Contract Management (CM) System

Frequently Asked Questions

June ‘23

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Contract Management System FAQs

General Log-In

Q: Is there a preferred browser I should use when using the CM system?

A: Yes, Chrome is the preferred browser.

Q: Do you have to be on the VPN to get into the CostPoint CM System?

A: Yes, you will need to log on to the VPN to access the CM system.

Q: How do I access the test/training environment of the Contract Management System?

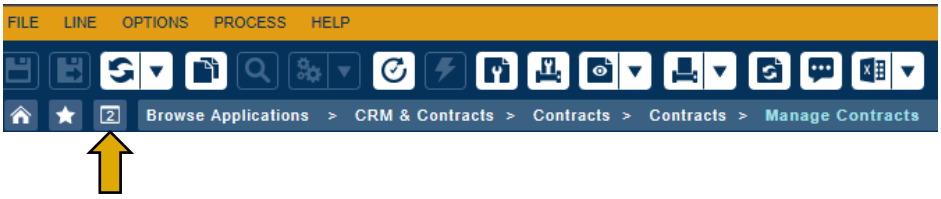
A: Enter this URL in your browser: https://testcpcmd2.gtri.gatech.edu/

Navigation and "Where Can I Find"

Q: Can I open Multiple Applications simultaneously in CM?

A: Yes. To open multiple applications in the CM system:

- Click "Browse Applications" and follow the path to the application.
- To see/switch between applications you have open, click on the box with the number in it (see screenshot below). The number indicates how many applications you currently have open. You can also close applications by clicking the "x" to the right of the application name.
- To close the Open Applications box, click the box with the number on it again.



Q: How can I easily view details of multiple records?

A: Use the arrows to navigate through the records.

Q: Is there a reference video that we can watch detailing CM System Navigation Tips?

A: Yes, a quick Costpoint Video on Navigation Tips can be found at:
https://help.deltek.com/product/costpoint/8.0/GA/uss/Navigating/

Q: Where can I find a field for Project Type in the CM System?

A: Project Type can be found in the General Tab of Opportunities>Opportunities> Manage Opportunities in the Contract Information Section

Q: Where can I find Budget Information in CM?

A: Grants & Contracting will read Budget file that is uploaded in CIS and enter the required data in Workday. In CIS, the Budget tab will include link to the appropriate Workday report to see Budget Details.

The entire budget is not entered into the CM system as it is in G&C. Only the proposed amount is uploaded into the CM system under the Financial Data Tab in Opportunities>Opportunities>Manage Opportunities. When entering the proposed Budget amount you need to put awarded amount less 5% fee (i.e.: Proposed amount $100.000, 5% fee of $5,000. Enter $95,000 in Proposed Amount).

Q: Where can I find the History Log?

A: The History Log Tab can be found in the Subtask Bar.

General CM

Q: How is Doc ID generated?

A: The CO must update the Stage/Status to L – Accepted in order for the system to generate the Doc ID and for the emails for any pending reviews initiated from the Opportunity to be sent.

Q: To confirm, we can search by Doc ID in Opportunities, but not in Contracts? Is there any plan to allow Doc ID search in Contracts? This would be very helpful for us, because it is the most consistent number – it stays with a project through mods and award, whereas P-numbers are new each mod and an Award number doesn't issue for each proposal. We also have historically used the Doc ID to name files in our records.

A:

- All attachments captured in eRouting before and after submitting the Proposal to OSP will be sent to CM. You can locate those documents using the Documents ***subtask*** on the Opportunity.
- All Small Business Plans (if required on the Opportunity) will be uploaded and attached to the Opportunity by the Small Business Plan Team (Bruce/Michael)
- All Contractual Documents will be uploaded via DataMagine and accessed via CIS. This process uploading and accessing contractual documents is not changing in this release (D2)

Q: What happens in the CM system if the CO has to return a proposal to the PD?

A: If a CO returns a proposal to the PD, the CM system will lock the proposal until the PD returns it.

Q: In the CM system, what must happened before a Contract can be created?

A: In order for a Contract to be created:

1. The proposal must be in "Awarded" status

2. It must be a New Proposal
3. The proposal cannot be attached to any other contract

Q: Is there a way to link a pre-award NDA to a new proposal?

A: Not yet. We will explore this for a future enhancement.

Q: Can I export data from the CM system into Excel?

A: Yes, by following the steps below:

1. Query the data you need
2. Click the box on the far left next to each record you want to export or click the box with the checkmark at the top left to select all records.
3. Then, on the very top menu bar, click "Line"
4. From the dropdown menu, choose "Copy Data to Insert into Excel"
5. A new box will open that contains all of the data and it is already highlighted.
6. Press Ctrl-C to copy row(s) data to clipboard.
7. Open Excel
8. Press Ctrl-V to paste the data into Excel.

