



# **UNANET GOVCON: MANAGING PROJECT EXECUTION AND CONTROL**

## **PARTICIPANT GUIDE**

Last Revised April 2024

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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 activities while attending the course. Additionally, participants should record notes and actions for reference when working within their own Unanet system.

### Symbols Used In This Guide:

<b>Activity</b>  A hands-on practical exercise that will be completed by participants	<b>Demonstration</b>  An instructor-guided detailed review of features or processes	<b>Important Note</b>  A callout of critical information related to a topic	<b>Question</b>  Assesses participants' understanding of a topic	<b>Tour</b>  A high-level review of system features or functionality by the instructor
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### Unanet University Contact Information

Send questions to [VirtualUU@unanet.com](mailto:VirtualUU@unanet.com) for information about courses, course schedule, enrollments, and certifications. This mailbox is monitored daily.

### Unanet Certification Program and Badges

For more information on the Unanet Certification Program, [click here](#).

# COURSE INTRODUCTION

In this course, you will review the recommended configurations for projects based on their billing types, the factors included in project revenue and probability calculations, and how Estimated Time to Completion (ETC) can be used to assess project health. Additionally, you will practice approving labor and expense charges to projects and use Unanet reports to generate reports to compare plans to actuals. Finally, you will determine which corrective action to take to maintain control of your projects, as well as create plan sets to manage various planning scenarios.

**Recommended roles:** Administrator, Project Manager, Project Lead, Project Viewer, Manager, Resource Planner, Resource Assigner

## Learning Objectives

In this course, **Unanet GovCon: Managing Project Execution and Control** participants will:

- Review Unanet's recommended configuration for each billing type at the Project and Task levels
- Approve time and expense submissions and calculate Estimated Time to Completion (ETC) values for a Project or Task
- Utilize Unanet reports to assess and manage project performance
- Identify the appropriate response to project metrics report output

## Student Training Site

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

## Roles & Access

Unanet is a role-based system which provides security and access based on the roles assigned to the user by the System Administrator. It is helpful to be familiar with Unanet's roles and the access that comes with each unique role. Users may find the need to be assigned a combination of roles in order to perform various job functions.

During this course, students will be instructed to log-in to Unanet utilizing specific user personas which contain the appropriate roles in order to access and complete the required activities.

**Please note: the password is case sensitive, but the username is not.**

Company Title	Unanet Role	Name	Unanet Username	Password
Director of Finance	<b>Administrator</b> – Performs all functions; can access all reports and data	Fran Schaeffer	fschaeffer	welcome
Contracts Administrator	<p><b>Billing Manager</b> – Manages posting options, posting, invoice creation, and revenue recognition; can view AR Aging</p> <p><b>Bill Budget Manager</b> – Can edit <i>Project/Task Bill Budgeted, ETC,</i> and <i>Est. Total</i> amounts</p> <p><b>Contract Manager</b> – Can view, edit, and delete Contracts</p> <p><b>Cost Budget Manager</b> – Can edit <i>Project/Task Hours, Cost and Burdened Cost Budgeted, ETC,</i> and <i>Est. Total</i> amounts</p> <p><b>Project Manager</b> – Manages <i>Project</i> settings; can access <i>Project</i> reports</p>	Paloma Mangus	pmangus	welcome

	<b>Project Viewer</b> – Read only access to <i>Project</i> reports			
<b>Project Manager</b>	<p><b>Bill Rate Manager</b> – Grants additional permission to view bill rates and amounts</p> <p><b>Billing Manager</b>– Manages posting options, posting, invoice creation, and revenue recognition; can view AR Aging</p> <p><b>Manager</b> – Can perform time and expense approvals for users in their approval group</p> <p><b>Project Lead</b> – Manages limited Project settings; can access <i>Project</i> reports</p> <p><b>Resource Assigner</b> – Manages Project Assignments; can access <i>Resource</i> reports</p> <p><b>Resource Planner</b> – Manages Project Plans; can access <i>Resource</i> reports</p>	<b>Gus Lead</b>	<b>glead</b>	<b>welcome</b>

# LESSON 1: PROJECT SETTINGS BY BILLING TYPE

## Learning Objectives

- Describe the recommended project settings for each billing type
- Confirm that established system settings will appropriately support a selected Project or Task billing type

## Introduction

Once an Administrator has configured the *Setup* and *Properties* screens to support project management in their Unanet instance, it is up to Project Managers to create and modify Projects based on contractual obligations. In Unanet, revenue is calculated according to projects' billing type, while profit is calculated by dividing the total revenue minus burdened costs by the revenue.

## Calculating Revenue by Billing Types

Revenue on a project is calculated by the billing type of the project/task. For incrementally funded efforts, there is a setting on the project/task that can limit the calculated revenue by the *Funded Value* field on the project/task.

**Time & Material (TM)** revenue for labor is calculated by the bill rate multiplied by the hours. TM revenue for expenses is calculated by the direct cost of the expense multiplied by any associated markup percentage. **Cost Plus (CP)** revenue is a calculation of the direct costs, indirect costs, and any associated fees for both labor and expenses. **Fixed Price (FP)** revenue is calculated strictly by the configuration of the billing schedule on the project.

