Unanet University

UNANET AE:
Using Project Management

PARTICIPANT GUIDE

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Table of Contents

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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

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COURSE INTRODUCTION

In this course, you will learn about using the Project Planning applet for planning, scheduling, and allocating resources to projects. You will also learn about key reports.

Learning Objectives

After this session of **Unanet AE: Using Project Management**, participants will be able to:

- Explain how to create a project plan.
- Summarize how to oversee project plans and schedules.
- Identify ways to monitor a project.
- Recall how to manage work assignments with Activities in Unanet AE's web application.
- Describe how to navigate the PM reporting options.

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LESSON 1: PROJECT PLANNING

Learning Objectives

Explain how to create a project plan.

- Recall how to create a Resource Group.
- Summarize how to set project preferences.
- Explain how to create a new project plan.
- Explain how to create a Work Breakdown Structure.
- Describe how to perform basic budget setup.
- Summarize how to use Resource Scheduling.
- Explain how to add allocations.
- Explain how to schedule resources on projects.
- Recall how to budget expenses.
- Summarize how to run Project Planning reports.

Overview

Project plans are a project with a particular charge type. Unlike some systems, there is no disconnect between planning and actual projects. The **Project Planning** applet allows Project Managers to plan, schedule, and allocate resources to their projects. Typically, projects begin as a plan and then migrate to an opportunity or billable (**Projects > General Tab > Contract Type**) state. When in the planning and opportunity stages, the Project Manager has complete control of the project plan. Work Breakdown Structure (WBS) nodes can be added and removed, and budgets can be revised.

Once the project has been changed to a billable or indirect project, the Project Manager can no longer alter budgets (unless they have special permission) or WBS nodes. The moment a project is changed to billable or indirect the current budgets are saved as the baseline budget. These can be used in project management reporting for performance analysis.

Changes to the budgets at this point must go through the Change Order process. Moreover, when the project is changed to billable or indirect, the Project Manager WBS Lockout can be set in the **Projects** applet. This restricts the Project Manager's ability to add or remove WBS nodes to below the level defined in the lockout. The concept for the lockout is to give the Project Manager the freedom to alter the WBS structure at a level lower than any that would affect accounting.

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Key Concepts

- All Project Planning entries automatically save once you leave the field. This eliminates having to save individual sections.
- Project Planning is broken into three sections:
    - **Project -** The **Project** grid is where Project Managers can create the WBS structure of the project, modify budget amounts, and manage change orders, etc. The WBS can be modified when the **WBS** button is selected in this window. The data can be modified when the **Data** button is selected in this window.
    - **Allocations -** The **Allocations** grid is where Project Managers can add allocations to the WBS levels of a project. Allocations must be defined at the lowest level of the project. In the initial planning stages of a project, allocations typically represent the generic resource needs. Allocation totals can define WBS budgets via the Project Rollup feature. Additionally, estimates to complete can be entered against allocations. In the planning stage, estimate to complete will default in from the allocations amount.
    - **Resource Schedule -** The **Resource Schedule** grid is where Project Managers schedule resources. They may be scheduled against generic resources (Job Titles or Expense Codes) or specific resources (Employees or Vendors).
- You can schedule in different modes:
    - **Labor Mode -** The Labor Mode is used to schedule labor resources. Resource scheduling is always made at the lowest level of the WBS. Clicking on the bottom node of the WBS activates the **Resource Scheduler** grid and allows the user to enter resource schedules for the selected WBS.
    - **Non-Labor (ODC, ICC, or OCC) Modes –** ODC (Other Direct Charges), ICC (In-Contract Consulting), and OCC (Out-of-Contract Consulting) Modes are used to schedule expense or vendor resources. Resource scheduling is always made at the lowest level of the WBS. Clicking on the bottom node of the WBS activates the **Resource Scheduler** grid and allows the user to enter resource schedules for the selected WBS.

Field Definitions

Field Definitions are listed below by section.

Toolbar

The **Project Planning** Toolbar gives the user (If given the appropriate permissions) numerous capabilities. The Unanet AE Toolbar is dynamically built in accordance with the active applet on the screen. Aside from the standard toolbar options this applet has a number of additional options including the following:

- **File -** Additional file options

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    - New – Creates a new project plan.
    - New From Template - With appropriate permissions, you can create a new plan from template.
- **Edit -** Additional edit options
    - Preferences - When selected, the **Planning Preferences** window appears.
- **View -** Additional view options
    - Options - When selected, the header showing the project name and rate schedule show in the header.
    - Project Figures - Prints the **Project Figures Report** for the current project.
    - Gantt - Prints the Gantt chart for the current project.
    - Earned Value - Displays the **Earned Value** pop-up.
- **Tools -** Additional tools options
    - Save as Baseline - Saves the budgeted amounts as the baseline for the project.
    - Recalculate Rates - Recalculates rates for allocations, scheduled, and ETC.
- **New**
    - Plan - Creates a new project plan.
    - Plan from Template - With appropriate permissions, you can create a new plan from template.
- **Copy –** Copies the project.
- **Delete –** Deletes the project.
- **Print -** Runs the **Project Planning** Report.
- **Gantt -** Prints the Gantt chart for the current project.
- **Earned Value -** Displays the **Earned Value** window.
- **Percent Complete History -** Displays the **Percent Complete History** window. The percent complete is a “best guess” value of completion of a particular phase at a specific moment in time.
- **Resource Groups -** Brings up the **Resource Groups** window.
- **Planning Mode -** Controls the PM Type of the information that is viewed in Planning. Options are Labor, ODC, OCC, and ICC.
    - Labor Mode - The **Labor** tab is used to allocate and schedule labor resources. Allocations are done at the job title level. The Generic job title can be used to allocate hours and dollars on the WBS to no particular job title. Allocations are always made at the lowest level of the WBS. Clicking on the bottom node of the WBS activates the **Labor Allocations** window and allows the user to enter allocations and schedules for the selected WBS.
    - ICC, ODC, or OCC Mode - Allocations are made at the expense code level. A Generic expense is used to allocate units and dollars on the WBS to no particular expense code. Allocations are always made at the lowest

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level of the WBS. Click on the bottom node of the WBS to activate the ICC, OCC, or ODC window, and then enter allocations and schedules for the selected WBS.

Project Pane

The **Project** pane is where project managers create the WBS structure of the project, make budget changes, etc. While the window displays all levels of the WBS, only the lowest level is available for budget amounts (only when the project type in the Projects applet is Not Billable or Indirect). The WBS can be modified when the **WBS** button is selected in this window. Data can be modified when the **Data** button is selected in this window.

Button Descriptions (Top of Grid)

- **Pencil icon (Edit) –** A window opens that allows you to edit the Project Plan Settings (ex., Code, Name, Client, etc.). **Note:** This functionality is only available to users with Can Edit Project Details special rights in Permissions.
- **Up Arrow icon (Project Roll-ups) –** A window opens that allows you to set roll-up options for the project.
- **Change Order –** A drop-down displays that allows you to select between Request Change Order or View Change Orders.
- **Show Button -** The **Show** button is a quick way to display any level of the WBS.
- **Refresh -** Refreshes the currently loaded data.
- **Sprocket icon (Column Chooser) -** A window opens that allows you to select the columns that you would like to see in your Project section. Changes made here are unique to the individual user.

Button Descriptions (Bottom of Grid)

- **Data –** Click to modify the data in the Project Grid.
- **WBS –** Click to modify the WBS in the Project Grid.
- **Papers icon (Apply WBS Template) –** Click to apply a WBS Template to the current project.
- **Greyscale Bars Button –** Click to change the grid view to a colorless view.
- **Color Bars Button –** Click to change the grid view to a view with color.

Project Grid

- **Code -** Code of the Project Level.
- **Name -** Name of the Project Level.
- **Start Date -** Project Start Date for the Project Level.
- **End Date -** Project End Date for the Project Level.
- **Labor Budget Hours -** Budgeted Hours. Must be entered at the lowest node of the project.

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- **Labor Budget Amount -** Budgeted Dollars. Must be entered at the lowest node of the project.

Allocations Pane

The **Allocations** pane is where project managers make allocations to the WBS levels of a project. Allocations must be defined at the lowest level of the project. In the initial planning stages of a project, allocations typically represent the initial budget. As the project progresses, the allocations can be altered if desired. Additionally, Estimates to Complete can be entered against allocations. In the planning stage, Estimate to Complete will default in from the allocations amount.

Button Descriptions (Top of Grid)

- **Refresh -** Refreshes the currently loaded data.
- **Sprocket icon (Column Chooser) –** A window opens that allows you to select the columns that you would like to see in your Project section.

Button Descriptions (Bottom of Grid)

- **Grid icon (Grid View) Button –** Opens the Allocations window in the grid view.
- **Chart icon (Chart View) Button –** Opens the Allocations window in the chart view.

Allocations Grid

- **Code -** Code of the Project Level
- **Name -** Name of the Project Level
- **Alloc. Units -** Allocated Units (Hours for labor / Units for non-labor).
- **Alloc. Amount -** Allocated Dollars
- **ETC Units -** Estimate to Complete Units (Hours for labor / Units for non-labor).
- **ETC Amount -** Estimate to Complete Dollars
- **Rate -** Displays the Labor Rate for Labor and the Cost or Marked Up rate for Expenses. This is driven by the Budget By Rate setting located in the Project Plan Settings.
- **% of Budget -** Percentage of Budget that the allocation represents. When filled out, the allocation will look at the budget amount from the Project grid to calculate the figures.

Resource Schedule Pane

Resource schedules are entered against allocations. They may be scheduled against individual resources (for labor) or vendors (for non-labor) or against no particular resource (for labor) or vendor (for non-labor) by using the Generic resource name or General Vendor name, respectively.

Key Concepts

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- **Timeline / Timeline pane -** The Timeline has an adjustable “Timeline pane” that allows you to move and adjust the time frame of the data you are viewing in the schedule window. It also shows you the entire timeline of the project, start to finish. To toggle between having the date range locked and unlocked, click on the lock icon.

- All resources represent a dot on the timeline letting you see if there are any resources scheduled anywhere throughout the life of the project. Both actuals and baselines can be shown on the timeline by going to Planning Preferences (Edit menu > Planning Preferences > Schedules tab) and selecting Include Actuals and Include Baseline. There is a legend on the right of the timeline. The dots are color coded to allow you to differentiate between schedules, actuals, and baseline data.

- An Auto Schedule utility is available on a per row basis. Simply hold down the **Control** key, left-click on the desired cells, and release the **Control** key. The Auto Schedule utility will then display.

Button Descriptions (Top of Grid)

- **Refresh -** Refreshes the currently loaded data.
- **Wand icon (Schedule By Percentage Wizard) -** A window opens that allows you to schedule an employee by percentage.
- **Clock icon (Timeline Button) -** This button expands/collapses the timeline.
- **Lock icon -** When selected, the timeline is locked to the start and end dates.
- **Start Date -** The start date of the timeline.
- **End Date -** The end date of the timeline.
- **Day, Week, Month (Data View Mode) -** Controls the "buckets" of units displayed in the Resource Schedule grid.
  Note: The timeline displays up to 120 units of the selected Mode (i.e. 120 days).
- **Pane Range -** Displays the date range of the adjustable timeline pane.
- **Sprocket icon (Column Chooser) -** A window opens that allows you to select the columns that you would like to see in your Project section.

Button Descriptions (Bottom of Grid)

- **+/- -** The expander button expands and collapses the items in the **Resource Schedule** grid.
- **u (Units / Hours) -** View units in the **Resource Schedule** window.
- **$ (Dollars) -** View dollars in the **Resource Schedule** window.
- **u/$ (Units & Dollars) –** View both units and dollars in the **Resource Schedule** window.

Resource Schedule Grid

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- **Resource Code -** Code of the resource. In Labor Mode, it is the Employee Code. In Non-Labor Mode, it is the Vendor Code.
- **Resource Name -** Name of the resource. In Labor Mode, it is the Employee Name. In Non-Labor Mode, it is the Vendor Name.
- **Allocation Code -** Code of the allocation. In Labor Mode, it is the Job Title Code. In Non-Labor Mode, it is the Expense Code.
- **Allocation Name -** Name of the allocation. In Labor Mode, it is the Job Title Name. In Non-Labor Mode, it is the Expense Name.
- **Date Columns -** Number of hours the employee has been scheduled for the specified time frame.

Column Chooser

The Column Chooser contains any additional columns that may not be displayed in the default layout of a grid. Columns are read-only unless otherwise noted. Some columns show values that aggregate “Used” values but also have variations that filter to transactions “Marked” with a specific bill status:

- R - Ready to Bill
- H - Hold
- B - Billed
- W - Write-off
- N - Never Bill

Planning Mode: Labor

- Labor Allocated Amount - Allocated dollars accumulated from resource allocations.
- Labor Allocated Hours - Allocated hours accumulated from resource allocations.
- Labor Amount % - Percent total of the labor budget amount in relation to its parent node. Allows input if unlocked.
- Labor Budget Amount - Budget dollars manually entered or automatically populated from Rollup.
- Labor Budget Hours - Budget hours manually entered or automatically populated from Rollup.
- Labor Contract Cap - This amount can be updated from Budget Amounts when you click **Rollup** and select *Contract=Budget* and choose **Cap**.
- Labor ETC Amount - Estimate to complete dollars accumulated from resource allocations.
- Labor ETC Hours - Estimate to complete hours accumulated from resource allocations.
- Labor Fixed Fee - Fixed Fee amount. This amount updates from Budget Amounts when you click **Rollup** and select *Contract=Budget* and choose **Fixed Fee**.

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- Labor Hours % - Percent total of the labor budget hours in relation to its parent node. Allows input if unlocked.
- Labor ICC Fixed Fee Portion - Dollar amount of fixed fee that should be attributed to ICC for the entire WBS node.
- Labor Percent Complete - Labor budget percent complete. Allows input.
  Labor Scheduled Amount Remaining - Labor scheduled amount from the “As Of” date forward.
- Labor Scheduled Amount Total – Total labor scheduled amount.
- Labor Scheduled Hours Remaining - Labor scheduled hours from the “As Of” date forward.
- Labor Scheduled Hours Total - Total labor scheduled hours.
- Labor Used Amount To Date - Labor used dollars accumulated from project transactions through the specified “As Of” Date.
- Labor Used Amount To Date Marked R, H, B, W, or N - Labor used dollars, accumulated from project transactions through the specified “As Of” date, filtered to the specified bill status.
- Labor Used Hours To Date Marked R, H, B, W, or N – Labor used hours, accumulated from project transactions through the specified “As Of” date, filtered to the specified bill status.
- Labor Used Hours Total - Total labor used hours, accumulated from project transactions.
- Labor Used Hours Total Marked R, H, B, W, or N – Total labor used hours, accumulated from project transactions, filtered to the specified bill status.
- Total Committed Cost - The sum of all associated Purchase Orders that have been issued.

Planning Mode: ODC (Other Direct Charges)

- **ODC Allocated Amount -** Allocated dollars accumulated from resource allocations.
- **ODC Allocated Units -** Allocated units accumulated from resource allocations.
- **ODC Amount % -** Percent total of the ODC budget amount in relation to its parent node. Allows input if unlocked.
- **ODC Budget Amount -** Budget dollars manually entered or automatically populated from Rollup.
- **ODC Contract Cap -** This amount can be updated from Budget Amounts when you click **Rollup** and select *Contract=Budget*.
- **ODC ETC Amount -** Estimate to complete dollars accumulated from resource allocations.
- **ODC ETC Units -** Estimate to complete units accumulated from resource allocations.
- **ODC Percent Complete –** ODC budget percent complete. Allows input.