Q: What is the best way for Contracting Officers to communicate with the PD/PI?

A: Contracting Officers are encouraged to contact the PD through the CM System using the activities tab. This allows for traceability and for all activities to be captured in the History Log.

Q: Are the terms "Proposal" and "Opportunity" interchangeable?

A: Once a proposal leaves eRouting and enters the CM system it is call an "Opportunity."

Q: What are the steps of review while in L (Accept) Status?

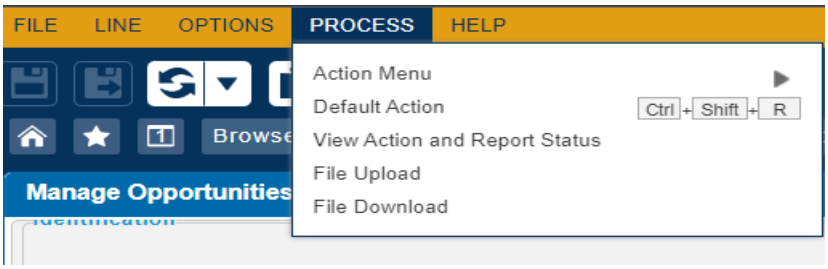
A: Make sure sponsor is a Customer, make sure Proposal doesn't need to be returned for missing information, check for appropriate approvals and/or documents, check that Due Date to sponsor is populated with instructions on how proposal should be submitted.

Q: What does the red asterisk mean next to field names?

A: Any field that has a red star means that the field MUST be completed as it contains REQUIRED information.

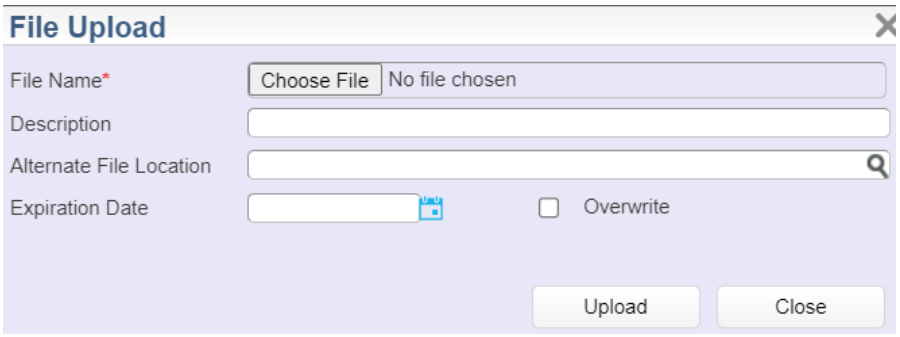
Q: How do I upload documents to the CM System?

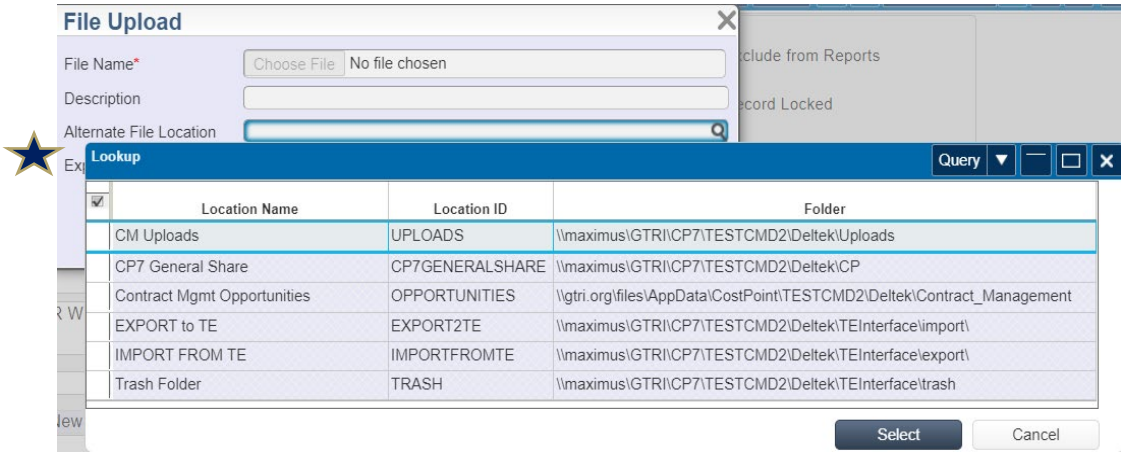
A: To upload a document in the CM System, click on the process Tab and then File Upload.



