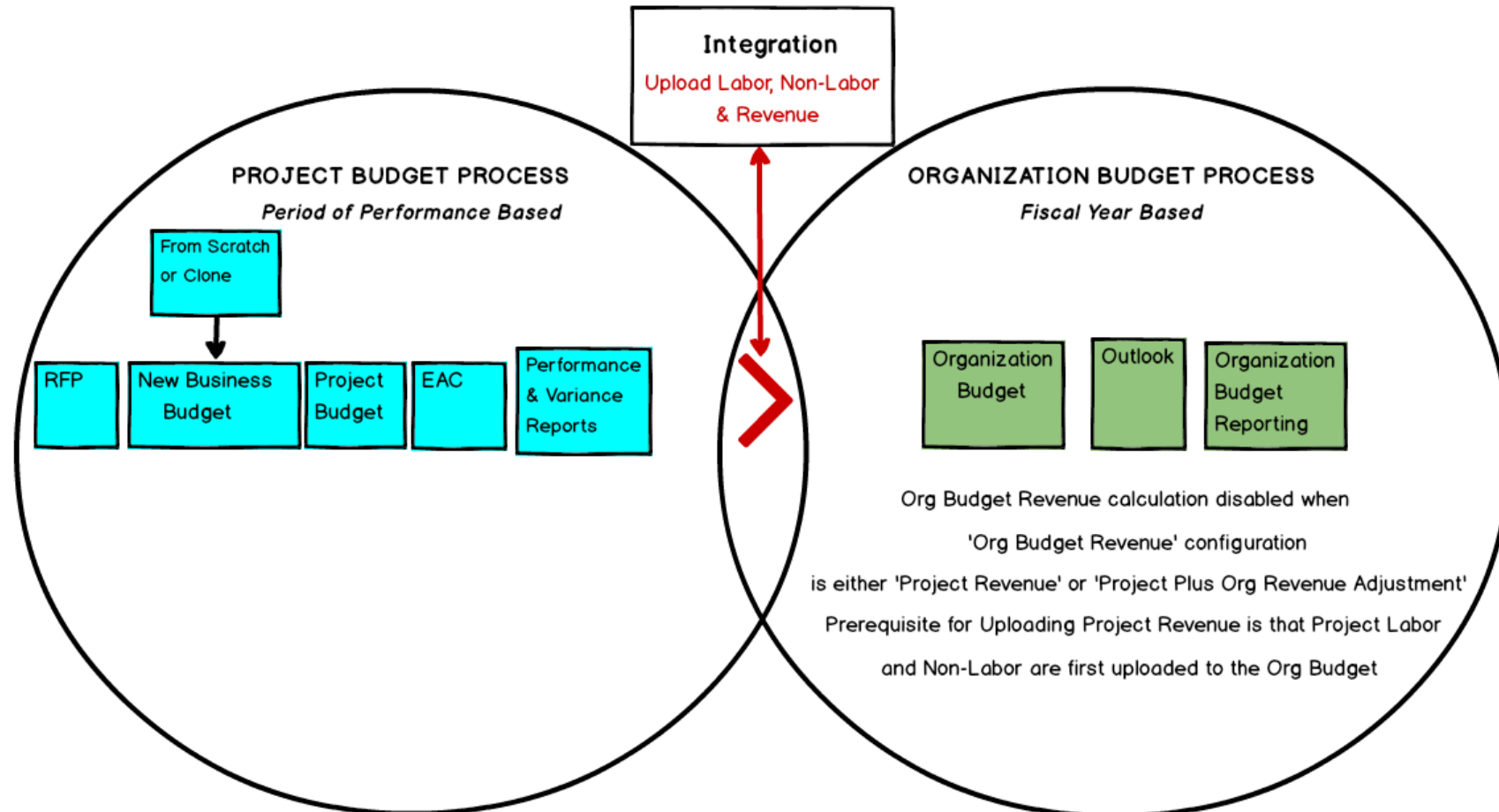
Organization Configuration Settings – What do they mean?

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



Organization Configuration Settings – What do they mean?

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



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Initialize the Org Budget Cycle



Organization Budget Cycle Initialization - Navigation

The screenshot displays the Deltek application navigation interface. At the top, there is a search bar labeled "Browse Applications" with the placeholder text "Type here to search applications". Below the search bar, the navigation menu is organized into three main categories: Accounting, Contracts, and Planning. The Accounting category is expanded, showing a list of sub-items. The "Organization Budgeting" sub-item is further expanded, revealing a list of options including "Budget/Outlook Processing", "New Business Budgeting", "Project Budgeting", "Resource Planning", and "Administration". The "Budget/Outlook Processing" sub-item is also expanded, showing a list of reports and processing options. The "Organization Budget Cycle Initialization (AOM3)" option is highlighted in blue, indicating it is the selected application.