<b>Cost Plus</b>	• Direct Costs * Indirect Costs + Fee(s)
<b>Fixed Price</b>	• Billing Schedule configuration
<b>Time &amp; Materials</b>	• Labor: Bill Rate * Hours • Expense: Direct Cost * Markup %

## Calculating Profitability by Billing Types

In general terms, profit on a project is calculated by dividing the revenue minus burdened costs by the total revenue.

$$\text{Profit} = \frac{\text{Revenue} - \text{Burdened Costs}}{\text{Revenue}}$$



All costs are collected through various transactions created in the system. Depending on the criteria selected in a report that displays profit, costs may be found in one of a few system areas:

	Plans	Assignments	Budgets	Actuals
Labor Cost Source	People Plan hours	People Assignment hours		Timesheet hours
Expense Cost Source	Expense Plan direct cost entries		Expense Budget direct cost entries	Expense Report entries Vendor Invoice entries GL Journal entries

When reporting on **Plans**, the cost source for labor is the hour in the People plans and direct cost entries in the Expense plans. When reporting on **People Assignments** or **Expense Budgets**, the cost source for labor is the hours in the People Assignments and direct cost entries in the Expense Budgets. When reporting on **Actuals**, labor costs are derived from hours recorded in timesheets and non-labor costs are created through expense report entries, vendor invoice entries, and journal entries.

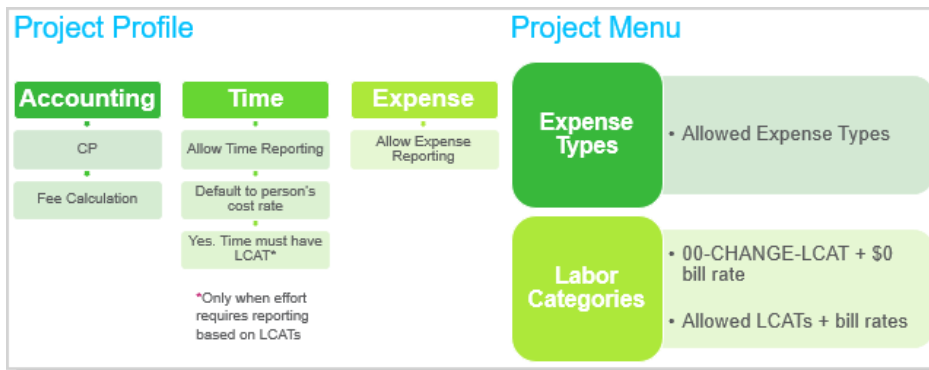
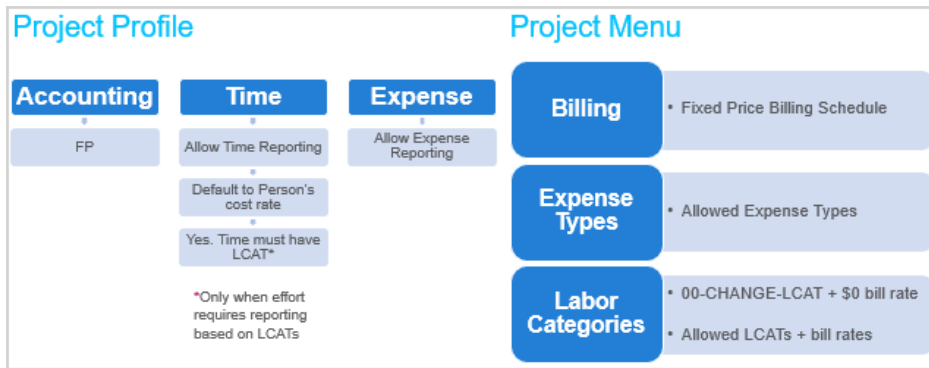
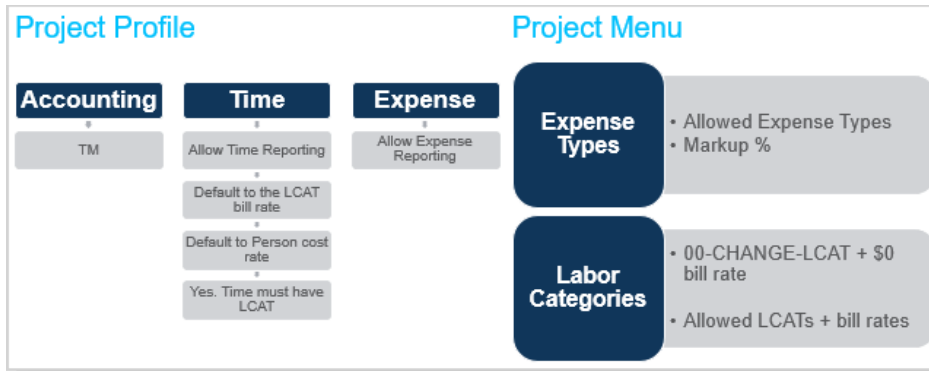


## Tour 1.1 – Review Project and Task Settings by Billing Type

*Examine Unanet’s recommended configurations for managing revenue and profitability by billing type at the Project and Task levels. Log in as the Project Manager, Paloma Mangus ([pmangus/welcome](#)) to view the relevant Project screens to understand how revenue is calculated by billing type.*

### Tour Highlights

- Part 1: Time and Materials (TM)
- Part 2: Cost Plus (CP)
- Part 3: Fixed Price (FP)



## Check Your Understanding



Which billing type has its billing and revenue determined by the settings in the project *Billing* section?