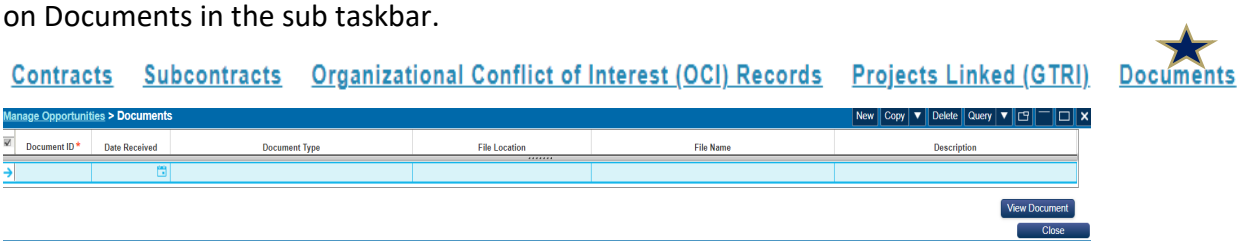
Next, select the file from your local machine and then select a folder for you to upload.

CO can Choose File or click Alternate File Location to find file for uploading.





Once file is uploaded successfully, the file needs to be associated with an opportunity or contract. To associate the file with an opportunity or contract, In Manage Opportunities, click on Documents in the sub taskbar.



Click New to add a new row, then select the file location where you uploaded the file and then select the actual file.

Q: Can I copy from the CM system to Excel?

A: Yes. Using the **Export to Excel** function within the CM system allows you to Copy any screen that can be viewed in a **Table View** format and paste it into Excel. This functionality then allows users to **Sort and Filter** the raw data in Excel, rather than printing a report from the CM system.

eRouting

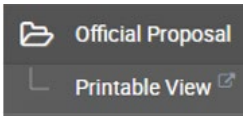
Q: What are the primary changes to eRouting?

A: While enhancements are continually rolling out, these are the primary changes you will notice from the latest enhancement:

1. **On the feft side navigation bar**:
   - You'll see ***Printable View*** instead of the former *View Routing Sheet*.
   - Also of note, you'll see an ***Official Proposal*** section, where in the current delivery of the Contract Management System development, PDs/PIs and others with appropriate access will be able to pull official documents from for use in other systems, once OSP accepts the proposal routing sheet.
   - The ***History*** tab will include all related actions, including those taken within the Contract Management System by the Contracting Officers.
   - Instead of *Take Actions*, you'll initally see the verbiage ***Submit for Approvals***.
   - Once the routing sheet is submitted for approvals, the Initator and PD/PI will then see ***Take Actions***, where they can add comments and see the phase of approvals the routing sheet is in.
2. **In the PD/PU section,** a new checkbox option is included to indicate that the proposal involves a ***Transitional Faculty Name***, where the initatior can also provide the individual's name.
3. **In the Title Section,** there is a new field to indicate whether this proposal is considered one of the ***Special Programs*** listed. There is also the option to select that the ***Special Program is not located***, which will then populate with additional information about the Special Program Manual
4. **In the Proposal section,** you will notice the following changes:
   - Proposal Type is now **Proposed Award Type**
   - Type of Award is now **Proposed Funding Type**
   - **New Proposed Award Types** not previously entered into eRouting including:
     - Basic Ordering Agreement (BOA)
     - Interagency Personnel Act Agreement (IPA)
     - Task Order
   - Note that Economic Partnership Agreement (EPA) has been removed as an Award Type
5. **Keywords** are now REQUIRED.

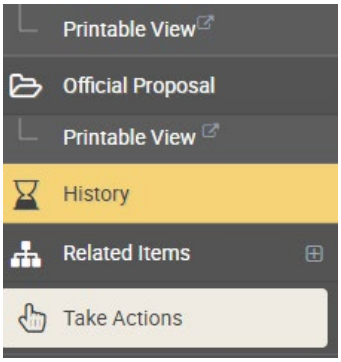
Q: How do I view the official proposal after it is accepted by OSP?

A: You'll see an *Official Proposal* section, where in the current delivery of the Contract Management System development, PDs/PIs and others with appropriate access will be able to pull official documents from for use in other systems, **once OSP accepts the proposal routing sheet**.



Q: What information is collected in the Proposal History section during the Proposal Lifecycle?

A: **T**he Proposal History section of the routing sheet will not only show the history of items completed in eRouting, but will also show the user any action taken on the official proposal. (i.e. if OSP submits the proposal to the sponsor, it will be logged into the history from the Contract Management system).



