

# THE RSM GOVCON WEBINAR SERIES: WEBINAR #1

## TOP 3 REASONS TO CHOOSE MICROSOFT WITH RSM GOVCON OVER DELTEK

January 27, 2021



## Future Webinars in the RSM GovCon Webinar Series

- **March 2021** – How to break up with Deltek – Provisional to Final rate calculation with a new system – Microsoft and RSM GovCon
- **May 2021** – How will Microsoft and RSM GovCon help you handle a DCAA audit?
- **July 2021** – Your Project Operations team is limited by Deltek. What can you do about it?
- **September 2021** – Advanced Microsoft Platform Features all Deltek Users are missing
- **November 2021** – You won't find Leads, Opportunities or Proposals in Deltek – How Microsoft and RSMGovCon can take your capture management to the next level

# RSM overview

Fifth largest audit, tax and consulting firm in the U.S.  
First Choice Advisor in the middle market



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# Presenters



**Bryan Koo, CPA**

Director

**Lead Architect for RSM GovCon, Microsoft Dynamics 365 practice**

20+ years of experience with ERP Systems

16 years of Government Contracting Industry Experience

Served as a member of the Microsoft Product Advisory Board



**Giacomo Apadula**

Principal

**RSM Consulting Lead for Government Contracting**

Giacomo has over 15 years experience supporting clients on complex government contracting cost accounting and regulatory compliance matters.



**Richard Langen**

Director

**Lead Solution Engineer for RSM GovCon, Microsoft Dynamics 365 practice**

25+ years of experience with ERP Systems

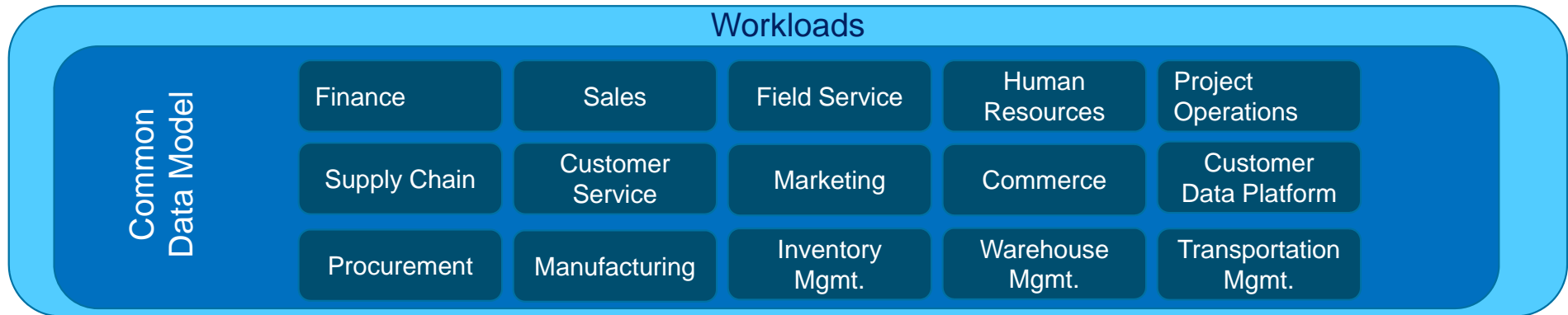
15+ years in industry and a former CIO

# Agenda

- What is Microsoft Dynamics 365 and how does RSM GovCon fit in?
- What is the compliance framework that should be considered when implementing a Government Contracting solution?
- Top 3 Reasons to choose Microsoft Dynamics 365 over Deltek

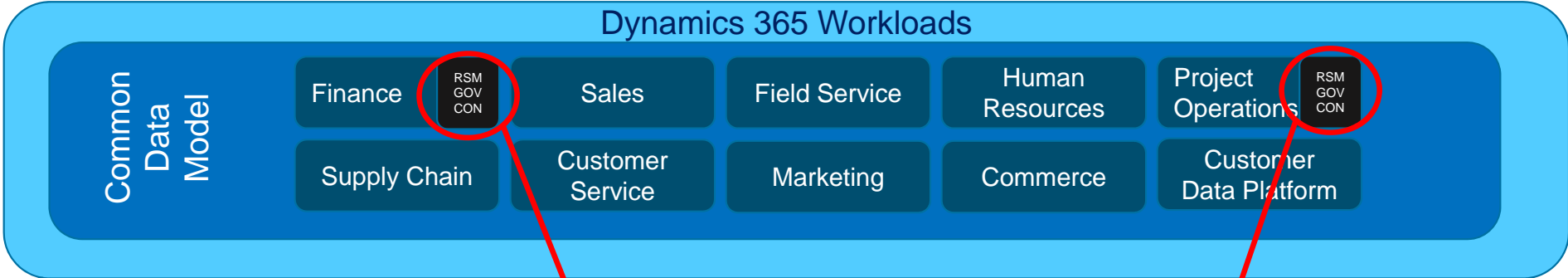
# WHAT IS MICROSOFT DYNAMICS 365 AND HOW DOES RSM GOVCON FIT IN?