- a) CP
- b) FP
- c) TM



Under which circumstances would Labor Categories be configured on a Fixed Price project?

- a) Labor Categories should be configured on all new projects
- b) The client wants their reports based on Labor Categories
- c) The project requires Labor Categories for Time reporting



Which billing type can include a percentage markup on expenses?

- a) CP
- b) FP
- c) TM



Refer to APPENDIX A for answers to the *Check Your Understanding* questions

# LESSON 2: PROJECT APPROVALS

## Learning Objectives

- Approve time and expense charges to projects
- Review Estimated Time to Completion (ETC) functionality
- Generate Unanet reports to assess ETC values

## Introduction

In many cases it will be required or preferable to approve time and expenses at the Project level. In Unanet, this requires assigning a Project Approver, who can approve time and/or expenses. The Project Approver role can only be assigned via the *Administrators* section of the project submenu; once this role has been assigned to a user, it will appear as checked on the Roles tab of their Person Profile.

Once a project has been configured to require approvals, the designated Project Approver will see an approval queue on their Home dashboard when entries have been submitted for approval. Project Approvers may approve documents at the project level before Managers via a setting in the *Administrators* section.

The *Budget* tab of the Project Profile includes ETC fields for Hours, Labor, and Expense budgets where the Project Manager or Project Lead may enter estimated values to calculate the progress or status of a project. In the corner of the *Budget* tab, there is a link to the ETC Wizard, which is also available when editing Tasks. The wizard will create a summary of the actuals that have been submitted for the project in comparison with the budgets and ETC values entered by the project administrators.

## Project Approvals

Any project in Unanet can be configured to require project-level approvals for financial documents charged against that project. This can be set in the *Administrators* section of the Project submenu by selecting the “Approvers” option. Any user with access to the project is eligible to be assigned as a Project Approver, and the role will appear as selected but read-only on the Person Profile. Project approvals can occur in parallel, in which Manager and Project Approver users can complete approvals, or a priority order can be established to have Project Approvers approve before Managers. During the configuration of approvals, the Project Manager or Administrator can specify which types of documents a particular approver has the authority to approve.

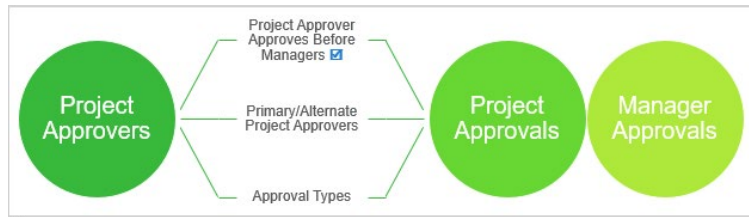


### Tour 2.1 – The Project Approval Process

Log in as Gus Lead (*glead/welcome*), who has been assigned as Project Approver on a project, to review the project settings for managing approvals and the approval process.

## Tour Highlights

- Review the assignment of Project Approvers and their alternates
- Discuss the setting which ensures Project Approvers will approve submissions before Managers
- Explore the project approval process



## Activity 2.2 – Complete Project Approvals

Log in as Gus Lead ([glead/welcome](#)) to identify and process timesheets and expense reports awaiting approval.

### Activity Steps

#### Part 1: Approve Project Time Charges

1. On the *Home Dashboard*, scroll down to the *Approvals* section.
2. Under *Project Approvals*, select “Primary Approvals”.
3. In the *Time* section, select the **magnifying glass icon** in the first row.
4. Review the timesheet entries and approval history, then press the **Approve/Next button**.
5. Repeat steps 3-4 to approve the remaining timesheets in the queue.

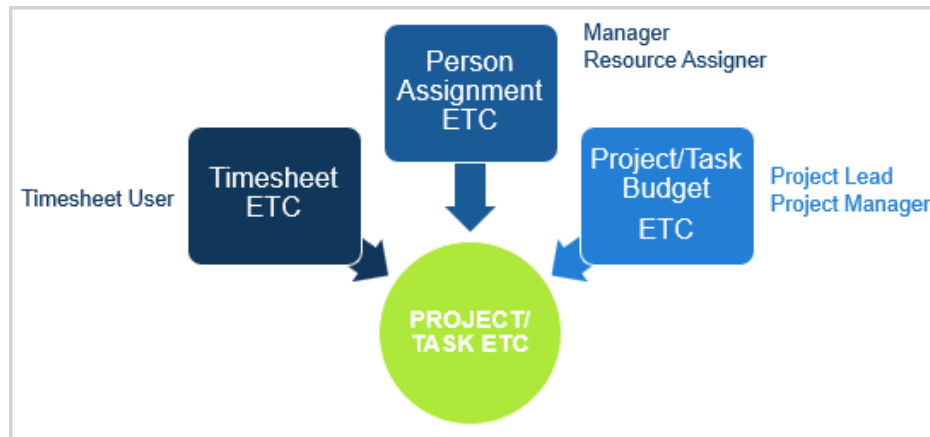
#### Part 2: Approve Project Expense Charges

1. In the *Expense Report* section, select the **magnifying glass icon** in the first row.
2. Review the reported expenses, attached receipts, and approval history, then press the **Approve/Next button**.
3. Repeat the above step to approve the remaining expense reports in the queue.