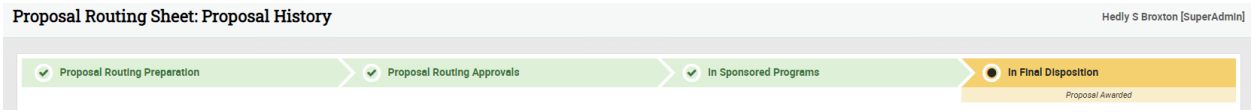
For each routing sheet, a left-hand menu bar option to review the history of the routing sheet exists.

Clicking this link will provide details of any action taken, any comments, the date and time of the action, and who the action was performed by.

Users may also use the History feature to see the messages with/from the CO and others, and what information was added to the official record.

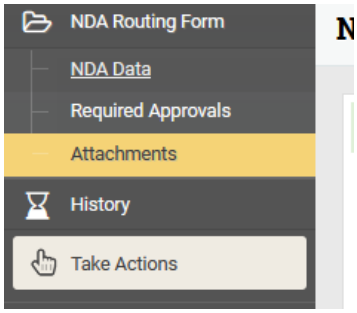
Q: Is there a way I can keep up with where the routing sheet is in the lifecycle?

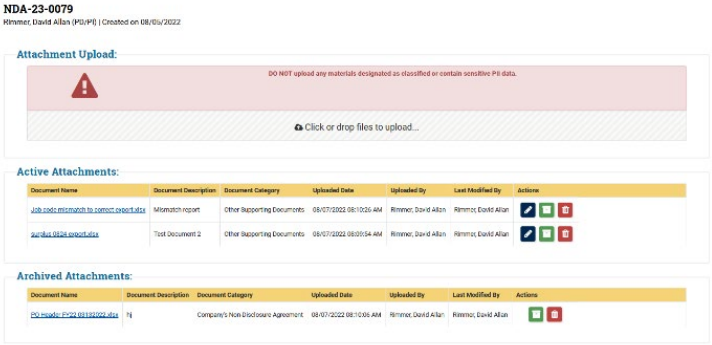
A: Yes. At the top of each routing sheet, a progress bar shows where in the full lifecycle the routing sheet is in. This is a real-time status indicator.



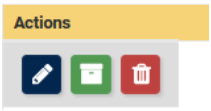
Q: How do I upload/edit/delete attachments in eRouting?

A: For each routing sheet, the left-hand menu bar also includes the option to manage (add/edit/delete) attachments. If the Attachments link is selected, the following page displays:





Documents can be uploaded, deleted, or edited by using the action icons:



Edit – Change name and type of document
Delete – Remove the document altogether
Archive – Will still be associated with the routing sheet, but when the sheet is submitted to OSP, these will not be included as attachments.

Q: Will satisfying deliverables in CIS change in any way?

A: In this iteration of development, nothing will change in the functionality of how users satisfy deliverables in CIS, however, CIS will now be linked with the new Contract Management System.

Managing Opportunities

Q: What will be used for the opportunity ID?

A: The P# will be pushed in from e-Routing and used as the Opportunity ID.

If a proposal is manually entered then an "M" should be placed in front of the number. The number will be the next consecutive number used in the manual process. The user should do a query on Opportunity that begins with "M" to find the next number.

Q: What is the name field for?

A: The title of the proposal will be pushed into this field. There is a character limitation causing the title to truncate. Therefore, the full title will be captured in the Short Description Field.

Q: How is the status feature used?

A: The proposal will remain in "Active" status until the Administrative Team changes it to "Inactive".

Q: Should I exclude an opportunity from reports?

A: Select this check box to exclude the opportunity from reports available in the Contracts domain. This is important when you need to generate reports and exclude certain types of opportunities (for example, indefinite delivery/indefinite quantity and blanket purchase agreement opportunities).

Each directorate should determine which records should be excluded from public reports. If this is required then use this feature to exclude records from public reports.

Q: Am I required to enter a Federal Agency and/or Federal Sponsor under the General Subtask?

A: Only if it is a federal flow through

Q: Who should I list in the primary home department field?

A: The home department from the proposal. There is one primary. Secondary units will be captured via the TEAM Tab. If researchers are involved from the secondary unit, make sure you identify the secondary unit in the notes section.

Q: Is there a list of the different Opportunity Stage Codes and Descriptions?

A: Yes. Click **here** to see a list of Stage Codes and Descriptions.

Managing Contracts/Deliverables

Q: Is it better to use Table View or For View when managing contracts?

A: It may be preferable to use the Form View when setting up deliverables and the Table View when viewing list of deliverables.