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- **ODC Scheduled Amount Remaining -** ODC scheduled amount from the “As Of” date forward.
- **ODC Scheduled Amount Total -** Total ODC scheduled amount.
- **ODC Scheduled Units Remaining -** ODC scheduled units from the “As Of” date forward.
- **ODC Scheduled Units Total -** Total ODC scheduled units.
- **ODC Used Amount To Date -** ODC used dollars accumulated from project transactions through the specified “As Of” date.
- **ODC Used Amount To Date Marked R, H, B, W, or N -** ODC used dollars, accumulated from project transactions through the specified “As Of” date, filtered to the specified bill status.
- **ODC Used Amount Total -** Used dollars accumulated from project transactions.
- **ODC Used Amount Total Marked R, H, B, W, or N -** ODC used dollars, accumulated from project transactions, filtered to the specified bill status.
- **ODC Used Units To Date -** ODC used units accumulated from project transactions through the specified “As Of” date.
- **ODC Used Units To Date Marked R, H, B, W, or N -** ODC used units, accumulated from project transactions through the specified “As Of” date, filtered to the specified bill status.
- **ODC Used Units Total -** Used units accumulated from project transactions.
- **ODC Used Units Total Marked R, H, B, W, or N -** ODC used units, accumulated from project transactions, filtered to the specified bill status.

Planning Mode: ICC (In-Contract Consultants)

- **ICC Allocated Amount -** Allocated dollars accumulated from resource allocations.
- **ICC Allocated Units -** Allocated units accumulated from resource allocations.
- **ICC Amount % -** Percent total of the ICC budget Amount in relation to its parent node. Allows input if unlocked.
- **ICC Budget Amount -** Budget dollars manually entered or automatically populated from Rollup.
- **ICC ETC Amount -** Estimate to complete dollars accumulated from resource allocations.
- **ICC ETC Units -** Estimate to complete units accumulated from resource allocations.
- **ICC Fixed Fee Portion -** Dollar amount of fixed fee that should be attributed to ICC for the entire WBS node.
- **ICC Percent Complete -** ICC budget percent complete. Allows input.
- **ICC Scheduled Amount Remaining -** ICC scheduled amount from the “As Of” date forward.
- **ICC Scheduled Amount Total -** Total ICC scheduled amount.

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- **ICC Scheduled Units Remaining -** ICC scheduled units from the “As Of” date forward.
- **ICC Scheduled Units Total -** Total ICC scheduled units.
- **ICC Used Amount To Date -** ICC used dollars accumulated from project transactions through the specified “As Of” date.
- **ICC Used Amount To Date Marked R, H, B, W, or N -** ICC used dollars, accumulated from project transactions through the specified “As Of” date, filtered to the specified bill status.
- **ICC Used Amount Total -** Used dollars accumulated from project transactions.
- **ICC Used Amount Total Marked R, H, B, W, or N -** ICC used dollars, accumulated from project transactions, filtered to the specified bill status.
- **ICC Used Units To Date -** ICC used units accumulated from project transactions through the specified “As Of” date.
- **ICC Used Units To Date Marked R, H, B, W, or N -** ICC used units, accumulated from project transactions through the specified “As Of” date, filtered to the specified bill status.
- **ICC Used Units Total -** Used units accumulated from project transactions.
- **ICC Used Units Total Marked R, H, B, W, or N -** ICC used units, accumulated from project transactions, filtered to the specified bill status.

Planning Mode: OCC (Out-of-Contract Consultants)

- **OCC Allocated Amount -** Allocated dollars accumulated from resource allocations.
- **OCC Allocated Units -** Allocated units accumulated from resource allocations.
- **OCC Amount % -** Percent total of the OCC budget Amount in relation to its parent node. Allows input if unlocked.
- **OCC Budget Amount -** Budget dollars manually entered or automatically populated from Rollup.
- **OCC Contract Cap -** This amount can be updated from Budget Amounts when you click **Rollup** and select *Contract=Budget*.
- **OCC ETC Amount -** Estimate to complete dollars accumulated from resource allocations.
- **OCC ETC Units -** Estimate to complete units accumulated from resource allocations.
- **OCC Percent Complete -** OCC budget percent complete. Allows input.
- **OCC Scheduled Amount Remaining -** OCC scheduled amount from the “As Of” date forward.
- **OCC Scheduled Amount Total -** Total OCC scheduled amount.
- **OCC Scheduled Units Remaining -** OCC scheduled units from the “As Of” date forward.
- **OCC Scheduled Units Total -** Total OCC scheduled units.

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- **OCC Used Amount To Date -** OCC used dollars accumulated from project transactions through the specified “As Of” date.
- **OCC Used Amount To Date Marked R, H, B, W, or N –** OCC used dollars, accumulated from project transactions through the specified “As Of” date, filtered to the specified bill status.
- **OCC Used Amount Total -** Used dollars accumulated from project transactions.
- **OCC Used Amount Total Marked R, H, B, W, or N –** OCC used dollars, accumulated from project transactions, filtered to the specified bill status.
- **OCC Used Units To Date -** OCC used units accumulated from project transactions through the specified “As Of” date.
- **OCC Used Units To Date Marked R, H, B, W, or N -** OCC used units, accumulated from project transactions through the specified “As Of” date, filtered to the specified bill status.OCC Used Units To Date Marked R, H, B, W, or N - OCC used units, accumulated from project transactions through the specified “As Of” date, filtered to the specified bill status.
- **OCC Used Units Total -** Used units accumulated from project transactions.
- **OCC Used Units Total Marked R, H, B, W, or N –** OCC used units, accumulated from project transactions, filtered to the specified bill status.

Planning Mode: Other

- **Start Date -** Start date for the WBS node. This column will allow input to the lowest level nodes of a WBS.
- **End Date -** End date for the WBS node. This column will allow input to the lowest level nodes of a WBS.
- **Notes -** Plan Notes for the WBS node. This column will allow input to any node of a WBS below the Project level.

Tour 1.1 – Review the Project Planning Applet

In this tour, you will review the Project Planning applet, including the toolbar, windows, and column chooser.

Resource Groups

Resource Groups are named groups of employees used to make data entry in Project Planning easier.

Key Concepts

- The purpose of a resource group is to quickly add multiple resources to a plan.

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- There's an **Auto-Fill** check box that allows for zero hour resources to fill in on the WBS so that you can enter time without having to fill in the resources every time. Once you are done, uncheck auto-fill and the zero hour resources will go away.
- **None** must be selected under **Fill Labor Allocations & Resources By** under Project Plan Settings for this functionality to work.

Field Definitions

Resource Groups Grid

- **Name -** This column contains the name of the Resource Group. To create a Resource Group, click **New**.
    - Once saved, the name will appear in this column.

Members Grid

- **Employee Code -** Employee Code selected.
- **Employee -** Employee Name.
- **Job Title -** Job Title to be selected with the Employee.
- **Group Leader -** Employee designated as the leader of the group. Informational Only

Activity 1.2 – Create a Resource Group

In this activity, you will create a resource group.

Activity Steps

Desktop

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 *Team A* in the **Resource Group Name** field.
4. Select the **OK** button.
5. Select the **Employee Code** Lookup icon. The **Employee** window opens. **Note:** The lookup icon displays when the cursor hovers over the **Employee Code** cell.
6. Double-click **Casco, Lewis J**.
7. Repeat steps **5-6** to add the following **Employees** to the group:
    - **Stanwyk, Gail W.**
    - **Cruz, Theresa A.**
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.

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Project Preferences

This is where the project preferences are set. These are set for all projects in project planning.

Field Definitions

General Tab

- **Include Unsubmitted Time –** Select to include unsubmitted time in actuals.
- **Include Unapproved Time -** Select to include unapproved time in actuals.

Project Tab

- **Show Labor Amount % -** Select to show labor amount %.
- **Show Labor Hours % -** Select to show labor hours %.
- **Show ODC Amount % -** Select to show ODC Amount %
- **Show OCC Amount % -** Select to show OCC Amount %
- **Show ICC Amount % -** Select to show ICC Amount %.

Allocations Tab

- **Use Allocations -** When unchecked, the allocations window is hidden.

Schedules Tab

Options

- **Use Resources -** When unchecked, the resources in the Resource Schedule window are hidden.

Scheduling

- **Auto Calculate Dollars from Hours (Labor) -** When checked, dollars will be calculated by comparing the Hours to the rate in the rate schedule.
- **Allow Over Scheduling -** When checked, you will be allowed to over-schedule resources.
- **Auto Fill From Rate Schedule -** When **Filter Labor Allocations & Resources By** on the Project Plan Settings is set to Rate Schedule, Zero hour resources fill in to every node. They stay there until this box is unchecked. This prevents you from having to enter the resource every time when creating a plan.
- **Include Actuals -** When checked, Actual figures will be displayed in the Resource Schedule section on the Project Planning screen.
- **Include Baseline -** When checked, Baseline figures will be displayed in the Resource Schedule section on the Project Planning screen. You must run the Save as Baseline feature located on the toolbar for these figures to populate.

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Hours Per day

- **Hours Per Day text-box-** Number of hours to schedule per day on auto-scheduling. If zero, hours will be evenly distributed across date range.

Allowable Days

- **Allowable Days –** Select which days of the week can be included when scheduling.

Activity 1.3 – Determine Project Planning Preferences

In this activity, you will determine project planning preferences, including the auto-fill from rate schedule functionality.

Activity Steps

Desktop

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Select the **Lookup** icon in the **Search** field. The **Projects** window opens.
3. Select **Billable** in the **Charge Type** field.
4. Select the **Search** button.
5. Double-click **Hans Gruber Menswear**.
6. Select **Edit > Preferences**. The **Planning Preferences** window opens.
7. Select the **Schedules** tab.
8. Select the **Auto Fill From Rate Schedule** check box.
9. Select the **Save** button.
10. Select the **Edit** icon for the Project grid. The **Project Plan Settings** window opens.
11. Verify the **Rate Schedule** radio button in the **Rate Method** section.
12. Verify **Standard Bill Rates** in the **Rate Schedule** field.
13. Select the **Rate Schedule** radio button in the **Filter Labor Allocations & Resources By:** section.
14. Select the **Save** button.

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Activity 1.4 – Use the Column Chooser

In this activity, you will use the column chooser.

Activity Steps

Desktop

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type *20200002* in the **Search** field.
3. Press **Enter**. The **Project Planning** applet populates with information for **New Brewery Location**.
4. Select the **Column Chooser** icon for the **Project** grid. The **Column Chooser** window opens.
5. Select the **Show** check box for **Total Committed Cost**.
6. Select the **Ok** button.

Web

1. Select **Project Central**. The **Projects** applet opens.
2. Click the **New Brewery Location** name. The data for the project populates.
3. Select the **Planning** tab.
4. Select **Options > Manage Columns**.
5. Select the **ICC tab**.
6. Select the **Show** check box for the **ICC Allocated Amount** column.
7. Select the **Save** button.

Project Plan

Project Plans can be created in **Project Management > Project Planning** and give Project Managers complete control over planned WBS, budgets, schedules, allocations, etc.

Field Definitions

Project Info

- **Code -** Project Code.
- **Name -** Project Name.
- **Client -** Client associated with the project.
- **Budget By Rate -** Rate that you want the plan to budget by. Budget By Rate has three types: labor can be at pay rate, job cost rate, or bill rate. The name of this Rate Schedule is displayed on the header of the Project Plan when it is loaded in Project Planning.
- **Start Date -** Start date of the project.
- **End Date -** End date of the project.

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- **Resource Group Level -** Level at which the Resource Group will be applied.
- **Template -** When checked, this project is flagged as a template. When you select **New (Toolbar) > Plan From Template**, you will see this project in the Templates list.
- **Restrict Time Entry to Members -** When checked, time entry is limited to those members associated with the **Project > Members tab**.

Rate Method

Here you select the method in which your figures are calculated in the plan. **Note:** You can only select one option.

- **Other -** Rates default to the employee record to get the Job Cost Rate or the Bill Rate field located in **Employees > Accounting/Rates tab**.
- **Rate Schedule -** The rates calculated in the plan are derived from the Rate Schedule that you assign here.
  Note: Rate schedules are date sensitive. Make sure that your rate schedule encompasses all time periods for which you will be scheduling/allocating.
- **Multipliers -** Rates are calculated by taking the Pay Rate from the **Employees > Pay History tab** and applying the multipliers set in the Labor Multipliers box on the right.
- **Apply for Premium Time -** When checked, the multipliers will be applied to Overtime transactions.

Labor Multipliers

Labor Multipliers are used when you select **Multipliers** in the Rate Method box.

- **DPE -** Multiplier that represents the Direct Personnel Expense when calculating the rate.
- **OH -** Multiplier that represents the Overhead when calculating the rate.
- **Profit -** Multiplier that represents the Profit when calculating the rate.

Non-Labor

- **Expense Group -** Expense Group associated with this project. The expense group is used in calculating the amounts.
- **Use Effort for Actuals -** When selected, non-labor transactions at the marked-up rate will be used to calculate actuals.
  Note: Expense Groups are date sensitive. Make sure that your expense group encompasses all of the time periods for which you will be scheduling/allocating.

Filter Labor Allocations & Resources By

Here you select the availability of your resources in the look-ups when entering data in Allocations and Resource Schedules. **Note:** You can only select one option.

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- **None -** There is no restriction to the Resource and Allocation that you choose. You may also use them in any combination.
  Note: If you are using Resource Group Assignments located on the Toolbar, you must have Other selected here.
- **Rate Schedule -** You are limited to the resources and their assigned Job Title (Allocation) set in the rate schedule. If there is an asterisk in the rate schedule, you will be able to enter any resource or allocation with the corresponding item. For example - in the rate schedule you create a line set to Employee - *, Job Title - Architect. In that scenario you could select any employee with a Job Type of Architect.
  Note: If the Rate schedule has a line that is Employee - * Job Title - *, then you would be able to schedule any employee with any job title.
- **Project Team Members -** You are limited to the Team Members on the Project (**Members** tab). If the **Restrict Time and Expenses to Team Members** checkbox is selected, you are limited to only employees assigned here and the associated Job Titles. If no Job Title is assigned to the employees on the **Members** tab, Unanet AE will look at their employee file for job titles available. If the **Restrict Time and Expenses to Team Members** checkbox is not selected, you get the employees on the **Members** tab as well as all other employees and their assigned Job titles in Employees (**Job Titles** tab). Employees that do not have any assigned Job Titles will not show up in the list.

Activity 1.5 – Create a New Project Plan

In this activity, you will create a new project plan.

Activity Steps

Desktop

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Select **New > Plan** menu in the header. The **Project Plan Settings** window opens.
3. Type *PN0005* in the **Code** field.
4. Type *New Building* in the **Name** field.
5. Select the **Client** lookup icon. The **Clients** window opens.
6. Double-click **POR01 City of Portland**.
7. Select **Bill** in the **Budget By Rate** field.
8. Select the **Rate Schedule** radio button in the **Rate Method** section.
9. Select the **Rate Schedule** lookup icon. The **Lookup** window opens.
10. Double-click **Standard Bill Rates**.
11. Select **Standard** in the **Expense Group** field.