## Estimates To Completion (ETC)

In Unanet, timesheet users can enter their best guess on how many hours it will take for them to complete a project or task; the sum of these values from multiple users represents the total Estimate To Completion (ETC) for that project/task. Additionally, Managers who have the Resource Assigner role can update ETC for users via their Project Assignments, while a Project Lead or Project Manager can update ETC values directly on a project or task.

Project Approvers can also review ETC values via the *Project Schedule Details* report when ETC values have been entered on users' timesheets. This information is valuable in helping to determine whether resource assignments need to be adjusted for future periods in the project.



## Tour 2.3 – Review and Report on ETC

Log in as Gus Lead (*glead/welcome*) to review the ETC values entered by timesheet users.

### Tour Highlights

- Identify the Project and Task ETC fields and the Project ETC Wizard
- Generate the *Project Schedule Details* report to view users' ETC entries on timesheets
- View the ETC feature in the Time menu

## Check Your Understanding



Which of the following Project Administrator roles can use the ETC wizard to summarize ETC for a Project or Task?

- a) Project Approver
- b) Project Manager
- c) Resource Assigner



How is the Project Approver role assigned?

- a) In the Person Profile on the Roles tab
- b) In the Project Administrators submenu
- c) In the Project Profile on the Access tab



Refer to APPENDIX A for answers to the *Check Your Understanding* questions

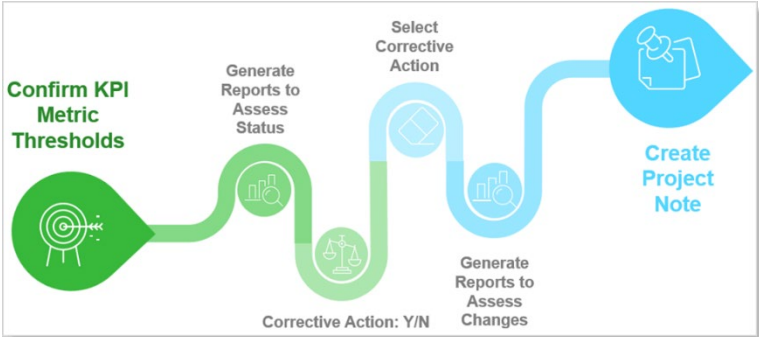
# LESSON 3: MONITORING AND CONTROLLING PROJECT PERFORMANCE

## Learning Objectives

- Utilize Unanet reports to assess and manage project performance
- Identify the appropriate response to project metrics report output

## Introduction

Unanet recommends using periodic reviews to monitor and control your projects. Project teams can use standard Project and Project Accounting reports that include plans, assignments, budgets, and actuals. These reports can be used to determine whether an effort is within the established boundaries of time, cost, and scope while returning the anticipated amounts of revenue and profit. This report data and the resulting decisions can be included in the periodic review documentation as a Project Note, creating an audit trail that can be reviewed by designated members of the project team.



## The Periodic Review

During a periodic review, the project team will first assess the current status of a project against the triple constraints of time, cost, and scope as established in the contract. Users with the Project Manager or Project Lead role can access the *Budget* tab of the Project Profile to view the Hour, Labor, and Expense budgets for their projects, then compare those values to actuals as a reference when reviewing reports. The following table displays the metrics thresholds for Gus Lead’s projects for Two Five Three Consulting:

CORPORATE THRESHOLDS		
PROJECT CODE	REVENUE	PROFIT
253CONSULT PM3-FORECAST-TM	± \$300.00	25% ± 2%
253CONSULT PM3-FORECAST-CP	\$0	N/A
253CONSULT PM3-FORECAST-FP	Billing Schedule	25% ± 5%



Navigate to the **Budget** tab of the *Project Profile* for each project below and enter the current value of each field:

PROJECT CODE	HOURLY BUDGET	LABOR BUDGET	EXPENSE BUDGET
PM3-FORECAST-CP			
PM3-FORECAST-FP			
PM3-FORECAST-TM			

The project team can begin the review with a high-level understanding of the status of ongoing efforts using the *Project Periodic Actuals* report, which can display cost or revenue actuals in a variety of time period layouts from daily to yearly. The report output can be displayed in hours, Full Time Equivalents (FTEs), labor and expense values as summed totals, or with hours, labor, and expense values shown separately. Project Administrators will need to have the Bill Rate Manager and/or Cost Rate Manager roles to view cost data or enable the Property setting “Allow Project Margin Reporting for Non-Cost Rate Managers”. This report briefly answers the question of where each project stands with regards to time, scope, and cost.