Q: What proposal requirements are necessary to create a new Contract?

A: In order to create a new contract, **the proposal must be in Awarded status in Opportunities** (record has been reviewed and nothing is pending), it must be a **new proposal**, and it **cannot be attached to any other contract**. Opportunity will not show up in the Opportunity Field for you to select if it has not been awarded.

Q: What should go in the Costpoint Project Type Field?

A: The Costpoint Project Type Field (Deltek out of the box required field) entry will replicate what is in the Contract Type field (i.e. CRNF, T&M, and FFP)

Contract Type code	Contract Type Description	GTRI Only (mapping)
CPAF	Cost Plus Award Fee	Not Used
CPFF	Cost Plus Fixed Fee	CPFF
CPFFL	Cost Plus Fixed Fee LOE	Not Used
CPIF	Cost Plus Incentive fee	CP_INCENTIVE
CRNF	Cost Reimbursement No Fee	CRNF
FFP	Firm Fixed Price Contract	FFP
FFPAF	Fixed Price With Award Fee	Not Used
FFPPASS	Fixed Price Plus Pass Through	Not Used
FP	Fixed Price	FFP
FPL	Fixed Price LOE	FPL
FR	Fixed Rate	Need to map
LH	Labor Hours	Need to map
LOA	Letter of Authorization	Not Used
RISK	Work at Risk	Not Used
TM	Time & Materials	T&M

Q: What are the steps necessary to enter a unique (non-reoccurring deliverable?

A: To enter a unique (non-reoccurring) deliverable:

- Enter “1” in the Number field for the first deliverable, if there are additional unique deliverables you will need to enter the next sequence number in that field

- Enter the name of the deliverable in the Description field
- Enter Sponsor Due Date
- Select Type
- Click Save and Continue
- To create another deliverable, click the New button and repeat the above process (Use the next sequential number in the number field)

Q: What are the steps to enter a reoccurring deliverable?

A: To enter a reoccurring deliverable:

- Enter "1" in the Number field for the first deliverable
- Click Reoccurring Template box
- Enter the name of the deliverable in the Description field
- Enter Sponsor Due Date
- Select Frequency from drop down
- Select Type
- Enter Begin Date and End Date for the first deliverable
- Click Save and Continue

Q: Do new deliverables show up immediately in CIS?

A: No. Be aware that NEW deliverables take several hours to update in CIS. However, if you edit a deliverable, the update will show up immediately.

Q: How do I toggle back to the Opportunity Page (or other pages) from Contracts?

A: If you need to toggle back to the **Opportunity Page** (or other pages), you can click the Menu button to the right of the start button in the header.

There is also a shortcut to toggle back to the Opportunity Record: By clicking on the link in the Name field (Abbreviated Name), it's hyperlinked so the system will automatically toggle you to the Opportunity Field.

Managing Modifications

Q: Where do I go in the CM System to modify an existing record?

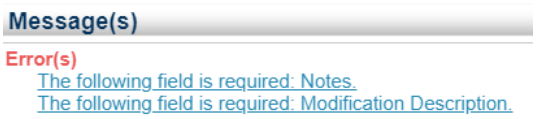
A: To modify an existing record, go to **Contracts>Contracts>Manage Contracts.** Then, use the Query feature to pull up the applicable award you wish to add the modification to. Next, click on the **Award Actions Tab** then the **Award Actions** link. To enter a new record, click the **New** button which will bring up an **Awards Action>Identification** form to create a modification. Fill in form as completely as possible.

Q: How do I view all contractual actions added to a Contract?

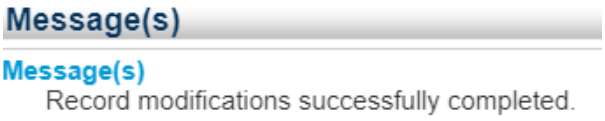
A: Contractual actions added to the contract will show in the table format. If you do not see all, you can click **Expand All** to see full list. To see the details of each contractual action line, select the box to the far left, then select **Award Actions**. Details will then be visible.

Q: What happens if I get an Error message when trying to create a Mod?

A: If you have not completed all of the required fields, the record will not save, and the system will show error messages at the bottom of the page as below. You can click on each error link to complete the required field.



Once errors are taken care of, click the Save button. If Save is completed successfully, you will see the following in Message(s):



Q: Is there a way that I can double check to see if the Mod went through?

A: To double check to see if the Mod went through, you can go back to the **General Tab** and click on **Award Actions**. You should see the newly created Mod in the Table.

Compliance

Q: What happens when a PD/PI checks a proposal compliance box in eRouting?

