



# **UNANET AE: ADMINISTERING THE SYSTEM**

## **PARTICIPANT GUIDE**

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## ABOUT THIS PARTICIPANT GUIDE

This document serves as a supplement to the training courses offered through Unanet University. Participants should use this workbook to complete exercises in the student Unanet system while attending the course. Additionally, participants should record notes and actions for reference when working within their own Unanet AE system.

### Symbols used in this guide



Activity



Important Note



Demo



Question



Tour

### Unanet Contact Information

- [VirtualUU@unanet.com](mailto:VirtualUU@unanet.com)

Send questions here for information about courses, course schedule, [unanetuniversity.com](http://unanetuniversity.com), certifications, and enrollments. This is a mailbox that is monitored daily.

### Support Portal

To improve your experience in accessing our support resources, all Knowledge Center articles, and FAQs have been relocated to the Unanet Support Portal, located at [support.unanet.com](http://support.unanet.com). You will need a Support ID to access the portal, which you can acquire using the steps below:

To obtain a login to the Unanet support portal or to create a new ticket, send an email to [support@unanet.com](mailto:support@unanet.com) with "Support Portal ID request" in the Subject line.

The following conditions must be met to be granted a support account:

- The "from" address must match the domain of your company.
- It must NOT be a generic email account (e.g., it cannot be from [gmail.com](http://gmail.com), [aol.com](http://aol.com), or [msn.com](http://msn.com)).

The company must have an active support agreement with Unanet.

## Student Training Site

A Unanet AE training system has been specifically created to support this course. The system is configured around a fictional Unanet AE company named Casco & Wilson, Inc. The activities, and accompanying simulations, reference Casco & Wilson, Inc, its related internal and external organizations, and business processes.



# COURSE INTRODUCTION

In this course, you will review tasks specific to general administration of the system such as creating and modifying permissions, time, expenses, benefits, projects, reports, and dashboards.

## Learning Objectives

After this session of **Unanet AE: Administering the System**, participants will be able to:

- Explain how to set up system-wide permissions.
- Explain how to set up various components of Time and Expense.
- Recall how to manage benefits.
- Explain how to set up various components of Project Administration.
- Summarize how to assign Project Management permissions and access.
- Explain how to set up reporting.
- Recall the steps to create various reports.
- Summarize how to create and manage Dashboards.
- Summarize how to create and manage Analytic Dashboards.
- Recall methods to customize the user interface.

# LESSON 1: MANAGING SYSTEM-WIDE PERMISSIONS

## Learning Objectives

Explain how to set up system-wide permissions.

- Summarize how to set up User and Group permissions.
- Recall how to manage passwords.
- Explain how to assign Document Manager permissions.
- Explain how to assign Navigator Query permissions.

## User and Group Permissions

Permissions can be assigned to users and/or groups. Groups usually are established based on common departmental requirements. For example, the user may establish an Accounts Receivable group and assign all personnel who perform client billing to that group. When doing so, assign least common denominator rights to that group, since one member of the group is likely a manager and will receive more rights. A user can belong to multiple groups and has all the combined rights. If someone in the Accounts Receivable group requires additional access, assign the user to another group.

User permissions are assigned per applet. Applets are the subcategories within a module. Each applet has four basic rights.

- View: Gives users permission to view records.
- Edit: Gives users permission to modify records.
- Add: Gives users permission to add records.
- Delete: Gives users permission to delete records.

If no right is selected, the applet does not appear on the Main Menu for that user. Likewise, if no applets are viewable within a given module, that module will not appear in the Main Menu for that user. Some applets have special rights in addition to the four basic rights. The permission name is indicative of what it controls.

Permissions in Unanet AE define both access and reporting permissions for users.

Permission	Description
<b>User</b>	Defines the applets a user has access to and any related special rights.
<b>Reporting</b>	Specifies the reports a user can run and the project, cost, and sensitive data those reports can include.
<b>Feature</b>	Defines access to other areas, such as Documents and Navigator Queries.

Permission Groups are created and managed in Administration > Permissions. Best practice is to set permissions at a group level first. Then, add additional user permissions, as necessary.



### Activity 1.1 – Set Up User and Group Permissions

In this activity, you will create a new user and set user permissions. In addition, you will create a new group, assign permissions to the group, and assign a member to the group.

#### Activity Steps

##### Part 1: Create a New User

1. Navigate to **Human Resources > Employees**. The **Employees** applet opens.
2. Type *CBA01* in the **Code** field.
3. Type *Corey* in the **First** field.
4. Type *B* in the **Middle** field.
5. Type *Adams* in the **Last** field.
6. Select **Weekly** from the **Timesheet Group** drop-down list.
7. Select the **wand** icon in the **InFocus Username** field to generate a username for the employee. **Note:** By default, the username format is first initial, last name.
8. Type *[Today's date]* in the **Hire Date** field.
9. Select the **Save** button.

##### Part 2: Assign Permissions

1. Select **Project Accountant** for the **Job Type** drop-down list. **Note:** By default, a **Project Accountant** has access to all projects when reporting, planning, and billing.
2. Select **Accounting** from the **Dashboard Group** drop-down list.
3. Select the **Accounting/Rates** tab.
4. Select **Lookup** in the **Default Approver** field. The **Employee Lookup** window opens.

5. Double-click **Casco, Lewis J.**
6. Select the following check boxes in the **Rate Options** section:
  - **Can View Pay Rate**
  - **Can View Pay Rate In Summary**
  - **Can View Job Cost Rate**
  - **Can View Job Cost In Summary**
7. Select the **Save** button.
8. Close the **Employees** applet.

### **Part 3: Assign Group Permissions to Employee**

1. Navigate to **Administration > Permissions**. The **Permissions** applet opens.
2. Select the **lock** icon for the **cadams** under the **Users tab** to assign Permissions. The **InFocus Permissions for cadams** window opens.
3. Select the **Member Of** tab.
4. Select the **General Employee** check box.
5. Select the **Project Accountant** check box.
6. Select the **Save** button.

### **Part 4: Create a New Group**

1. Select the **Groups** tab.
2. Type *Accounts Receivable* in the **Enter New Line** field.
3. Select the **Save** button.

### **Part 5: Assign Permissions**

1. Select the **lock** icon for the newly created **Accounts Receivable** group to add permissions. The **Permissions for Accounts Receivable** window opens.
2. Select the **Group Permissions** tab.
3. Select the **+/-** icon to collapse the tree. The permissions are based on the modules and corresponding applets in Unanet AE.
4. Select **All** from the **Set** drop-down list.
5. Select **Accounts Receivable** from the **For** drop-down list.
6. Select the **To** check box.
7. Select the **Go** button. All the permissions for **Accounts Receivable** are assigned to the group. **Note:** The only permissions that are not updated are **Special Permissions** for that module.

### **Part 6: Assign Members to a Group**

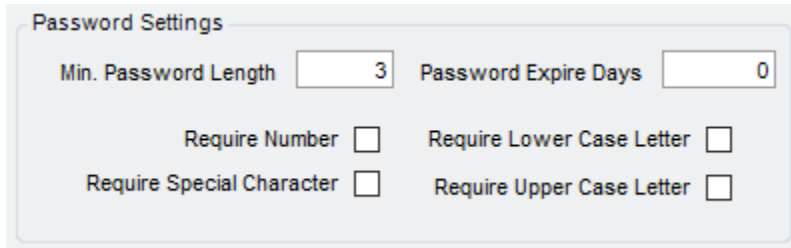
1. Select the **Members** tab. Here you can add individual users to the group permission.
2. Select the **Is Member** check box for **cadams**. **Note:** An individual can be a member of more than one group.
3. Select the **Save** button.
4. Close the **Permissions** applet.

## Password Management

From an administrative perspective, passwords are managed via the Administration module.

### Password Settings

It is important for a company to establish a global company policy for passwords. This includes requirements regarding strength and expiration. Password Settings are set via Permissions > Global Settings.



The screenshot shows a 'Password Settings' configuration window. It contains two input fields: 'Min. Password Length' with the value '3' and 'Password Expire Days' with the value '0'. Below these are four checkboxes: 'Require Number', 'Require Lower Case Letter', 'Require Special Character', and 'Require Upper Case Letter', all of which are currently unchecked.

The following table provides a description of the password options.

Option	Description
<b>Min Password Length</b>	Minimum number of characters required for a valid password.
<b>Password Expire Days</b>	If a number is entered, all passwords will expire if the specified number of days have passed since the last time the password was changed by the user.
<b>Require Number</b>	Requires the use of a number in a password when it is created.
<b>Require Special Character</b>	Requires the use of a special character (@, *, ^ etc.) in a password when it is created.
<b>Require Lower Case Letter</b>	Requires the use of a lower case letter in a password when it is created.
<b>Require Upper Case Letter</b>	Requires the use of an upper case letter in a password when it is created.

## Password Updates and Resets

Once you have a password policy in place, you can manage passwords via Administration > Permissions. Administrators can update passwords and require a password reset when a user next logs in.



### Activity 1.2 – Manage Passwords

In this activity, you will change a password for a user and require the user to reset their password with their next login.

#### Activity Steps

1. Navigate to **Administration > Permissions**. The **Permissions** applet opens.
2. Select the **lock** icon for **cadams** to create a password under the **Users** tab. The **InFocus Permissions for cadams** window opens.
3. Type *Welcome1* in the **New Password** field.
4. Type *Welcome1* in the **Confirm Password** field.
5. Select the **Change Password** button. The **Save Successful** window opens.
6. Select the **OK** button.
7. Select the **Save** button.
8. Select the **Require Reset** check box for **cadams**. The user will be required to reset their password the next time they login.
9. Select the **Save** button.
10. Close the **Permissions** applet.

## Document Manager Permissions

Access Permissions for working with Document Manager is assigned in Administration > Permissions. Use the special rights options to provide access to view the specified reports.



### Activity 1.3 – Assign Document Manager Applet Permissions

In this activity, you will set permissions for working with Document Manager.

#### Activity Steps

1. Navigate to **Administration > Permissions**. The **Permissions** applet opens.
2. Select the **Groups** tab.
3. Select the **lock** icon for the **Accounts Receivable** group to add permissions. The **Permissions for Accounts Receivable** window opens.
4. Select the **Group Permissions** tab.
5. Select the **+/-** icon to collapse the tree.
6. Select the **+** icon for the **Utilities** module.
7. Select the following check boxes for **Document Manager**:
  - **View**
  - **Edit**
  - **Add**
  - **Delete**
8. Select the **Save** button.
9. Close the **Permissions** applet.



## Activity 1.4 – Assign Document Type Permissions

In this activity, you will create and set permissions for Document Types.

### Activity Steps

#### Part 1: Create and Set Permissions for a Document Type

1. Navigate to **Utilities > Document Manager**. The **Document Manager** applet opens.
2. Type *Proposal* in the **Enter New Line** field in the **Custom Types** grid.
3. Select the **Save** button.
4. Select the **lock** icon for the **Proposal** Document Type in the **Permissions** column. The **Document Type Permissions** window opens.
5. Select the **View** check box for the **demo** user.
6. Select the **Modify** check box for the **demo** user.
7. Select the **View** check box for the **Accounts Receivable** group.
8. Select the **Modify** check box for the **Accounts Receivable** group.
9. Select the **Save** button. The **Are You Sure?** window opens.
10. Select the **Yes** button to reset permissions.
11. Select the **paper** icon for the **Proposal** Document Type in the **Applets** column. The **Applet Association** window opens.
12. Select the **Allowed** check box for the **Projects** applet.
13. Select the **Save** button.
14. Close the **Document Manager** applet.

#### Part 2: Review Document Types on a Project

1. Navigate to **Project Administration > Projects**. The **Projects** applet opens.
2. Type *20130000* in the **Project Lookup** field.
3. Press **Enter**. The **Million Dollar Bridge** project information displays.
4. Select the **Documents** tab.
5. Select the **Add Document +** icon. The **Document Upload** window opens. Here you can upload documents.
6. Select the **Doc Type** drop-down arrow. The **Proposal** Document Type is available to select.
7. Select the **Cancel** button.
8. Close the **Projects** applet.



## Navigator Query Permissions

Navigator Queries are a powerful search function. They affect most user screens and make finding transactions and/or records easier. The selections available in the Navigator are driven by data queries. Each of these system queries can be edited as needed. Additionally, custom queries can be written to be utilized by the Navigator. Permissions to specific Navigator Queries are granted to user or group.



### Activity 1.5 – Assign Navigator Queries Applet Permissions

In this activity, you will assign permissions to access the Navigator Queries applet.

#### Activity Steps

1. Navigate to **Administration > Permissions**. The **Permissions** applet opens.
2. Select the **Groups** tab.
3. Select the **lock** icon for the **Accounts Receivable** group to add permissions. The **Permissions for Accounts Receivable** window opens.
4. Select the **Group Permissions** tab.
5. Select the **+/-** icon to collapse the tree.
6. Select the **+** icon for the **Utilities** module.
7. Select the following check boxes for **Navigator Queries**:
  - **View**
  - **Edit**
  - **Add**
  - **Delete**
8. Select the **Save** button.
9. Close the **Permission** applet.



## Activity 1.6 – Assign Permissions to Specific Navigator Queries

In this activity, you will assign Navigator Query permissions for the user you created.

### Activity Steps

1. Navigate to **Utilities > Navigator Queries**. The **Navigator Queries** applet opens.
2. Select the **Active By Name** query in the **Clients** section.
3. Select the **Permissions** tab.
4. Select the **Accounts Receivable** check box in the **Groups** table.
5. Select the **Save** button.
6. Close the **Navigator Queries** applet.

## Check Your Understanding



Where are groups created and permissions assigned to groups?

- a) Administration > Permissions
- b) Human Resources > Employees
- c) Utilities > Navigator Queries
- d) Accounts Receivable > Clients



Which module is used for creating a new document type?

- a) Administration
- b) Human Resources
- c) Utilities
- d) Accounts Receivable



Refer to Appendix A for answers to the Check Your Understanding questions.

# LESSON 2: SETTING UP TIME AND EXPENSE

## Learning Objectives

Explain how to set up various components of Time and Expense.

- List the steps to create Timesheet Groups.
- Explain how to create Time and Expense Templates.
- Summarize how to set up Holiday Calendars.
- List the steps to create Expense Codes.
- Explain how to create Expense Units.
- List the steps to create Labor Codes/Groups.
- Explain how to create Job Titles.

## Projects

Projects are used to manage jobs in Unanet AE. These projects integrate with many areas including time and expenses, billing, and administration. As part of this course, you will create simple projects to use with the other activities in this course.



### Activity 2.1 – Create Projects

In this activity, you will create a billable project and an indirect project.