### Activity 3.1 –The Periodic Review

*Gus Lead, the Project Lead, also has the Manager and Resource Assigner roles. MyCo’s Properties are set to allow non-Cost Rate Managers to view cost data on Project Accounting reports. Log in as Gus (glead/welcome) to generate the reports necessary to conduct a periodic review of projects under his management and assess the findings.*

#### Activity Steps

##### Part 1: Review Project Actuals

1. Navigate to **Reports > Dashboard > Project Reports**.
2. Under *Periodic Reports*, select “Actuals”.
3. Modify the report criteria as indicated below:

REPORT ON:	All Projects I can see
PROJECT:	CS-GOV-CON – 253CONSULT PM3-FORECAST-CP CS-GOV-CON – 253CONSULT PM3-FORECAST-FP CS-GOV-CON – 253CONSULT PM3-FORECAST-TM
REPORTING PERIOD:	CALENDAR: <input checked="" type="radio"/> Semi-Month 1/1/2024 Start Date Calendar – Current Year

NUMBER OF PERIODS: 24

COLUMN OPTIONS:  Show Projects  Show People

CELL OPTIONS:  Hours & Charge Details

ADJUSTMENTS:  Adjustments using Worked Date within range  
 Include Pending Adjustments

INCLUDE EXPENSE REPORTS:  Using Line Item Date within range  
 Include non-completed Expense Reports

**4. Press Run Report.**

For each project, note whether the displayed actuals fall within the budget:

PROJECT	Hr	L\$	E\$
253CONSULT PM3-FORECAST-CP			
253CONSULT PM3-FORECAST-FP			
253CONSULT PM3-FORECAST-TM			

Rather than generating multiple reports for the same project(s), Unanet offers the *Project Control Panel* report, which provides a consolidated high-level view of project data with options to drill down into selected reports and screens to view supporting details. Opening the *Project Reports* menu of a record on this report displays the following options, depending on the user's roles and whether related Properties settings have been enabled:

Report Name	Description	Required Role(s)
<b>Billing &amp; Revenue Summary</b>	Summarizes all billing and revenue transactions posted to the general ledger for a selected project through a given date	Administrator P&R Administrator Billing Manager Billing Viewer
<b>Cost Summary &amp; Status</b>	Provides a weekly, monthly, or quarterly view of project actuals sorted by Cost Element	Administrator P&R Administrator
<b>Invoice Status</b>	Displays invoice status including invoice date, invoice number, and other summary information for draft, completed, and extracted invoices	Administrator P&R Administrator Billing Manager Billing Viewer
<b>Organization Activity</b>	Collects all projects, user-defined field values, and timesheet comments for a selected Project Org or Owning Org through a given date range	Administrator P&R Administrator Project Manager Project Lead

		Project Viewer Project Approver Resource Requestor
<b>Project Transactions</b>	Compares plans, assignments, and actuals for selected projects in a daily, weekly, monthly, or quarterly bar graph with an option to include a cumulative line	Administrator P&R Administrator Billing Manager Billing Viewer

**Part 2: Using the Project Control Panel**

1. Navigate to **Reports > Dashboard > Project Accounting Reports**.
2. Under *Summary Reports*, select “Project Control Panel”.
3. Modify the report criteria as indicated below:

REPORT ON: All Projects I can see

CONTRACT: PM3-CONTRACT-FORECAST

DATE RANGE: Calendar – Current Year

SORTING OPTIONS:  Sort by Project

COLUMN OPTIONS:  A/R Balance     Funded Value     Status  
 Billing Type     Inception To Date     Total Value  
 Budget     Project Date Range     Year To Date  
 Current Period

ADJUSTMENTS:  Adjustments using Worked Date within range  
 Include Pending Adjustments

INCLUDE EXPENSE REPORTS:  Using Expense Report Completion Date within range

**COST SUMMARY & STATUS REPORT CLICK-THROUGH OPTIONS:**

COST REPORT NAME: UU\_PM Profit (Gross)

INDIRECT COST RATE:  Provisional

REPORTING PERIOD: Calendar:  Year  
1/1/2024 *Start Date*

NUMBER OF PERIODS: 1

ROW OPTIONS:  Show Actuals  
 Show Actuals Combined with  Budgets  
6/15/2024 *Use Actuals Through Date*

Calculate remaining plan/budget based on:  
 Remaining hours/expenses per work day

4. Press **Run Report**.
5. Open the **Project Reports** menu beside one of the projects and select “Org Activity” to review organization details and activity.
6. Return to the *Project Control Panel* report output, open the **Project Reports** menu beside each project, and select “Project Transactions” to review time and cost data.