A: In eRouting, PD has opportunity to check appropriate proposal compliance boxes in the **Special Review Checklist**. If a box is checked, an email will be automatically sent to the appropriate Compliance Officer for them to take action.

Q: Can a CO kick-off a Compliance process in CM if not done so by the PD?

A: If PD does not check any boxes in the **Special Review Checklist**, the Contracting Officer also has the opportunity in the CM System to kick-off the Compliance Process.

Q: What is the purpose of the fields under the Considerations Tab?

A: The purpose of the fields under the Considerations Tab is to help the CO manage risks. The fields are used as follows:

- Foreign Tax Implications - This should push in from eRouting but the CO needs to validate it.
- High Risk – This is the option to flag as high risk.

- Background IP – This should push in from eRouting but the CO needs to validate it.
- IRB - This should push in from eRouting but the CO needs to validate it.
- IACUC - This should push in from eRouting but the CO needs to validate it.
- D&B Requested – The CO will complete this if needed.
- Management Plan – The CO will complete this if needed.
- Third Part IP - This should push in from eRouting but the CO needs to validate it.
- Known Litigation – This is not required but can be tracked using this field.
- Data Rights – This can be tracked if they were asserted at the proposal stage.
- Cyber Security Mitigation – This is used if a mitigation plan is needed prior to an award.

Q: What are the steps to review once a Compliance email is received?

A: The steps are as follows:

1. Compliance boxes checked in either eRouting or CM
2. Email Received by Compliance Officer
3. Email link will navigate Compliance Officer to eRouting
4. Compliance Officer will go to history and put a comment on their decision in the Comment Box

Small Business Plans

Q: If we, if we prepare a small business plan for a contract and we know that there are 2 subcontractors in the proposal and they are part of the sub, the subcontracting plan. And let's say they are a subcontractor. That is a large business or another university and the amount is over $750,000 for the piece that they're that they are doing. If this proposal gets awarded as a contract, then Georgia Tech is required to flow that FAR clause that small business, subcontracting plan, FAR clause down to any large business subcontractors? Is there any notification that the Sub Award team receives that they need to flow those clauses down?

A: The Subaward team has a checklist they use when issuing subawards. One of the questions on the checklist is if the subaward is over the required dollar threshold for small business plan. If yes, was the clause included in the terms and was a small business plan received. You will need to check with Steve to make sure his COI's are still doing this. The FAR/DFAR flowdowns attached to subcontracts under a DoD award includes the FAR requirement.

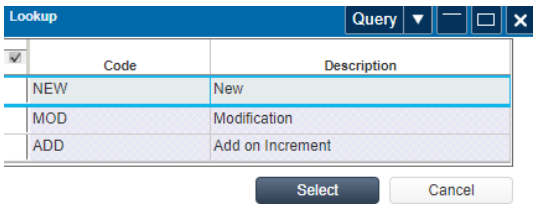
Lookup/Search/Query

Q: How do I access and use the Lookup function in the CM System?

A: Use the Lookup function to select from a list of values that are valid in particular fields. To access this feature, click the Lookup icons (either on the Global Toolbar or in the selected field). Alternatively, you can press **F10** after you click in a field that has the Lookup function. This function is useful when you do not have the exact value need to complete a field.
Global Toolbar Lookup

Selected Field Lookup (Any field with a blue bar has the Lookup function)

When you click in any field with a blue bar, a magnifying glass will appear. Click on the magnifying glass to begin your lookup. A dialog box will pop up displaying the values that you can enter in the field.



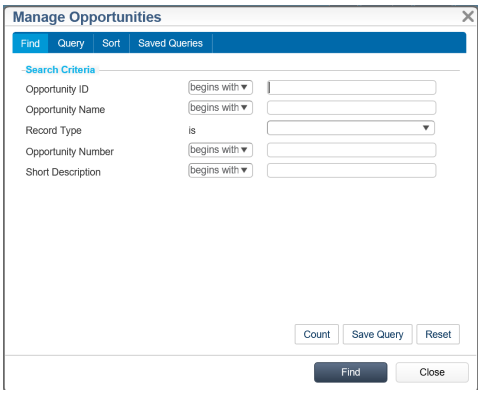
When you select a value in the dialog box, the screen transfers the selected information into the field. You can also click Query to filter the results in the Lookup dialog box using the Query functionality (Find, Query, sort, and Saved Queries).

Q: How do I use the Query Feature?

A: The Query function in CostPoint allows you to search for a single or multiple existing records on the tables used by a particular screen. You can perform basic and advanced searches using the Find, Query, Sort, or Saved Queries tabs on the Query dialog box.