# Microsoft Dynamics 365 Platform



<https://docs.microsoft.com/en-us/dynamics365>

# Microsoft Dynamics 365 Platform



RSM GovCon is embedded in Dynamics 365 workloads



# Microsoft Dynamics 365 Platform

## Dynamics 365 Workloads

Common  
Data  
Model

Finance

RSM  
GOV  
CON

Sales

Field Service

Human  
Resources

Project  
Operations

RSM  
GOV  
CON

Supply Chain

Customer  
Service

Marketing

Commerce

Customer  
Data Platform

## Dynamics 365 Artificial Intelligence Solutions

Finance Insights

Sales Insights

Customer  
Service Insights

Fraud Protection

Planning  
Optimization

Product Insights

Customer  
Insights

## Dynamics 365 Mixed Reality Solutions

Remote Assist

Product Visualize

D365 Guides

## Microsoft Platform

Microsoft Azure

Microsoft Power  
BI

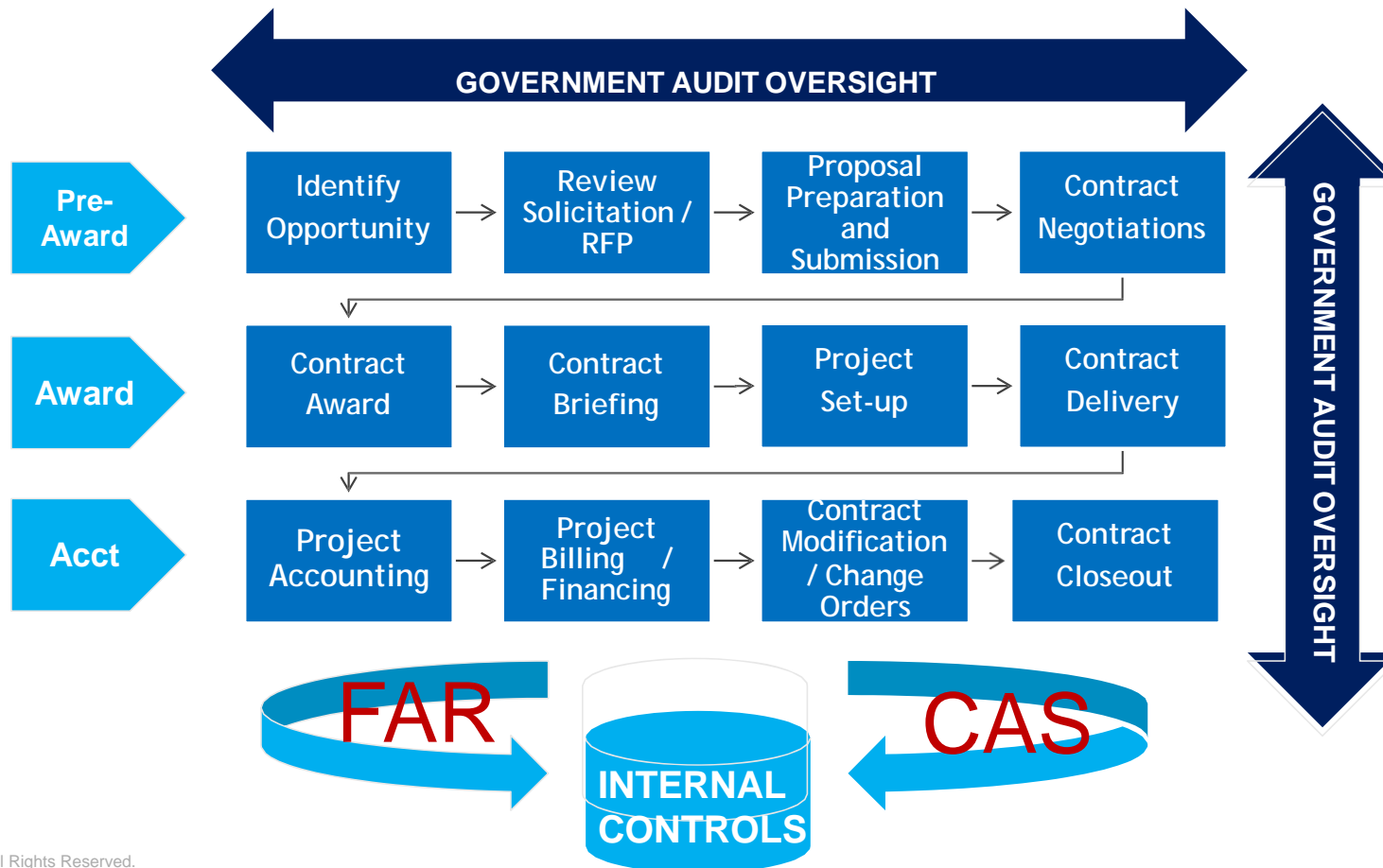
Microsoft Teams

Microsoft Power  
Platform

Microsoft Office

WHAT IS THE COMPLIANCE  
FRAMEWORK THAT SHOULD BE  
CONSIDERED WHEN  
IMPLEMENTING A GOVERNMENT  
CONTRACTING SOLUTION?

# Government Contracting Compliance Framework



# Government Contracting Compliance Framework

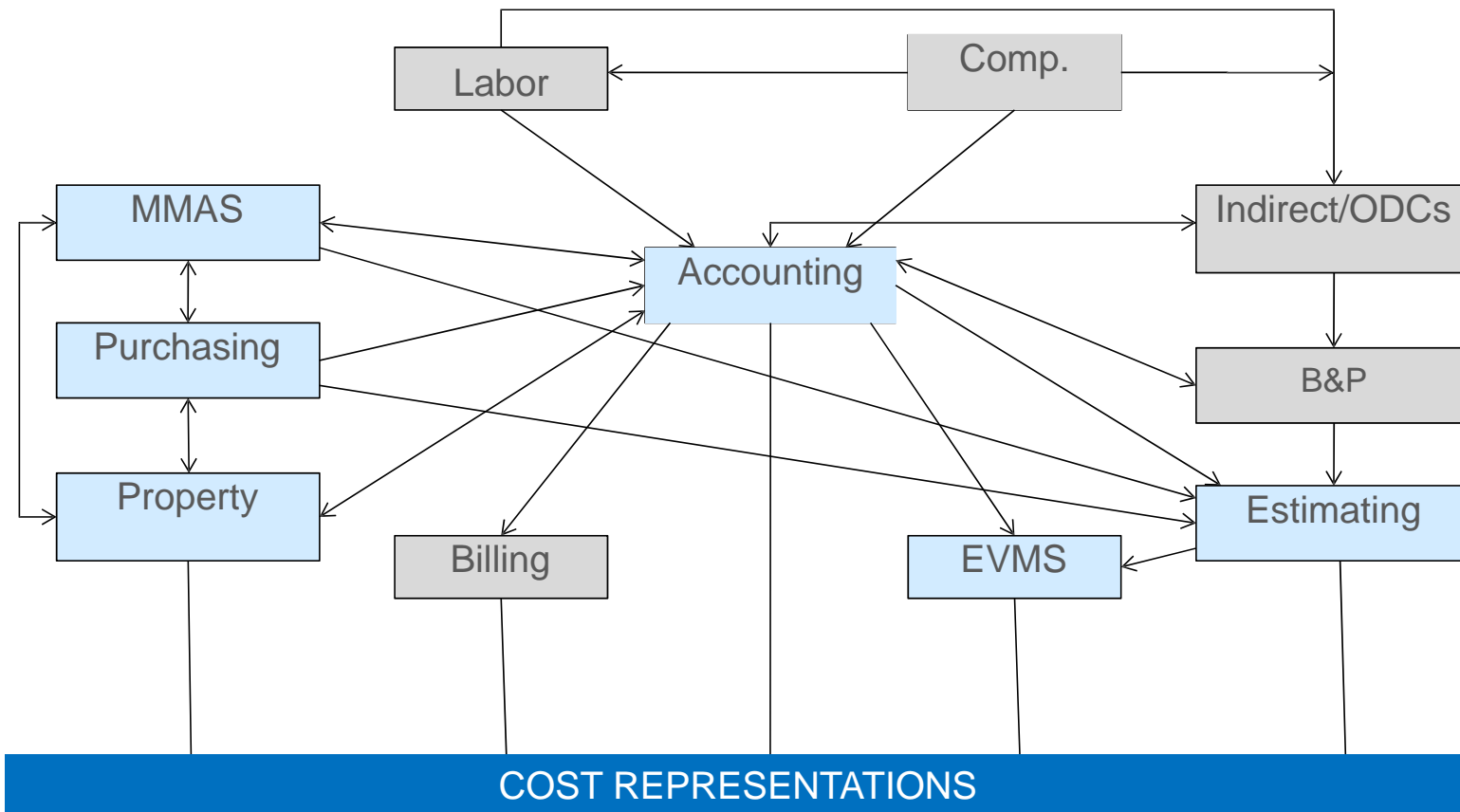
## Audits can occur within the entire contract lifecycle

- Proposal Audits (Pre and post award)
- Incurred Cost
- Labor Floor checks
- Business Systems
- Forward Pricing Rate
- Disclosure Statement/CAS Compliance
- Defective Pricing (TINA)
- 60+ audit programs in DCAA public directory

## Events that can trigger audits

- Inability to provide **document traceability**
- Project Cost ledgers DO NOT **reconcile** to GL
- **Allocations** are not **posted** to Contract or unavailable in standard report
- Inability to clearly demonstrate **labor distributions** based on actual time worked (e.g., total time account)
- Manual workflows or processes which lack adequate internal controls
- Inability to demonstrate identification & segregation of **unallowable costs**
- Billings issues (e.g., don't reconcile to contract costs)
- Lack of internal controls surrounding the firms business systems and/or lack of staff training on GovCon compliance requirements