Returning to the Project Control Panel, the *Project Periodic Cost Summary & Status* report displays true or burdened project costs based on the indirect rates and cost report definitions configured by the Administrator. This report can include actuals with plans or budgets to help forecast costs, revenue, and profit in future periods for all billing types. The project team should include actuals and assignments in the report criteria to gain insight into the profitability of their efforts. The following table describes how to assess the values in the report output:

TOTAL	
TO-DATE	ACTUALS & ALLOCATED BOT - EOT
Total profit rate for selected date range	Calculates profit rate range using the selected Cost Report Definition from the Beginning of Time through the End of Time

In this report, the key field to assess is the *Actuals & Allocated BOT-EOT* column. Each cost report element appears in its own row, where *the Actuals & Allocated BOT-EOT* column calculates profitability from beginning of time (BOT) through the end of time (EOT) for the selected project.

Enter the values for each project in the table below. Based on the corporate metrics above, is each project meeting or exceeding the corporate profit threshold?

PROJECT CODE		TO-DATE	TOTAL ACTUALS & ALLOCATED BOT - EOT
PM3-FORECAST-CP	<i>Actuals</i>		
	<i>Actuals &amp; Budgets</i>		
PM3-FORECAST-FP	<i>Actuals</i>		
	<i>Actuals &amp; Budgets</i>		
PM3-FORECAST-TM	<i>Actuals</i>		
	<i>Actuals &amp; Budgets</i>		

Using the *Project Revenue & Funding Summary* report provides a one-line summary analysis of project revenue compared to budgeted and funded values. The project team

should focus on the *TOTAL* area of the report output to assess whether an effort is over or under budget. The table below explains how the values in each section of the *TOTAL* area are derived:

TOTAL				
TO-DATE	BUDGETED	BACKLOG	FUNDED VALUE	REMAINING FUNDED
Total revenue for selected date range	<i>Labor:</i> Budgeted Bill \$ + <i>Expense:</i> Budgeted Bill \$	Budgeted – To-Date +: Budget > Revenue (-): Budget < Revenue	<i>Project Value:</i> Funded Value OR <i>Task Value:</i> Funded Value(s)	Funded Value – To-Date +: Funding > Revenue (-): Funding < Revenue

The key fields to evaluate in this report are *Backlog* and *Remaining Funded*. A positive *Backlog* value means the project is under budget while a negative value means the budget is being exceeded. A positive value in the *Remaining Funded* field indicates that there are unused funds available on the project, while a negative value indicates that funds may run out before the effort is complete.

**Part 3: Review Current Project Revenue**

1. Navigate to **Reports > Dashboard > Project Accounting Reports**.
2. Under *Summary Reports*, select “Project Revenue & Funding Summary”.
3. Modify the report criteria as indicated below:

*REPORT ON:* All Projects I can see

*PROJECT:* CS-GOV-CON – 253CONSULT PM3-FORECAST-CP  
 CS-GOV-CON – 253CONSULT PM3-FORECAST-FP  
 CS-GOV-CON – 253CONSULT PM3-FORECAST-TM

*DATE RANGE:* BOT to EOT

*FORECAST OPTIONS:* Include Actuals and Assignments for **Active Plan Sets**  
 6/15/2024 Use Actuals Through Date

Calculate remaining plan/budget based on:  
 Remaining hours/expenses per work day

*REPORTING OPTIONS:*  Calculate from Project Budgets/Funded Value

*INCLUDE EXPENSE REPORTS:*  Using Line Item Date within range  
 Include non-completed Expense Reports

4. Press **Run Report**.

Enter the values for each project in the table below. Based on the metric thresholds above, is each project meeting or exceeding the corporate revenue threshold?

		TOTAL	
PROJECT CODE	TO-DATE BOT - EOT	BACKLOG	REMAINING FUNDED
PM3-FORECAST-CP			
PM3-FORECAST-FP			
PM3-FORECAST-TM			

## Corrective Actions

To address the findings revealed by the periodic review, Unanet recommends using corrective actions to monitor and control project performance. There are three viable options to correct a project that is not meeting established metric thresholds: do nothing, rebaseline, or reforecast. In this lesson, you will review the circumstances under which each corrective action should be applied and how it should be implemented, then perform the appropriate corrective action for Gus Lead’s project.

### Corrective Action: Do Nothing

There are a few common reasons to “do nothing” despite a particular project or task exceeding the monitoring thresholds for one or more of the corporate KPIs. If project managers are aware of upcoming overtime or paid leave, anticipate expense reports being submitted shortly, or expect to receive subcontractor time or expense charges in the near future, the appropriate action is to do nothing until actuals have been submitted. Unanet recommends creating a Project Note to document the circumstances leading to a decision to do nothing during each periodic review.

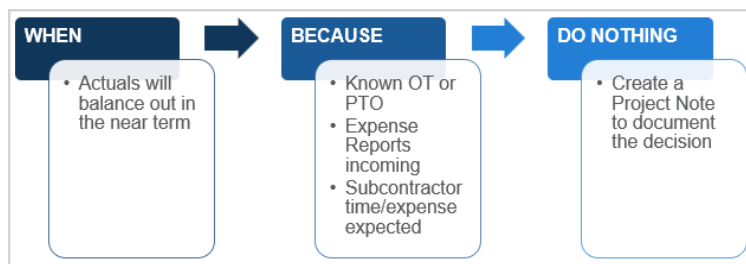


### Tour 3.2 – When and How to Do Nothing

Log in as Gus Lead ([glead/welcome](#)), the Project Lead. Users with the Project Manager role can also perform the recommended process.