### Activity Steps

#### Part 1: Create a Billable Project

1. Navigate to **Project Administration > Projects**. The **Projects** applet opens.
2. Select **Project** from the **New** menu in the header.
3. Type *20210000* in the **Code** field.
4. Type *Hypoch Park Pedestrian Bridge* in the **Name** field.
5. Select **Billable** from the **Charge Type** drop-down list.
6. Select **City of Portland** in the **Client** field.
7. Select **Time and Materials** from the **Contract Type** drop-down list.
8. Select the **Save** button.

#### Part 2: Create an Indirect Project

1. Select **Project** from the **New** menu in the header.
2. Type *PRDEV* in the **Code** field.

3. Type *Professional Development* in the **Name** field.
4. Select **Indirect** from the **Charge Type** drop-down list.
5. Select the **Save** button.
6. Close the **Projects** applet.

## Timesheet Groups

Timesheet Groups provide a mechanism for the preparation of timesheet coverage periods. Timesheet coverage periods govern the starting and ending dates for a timesheet, which affects how frequently timesheets are submitted. Unanet AE allows for multiple Timesheet Groups. For example, one group of employees submits weekly timesheets while another group submits semi-monthly timesheets. Weekly, biweekly, semi-monthly, and daily timesheets are supported. Any coverage period can be selected, regardless of the payroll cycle. The support for different cycles allows them to co-exist with already established procedures in the firm.

Timesheet Groups are created via Human Resources > Employees. Timesheet Groups is a required field, so one must be assigned to each employee.



### Activity 2.2 – Create and Apply Timesheet Groups

In this activity, you will create a Timesheet Group and assign it to an employee.

#### Activity Steps

##### Part 1: Create a Timesheet Group

1. Navigate to **Human Resources > Employees**. The **Employees** applet opens.
2. Select **Timesheet Groups** from the **Tools** menu in the header. The **Timesheet Groups** window opens.
3. Use the information in the table to create a **Timesheet Group**:

Field	Information
<b>Name</b>	Semi-Monthly
<b>Next Start Date</b>	Current month/1/Current year
<b>Next End Date</b>	Current month/15/Current year
<b>Cycle Type</b>	Semi-Monthly
<b>Holiday Calendar</b>	Not assigned

4. Select the **Save** button.

## Part 2: Apply a Timesheet Group

1. Type *CBA* in the **Employee Lookup** field.
2. Press **Enter**. The **Employees** applet populates with the information for **cadams**.
3. Select **Semi-Monthly** from the **Timesheet Group** drop-down list.
4. Select the **Save** button.
5. Close the **Employees** applet.

## Holiday Calendars

A Holiday Calendar allows you to create a list of holidays that can be both highlighted and pre-filled on a timesheet. When you use Holiday Calendars, it allows Admin staff the ability to manage holidays and helps eliminate employee error. This does not limit time entered on a particularly configured holiday, but simply indicates the holiday and can prefill configured project and hours.

When setting up Holiday Calendars, they can span multiple years by leaving the year blank. You can have one ongoing Holiday Calendar which can be assigned to one or multiple Timesheet Groups. If you prefer to establish one Holiday Calendar per year, you can also configure the system this way.



### Activity 2.3 – Set Up Holiday Calendars

In this activity, you will set up a Holiday Calendar and assign it to a Timesheet Group.

## Activity Steps

### Part 1: Set Up a Holiday Calendar

1. Navigate to **Human Resources > Holiday Calendars**. The **Holiday Calendars** applet opens.
2. Select the **New** button. The **Name?** window opens.
3. Type *2022 Holiday Calendar* in the **Name** field.
4. Select the **OK** button.
5. Select **Lookup** in the **Holiday Project** field. The **Find: Projects** window opens.
6. Select **Indirect** from the **Charge Type** drop-down list.
7. Select the **Search** button.
8. Double-click **90004 Holiday**.
9. Type *8* in the **Hours** field.

10. Use the information in the table to create the **Holiday Dates**:

<b>Holiday Name</b>	<b>Month</b>	<b>Day</b>	<b>Year</b>
<b>New Year's Day</b>	1	1	2022
<b>Memorial Day</b>	5	30	2022
<b>Independence Day</b>	7	4	2022
<b>Labor Day</b>	9	5	2022
<b>Thanksgiving Eve</b>	11	24	2022
<b>Thanksgiving</b>	11	25	2022
<b>Christmas</b>	12	26	2022

11. Select the **Save** button.

12. Close the **Holiday Calendars** applet.

### **Part 2: Apply a Timesheet Group**

1. Navigate to **Human Resources > Employees**. The **Employees** applet opens.
2. Select **Timesheet Groups** from the **Tools** menu in the header. The **Timesheet Groups** window opens.
3. Select **2022 Holiday Calendar** from the **Holiday Calendar** drop-down list for the **Semi-Monthly** Timesheet Group.
4. Select the **Save** button.
5. Close the **Employees** applet.

## Time and Expense Templates

Time and Expense templates are used to auto fill time and/or expense sheets with commonly used projects, such as admin, vacation, or sick. In addition, projects can have default Labor/Expense Codes populate on the timesheet. If no hours are entered for these projects, the projects from the template are removed when submitting. Time and Expense Templates can be set up to allow employees to see their utilization on their timesheets. Unanet AE allows for multiple templates that can be personalized per employee, where they are then assigned.



### Activity 2.4 – Create and Apply Time and Expense Templates

In this activity, you will create a Time & Expense Template and assign it to an employee.

#### Activity Steps

##### Part 1: Create a Template

1. Navigate to **Human Resources > Time & Expense Templates**. The **Time & Expense Templates** applet opens.
2. Select the **New** button.
3. Type *Overhead* in the **Name** field.
4. Select the following check boxes for **Time Utilization**:
  - **Show Direct PCT (%)**
  - **Show Billable PCT (%)**
  - **Show Target PCT (%)**
5. Select the **Sort template projects to top of sheet** check box for **Sort**.
6. Select **Lookup** in **Project Path** field within the grid. The **Projects** window opens.
7. Select **90001 Admin** in the **Projects** table. **Note:** You can use the **Search** field or scroll through the list of projects.
8. Double-click the **project path** in the **Available** table.
9. Select the **Use In Time** check box.
10. Repeat steps 6-9 to add the following projects:
  - **90004 Holiday**
  - **90002 Sick**
11. Select the **Save** button. A list of created templates displays under **Template Name**.
12. Close the **Time & Expense Templates** applet.



## Part 2: Apply a Template

1. Navigate to **Human Resources > Employees**. The **Employees** applet opens.
2. Type *CBA* in the **Employee Lookup** field.
3. Press **Enter**. The **Employees** applet populates with the information for **cadams**.
4. Select **Overhead** from the **Time & Exp. Template** drop-down list.
5. Select the **Save** button.
6. Close the **Employees** applet.

## Expense Codes

Expense Codes allow for the categorization of project expenses which are linked directly to the Chart of Accounts. They can also trigger project markups and default bill status. Used in any expense journal, Expense Codes have a direct effect on financial and project reporting, along with invoicing.

Expense Codes are then assigned to Expense Groups. Then the Expense Group is assigned to a project. Inside the Expense Group, the Expense Code can be further defined to meet the demands of each of your project expenses.



### Activity 2.5 – Create Expense Codes/Groups

In this activity, you will create Expense Codes and Expense Groups.

## Activity Steps

### Part 1: Create an Expense Code

1. Navigate to **Project Administration > Expense Codes**. The **Expense Codes** applet opens.
2. Use the information in the table to create the **Ground Transportation Expense Code**:

Field	Information
<b>Show in Expense Sheet</b>	Select
<b>Active</b>	Select
<b>Code</b>	Ground Transportation
<b>Name</b>	Ground Transportation
<b>Exp. Code Type</b>	Other Direct Charge
<b>Exp. Markup Type</b>	Markup
<b>Markup</b>	1.0
<b>Unit Rate</b>	0.00

<b>Bill Status</b>	Ready to bill
<b>Direct Cost</b>	5540
<b>Overhead</b>	7180
<b>Direct Bill Revenue</b>	4200

3. Select the **Save** button.
4. Close the **Expense Codes** applet.

## Part 2: Create Expense Groups

1. Navigate to **Project Administration > Expense Groups**. The **Expense Groups** applet opens.
2. Select the **New** button on the toolbar. The **New Expense Group** window opens.
3. Type *Architects One* in the **Expense Group Name** field.
4. Type *01/01/2021* in the **Start Date** field.
5. Select the **Check All** check box.
6. Deselect the following check boxes:
  - **007 Other Travel**
  - **008 Consultant**
  - **009 Consultant Non-Billable**
6. Select the **Create** button.
7. Update the **Markup** field to **1.10** for the following **Expense Codes**:
  - **001 Lodging**
  - **003 Meals**
  - **005 Airfare**
  - **010 Office Supplies**
8. Select the **Save** button. **Expense Codes** can be deleted and added as needed within the **Expense Group**.
9. Close the **Expense Codes** applet.

## Part 3: Apply Expense Groups

1. Navigate to **Project Administration > Projects**. The **Projects** applet opens.
2. Type *20210000* in the **Project Lookup** field.
3. Press **Enter**. The **Hypoch Park Pedestrian Bridge** project information displays.
4. Select the **Expense & G/L** tab.
5. Select **Architects One** from the **Expense Group** drop-down list.
6. Select the **Save** button.
7. Close the **Projects** applet.

## Unit Billing

Unit Billing allows for the billing of in-house expenses across multiple projects with a single journal entry. This is accomplished by using Expense Codes/Groups in conjunction with a zero-cost Purchase or Employee Reimbursable Journal Entry.

Expense Codes are used to define the units, which will appear on the project invoice. They control Unit Cost Rate and Unit Bill Rate (or markup). When using this functionality, the Expense Codes are checked as “Is Unit” and have a Unit Type associated with them.



### Activity 2.6 – System Configuration to Support Expense Units

In this activity, you will create an Expense Code to support unit billing.

#### Activity Steps

1. Navigate to **Project Administration > Expense Codes**. The **Expense Codes** applet opens.
2. Use the information in the table to create the **Soil Sample Expense Code**:

Field	Information
Is Unit	Select
Unit	Each
Show in Expense Sheet	Select
Active	Select
Code	Soil Sample
Name	Soil Sample
Exp. Code Type	Other Direct Charge
Exp. Markup Type	Flat Amount
Markup	550.00
Unit Rate	0.00
Bill Status	Ready to bill
Direct Cost	5540
Direct Bill Revenue	4200

3. Select the **Save** button.
4. Close the **Expense Codes** applet.



## Activity 2.7 – Add Unit to Expense Group

In this activity, you will add an Expense Code to an Expense Group.

### Activity Steps

1. Navigate to **Project Administration > Expense Groups**. The **Expense Groups** applet opens.
2. Select **Architects One** from the list. **Architects One** displays in the **Expense Group Name** field.
3. Select **Lookup** in the **Expense Code** field in the **Enter New Line** row. The **Expense Codes Lookup** window open.
4. Double-click **Soil Sample**.
5. Select the **Save** button.
6. Close the **Expense Groups** applet.

## Labor Codes/Groups

Labor Codes are used on the timesheet to designate the type of work that an employee is performing. Labor Codes can be subtotals on Project Management Reports. They cannot hold billing rates, nor do they have budgets.

Labor Codes can be used on direct and/or indirect Projects, with the ability to create Labor Code Groups to limit the Labor Codes available for use on a project or WBS level. Additionally, they support Comment Templates which can require the entry of specified information before a timesheet can be submitted.



## Activity 2.8 – Create Labor Codes/Groups

In this activity, you will create Labor Codes and Labor Code Groups.

### Activity Steps

#### Part 1: Create Labor Codes

1. Navigate to **Project Administration > Labor Codes**. The **Labor Codes** applet opens.
2. Use the information in the table to create the **Training Labor Code**:

Field	Information
<b>Active</b>	Select
<b>Labor Code</b>	TRN

<b>Labor Name</b>	Training
<b>Type</b>	Both
<b>Comment Required</b>	Not selected

3. Select the **Save** button.
4. Use the information in the table to create the **Meeting Labor Code**:

<b>Field</b>	<b>Information</b>
<b>Active</b>	Select
<b>Labor Code</b>	MTG
<b>Labor Name</b>	Meeting
<b>Type</b>	Both
<b>Comment Required</b>	Not selected

5. Select the **Save** button.
6. Close the **Labor Codes** applet.

## Part 2: Create Labor Groups

1. Navigate to **Project Administration > Labor Code Groups**. The **Labor Code Groups** applet opens.
2. Select the **New** button. The **New Labor Code Group** window opens.
3. Type *Training Group* in the **Labor Code Group Name** field.
4. Select the **MTG Meeting** check box.
5. Select the **TRN Training** check box.
6. Select the **Create** button.
7. Close the **Labor Code Groups** applet.

## Part 3: Apply Labor Groups

1. Navigate to **Project Administration > Projects**. The **Project** applet opens.
2. Type *PRDEV* in the **Project Lookup** field.
3. Press **Enter**. The **Professional Development** project information displays.
4. Select the **Expense & G/L** tab.
5. Select **Training Group** from the **Labor Code Group** drop-down list.
6. Select the **Save** button.
7. Close the **Projects** applet.

## Job Titles

Job Titles describe the position held by an employee. Depending on the job, a Job Title can describe the job responsibilities, the level of the job, or both. Job Titles can have Rates associated with them and can be used in setting up Rate Schedules. Job Titles are displayed on Invoice Designs as billing backup. Examples of Job Titles include Architect, Senior Mechanical Engineer, Surveyor, and CAD Operator.



### Activity 2.9 – Create Job Titles

In this activity, you will create a Job Title and assign to an employee.

#### Activity Steps

##### Part 1: Create a Job Title

1. Navigate to **Human Resources > Job Titles**. The **Job Titles** applet opens.
2. Select the **New** button.
3. Use the information in the table to create the **Designer Job Title**:

Field	Information
Code	DES02
Title	Designer II

4. Select the **Save** button.
5. Close the **Job Titles** applet.

##### Part 2: Assign a Job Title to an Employee

1. Navigate to **Human Resources > Employees**. The **Employees** applet opens.
2. Type **CBA** in the **Employee Lookup** field.
3. Press **Enter**. The **Employees** applet populates with the information for **cadams**.
4. Select the **Job Titles** tab.
5. Select **DES02 Designer II** in the **Available Job Titles** grid.
6. Select the **right-facing arrow** icon. The **Job Title** moves to the **Current Job Titles** grid for the employee.
7. Repeat steps **5-6** to add **PRM01 Project Manager** as a **Job Title** for the employee.
8. Type **30** in the **Work %** field for **DES02 Designer II**.
9. Type **70** in the **Work %** field for **PRM01 Project Manager**.
10. Select the **Save** button.
11. Close the **Employees** applet.