# Government Contracting Compliance Framework



# TOP 3 REASONS TO CHOOSE MICROSOFT DYNAMICS 365 OVER DELTEK

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

**Empower organizations to be FAR and CAS compliant**

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

**Empower organizations to be FAR and CAS compliant**

2

***System flexibility to adapt to organizational needs***



# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

**Empower organizations to be FAR and CAS compliant**

2

***System flexibility to adapt to organizational needs***

3

**Microsoft technology built into D365**

# REASON #1

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

**Empower organizations to be FAR and CAS compliant**

- **Proper segregation of direct, indirect and unallowable costs**

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

## Empower organizations to be FAR and CAS compliant

- **Proper segregation of direct, indirect and unallowable costs**
  - Ability to design a flexible and best practice account structure
    - 5XXXXX = Direct Expenses
    - 6XXXXX = Fringe Costs
    - 7XXXXX = Overhead Costs
    - 8XXXXX = General and Administrative
    - 9XXXXX = Unallowable
  - Further segregate financial and project activities using flexible dimensions for both reporting and cost pool segregation
    - Example:
      - Your organization maintains 2 Overhead rates
        - Corporate Site
        - Client Site

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

**Empower organizations to be FAR and CAS compliant**

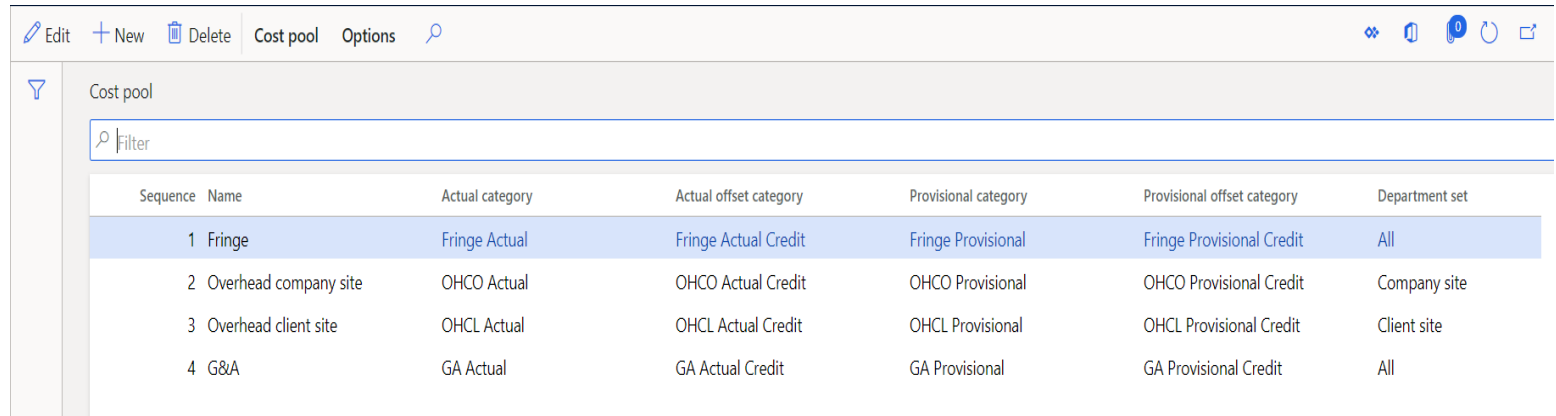
- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

## Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**
  - Actual
  - Target
  - Provisional



The screenshot shows the 'Cost pool' management interface in Microsoft Dynamics 365. At the top, there are navigation buttons: 'Edit', '+ New', 'Delete', 'Cost pool', and 'Options'. Below this is a search bar labeled 'Filter'. The main area contains a table with the following columns: 'Sequence', 'Name', 'Actual category', 'Actual offset category', 'Provisional category', 'Provisional offset category', and 'Department set'. The table lists four cost pools:

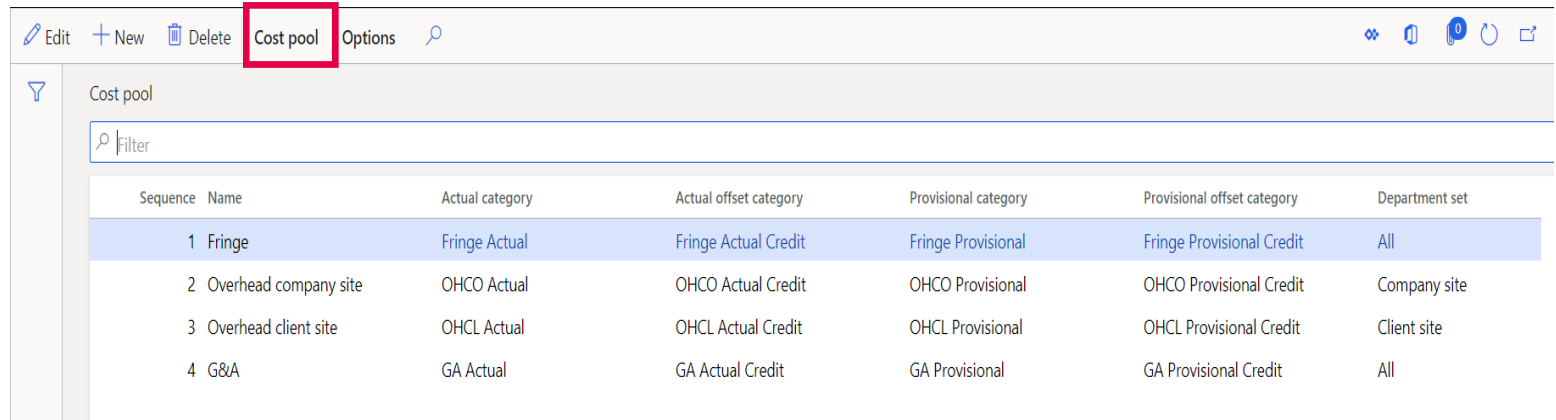
Sequence	Name	Actual category	Actual offset category	Provisional category	Provisional offset category	Department set
1	Fringe	Fringe Actual	Fringe Actual Credit	Fringe Provisional	Fringe Provisional Credit	All
2	Overhead company site	OHCO Actual	OHCO Actual Credit	OHCO Provisional	OHCO Provisional Credit	Company site
3	Overhead client site	OHCL Actual	OHCL Actual Credit	OHCL Provisional	OHCL Provisional Credit	Client site
4	G&A	GA Actual	GA Actual Credit	GA Provisional	GA Provisional Credit	All

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

## Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**
  - Actual
  - Target
  - Provisional