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12. Select the **Save** button.

Web

1. Select **Project Central**. The **Projects** applet opens.
2. Select the **Plans** tab.
3. Select **Create New** > **Project plan from template**. The **Project plan settings** window opens.
4. Type *New Building 2* in the **New project name** field.
5. Type *PN0006* in the **New project code** field.
6. Select **Plan Template** in the **Select Template** field.
7. Select the **Create** button.

Work Breakdown Structure

All projects can have an unlimited breakdown, called the Work Breakdown Structure (WBS). You can assign names to the levels of the WBS such as phase and task. An entire WBS can be created from a template project, or portions of the WBS can be constructed from WBS templates.

When a project is first created, the top level is known as the Bill Terms Node (Project). This is the node that receives the bulk of the project information, such as who the client is, what type of project it is, etc. All nodes beneath the Bill Terms Node (Project) can have limited information entered such as contractual caps, allowable charging date ranges, budgets and rate schedules. While the Bill Terms Node (Project) is typically the top node, it can also live at the second level. This is accomplished by inserting a roll-up node above the Bill Terms Node (Project). In this way multiple Bill Terms Nodes (Projects) can be grouped together for project reporting purposes.

Charge levels are important in the setup of projects. Charge Levels need to be established for ODC, OCC and ICC charges. The setting dictates to what level of the WBS that charges can be applied. By default that level is the bill terms level. Labor can only be charged to a bottom node (a node with no children).

Unanet AE utilizes a parent/child structure to represent the relational hierarchy (tree) in a project structures. Commonly, a given project will consist of child levels often referred to as phases and tasks. Consider the following project tree.

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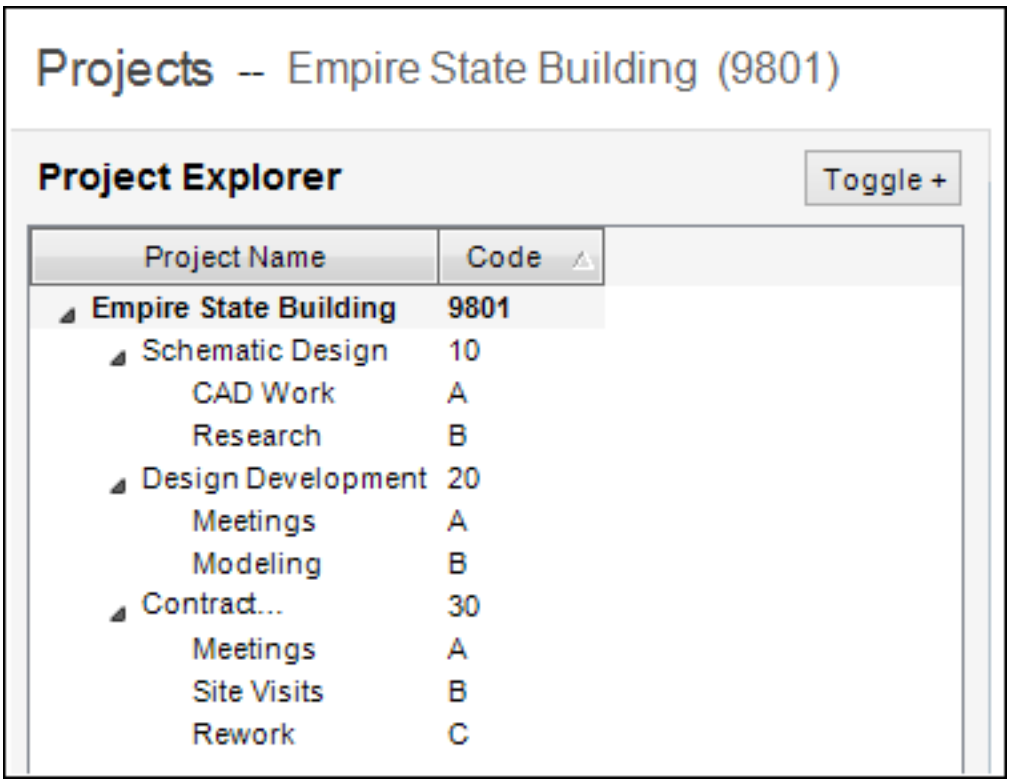

Project tree

Nodes

In the above diagram we have a project linked to three phases, each of which are linked to two or more tasks. Each item on the tree is called a node. Therefore, 9801 (typically referred to as the project code) is a node code as is 10 for phase Schematic Design.

Two other terms used in regard to trees are top nodes and bottom nodes.

- Top nodes (also known as root nodes) are level one nodes (nodes with no parent).
- Bottom nodes (also known as terminal nodes) are nodes with no children.

Nodes must be uniquely coded in respect to their immediate parent. Level one nodes must be unique to all other level one nodes.

Project Path

Since some nodes can have the same code (e.g., CAD Work and Meetings) it is necessary to refer to nodes not only by their code, but also by what branch of the tree they live on. The way Unanet A/E accomplishes this is to cite each code along the branch to the node in question.

For purposes of clarity, a separating character (also know as a delimiter) is used between each node code. This notation is called a path. An example of a path would be 9801-10-A.

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In this example, the project is Empire State Building, the phase is Schematic Design, and the task is CAD Work. A hyphen is used as the delimiter.

Parent-Child

Nodes can have parents and children. For instance, CAD Work has an immediate parent called Schematic Design but no children. Schematic Design has an immediate parent called Empire State Building and two immediate children called CAD Work and Research. The use of the word immediate means adjacent to. In other words Empire State Building is a non-immediate parent to CAD Work since it is related to CAD Work indirectly through Schematic Design.

Level

The relative position of a node to the beginning of the tree is called the level. In the above example, 9801 is on level one, phases 10, 20, and 30 are on level two. All other nodes are on level three.

Levels can be labeled so we can refer to them in real world terms such as project, phase, and task.

Project Template vs WBS Template

Project Templates and WBS Templates help expedite the creation and configuration of project records. WBS Templates are reusable project structures that can be applied to a project record. Project Templates can include project structure as well as other dimensions of project configuration such as budgets, contracts, members, billing settings, etc. A Project Template can used to create a new project in the Desktop and Web. Currently, WBS Templates are only supported in the Desktop.

Activity 1.6 – Create a WBS

In this activity, you will create a WBS.

Activity Steps

Desktop

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type *PN0005* in the **Search** field.
3. Press **Enter**. The **Project Planning** applet populates with information for **New Building**.

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4. Select the **WBS** button at the bottom of the **Project** section. This allows you to add and edit the WBS.
5. Select the **Apply WBS Template** button (next to the **WBS** button) at the bottom of the **Project** section. The **Apply WBS Template** window opens**. Note:** To add phases and tasks directly to the project individually, select the **+** icon next to the project line.
6. Select **Architectural Phases** in the **WBS Template** field.
7. Select the **Apply** button.
8. Select the **001** line.
9. Select the **Apply WBS Template** button. The **Apply WBS Template** window opens.
10. Select **Disciplines** in the **WBS Template** field.
11. Check the **Apply Template to All Nodes at This Level** check box.
12. Select the **Apply** button.
13. Select the **Data** button at the bottom of the **Project** section.

Web

Note: You cannot apply a WBS template in the web application. If you want to include a WBS template as part of the project plan, you must use the desktop application. Once the WBS is added, you will then have access to those details on the web.

Gantt Chart – Predecessor and Critical Path

Project Planning's Gantt chart allows you to plan project tasks, order of work, and gives you both detailed and summarized feedback on the impact of scheduled items. Launched from the toolbar in Project Planning, a project's schedule is displayed in an interactive Gantt chart. Gantt charts will be discussed in further detail later in this course.

Predecessors, indicated by their index numbers, are a strategic tool in project management that allows you to control the timeline of tasks within a project phase. By employing predecessors, you can synchronize the schedules of a Work Breakdown Structure (WBS). When the schedule of a predecessor is adjusted, it creates a domino effect, automatically updating the timelines of all linked tasks.

Unanet AE calculates Critical Path by taking the longest path to the end of the project. When the **Show Critical Path** checkbox is selected, the critical path is shown in red.

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Activity 1.7 – Set Predecessor Relationships

In this activity, you will set predecessor relationships.

Activity Steps

Desktop

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type *PN0005* in the **Code** field.
3. Press **Enter**. The **Project Planning** applet populates with information for **New Building**.
4. Select the **Gantt** button in the toolbar. The **Gantt** window opens.
5. Select the **Months** tab.
6. Use the information in the table below to add the **WBS** information.

Phase	Task	Duration
Pre-Design	**Civil**	4 weeks
Pre-Design	**Electrical**	4 weeks
Pre-Design	**Mechanical**	4 weeks
Pre-Design	**Structural**	4 weeks

The overall project and phase duration for the task also automatically updated. Note the green bars on the right side of the screen for the tasks you just updated. You can change the dates for each task by dragging the bars left and right. The dates are automatically updated on the left side of the screen.

7. Select the **Predecessors** cell for **Pre-Design** phase **/ Electrical** task.
8. Select the **Link information** (three dots) icon. The **Link Information** window opens.
9. Double-click **ID 3 / Civil** (the first line shown). **Note:** The number refers to the line item number in the table on the primary Gantt window.
10. Select the **OK** button.
11. Select the **Predecessors** cell for **Pre-Design** phase **/ Mechanical** task.
12. Select the **Link information** icon. The **Link Information** window opens.
13. Double-click **ID 4 / Electrical**
14. Select the **OK** button.
15. Select the **Predecessors** cell for **Pre-Design** phase **/ Structural** task.
16. Select the **Link information** icon. The **Link Information** window opens.
17. Double-click **ID 5 / Mechanical**.
18. Select the **OK** button.
19. Select the **Save & Close** button.

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Web

1. Select **Project Central**. The **Projects** applet opens.
2. Select the **Plans** tab.
3. Select the **New Building 2** project.
4. Select the **Gantt** tab.
5. Select the **Predecessors** cell for **Schematic Design / Index 3** line. The **Schematic Design Information** window opens.
6. Select the **Add** button. **Note:** You will need to click the **Add** button multiple times to view the additional lines for the other phases.
7. Select the **2 – Pre-Design (PN0006-001)** check box.
8. Select the **Save** button.
9. Use the information in the table below to assign predecessors to other phases in the project.

Phase	Predecessor	Index #
Design Development (Index line 4)	**Schematic Design**	3
Construction Documents (Index Line 5)	**Design Development**	4
Bidding/Negotiations (Index line 6)	**Construction Documents**	5
Construction Administration (Index line 7)	**Bidding / Negotiations**	6

10. Type *50* in the **Duration** column for the following phases:
    - Pre-Design
    - Schematic Design
    - Design Development
    - Construction Documents
    - Bidding/Negotiations
    - Construction Administration
11. Select the **Save** button for the project.

Basic Budget Setup

Unanet AE allows users to create project budgets using multiple methods. Budgets can be defined as explicit unit/hour and dollar values keyed into associated budget fields, or with the Project Rollup feature, the software can calculate budget numbers based on the summation of allocations or resource schedules.

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Top-Down Budgeting: You can set the budget values at the project level and they will distribute to the lowest level on the WBS.

Bottom-Up Budgeting: You can set the budget values at the lowest level and it will calculate up to the project level.

Percentages: You can assign percentages to calculate out the distribution of Hours or Dollars identified at the project level. For Instance, if you enter a percentage into the **Labor Hour %** column at each of the lowest nodes and then populate **Labor Budget Hours** field at the parent level, the system will calculate the available Labor Budget Hours for each of the lowest nodes.

When the lock icon is dark gray, you can enter percents in lower-level nodes. Click the lock icon to turn it to green, then enter a budget number at the parent level to have the numbers distributed based on the percentages. If you enter a number in a budget column on a lower level before setting the lock icon to green, the percentages will be overwritten to match the number distribution. When the lock icon is dark gray, numbers cannot be entered at the lower levels. The preceding applies to relationship between the columns **Labor Budget Hours** and **Labor Hours %**, **Labor Budget Amount** and **Labor Amount %**, **ODC Budget Amount** and **ODC Amount %**, **ICC Budget Amount** and **ICC Amount %**, and **OCC Budget Amount** and **OCC Amount %**.

Activity 1.8 – Set up a Basic Budget

In this activity, you will set up a basic budget in the **Project Planning** applet.

Activity Steps

Desktop

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type *PN0005* in the **Code** field.
3. Press **Enter**. The **Project Planning** applet populates with information for **New Building**.
4. Use the information in the table below to add the budget. The data is automatically saved.

- **Note:** Select the **–** (minus) sign next to each phase to contract the lines for easier text entry. This can be done for all nodes at a level by selecting the level under the **Show** dropdown above the project grid.
- **Note**: The column header labels shown are label override names used in this particular training environment.

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- **Note**: You may want to reorganize your columns for easier viewing. To move a column, click and drag it to the desired spot in the table.

Phase	Budget Hours	Budget Amount
New Building	Auto-populates	Auto-populates
Pre-Design	300.00	60,000.00
Schematic Design	150.00	60,000.00
Design Development	450.00	60,000.00
Construction Documents	300.00	60,000.00
Bidding/Negotiations	150.00	30,000.00
Construction Administration	150.00	30,000.00

Web

1. Select **Project Central**. The **Projects** applet opens.
2. Select the **Plans** tab.
3. Select the **New Building 2** project.
4. Select the **Budget** tab.
5. Use the information in the table below to add the Labor Budget. The data is automatically saved. **Note:** The displayed Labor Hours came from the Plan Template that was used to create the record

Phase	Labor Budget
Pre-Design	100000
Schematic Design	40000
Design Development	100000
Construction Documents	120000
Bidding/Negotiations	25000
Construction Administration	150000

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Allocations

The Allocations pane is where Project Managers define resource allocations to the WBS levels of a project. Allocations are like generic resource budgets for Job Titles and Expense Codes. They must be defined at the lowest level of the project.

Activity 1.9 – Add Allocations

In this activity, you will add allocations to set summary budgets for resources. This process can be used for all WBS items in the project.

Activity Steps

Desktop

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type *PN0005* in the **Code** field.
3. Press **Enter**. The **Project Planning** applet populates with information for **New Building**.
4. Select the **Pre-Design** phase **/ 002 Electrical** task. **Note:** If the Allocations grid is not visible, select the **up** arrow at the bottom center of the screen.
5. Hover the cursor over the **Code** field.
6. Select the **magnifying glass** next to **Add Allocation** in the **Code** cell. The **Job Titles** window opens.
7. Double-click **ARC01 Architect 1**. The rate populates. **Note:** If a rate does not populate, you must select a rate schedule in Project Plan Settings.
8. Type *40* in **Alloc Units** cell. The system will then calculate the Alloc Amount by multiplying the 40 hours by the rate from an Architect 1.
9. Select the **magnifying glass** next to **Add Allocation** in the **Code** cell for the next line. The **Job Titles** window opens.
10. Double-click **ENG1 Engineer 1**. The rate populates.
11. Type *40* in **Alloc Units** cell.

