

Insight 2011 - Pre-Conference Workshops

Track	Topic Code	Title	Abstract	Session Timeslot	Room Name	Primary Speaker	Credit Type
Pre-Conference Workshops	PCW-CP1	Costpoint Advanced Revenue Concepts (\$575)	Advanced Revenue Concepts deals with unraveling the mysteries of revenue in Costpoint. This workshop will provide hands-on exercises in the creation and recovering from various revenue issues, including changing the revenue formula and the level of the revenue formula. Subject matter includes basic revenue setup, the use and effect of revenue adjustments, diagnosing and correcting erroneous revenue computations, and the issues associated with the use of the Revenue Redistribution application. Additionally, we look at changing the Owning Org of a project, setting up the accrual for award fee, and use of the Cost Transfer functionality for Income Statement presentation. Significant time is dedicated toward analyzing how revenue is stored in the Project Ledger and making use of the Project Ledger Inquiry screen to uncover revenue issues. This is a hands-on class and the student needs to have exposure to Projects and Projects Processing and Reporting prior to taking this course. □ A non-refundable fee of \$575 is charged at the time of payment.	May 16 2011 9:00AM - 4:30PM	Jackson A	Shovar, Susan	
Pre-Conference Workshops	PCW-CP2	Costpoint Billing and the Unbilled Receivables Reconciliation (\$575)	The unbilled receivable account poses one of the most challenging reconciliations for both new and experienced users. This course reviews the dual tracks for billing and revenue and the complex interactions that result in the creation of an unbilled balance. We examine techniques and tips for analyzing the account and identifying issues using the CAPITAL Reconciliation program. This course includes a comprehensive exercise to reconcile a project. A non-refundable fee of \$575 is charged at the time of payment.	May 16 2011 9:00AM - 4:30PM	Jackson B	Luczyk, Greg	NASBA
Pre-Conference Workshops	PCW-CP3	Query Studio (\$575)	Costpoint Enterprise Reporting - Query Studio is an ad-hoc reporting tool that allows users to easily create reports without SQL knowledge. This course focuses on the delivered reports, and it examines how to modify existing reports and how to create new reports in the Query Studio environment. We also review how to create basic reports, apply filters, format, sort and group, create calculated fields, as well as create page breaks and sections within custom reports. This class is for Business Author licensed users and functional users without SQL knowledge. To reinforce instruction, hands-on lab activities are offered to enable clients to work with the application. □ A non-refundable fee of \$575 is charged at the time of payment.	May 16 2011 9:00AM - 4:30PM	Jackson C	Smith, Penny	
Pre-Conference Workshops	PCW-EPM1	Transitioning to Cobra 5 (\$575)	This course is designed for existing users of Cobra 4.7 to prepare for Cobra 5. This course covers new terminology, new user interface, navigation and menus, process changes with the use of wizards, converting data, and security. A non-refundable fee of \$575 is charged at the time of payment.	May 16 2011 9:00AM - 4:30PM	Jackson D	Visser, Marsha	
Pre-Conference Workshops	PCW-IND1	A Best Practice Approach to Preparing Future Leaders (\$600)	The Strategy of Hope is not a best practice approach to preparing future leaders. Nearly every firm recognizes the need to develop its future leaders, but most struggle to do it successfully. Why do so many programs fail to make a difference in preparing firm leaders? How do you identify your future leaders, and what are the best practices for preparing them for the roles they'll soon play? How do you ensure that your firm has adequate bench strength and that current leaders don't abdicate their responsibility to help create the firm's future? Join us for this fast-paced, highly interactive pre-conference! □ A non-refundable fee of \$600 is charged at the time of payment.	May 16 2011 9:00AM - 4:30PM	Lincoln C	Bartz, Tim	
Pre-Conference Workshops	PCW-IND2	Change Management (\$600)	Even when organizations know they need the new process, methodology, or system, making the transition a reality can be difficult. Organizations that haven't had much positive experience managing broad change will find it even more challenging. During any wide-scale change difficulties may be experienced at all levels of the organization, from executives and middle management to individual workers. In this highly informative and interactive session, participants will be led through an overview of a structured approach to organizational readiness through a series of discussion activities and simulations. Participants will have the opportunity, using tools provided, to assess their organization's current state and identify next steps for achieving organization success. A non-refundable fee of \$600 is charged at the time of payment.	May 16 2011 9:00AM - 4:30PM	Lincoln D	Holloway, Mason	