Category	Sub-Category	Item
Accounting	Organization Budgeting	Organization Budgeting
		New Business Budgeting
		Project Budgeting
		Resource Planning
		Administration
Budget/Outlook Processing	Budget/Outlook Processing	Budget/Outlook Processing
		Rate Processing/Reports
		Profit and Loss Reports
		Labor Analysis Reports
		Non Labor Analysis Reports
		Time Collection Reports
		Plug Processing and Reports
		Controls and Utilities
		Organization Budgets / Outlooks
		Organization Budget Cycle Initialization (AOM3)
Audit Budget Group Details (AOM4)		
Create Top Level Outlook (AOM5)		

Organization Budget Cycle Initialization

Browse Applications > Planning > Organization Budgeting > Budget/Outlook Processing > Organization Budget Cycle Initializ...

Organization Budget Cycle Initialization Header

Source Year* 2020 Target Year* 2021

Organization Budget Cycle Initialization

Source Year 2020 Target Year 2021

Clone Holiday Schedule	Complete	Optional	Holiday Schedule	Legend : Required ■ Optional ■ Complete ■
Clone PTO Pattern	Complete	Required	PTO Pattern	
Clone Pool Specs	Complete	Required	Pool Specs	
Freeze Employee Specs		Required	Employee Specs	
Clone NL Percent Specs	Complete	Optional	NLab % Specs	

- » 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.

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.

Organization Budget Cycle Initialization Header > Holidays		
Target Year: 2021		
<input checked="" type="checkbox"/>	Holiday *	Description
	01/01/2021	New Year
	01/18/2021	Martin Luther King Day
	02/15/2021	Presidents' Day
	05/31/2021	Memorial Day
	07/04/2021	Independence Day
	07/05/2021	Independence Day (Observed)
	09/06/2021	Labor Day
	10/11/2021	Columbus Day
	11/11/2021	Vetrans Day
	11/25/2021	Thanksgiving Day
	12/24/2021	Christmas Day (Observed)
	12/25/2021	Christmas Day
	12/31/2021	New Year's Day (Observed)

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.

Organization Budget Cycle Initialization Header > PTO Pattern											
Target Year: 2021											
<input checked="" type="checkbox"/>	Fiscal Year	Total	04/01-04/30*21 (176/176)	05/01-05/31*21 (160/168)	06/01-06/30*21 (176/176)	07/01-07/31*21 (160/176)	08/01-08/31*21 (176/176)	09/01-09/30*21 (168/176)	10/01-10/31*21 (160/168)	11/01-11/30*21 (160/176)	12/01-12/31*21 (160/184)
	2021	100.0000	1.0000	5.0000	10.0000	20.0000	20.0000	19.0000	1.0000	10.0000	10.0000

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

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

Fiscal Year	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			<input type="checkbox"/>
2021	15	1	500-10	G.E.100	ALL-DA-1D	G.E.100	POL-CR-10	G.0.000			<input type="checkbox"/>
2021	15	1	500-10	G.E.102	ALL-DA-1D	G.E.102	POL-CR-10	G.0.000			<input type="checkbox"/>

Organization Budget Cycle Initialization Header > Pool Cost Acct

Fiscal Year	Pool Number *	Alloc Group *	Organization *	Account *	Locked
2021	15	1	G.A.201	610-10	<input type="checkbox"/>
2021	15	1	G.A.202	610-10	<input type="checkbox"/>
2021	15	1	G.C.FIN	610-10	<input type="checkbox"/>
2021	15	1	G.C.HDQ	610-10	<input type="checkbox"/>
2021	15	1	G.C.HUM	610-10	<input type="checkbox"/>
2021	15	1	G.C.MAR	610-10	<input type="checkbox"/>