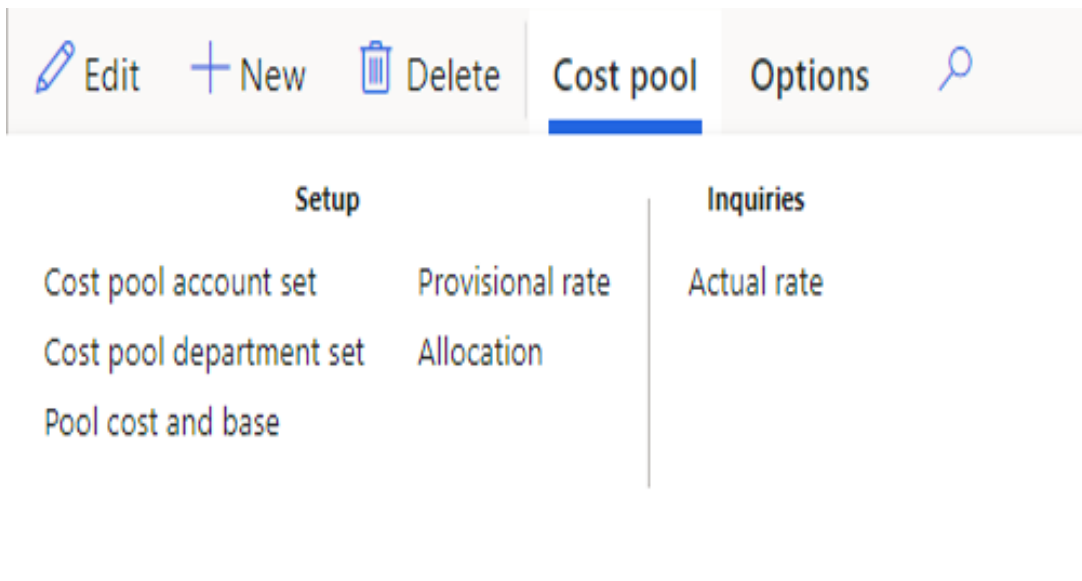
Sequence	Name	Actual category	Actual offset category	Provisional category	Provisional offset category	Department set
1	Fringe	Fringe Actual	Fringe Actual Credit	Fringe Provisional	Fringe Provisional Credit	All
2	Overhead company site	OHCO Actual	OHCO Actual Credit	OHCO Provisional	OHCO Provisional Credit	Company site
3	Overhead client site	OHCL Actual	OHCL Actual Credit	OHCL Provisional	OHCL Provisional Credit	Client site
4	G&A	GA Actual	GA Actual Credit	GA Provisional	GA Provisional Credit	All

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**



The image shows a screenshot of the Microsoft Dynamics 365 interface. At the top, there is a ribbon with the following options: Edit (pencil icon), New (+ icon), Delete (trash icon), Cost pool (selected, blue underline), and Options (magnifying glass icon). Below the ribbon is a table with two columns: Setup and Inquiries.

Setup		Inquiries
Cost pool account set	Provisional rate	Actual rate
Cost pool department set	Allocation	
Pool cost and base		

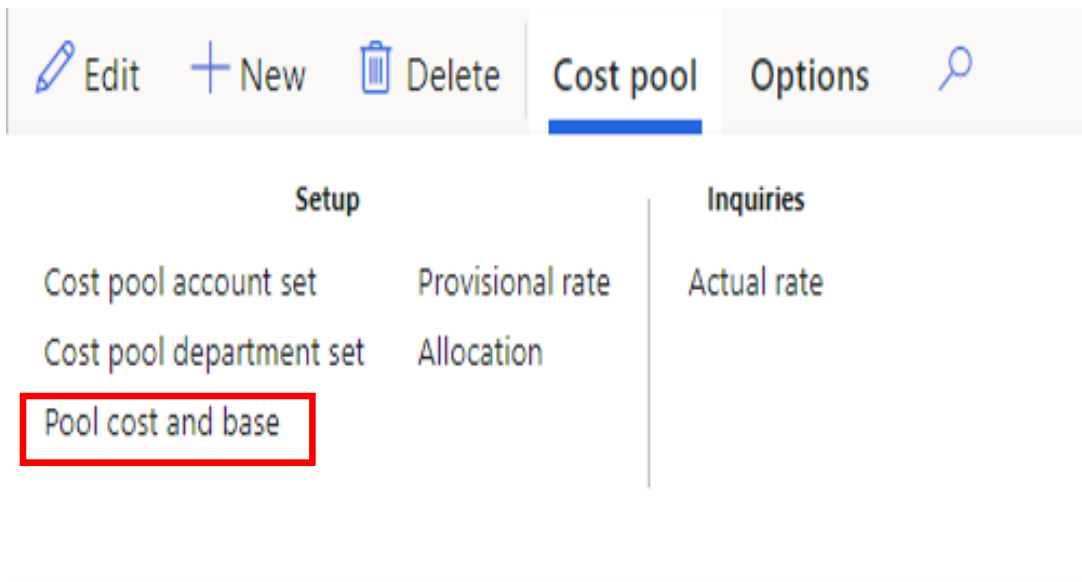


# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**

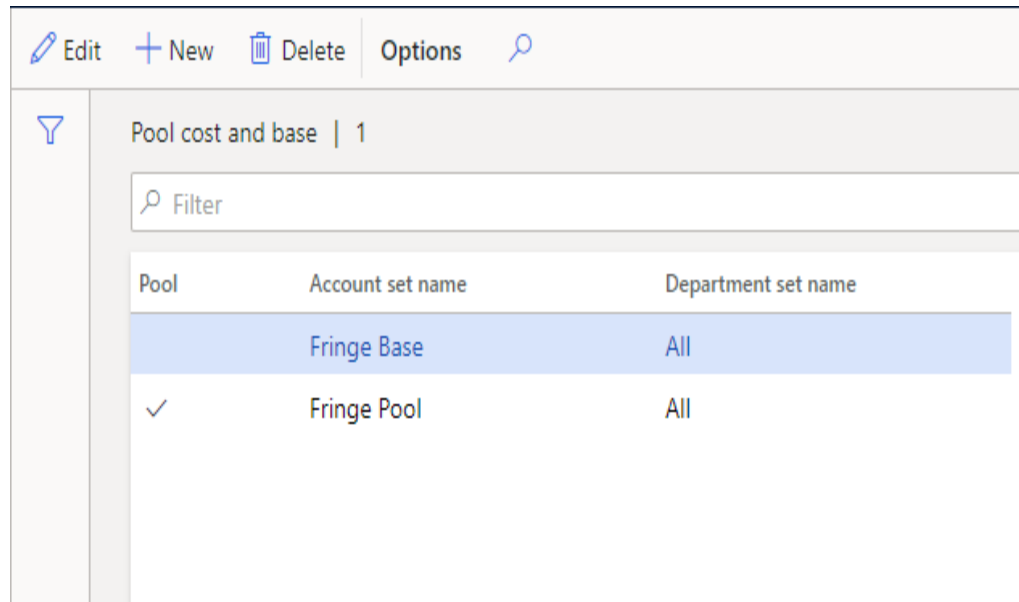


# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

## Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**



The screenshot displays the Microsoft Dynamics 365 interface for managing cost pools. At the top, there are navigation icons for Edit, New, Delete, and Options, along with a search icon. Below this is a filter icon and the text 'Pool cost and base | 1'. A search bar labeled 'Filter' is present. The main content is a table with three columns: 'Pool', 'Account set name', and 'Department set name'. The table contains two rows: one for 'Fringe Base' with 'All' in the department set name, and another for 'Fringe Pool' with 'All' in the department set name. A checkmark is visible in the 'Pool' column for the 'Fringe Pool' row.