Web

1. Select **Project Central**. The **Projects** applet opens.
2. Select the **Plans** tab.
3. Select the **New Building 2** project.
4. Select the **Planning** tab.
5. Select **Pre-Design** in the WBS. A detail window opens.
6. Select the **Actions > Add Resource**.
7. Select the **ARC01 Architect 1** check box.
8. Select the **ENG1 Engineer 1** check box.

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9. Select the **Add** button. A rate will not populate until you enter a value in Allocated Hours.
10. Type *40* in the **Allocated Hours** cell for **Architect 1**.
11. Type *40* in the **Allocated Hours** cell for **Engineer 1**.

Resource Schedule

Resource Schedules allow Project Managers to spread unit and dollar budgets for resources across time. Resource Schedules can be entered into the Resource Schedule pane before or after Allocations. This allows Project Managers to schedule their allocations or use the Project Rollup feature to define Allocations from Resource Schedules. Resource Schedules are typically entered here in Project Planning per project but they can be viewed in aggregate across all projects via the Resource Scheduler applet for load balancing purposes.

To add more detail to a Project Plan, select the lowest level node from the Project pane to filter the Resource Schedule pane to the node for scheduling resources.

You can also determine if you want to schedule by Day, Week, or Month by clicking on the corresponding buttons on the Resource Schedule toolbar.

Timeline & Window Range Filter: You can slide the window view to change the date range visible for scheduling. You can expand or shrink it to focus on a specific date fame to schedule. Alternatively, you can click the Timeline button to turn off filtering so the Resource Schedule will show all dates between the Start Date and End Date on the node.

View Units/Hours, Dollars, or Both

By default, you will see units/hours columns for scheduling resources, but you can change this by clicking the small buttons in the bottom right of the Resource Schedule. Click the **u** button to show units (units/hours), the **$** button to show dollars, or the **u/$** button to see both units and dollars.

Adding a Resource

You can manually add resources one by one by typing in their Resource Code or by clicking on the magnifying glass within the Resource Code field to look up a resource.

Add Multiple Resources through Project Preferences

You can auto-fill the resources from the assigned Rate Schedule or employees associated to the project via the Project Members tab in the Projects applet.

When **Rate Schedule** is selected, resources defined in the assigned Rate Schedule will automatically populate the Resource Schedule. Either generic resources or specific employees, based on the configuration of the Rate Schedule is structured.

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Add Multiple Resources with Resource Groups

To add multiple resources at once, you can assign Resource Groups to the lowest node on the WBS.

Note: If you add a Resource Group after you have manually added resources, it will override what you had previously entered even if that resource is a part of the group. Resources Group auto-fill will only work when **Filter Labor Allocations & Resources By:** is set to None in Project Preferences.

To remove a Resource Group, you must select the Resource Group assigned at the lowest node within Resource Group Assignments screen.

Activity 1.10 – Scheduling Resources

In this activity, you will schedule resources.

Activity Steps

Desktop

Part 1: Manually Schedule an Employee

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type *PN0005* in the **Code** field.
3. Press **Enter**. The **Project Planning** applet populates with information for **New Building**.
4. Select the **Pre-Design** phase / **002 Electrical** task.
   Select the **Timeline** icon (calendar) to close the **Window Range Timeline** slider.
   Note: You may need to expand the **Resource Schedule** section on the right side of the screen.
5. Select the **Week** button in **the Resource Schedule** toolbar.
6. Select the lookup icon in the **Resource Code** field. The **Rate Schedule Employees** window opens.
7. Double-click **Casco, Lewis J**.
8. Type *40* in the **first week** cell for **LJC01**.

Part 2: Use the Wizard to Schedule an Employee

1. Select the **Wizard** icon on the **Resource Schedule** toolbar. The **Schedule By Percentage** window opens.
2. Select **Stanwyk, Gail W** in the **Employee** field.
3. Select **Architect I** in the **Job Title** field.
4. Type *20* in the **Percentage** field.
5. Select the **Schedule** button.

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Part 3: Use Auto Schedule to Schedule an Employee

1. Select the **next new line**.
2. Select the lookup icon in the **Resource Code** field. The **Rate Schedule Employees** window opens.
3. Double-click **Hartley, Sharon P**.
4. Select the **first three weekly date cells** for **Hartley, Sharon P**. The **Auto Schedule** window opens. **Note:** Press and hold the **ctrl** key to select multiple cells. The window opens when you release the **ctrl** key.
5. Type *2* in the **Hours** field. The amount will be automatically calculated based on the method selected.
6. Verify the **A** button is selected.
7. Select the **Schedule** button.

Part 4: Compare Scheduled Hours to Budgeted Hours

1. Select the **Column Chooser** icon for the **Resource Schedule** grid. The **Column Chooser** window opens.
2. Select the **Show** check boxes for the following **columns**:
   - **Labor Hours Scheduled Total**
   - **Labor Amount Scheduled Total**
3. Select the **Ok** button.
4. Select the **Refresh** icon, if necessary. The columns display.

Part 5: Schedule Using Resource Group Autofill

1. Select the **Pre-Design Phase / Structural task** in the project grid.
2. Select the **Resource Groups** button in the toolbar. The **Resource Groups Assignments** window opens.
3. Select **Task** in the **WBS Level** field.
4. Select the **Pre-Design Phase / Structural task**.
5. Select **Team A** in the **Resource Groups** field.
6. Select the **add** button.
7. Select the **Auto Fill** check box for **Team A**.
8. Select the **Close** button.
9. Select the **Refresh** button for the **Resource Scheduler**.
10. Select the **Pre-Design Phase / Structural task** in the project grid.
11. Use the table below to enter employee hours in the Resource Schedule grid.

Employee	Week 1	Week 2	Week 3
LJC01	6	6	6
GWS01	10		
TAC01	20		20

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Part 6: Add Employees Using Auto Fill From Rate Schedule

Note: This functionality requires that the **Auto Fill From Rate Schedule** setting is selected. The setting is located under **Edit > Preferences > Schedules**.

1. Navigate to **New Building > Schematic Design > Electrical**.
2. Select the **Edit** button for the **Project** grid. The **Project Plan Settings** window opens.
3. Verify the **Rate Schedule** radio button in the **Rate Method** section is selected.
4. Verify **Standard Bill Rates** displays in the **Rate Schedule** field.
5. Select the **Rate Schedule** radio button in the **Filter Labor Allocations & Resources By** section.
6. Select the **Save** button.
7. Select the **lookup** icon in the **Resource Code** field for the **ENG1** row (first row in the table). The **Rate Schedule Employees window** opens.
8. Double-click **Casco, Lewis**.
9. Select the **lookup** icon in the **Allocation Code** field for **Casco, Lewis**. The **Job Titles** window opens.
10. Double-click **ENG1**.
11. Type *40* hours in the **first date column** for **Casco, Lewis**.
12. Select the **lookup** icon in the **Resource Code** field for the **CAD01** row in the table. The **Rate Schedule Employees window** opens.
13. Double-click **Kinney, Mary L**.
14. Select the **lookup** icon in the **Allocation Code** field for **Kinney, Mary L**. The **Job Titles** window opens.
15. Double-click **CAD01**.
16. Type *40* hours in the **first date column** for **Kinney, Mary L**.

Part 7: Define Resource Allocations and WBS Budgets Using Roll Up

1. Select the **Project Rollup** icon for the **Project** grid. The **Project Rollups** window opens.
2. Select the **Allocated = Scheduled** check box.
3. Select the **Budget = Allocated** check box.
4. Select the **Rollup** button.
5. Select the **Schematic Design** line in the **Project** grid. The **Allocations** grid populates.

Web

Part 1: Automatically Schedule an Employee

1. Select **Project Central**. The **Projects** applet opens.
2. Select the **Plans** tab.
3. Select the **New Building 2** project.
4. Select the **Planning** tab.

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5. Select **Pre-Design**. **Note:** Click the rectangle in the top right of the Pre-Design section to expand the view.
6. Select the **Schedule** tab.
7. Select the **Actions > Add Resource**. The **Add Resource** window opens.
8. Select the **GJH01 Hernanadez, George J** check box.
9. Select the **Add** button.
10. Select **Actions > Auto Schedule**. The **Auto Schedule** window opens.
11. Select **Set hours per day** in the **How do you want to schedule?** field.
12. Select **2** in the **How many hours?** field.
13. Select the **Hernanadez, George J** check box.
14. Select the **Schedule** button.

Note: Labor hours schedule and labor amount scheduled display in the table in the Scheduled hours cell. Both number of hours and total cost are visible.

Part 2: Manually schedule an employee

1. Select **Actions > Add Resource**. The **Add Resource** window opens.
2. Select the arrow next to the **LJC01 Casco, Lewis J** check box.
3. Select the check box of the line with **Engineer I** as **Casco, Lewis J**'s Job Title.
4. Select the **Add** button.
5. Select the **Weeks** button.
6. Type *40* in the **first weekly date** cell.
7. Hover the cursor over the bottom right corner of the **first weekly date** cell.
8. Click and drag the cursor to the **third weekly date** cell. The hours automatically fill in for all selected weeks.

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Budgeting

In previous activities, you entered values for hours and dollar amounts into the WBS level but you can also populate WBS hour and dollar amount budgets as summations of allocations and resource schedules.

Activity 1.11 – Budget Expenses

In this activity, you will enter allocations for expenses and create budget values from them.

Activity Steps

Desktop

Part 1: Update Budgets for Other Direct Charges (ODC)

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type *PN0005* in the **Code** field.
3. Press **Enter**. The **Project Planning** applet populates with information for **New Building**.
4. Select the **ODC** tab in the **Planning Mode** section of the toolbar.
5. Select the **Column Chooser** icon for the **Project** grid. The **Column Chooser** window opens.
6. Select the **Show** check box for the **ODC Budget Amount** column.
7. Select the **Ok** button.
8. Select **Pre-Design** phase / **Electrical 002** task. **Note:** If the Allocations grid is not visible, select the **up** arrow at the bottom center of the screen.
9. Select the **magnifying glass** next to **Add Allocation** in the **Code** cell. The **Expense Group Codes** window opens. **Note:** Hover the cursor over the **Code** field in the **Allocations** grid to reveal the magnifying glass.
10. Double-click **001 Lodging**.
11. Enter *400* in the **Allocation Amount** field.
12. Select the **Code** lookup icon for the next line. The **Expense Group Codes** window opens.
13. Double-click **003 Meals**.
14. Enter *100* in the **Allocation Amount** field.
15. Select the **Project Rollup** icon for the **Project** grid. The **Project Rollups** window opens.
16. Select the **Budget = Allocated** check box.
17. Select the **Rollup** button. The **Project** grid updates with budget values.

Part 2: Update Budgets for Out-of-Contract Consultant (OCC) Resources

1. Select the **OCC** tab in the **Planning Mode** section of the toolbar.

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2. Select the **Column Chooser** icon for the **Project** grid. The **Column Chooser** window opens.
3. Select the **Show** check box for the **OCC Budget Amount** column.
4. Select the **Ok** button.
5. Select the **Timeline** icon (calendar) to close the **Window Range Timeline** slider, if necessary.
6. Select the **u/$** icon in the bottom right corner of the **Resource Schedule** pane.
7. Select the **Resource Code** lookup icon in the **Resource Schedule** grid. The **Vendors Lookup** opens.
8. Double-click **JS Creative Group**.
9. Select the **Allocation Code** lookup icon. The **Expense Group Codes** window opens.
10. Double-click **008 Consultant**.
11. Use the information in the table below to add budget values.

    Note: Record these dates for use in later activities.

Resource	1st weekly cell (dollars)	2nd weekly cell (dollars)	3rd weekly cell (dollars)
JS Creative Group	1000	1000	1000

12. Select the **Resource Code** lookup icon for the next line. The **Vendor Lookup** opens.
13. Double-click **Coastal Electrical**.
14. Select the **Allocation Code** lookup icon.
15. Double-click **008 Consultant**.
16. Use the information in the table below to add budget values.

Resource	1st weekly cell (dollars)	2nd weekly cell (dollars)	3rd weekly cell (dollars)
Coastal Electric	5000		

17. Select the **Project Rollup** icon for the **Project** grid. The **Project Rollups** window opens.
18. Select the **Allocated = Scheduled** check box.
19. Select the **Budget = Allocated** check box.
20. Select the **Rollup** button. The **Project** and **Allocations** grids update.

Web

Part 1: Adjust planning preferences

1. Select **Project Central**. The **Projects** applet opens.
2. Select the **Plans** tab.
3. Select the **New Building 2** project.
4. Select the **Planning** tab.

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5. Select **Edit > Planning Preferences**. The **Planning preferences** window opens.
6. Select the **Schedules** tab.
7. Clear the **Auto calculate dollars from hours/units** check box.
8. Select the **Save** button.

Part 2: Add Allocations to Other Direct Charges (ODC)

1. Select **Schematic Design**. Additional details display.
2. Select the **ODC** button.
3. Select the **Allocate** tab.
4. Select **Actions > Add Resource**. The **Add resource** window opens.
5. Select the **001 Lodging** check box.
6. Select the **Add** button.
7. Type *400* in the **Allocated amount** field for **Lodging**.

Part 3: Schedule Out-of-Contract Consultant (OCC) Resources

1. Select the **OCC** button.
2. Select the **Schedule** tab.
3. Select **Actions > Add Resource**. The **Add resource** window opens.
4. Select the **COE01 Coastal Electric** check box.
5. Select the **Add** button.
6. Select **Amount** in the **Schedule with** field.
7. Select the **Change Expense Types** down arrow for **Coastal Electric**. The **Change expense types** window opens.
8. Select the **008 Consultant** radio button.
9. Select the **Add** button.
10. Type *5000* in the <**first weekly cell>** for **Coastal Electric**.

Part 4: Reset planning preferences

1. Select **Edit > Planning Preferences**. The **Planning preferences** window opens.
2. Select the **Schedules** tab.
3. Select the **Auto calculate dollars from hours/units** check box.
4. Select the **Save** button.

Project Type

Charge Type determines the type of project. There are five types of projects in UAE. The choice affects the chargeable nature of the project.

- **Billable -** Billable projects that can be invoiced and require a client.
- **Indirect -** Indirect projects that are overhead projects. They can be charged to but, never invoiced.
- **Projection -** A Projection cannot receive charges. Projections are used to record estimated revenue for future endeavors. Projects can always change their type.

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- **Opportunity -** Opportunities are similar to indirect projects. However, they are client-related, and charges can be placed on hold. If an opportunity becomes a billable project, the charges on hold can then be either billed or written off.
- **Plan -** Plans cannot receive charges. Plans only exist for the purpose of project planning.

Activity 1.12 – Change Charge Type

In this activity, you change the charge type from plan to billable.

Activity Steps

Desktop

1. Navigate to **Project Administration > Projects**. The **Projects** applet opens.
2. Type *PN0005* in the **Search** field.
3. Press **Enter**. The **Project** applet populates with information for **New Building**.
4. Select **Billable** in the **Charge Type** field.
5. Select the **Save** button.
6. Type *PN0006* in the **Search** field.
7. Press **Enter**. The **Project** applet populates with information for **New Building 2**.
8. Select **Billable** in the **Charge Type** field.
9. Select **Back Cove Trail Systems** in the **Client** field.
10. Select the **Save** button.

Scheduled Projects

The Add Scheduled Projects tool on an employee timesheet displays a distinct list of scheduled projects based on the supplied date range. The employee checks off which projects to apply to the current time sheets.