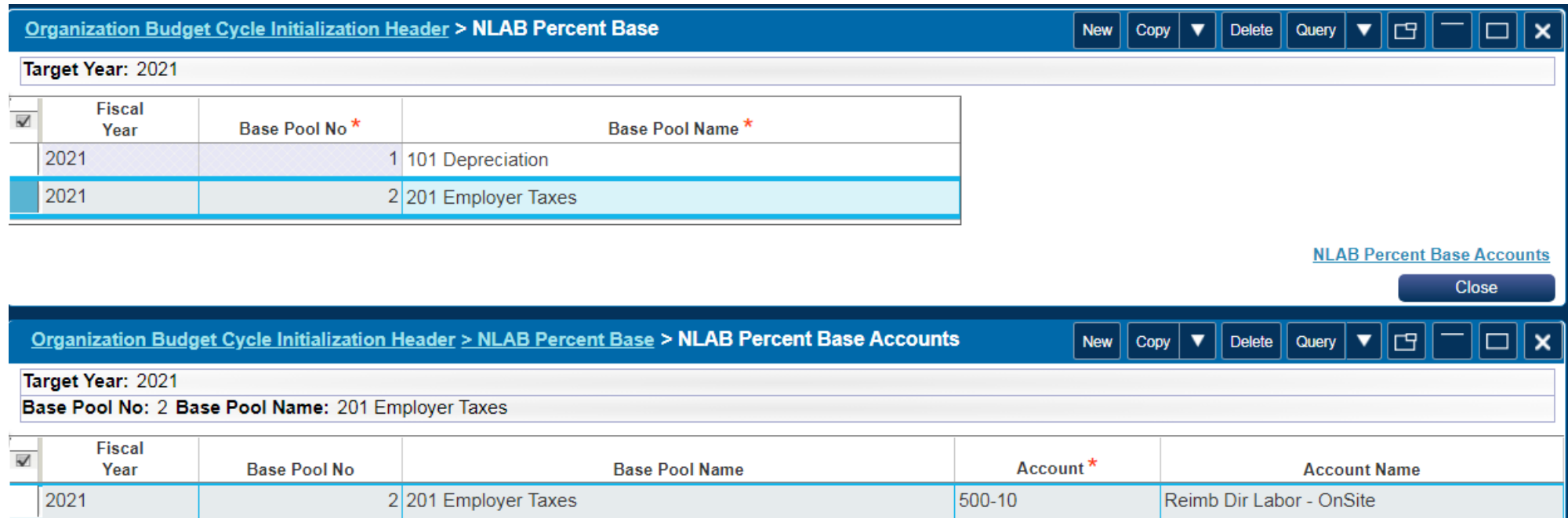
Organization Budget Cycle Initialization – Employee Rates

- » **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													
Target Year: 2021													
<input checked="" type="checkbox"/>	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	<input type="checkbox"/>
	2021	GP018	Vu, Wei	ACT		G.E.102				0	23.2300	13.2778	<input type="checkbox"/>
	2021	UK001	Weatherhill, Tristan	ACT		U.E.200				0	45.0000	0.0000	<input type="checkbox"/>
	2021	GP019	Whitefeather, Wheatley	ACT		G.C.HDQ				0	22.0000	13.2778	<input type="checkbox"/>
	2021	1010	Williams, Ted	ACT		1.1.01.1111				0	30.0000	0.0000	<input type="checkbox"/>
	2021	10050	Zacchaeues, Steven	ACT		1.1.02.1211				0	26.0000	0.0000	<input type="checkbox"/>
	2021	10051	Zacchaeus, Robert	IN	12/31/2001	1.2.01.2120				0	26.0000	0.0000	<input type="checkbox"/>
	2021	10045	Zachary, Joan	IN	12/31/2001	3.001.3110				0	12.9337	19.9616	<input type="checkbox"/>
	2021	10027	Zachary, Joseph	IN	12/31/2001	3.001.3110				0	14.4231	19.9616	<input type="checkbox"/>
	2021	10052	Zachary, Timothy	IN	12/31/2001	1.2.01.2120				0	18.0000	0.0000	<input type="checkbox"/>
	2021	10018	Zales, Joseph	ACT		1.1.02.1240				0	10.5000	19.9616	<input type="checkbox"/>
	2021	10042	Zalinski, Alan	IN	12/31/2001	3.001.3110				0	23.5209	9.9908	<input type="checkbox"/>

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.



The screenshot displays two screenshots of a software interface for setting up NLAB Percent Base Accounts. The top screenshot shows the 'NLAB Percent Base' configuration screen for the target year 2021. It features a table with columns for Fiscal Year, Base Pool No, and Base Pool Name. Two entries are listed: '1 101 Depreciation' and '2 201 Employer Taxes'. The second entry is highlighted. Below the table is a link for 'NLAB Percent Base Accounts' and a 'Close' button. The bottom screenshot shows the 'NLAB Percent Base Accounts' configuration screen for the target year 2021. It displays the selected 'Base Pool No: 2' and 'Base Pool Name: 201 Employer Taxes'. Below this, a table lists the account details for the selected base pool, with columns for Fiscal Year, Base Pool No, Base Pool Name, Account, and Account Name. The entry shows '201 Employer Taxes' with account '500-10' and name 'Reimb Dir Labor - OnSite'.