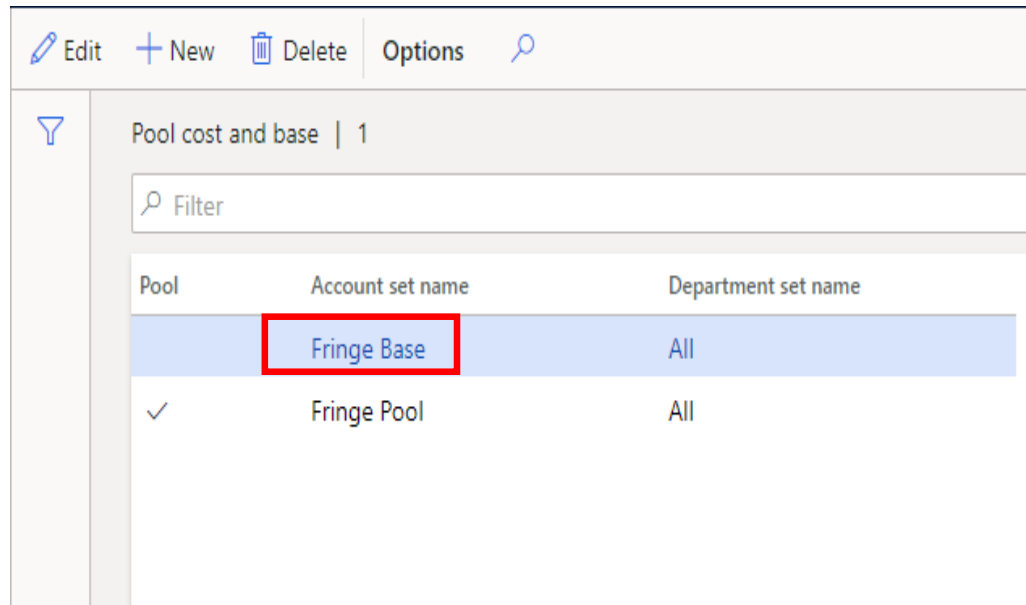
Pool	Account set name	Department set name
	Fringe Base	All
✓	Fringe Pool	All

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**



The screenshot shows a Microsoft Dynamics 365 interface for managing cost pools. At the top, there are action buttons: Edit (pencil icon), + New, Delete (trash icon), and Options (magnifying glass icon). Below the buttons, there is a filter section with a funnel icon and the text 'Pool cost and base | 1'. A search box labeled 'Filter' is present. The main content is a table with three columns: 'Pool', 'Account set name', and 'Department set name'. The first row is highlighted in blue and has a red box around the 'Fringe Base' value in the 'Account set name' column. The second row has a checkmark in the 'Pool' column, 'Fringe Pool' in the 'Account set name' column, and 'All' in the 'Department set name' column.

Pool	Account set name	Department set name
	Fringe Base	All
✓	Fringe Pool	All

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

## Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**

Cost pool account setup

Name	Description	Version	Valid from	Valid to
Fringe Base	Fringe base	1	1/1/2015	Never

**Lines**

[+ New](#) [Delete](#)

Line number	From account	To account
1	501110	501120
2	660005	660010
3	700005	700025

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

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## Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**

Cost pool account setup

Name	Description	Version	Valid from	Valid to
Fringe Pool	Fringe pool	1	1/1/2015	Never

**Lines**

[+ New](#) [Delete](#)

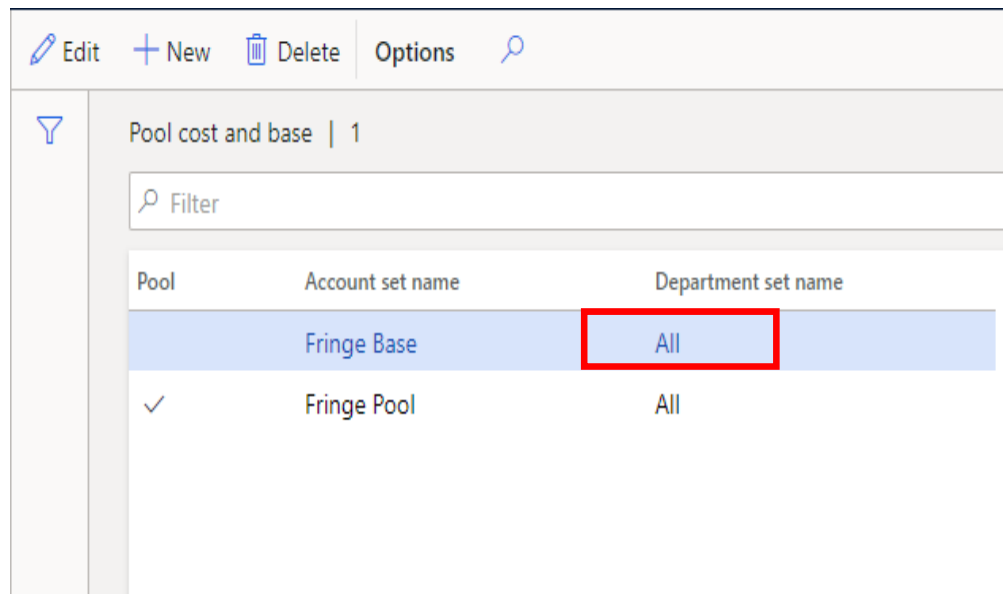
Line number	From account	To account
1	600010	600610

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**



Pool	Account set name	Department set name
	Fringe Base	All
✓	Fringe Pool	All

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

## Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**

Billing pool department setup

Name	Description	Version	Valid from	Valid to
All	All	0	1/1/2015	Never

Lines

[+ New](#) [Delete](#)

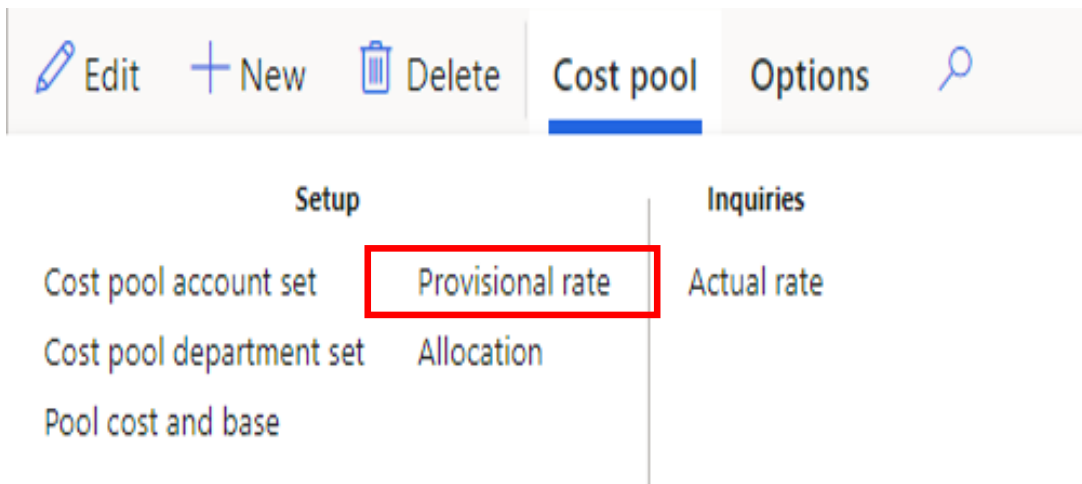
Line number	From department	To department
1	000_01	002_01

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**



The screenshot shows the 'Cost pool' management interface in Microsoft Dynamics 365. At the top, there is a ribbon with buttons for 'Edit', 'New', 'Delete', 'Cost pool', and 'Options'. Below the ribbon, the interface is divided into two columns: 'Setup' and 'Inquiries'. Under 'Setup', there are three rows: 'Cost pool account set', 'Cost pool department set', and 'Pool cost and base'. Under 'Inquiries', there are two rows: 'Provisional rate' and 'Actual rate'. The 'Provisional rate' cell is highlighted with a red border.