# Check Your Understanding



Determine if each statement is true or false.

	True or False
Each employee must be assigned to a Timesheet Group.	
Each employee must be assigned to a Time & Expense Template.	
A Holiday Calendar can be assigned to multiple Timesheet Groups.	
Expense Codes are created via the Project Administration module.	
Expense Codes can be used for unit billing.	
Labor Codes can be utilized on Timesheets for budgeting.	
Labor Code Groups are required to use Labor Codes	
Job Titles are created via the Human Resources module.	



Refer to Appendix A for answers to the Check Your Understanding questions.

# LESSON 3: MANAGING BENEFITS

## Learning Objectives

Recall how to manage Benefits.

- Explain how to set up Benefits.
- Explain how to create Accrual Schedules.

## Benefit Accrual Setup

The Benefit Accrual applet is used to manage the accrual of employee benefits such as sick, vacation, PTO, etc.

Accruals are based on Benefit Projects and enrolled employees. Once benefit projects are established, Benefit Accrual will use accrue hours based on the setup and look to the employee's timesheet to track used hours against the benefit project to calculate each employee's balance.

When you create a Benefit Project, you must have already created an Indirect Project that will be associated with the benefit.



### Activity 3.1 – Set Up Benefits

In this activity, you will create a benefit and enroll employees in the benefit.

## Activity Steps

### Part 1: Create a Benefit

1. Navigate to **Human Resources > Benefit Accrual**. The **Benefit Accrual** applet opens.
2. Select the **New** button on the toolbar. The **Benefit Accrual Setup** window opens.
3. Type *Sick* in the **Name** field.
4. Select **Lookup** in the **Project** field. The **Find: Projects** window opens.
5. Double-click the **90002 Sick** Project.
6. Select the **Calendar** radio button.
7. Select **Calendar** from the **Type** drop-down list.



8. Use the information in the table to complete the **Benefit Year** section:

Field	Information
Days in Year	365
Periods Per Year	1
Work Hours Per Year	2080
Accrue Hours Per Year	40

9. Select the **Calculate** link. The **Accrue Hours Per Period** field autopopulates.  
10. Use the information in the table to complete the **Maximums** section:

Field	Information
Maximum Hours check box	Select
Maximum Hours	40
Maximum Carry Over check box	Select
Maximum Carry Over	0

11. Select the **Save** button.

## Part 2: Enroll Employees

1. Select the **Import Employees** icon above the **Members** grid. The **Import Employees?** message displays.
2. Select the **Yes** button. All active employees are added to the benefit. **Note:** To add a single employee to a benefit, select the **Add** icon.
3. Select the check box for **Casco, Lewis J.**
4. Select the **Delete** icon for **Casco, Lewis J.** The **Are You Sure?** window opens.
5. Select the **Yes** button.
6. Close the **Benefit Accrual** applet.

## Accrual Schedules

Accrual Schedules allow employees to accrue benefits based on length of employment, position, or experience. Accrual schedules can also be used for overrides for those employees who are granted higher accruals than the standard accrual for the company.



### Activity 3.2 – Create Accrual Schedules

In this activity, you will create an Accrual Schedule.

#### Activity Steps

##### Part 1: Create Accrual Schedules

1. Navigate to **Human Resources > Benefit Accrual**. The **Benefit Accrual** applet opens.
2. Select the **Accrual Schedules** button on the toolbar. The **Benefit Schedules** window opens.
3. Select the **+** icon on the bottom-left corner of the window.
4. Type *VAC-Staff* in the **Schedule Name** field.
5. Select the **OK** button.
6. Select the **+** icon on the bottom-left corner of the window.
7. Type *VAC-Management* in the **Schedule Name** field.
8. Select the **OK** button.
9. Select the **VAC-Staff Benefit Schedule** in the **Schedules** section.
10. Use the information in the table to create the **VAC-Staff Benefit Schedule** for year one:

Field	Information
Start Month	0
End Month	11
Hours Per Year	2080
Total Accruable Hours	40
Periods Per Year	12
Accrue Per Period	3.3333 (system generated)
Hours Per Period	173 (system generated)
Max Hours	60
Max Carryover	20

11. Use the information in the table to create the **VAC-Staff Benefit Schedule** for years two and three:

Field	Information
Start Month	12
End Month	35

<b>Hours Per Year</b>	2080
<b>Total Accruable Hours</b>	80
<b>Periods Per Year</b>	12
<b>Accrue Per Period</b>	6.6667 (system generated)
<b>Hours Per Period</b>	173 (system generated)
<b>Max Hours</b>	100
<b>Max Carryover</b>	20

12. Use the information in the table to create the **VAC-Staff Benefit Schedule** for over three years:

<b>Field</b>	<b>Information</b>
<b>Start Month</b>	36
<b>End Month</b>	99,999
<b>Hours Per Year</b>	2080
<b>Total Accruable Hours</b>	120
<b>Periods Per Year</b>	12
<b>Accrue Per Period</b>	10 (system generated)
<b>Hours Per Period</b>	173 (system generated)
<b>Max Hours</b>	140
<b>Max Carryover</b>	20

13. Select the **Save** button.  
 14. Select the **Accrual Schedules** button. The **Benefit Schedules** window opens.  
 15. Select the **VAC-Management Benefit Schedule** in the **Schedules** section.  
 16. Use the information in the table to create the **VAC-Management Benefit Schedule**:

<b>Field</b>	<b>Information</b>
<b>Start Month</b>	0
<b>End Month</b>	99,999
<b>Hours Per Year</b>	2080
<b>Total Accruable Hours</b>	160
<b>Periods Per Year</b>	12
<b>Accrue Per Period</b>	13.3333 (system generated)
<b>Hours Per Period</b>	173 (system generated)
<b>Max Hours</b>	-1
<b>Max Carryover</b>	-1

**Notes:** Entering a **-1** for **Max Hours** allows the maximum to be accrued based on the tier. Entering a **-1** for **Max Carryover** allows for unlimited carryover.

17. Select the **Save** button.

## Part 2: Assign an Accrual Schedule to a Benefit Accrual

1. Select the **New** button on the toolbar. The **Benefit Accrual Setup** window opens.
2. Type *Vacation – Full Time* in the **Name** field.
3. Select **Lookup** in the **Project** field. The **Find: Projects** window opens.
4. Double-click the **90003 Vacation Project**.
5. Select the **Calendar** radio button.
6. Select **Calendar** from the **Type** drop-down list.
7. Select **VAC-Staff** from the **Accrual Schedule** drop-down list.
8. Select the **Save** button.

## Part 3: Enroll Employees

1. Select the **Import Employees** icon above the **Members** grid. The **Import Employees?** warning message displays.
2. Select the **Yes** button. All active employees are added to the benefit.

## Part 4: Override Employee Benefits

1. Double-click **Casco, Lewis J.** The **Employee Benefit Override** window opens.
2. Select the **Override Project Settings** check box.
3. Select the **Calendar (typical)** radio button.
4. Select **Calendar** from the **Type** drop-down list.
5. Select **VAC-Management** from the **Accrual Schedule (optional)** drop-down list.
6. Select the **Save** button.
7. Select the **Refresh** icon. The employee's name displays blue indicating the employee has an override schedule at the employee level.

## Part 5: Run Benefit Accruals

1. Select the **Run Accruals** button. The **Run Benefit Accrual** window opens.
2. Type *1/1/2021* in the **As Of Date** field.
3. Select the **Vacation – Full Time** check box.
4. Select the **Sick** check box.
5. Select the **Run** button. The **Are You Sure?** message displays.
6. Select the **Yes** button. The **Balance** column displays the vacation time that was accrued for each employee for that accrual period. **Note:** To see **Sick Accruals**, use the lookup for the **Sick Benefit**.
7. Select the **Run Accruals** button. The **Run Benefit Accrual** window opens.
8. Type *2/1/2021* in the **As Of Date** field.
9. Select the **Vacation – Full Time** check box.
10. Select the **Run** button. The **Are You Sure?** message displays.
11. Select the **Yes** button. The **Balance** column displays the vacation time that was accrued for each employee.
12. Close the **Benefit Accrual** applet.

## Check Your Understanding



When you create a Benefit Accrual which one of the following must be associated with the benefit?

- a) Project
- b) Accrual Date
- c) Accrual Schedule
- d) Timesheet Group



When creating an Accrual Schedule, which one of the following allows for unlimited carryover over of hours?

- a) 1
- b) 0
- c) -1
- d) 99,999



Refer to Appendix A for answers to the Check Your Understanding questions.

# LESSON 4: PROJECT ADMINISTRATION

## Learning Objectives

Explain how to set up various components of Project Administration.

- List the steps to create Rate Schedules.
- List the steps to create WBS Templates.

## Rate Schedules

Rate schedules can be used to control Pay, Job Cost, and Bill Rates for Projects. Rate Schedules can be applied to any or all nodes of the WBS. Children nodes override parents' nodes.



### Activity 4.1 – Create Rate Schedules

In this activity, you will create Rate Schedules and assign to a Project.

## Activity Steps

### Part 1: Create a Bill Rate Schedule

1. Navigate to **Project Administration > Rate Schedules**. The **Rate Schedules** applet opens.
2. Select the **New** button on the toolbar. The **New Rate Schedule** window opens.
3. Type *Bill Rate by Employee* in the **Schedule Name** field.
4. Select the **Bill Rate Schedule** radio button.
5. Type *01/01/Current year* in the **Start Date** field.
6. Select the **Create** button.
7. Select the **Add Rate** button at the bottom left of the applet. The **Rate Editor** window opens.
8. Select **Lookup** in the **Employee** field. The **Employee Lookup** window opens.
9. Double-click **Adams, Corey**.
10. Select the **Use Flat Rates** check box.
11. Type *50.00* in the **Regular** field.
12. Type *50.00* in the **Premium** field.
13. Select the **Save** button.
14. Select the **Add Rate** button. The **Rate Editor** window opens.
15. Select **Lookup** in the **Employee** field. The **Employee Lookup** window opens.
16. Double-click **Cruz, Theresa A**.

17. Select the **Use Flat Rates** check box.
18. Type *100.00* in the **Regular** field.
19. Type *100.00* in the **Premium** field.
20. Select the **Save** button.
21. Select the **Add Rate** button. The **Rate Editor** window opens.
22. Leave the **Employee** and **Job Title** fields empty. **Note:** All employees not listed on **Rate Schedule** will use this rate.
23. Select the **Use Flat Rates** check box.
24. Type *75.00* in the **Regular** field.
25. Type *75.00* in the **Premium** field.
26. Select the **Save** button.

### **Part 2: Create a Job Cost Schedule**

1. Select the **New** button. The **New Rate Schedule** window opens.
2. Type *Job Cost* in the **Schedule Name** field.
3. Select the **Job Cost Schedule** radio button.
4. Type *01/01/Current year* in the **Start Date** field.
5. Select the **Create** button.
6. Select the **Add Rate** button. The **Rate Editor** window opens.
7. Leave the **Employee** and **Job Title** fields empty. **Note:** All employees not listed on **Rate Schedule** will use this multiplier against their **Pay Rate**.
8. Type *2.5* in the **Overhead** field in the **Multipliers** section.
9. Select the **Save** button.

### **Part 3: Create a Pay Rate Schedule**

1. Select the **New** button. The **New Rate Schedule** window opens.
2. Type *Prevailing Wages* in the **Schedule Name** field.
3. Select the **Pay Rate Schedule** radio button.
4. Type *01/01/Current year* in the **Start Date** field.
5. Select the **Create** button.
6. Select the **Add Rate** button. The **Rate Editor** window opens.
7. Select **Lookup** in the **Employee** field. The **Employee Lookup** window opens.
8. Double-click **Fletcher, Erwin P.**
9. Type *50.00* in the **Min Pay Rate** field in the **Base Rates** section.
10. Select the **Save** button.

**Note:** Any employee not found on the **Rate Schedule** will default to the **Pay Rate** established in their employee record.

### **Part 4: Create Bill Rate Schedule for All**

1. Select the **New** button. The **New Rate Schedule** window opens.
2. Type *Bill Rate TEST* in the **Schedule Name** field.
3. Select the **Bill Rate Schedule** radio button.
4. Type *01/01/Current year* in the **Start Date** field.

5. Select the **Create** button.
6. Select the **Add Rate** button. The **Rate Editor** window opens.
7. Select the **Use Flat Rates** check box.
8. Type *100.00* in the **Regular** field.
9. Type *150.00* in the **Premium** field.
10. Select the **Save** button. This will create a schedule with one line that will apply to all the employees assigned to a project.
11. Close the **Rate Schedules** applet.

### **Part 5: Assign Rate Schedules to Projects**

1. Navigate to **Project Administration > Projects**. The **Project** applet opens.
2. Type *20210000* in the **Project Lookup** field.
3. Press **Enter**. The **Hypoch Park Pedestrian Bridge** project information displays.
4. Right-click **Hypoch Park Pedestrian Bridge** in the **Project Explorer**. A menu displays.
5. Select **Rate Schedules**. The **Rate Schedules** window opens.
6. Select the **Use Rate Schedule** radio button in the **Job Cost** section.
7. Select **Lookup** in the **Use Rate Schedule** field. The **Lookup** window opens.  
**Note:** Select the **Reset Criteria** link if no records display.
8. Double-click **Job Cost**.
9. Select the **Use Rate Schedule** radio button in the **Bill Rate** section.
10. Select **Lookup** in the **Use Rate Schedule** field. The **Lookup** window opens.
11. Double-click **Bill Rate by Employee**.
12. Select the **Use Rate Schedule** radio button in the **Pay Rate** section.
13. Select **Lookup** in the **Use Rate Schedule** field. The **Lookup** window opens.
14. Double-click **Prevailing Wages**.
15. Select the **Save & Close** button.
16. Close the **Projects** applet.

## **WBS Templates**

WBS Templates allow you to create Work Breakdown Structures that are used often and apply them to projects. WBS Templates streamline your project setup and allow for consistency in your WBS coding and naming. These templates can be single level or multi-tiered and can be applied to one node or across multiple nodes at once.





## Activity 4.2 – Create WBS Templates

In this activity, you will create a WBS Template and apply it to a project.

### Activity Steps

#### Part 1: Create a WBS Template

1. Navigate to **Project Administration > WBS Templates**. The **WBS Templates** applet opens.
2. Select the **New** button.
3. Type *Training Template* in the **Template** field.
4. Use the information in the table to create the **parent** nodes in the template:

Code	Name
001	Pre-Design
002	Schematic Design
003	Design Development

5. Select the **+** icon for the **1 Pre-Design** node to add child nodes.
6. Use the information in the table to create the **Pre-Design** child nodes in the template:

Code	Name
10	Civil
20	Electrical
30	Mechanical

7. Repeat steps **5-6** for **Schematic Design** and **Design Development**.
8. Select the **Save** button. The **Save Complete** message displays.
9. Select the **OK** button.
10. Close the **WBS Templates** applet.