Organization Budget Cycle Initialization Header > NLAB Percent Base

Target Year: 2021

<input checked="" type="checkbox"/>	Fiscal Year	Base Pool No *	Base Pool Name *
	2021	1	101 Depreciation
	2021	2	201 Employer Taxes

[NLAB Percent Base Accounts](#)

Close

Organization Budget Cycle Initialization Header > NLAB Percent Base > NLAB Percent Base Accounts

Target Year: 2021

Base Pool No: 2 Base Pool Name: 201 Employer Taxes

<input checked="" type="checkbox"/>	Fiscal Year	Base Pool No	Base Pool Name	Account *	Account Name
	2021	2	201 Employer Taxes	500-10	Reimb Dir Labor - OnSite

Organization Budget Cycle Initialization – NLAB Percent Contd.

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

<input checked="" type="checkbox"/>	Fiscal Year	Account ID *	Account Name	Org ID *	Base Pool No *	Active	Company Wide	Pre Populate
	2021	610-10	FICA Expense	G	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	2021	750-10	OH: Depreciation	G	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- » **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.

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.

Browse Applications > Planning > Organization Budgeting > Budget/Outlook Processing > Organization Budgets / Outlooks

Organization Select

Organization ID * G.A.202 Fiscal Year * 2020 Include Inactive Orgs

Organization Name Architecture Marketing

Organization Budget Status Approval Form Query

Create BUD Create OLK MODIFY COMMIT DELETE

Organization ID	Type	Version	Status	Fiscal Year	Periods	Closed Period	Complete	Approved	Escalation	Owner	Modified By	Modified	Lab Fee R
G.A.202	BUD	1	Approved	2020	12		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	12/13/2017	
G.A.202	BUD	2	Complete	2020	12		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	05/02/2019	
G.A.202	BUD	2	Working	2020	12		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	05/03/2019	
G.A.202	OLK	1	Approved	2020	12	01/31/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	05/02/2019	

Revenue Setup Labor Escalation Labor Full Time Equivalent Labor Paid Time Off Labor Utilization Non Labor Percent Non Labor Dollar Org Budget Profit & Loss

Organization Select > Non Labor Percent New Copy Delete

Organization ID: G.A.202 Type: BUD Version: 2 Status: Working Setup: COMPLETE

ID Type	ID	Name *	Org ID *	Account ID	Program	01/01-01/31*20 (176/184)	02/01-02/29*20 (160/160)	03/01-03/31*20 (176/176)
Key Entry	KBD02	FICA Expense	G.A.202	610-10		0.0620	0.0620	0.0620

Fill Notes Close

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Creating an Org Budget

Traditional Method





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.

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.

Traditional Method Org Budgeting – Create Budget

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

Organization Select GreenPinesUK | Deltek Costpoint

Organization ID * Fiscal Year * Include Inactive Orgs

Organization Name

Organization Budget Status Approval Form Query

<input type="checkbox"/>	Organization ID	Type	Version	Status	Fiscal Year	Periods	Closed Period	Complete	Approved	Escalation	Owner	Modified By	Modified
<input type="checkbox"/>	U.C				2020			<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	U.C.000	BUD	1	Approved	2020	12		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	08/03/2017
<input type="checkbox"/>	U.C.000	OLK	1	Working	2020	12	01/31/2018	<input type="checkbox"/>	<input type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	06/14/2019
<input type="checkbox"/>	U.D				2020			<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	U.D.100	BUD	1	Working	2020	12		<input type="checkbox"/>	<input type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	06/14/2019
<input type="checkbox"/>	U.E				2020			<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	U.E.100	BUD	1	Complete	2020	12		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	01/30/2019
<input type="checkbox"/>	U.E.100	BUD	1	Working	2020	12		<input type="checkbox"/>	<input type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	06/14/2019

[Revenue Setup](#) [Labor Escalation](#) [Labor Full Time Equivalent](#) [Labor Paid Time Off](#) [Labor Utilization](#) [Non Labor Percent](#) [Non Labor Dollar](#) [Org Budget Profit & Loss](#)

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.

Organization Select > Revenue Setup 1 of 1 Existing

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

Cost Type	Fee Rate	Default Rev Acct
Direct Labor	7.0000%	400-10
Direct Materials	7.0000%	400-10
Direct Subcontracts	7.0000%	400-10
Direct ODCs	7.0000%	400-10

Default Direct Labor Acct 500-10 Use Fixed Revenue Amount as Total Revenue

Default Indirect Labor Acct 710-10 Fixed/Adjustment Revenue Account 400-10

[Revenue Adjustment](#)
Close

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.