Activity 1.13 – Add Scheduled Projects to Time Sheet

In this activity, add scheduled projects to a time sheet.

Activity Steps

Desktop

1. Navigate to **Personal > Time Sheets**. The **Time Sheet** applet opens.
2. Select the **Add Scheduled Projects** link. The **Scheduled Projects** window opens.
3. Select the **<date range>** used to schedule resources in **Activity 1.11, Part 2 step 11**. **Note:** The dates do not need to be exact, just ensure the range you select includes the dates used in the prior activity.

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4. Select the **PN0005-001-002** check box.
5. Select the **Add Selected Projects** button. The PN0005 project displays on the timesheet.
6. Type *8* in the **Monday, Tuesday, and Wednesday** columns for the **PN005** project.
7. Select the **Save** button.

Web

1. Select **Personal > Time**. The **Timesheet** applet opens.
2. Select the **Add** button. The **Add** window opens.
3. Select the **Scheduled Projects** radio button.
4. Select the **<date range>** used to schedule resources in **Activity 1.11, Part 2 step 11**.
5. Select the **New Building – Pre-Design - Electrical** check box.
6. Select the **Add** button.
7. Type *8* in **Thursday and Friday** columns for the **New Building** project.
8. Select the **Save** button.

Reporting

Unanet A/E gives you access to several reporting options that supplement your business processes. Below is a list of Planning reports.

- Project Figures
  - UT > Custom Reports
  - Run in Project Planning > Toolbar- View
  - Drill down report that shows as of the Moment project metrics for a given project to all its WBS levels. It automatically filters based on project leader's designation. Employees with a designation of Project Accountant can see all projects.
- Project Planning
  - UT > Report Management
  - Run in Project Planning > Toolbar- Print
  - This report compares budget versus actual for labor, expenses, and consultants on a Project for a specific date range. There is a high level view as well as detailed, showing Allocated and Scheduled broken down by node.
- Project Scorecard
  - UT > Custom Reports
  - Project Scorecard Report offers chart output and metrics focusing on multipliers plus backlog calculations based on both contract backlog and budget backlog. This report supports project roles.
- Budget Backlog

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    - UT > Custom Reports
    - Compares budget amount to billed revenue plus effort with a billing status of R or H.
- Project Plan
    - PM > PM Reports
    - Budgetary information summarized at the allocation level (Job Title for Labor; Expense Code for Non-Labor) derived from project Planning.
- Project Budget Analysis (Bill Amount)
    - PM > Project Reports
    - This report compares Project budget amount to Project actuals at the billable rate (effort).

Activity 1.14 – Run Project Planning Reports

In this activity, you will run project planning reports.

Activity Steps

Desktop

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type *PN0005* in the **Code** field.
3. Press **Enter**. The **Project Planning** applet populates with information for **New Building**.
4. Select the **Print** button. The **Project Planning** window opens.
5. Select the **<date range>** used to schedule resources in **Activity 1.11, Part 2 step 11**. **Note:** The dates do not need to be exact, just ensure the range you select includes the dates used in the prior activity.
6. Select the **OK** button. The report displays. This format can easily be exported to Excel.

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Check Your Understanding

At what project level must allocations be assigned?

a) Lowest project level
b) Highest project level
c) Any project level

Which of the following statements are true? Select all that apply.

a) Project Templates are reusable project structures that can be applied to a project record.
b) WBS Templates can include project structure as well as other dimensions of project configuration such as budgets, contracts, members, billing settings, etc.
c) WBS Templates are reusable project structures that can be applied to a project record.
d) Project Templates can include project structure as well as other dimensions of project configuration such as budgets, contracts, members, billing settings, etc.

The purpose of a resource group is to quickly add multiple resources to a plan.

a) True
b) False

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

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LESSON 2: OVERSEEING PLANS AND SCHEDULES

Learning Objectives

Summarize how to oversee project plans and schedules in Unanet AE.

- Summarize how to use and edit settings for Gantt charts.
- Explain how to use the resources for scheduling.
- Summarize how to run reports for monitoring project plans.

Gantt Charts

Project Planning's Gantt chart allows you to plan project tasks, order of work, and gives you both detailed and summarized feedback on the impact of scheduled items. Launched from the toolbar in Project Planning, a project's schedule is displayed in an interactive Gantt chart.

Additionally, Gantt chart can control the timeframe in which you can schedule resources in Project Planning. Dates can be changed manually in the date columns in the grid immediately to the left of the chart.

Gantt Chart Steps

- Select a View Option.
- Schedule the WBS beginning with start dates.
- Add finish dates by increasing/decreasing duration or adding a static finish date.
- Use Predecessors (description below) to link WBS nodes together for ordered/hierarch scheduling.
- Adjust schedules using the WBS Grid or by dragging the Gantt bars displayed on the Gantt chart.

Gantt Item Descriptions

View Options

The Gantt chart can be viewed in units of Days, Weeks, Months, Quarters, or Years. Change the view by clicking the corresponding button. When viewing in Days or Weeks, the current date is highlighted on the chart.

WBS Grid

The WBS Grid displays the project structure and associated planning. Each node can be scheduled and ordered using the fields contained in the grid.

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Grid Descriptions

- **Index -** Index of the project node, primarily used for assigning predecessors (see below).
- **WBS -** Project Path (read only).
- **Name -** Project Name (read only).
- **Duration -** Increase or decrease the amount of time allotted to a project node in increments of days or weeks (based on the selected view option). This updates associated finish dates and Gantt Bars. Project level duration is summarized and reflected in the number of planned days, start to finish.
- **Start -** Planned start date.
- **Finish -** Planned end date.
- **Predecessors -** Indicated by the Index number, predecessors allows you to control, for instance, the schedules for a list of tasks underneath a project phase. Using a predecessor, you can effectively lock the schedules of a WBS together. Rescheduling the predecessor has a ripple effect on the schedules of the linked nodes.

  The nature of the relationship between a predecessor task and a successor task determines the type of task dependency to use. This relationship can be defined by typing the following codes into the Predecessors column prefixed by the Index ID (e.g., 2FS):

  - **FS (Finish-to-Start) -** Task A must finish before Task B can start. This is very commonly used and the default dependency created if only an Index ID is entered into the Predecessors column.
  - **SS (Start-to-Start) -** Task B can't start until Task A starts. Task B can begin any time after Task A begins. This method can be beneficial as it can help reduce the overall duration of the project as it allows for task overlap.
  - **FF (Finish-to-Finish) -** Task B can't finish until Task A is done. They don't have to end at the same time. Task B can end any time after Task A ends. Similar to SS, FF dependencies can also reduce the overall duration of a project.
  - **SF (Start-to-Finish) -** Task B cannot finish until the start of Task A. This is a very rare scenario of Task in any type of project.

Chart

The chart is reactive to the view options and the WBS Grid settings and displays two types of bars: Gantt bars and a Summary bar.

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Gantt Bars
Gantt bars (blue) reflect the settings of the associated project node listed in the WBS chart. Gantt Bars can be moved by editing the WBS chart or by clicking and dragging the Gantt bar. This will adjust any associated schedules. You can alter the duration (and subsequently start and end dates) of a task by gripping the left or right edge of the Gantt bar and increasing or decreasing its length.

Summary Bar
The summary bar shows a running total of the time represented by all scheduled tasks. While Gantt bars can be edited, the Summary bar is Read Only.

Other Options

- **Print -** Launches print preview for content of the Gantt Chart and WBS Grid.
- **Automatically move Schedules with Start Date -** When checked, Start Dates are impacted when sliding Gantt Bars.
- **Save -** Saves Gantt information.
- **Save & Close -** Saves Gantt information and closes the Gantt window.
- **Close -** Closes the Gantt window without saving.

Activity 2.1 – Work with a Gantt Chart

In this activity, you will work with a Gantt chart.

Activity Steps

Desktop

Part 1: Input Task Duration

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type *PN0005* in the **Code** field.
3. Press **Enter**. The **Project Planning** applet populates with information for **New Building**.
4. Select the **Gantt** button in the toolbar. The **Gantt** window opens.
5. Use the information in the table below to add the **WBS** information.

Phase	Task	Duration
Schematic Design	**Civil**	3 weeks
Schematic Design	**Electrical**	3 weeks
Schematic Design	**Mechanical**	3 weeks

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Schematic Design	**Structural**	3 weeks

The overall project and phase duration for the task also automatically updated. Note the green bars on the right side of the screen for the tasks you just updated. You can change the dates for each task by dragging the bars left and right. The dates are automatically updated on the left side of the screen.

Part 2: Work with dates

1. Hover the cursor over the **Schematic Design / Civil** task bar until the cursor changes to four arrows.
2. Click and hold to drag a line from the end of the **Civil** task bar to the start of the **Electrical** task bar.
3. Double-click the **Schematic Design / Mechanical** task bar. The **Link Information** window opens.
4. Double-click ID **9** (Electrical).
5. Select the **Save and Close** button.

Web

1. Select **Project Central**. The **Projects** applet opens.
2. Select the **New Building** project.
3. Select the **Gantt** tab.
4. Select the **Months** tab.
5. Hover the cursor over the **Schematic Design/Mechanical** task bar until the hand displays.
6. Click and hold to drag a line from the end of the **Schematic Design / Mechanical** task bar to the start of the **Schematic Design / Structural** task bar.
7. Select **Options** button.
8. Select the **Show Critical Path** check box.
9. Select the **Save** button.

Schedules

The Resource Scheduler gives the Project Manager the ability to schedule employees' time on a project.

Key Concepts

- By using the filters, the Project Manager can schedule all or individual employees to certain projects for any given time.
- When viewing the Employees tab, the grid displays in colors to give you a "Heat Map" to warn you about overscheduling. A legend is at the bottom of the applet.

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The Resource Scheduler screen has three windows; Employee & Project Tabs (top), WBS Tab (middle) and a Filters tab (bottom). The top displays the summary of hours scheduled, the middle shows the detail, and the bottom displays the filter options.

Note: You can left-click and hold on the blue header strip on the WBS & Filter sections of the window to "un-dock" them. To return them to their original locations, simply double-click on the blue header strip.

Field Descriptions

Employees Grid (top grid)

- **Employee -** Name of the employee.
- **Date Columns -** Number of hours the employee has been scheduled for the specified time frame.

- **Projects Grid (top grid)**
  - **Project -** Name of the project.
  - **Project Code -** Code of the project.
  - **Date Columns -** Number of hours the project has been scheduled for the specified time frame.
- **Work Breakdown Grid (middle grid)**
  When you click on a cell containing a number on either of the top grids, the Work Breakdown grid will display the detail of that number.
  - **Project -** Path of the project.
  - **Project Name -** Long name of the project.
  - **Employee Code -** Code of the employee
  - **Employee Name -** Name of the employee.
  - **Job Title Code -** Code of the job title.
  - **Job Title Name -** Name of the job title.
  - **Hours -** Total of the hours for the line item.
- **Filters Grid**
  - **View Dates**
    - **Start Date -** Starting date for schedules to evaluate.
    - **For -** Number of Date View units that the top grid will look forward.
    - **Date View -** Block of time that the top grid will look forward. Options are Days, Weeks Months Calendar Weeks, and Calendar Months.
    - **Hours Per Day Between -** Allows you to specify the number of hours that can be scheduled per day.
    - **Group Detail -** When checked, the Work Breakdown section groups the line items by removing the transaction date.
    - **Planning Preferences -** When selected, the project Planning Preferences screen will appear.
  - **Employee Info**

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        - Employee - When selected, only information for the specific employee is displayed.
        - **Job Title -** When selected, only information for the specific job title is displayed.
        - **Home Org -** When selected, only information for the specific home organization is displayed. This is set at **Employees > Employee Information**.
        - **Code / Level -** When entered / selected, only information for the specified org code / level is displayed
        - **Resource Group -** When selected, only information for the specified resource group is displayed
        - **Always Show Generic -** When selected, the Employees grid will show all of the generic hours at the top of the grid.
    - **Project Info**
        - **Charge Type -** When selected, only project information for the specific charge type is displayed.
        - **Status -** When selected, only project information with the specific status is displayed.
        - **Client -** When selected, only information for the specific client is displayed.
        - **Org. -** When selected, only information for the specific home organization is displayed. This is set at **Projects > Members** Tab.
    - **Project Leaders**
        - **Project Manager -** When selected, only information for the specific project manager is displayed.
        - **Project Accountant -** When selected, only information for the specific project accountant is displayed.
        - **Principal In Charge -** When selected, only information for the specific principal in charge is displayed.
    - **Project UDFs**
        - **UDF Field** - Drop-down includes any Project UDFs.
        - **Operator -** Choices are =, <>, >, <, >=, <=, between, and is not null. Is not null is synonymous with a blank or empty field.
            - **Value 1 -** Used with all filter operators except is not null. This is the value that completes the filter operation (except in the case of the between operator). In the case of the between this represents the lower range.
            - **Value 2 -** Used only with the between operator. This represents the upper range.
            - **And/Or -** Gives you the option of filtering using an And statement or an Or statement.

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- **Legend**
  - **Legend -** Color-coded legend used to show the user if the schedule is properly structured (i.e., balanced, over-scheduled, etc.).

Activity 2.2 – Use the Resource Scheduler

In this activity, you will use the resource scheduler.

Activity Steps

Desktop

1. Navigate to **Project Management > Resource Scheduler**. The **Resource Scheduler** applet opens.
2. Select the **Filters** tab at the bottom of the screen.
3. Select the **<date used in activity 1.11, part 2, step 11>** in the **Start** field.
4. Select the **Load Schedules** button.
5. Select the **Projects** tab.
6. Select the **<first date cell with hours scheduled> for New Building**.
7. Select the **Work Breakdown** tab at the bottom of the screen.
8. Select **Enter New Line**.
9. Select the **down** arrow in the cell.
10. Select **PN0005-001-002**. This is the second item on the drop-down list.
11. Select the **Lookup** icon in the **Employee Code** field. The **Rate Schedule Employees** window opens.
12. Double-click **Stanwyk, Gail W**.
13. Type *8* in the **Hours** field.
14. Select the **Save** button.
15. Select the **Employees** tab.
16. Select the **cell** in the **first date column** for **Fletcher, Erwin P**.
17. Select the **Work Breakdown** tab at the bottom of the screen.
18. Type *8* in the **Hours** field.
19. Select the **Lookup** icon in the **Project** field. The **Projects** window opens.
20. Type *New Building*.
21. Select the **Search** button.
22. Double-click **003-001 Design Development**.
23. Select the **Lookup** icon in the **Job Title Code** field. The **Job Titles** window opens.
24. Double-click **CAD01**.
25. Select the **Save** button.