#### Part 2: Assign a WBS Template to a Project

1. Navigate to **Project Administration > Projects**. The **Project** applet opens.
2. Type *20210000* in the **Project Lookup** field.
3. Press **Enter**. The **Hypoch Park Pedestrian Bridge** project information displays.
4. Select the **Edit Project Structure** check box under the **Project Explorer**.
5. Right-click **Hypoch Park Pedestrian Bridge** in the **Project Explorer**. A menu displays.
6. Select **Apply WBS Template**. The **Apply WBS Template** window opens.
7. Select **Training Template** from the **WBS Template** drop-down list.  
**Note:** You can only select **Customize** for the **WBS Templates** that are single tiered.
8. Select the **Apply** button. You can edit the **WBS** and add project data as needed.
9. Deselect the **Edit Project Structure** check box.
10. Close the **Projects** applet.

## Check Your Understanding



How do you add or edit the Project WBS?

- a) Right-click the project name and select Edit.
- b) Select the Edit Project Structure check box.
- c) Select File > Edit in the toolbar.
- d) Select the Expense & G/L tab.



Which of the following are rate schedules used to control? Select all that apply.

- a) Bill Rates
- b) Job Cost Rates
- c) Pay Rates
- d) Expense Codes



Refer to Appendix A for answers to the Check Your Understanding questions.

# LESSON 5: MANAGING PM PERMISSIONS AND ACCESS

## Learning Objectives

Summarize how to assign Project Management permissions and access.

- Summarize how to set up permissions for Project Management applets.
- Explain how Project access is granted to PMs.
- Summarize the purpose of Project Roles.
- Explain how to create Resource Groups.

## Permissions and Special Rights for PM Applets

It is important to ensure appropriate Permissions are setup so that when your Project Managers log in, they can access needed Project-related applets. This is managed via the Permissions applet in the Administration module.



### Activity 5.1 – Set Up Permissions and Special Rights for PM Applets

In this activity, you will review the permissions and special rights for PM applets.

#### Activity Steps

##### Part 1: Review the Permissions for Project Managers

1. Navigate to **Administration > Permissions**. The **Permissions** applet opens.
2. Select the **Groups** tab.
3. Select the **lock** icon for the **Project Manager** group. The **Permissions for Project Manager** window opens.
4. Select the **Members** tab. Here you can see which employees are assigned to this permission.
5. Select the **Group Permissions** tab.
6. Select the **+/-** icon to collapse the tree.
7. Select the **+** icon for the **Project Management** module. **Note:** Permissions in the demo environment have already been granted for all **PM** applets.
8. Select the **+** icon for the **PM Bill Review** applet. The **Special Rights** section for **PM Bill Review** displays.

9. Review the permissions. **Note:** By default, the permissions are not selected. Admin needs to determine which permissions are allowed.
10. Repeat steps **8-9** for the following applets:
  - **PM Reports**
  - **Project Central**
  - **Project Planning**
11. Select the **Save** button.
12. Close the **Permissions** applet.

## Part 2: Review Additional PM Permissions

1. Navigate to **Administration > Global Settings**. The **Global Settings** applet opens.
2. Select the **Invoicing** tab.
3. Review the two settings that apply to PMs: **Allow PM To Edit Invoice Comments** and **Allow PM To Apply Fixed Fee Amount**.
4. Select the **Save** button if changes were made.
5. Close the **Global Settings** applet.

## PM Security and Access

Once permissions are in place, Project Managers will be able to access their projects once they are assigned as a Team Leader on the job. Project cost has additional security that is setup in the Employee applet.

Here is a description of the access each role gives you.

Job Type	Description
<b>Project Manager</b>	They can view all projects where they are assigned as the Project Manager in any applet, report, alert, query, and widget assigned through project roles.
<b>Principal-In-Charge</b>	They can view all projects where they are assigned as the Project Manager or the Principal In Charge in any applet, report, alert, query, and widget assigned through project roles.
<b>Project Accountant</b>	They can view all projects in any applet, report, alert, query, and widget assigned through project roles.



## Activity 5.2 – Grant Access to Projects and Cost

In this activity, you will grant access to Projects and Cost.

### Activity Steps

#### Part 1: Assign a Job Type

1. Navigate to **Human Resources > Employees**. The **Employees** applet opens.
2. Type **EPF01** in the **Employee Lookup** field.
3. Press **Enter**. The **Employees** applet populates with the information for **Erwin P. Fletcher**.
4. Verify that the **Project Manager** or **Principal-In-Charge** is selected in the **Job Type** field.
5. Select the **Save** button if changes were made.

#### Part 2: Review Rate Options

1. Select the **Accounting / Rates** tab.
2. Ensure the following **Rate Options** permissions are selected:
  - **Can View Pay Rate**
  - **Can View Pay Rate in Summary**
  - **Can View Job Cost Rate**
  - **Can View Job Cost in Summary**
3. Select the **Save** button if changes were made.
4. Close the **Employees** applet.

#### Part 3: Assign a Project Manager to Project

1. Navigate to **Project Administration > Projects**. The **Projects** applet opens.
2. Type **20210000** in the **Project Lookup** field.
3. Press **Enter**. The **Hypoch Park Pedestrian Bridge** project information displays.
4. Select the **Members** tab.
5. Select **Lookup** in the **Project Manager** field. The **Employee Lookup** window opens.
6. Double-click **Erwin P. Fletcher**. This gives the employee access to this Project when running reports, working with budgets, and performing Bill Review.
7. Select the **Save** button.
8. Close the **Projects** applet.

#### Part 4: Allow Special Rights

1. Navigate to **Administration > Permissions**. The **Permissions** applet opens.
2. Select the **Groups** tab.
3. Select the **lock** icon for the **Project Manager** group. The **Permissions for Project Manager** window opens.
4. Select the **Group Permissions** tab.
5. Select the **+/-** icon to collapse the tree.
6. Select the **+** icon for the **Project Management** module.
7. Select the **+** icon for the **PM Bill Review** applet. The **Special Rights** section for **PM Bill Review** displays.
8. Select the **Allowed** check box for **Can Override Project Leader**. Any employee assigned to this group can access any project, even those they are not assigned as a leader, within the PM Bill Review applet.
9. Select the **Save** button.
10. Close the **Permissions** applet.

## Project Roles

Project Roles give the ability to set up additional Project Leaders on a job, in addition to the Project Manager, Principal in Charge, and Project Accountant. For example, a Junior PM may need access to their Projects to perform only certain PM functions.

Project Roles control the list of Projects returned in specified locations; it does not grant access to Modules/Applets within Unanet AE. Project Roles are first created under List Management. Once created, they are managed in the Project Roles applet. There, you grant "Act as PM" rights in Applets, PM Reports, Custom Reports, Alerts, Queries and Widgets. Once created, you assign the Project Role to a Project.



### Activity 5.3 – Create and Manage Project Roles

In this activity, you will create a Project Role, grant permissions to the Project Role, and assign an employee to a Project Role on a Project.

#### Activity Steps

##### Part 1: Create a Project Role

1. Navigate to **Administration > List Management**. The **Systems List Management** applet opens.
2. Select **User Lists** from the drop-down list.
3. Select **Project Roles** in the list.
4. Type *Junior PM* in the **Display Text** field for row 1. The **ID** is generated by the system after saving.
5. Select the **Save** button.
6. Close the **Systems List Management** applet.

##### Part 2: Add Permissions to a Project Role

1. Navigate to **Administration > Project Roles**. The **Project Roles** applet opens.
2. Double-click **Junior PM**.
3. Select the **Act as PM** check box for the following permissions under each tab:

Applets	PM Reports	Custom Reports
A/R Collections	ExpenseTransactions	Project Figures
A/R Reports	LaborTransactions	Bill Review
Project Planning	ProjectHistory	Contract Backlog

4. Select the **Act as PM** check box for the following permissions under each tab:

Alerts	Widgets
Overbudget Projects	My Projects
Past Due Receivables	

5. Select the **Save** button.
6. Close the **Project Roles** applet.

### Part 3: Assign a Project Role to Project

1. Navigate to **Project Administration > Projects**. The **Projects** applet opens.
2. Type **20210000** in the **Project Lookup** field.
3. Press **Enter**. The **Hypoch Park Pedestrian Bridge** project information displays.
4. Select the **Members** tab.
5. Select **Lookup** in the **Employee Code** field in the **Team Members** section. The **Employee Lookup** window opens.
6. Double-click **Adams, Corey B.**
7. Select **Junior PM** from the **Role** drop-down list for **Adams, Corey B.**
8. Select the **Save** button.
9. Close the **Projects** applet.

## Resource Groups

Resource Groups are defined groups of employees which can be used to limit the list of possible employees to schedule when planning projects.

Project Central allows you to filter by Resource Group and Project Planning supports filtering with Auto Fill.



### Activity 5.4 – Create Resource Groups

In this activity, you will create a Resource Group and assign to a Project.

### Activity Steps

#### Part 1: Create a Resource Group

1. Navigate to **Project Management > Resource Groups**. The **Resource Groups** applet opens.
2. Select the **New** button. The **Resource Group Name** window opens.
3. Type *Design Team* in the **Resource Group Name** field.
4. Select the **OK** button.
5. Select **Lookup** in the **Employee Code** field. The **Employee Lookup** window opens.
6. Double-click **Adams, Corey**.
7. Repeat steps **5-6** to add the following **Employees**:
  - **Hernandez, George J.**
  - **Stanwyk, Gail W.**
8. Select the **Group Leader** check box for **Stanwyk, Gail W.** **Note: Group Leader** is informational only and does not affect scheduling and planning.
9. Select the **Save** button.
10. Close the **Resource Groups** applet.



## Part 2: Assign a Resource Group to a Project

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type **20210000** in the **Project Lookup** field.
3. Press **Enter**. The **Hypoch Park Pedestrian Bridge** project information displays.
4. Select the **Resource Groups** button on the toolbar. The **Resource Group Assignments** window opens.
5. Select **Project** from the **WBS Level** drop-down list.
6. Select **Design Team** from the **Resource Groups** drop-down list.
7. Select the **add** button.
8. Select the **Auto Fill** check box.
9. Close the **Resource Group Assignments** window.
10. Close the **Project Planning** applet.

## Check Your Understanding



Which one of the following determines whether an employee can view pay and/or job cost on reports?

- a) Special Rights
- b) Resource Groups
- c) Project Roles
- d) Rate Options



Where are Resources Groups assigned to a specific project?

- a) Project Management > Resource Groups
- b) Project Management > Project Planning
- c) Project Administration > Projects
- d) Project Administration > WBS Templates



Refer to Appendix A for answers to the Check Your Understanding questions.

# LESSON 6: MANAGING REPORTS

## Learning Objectives

Explain how to set up reporting.

- Recall where reports are managed.
- Explain how to give access to Reporting applets.
- Explain how to manage Report Management reports.
- Explain how to manage Project (PM) reports.
- Explain how to manage Custom Reports.

## Reporting Overview

Reports represent sets of data and support common project management and accounting processes. Each report category is located within an applet in the Utilities module. In Unanet AE, reports are organized into the following categories:

### Financial Statement Designer

Financial Statement Designer provides for flexible statement generation. Here you can utilize existing statements or create custom statements.

### PM Report Designer

Project Management Reports are project-based reports. The original PM report cannot be modified. If you would like to customize the report, you can copy the system version of the report and make changes.

### Invoice Design

Invoice Design allows for the customization of invoices.

### Report Management

All reports not covered under one of the three specific report designers are called standard reports and are located here.

### Custom Reports

Custom Reports allows you to construct custom reports that are housed in the application and appear on the Unanet AE menus.

**Note:** Knowledge of SQL is required.

## Reporting Permissions

You cannot manage reports without the proper access. Once Permissions are established under the Administration module, you can grant access to the individual reports.



### Activity 6.1 – Manage Reporting Management Applets Permissions

In this activity, you will grant permissions to the reporting management applets.

#### Activity Steps

1. Navigate to **Administration > Permissions**. The **Permissions** applet opens.
2. Select the **Groups** tab.
3. Select the **lock** icon for the **Project Manager** group. The **Permissions for Project Manager** window opens.
4. Select the **Group Permissions** tab.
5. Select the **+/-** icon to collapse the tree.
6. Select the **+** icon for the **Utilities** module.
7. Select the **View, Edit, Add, and Delete** check boxes for the following applets:
  - **Custom Reports**
  - **PM Report Designer**
  - **Report Management**
8. Select the **Save** button.  
**Notes:** Access is granted in **Permissions** to individual reports that are housed on the Main Menu. Examples of these reports run under the **General Accounting** module are the **Balance Sheet** and **Income Statement**.
9. Close the **Permissions** applet.

## Managing Report Management Reports

Report Management reports support a wide range of Unanet AE standard processes. Once access has been granted under Permissions, the reports can be managed under the Report Management applet.



### Demo 6.2 – Explore Report Management

In this demo, you will learn about the features in Report Management.

#### Demo Steps

1. Navigate to **Utilities > Report Management**. The **Report Management** applet opens. **Report Management** contains reports that are sprinkled throughout menus and toolbars within the modules in **Unanet AE**.
2. Select **Accounts Payable Reports** from the **Report Types** drop-down list. Three reports are listed: **A/P Aged**, **A/P Balances**, and **A/P Register**.  
**Notes:** Here you can mark a report as inactive; however, that inactivates the report for everyone. Use **Permissions** to determine individual or group access. If any changes are needed to the **Report Management** reports, it first needs to be downloaded, changes made offline, and then uploaded back into **Unanet AE**.
3. Close the **Report Management** applet.

## Managing PM Report Designer Reports

Project Management Reports are project-based reports. PM Report Designer houses PM Reports which can be managed by granting permissions to Unanet AE users. Additionally, defaults can be setup, which help define the parameters when running a specific report.



### Activity 6.3 – Manage PM Reports Permissions and Defaults

In this activity, you will assign PM Report permissions, copy a report, and edit prompt defaults for the report.

#### Activity Steps

##### Part 1: Assign PM Report Designer Permissions

1. Navigate to **Utilities > PM Report Designer**. The **PM Report Designer** applet opens. The standard reports display in red font. Any reports that are customized display in black font.
2. Select **Labor Transactions** from the **Reports** list.
3. Select the **Permissions** tab in the **Labor Transactions** section.
4. Select the **Accounts Receivable** check box in the **Groups** list.
5. Select the **Save** button.