Browse Applications > Planning > Organization Budgeting > Budget/Outlook Processing > Organization Budgets / Outlooks

Organization Select

Organization ID * U.E.100 Fiscal Year * 2020 Include Inactive Orgs

Organization Name Engineering Consulting

Organization Budget Status Approval Form Query

Create BUD Create OLK MODIFY COMMIT DELETE

Organization ID	Type	Version	Status	Fiscal Year	Periods	Closed Period	Complete	Approved	Escalation	Owner	Modified By	Modified	Lab Fee R
U.E.100	BUD	1	Incomplete	2020	12		<input type="checkbox"/>	<input type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	10/22/2019	7.00

Revenue Setup **Labor Escalation** Labor Full Time Equivalent Labor Paid Time Off Labor Utilization Non Labor Percent Non Labor Dollar Org Budget Profit & Loss

Organization Select > Labor Escalation New Copy Delete

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

ID Type *	ID *	Name *	Org ID *	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)	05/01-05/31*20 (160/168)	06/01-06/30*20 (168/176)
Employee	UK003	Braithwith, Laura-Lee	U.E.100	1.0000	1.0000	1.0000	1.0000	1.0000	1.0000
Employee	UK002	Chatham, Ian	U.E.100	1.0000	1.0000	1.0000	1.0000	1.0000	1.0000

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.

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										
Organization ID: U.E.100 Type: BUD Version: 1 Status: Working Setup: COMPLETE										
<input checked="" type="checkbox"/>	ID Type	ID	Name *	Org ID *	Account ID	Program	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)
	Key Entry	KBD01	FICA	U.E.100	610-10		0.0620	0.0620	0.0620	0.0620
	Key Entry	KBD02	FUTA	U.E.100	610-20		0.0600	0.0600	0.0600	0.0600
	Key Entry	KBD03	SUTA	U.E.100	610-30		0.0251	0.0251	0.0251	0.0251

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

Organization Select > Non Labor Dollar													
Organization ID: U.E.100 Type: BUD Version: 1 Status: Working Setup: COMPLETE													
<input checked="" type="checkbox"/>	ID Type *	ID *	Name *	Org ID *	Account ID	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	

Traditional Method Org Budgeting – Org Budget Profit & Loss

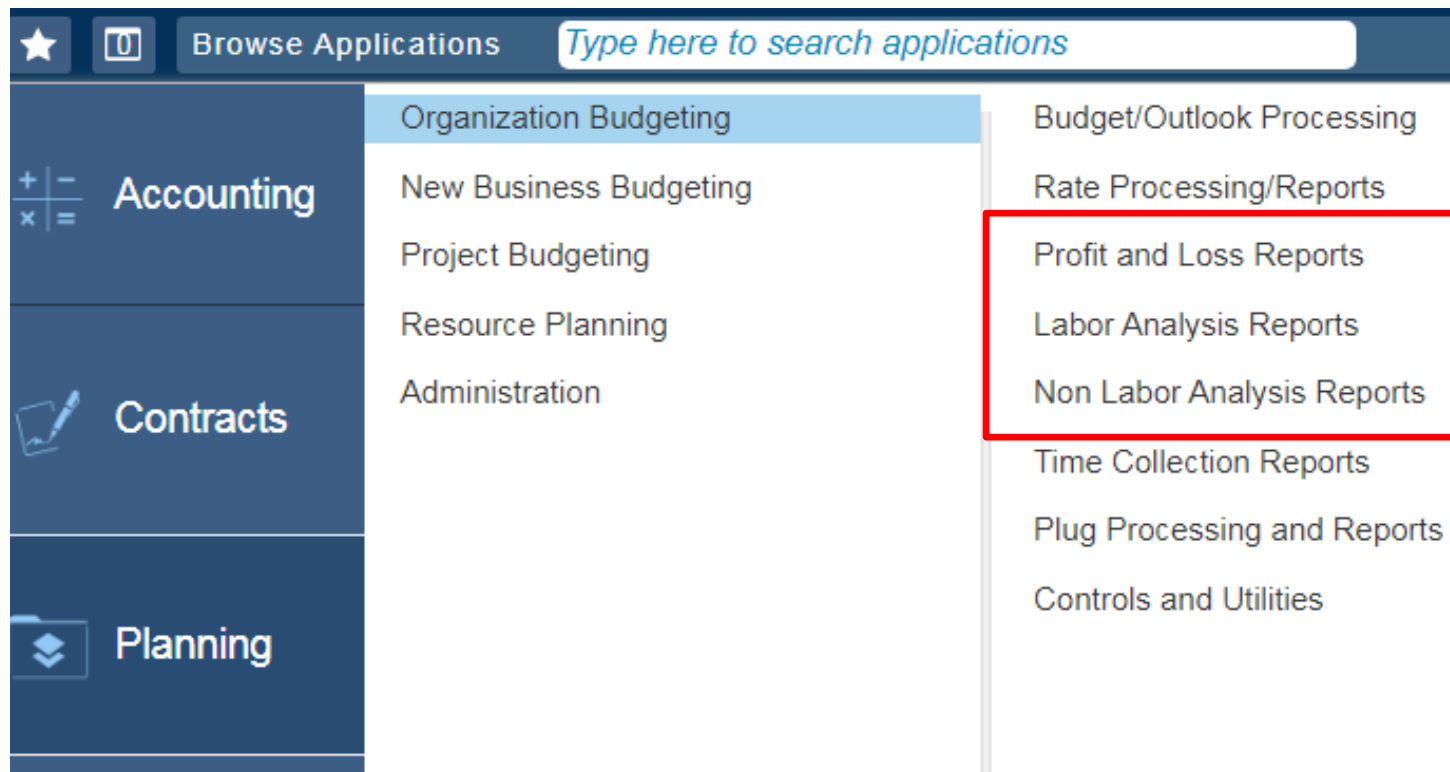
- » The Profit & Loss subtask is available even when the budget is in a Working status. The user can review the affects of the budget data entered.
- » The report has a subtask to drill down into details.