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Web

Part 1: Reassign hours on Employee tab

1. Select **Resource Scheduler**. The **Resource Scheduler** applet opens.
2. Select the **<date used in activity 1.11, part 2, step 11>** in the **Start Date** field.
3. Select the **three dots** icon for **Hernandez, George J**.
4. Select **View all editable rows**.
5. Type *40* in the second cell for the **Surveyor 1** row in the **New Building 2** project **Pre-Design** phase.
6. Select the **three dots** icon for the **Surveyor 1** row in the **New Building 2** project **Pre-Design** phase.
7. Select **Reassign hours**. The **Reassign hours** window opens.
8. Select the **TAC01 Cruz, Theresa A**. radio button.
9. Select the **Reassign** button. The hours have moved from George to Theresa.
10. Select the **Add project** button. The **Add project** window opens.
11. Select the **arrow** to expand **Back Cove Pedestrian Bridge**.
12. Select the **Pre-Design** check box.
13. Select the **MLK01 Kinney, Mary L.** check box.
14. Select the **Save** button.
15. Type *40* in the second cell for **Mary Kinney** for the **Surveyor II** row in the **Back Cove Pedestrian Bridge** project **Pre-Design** phase.

Part 2: Reassign Hours on Projects tab

1. Select the **Projects** tab.
2. Select the **three dots** icon for **Back Cove Pedestrian Bridge**.
3. Select **View all editable rows**.
4. Select the **three dots** icon for **Surveyor II** under **Kinney, Mary L**.
5. Select **Reassign hours**. The **Reassign hours** window opens.
6. Select the **RDW01 Wilson, Richard D.** radio button.
7. Select the **Reassign** button. The hours have moved from Mary to Richard.
8. Select the **three dots** icon for **Wilson, Richard D**.
9. Select **Add job title**. The **Add job title** window opens.
10. Select the **ACT01** radio button.
11. Select the **Add** button.
12. Select the **Add employee** button. The **Add employee** window opens.
13. Select the **RDW01 Wilson, Richard D.** check box.
14. Select **Baseball Stadium > Pre-Design > Civil**.
15. Select the **Meetings** check box.
16. Select the **Design** check box.
17. Select the **Save** button.
18. Type *40* in the first cell for the **Baseball Stadium > Pre-Design > Civil > Meetings > Wilson, Richard D. > Accountant II**.
19. Type *40* in the second cell for the **Baseball Stadium > Pre-Design > Civil > Design > Wilson, Richard D. > Accountant II**.

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20. Select the **Filter** icon. The **Filters** window opens.
21. Select **Fletcher, Erwin P** in the **Project Manager** field.
22. Select the **Save** button.

Reporting

The Project Figures report returns "As of the Moment" project metrics for a given project to all its WBS levels. It automatically filters based on project leader designation. Employees with the designation of Project Accountant can see all projects. By default, this report shows labor cost as zero.

On this report, any figure, that is cased in blue and has an underline, will render a new detail report. When the Project Figures report is selected, a blue back-arrow will appear in the Report Viewer tool bar when a drill-through report has been entered. Clicking the back arrow will navigate back to the master report. The Project Figures report is accessible on the tool bar (View) in the Project Administration module (Projects applet) and the Project Management module (Project Planning applet). A permission under Project Management called View Labor Cost in Project Figures determines whether a person can see labor costs on this report.

Note:

- This report honors Project Roles filtering.

- The Project Figures report is "All Time," so be aware of that when comparing data to reports that use a Date Range or As-of-Date.

Activity 2.3 – Run Reports for Monitoring Project Plans

In this activity, you will run a report used to monitor a project plan. **Note:** You must have been granted access to Custom Reports.

Activity Steps

Part 1: Run Project Figures Report

1. Navigate to **Project Management > Reports > Project Figures**. The **Project Figures** window opens.
2. Select **New Building** in the **Project** field.
3. Select the **Print** button. The **Project Figures** report displays. **Note:** To drill into the report, select any of the hyperlinks to view details. To return to the parent report, select the **Back** arrow at the top of the screen.

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Part 2: Run PM Reports

1. Navigate to **Project Management > Reports > PM Reports**. The **Reports** window opens.
2. Select **Project Plan** in the text field.
3. Select the **Run** button. The **Print Criteria** window opens.
4. Verify that **<today's date>** displays in the second **Current** field.
5. Select the **Billable** check box in the **Charge Types** section.
6. Select the **Print** button. The **Project Plan** report displays.

   Note: This same process can be repeated for any report in the drop-down menu in the **Reports** applet.

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Check Your Understanding

The Project Figures report returns "As of the Moment" project metrics for a given project to all its WBS levels.

a) True
b) False

Which predecessor/successor relationship is described in this statement: Task B can't finish until Task A is done. They don't have to end at the same time. Task B can end any time after Task A ends.

a) FS (Finish-to-Start)
b) SS (Start-to-Start)
c) FF (Finish-to-Finish)
d) SF (Start-to-Finish)

When using the Desktop Resource Scheduler, which tab contains a “heat map” to warn of overscheduling?

a) Project
b) Employee
c) Schedule
d) Filters

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

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LESSON 3: PROJECT MONITORING

Learning Objectives

Identify ways to monitor a project.

- Recall how to update budgets.
- Explain how to use rate schedule periods in project planning.
- Summarize how to view percent complete history.

Budget Changes

The **Project Planning** applet brokers the process of submitting and approving change orders. Unless the special permission Edit Budgets on All Project Types has been granted, change orders are required to modify the budget of projects with the Charge Type Billable or Indirect projects. This is not necessary for projects with the Charge Type of Plan.

The **Change Order** screen allows for the separation of entering and approving change orders. Project Managers can then enter change order requests while requiring approval from someone else.

A special permission, Approve Change Orders, controls the ability to commit change orders. Permissions are granted via **Administration > Permissions**.

Activity 3.1 – Update Budgets

In this activity, you will update the budget.

Activity Steps

Part 1: Create a Change Order

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type *PN0005* in the **Code** field.
3. Press **Enter**. The **Project Planning** applet populates with information for **New Building**.
4. Select **Change Order > Request Change Order**. The **New Change Order** window opens.
5. Type *10* in the **Labor Hrs** field for **PN0005-001-001 Civil** (first line).
6. Select the **Save** button.

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7. Select **Change Order > View Change Orders**. The **Change Order**s window opens.
8. Double-click on the **Change** order. The **Update Change Order**s window opens.
9. Select the **Approve** button. A confirmation message displays. **Note:** You must be an administrator to see this option.
10. Select the **Yes** button.
11. Select the **X** button to close the **Change Orders** window.
12. Select the **WBS** button.
13. Select the **Code** column for **001 Civil**.
14. Type *005* in the **Code** field.
15. Type *Add Service* in the **Name** field.

Part 2: Run change order report

1. Navigate to **Utilities > Custom Reports**. The **Custom Reports** applet opens.
2. Verify **All** is selected in the **System** field.
3. Verify **All** is selected in the **Type** field.
4. Type *Change Orders* in the **Name** field. The list of reports filters.
5. Double-click **Change Orders**.
6. Select the **Modules/Applets** tab.
7. Select the **Project Management** check box.
8. Select the **Permissions** tab.
9. Verify that the **Administrator** check box is selected.
10. Select the **Save** button.
11. Navigate to **Project Management > Change Orders**. The **Change Orders** window opens.
12. Select the **Print** button.

Rate Schedules

Unanet AE's Rate Schedules applet allows users to assign rates based on job title or to a specific employee, or both. A single rate schedule can support multiple time periods and can be updated as needed based on scheduled rate increases/changes without having to create a new rate schedule. Rate schedules are date sensitive, so the planned rate changes can be scheduled so that timesheet entries made before the change will apply previous rates and timesheet entries made after the change will apply the new rates. These rate schedules can then be assigned to a project or even specific nodes within the project. The rates in a rate schedule will supersede those found in the employee's record. In the absence of a rate schedule, the rate will not populate automatically when performing project planning. Using a rate schedule saves time in the project planning stage and allows for more accurate and flexible cost estimation and resource allocation.

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Activity 3.2 – Use Rate Schedule Periods for Project Planning

In this activity, you will use a rate schedule period in a project plan.

Activity Steps

Part 1: View/Edit Rate Schedules

1. Navigate to **Project Administration > Rate Schedules**. The **Rate Schedules** applet opens.
2. Select the **Lookup** icon in the **Search** field. The **Find: Rate Schedules** window opens.
3. Double-click **Standard Bill Rates**.
4. Select the **Add Period** button.
5. Verify that **<today's date>** displays the **Enter the new effective date** field.
6. Select the **OK** button.
7. Double-click **ARC02**. The **Rate Editor** window opens.
8. Type *210* in the **Regular** field.
9. Type *315* in the **Premium** field.
10. Select the **Save** button.
11. Select the **Add Rate** button. The **Rate Editor** window opens.
12. Select the **Lookup** icon in the **Employee** field. The **Employee Lookup** window opens.
13. Double-click **GJH01 Hernandez, Geoge J**.
14. Select the **Use Flat Rates** check box.
15. Type *150* in the **Regular** field.
16. Type *225* in the **Premium** field.
17. Select the **Save** button.
18. Select the **Add Rate** button. The **Rate Editor** window opens.
19. Select the **Lookup** icon in the **Employee** field. The **Employee Lookup** window opens.
20. Double-click **TAC01 Cruz, Theresa A**.
21. Select the **Lookup** icon in the **Job Title** field. The **Job Title Lookup** window opens.
22. Double-click **ADM01, Admin**.
23. Select the **Use Flat Rates** check box.
24. Type *75* in the **Regular** field.
25. Type *75* in the **Premium** field.
26. Select the **Save** button.

Part 2: Select Rate Schedule

1. Navigate to **Project Administration > Projects**. The **Projects** applet opens.
2. Type *PN0005* in the **Code** field.
3. Press **Enter**. The **Projects** applet populates with information for **New Building**.

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4. Right-click **PN0005** in the **Project Explorer** section.
5. Select **Rate Schedules**. The **Rate Schedules** window opens.
6. Select **PN0005-001**. **Note:** A Rate Schedule can be assigned at any level of the WBS. Any node in the WBS without a specified Rate Schedule will default to the Rate Schedule assigned to the node above them (I.e.: a task with no Rate Schedule will default to the Rate Schedule assigned to the phase and a phase without a rate schedule will default to the Rate Schedule assigned to the project.)
7. Select the **Use Rate Schedule** radio button in the **Bill Rate** section.
8. Select the **Lookup** icon in the **first** field. The **Find: Rate Schedules** window opens.
9. Double-click **Standard Bill Rates**.
10. Select the **Save and Close** button.

Part 3: Use the Rate Tester

1. Navigate to **Utilities > Rate Tester**. The **Rate Tester** applet opens.
2. Select the **Lookup** icon in the **Project Path** field. The **Project Search** window opens.
3. Select **PN0005 New Building**.
4. Double-click **001-002 (Pre-Design / Electrical)**.
5. Select the **Lookup** icon in the **Employee** field. The **Employee Lookup** window opens.
6. Double-click **TAC01 Cruz, Theresa A**.
7. Select the **Lookup** icon in the **Job Title** field. The **Job Title Lookup** window opens.
8. Double-click **ADM01, Admin**.
9. Enter *<Today's Date plus 2 weeks>* in the **Work Date** field.
10. Select the **Get Rates** button. The rates display. Note the $75 rate for Bill Rate.
11. Enter *<Today's Date minus 2 weeks>* in the **Work Date** field).
12. Select the **Get Rates** button. The rates display. Note the $200 rate for Bill Rate. This reflects the older bill rate prior to the date and rate set in part 1.

Earned Value Tracking

Earned Value is a project management technique used to measure the progress and performance of a project. It helps compare the actual work completed and costs incurred to the planned work and costs. This allows project managers to assess if the project is on track, behind schedule, or over budget.

In Unanet AE, the Earned Value feature is used to track and analyze project performance. Here are the general steps to use the Earned Value feature in Unanet AE:

1. Enter the budgets (or for more detail, enter resource schedules) for a project. Once budgets are configured, saving the baseline can allow you to compare baseline (Budget (PV)) to current (Budget Current).

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2. Enter the percent complete history for each WBS node of the project. This is a "best guess" value of completion at a specific moment in time. You can enter the percent complete history in the **Percent Complete History** window.
3. With budget values and percent complete history entered; you can access the Earned Value window to display this information in a chart. This screen provides various metrics and indicators to assess project performance, such as Planned Value (PV), Earned Value (EV), Actual Cost (AC), Cost Variance (CV), and Cost Performance Index (CPI). The Earned Value window defaults to
4. Use the information in the Earned Value screen to analyze the project's progress and performance. For example, if the Earned Value is higher than the Planned Value, it indicates that the project is ahead of schedule. If the Cost Variance is negative, it means that the project is over budget.

By regularly monitoring and analyzing the Earned Value metrics in Unanet AE, project managers can make informed decisions and take corrective actions to keep the project on track and within budget.

In Unanet AE, Earned Value can be defined by direct data entry into the Percent Complete History window, or via an automatic calculation launched from Project Rollups.

Project Rollups Utility (Percent Complete History)

The Percent Complete History-Rollup feature uses the **As of Date** of the Timeline slider window (Resource Schedule pane) or the current date if the Timeline is hidden, as the effective date to calculate the scheduled hours remaining and subsequently the percent complete (see image below). The effective date is inserted into the Percent Complete History grid as the Date.

The Percent Complete History Calculation used by the Project Rollup Utility is *Budgeted Hours minus Scheduled Hours Remaining*. Since this feature uses scheduled hours you must have resource schedules defined on the project to produce a precent complete value.

Note: If you rollup the values incorrectly due to inaccurate resource schedules, you will need to manually delete them in the **Percent Complete History** window, launched from the toolbar.

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Activity 3.3 – Work with Earned Value and Percent Complete

In this activity, you will enter percent complete for earned value management.

Activity Steps

Desktop

1. Navigate to **Project Management > Project Planning**. The **Project Planning** applet opens.
2. Type *PN0005* in the **Code** field.
3. Press **Enter**. The **Project Planning** applet populates with information for **New Building**.
4. Select the **Earned Value** button in the toolbar. The **Earned Value** window opens.
5. Select **New Building > Pre-Design > Electrical**.
6. Select the **Include ODC** check box.
7. Select the **X** to close the **Earned Value** window.
8. Select **% Percent Complete History** button in the toolbar. The **% Percent Complete History** window opens.
9. Select **New Building > Pre-Design > Electrical**.
10. Verify that **<Today's Date>** displays in the **Date** cell.
11. Type *20* in the **Labor %** cell.
12. Enter *<Today's Date plus 1 week>* in the **Date** cell for the second row.
13. Type *25* in the **Labor %** cell.
14. Enter *<Today's Date plus 2 weeks>* in the **Date** cell for the third row.
15. Type *30* in the **Labor %** cell.
16. Select the **Close** button.
17. Select the **Project Rollup** icon in the **Project** grid. The **Project Rollups** window opens.
18. Select the **Percent Complete History** check box.
19. Select the **Rollup** button.
20. Select the **Percent Complete History** button. The **Percent Complete History** window opens.
21. Select the **Chart** tab.
22. Select **New Building > Pre-Design > Electrical**.
23. Select the **Close** button.
24. Select the **Earned Value** button. The **Earned Value** window opens.

Web

1. Select **Project Central**. The **Projects** applet opens.
2. Select the **Million Dollar Bridge** project.
3. Select the **Planning** tab.
4. Select **Edit > Earned Value**. The **Earned value** window opens.
5. Select **Pre-Design**.