##### Part 2: Edit Prompt Defaults

1. Select the **Edit Prompt Defaults** button. The **Print Criteria** window opens.
2. Select the **Billable** check box in the **Charge Types** section.
3. Deselect the **Charge Types** check box.
4. Select the **Federal Government** check box in the **Sectors** section.
5. Select the **State Government** check box in the **Sectors** section.
6. Select the **Save Defaults** button. A **Success** message displays.
7. Select the **OK** button.

##### Part 3: Copy Labor Transactions Report

1. Select the **Copy Report** button on the toolbar. The **Copy “LaborTransactions”** window opens.
2. Type *LaborTransactions2* in the **Name** field.
3. Select the **OK** button.
4. Select **Labor Transactions (black font)** from the **Reports** list. Now you can make edits to the report details and columns.  
**Note:** To have the updated columns appear when running the report in **Unanet AE**, the display needs to be edited within Visual Studios.
5. Close the **PM Report Designer** applet.

## Managing Custom Reports/Actions

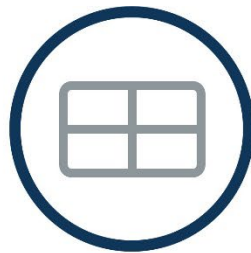
The Custom Reports applet allows users to manage and construct Custom Reports that are housed in the application and appear on the Unanet AE menus. There are several Custom Reports available out of the box and are designated as System. You are unable to modify the original version of a report; however, you can copy a report and modify it, or create a new one using Unanet AE's Report Builder.

A Custom Report is categorized as a Report, Data Grid, Action, or Warning. Once access is granted, the icons on the Main Menu will help you determine the category when accessing reports.



### REPORTS

Miscellaneous reports that are used throughout the system.



### DATA GRIDS

Grid pop-up that displays raw data.



### ACTIONS

Platform for automating workflows and extending functionality of Unanet AE.



### WARNINGS

Dismiss-able pop-up that warns a user before they perform an action.



### Activity 6.4 – Manage Custom Reports/Actions

In this activity, you will manage custom reports and actions.

#### Activity Steps

##### Part 1: Access System Reports

1. Navigate to **Utilities > Custom Reports**. The **Custom Reports** applet opens. You can filter the list of the reports that display.
2. Select **System** from the **System** drop-down list.
3. Select **Reports** from the **Type** drop-down list. This filter lists an assortment of reports that do not pertain to one particular role.

##### Part 2: Run a System Report

1. Double-click **Opportunities** in the **Reports** list.
2. Select the **Preview Report** button on the toolbar. The **Opportunities** window opens.
3. Select the **Print** button. The **Opportunities** report window opens.
4. Select the **Close** button.

### **Part 3: Pin a System Report to a Menu**

1. Select the **Modules / Applets** tab.
2. Select the **Prospect Management** check box in the **Modules** list.
3. Select the **Opportunities** check box in the **Applets** list.
4. Select **Toolbar** from the **Type** drop-down list.
5. Select the **Save** button.

### **Part 4: Assign Permissions**

1. Select the **Permissions** tab.
2. Select the **Accounts Receivable** check box in the **Groups** list.
3. Select the **Save** button.

### **Part 5: Access Actions**

1. Select **System** from the **System** drop-down list.
2. Select **Actions** from the **Type** drop-down list. This filter lists the **Actions** that are available.

### **Part 6: Access Data Grids**

1. Select **System** from the **System** drop-down list.
2. Select **Data Grids** from the **Type** drop-down list. This filter lists the **Data Grids** that are available. This option is typically used by IT.

### **Part 7: Access Warnings**

1. Select **System** from the **System** drop-down list.
2. Select **Warnings** from the **Type** drop-down list. This filter lists the **Warnings** that are available.

### **Part 8: Access Custom Reports**

1. Select **Custom** from the **System** drop-down list.
2. Select **Reports** from the **Type** drop-down list. The reports listed include reports downloaded from **Marketplace** and custom reports built with **ReportBuilder**.
3. Close the **Custom Reports** applet.



## Check Your Understanding



Which module is used to manage reports and invoices?

- a) Utilities
- b) Administration
- c) Personal
- d) Human Resources



Which one of the following applets is used to provide Project Managers access to a report that was downloaded from Marketplace?

- a) Permissions
- b) Report Management
- c) Custom Reports
- d) PM Report Designer



Refer to Appendix A for answers to the Check Your Understanding questions.

# LESSON 7: CREATING REPORTS

## Learning Objectives

Recall the steps to create various reports.

- Recall how to create and edit ReportBuilder Reports.
- Explain how to create Queries.
- Summarize how to use QueryBuilder.
- List the steps to build Financial Statements.
- Explain how to edit existing Invoice Designs.

## ReportBuilder

ReportBuilder is a standalone report building application that allows a user to define column headers, filtering and grouping options, and customize the display. Once created, these reports are managed like all other Custom Report.

ReportBuilder is easily navigated and walks the user through each element in the report design process. The elements of report design include the compilation of data and the organization of that data by means of design. No SQL knowledge is required.

Step	Details
<b>Dataset</b>	Select the information for the report being built.
<b>Fields</b>	Select the fields to be used on the report.
<b>Calculated Fields</b>	Name, configure, and build the supporting expressions.
<b>Sorts</b>	Determine the sorting rules to apply the report.
<b>Filters &amp; Prompts</b>	Determine the method of filtering data: explicit filters or user prompts.
<b>Template</b>	Select a template for the report.
<b>Settings</b>	Configure and customize the selected template.
<b>Groups</b>	Determine the grouping rules to apply the report.
<b>Table Layout</b>	Define the attributes of the table displayed on the report.
<b>Finish</b>	Name the report and install it to Unanet AE.



## Activity 7.1 – Create and Edit ReportBuilder Reports

In this activity, you will create and edit a report using ReportBuilder.

### Activity Steps

#### Part 1: Datasets

1. Navigate to **Utilities > Custom Reports**. The **Custom Report** applet opens.
2. Select the **Launch ReportBuilder** button on the toolbar. The **ReportBuilder** window opens.
3. Select **Time Sheets** from the **Datasets** list.
4. Select the **Next** button on the bottom right corner.

#### Part 2: Fields

1. Type *Project path* in **filter fields**.
2. Select **Project\_path\_1**.
3. Select the **right-facing** arrow to move the field to the **Selected Fields** list.
4. Repeat steps 1-3 to add the following fields to the **Selected Fields** list:
  - **Project\_Name\_1**
  - **Employee\_is\_Active**
  - **Employee\_Code**
  - **Employee\_Name**
  - **Work\_Date**
  - **Work\_Hours**
  - **Effort\_Amount**
  - **Bill\_Hours**
  - **Bill\_Rate**
  - **Pay\_Amount**
5. Use the **up** and **down** arrows to reorder the fields as necessary, so that they appear in the same order as the list in step 4.
6. Select the **Next** button.

#### Part 3: Calculated Fields

1. Select the **Use Calculated Fields** check box.
2. Type *Profit* in the **Field Name** field.
3. Use the **Field Expression** builder to create the following expression:  
(**Bill\_Hours** \* **Bill\_Rate**) – **Pay\_Amount**
4. Select the **Next** button.

#### Part 4: Sorts

1. Select **Project\_Path\_1** from the first **Field Name** drop-down list.
2. Select **Employee\_Code** from the second **Field Name** drop-down list.
3. Select the **Next** button.

### Part 5: Data Filters & Report Prompts

1. Use the information in the table to create the **Data Filters & Report Prompts**:

Field	Label	?	Value (leave blank to prompt)
Employee_is_Active		=	1
Project_Path_1	Project	=	

**Note:** A blank in the **Value** field creates a user prompt.

2. Select the **Next** button.

### Part 6: Templates

1. Select the **use this template** link under the **Landscape: All Pages Header (No Logo)** template.
2. Select the **Next** button.

### Part 7: Settings

1. Type *Employee Hours and Effort by Project* in the **Report Text** field.
2. Deselect the **Show Subtitle** check box in the **2: Subtitle Settings** section.
3. Select the **Next** button.

### Part 8: Groups

1. Use the information in the table to create the **Report Groupings**:

Field	Sort Descending	Show Header	Show Footer	Show Map
Project_Path_1		Select	Select	Select
Employee_Code		Select	Select	

2. Select the **Next** button.

### Part 9: Table Layout

1. Select the **PREVIEW SAMPLE REPORT** button. The **Report Sample** window opens.
2. Close the **Report Sample** window.
3. Type *Project Name* in the second **H** cell.
4. Select the **Work Date/D** cell.
5. Select **MM/dd/yyyy** from the **Format Code** drop-down list in the **CELL STYLING** section.
6. Drag the following **Headers** off the table to remove from the report:
  - **Employee is Active**
  - **Bill Hours**
  - **Bill Rate**
  - **Pay Amount**
7. Select the **ROW SETTINGS** tab.
8. Type *0.2500* in the **Row Height** field.
9. Select the **TABLE & GROUP OPTIONS** tab.

10. Select the **Auto Size** check box for **Column Sizing**.
11. Select the **PREVIEW SAMPLE REPORT** button. The **Sample Report** window opens.
12. Close the **Report Sample** window.
13. Select the **Next** button.

#### **Part 10: Finish the Report**

1. Type *Employee Hours and Effort by Project* in the **Report Name** field.
2. Select the **Save Report** button.
3. Close the **ReportBuilder** window.
4. Select the **Refresh** button on the toolbar. The **Employee Hours and Effort by Project** report displays in the **System: Custom Reports** list.

#### **Part 11: Assign Permissions and Location**

1. Double-click **Employee Hours and Effort by Project**.
2. Select the **Permissions** tab.
3. Select the **Administrator** check box in the **Groups** section.
4. Select the **Modules / Applets** tab.
5. Select the **Project Management** check box.
6. Select the **Save** button.

#### **Part 12: Preview the Report**

1. Select the **Preview Report** button on the toolbar. The **Employee Hours and Effort by Project** window opens.
2. Select **Million Dollar Bridge** in the **Project** field.
3. Select the **Print** button. The **Employee Hours and Effort by Project** report window opens.
4. Select the **Print Layout** button.
5. Select the **Close** button on the report window.

#### **Part 13: Edit the Report**

1. Double-click **Employee Hours and Effort by Project**.
2. Select the **Settings** tab.
3. Select the **ReportBuilder** button in the **Settings** tab. The **ReportBuilder** window opens.
3. Make edits to the report, as necessary.
4. Select the **Finish** tab to save the report.
5. Close the **ReportBuilder** window.
6. Close the **Custom Reports** applet.

## Masterfile Queries

There are seven query applets in Unanet AE:

- Clients
- Contacts
- Firms
- Opportunities
- Vendors
- Projects
- Employees

The concept of the query tools is to allow the user to define lists of data based on a user query definition without having to know how to write SQL code to get results. The list can then be used to navigate to the individual records within the list or can be exported to Excel.

When creating a query, there are three privacy options: personal, private, and public.

- Personal: Visible only to the user who designs them
- Private: Available only to users who have permission to view private queries
- Public: Viewable by everyone



### Activity 7.2 – Create Queries

In this activity, you will create a Client, Vendor, Employee, and Project Query.

#### Activity Steps

##### Part 1: Create a Client Query

1. Navigate to **Accounts Receivable > Client Queries**. The **Client Queries** applet opens.
2. Select the **New** button on the toolbar. The **Query Designer** window opens.
3. Type *Active Clients by Name* in the **Name** field.
4. Select **Personal** from the **Type** drop-down list.
5. Select the **Input** tab.
6. Type *is* in the **Column** field.
7. Select the **Parameter** check box for **Clients IsActive**.
8. Select the **Output** tab.

- Use the information in the table to create the **outputs**:

Table	Column	Show	Column Order
Clients	FirmCode	Select	2
Firms	FirmName	Select	3
Clients	IsActive	Select	1

- Select the **Save** button.
- Select **Active Clients by Name** in the **Client Queries** list.
- Select = from the **Operator** drop-down list in the **Parameters** section.
- Select the **Value 1** check box in the **Parameters** section.
- Select the **Run** button.

## Part 2: Create a Vendor Query

- Navigate to **Accounts Payable > Vendor Queries**. The **Vendor Queries** applet opens.
- Select the **New** button. The **Query Designer** window opens.
- Type *Vendor Pay-to Address* in the **Name** field.
- Select **Personal** in the **Type** field.
- Select the **Input** tab.
- Select the **Parameter** check box for **Vendors Is Active**.
- Select the **Output** tab.
- Use the information in the table to create the **outputs**:

Table	Column	Show	Column Order
Vendors	FirmCode	Select	1
Firms	FirmName	Select	2
Pay-To Addresses	Street1	Select	3
Pay-To Addresses	Street2	Select	4
Pay-To Addresses	City	Select	5
Pay-To Addresses	State	Select	6
Pay-To Addresses	Zip	Select	7

- Select the **Save** button.
- Select **Vendor Pay-to Address** in the **Vendor Queries** list.
- Select = from the **Operator** drop-down list in the **Parameters** section.
- Select the **Value 1** check box in the **Parameters** section.
- Select the **Run** button.

## Part 3: Create a Project Query

- Navigate to **Project Management > Project Queries**. The **Project Queries** applet opens.
- Select the **New** button. The **Query Designer** window opens.
- Type *Active Project by Client* in the **Name** field.
- Select **Personal** from the **Type** drop-down list.

5. Select the **Input** tab.
6. Select the **Parameter** check box for **Project Facts ChargeTypename**.
7. Select = from the **Filter Operator** drop-down list for **Project Facts ChargeTypename**.
8. Type **1** in the **Filter 1** field for **Project Facts ChargeTypename**.
9. Select the **Output** tab.
10. Use the information in the table to create the **outputs**:

Table	Column	Show	Column Order	Sort Order	Ascending
Firms	FirmName	Select	3	1	Select
Projects	ProjectPath	Select	1		
Projects	ProjectName	Select	2		

11. Select the **Save** button.
12. Select **Active Project by Client** in the **Project Queries** list.
13. Select = from the **Operator** drop-down list in the **Parameters** section for the **ChargeTypename** option.
14. Type *Billable* in the **Value 1** field.
15. Select the **Run** button.