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	09/30/2020	
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	45,703.3	
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	45,703.3	
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](#)

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



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.

Traditional Method Org Budgeting – Plug Processing Calculation

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

The screenshot displays the Deltek software interface. On the left, a navigation menu includes 'Accounting', 'Contracts', and 'Planning'. The main area shows a breadcrumb trail: 'Browse Applications > Planning > Organization Budgeting > Plug Processing and Reports > Plug Project Review (NOP1,NOI1,AOP1,AOP2,AOP3)'. The 'Plug Project Review' page features a 'Report Type' section with radio buttons for 'Plug Project Calculation' (selected), 'Plug Project Review', 'Plug Project Details', 'Plug Project Summary', and 'Budget Risk Summary'. Below this, there are dropdown menus for 'Fiscal Year' (2020) and 'Budget Group' (BUD). An 'Org ID' field contains 'U', and a dropdown menu shows 'GreenPines United Kingdom'. A 'Calculate' button is located at the bottom of the form.

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.

Browse Applications > Planning > Organization Budgeting > Plug Processing and Reports > Plug Project Review (NOP1,NOI1,AO...)

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

Report Type

Plug Project Calculation Plug Project Review Plug Project Details Plug Project Summary Budget Risk Summary

Fiscal Year: 2020 Budget Group: BUD FS Code: INCSTM

Details: Combined Qtrs Summary

Org ID * U GreenPines United Kingdom

Calculate

[Details](#)

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					
<input type="button" value="Expand All"/>		<input type="button" value="Collapse All"/>			
<input checked="" type="checkbox"/>	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

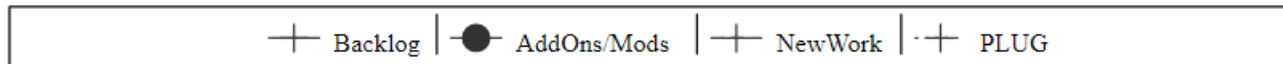
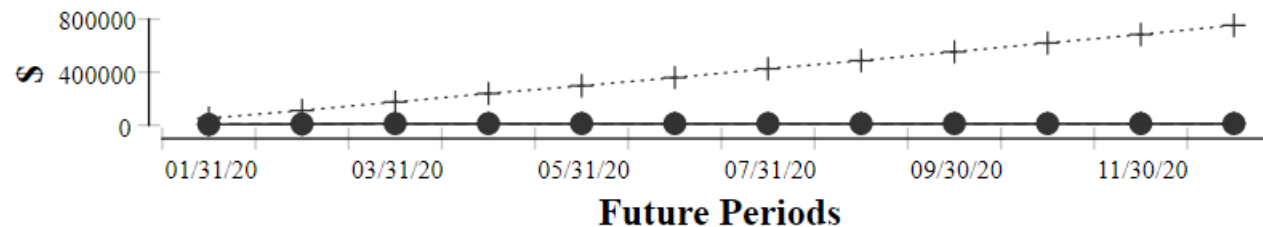
Traditional Method Org Budgeting – Revenue/Risk Analysis Chart

» 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





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.

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.

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.

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'.

The screenshot shows the 'Organization Budget Status' window in the Deltek software. The window title is 'Organization Budget Status' and it includes buttons for 'Approval', 'Form', and 'Query'. Below the title bar, there are input fields for 'Organization ID *' (value: G), 'Fiscal Year *' (value: 2020), and 'Include Inactive Orgs' (checkbox: unchecked). The 'Organization Name' is 'GreenPines EngineeringLLC'. Below these fields, there is a table with columns: Organization ID, Type, Version, Status, Fiscal Year, Periods, Closed Period, Complete, Approved, Escalation, Owner, Modified By, and Modified. The 'Create BUD' button is highlighted with a red box. The table contains several rows of budget data, with the 'Status' column highlighted in different colors (green for 'Approved', yellow for 'Complete', red for 'Working').