Setup		Inquiries
Cost pool account set	Provisional rate	Actual rate
Cost pool department set	Allocation	
Pool cost and base		

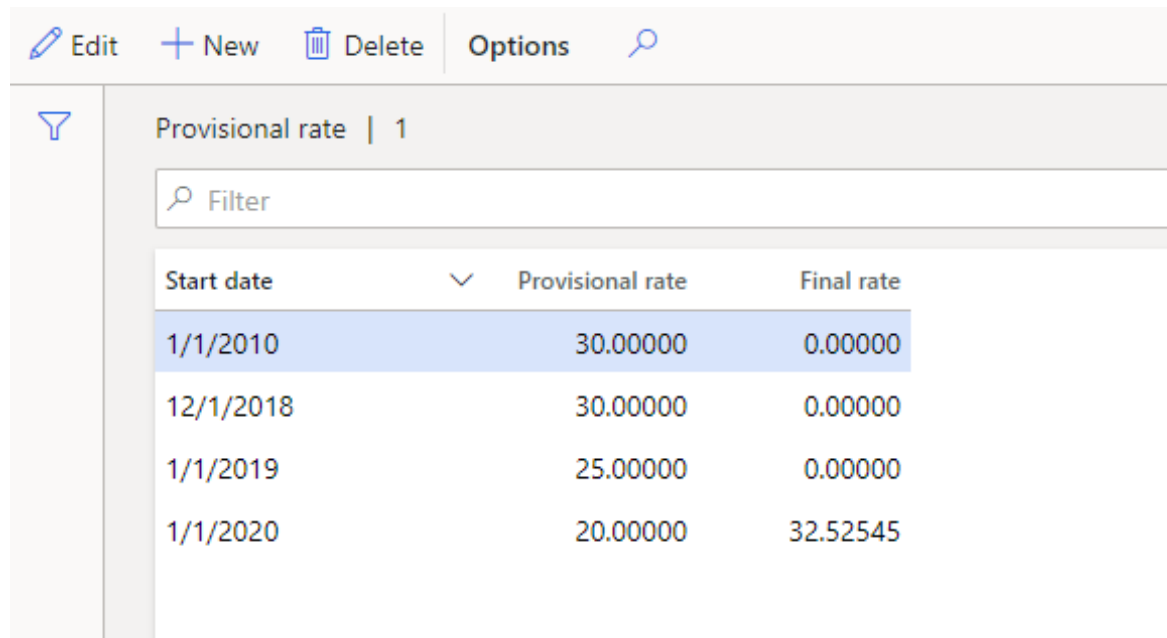


# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

## Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- **Manage unlimited cost pools**



The screenshot displays a Microsoft Dynamics 365 interface for managing provisional rates. At the top, there are action buttons: Edit (pencil icon), New (+ icon), Delete (trash icon), and Options (magnifying glass icon). Below these is a filter icon and the text 'Provisional rate | 1'. A search bar labeled 'Filter' is present. The main data area is a table with the following columns: Start date, Provisional rate, and Final rate. The first row is highlighted in blue.

Start date	Provisional rate	Final rate
1/1/2010	30.00000	0.00000
12/1/2018	30.00000	0.00000
1/1/2019	25.00000	0.00000
1/1/2020	20.00000	32.52545

Client: CUST000007  
 Contract Number: PCT0000000  
 Project: PROJ000000228 DOT IT Infrastructure Project  
 Task:  
 Period Of Performance: 1/1/2020 ..

Name		Prior Years	Current Period		Year To Date	
			Actual	Budgeted	Actual	Budgeted
Revenue.		0.00	126,141.78	250,000.00	126,141.78	250,000.00
Labor						
Labor Hourly		0.00	40,000.00	100,000.00	40,000.00	100,000.00
Labor Salary		0.00	10,000.00	50,000.00	10,000.00	50,000.00
Total Labor		0.00	50,000.00	150,000.00	50,000.00	150,000.00
Expense						
Subcontractors		0.00	12,500.00	50,000.00	12,500.00	50,000.00
Travel - Airfare		0.00	5,000.00	25,000.00	5,000.00	25,000.00
Travel - Lodging		0.00	2,600.00	15,000.00	2,600.00	15,000.00
Travel - Meals and Entertain		0.00	1,200.00	10,000.00	1,200.00	10,000.00
Unallowable ODC		0.00	1,000.00	0.00	1,000.00	0.00
Total Expense		0.00	22,300.00	100,000.00	22,300.00	100,000.00
Burden						
Fringe Provisional	30.00	0.00	15,000.00	0.00	15,000.00	0.00
Overhead Company Site Provisional	40.00	0.00	5,200.00	0.00	5,200.00	0.00
Overhead Client Site Provisional	29.00	0.00	15,080.00	0.00	15,080.00	0.00
GA Provisional	16.00	0.00	17,212.80	0.00	17,212.80	0.00
Total Burden		0.00	52,492.80	0.00	52,492.80	0.00
Total Cost		0.00	124,792.80	250,000.00	124,792.80	250,000.00
Profit		0.00	1,348.98	0.00	1,348.98	0.00

Client: CUST000007  
 Contract Number: PCT0000000  
 Project: PROJ000000228 DOT IT Infrastructure Project  
 Task:  
 Period Of Performance: 1/1/2020 ..

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			Actual	Budgeted	Actual	Budgeted
Revenue.		0.00	126,141.78	250,000.00	126,141.78	250,000.00
Labor						
Labor Hourly		0.00	40,000.00	100,000.00	40,000.00	100,000.00
Labor Salary		0.00	10,000.00	50,000.00	10,000.00	50,000.00
Total Labor		0.00	50,000.00	150,000.00	50,000.00	150,000.00
Expense						
Subcontractors		0.00	12,500.00	50,000.00	12,500.00	50,000.00
Travel - Airfare		0.00	5,000.00	25,000.00	5,000.00	25,000.00
Travel - Lodging		0.00	2,600.00	15,000.00	2,600.00	15,000.00
Travel - Meals and Entertain		0.00	1,200.00	10,000.00	1,200.00	10,000.00
Unallowable ODC		0.00	1,000.00	0.00	1,000.00	0.00
Total Expense		0.00	22,300.00	100,000.00	22,300.00	100,000.00
Burden						
Fringe actual					17.92	0.00
Overhead Company Site Actual					46.81	0.00
Overhead Client Site Actual					28.21	0.00
GA Actual					14.78	0.00
Total Burden		0.00	42,583.03	0.00	42,583.03	0.00
Total Cost		0.00	114,883.03	250,000.00	114,883.03	250,000.00
Profit		0.00	11,258.75	0.00	11,258.75	0.00

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Burden						
Fringe Provisional	30.00	0.00	15,000.00	0.00	15,000.00	0.00
Overhead Company Site Provisional	40.00	0.00	5,200.00	0.00	5,200.00	0.00
Overhead Client Site Provisional	29.00	0.00	15,080.00	0.00	15,080.00	0.00
GA Provisional	16.00	0.00	17,212.80	0.00	17,212.80	0.00
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Total Cost		0.00	124,792.80	250,000.00	124,792.80	250,000.00
Unallowable ODC		0.00	1,000.00	0.00	1,000.00	0.00
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Burden						
Fringe Provisional	30.00	0.00	15,000.00	0.00	15,000.00	0.00
Overhead Company Site Provisional	40.00	0.00	5,200.00	0.00	5,200.00	0.00
Overhead Client Site Provisional	29.00	0.00	15,080.00	0.00	15,080.00	0.00
GA Provisional	16.00	0.00	17,212.80	0.00	17,212.80	0.00
Total Burden		0.00	52,492.80	0.00	52,492.80	0.00
Total Cost		0.00	124,792.80	250,000.00	124,792.80	250,000.00
Profit		0.00	1,348.98	0.00	1,348.98	0.00

Client: CUST000007  
 Contract Number: PCT0000000  
 Project: PROJ000000228 DOT IT Infrastructure Project  
 Task:  
 Period Of Performance: 1/1/2020 ..