#### Part 4: Create an Employee Query

1. Navigate to **Human Resources > Employee Queries**. The **Employee Queries** applet opens.
2. Select the **New** button. The **Query Designer** window opens.
3. Type *Employee Time and Expense Approvers* in the **Name** field.
4. Select **Personal** in the **Type** field.
5. Select the **Input** tab.
6. Select the **Parameters** check box for **Employees IsActive**.
7. Select the **Output** tab.
8. Use the information in the table to create the **outputs**:

Table	Column	Show	Column Order
Employees	EmpCode	Select	1
Employees	Empname	Select	2
Employees	TimeExpApproverEmpname	Select	3
Employees	AltTimeExpApproverEmpname	Select	4

9. Select the **Save** button.
10. Select **Employee Time and Expense Approvers** in the **Employee Queries** list.
11. Select = from the **Operator** drop-down list in the **Parameters** section.
12. Select the **Value 1** check box in the **Parameters** section.
13. Select the **Run** button.
14. Close the **Client Queries** applet.



## Query Builder

Advanced applets in Unanet AE leverage the power and flexibility of SQL queries, where the user can directly query their Unanet AE data.

Query Builder visualizes query writing and dynamically builds Unanet AE-optimized queries for use in applets like Dashboard Queries Manager, Custom Reports, etc.



### Activity 7.3 – Create SQL Queries Using Query Builder

In this activity, you will create an SQL Query using Query Builder.

#### Activity Steps

1. Navigate to **Utilities > Query Builder**. The **Query Builder** applet opens.
2. Select **Accounts Receivable** from the **Datasets** drop-down list.
3. Select the check boxes for the following **Available Fields**:
  - **Clients: Client Is Active**
  - **Clients: Client Name**
  - **Accounts Receivable: Balance**
  - **Accounts Receivable: Invoice Date**
  - **Accounts Receivable: Invoice No**
4. Select the **Filters** tab.
5. Use the information in the table to create the **Filters**:

Field	?	Value (SQL Format)
Client_Name	=	
Client_Is_Active	=	1

6. Select the **Build & Execute** button. On the **Results** tab, the records display for the query. You can export the query or save as an analytic model.
7. Select the **Save As Model** button. The **Enter Name** window opens.
8. Type **QBAR** in the **Enter an Analytic Model Name** field.
9. Select the **OK** button. The **Save Successful** window opens.
10. Select the **OK** button.
11. Close the **Query Builder** applet.
12. Navigate to **Utilities > Dashboard Queries Manager**. The **Dashboard Queries Manager** applet opens.
13. Double-click **QBAR** in the **Query Name** list. The **QBAR** query displays on the **Query** tab.
14. Close the **Dashboard Queries Manager** applet.

## Financial Statement Designer

Financial Statement Designer provides for flexible statement generation. Balance Sheets, Profit & Loss (consolidated and by profit center), and other statements can be created here. This allows a group of G/L accounts to be combined to appear on a financial statement design. Any line item can contain up to fifteen columns, so comparatives between periods and/or budgets can be achieved. Financial statements can use accrual or cash figures.

Financial Statement Designer allows you to utilize Sample Financial Statements or create custom statements. When creating custom statements, you will define lines and columns to hold the rows of G/L Accounts and G/L Periods respectively.



### Activity 7.4 – Create Financial Reports

In this activity, you will create a Financial Report.

#### Activity Steps

##### Part 1: Run Query

1. Navigate to **Utilities > SQL Query**. The **SQL Query** applet opens.
2. Type *fssample\_sav* for **line 1**.
3. Select the **Run Query** button on the toolbar. The **Query Execution Complete** message displays in the upper-right corner. The templates are now available in the designer.
4. Close the **SQL Query** applet.

##### Part 2: Create a Financial Report

1. Navigate to **Utilities > Financial Statement Dsg**. The **Financial Statement Designer** applet opens.
2. Select **Classified Income Statement** from the **Financial Statements** drop-down list to use as a template or reference when creating new Financial Statements.
3. Select the **New** button on the toolbar. The **New Financial Statement** window opens.
4. Type *Sample P&L* in the **Financial Statement Name** field.
5. Select **ANSI A8.5X11 Letter – (2 Columns)** from the **Financial Statement Template** drop-down list.
6. Select the **Create** button.
7. Select the **Columns** tab.

8. Use the information in the table to create **columns**:

Cash/Accrual	Calc. Type	Period Type	Header 1
Accrual	Transactions	Current Period	Current
Accrual	Transactions	Current Fiscal Year	Year-to-Date

9. Select the **Lines** tab.

10. Use the information in the table to create **lines**:

Line Order	Line Label	Command Type	Indentation	Bold
1	INCOME	Text		Select
2		Itemize	10	
3	TOTAL INCOME	Summarize		Select
10	DIRECT EXPENSES	Text		Select
11		Itemize	10	
12	TOTAL DIRECT EXPENSES	Summarize		Select
13	INDIRECT EXPENSES	Text		Select
14		Itemize	10	
15	TOTAL INDIRECT EXPENSES	Summarize		Select
16	TOTAL EXPENSES	Summarize		Select
20	NET INCOME	Summarize		Select

14. Select the **Save** button.

### Part 3: Modify Filter Ranges

1. Select row 2.
2. Select the **Modify Filter Ranges** button. The **Line Filter Criteria** window opens.
3. Select the **System Types** tab.
4. Select the **Financial Type** check box.
5. Select the **Income** check box.
6. Select the **Save** button.
7. Select the **Close** button.
8. Repeat steps 1-7 for the following rows:

Line Order	Line Label	Financial Type	Cost Types
3		Income	
11		Expense	Direct
12	TOTAL DIRECT EXPENSES	Expense	Direct
14		Expense	Indirect
15	TOTAL INDIRECT EXPENSES	Expense	Indirect
16	TOTAL EXPENSES	Expense	

### Part 4: Create a Formula for Net Income

1. Select row 20.
2. Select the **Modify Filter Ranges** button. The **Line Filter Criteria** window opens.

3. Type *Income* in the **Filter Title** field.
4. Select the **Add Values** radio button in the **Math** section.
5. Select the **System Types** tab.
6. Select the **Financial Type** check box.
7. Select the **Income** check box.
8. Select the **Save** button.
9. Select the **+** icon on the bottom-left of the **Line Filter Criteria** window.
10. Type *Expense* in the **Filter Title** field.
11. Select the **Subtract Values** radio button in the **Math** section.
12. Select the **System Types** tab.
13. Select the **Financial Type** check box.
14. Select the **Expense** check box.
15. Select the **Save** button.
16. Select the **Close** button.

#### **Part 5: Assign Permissions**

1. Select the **Permissions** tab.
2. Select the **cadams** check box in the **Users** section.
3. Select the **Save** button.
4. Close the **Financial Statement Designer** applet.

## Invoice Designs

The Invoice Design applet is where Invoice Designs are customized in Unanet AE. Once invoice sections are designed, they are put together to form an invoice design. Invoice designs are then assigned to projects. Invoice designs can be labor only, expense only, or combined (both labor and expense). Designs can be created and edited on the Invoice Designs tab.



### Activity 7.5 – Edit Invoice Design

In this activity, you will make edits to the invoice design.

#### Activity Steps

##### Part 1: Review Invoice Design

1. Navigate to **Utilities > Invoice Design**. The **Invoice Design** applet opens.
2. Select **MixedLogo** from the **Invoice Designs** list. **Note:** This invoice design was downloaded from **Marketplace**.
3. Review the **Design Sections** portion. **Note:** Some of the posting sections are set to **Do Not Print**.

##### Part 2: Add a Logo

1. Select the **Section Designs** tab. This is where the sections are managed.
2. Select **Header** from the **Section Designs** drop-down list.
3. Select **HeaderLogoCustomizableCVS** in the list.
4. Select **Edit Section Images / Settings** in the toolbar. The **Report Images / Settings Editor** window opens. Here you can insert your logo depending on the logo shape.
5. Select the **Cancel** button.

##### Part 3: Show Statement of Accounts

1. Select **Border** from the **Section Designs** drop-down list.
2. Select **BorderCustomizableCVS** in the list.
3. Select **Edit Section Images / Settings** in the toolbar. The **Report Images / Settings Editor** window opens.
4. Select the **Report Settings** tab.
5. Type *True* for the **Show Statement Section** setting in the **Miscellaneous** section.
6. Select the **OK** button.
7. Select the **Save** button at the bottom of the **Section Designs** window.
8. Close the **Invoice Design** applet.

## Check Your Understanding



Which one of the following privacy options would you select for a query if you want only some users to be able to view the query?

- a) Public
- b) Private
- c) Personal
- d) Custom



Which one of the following applets would you use to pin a report to the navigation menu?

- a) Permissions
- b) Report Management
- c) PM Report Designer
- d) Custom Reports



Refer to Appendix A for answers to the Check Your Understanding questions.

# LESSON 8: CREATING AND MANAGING DASHBOARDS

## Learning Objectives

Summarize how to create and manage Dashboards.

- Explain the purpose of Dashboard Groups.
- Summarize how to deploy Dashboards.
- Explain how to customize Dashboard Layouts.

## Dashboard Groups

Dashboard Groups are made up of Classic Widgets and Analytic Dashboards. Dashboards can be configured to support different layouts to organize your data. Employees are assigned a Dashboard Group which governs what they can view and customize on their personal Dashboard.



### Activity 8.1 – Create Dashboard Groups

In this activity, you will create a Dashboard Group.

#### Activity Steps

1. Navigate to **Utilities > Dashboard Groups**. The **Dashboard Groups** applet opens.
2. Type *Finance* in the **Name** field.
3. Select the **Widgets** tab.
4. Select the check boxes for the following **Widgets**:
  - **Activities**
  - **Alerts**
  - **Analytics Container**
  - **Contacts**
  - **Expense Sheets**
  - **Gridget**
  - **My Projects**
  - **Query Chart**
  - **Reports**
  - **Tiles**
  - **Timesheet**

5. Select the **Queries** tab.
6. Select the **Allowed** check box for the **Financial – Cost and Revenue (12 Months) Query**.
7. Select the **Alerts** tab.
8. Select the **Allowed** check box for the following **Alerts**:
  - **Accounts Payable Balances**
  - **Accounts Receivable Balances**
  - **Bank Balances**
  - **Past Due Receivables**
  - **Timesheet due today**
  - **Your Expense Sheet has been rejected**
  - **Your Timesheet has been rejected**
9. Select the **Tiles** tab.
10. Select the **Allowed** check box for the **Bank Balance Tile**.
11. Select the **Gridgets** tab.
12. Select the **Allowed** check box for the following **Gridgets**:
  - **Expense Sheet – Approver**
  - **Expense Sheet – Approver Detail**
13. Select the **My Project Columns** tab. All **Project Columns** are selected by default.
14. Select the **Analytic Dashboards** tab.
15. Select the **Allowed** check box for **P&L Example** in the **Financial** grouping.
16. Select the **Save** button.
17. Close the **Dashboard Groups** applet.



## Deploying Dashboard

Assigning employees to created Dashboard Groups gives them access to all the allowed widgets in the group. Once deployed, the employee can create Dashboard layouts upon login, or Admin can configure on behalf of the group.



### Activity 8.2 – Apply Dashboards

In this activity, you will apply a Dashboard Group to an employee.

#### Activity Steps

1. Navigate to **Human Resources > Employees**. The **Employees** applet opens.
2. Type **CBA** in the **Employee Lookup** field.
3. Press **Enter**. The **Employees** applet populates with the information for **cadams**.
4. Select **Finance** from the **Dashboard Group** drop-down list.
5. Select the **Save** button.
6. Close the **Employees** applet.

## Configuring Dashboards

The Unanet AE Dashboard gives you immediate access to the information that matters most to you. Dashboards can be configured by Admin, or the end users can tailor the Dashboard to meet their unique needs.



### Activity 8.3 – Manage Dashboard Layouts

In this activity, you will customize the Dashboard layout for all employees assigned to the Dashboard Group.

#### Activity Steps

##### Part 1: Add Activities

1. Navigate to **Utilities > Dashboard Groups**. The **Dashboard Groups** applet opens.
2. Double-click **Finance** in the **Dashboard Groups** list.
3. Select the **Configure Dashboards** button on the toolbar. The **Group Dashboard Layout** window opens.
4. Select **Default** from the **blank** drop-down list.
5. Select the **+** icon at the bottom of the **Group Dashboard Layout** window. The **Add Dashboard Widget** window opens.

6. Select **Activities** from the **Add Dashboard Widget** drop-down list.
7. Select the **Add Widget** button.

### Part 2: Add Alerts

1. Select the **+** icon at the bottom of the **Group Dashboard Layout** window.
2. Select **Alerts** from the **Add Dashboard Widget** drop-down list.
3. Select the **Add Widget** button.
4. Select **Alerts** in the **Widgets** list.
5. Select the **Use** check box for the following **Alerts**:
  - **Timesheet due today**
  - **Your Expense Sheet has been rejected**
  - **Your Timesheet has been rejected**
6. Select the **Save** button.

### Part 3: Add Contacts

1. Select the **+** icon at the bottom of the **Group Dashboard Layout** window.
2. Select **Contacts** from the **Add Dashboard Widget** drop-down list.
3. Select the **Add Widget** button.

### Part 4: Add Expense Sheets

1. Select the **+** icon at the bottom of the **Group Dashboard Layout** window.
2. Select **Expense Sheets** from the **Add Dashboard Widget** drop-down list.
3. Select the **Add Widget** button.

### Part 5: Add Timesheets

1. Select the **+** icon at the bottom of the **Group Dashboard Layout** window.
2. Select **Timesheet** from the **Add Dashboard Widget** drop-down list.
3. Select the **Add Widget** button.
4. Select the **Save** button.

### Part 6: Add New Layout

1. Select the **+** icon in the **Dashboard Layout Name** field. The **New Dashboard** window opens.
2. Type *Financials* in the **Name** field.
3. Select the **Classic Dashboard** radio button in the **Type** section.
4. Select the **Create** button.

### Part 7: Add Gridgets

1. Select the **+** icon at the bottom of the **Group Dashboard Layout** window.
2. Select **Gridget** from the **Add Dashboard Widget** drop-down list.
3. Select the **Add Widget** button.
4. Select **Gridget** in the **Widgets** list.
5. Select **Expense Sheet – Approver** from the **Grid Query** drop-down list.

6. Select the **Save** button.
7. Select the **+** icon at the bottom of the **Group Dashboard Layout** window.
8. Select **Gridget** from the **Add Dashboard Widget** drop-down list.
9. Select the **Add Widget** button.
10. Select **Gridget** in the **Widgets** list.
11. Select **Expense Sheet – Approver Detail** from the **Grid Query** drop-down list.
12. Select the **Save** button.

### Part 8: Add My Projects

1. Select the **+** icon at the bottom of the **Group Dashboard Layout** window.
2. Select **My Projects** from the **Add Dashboard Widget** drop-down list.
3. Select the **Add Widget** button.
4. Select **My Projects** in the **Widgets** list.
5. Select **Current Period** from the **Period Type** drop-down list.
6. Select the **Use** check box for the following **Columns**:
  - **PTD Cost**
  - **PTD Billed**
  - **PTD Unbilled**
  - **PTD Profit**
  - **PTD Received**
7. Select the **Chart** check box for the **Columns** in step 6.
8. Select the **Save** button.