Organization ID	Type	Version	Status	Fiscal Year	Periods	Closed Period	Complete	Approved	Escalation	Owner	Modified By	Modified
G.0				2020			<input type="checkbox"/>	<input type="checkbox"/>				
G.0.000				2020			<input type="checkbox"/>	<input type="checkbox"/>				
G.A				2020			<input type="checkbox"/>	<input type="checkbox"/>				
G.A.201	BUD	1	Approved	2020	12		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1.0000%	CPSUPERUSER	CPSUPERUSER	04/24/2019
G.A.201	OLK	1	Approved	2020	12	12/31/2019	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1.0000%	CPSUPERUSER	CPSUPERUSER	07/05/2019
G.A.202	BUD	1	Approved	2020	12		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	12/13/2017
G.A.202	BUD	2	Complete	2020	12		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	05/02/2019
G.A.202	BUD	2	Working	2020	12		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	05/03/2019

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.

G.0.000	BUD	1	Working	2020	12		<input type="checkbox"/>	<input type="checkbox"/>	4.0000%	CPSUPERUSER	CPSUPERUSER	10/10/2019
G.A				2020			<input type="checkbox"/>	<input type="checkbox"/>				
G.A.201	BUD	1	Approved	2020	12		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1.0000%	CPSUPERUSER	CPSUPERUSER	04/24/2019
G.A.201	OLK	1	Approved	2020	12	12/31/2019	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1.0000%	CPSUPERUSER	CPSUPERUSER	07/05/2019

[Revenue Setup](#)
[Labor Escalation](#)
[Labor Full Time Equivalent](#)
[Labor Paid Time Off](#)
[Labor Utilization](#)
[Non Labor Percent](#)
[Non Labor Dollar](#)
[Org Budget Profit & Loss](#)

Organization Select > Revenue Setup
1 of 1 Existing

Organization ID: G.0.000 **Type:** BUD **Version:** 1 **Status:** Working **Setup:** NOT COMPLETE

Cost Type	Fee Rate	Default Rev Acct
Direct Labor	0.0000%	
Direct Materials	0.0000%	
Direct Subcontracts	0.0000%	
Direct ODCs	0.0000%	

Default Direct Labor Acct

Default Indirect Labor Acct

Adjustment Revenue Account

Budget Type *
 Project Status *
 Project Labor
 Project Non-Labor
 Project Revenue

[Revenue Adjustment](#)
[Update Org Labor from Project Labor](#)
[Update Org Non-Labor from Project Non-Labor](#)
[Update Org Revenue from Project Revenue](#)

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.

Organization Select > Revenue Setup

Organization ID: G.0.000 Type: BUD Version: 1 Status: Working

Cost Type	Fee Rate	Default
Direct Labor	0.0000%	
Direct Materials	0.0000%	
Direct Subcontracts	0.0000%	
Direct ODCs	0.0000%	

Default Direct Labor Acct: 500-10

Default Indirect Labor Acct: 710-10

Budget Type * Proj\NB Project Status * -Select-

Project Status dropdown options: -Select-, Completed, Approved

- » Select the minimum 'Project Status' of budgets to be used 'Completed' or 'Approved'

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.

Organization Select > Revenue Setup

Organization ID: G.A.202 Type: BUD Version: 2 Status: Working Setup: COMPLETE

Cost Type	Fee Rate	Default Rev Acct
Direct Labor	0.0000%	
Direct Materials	0.0000%	
Direct Subcontracts	0.0000%	
Direct ODCs	0.0000%	

Default Direct Labor Acct: 500-10

Default Indirect Labor Acct: 503-10

Adjustment Revenue Account: 400-10

Budget Type * Proj\NB Project Status * Completed

Project Labor Project Non-Labor Project Revenue

[Revenue Adjustment](#) [Update Org Labor from Project Labor](#) [Update Org Non-Labor from Project Non-Labor](#) [Update Org Revenue from Project Revenue](#)

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.

Update Org Labor from Project Labor

Organization ID: 01.01.02 Type: BUD Version: 1 Status: Working Setup: NOT COMPLETE