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			Actual	Budgeted	Actual	Budgeted
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Labor						
Labor Hourly		0.00	40,000.00	100,000.00	40,000.00	100,000.00
Burden						
Fringe actual	17.92	0.00	8,959.90	0.00	8,959.90	0.00
Overhead Company Site Actual	46.81	0.00	5,519.59	0.00	5,519.59	0.00
Overhead Client Site Actual	28.21	0.00	13,306.71	0.00	13,306.71	0.00
GA Actual	14.78	0.00	14,796.83	0.00	14,796.83	0.00
Total Burden		0.00	42,583.03	0.00	42,583.03	0.00
Total Cost		0.00	114,883.03	250,000.00	114,883.03	250,000.00
Unallowable ODC		0.00	1,000.00	0.00	1,000.00	0.00
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GA Actual	14.78	0.00	14,796.83	0.00	14,796.83	0.00
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# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

**Empower organizations to be FAR and CAS compliant**

- Proper segregation of direct, indirect and unallowable costs
- Manage unlimited cost pools
- **Manage various project types**

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

## Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- Manage unlimited cost pools
- **Manage various project types**
  - Time and Materials (flexible bill rates based on labor categories)
  - Various Cost Plus type contracts
  - Firm Fixed Priced
  - Hybrid projects

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

## Empower organizations to be FAR and CAS compliant

- Proper segregation of direct, indirect and unallowable costs
- Manage unlimited cost pools
- **Manage various project types**
  - Enforce billings ceilings at the project, task, account, resource levels
  - Set resource labor cost maximums

# REASON #2

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

**Empower organizations to be FAR and CAS compliant**

2

***System flexibility to adapt to organizational needs***



# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

**Empower organizations to be FAR and CAS compliant**

2

***System flexibility to adapt to organizational needs***

- **Enhanced system security based on organizational requirements**
  - Security controls can go to the field and data level
    - Deltek provides screen level security only

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

2

*System flexibility to adapt to organizational needs*

- Enhanced system security based on organizational requirements
- **Flexible user and role based menus and screens**
  - Tailor menu based on user roles
  - Ability to rename/hide and include various fields
    - Deltek screen modifications limited

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

2

*System flexibility to adapt to organizational needs*

- Enhanced system security based on organizational requirements
- Flexible user and role based menus and screens
- **Flexible audit trail capabilities**
  - Store incremental changes made to any data element
    - Before and after
    - Time/date and user stamp

Deltek does not track incremental changes to records

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

2

*System flexibility to adapt to organizational needs*

- Enhanced system security based on organizational requirements
- Flexible user and role based menus and screens
- Flexible audit trail capabilities
- **International support**
  - Language
  - Reporting

Delttek does not support multiple languages

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

2

*System flexibility to adapt to organizational needs*

- Enhanced system security based on organizational requirements
- Flexible user and role based menus and screens
- Flexible audit trail capabilities
- International support
- **Flexible user definable billing and revenue methods**

Billing formula

Billing form...	Description	Labor	Non-labor	Burden on	Fee
CNF	Cost no burden no fee	Cost	Cost	None	None
CPFF	Cost plus fixed fee	Cost	Cost	Both	Both
CPFH	Cost plus fee on hours	Cost	Cost	Both	Amount on hours
FFP	FFP with ODC Pass Thru	None	Cost	None	None
FFP02	FFP no Pass Thru	None	None	None	None
TM	Time and materials	Sales price	Cost	None	None
TM02	Pass Thru	None	Cost	None	None
TMGA	Time and material - GA	Sales price	Cost	Non-labor	None

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

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- Enhanced system security based on organizational requirements
- Flexible user and role based menus and screens
- Flexible audit trail capabilities
- International support
- **Flexible user definable billing and revenue methods**

Billing pool group		
Pool ID	Name	Sets up equal cost pool
Company	Company wide fringe overhead ...	✓
DoD	DoD Negotiated	
G&A	G&A Only	✓
G&A1	G&A on Labor Travel Indirect	✓
TM1	T&M G&A on Travel Only	✓
TM2	T&M no Indirect	✓

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

Empower organizations to be FAR and CAS compliant

2

*System flexibility to adapt to organizational needs*

- Enhanced system security based on organizational requirements
- Flexible user and role based menus and screens
- Flexible audit trail capabilities
- International support
- **Flexible user definable billing and revenue methods**
  - Deltek has pre-defined revenue rules – revenue methods not pre-loaded must be customized and developed by Deltek

# REASON #3



# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

1

**Empower organizations to be FAR and CAS compliant**

2

***System flexibility to adapt to organizational needs***

3

**Microsoft technology built into D365**

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

3

## Microsoft technology built into D365

- Tight integration with Microsoft Office tools

The screenshot displays the Microsoft Excel interface with a 'General Ledger Journal Entry' spreadsheet. The spreadsheet includes a summary table and a detailed journal entry table. The summary table shows a Debit of 5000 and a Credit of 5000. The detailed table lists a date of 2020-12-11, company 'usmf', account type 'Ledger', main account '110110', description 'USD', currency 'USD', and a credit amount of 5000. A 'Do not change' warning is visible in the bottom right of the table. On the right side, the Microsoft Dynamics Data Connector sidebar is open, showing the user 'Richard Langen'.

Journal totals		Debit	Credit
		5000	5000

Date	Company	Account type	Non-ledger account	Main account	Description	Currency	Debit	Credit	Offset company	Offset account type	Offset Non-ledger	Offset main acc	Line number
2020-12-11	usmf	Ledger		110110	USD	USD	5000		0	DEMP	Ledger	110130	

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

3

## Microsoft technology built into D365

- Tight integration with Microsoft Office tools
- Full web-based interface for ease of access

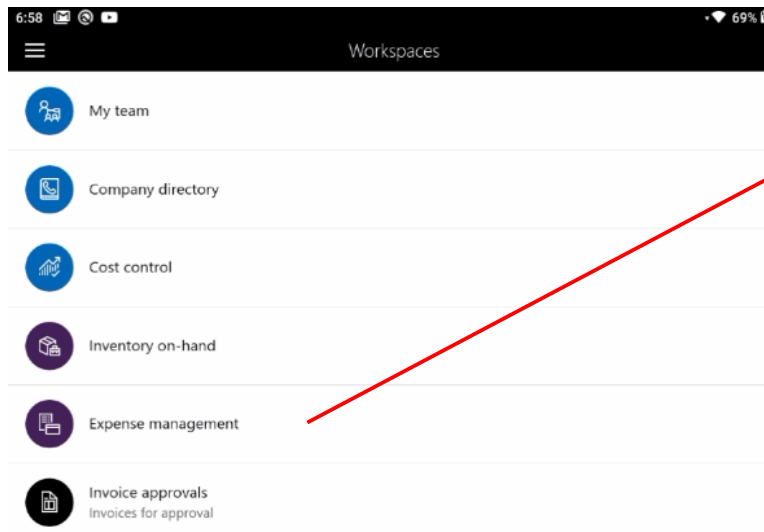
The screenshot displays the Microsoft Dynamics 365 Finance and Operations dashboard. The browser address bar shows the URL: <https://rsmicrosoft365-ls2aos.sandbox.ax.dynamics.com/?cmp=USSl&mi=DefaultDashboard>. The dashboard header includes the text "Finance and Operations" and a search bar labeled "Search for a page". The main content area features the RSM logo and a grid of functional tiles: Project management, Channel deployment, Feature management, Employee self service, Compensation management, Financial insights, Bank management, Cost accounting ledger administration, Financial period close, Benefits, Cost administration, and Fixed asset management. On the left side, there is a navigation pane with icons for home, favorites, and a calendar for December 2020, with the 14th highlighted. Below the calendar, it says "Work items assigned to me".