### Part 9: Add Query Chart

1. Select the **+** icon at the bottom of the **Group Dashboard Layout** window.
2. Select **Query Chart** from the **Add Dashboard Widget** drop-down list.
3. Select the **Add Widget** button.
4. Select **Query Chart** in the **Widgets** list.
5. Select **Financial – Cost and Revenue** from the **Chart Title** drop-down list.
6. Select the **Save** button.

### Part 10: Add Reports

1. Select the **+** icon at the bottom of the **Group Dashboard Layout** window.
2. Select **Reports** from the **Add Dashboard Widget** drop-down list.
3. Select the **Add Widget** button.
4. Select **Reports** in the **Widgets** list.
5. Select the **Reports** check box for the following **Reports**:
  - **Accounts Payable > A/P Reports**
  - **Accounts Receivable > A/R Reports**
  - **General Accounting > Balance Sheets**
  - **General Accounting > General Journal Reports**
  - **General Accounting > General Ledger Reports**

- **General Accounting > Income Statements**

6. Select the **Save** button.

**Note:** These reports will be visible on the **Dashboard** only if the employee has been granted **Report** permissions.

### **Part 11: Add Tiles**

1. Select the **+** icon at the bottom of the **Group Dashboard Layout** window.
2. Select **Tiles** from the **Add Dashboard Widget** drop-down list.
3. Select the **Add Widget** button.
4. Select **Tiles** in the **Widgets** list.
5. Select **Bank Balance** from the **Tile Query** drop-down list.
6. Select the **Save** button.

### **Part 12: Add Alerts**

1. Select the **+** icon at the bottom of the **Group Dashboard Layout** window.
2. Select **Alerts** from the **Add Dashboard Widget** drop-down list.
3. Select the **Add Widget** button.
4. Select **Alerts** in the **Widgets** list.
5. Select the **Use** check box for the following **Alerts**:
  - **Accounts Payable Balances**
  - **Accounts Receivable Balances**
  - **Bank Balances**
  - **Past Due Receivables**
6. Select the **Save** button.

### **Part 13: Add New Layout**

1. Select the **+** icon in the **Dashboard Layout Name** field. The **New Dashboard** window opens.
2. Type *Analytics* in the **Name** field.
3. Select the **Analytic Dashboard** radio button in the **Type** section.
4. Select the **Create** button.

### **Part 14: Add Analytic Dashboard**

1. Select the **Show** check box for **P&L Example**.
2. Select the **Default Load** check box for **P&L Example**.
3. Select the **Save and Close** button.
4. Close the **Dashboard Groups** applet.

## Check Your Understanding



What is the purpose of Dashboard Groups?

- a) Determines which employees can create Dashboards
- b) Determines what an employee can view on a Dashboard
- c) Determines what access employees have to applets
- d) All of the above



Which one of the following modules is used to customize Dashboards?

- a) Personal
- b) Prospect Management
- c) Utilities
- d) Administration



Refer to Appendix A for answers to the Check Your Understanding questions.

# LESSON 9: CREATING AND MANAGING ANALYTIC DASHBOARDS

## Learning Objectives

Summarize how to create and manage Analytic Dashboards.

- Recall the moving parts associated with Analytic Dashboards.
- List the applet permissions necessary to work with Analytic Dashboards.
- Explain how to download an Analytic Model from Marketplace.
- Recall how to use the Analytic Dashboard Designer tool.
- Summarize how to grant permissions to an analytic dashboard.

## Analytic Dashboard – Moving Parts Overview

Analytic Dashboards are built on the components of data and design. Similar to reports, Analytic Dashboards rely on a dataset (Analytic Model). Each model contains a query that draws from the data source.

Analytic Models provide the data for designing dashboards using the built-in Analytic Dashboard Designer. Created dashboards are then managed in the Analytic Dashboards applet and distributed through Dashboard Groups.

Component	Description
Permissions	Govern user access to applets, models, and dashboards.
Data Source	The source of data used in Analytic Dashboards. Defaults to Unanet AE, but third-party data sources are supported.
Analytic Models	Datasets used to design dashboards. Unanet AE optimized models are available in Marketplace. Additionally, models can be built via Query Builder and managed with Dashboard Queries Manager.
Analytic Dashboard Designer	Design tool for creating Analytic Dashboards.
Analytic Dashboards applet	Applet used for managing Analytic Dashboards.
Dashboard Groups	Used to allow access to Analytic Dashboard views.

## Analytic Dashboards Permissions

Unanet AE relies on permissions to grant access to the Analytic Dashboards feature set. You will need permission to the following applets that are involved with Analytic Dashboards:

- Analytic Dashboard Designer
- Analytic Dashboards
- Dashboard Groups
- Dashboard Groups > Special Rights > Can Save Default Layout
- Dashboard Queries Manager
- Marketplace Purchases



### Activity 9.1 – Work with Analytic Dashboard Applets

In this activity, you will grant permissions to Analytic Dashboard applets.

#### Activity Steps

1. Navigate to **Administration > Permissions**. The **Permissions** applet opens.
2. Select the **Groups** tab.
3. Select the **lock** icon for the **Accounts Receivable** group to add permissions. The **Permissions for Accounts Receivable** window opens.
4. Select the **Group Permissions** tab.
5. Select the **+/-** icon to collapse the tree.
6. Select the **+** icon for the **Utilities** module.
7. Select the **View**, **Edit**, **Add**, and **Delete** check boxes for the following Applets:
  - **Analytic Dashboard Designer**
  - **Analytic Dashboards**
  - **Dashboard Groups**
  - **Dashboard Queries Manager**
  - **Marketplace Purchases**
  - **Query Builder**
8. Select the **+** icon for the **Dashboard Groups** applet. The **Special Rights** options display for **Dashboard Groups**.
9. Select the **Allowed** check box for **Can Save Default Layout**.
10. Select the **Save** button.
11. Close the **Permissions** applet.

## Analytic Models

Analytic Models (or queries) provide the data for designing Analytic Dashboards.

While we have given you the tools to build your own, Unanet AE offers several optimized models available through the Marketplace. Whether downloaded or custom built, Analytic Models are used when designing dashboard views and can be managed in the Dashboard Queries Manager applet.



### Demo 9.2 – Download Analytic Models (Marketplace)

In this demo, you will learn how to download an Analytic Model from Marketplace.



This demo cannot be completed in the Training System.

### Demo Steps

1. Navigate to **Utilities > Marketplace Purchases**. The **Marketplace Purchases** applet opens.
2. Select the **InFocus Marketplace** link in the upper-right corner. The **Unanet AE Support Portal** opens in a new tab.
3. Type *[your email address]* in the **Email Address** field.
4. Type *[your password]* in the **Password** field. **Note:** These are different credentials from your **Unanet AE** login.
5. Select the **Sign In** button. The **Unanet AE Marketplace** opens.
6. Select **Widgets** in the **Browse** section.
7. Select **Analytic Model** from the **SUB-TYPES** list.
8. Select the **Employee Stats by Month Analytic Model** widget.
9. Select the **Free - Get** button. The **TERMS OF SERVICE AGREEMENT** window opens. **Note:** This agreement will only appear for the first download.
10. Select the **Agree** check box.
11. Select the **Get** button.
12. Close the **Unanet AE Support Portal**.
13. Close the **Marketplace Purchases** applet.





## Activity 9.3 – Install the Analytic Model and Assign Permissions

In this activity, you will install the Analytic Model in Unanet AE and assign permissions.

### Activity Steps

#### Part 1: Install the Analytic Model

1. Navigate to **Utilities > Marketplace Purchases**. The **Marketplace Purchases** applet opens.
2. Select **Employee Stats by Month Analytic Dashboard** in the list.
3. Select the **Install / Update** button in the toolbar.

#### Part 2: Assign Model Permissions

1. Select the **Gear** icon in the **Manage** column for **Employee Stats by Month Analytic Model**. The **Dashboard Queries Manager** applet opens.
2. Select **Analytic Models** in the list.
3. Double-click **Employee Stats by Month CVS** in the list.
4. Select the **Model Permissions** tab.
5. Select the **demo** check box in the **Users** list.
6. Select the **Accounts Receivable** check box in the **Groups** list.
7. Select the **Save** button.
8. Close the **Dashboard Queries Manager** applet.
9. Close the **Marketplace Purchases** applet.

## Analytic Dashboard Designer

Analytic Dashboard Designer applet features an intuitive, interactive design environment that displays your dashboards in real-time as you build them. Each design uses a data source and an Analytic Model. The designer supports multiple data sources and multiple models per design (advanced designs).



## Activity 9.4 – Use the Analytic Dashboard Designer Tool

In this activity, you will use the Analytic Dashboard Designer to create and customize an Analytic Dashboard.

### Activity Steps

#### Part 1: Create an Analytic Dashboard

1. Navigate to **Utilities > Analytic Dashboard Designer**. The **Analytic Dashboard Designer** applet opens. **Note:** Select the **Auto Hide** icon at the bottom of the **Navigation** pane to increase your **Workspace**.
2. Select the **New** button on the toolbar. The **Add Model?** window opens.
3. Select the **Yes** button. The **Choose a Model** window opens.
4. Select **Employee Stats by Month CVS**.
5. Select the **Open** button.
6. Select the **Reload Data** icon below the query.

#### Part 2: Add a Chart

1. Select the **Chart** button.
2. Drag the **Hours** field to the **Values** pane.
3. Drag **Transaction\_Date (Year)** to the **Arguments** pane.
4. Select **Month** from the **Transaction\_Date** drop-down list in the **Arguments** section.
5. Drag **Project\_Charge\_Type** to the **Series** pane.
6. Select **Series** (graph) icon on the **Values** pane next to the **Hours** field. The **Series Options** window opens.
7. Select **Stacked Bar**.
8. Select the **OK** button.

#### Part 3: Add a Grid

1. Select the **Grid** button.
2. Drag **Project\_Path\_Level\_1** to the first **Columns** pane.
3. Drag **Project\_Long\_Name\_Level\_1** to the second **Columns** pane.
4. Drag **Hours** to the third **Columns** pane.
5. Select the **Hours** drop-down arrow.
6. Select **Format** from the menu. The **Numeric Format** window opens.
7. Select **Number** in the **Format type** field.
8. Select the **OK** button.
9. Drag **Hours** to the fourth **Columns** pane.
10. Select the **Hours** drop-down arrow.
11. Select **Calculation > Percent of Total** from the menu.
12. Drag **Project\_Charge\_Type** to the **Measures** pane.
13. Select the **Project\_Path\_Level\_1** drop-down arrow.
14. Select **Top N** from the menu. The **Top N Values** window opens.

15. Select the **Enabled** check box.
16. Select the **Show “Others” value** check box.
17. Select the **Apply** button.
18. Select the **OK** button.
19. Select the **Project\_Long\_Name\_Level\_1** drop-down arrow.
20. Select **Top N** from the menu. The **Top N Values** window opens.
21. Select the **Enabled** check box.
22. Select the **Show “Others” value** check box.
23. Select the **Apply** button.
24. Select the **OK** button.
25. Select the **Project\_Charge\_Type** drop-down arrow.
26. Select **Max** from the menu.

#### Part 4: Add a Format Rule to the Grid

1. Select the **Project\_Charge\_Type** drop-down arrow.
2. Select **Add Format Rule > Expression** from the menu. The **Expression** window opens.
3. Select the **+** icon.
4. Select the **Begins with** (green) link in the box.
5. Select **Equals**.
6. Type *Billable* in the **<enter a value>** area.
7. Select the **Bold** icon.
8. Select the **Apply to row** check box.
9. Select the **Apply** button.
10. Select the **OK** button.
11. Right-click the **Hours (Sum)** column in **Grid 1**.
12. Select **Add Total > Auto** from the menu.

#### Part 5: Add a Pie Chart

1. Select the **Pies** button.
2. Drag **Hours** to the **Values** pane.
3. Drag **Project\_Charge\_Type** to the **Arguments** pane.
4. Drag the **Pies 1** tile under the **Grid 1** tile. **Note:** A blue bar displays to indicate where the insert item will land once dropped.

#### Part 6: Add Cards

1. Select the **Cards** button.
2. Drag **Hours** to the **Cards Actual** pane.
3. Drag **Hours\_Billable** to the second **Cards Actual** pane.
4. Drag **Hours\_Indirect** to the third **Cards Actual** pane.
5. Drag **Hours\_Opportunity** to the fourth **Cards Actual** pane.
6. Select the **Design** tab on the ribbon menu.
7. Select the **Arrange in Rows** button.

8. Type **1** in the **Count** field.
9. Drag the **Cards 1** tile under the **Chart 1** tile, if not already placed there. **Note:** A blue bar displays to indicate where the insert item will land once dropped.

### Part 7: Add a Text Box

1. Select the **Home** tab on the ribbon menu.
2. Select the **Text Box** button.
3. Drag **Employee\_Name** to the **Values** pane.
4. Select the **Employee\_Name** drop-down arrow.
5. Select **Max** from the menu.
6. Drag **Employee\_Code** to the second **Values** pane.
7. Select the **Employee\_Code** drop-down arrow.
8. Select **Max** from the menu.
9. Select the **Design** tab on the ribbon menu.
10. Select the **Edit** button.
11. Select the **Insert Field** button.
12. Select **Employee\_Name** from the **Select value** drop-down list.
13. Press **Enter**.
14. Select the **Insert Field** button.
15. Select **Employee\_Code** from the **Select value** drop-down list.
16. Select the **Home** tab in the **Text Box Editor** section.
17. Select to highlight the **Employee\_Name (Max)** text in **Text Box 1**.
18. Select **14** from the **Font Size** drop-down list.
19. Select to highlight the **Employee\_Code (Max)** text in **Text Box 1**.
20. Select the **Italics** icon.
21. Select the **Design** tab in the **Text Box Tools** section.
22. Select the **Edit** button.
23. Drag the **Text Box 1** tile above the **Chart 1** tile. **Note:** A blue bar displays to indicate where the insert item will land once dropped.

### Part 8: Add a Range Filter

1. Select the **Home** tab on the ribbon menu.
2. Select the **Range Filter** button.
3. Drag **Hours** to the **Values** pane.
4. Drag **Transaction\_Date** to the **Argument** pane.
5. Select the **Transaction\_Date** drop-down arrow.
6. Select **Month - Year** from the menu.
7. Drag the **Range Filter** tile above the **Grid 1** tile. **Note:** A blue bar displays to indicate where the insert item will land once dropped.