Update Expand All Collapse All

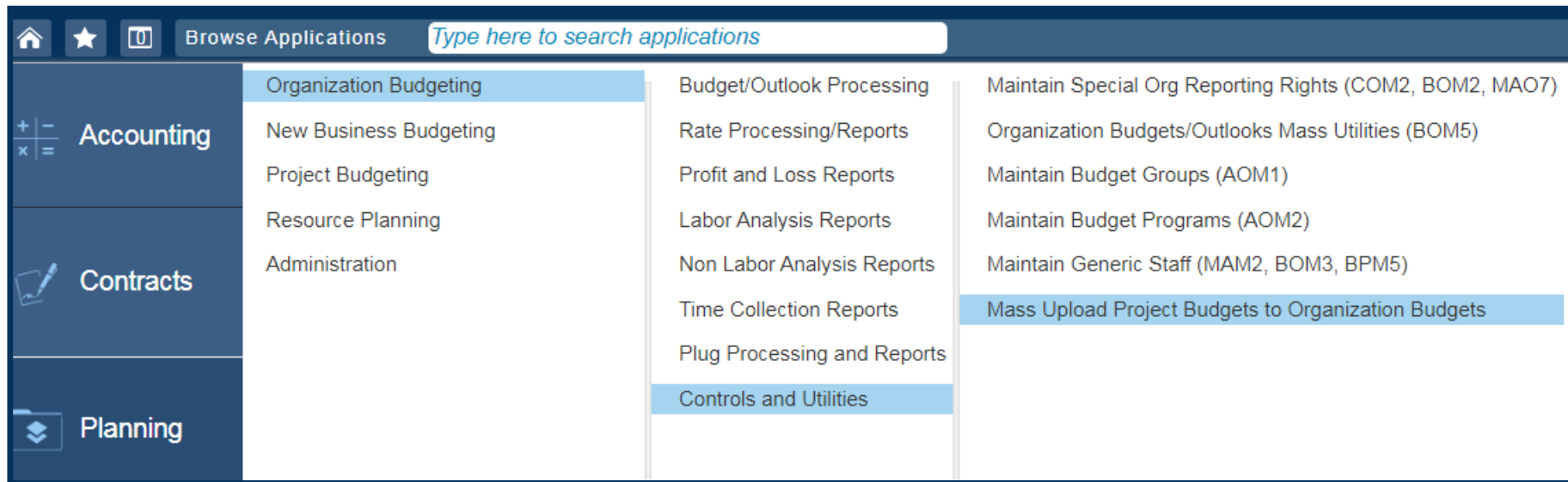
Upload	Description	Status	Org ID	Account ID	Total	01/31/2020	02/29/2020	03/31/2020	04/30/2020	05/31/2020	06/
<input checked="" type="checkbox"/>	Org Budget - 2020 - 01.01.02 - BUD Ver 1	Working			4,017.00	449.00	333.00	325.00	325.00	310.00	
<input type="checkbox"/>	Fox, Georgia (1060)	Working	01.01.02		79.00	42.00	37.00	0.00	0.00	0.00	
<input type="checkbox"/>	10215.01 - EAC Ver 7	Working	01.01.02	50-100-20	79.00	42.00	37.00	0.00	0.00	0.00	
<input type="checkbox"/>	Lim, Christopher (1170)	Working	01.01.02		1,001.00	88.00	77.00	84.00	84.00	80.00	
<input type="checkbox"/>	Marsden, June (1158)	Working	01.01.02		1,023.00	151.00	73.00	80.00	80.00	77.00	
<input type="checkbox"/>	Thompson, Sam (1159)	Working	01.01.02		1,914.00	168.00	146.00	161.00	161.00	153.00	
<input type="checkbox"/>	Total				4,017.00	449.00	333.00	325.00	325.00	310.00	

View Uploaded Labor

Close

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.



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.

The screenshot shows a web application interface for the 'Mass Upload Project Budgets to Organization Budgets' utility. The breadcrumb navigation at the top reads: 'Browse Applications > Planning > Organization Budgeting > Controls and Utilities > Mass Upload Project Budgets to Organization ...'. The utility title is 'Mass Upload Project Budgets to Organization Budgets'. The form contains the following fields and options:

- Fiscal Year *: 2020
- Organization *: All
- Budget Type *: Proj
- Minimum Project Budget Status *: Completed
- Project Labor:
- Project Non Labor:
- Project Revenue:

At the bottom of the form, there are three links: [Update Org Labor from Project Labor](#), [Update Org Non-Labor from Project Non-Labor](#), and [Update Org Revenue from Project Revenue](#).



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.
-

Q&A

Insight 2019	Planning Sessions		
Wednesday Nov 20 th 10.00-11.00am	Emerald 6	CP11 – What You May Not Know About CP Planning and Should	Mike Eaton Lynda Porter
Wednesday Nov 20 th 11.10-12.10pm	Osceola 5-6	CP14 – A Deep Dive into Org Budgeting for Advanced Users	Lynda Porter Mike Eaton
Wednesday Nov 20 th 2.10-3.10pm	Tampa 1-2	CP15 – Project Manager Reporting with Costpoint	Justin Sommer
Wednesday Nov 20 th 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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GAYLORD PALMS > ORLANDO FLORIDA > NOVEMBER 18-21 2019

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