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6. Select the **X** to close the window.
7. Select **Edit > Percent complete history**. The **Edit > Percent complete history** window opens.
8. Select **Design Development**.
9. Select the **Add Row** button.
10. Enter *<A date that is 4 months after the date of the row above>* in the **Date** cell.
11. Type *90* in the **Labor %** cell.
12. Select **Construction Documents**.
13. Select the **Add Row** button.
14. Enter *<A date that is 1 month after the date of the row above>* in the **Date** cell.
15. Type *65* in the **Labor %** cell.
16. Select the **X** to close the window.
17. Select **Edit > Earned Value**. The **Earned value** window opens.
18. Select **Pre-Design**.
19. Select the **X** to close the window.

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Check Your Understanding

In what applet is a Change Order created?

a) Project Planning in the Desktop
b) Project Administration
c) Projects
d) None of the above

Why might someone choose to use multiple rates in a project plan?

a) To reflect different types of resources
b) To account for different levels of expertise
c) To adjust cost estimation to reflect different phases of the project
d) To account for different billing structures
e) All of the above

How can you easily budget for many different job titles in your project plan?

a) By using a single rate for all billing structures
b) By assigning different tasks to each billing structure
c) By using a rate schedule
d) By creating separate project plans for each billing structure
e) None of the above

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

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LESSON 4: WORKING WITH ACTIVITIES

Learning Objectives

Recall how to manage work assignments with Activities in Unanet AE's web application.

- Explain the key concepts related to Activities in Unanet AE.
- Describe how to access and navigate the Activities.
- List how to add, assign, and complete activities.
- Explain activity filtering and preferences.
- Describe how activities integrate with Project Central.

Overview

Managing work assignments efficiently can be critical to the success of any project. Unanet AE offers a suite of tools to help you plan, monitor, and control various assignments that are part of your projects or other record types. This lesson will provide a comprehensive guide on how to manage Activities using Unanet AE.

Key Concepts

- Activity Card: Represents a single task or Activity.
- Board View: A Kanban-style view for monitoring Activity statuses.
- List View: A traditional list format to view all Activities.
- WBS View: Shows where activities are assigned in the WBS structure and only available on the Activities tab in Project Central.
- Activity Preferences: Customizable settings for your Activities.
- Time Entry: Option to log time spent on an Activity.
- Archive: Older Activities can be archived to hide them from view.

Accessing Activities

Navigation Menu: Users can go through the general navigation menu by clicking on **Activities**. Here, you will be able to see all the activities that you have either been assigned to or have assigned to others. By default, you will be in the Board View, which displays Activities as cards. However, you also have the option to switch to List View if you prefer seeing activities displayed in rows.

Project Central: The second method for accessing Activities would be more typical for Project Managers and is specific to individual projects. Open a Project in Project Central and click on the **Activities** tab. This gives you a tailored view of activities directly

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associated with the project. One advantage of this approach is the support for WBS View, allowing you to see Activities grouped by Work Breakdown Structure items. Adding Activities here is efficient as the system will automatically associate them with the project's existing structure.

Board View

The Board View in Activities is designed to give you a visual overview of all your Activities, organized into various sections like **To-Do**, **In Progress**, and **Completed**. This Kanban-like interface is perfect for teams that want to easily track the flow of tasks from inception to completion.

One of the key features of Board View is the ability to move activities between sections easily via drag-and-drop functionality. This allows for a fluid, intuitive way to update an Activity's status.

List View

The List View in Activities provides a structured, tabular representation of project activities, offering a more traditional approach to project management as compared to the Board View. It's particularly useful for those who prefer a detailed, text-oriented way to manage tasks and activities.

WBS View

The WBS (Work Breakdown Structure) View in the Project Central Activities tab is a specialized view designed to offer a hierarchical representation of all the activities within a project. This view aligns closely with List View but the Activities are grouped by project WBS items. This is particularly useful for those who want to understand the structure and progression of tasks at multiple levels of a project.

Activity Preferences

The **Activity Preferences** screen in Unanet AE provides a centralized location for users to manage various settings related to their activities. You can access **Activity Preferences** via the **Options** menu.

On the **Notifications** tab you can:

- Set your preferred time zone to ensure that activity due dates and notifications align with your local time.
- Specify the schedule during which you'd like to receive notifications. For example, you might set it to only receive notifications during work hours.
- Designate the email address where all activity-related notifications will be sent.
- Customize the types of activity notifications you wish to receive. Options include:
    - Activity Assignment: Get notified when you are assigned to an activity.

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- Activity Updates: Receive alerts for any updates or changes made to an activity you're involved in.
- Upcoming Activity Due Date: Be reminded when an activity you're assigned to is nearing its due date.
- Activity Status Change: Receive notifications when the status of an activity changes, such as moving from In Progress to Completed.

On the **Connections** tab you can connect Activities to Outlook to see assigned Activities on your calendar based on Due Date.

By fine-tuning these settings in the **Activity Preferences** screen, you can make sure you're kept informed about activities in a way that suits your workflow and schedule.

Activity 4.1 – Create and Update Activities

In this activity, you will create a new Activity and update it.

Activity Steps

Part 1: Create Activity

1. Select **Activities**.
2. Verify that the **Board view** button is selected.
3. Click the **Add activity** button in the **To-do** section.
4. Type *Update Specs* in the text field, replacing the “No title entered” text.
5. Type *Test activity* in the **Details** field.
6. Select the **X** to close the Activity.

Part 2: Update Activity

1. Select the title of the **Update specs** Activity. The Activity details open.
2. Select the **plus** icon for **Assignees**.
3. Select the **Fletcher, Erwin P.** check box.
4. Select the **Apply** button.
5. Select **<date one week from today>** in the **Due Date** field.
6. Select the **Checklist** tab.
7. Select the **Add item** button.
8. Type *First Checklist Item* in the text field, replacing the “No title entered” text.
9. Select the **X** to close the Checklist item.

Bulk Activity Updates

The Activity screen supports bulk updates to records to Delete, Archive, or Move Activities between sections. This is done by selecting multiple Activities and clicking one of the bulk action buttons at the top of the screen.

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Activity 4.2 – Archive Activities

In this activity, you will learn how to bulk archive Activities.

Activity Steps

1. Select **Activities**.
2. Select the **List view** button.
3. Select the **Update Specs** check box.
4. Select the **Move to** button.
5. Select **Done**.
6. Check the check boxes beside the activities in the **Done** section. **Note: Update Specs** is still selected.
    - Research
    - Call the team
7. Click the **Archive** button.

Filtering

The Activity screen supports filtering so that you can narrow your focus to only the Activities that you're interested in viewing. You can filter by assignees, associated record types, dates, status, priority, and archival status.

Activity 4.3 – Filter Activities

In this activity, you will learn to filter Activities.

Activity Steps

Part 1: Filter the Activity window

1. Select **Activities**.
2. Verify that the **List view** button is selected.
3. Select the **filter** icon at the top right of the screen.
4. Select the **Archived Only** check box.
5. Click away from the filter menu to close the menu.

Part 2: Clear the Activity filter

1. Click on the **filter** icon at the top right of the screen.
2. Click the **Clear all** text at the top of the list.
3. Click away from the filter menu to close the menu.

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Activities in Project Central

Activities can be a very useful tool for Project Managers to communicate work assignments and for assisting assignees in entering their time accurately. Adding activities via Project Central can expedite the process of associating Activities to project work breakdown structure items.

Activity 4.4 – Associate Activities with a WBS

In this activity, you will add an activity to a project phase and assign an employee.

Activity Steps

1. Select **Project Central**.
2. Select the **Million Dollar Bridge** project.
3. Select the **Activities** tab.
4. Select the **WBS view** button.
5. Select the **Add activity** button on the **Pre-Design** row.
6. Type *Site Visit* in the text field, replacing the “No title entered” text.
7. Select the **plus** icon for **Assignees.**
8. Select **Casco, Lewis J**.
9. Select the **Apply** button. Note that the **Million Dollar Bridge (FF) / Pre-Design** is associated with the activity automatically.
10. Type *Test Activity* in the **Details** field.
11. Select the **X** to close the Activity.

Enter Time for an Activity

Once assigned to an employee, an Activity will appear in their Activities list, accessible from the navigation menu.

Activity 4.5 – Enter Time for an Activity

In this activity, you will open an assigned Activity and add time to it, then navigate to the Timesheet to view the entry there.

Activity Steps

Part 1: Enter time for an Activity

1. Select **Activities** from the navigation menu.
2. Select the **Site Visit** activity in the **To-do** section.

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3. Select the **Timesheet** tab.
4. Select the **Add row** icon.
5. Select *Engineer 1* in the **Job Title** column.
6. Type *8* into the first workday listed in the row, you may need to scroll horizontally to see the days available.
7. Select the **comment icon** below the cell.
8. Type *Testing Activities* in the comment field.
9. Select the **Save** button to save the comment.
10. Select the **Save** button to save the time entry.
11. Select the **X** to close the Activity.

Part 2: View the time entry in the Timesheet

1. Expand the **Personal** module on the navigation menu.
2. Select **Time** to open the current Timesheet.
3. Hover your cursor over the **comment icon** to see the comment you entered via the Activity

Complete an Activity

Completing an Activity can be accomplished by clicking the icon with a checkmark enclosed in a circle. This icon appears near the title of Activities in all views and on the Activity window when an Activity is open.

Activity 4.6 – Complete an Activity

In this activity, you will complete an Activity.

Activity Steps

1. Select **Activities** from the navigation menu.
2. Select the **Site Visit** activity in the **To-do** section.
3. Click the icon with a checkmark enclosed in a circle.
4. Click the **X** to close the Activity.

Note: The activities can be archived to filter them out of the list.

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Check Your Understanding

Which Activity view option is available in Project Central to expedite associating Activities to project work breakdown structure items?

a) Board view
b) List view
c) WBS view
d) My view

Which Activity view option supports drag-and-drop functionality to move Activities between sections?

a) Board view
b) List view
c) WBS view
d) My view

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

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LESSON 5: PROJECT MANAGEMENT REPORTING

Learning Objectives

Describe how to navigate the PM reporting options.

- List the available reports.
- Explain how to run the commonly used PM reports.

Overview

Project Management Reports are project-based reports. PM Reports reside in Unanet AE at **Utilities > PM Report Designer**.

Key Concepts

- Access to these reports are granted through the **Permissions** tab in the **PM Report Designer**.
- You are unable to modify the Original version of a report, however, you are able to copy a report and modify it.

Report Descriptions

- Accounting Summary - Summarized project metrics by General Ledger account.
- Accounting Transactions - Itemizes project transactions grouped by General Ledger account.
- Expense Transactions - Shows detailed non-labor expense transactions.
- Labor Transactions - Shows detailed timesheet transactions.
- Market Analysis - Summarized project metrics by market sector. When sorted by market sectors, this report will apply the market sector factor as established in the project setup to all metrics.
- Project Backlog - This project calculates backlog (contract, less billed, less WIP). Used only when using revenue recognition to create General Ledger entries for WIP per project. For all other cases, use Custom Report Contract Backlog.
- Project Budget Analysis (Bill Amount) - Compares Project Budget Amounts to Project Actuals at the billable rate (effort).
- Project Budget Analysis (Cost Amount) - Compares Project Budget Amounts to Project Actuals at the cost rate. For labor transactions, cost is either pay rate, or job cost rate depending on the configuration in Global Settings.
- Project Cost Detail (Single Period) - Cost transactions for a single period of time.
- Project Cost Detail (Two Periods) - Cost transactions for two periods of time.

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- Project History - Five-section report that includes labor transactions for two periods of time, an ODC section for two periods of time, consultant transactions for two periods of time, budget amounts, and billing amounts (current and inception to date). Cost transactions are at pay rate.
- Project History (Job Cost) - Same as Project History except cost transactions are shown at the job cost rate.
- Project Invoices - Invoices broken down by metric type.
- Project Plan - Budgetary information summarized at the allocation level (Job Title for Labor; Expense Code for Non-Labor) derived from Project Planning.
- Project Profit - Summarized project metrics show project profitability. WIP on this report is calculated using general ledger entries against a WIP account.
- Project Profit (Non G/L) - Summarized project metrics show project profitability. WIP on this report is calculated using transactions with a billing status of R or H.
- Resource Schedule - This report shows scheduled work for a period of time. Its intent is to show upcoming work.
- Schedule Analysis (Bill Rate) - This report compared scheduled Work-to-Date versus Payroll Labor Cost-to-Date. Non-labor items use cost amount.
- Schedule Analysis (Job Cost Rate) - This report compares scheduled Work-to-Date versus Job Cost Labor-to-Date.
- Schedule Analysis (Pay Rate) - This report compared scheduled Work-to-Date versus Job Cost Labor-to-Date. Non-labor items use marked up amount.
- Unbilled Charges - Project cost transactions with a billing status of R or H summarized at the payee level (employee/vendor).
- Unbilled Charges (Detail) - Project cost transactions with a billing status of R or H summarized to the transaction date level.

Field Definitions

Most reports will display the same fields in the **Print Criteria** window. Key fields to be aware of are listed here.

Filters Tab

Date Ranges

- **As Of –** Report will pull data based on a specific date.

Depending on the report, you may see a **Date Range** option instead of an **As Of** field.

Project Dates

Filter projects by the project start or end date. This doesn't affect the data but pertains to when the project starts and ends.

Project Status

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Filters for Project Status allow you to choose between active and/or inactive projects.

Charge Types, Sectors, and Report Types
Select the appropriate check boxes in each section to filter the data. Sector Filters allow selection based on market sectors, but requires project setup considerations for market sector and associated percentage assignments. These filters are set up in Project applet under the Project Management module.

Sort & Group By

- **1st and 2nd -** These options facilitate organization based on client code or other criteria.

Print Expanded
Select the check box to run the report with the data fully expanded.

View Data
If you need more options to view the raw data, select the **View Data** button. This displays a data grid that you can export to different formats like Excel or PDF for further analysis.

Print
The **Print** button runs the report.

Multi-Currency Tab
The **Multi-Currency** tab is exclusive to clients using multiple currencies.

Settings Tab
The **Settings** tab filters the data itself.

Includes
Select the check boxes to include or exclude data based on the available criteria. Selecting Grand Total creates a Grand Total row at the report's bottom that displays the sum of all amounts in each column. Rollup Nodes and Work Breakdown Structure options influence the depth of information displayed in the report.

Date Range Evaluation Methods

- **Labor and Non-Labor** – Select Transaction Date or G/L Period End Date. Most clients use Transaction Date. For labor transactions, select Transaction Date for Timesheet date, and G/L Period End Date for the Labor Distribution General Journal entry’s G/L period.

Organizational Units

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Select **No Org**, **Org Path**, or **Org Code/Level** to further filter the data. Org Path and Org/Code Level allow you to set additional criteria. **Note:** If you are not using Org Path, ensure that any prior selections have been cleared from the form.

Team Leaders Tab

Team Leaders, Project Filters, and Client Filters further refine results based on project leaders, specific projects, or clients. Filters can be combined. **Note:** If you are not using these filters, ensure any prior selections have been cleared from the form.

UDF's Tab

UDF's are customized User Defined Fields. If you have set up UDFs, you can use them to filter the data.

Project Profit report

A project profit report is a financial document that provides an overview of the financial performance and profitability of a specific project. It is a crucial tool for project managers, stakeholders, and executives to assess the economic viability and success of a project. The report typically includes information on various financial aspects of the project, allowing for a comprehensive analysis of its financial health.