### Part 9: Create a Master Filter

1. Select **Chart 1** in the **Dashboard**.
2. Select the **Data** tab on the ribbon menu.
3. Select the **Multiple Master Filter** button.
4. Select a **bar** in the **Chart 1** tile to see Grid and Cards filter.
5. Select the **Clear Filter** icon for **Chart 1**.

### Part 10: Finish the Dashboard

1. Select the **Home** tab on the ribbon menu.
2. Select the **Title** button in the **Dashboard** section. The **Dashboard Title** window opens.
3. Type *Employee Hours* in the **Text** field.
4. Select the **Apply** button.
5. Select the **OK** button.
6. Select **Text Box 1**.
7. Select the **Design** tab on the ribbon menu.
8. Deselect the **Show Caption** button.
9. Select **Chart 1**.
10. Select the **Design** tab on the ribbon menu.
11. Select the **Edit Names** button. The **Edit Names** window opens.
12. Type *Hours by Month* in the **Dashboard item name** field.
13. Select the **OK** button.
14. Select the **Y-Axis Settings** button. The **Y-Axis Settings** window opens.
15. Deselect the **Show title** check box.
16. Select the **Apply** button.
17. Select the **OK** button.
18. Select the **Home** tab on the ribbon menu.
19. Select the **Save** button on the toolbar. The **Save Dashboard** window opens.
20. Select **Employee** from the **Grouping** drop-down list.
21. Type *My Hours* in the **Dashboard Name** field.
22. Type *My Hours* in the **Title** field (this should auto-populate).
23. Select the **Save** button.
24. Close the **Analytic Dashboard Designer** applet.

## Analytic Dashboards

Once an Analytic Dashboard view is created, you can manage who has access to work with the design. Often, this may simply be you- the creator of the dashboard view. However, some enterprise environments may have a team of designers managing various dashboard views.

In addition to designer permissions, Analytic Dashboards allow you to edit, copy, delete, import, and export your dashboard. Other management options include activate/deactivate, grouping, titles, etc.



### Activity 9.5 – Manage Analytic Dashboards

In this activity, you will grant permissions to the analytic dashboard you created.

#### Activity Steps

1. Navigate to **Utilities > Analytic Dashboards**. The **Analytic Dashboards** applet opens.
2. Double-click **My Hours** in the list.
3. Select the **Accounts Receivable** check box in the **Groups** list on the **Designer Permissions** tab.
4. Select the **Save** button.
5. Close the **Analytic Dashboards** applet.



## Activity 9.6 – Deploy Analytic Dashboards

In this activity, you will grant access to the created Analytic Dashboard to Dashboard Groups.

### Activity Steps

1. Navigate to **Utilities > Dashboard Groups**. The **Dashboard Groups** applet opens.
2. Double-click **Finance** in the **Dashboard Groups** list.
3. Select the **Analytic Dashboards** tab.
4. Select the **Allowed** check box for the **My Hours** Analytic Dashboard.
5. Select the **Save** button.
6. Select the **Configure Dashboards** button on the toolbar. The **Group Dashboard Layout** window opens.
7. Select **Analytics** from the **blank** drop-down list.
8. Select the **Show** check box for the **My Hours** Analytic Dashboard.
9. Select the **Default Load** check box for the **My Hours** Analytic Dashboard.
10. Select the **Save and Close** button.
11. Close the **Dashboard Groups** applet.

## Check Your Understanding



Determine if each statement is true or false.

	True or False
Dashboards are managed in the Analytic Dashboards applet and distributed through Dashboard Groups.	
Permissions to the various Analytic Dashboard applets are granted using Administration > Permissions.	
All Analytic Models must be downloaded from Marketplace.	
Permissions to specific Analytic Dashboards are granted using the Analytic Dashboard Designer applet.	
Permissions to Analytic Dashboards can be given to users or groups.	



Refer to Appendix A for answers to the Check Your Understanding questions.



# LESSON 10: CUSTOMIZING THE USER INTERFACE

## Learning Objectives

Recall methods used for customizing the user interface.

- Explain how to add an additional column to a grid using Column Chooser.
- Summarize how to create user defined fields.
- Explain how to use the Layout Manager.

## Column Chooser

The Column Chooser contains any additional columns that may not be displayed in the default layout of a grid. It gives you the ability to change the font size for the header (labels) and rows (data). You can add a standard column or a custom column.



### Activity 10.1 – Work with the Column Chooser

In this activity, you will add an additional column to a grid.

#### Activity Steps

##### Part 1: Add a Standard Column

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type **20210000** in the **Project Lookup** field.
3. Press **Enter**. The **Hypoch Park Pedestrian Bridge** project information displays.
4. Select the **Column Chooser (gear)** icon in the **Project** grid. The **Column Chooser** window opens.
5. Select the **Show** check box for **Labor Allocated Hours**.
6. Type *Alloc Hrs* in the **Label Override** field for **Labor Allocated Hours**.

##### Part 2: Review Custom Columns

1. Select the **Custom Columns** tab.
2. Review the information that is needed for creating a custom column.
3. Hover mouse over the **Formula** cell in the **Cus\_Calc\_ETC** column.
4. Select the **Formula (Sigma symbol)** icon in the **Cus\_Calc\_ETC** column. The **Formula Builder** window opens. Here you can build a formula for a custom column.
5. Select the **Cancel** button.
6. Select the **OK** button. The **Alloc Hrs** column is added.

### Part 3: Remove Columns from the Grid

1. Drag the **EAC Amount** header off the table to remove the column from the grid.
2. Close the **Project Planning** applet.

## UDF Designer

Unanet AE gives you the ability to store and utilize user-defined information in fields referred to as UDFs. They are created via Administration > UDF Designer or by clicking the UDF Designer button on the toolbar from supported applets.

You can create UDFs for the following applets:

- Clients
- Vendors
- Employees
- Projects
- Contacts
- ProjectLevel2

To see a list of the UDFs that have been created, go to the respective applets, and click the Custom Fields tab. The label of the Custom Fields tab can be changed at Administration > Global Settings > UDF tab. UDFs can also be used in conjunction with the Layout Manager to incorporate them into the main tabs of the applets.



### Activity 10.2 – Create a User Defined Field (UDF)

In this activity, you will create a user defined field using the UDF Designer.

#### Activity Steps

1. Navigate to **Administration > UDF Designer**. The **UDF Designer** window opens.
2. Select **Employees** from the **Applet** drop-down list.
3. Use the information in the table to create a **UDF**:

Field	Information
<b>Label</b>	Eye Color
<b>Name</b>	Cus_EyeColor
<b>Data Type</b>	Character

**Note:** The **Name** field cannot include punctuation marks or spaces.

4. Select the **Save** button.



## Activity 10.3 – Create a UDF Table

In this activity, you will create a UDF table using the UDF Table Designer.

### Activity Steps

#### Part 1: Create a Table

1. Navigate to **Administration > UDF Table Manager**. The **UDF Table Manager** applet opens.
2. Select the **New** button.
3. Type *Family* in the **Display Name** field.
4. Use the information in the table to create a **column**:

Field	Information
<b>Name</b>	Cus_Spouse
<b>Caption</b>	Spouse
<b>Data Type</b>	Varchar
<b>Size</b>	50

5. Use the information in the table to create a **column**:

Field	Information
<b>Name</b>	Cus_Children
<b>Caption</b>	Children
<b>Data Type</b>	Varchar
<b>Size</b>	50

6. Select the **Save** button.
7. Select the **Data** tab.
8. Select the **Load Data** button.
9. Select the following check boxes:
  - **Allow Insert**
  - **Allow Update**
  - **Allow Delete**
  - **Fit Columns**
10. Select the **Create Gridget** link.
11. Select the **Save** button.
12. Close the **UDF Table Manager** applet.

#### Part 2: Create a User Defined Field for the Table

1. Navigate to **Administration > UDF Designer**. The **UDF Designer** window opens.
2. Select **Employees** from the **Applet** drop-down list.

- Use the information in the table to create a **UDF**:

Field	Information
Label	Family
Name	Grid_Family
Data Type	Gridget
Gridget	Family - Editor

- Select the **Save** button.

## Layout Manager

The Layout Manager gives you the ability to customize the layout of all master file applets: Clients, Contacts, Employees, Firms, Opportunities, Projects, and Vendors. With the Layout Manager, you have the ability to require that additional information be entered before you save, change the order and appearance of any tab (font color and size, location of sections, etc.), and incorporate UDFs into any tab.



### Activity 10.4 – Use the Layout Manager

In this activity, you will use the Layout Manager to customize the Employee applet and add UDFs to a tab.

## Activity Steps

### Part 1: Copy System Form

- Navigate to **Utilities > Layout Manager**. The **Layout Manager** window opens.
- Select **Employees** from the **Forms** drop-down list.
- Select the **Custom Mode** check box.
- Select the **Copy System Form** button. The **Are You Sure?** window opens.
- Select the **Yes** button.

### Part 2: Add a Tab

- Select the **+** icon in the **Tabs** section. The **Layout Tab** window opens.
- Type *Custom* in the **Name** field.
- Select the **Save** button.

### Part 3: Add a Section

- Select **Custom** in the **Tabs** grid.
- Select the **+** icon in the **Sections** section. The **Layout Section** window opens.
- Type *Custom* in the **Name** field.
- Select the **Save** button.

#### **Part 4: Add Fields**

1. Select **Eye Color** in the **User Defined Fields** section.
2. Select the **right-facing arrow** icon. The **Field** window opens.
3. Select the **Save** button.
4. Select **Family** in the **User Defined Fields** section.
5. Select the **right-facing arrow** icon. The **Field** window opens.
6. Type *400* in the **Width** field.
7. Type *100* in the **Height** field.
8. Select the **Save** button.
9. Select the **Add Spacer** link.
10. Close the **Layout Manager** applet.

#### **Part 5: Review the Employees Form**

1. Navigate to **Human Resources > Employees**. The **Employees** applet opens.
2. Select the **Custom** tab. The UDFs that you created display on the tab.
3. Close the **Employees** applet.

## Check Your Understanding



Which one of the following options would you use to add a user defined field to a form?

- a) UDF Designer
- b) UDF Table Designer
- c) Layout Manager
- d) Column Chooser



Which one of the following options would you use to create a user defined field?

- a) UDF Designer
- b) UDF Table Designer
- c) Layout Manager
- d) Column Chooser



Refer to Appendix A for answers to the Check Your Understanding questions.

# APPENDIX A: Check Your Understanding Answer Key

## Lesson 1: Managing System-wide Permissions



Where are groups created and permissions assigned to groups?

- a) Administration > Permissions
- b) Human Resources > Employees
- c) Utilities > Navigator Queries
- d) Accounts Receivable > Clients



Which module is used for creating a new document type?

- a) Administration
- b) Human Resources
- c) Utilities
- d) Accounts Receivable

# Lesson 2: Setting Up Time and Expense



Determine if each statement is true or false.

	True or False
Each employee must be assigned to a Timesheet Group.	T
Each employee must be assigned to a Time & Expense Template.	F
A Holiday Calendar can be assigned to multiple Timesheet Groups.	T
Expense Codes are created via the Project Administration module.	T
Expense Codes can be used for unit billing.	T
Labor Codes can be utilized on Timesheets for budgeting.	F
Labor Code Groups are required to use Labor Codes	F
Job Titles are created via the Human Resources module.	T



## Lesson 3: Managing Benefits



When you create a Benefit Accrual which one of the following must be associated with the benefit?

- a) Project
- b) Accrual Date
- c) Accrual Schedule
- d) Timesheet Group



When creating an Accrual Schedule, which one of the following allows for unlimited carryover over of hours?

- a) 1
- b) 0
- c) -1
- d) 99,999

## Lesson 4: Project Administration



How do you add or edit the Project WBS?

- a) Right-click the project name and select Edit.
- b) Select the Edit Project Structure check box.
- c) Select File > Edit in the toolbar.
- d) Select the Expense & G/L tab.



Which of the following are rate schedules used to control? Select all that apply.

- a) Bill Rates
- b) Job Cost Rates
- c) Pay Rates
- d) Expense Codes

## Lesson 5: Managing PM Permissions and Access



Which one of the following determines whether an employee can view pay and/or job cost on reports?

- a) Special Rights
- b) Resource Groups
- c) Project Roles
- d) Rate Options



Where are Resources Groups assigned to a specific project?

- a) Project Management > Resource Groups
- b) Project Management > Project Planning
- c) Project Administration > Projects
- d) Project Administration > WBS Templates

## Lesson 6: Managing Reports



Which module is used to manage reports and invoices?

- a) Utilities
- b) Administration
- c) Personal
- d) Human Resources



Which one of the following applets is used to provide Project Managers access to a report that was downloaded from Marketplace?

- a) Permissions
- b) Report Management
- c) Custom Reports
- d) PM Report Designer

## Lesson 7: Creating Reports



Which one of the following privacy options would you select for a query if you want only some users to be able to view the query?

- a) Public
- b) Private**
- c) Personal
- d) Custom



Which one of the following applets would you use to pin a report to the navigation menu?

- a) Permissions
- b) Report Management
- c) PM Report Designer
- d) Custom Reports**

## Lesson 8: Creating and Managing Dashboards



What is the purpose of Dashboard Groups?

- a) Determines which employees can create Dashboards
- b) Determines what an employee can view on a Dashboard
- c) Determines what access employees have to applets
- d) All of the above



Which one of the following modules is used to customize Dashboards?

- a) Personal
- b) Prospect Management
- c) Utilities
- d) Administration

# Lesson 9: Creating and Managing Analytic Dashboards



Determine if each statement is true or false.

	True or False
Dashboards are managed in the Analytic Dashboards applet and distributed through Dashboard Groups.	T
Permissions to the various Analytic Dashboard applets are granted using Administration > Permissions.	T
All Analytic Models must be downloaded from Marketplace.	F
Permissions to specific Analytic Dashboards are granted using the Analytic Dashboard Designer applet.	F
Permissions to Analytic Dashboards can be given to users or groups.	T

## Lesson 10: Customizing the User Interface



Which one of the following options would you use to add a user defined field to a form?

- a) UDF Designer
- b) UDF Table Designer
- c) Layout Manager
- d) Column Chooser



Which one of the following options would you use to create a user defined field?

- a) UDF Designer
- b) UDF Table Designer
- c) Layout Manager
- d) Column Chooser



## COMPLETION CERTIFICATE AND EVALUATION

When the course has finished, Unanet University staff will mark the attendance in the Learning Management System (LMS.) This marking is percentage based and may be prorated if a participant was absent for any period of time during the course.

The LMS will generate a completion certificate (including **CPE credits**, where applicable) which will be available to the participant under their Transcript section of the LMS.

We appreciate your feedback on our courses and encourage you to complete the course evaluation.