There are four tabs across the top of the Query Dialog Box:

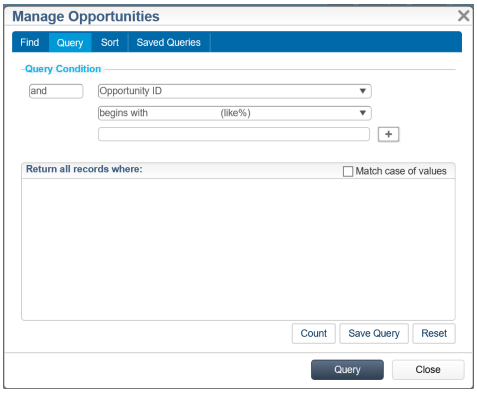
<u>Find Tab:</u>



Use the Find Tab to retrieve records using specific fields on the “Search Criteria” group box.

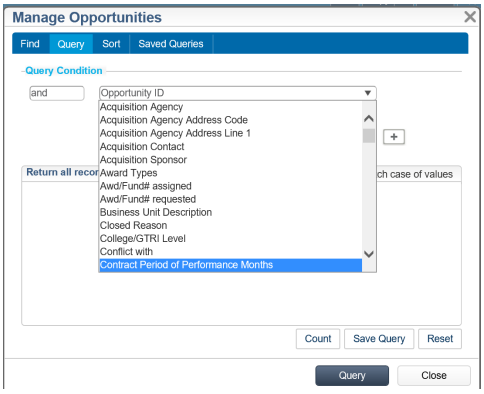
Note: To retrieve all records, do not enter anything and click “Find” at the bottom of the dialog box.

Query Tab:

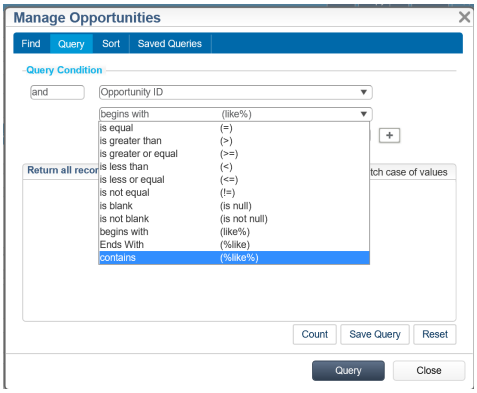


Use this tab to create custom criteria for the search process. Enter the following for each query condition:

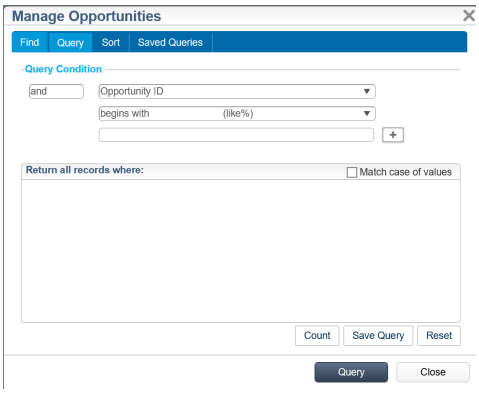
- Field: The field that you want to use in the search.



- Relation: The logical operator for the condition statement.

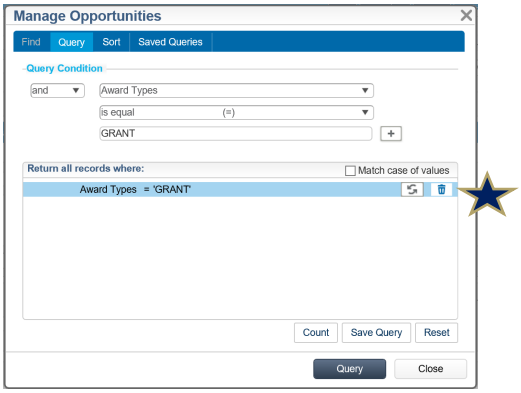


- Value: The field data or part of the data.

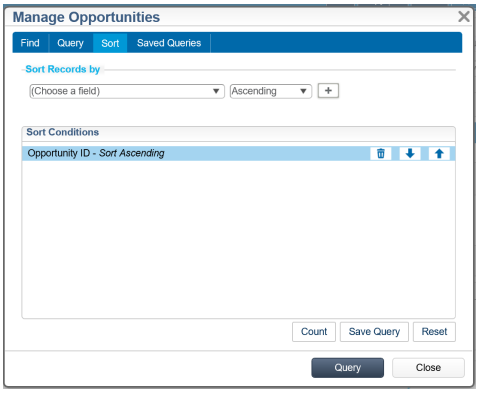


After you fill in the query conditions click the "+" to add it to the query. You can enter multiple conditions. Once you have entered all the conditions, click the "Query" button at the bottom of the dialog box to retrieve the records that match your conditions.