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

3

## Microsoft technology built into D365

- Tight integration with Microsoft Office tools
- Full web-based interface for ease of access
- Mobile applications for remote entry on any device



A screenshot of the "Enter an expense" mobile form. The top bar shows the time as 6:54 and battery level at 68%. The form fields are: "Expense category" (dropdown menu with "Car Rental" selected), "Transaction date" (text field with "12/14/2020"), "Payment method" (dropdown menu with "PCreditCar" selected), "Merchant" (text field with "National"), "Transaction amount" (text field with "157.89"), and "Currency" (dropdown menu with "USD" selected). At the bottom, there are two buttons: "Choose image" and "Take photo".

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

3

## Microsoft technology built into D365

- Tight integration with Microsoft Office tools
- Full web-based interface for ease of access
- Mobile applications for remote entry on any device
- PowerApps and Power Automate to build workflows and applications

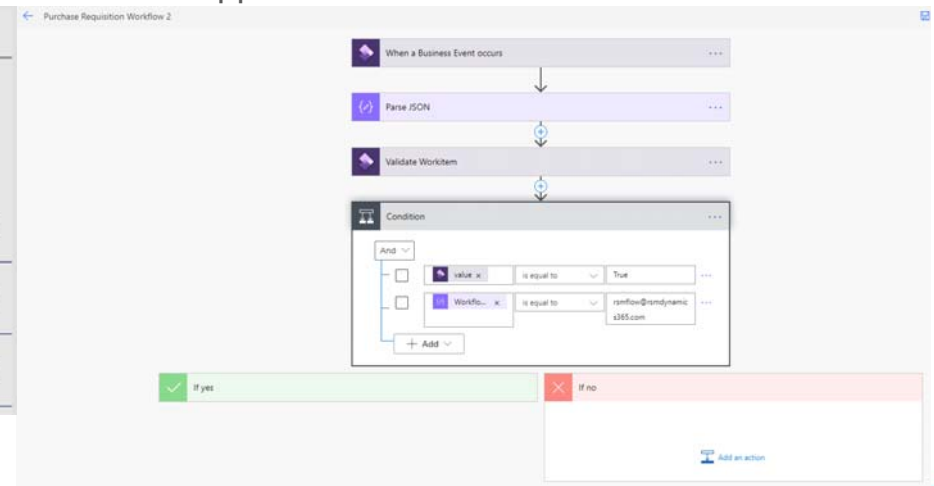
WEEKLY TIMESHEET

Week: 12/14/2020 to 12/20/2020

Employee: Richard Langen

**SUBMIT FOR APPROVAL**

Bill To	14 Mon	15 Tues	16 Wed	17 Thurs	18 Fri	19 Sat	20 Sun	Comments
	0	0	0	0	0	0	0	
	0	0	0	0	0	0	0	
	0	0	0	0	0	0	0	



# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

3

## Microsoft technology built into D365

- Tight integration with Microsoft Office tools
- Full web-based interface for ease of access
- Mobile applications for remote entry on any device
- PowerApps and Power Automate to build workflows and applications
- Project Management including Work Break Down Structures and Resource Management

The screenshot displays the Microsoft Dynamics 365 interface, divided into two main sections: a project schedule table on the left and a resource availability grid on the right.

**Project Schedule Table:**

WBS ID	Task name	Effort in hours	Task start date	Task end date	Duration	Staffing status	Unstaffed...
00000281	Phil Advancing Basic Ed	2,000.00	1/1/2020	2/4/2020	25.00	Not staffed	2,000.00
1	Phil Advancing Basic Ed	2,000.00	1/1/2020	2/4/2020	25.00	Not staffed	2,000.00
1.1	Phil Advancing Basic Ed	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.1.1	Gen Ops Reporting	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2	Assessments Eval	1,800.00	1/1/2020	2/4/2020	25.00	Not staffed	1,800.00
1.2.1	Pre-Serv Teach Trng	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.2	In-Serv Teach Trng	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.3	TLMs	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.4	Sys Strengthening	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.5	Priv Sector Engmt	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.6	Parents Comm Engmt	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.7	Grants to Orgs	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.8	Other	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00
1.2.9	ABC COVID	200.00	1/1/2020	2/4/2020	25.00	Not staffed	200.00

**Resource Availability Grid:**

The grid shows resource availability for three individuals: Aaron Con, Adam Carter, and Adriana Giorgi. The columns represent time periods from 12/13/2020 to 1/24/2021. All resources are currently available for 40.00 hours in each period.

RESOURCES	12/13/2020-12/19/2020	12/20/2020-12/26/2020	12/27/2020-1/2/2021	1/3/2021-1/9/2021	1/10/2021-1/16/2021	1/17/2021-1/23/2021	1/24/2021-1/30/2021
Aaron Con (000409 - user)	Available 40.00	Available 40.00	Available 40.00	Available 40.00	Available 40.00	Available 40.00	Available 40.00
Adam Carter (000402 - user)	Available 40.00	Available 40.00	Available 40.00	Available 40.00	Available 40.00	Available 40.00	Available 40.00
Adriana Giorgi (000405 - user)	Available 40.00	Available 40.00	Available 40.00	Available 40.00	Available 40.00	Available 40.00	Available 40.00

# 3 Reasons Why Microsoft Dynamics 365 with RSM GovCon

3

## Microsoft technology built into D365

- Tight integration with Microsoft Office tools
- Full web-based interface for ease of access
- Mobile applications for remote entry on any device
- PowerApps and Power Automate to build workflows and applications
- Project Management including Work Break Down Structures and Resource Management
- Transaction Drill Down (Around) to details

CUSTOMER	RESPONSIBLE
Project contract ID 00000154	Sales manager
Account US_SI_0100	
Email	

Form information

Personalize: Project contract ID

View shortcuts

View details

# THE POWER OF THE MICROSOFT DYNAMICS 365 PLATFORM

Product Demonstration



# QUESTIONS FROM ATTENDEES?

## Future Webinars in the RSM GovCon Webinar Series

- **March 2021** – How to break up with Deltek – Provisional to Final rate calculation with a new system – Microsoft and RSM GovCon
- **May 2021** – How will Microsoft and RSM GovCon help you handle a DCAA audit?
- **July 2021** – Your Project Operations team is limited by Deltek. What can you do about it?
- **September 2021** – Advanced Microsoft Platform Features all Deltek Users are missing
- **November 2021** – You won't find Leads, Opportunities or Proposals in Deltek – How Microsoft and RSMGovCon can take your capture management to the next level