Here are key components and reasons why a project profit report is useful:

- **Revenue and Income:** The report outlines the total revenue generated by the project. This includes income from sales, services, or any other sources related to the project.

- **Costs and Expenses:** It details all costs associated with the project, including direct costs (materials, labor, etc.) and indirect costs (overheads, administrative expenses, etc.). By comparing revenue to expenses, stakeholders can determine the project's profitability.

- **Profit and Loss Statement:** This section summarizes the financial performance by calculating the profit or loss incurred during the project. It helps identify whether the project is meeting its financial goals.

- **Return on Investment (ROI):** ROI is a critical metric that measures the profitability of an investment relative to its cost. A project profit report typically includes ROI calculations, helping stakeholders assess the efficiency of their investment.

- **Decision Making:** Project profit reports provide valuable insights for decision-making. They help stakeholders understand the financial implications of

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continuing, modifying, or terminating a project. This information is vital for strategic planning and resource allocation.

- **Performance Measurement:** The report serves as a benchmark for evaluating the success of the project against predefined financial goals and objectives. It enables stakeholders to assess whether the project is meeting expectations.

- **Investor and Stakeholder Communication:** For external parties such as investors, lenders, or other stakeholders, a project profit report communicates the financial health of the project, instilling confidence and transparency.

In summary, a project profit report is a comprehensive financial tool that offers insights into the economic performance of a project. It aids in decision-making, helps evaluate the project's success, and provides crucial information for future planning and resource allocation.

Note: The system administrator must grant report permissions to users for the report to display in the menu for selection. This is done under **Utilities > PM Report Designer**.

Activity 5.1 – Run the Project Profit (Non-G/L) Report

In this activity, you will run and review the Project Profit report.

Activity Steps

1. Navigate to **Project Management > Reports > PM Reports**. The **Reports** applet opens.
2. Select **Project Profit (Non-G/L)** in the **Reports** field.
3. Select the **Run** button. The **Print Criteria** window opens.
4. Enter **<today's date>** in the second **As Of** field.
5. Verify that the **Active** check box is selected in the **Project Status** section.
6. Verify that the **Billable** check box is selected in the **Charge Types** section.
7. Verify that the **Print Expanded** check box.
8. Select **Project Manager** in the **1st** field in the **Start and Group By** section.
9. Select the **Settings** tab.
10. Clear the following check boxes:
    - Unsubmitted Time
    - Unapproved Time
    - Roll Up nodes
11. Verify that the following check boxes are selected:
    - Grand Total
    - Work Break Down Structure

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12. Verify that the **Transaction Date** radio button in the **Date Range Evaluation Methods Labor** section is selected.
13. Verify that the **Transaction Date** radio button in the **Date Range Evaluation Methods Non-Labor** section is selected.
14. Select the **Print** button. The report displays. The data is sorted by Project Manager.
15. Select the **Run** button.
16. Select the **View Data** button. The **Grid View** window opens.

Schedule Analysis report

A schedule analysis report is a document that assesses the progress, efficiency, and effectiveness of a project schedule. It provides a detailed examination of the project timeline, comparing planned schedules with actual progress. The primary goal of a schedule analysis report is to evaluate whether a project is on track, identify potential issues or delays, and recommend corrective actions. Here are some key aspects and reasons why a schedule analysis report is important:

- **Schedule Performance:** The report compares the planned schedule (as outlined in the project plan or schedule baseline) with the actual progress made during the project. This helps in assessing whether tasks are being completed on time, if there are any delays, and if the project is adhering to its timeline.

- **Resource Utilization:** The report may assess how well resources (human, financial, and material) are being utilized in line with the project schedule. This helps in identifying any resource constraints or bottlenecks that may be affecting the project's progress.

- **Variances and Deviations:** Schedule analysis reports highlight any variances or deviations from the planned schedule. This includes both positive variances (tasks completed ahead of schedule) and negative variances (tasks delayed). Understanding these variances is essential for taking corrective actions and maintaining control over the project.

- **Forecasting and Predictions:** Based on the analysis, the report often includes forecasts and predictions regarding the future schedule performance. This is useful for anticipating potential issues and making adjustments to mitigate risks before they impact the project timeline.

- **Communication and Reporting:** The report serves as a communication tool for project stakeholders, including team members, project managers, and executives. It provides a clear and concise overview of the project's schedule status, fostering transparency and accountability.

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- **Risk Identification:** By analyzing the schedule, the report helps identify potential risks and challenges that may affect the project timeline. This allows for proactive risk management and the implementation of strategies to address or mitigate these risks.

- **Decision-Making:** Project managers and stakeholders can make informed decisions based on the insights gained from the schedule analysis report. This includes adjusting resource allocation, revising project timelines, or implementing changes to the project plan.

- **Continuous Improvement:** The analysis of project schedules provides valuable lessons for future projects. Identifying what worked well and what caused delays helps in refining project management processes and improving future planning.

In summary, a schedule analysis report is crucial for monitoring and managing the progress of a project. It provides a detailed assessment of schedule performance, helps identify potential issues, supports decision-making, and contributes to the overall success of the project.

Activity 5.2 – Run the Schedule Analysis Report

In this activity, you will run and review the Schedule Analysis report.

Activity Steps

1. Navigate to **Project Management > Reports > PM Reports**. The **Reports** applet opens.
2. Select **Schedule Analysis (Bill Rate)** in the **Reports** field.
3. Select the **Run** button. The **Print Criteria** window opens.
4. Enter **<today's date>** in the second **As Of** field.
5. Verify that the **Active** check box is selected in the **Project Status** section.
6. Verify that the **Billable** check box is selected in the **Charge Types** section.
7. Select the **Print Expanded** check box.
8. Select the **Settings** tab.
9. Verify that the following check boxes are selected:
    - Unsubmitted Time
    - Unapproved Time
    - Grand Total
    - Roll Up nodes
    - Work Break Down Structure

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10. Verify that the **Transaction Date** radio button in the **Date Range Evaluation Methods Labor** section is selected.
11. Verify that the **Transaction Date** radio button in the **Date Range Evaluation Methods Non-Labor** section is selected.
12. Select the **Print** button. The report displays. Projects are displayed one per page.
13. Expand **Schedule Analysis (Bill Rate)** in the menu on the left side of the report.
14. Select the **<fifth project>** listed. The project page displays.

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Check Your Understanding

Which report itemizes project transactions grouped by General Ledger account?

a) Accounting Summary
b) Accounting Transactions
c) Expense Transactions

Which report contains summarized project metrics to show project profitability?

a) Project Profit (Non G/L)
b) Project Plan
c) Expense Transactions

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

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LESSON 6: PROJECT MANAGEMENT DASHBOARDS

Learning Objectives

Review Project Management Dashboards.

- Describe the purpose of Dashboards.
- List Dashboards useful for Project Managers.

Overview

The starting place in Unanet AE is your Dashboard- it is the first thing you see when logging in and can serve as a launch pad for business analytics and streamlining your work in Unanet AE. Dashboards in Unanet AE are sourced from one of two types: Classic and Analytic.

Classic Dashboards
Classic Dashboards allow you to augment Unanet AE and streamline common activities. For instance, receive an alert when a project goes over budget or when Receivables go past due. Alternatively, many reports in Unanet AE can be run, directly from Classic Dashboards and Gridgets, allow you to display- even update- data through a dynamic grid.

Analytic Dashboards
Analytic Dashboards use rich data visualizations allowing you to perform business analysis and gain powerful insights into your data. For instance, view Utilization across departments with running trend lines. Use Charts, Grids, Maps, etc. to dynamically filter and interact with your data - all in real-time.

Analytic dashboards are highly valuable tools for project managers as they provide a centralized platform for monitoring, analyzing, and visualizing key project data. Here are several ways in which analytic dashboards are useful for project managers:

- **Real-time Monitoring:** Analytic dashboards provide real-time updates on project progress, allowing project managers to stay informed about the latest developments. This helps in identifying and addressing issues promptly.

- **Data Visualization:** Dashboards use charts, graphs, and other visual elements to represent complex project data in a clear and understandable way. This

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visualization makes it easier for project managers to interpret trends, patterns, and outliers.

- **Performance Measurement:** Project managers can use analytic dashboards to track key performance indicators (KPIs) and evaluate the overall performance of the project. This enables them to assess whether the project is meeting its objectives and milestones.

- **Resource Allocation:** Analytic dashboards provide insights into resource utilization, helping project managers allocate resources effectively. This includes monitoring team workloads, identifying bottlenecks, and ensuring that resources are allocated where they are needed most.

- **Risk Management:** Dashboards can highlight potential risks and issues, allowing project managers to proactively address them before they escalate. This helps in mitigating risks and ensuring that the project stays on track.

- **Communication and Collaboration:** Analytic dashboards facilitate communication and collaboration among team members by providing a shared platform for accessing and discussing project data. This can improve transparency and alignment within the project team.

- **Decision-Making:** By having access to real-time and relevant data, project managers can make informed decisions. Analytic dashboards provide a comprehensive view of the project, aiding in strategic decision-making to keep the project aligned with organizational goals.

- **Client and Stakeholder Reporting:** Dashboards can be customized to present information in a format that is easily understandable for clients and stakeholders. This enhances communication and keeps external parties informed about project progress.

- **Forecasting and Planning:** Project managers can use historical data and trends displayed on the dashboards to make more accurate forecasts and better plan for future phases of the project. This helps in setting realistic expectations and timelines.

- **Continuous Improvement:** Analytic dashboards enable project managers to analyze project performance over time, identify areas for improvement, and implement changes to enhance overall efficiency and effectiveness.

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In summary, analytic dashboards empower project managers by providing them with real-time insights, facilitating data-driven decision-making, and promoting effective communication and collaboration within the project team and with stakeholders.

Useful Dashboards for Project Management

My Projects - Project Managers (PM)

The Project Manager dashboard contains basic summary project information. It is focused on unbilled and backlog. It returns all active projects for which the currently logged-in employee is listed as responsible.

Filters

Items are filterable by:

- **Project Type:** Billable, Indirect, Opportunity, etc.
- **Project location (US State)**
- **Contract Type**

Each filter area has an option to expand to the full window size for easier viewing.

Dashboard Parameters

- **Current_Period_Code:** The GL that is used to determine which GL period amounts are included in the **Current** columns
- **Labor_Only:** Determines if the amounts should include all types or just labor.

My Projects – Principal in Charge (PIC)

The My Projects - Principal In Charge dashboard contains basic summary project information. It is focused on backlog and project cost multipliers. It returns all active projects for which the currently logged-in employee is listed as responsible.

Filters

Items are filterable by:

- **Principal In Charge**
- **Project Manager**
- **Project Type:** Billable, Indirect, Opportunity, etc.
- **Report Type**
- **Project location (US State)**
- **Contract Type**

Each filter area has an option to expand to the full window size for easier viewing.

Dashboard Parameters

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- **Current_Period_Code:** The GL that is used to determine which GL period amounts are included in the **Current** columns
- **Labor_Only:** Determines if the amounts should include all types or just labor

Opportunity Forecast

The Opportunity Forecast Analytic dashboard displays Opportunity pipeline information across stages, with Expected Revenue weighted by Win Probability for any Opportunity with an Expected Close date.

Filters

Items are filterable by:

- **Stages**
- **Owners**
- **Stage Size**

Each filter area has an option to expand to the full window size for easier viewing.

Activity 6.1 – Review My Projects – PM View Dashboard

In this activity, you will review the My Projects – PM View Dashboard.

Activity Steps

1. Navigate to **Dashboards > Analytics**. The **Dashboard - Analytics** dashboard displays.
2. Select the **left-side expander arrow** to display the list of Dashboards.
3. Select **My Projects – PM View**.
4. Select the **Parameters** button. The **Dashboard Parameters** window opens.
5. Select **<Current Period>** in the **Value** field for **Current_Period_Code**.
6. Select the **Submit** button.
7. Select **Maine** in the US Map in the **PTD Profit** section. The project list filters to show only projects in Maine.
8. Select the **Filter** icon with the red x in the **PTD Profit** section to clear the state filter.
9. Select the **20140002 Pine Bluff Marina Inspection** project. The various sections of the dashboard update for the specific project.
10. Select the **Filter** icon with the red x in the **Project Summary** section to clear the project filter.
11. Select the **Export To** button for the Dashboard.
12. Select **Print Preview**.

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Check Your Understanding

Which Dashboard allows you to filter by stages, stage owner, and stage size?

a) Project Manager
b) Principal in Charge
c) Opportunity Forecast

Which Dashboard allows you to filter by report type?

a) Project Manager
b) Principal in Charge
c) Opportunity Forecast

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

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APPENDIX A: Check Your Understanding Answer Key

Lesson 1: Project Planning

At what project level must allocations be assigned?

a) Lowest project level
b) Highest project level
c) Any project level

Which of the following statements are true? Select all that apply.

a) Project Templates are reusable project structures that can be applied to a project record.
b) WBS Templates can include project structure as well as other dimensions of project configuration such as budgets, contracts, members, billing settings, etc.
c) WBS Templates are reusable project structures that can be applied to a project record.
d) Project Templates can include project structure as well as other dimensions of project configuration such as budgets, contracts, members, billing settings, etc.

The purpose of a resource group is to quickly add multiple resources to a plan.

a) True
b) False

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Lesson 2: Overseeing Plans and Schedules

The Project Figures report returns "As of the Moment" project metrics for a given project to all its WBS levels.

c) True
d) False

Which predecessor/successor relationship is described in this statement: Task B can't finish until Task A is done. They don't have to end at the same time. Task B can end any time after Task A ends.

e) FS (Finish-to-Start)
f) SS (Start-to-Start)
g) FF (Finish-to-Finish)
h) SF (Start-to-Finish)

When using the Desktop Resource Scheduler, which tab contains a “heat map” to warn of overscheduling?

e) Project
f) Employee
g) Schedule
h) Filters

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Lesson 3: Project Monitoring

In what applet is a Change Order created?

e) Project Planning in the Desktop
f) Project Administration
g) Projects
h) None of the above

Why might someone choose to use multiple rates in a project plan?

f) To reflect different types of resources
g) To account for different levels of expertise
h) To adjust cost estimation to reflect different phases of the project
i) To account for different billing structures
j) All of the above

How can you easily budget for many different job titles in your project plan?

f) By using a single rate for all billing structures
g) By assigning different tasks to each billing structure
h) By using a rate schedule
i) By creating separate project plans for each billing structure
j) None of the above

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Lesson 4: Working with Activities

Which Activity view option is available in Project Central to expedite associating Activities to project work breakdown structure items?

a) Board view
b) List view
c) WBS view
d) My view

Which Activity view option supports drag-and-drop functionality to move Activities between sections?

a) Board view
b) List view
c) WBS view
d) My view

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Lesson 5: Project Management Reporting

Which report itemizes project transactions grouped by General Ledger account?

d) Accounting Summary
e) Accounting Transactions
f) Expense Transactions

Which report contains summarized project metrics to show project profitability?

d) Project Profit (Non G/L)
e) Project Plan
f) Expense Transactions

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Lesson 6: Project Management Dashboards

Which Dashboard allows you to filter by stages, stage owner, and stage size?

d) Project Manager
e) Principal in Charge
f) Opportunity Forecast

Which Dashboard allows you to filter by report type?

d) Project Manager
e) Principal in Charge
f) Opportunity Forecast

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