Pre-Conference Workshops	PCW-IND3	Federal Government Contracting Fundamentals (\$600)	This course provides an overview that introduces participants to characteristics of the government contract environment. It provides information on the essentials of government contracting, a description of unique characteristics and terminology of government contracting, and the various roles of government personnel. Participants will learn about case treatment concepts, the theory of indirect rates, how to read the FAR and CAS, major regulatory compliance requirements, and the audits that arise from them. Additionally this seminar provides an overview of the procurement cycle, how to read a government contract, and an overview of the current regulatory environment. A non-refundable fee of \$600 is charged at the time of payment.	May 16 2011 9:00AM - 4:30PM	Lincoln E	McGrath, Chris	
Pre-Conference Workshops	PCW-IND4	Risk Management (\$600)	In this course participants will work through the proactive approach to threat and opportunity based on a clear understanding of the nature of both qualitative and quantitative approaches to risk management. Risk Management examines threat and opportunity from both a top-down and bottom-up perspective using a proven eight-step risk management process. Using effective tools, including a highly regarded risk assessment model, participants will learn how to evaluate and respond to risk at the project and task levels. A non-refundable fee of \$600 is charged at the time of payment.	May 16 2011 9:00AM - 4:30PM	Washington B	Gilbert, Jonathan	
Pre-Conference Workshops	PCW-V11	Vision Project Manager Fundamentals (\$575)	Designed for project managers, this class provides a basic understanding of how to begin working with Deltek Vision. It demonstrates how to navigate within Vision and work with Vision's expanded reporting capabilities, including setting report options, selecting columns, and sorting and grouping data. Participants review how to save both report options and frequently used searches in order to create "favorite" reports for future report runs. We review how to modify certain key reports, including the Project Earnings, Project Progress, and Project Top-Bottom Performers Report. Project managers will learn how to set up the dashboard to provide frequently used information for their specific needs. Project Manager Fundamentals also highlights the Project Review application and how to enter Project Budgets. A non-refundable fee of \$575 is charged at the time of payment.	May 16 2011 9:00AM - 4:30PM	Jackson E	Reeves, Bill	
Pre-Conference Workshops	PCW-V12	Vision Workflow and Vision Designer (\$575)	Vision Workflow facilitates a more collaborative working environment for firms using Vision by automating the flow of information among various users. This session focuses on how to set up Vision 6 Workflow functionality to create events, establish selection criteria, and trigger actions that will occur automatically. This involves the validation of information, automatic generation of user-defined email, dashboard alerts, and the creation of calendar activities. Vision Designer enables participants to customize the business foundation of Vision 6 as delivered with Microsoft® Smart Client technology features. It demonstrates how to access the Screen Designer tools to design forms that support a firm's unique business practices. Session participants will learn how to customize standard Info Center screens, tabs, fields, and grids and how to customize standard report labels and Lookup labels. They will also learn how to work with the enhanced Navigation Tree Designer application. In addition, this session teaches participants how to link previously created scheduled workflows to Info Center tabs so that these workflows may be executed manually and immediately as required. SQL programming knowledge is not required to create and use the workflows discussed in this session and created during lab activities, however some actions discussed require SQL programming knowledge. A non-refundable fee of \$575 is charged at the time of payment.	May 16 2011 9:00AM - 4:30PM	Jackson F	Hibner, Allen	

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Pre-Conference Workshops	PCW-VI3	Vision Reporting Fundamentals, Analysis Cubes, and Security (\$575)	In the first portion of this course, participants will review the new standard Vision 6 reporting functionality and its enhancements—layout, formatting and columns, and sorting/grouping features. In addition, we will review the expanding/collapsing report output and report archive options. For users who prefer customized reporting, the use of Analysis Cubes in Microsoft® Excel® 2007 is less complex and does not require a command of the Vision database structure that full report customization does. In this segment of this course, participants will observe reporting on consolidated project and general ledger data using workbooks with Excel. Users familiar with Excel and pivot table reports can quickly rearrange workbook information with drag-and-drop functionality, as well as display results on hierarchical time dimensions and see transaction detail with drill-downs. The final Security segment of the course concentrates on creating custom access roles for users. We review how to allow employees access to specific Vision applications, processes, and Info Center records while preventing access to other system areas. We will demonstrate how to set record-level accounting and functional area security-access rights options. Participants will also observe how to set up password policies and assign passwords, security roles, and Microsoft® Windows®-integrated logons (if utilized) for each Vision user. A non-refundable fee of \$575 is charged at the time of payment.	May 16 2011 9:00AM - 4:30PM	Lincoln A	Farmer, Julie	