To remove a condition, click the trash can next to the condition you want to remove as shown below:

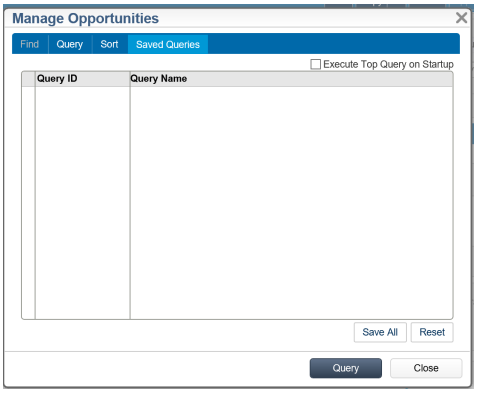


Sort Tab:



Use this to define the display order of your search results. Select the fields that will be used to sort the records and the order of the search results. These settings will be used when you run the search process on the **Find** or **Query** tab.

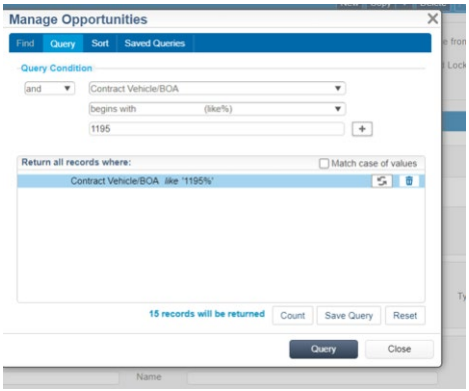
Saved Queries Tab:

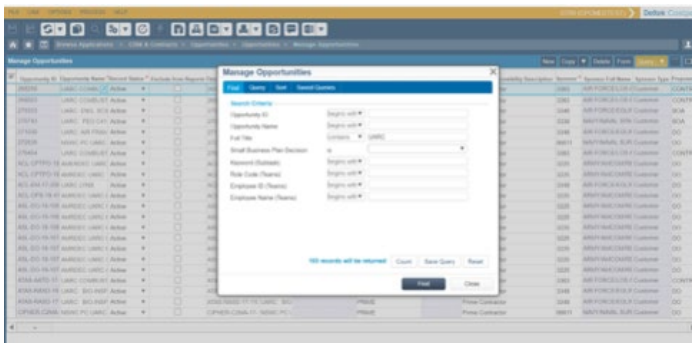


Use this to view or run previously saved queries for the screen. You can also clone and delete existing saved queries.

Q: How can I search by sponsor name to link a BOA to DO?

A: Create a Query to see all DO opportunities associated with a BOA.





Q: How do I find a specific contracting officer's proposals, a specific contracting specialist proposal or my proposals?

A: Within the Opportunities Module, click on Query. Using the "Query" option select Contracting Officer or Contracting Specialist as the search criteria. Enter the name of the individual.

Q: How do I find a PD/PI's proposals or Co PD/PI?

A: Within the Opportunities Module, click on Query. Using the "Query" option select PD/P or CO PD/PI as the search criteria. Enter the name of the individual you wish to see the proposal for.

Q: How do I find a specific opportunity?

A: Within the Opportunities Module, click on Query. You can use the "Find" option to query on the Opportunity, which is the P#, if applicable. Note: not all proposals have a P#. You can search on the Name, which is the title of the proposal, using the "begins with" or "contains"

search criteria. You can also use the “Query” tab and search on any of the fields in the Opportunity screens. (see above instructions)

Q: How do I find all mod proposals linked to a main opportunity?

A: Within the Opportunities Module, Click on the “Query” tab and search on either the Fund/Award Number for the Main Opportunity. If the title is the same you can query on the Opportunity Name or the Short Description fields. Use the “contains” query feature for broader range of results.

Q: How do I find contract linked to an opportunity?

A: Use the Subtask labeled “Contracts” located at the bottom of the screen the see contracts linked to the Opportunity. If the Opportunity is a Contract Vehicle (formerly referred to as a BOA) then you see all the task orders linked to the Contract Vehicle. Main Opportunity and mod proposals will only have 1 proposal linked.

Q: How do I find opportunities linked to a Contract Vehicle?

A: Within the Opportunities Module, click on the “Query” tab and search on the Contract Vehicle #. The results should be all proposals where the Contract Vehicle was identified in the Opportunity record.