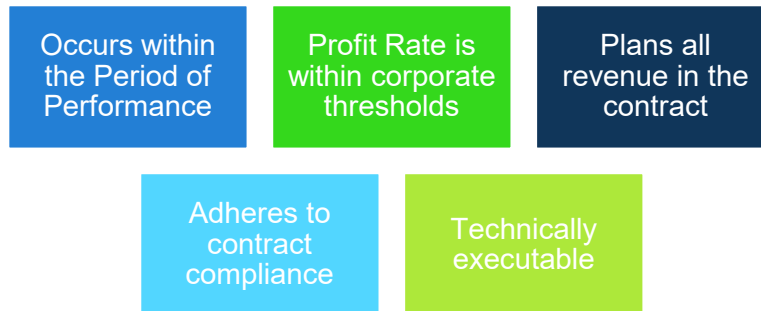
#### Tour Highlights

- Review the use of Project Notes and Note Types
- Add a Note to a Project



## Corrective Action: Rebaseline

When a project plan is no longer valid, it may be necessary to rework the plan in a process called rebaselining in which existing plans, assignments, and budgets are modified to ensure accurate reporting. For an active plan to be considered valid, it must meet the following criteria:



The project team may evaluate a project's current and forecasted performance, determine that the existing plan is no longer valid based on these guidelines, and decide to rebaseline the project plans. The Multiple Plan Set feature supports more complex planning of labor and expenses, including reforecasting, corporate budgeting, and scenario planning. Plan Sets are discussed in greater detail in the course [Unanet GovCon: Planning Project Resources](#).

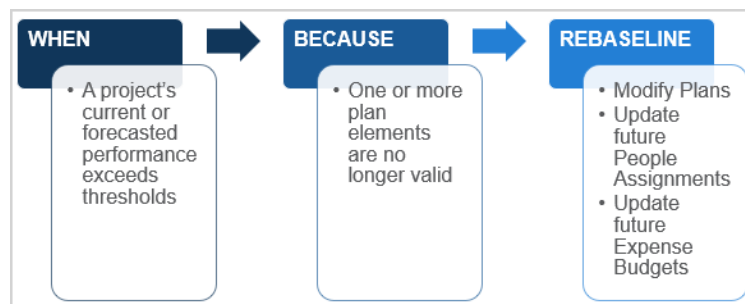


### Tour 3.3 – Creating a Revised Plan (Rebaselining)

*Log in as the Administrator, Fran Schaeffer (fschaeffer/welcome) to enable the use of multiple plan sets and generate plan set comparison reports.*

#### Tour Highlights

- Review use cases for multiple plan sets
- Modify plans and update future assignments and budgets



## Corrective Action: Reforecast

The concept of reforecasting a project's future efforts involves adjusting the upcoming People Assignments and Expense Budgets when it has been determined that the current plan remains valid. When key metrics like hours, revenue, and/or profitability are outside of the approved thresholds, or the team is aware of future changes to resources and/or requirements, reforecasting is a popular solution. This method works well when project teams regularly perform scheduled reviews and make required adjustments during those project reviews. The process of reforecasting includes the following recommended steps:

1. Choose a reforecasting method
2. Update People Assignments and Expense Budgets
3. Analyze updates using metric reports
4. Document the actions taken

## Reforecasting Methods

There are multiple ways to assess a project to determine whether and how to reforecast to get the project back into alignment. Two options used by many Unanet users to determine whether reforecasting is necessary include the project manager's insight and Unanet's Project Periodic Performance reports.

### Adjustments based on Project Manager Insight

Project team leads/managers may already know which changes the project needs, such as updates to resources, hours, or expenses. In this case, these necessary changes may result in the project's key metrics being outside of the accepted threshold.

### Adjustments based on Performance Reports

Several standard Unanet reports provide a forecast of cost or revenue information in a Daily, Weekly, Monthly, Semi-Monthly, Quarterly, or Yearly layout. Once a Project Manager determines whether their team has exceeded the assigned labor or expense budget for the period being reviewed, the PM can adjust the future assignments or budgets. Key reports that analyze performance are listed in the table below.

Report Name	Description
<b>PROJECT REPORTS (Time &amp; Expense Only)</b>	
<b>PERIODIC REPORTS</b>	
<b>Performance</b>	Compares plans, assignments, and actuals for selected projects in a daily, weekly, monthly, or quarterly grid



### Performance Line & Bar Chart

Compares plans, assignments, and actuals for selected projects in a daily, weekly, monthly, or quarterly bar graph with an option to include a cumulative line

#### Part 4: Review Project Performance

1. In a new browser tab, navigate to **Reports > Dashboard > Project Reports**.
2. Under *Periodic Reports*, select "Performance".
3. Modify the report criteria as indicated below:

*REPORT ON:* All Projects I can see

*PROJECT:* CS-GOV-CON – 253CONSULT PM3-FORECAST-FP  
CS-GOV-CON – 253CONSULT PM3-FORECAST-TM

*REPORTING PERIOD:* CALENDAR:  Semi-Month  
5/1/2024 *Start Date*

*NUMBER OF PERIODS:* 2

*ROW OPTIONS:*  Show Budgets  
 Show Actuals  
 Show Budget to Actuals Variance

*COLUMN OPTIONS:*  Show People  
 Show Projects  
 Show Labor Categories

*REPORTING OPTIONS:*  Include Pending Adjustments

4. Press **Run Report**.

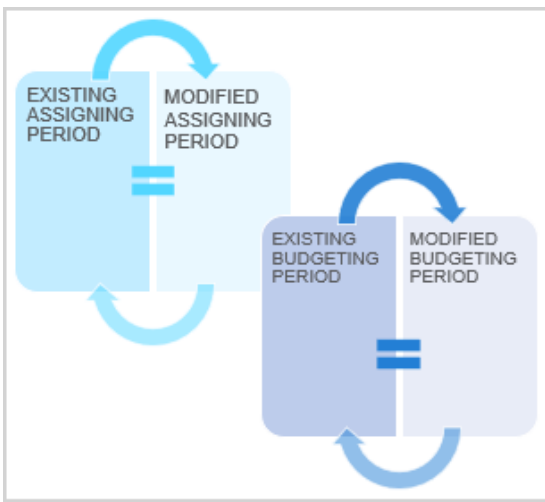
Meetings with the project team have indicated that issues with the product design are hindering the project's development. Based on the *People Periodic Performance* report output, which user is most impacted by the issues identified by the project team?

PROJECT PERFORMANCE	
PROJECT	PERSON
253CONSULT PM3-FORECAST-FP	
253CONSULT PM3-FORECAST-TM	

### Update People Assignments and Expense Budgets

Modifying People Assignments allows project teams to control which types of hours users can charge to a project in future periods. Expense Budgets do not control the expenses charged to a project but can be used to forecast, compare, and assess performance on reports.

There is one strict requirement for reforecasting in Unanet: the assignment or budget must be edited in the same increment in which it was created. This means that an assignment created using a weekly increment can only be edited in a grid using weekly periods. Unanet recommends matching the assignment increment to the increment in which you will review the performance of the assignment against the actuals. Attempting to modify a People Assignment or Expense Budget using a different time increment than the one used to create them will result in a grayed-out grid of read-only cells that cannot be edited. As with plans, assignments can only be edited in the same increment as created.

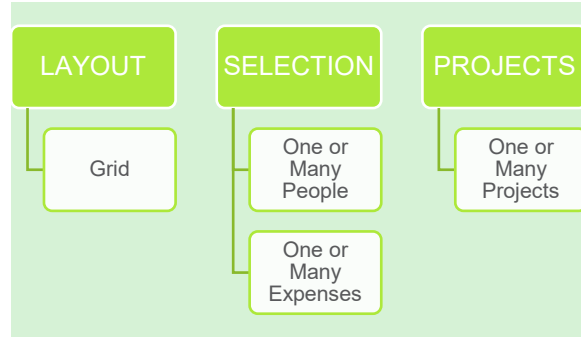


*Unanet will only allow a Person Assignment or Expense Budget to be modified if the new entry uses the same time increment. A mismatch between the existing increment and the new increment will result in a grayed-out read-only grid.*

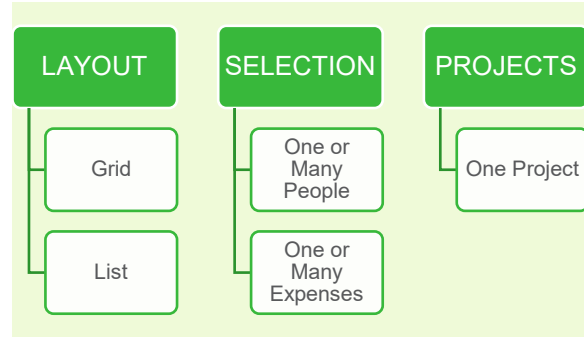
Generating a report using a forecasted view, which includes actuals and future assignments, will automatically repopulate any past assignments with the actuals for the selected period. This is the primary logic behind only updating the future assignments, and a powerful way for the project manager to control the end status of the project.

Unanet offers two methods for updating future assignments and/or budgets during reforecasting: the *People Assigner* or *Expense Budgeter* options within the Forecast menu, or the *Expense Budgets* and *People Assignments* menu options within a Project. Unanet recommends using the interactive *People Assigner* and/or the *Expense Budgeter* available in the Forecast menu to include the remaining periods for a project and update multiple projects at the same time.

### Forecast: People Assigner/Expense Budgeter



### Project: People Assignments/ Expense Budgets



## Using Metric Reports to Assess Adjustments

Part of updating the forecast is to evaluate the results against the same metric thresholds used to complete the project review. The table below outlines the key metric reports to use in a periodic review, including which fields are relevant based on the billing type of the project/task. The table is based on the use forecasted criteria, which is the total sum of project actuals plus the remaining people assignments and/or expense budgets. Unanet recommends using multiple browser tabs to view the *People Assigner* or *Expense Budgeter* grid alongside the report output displaying the metric of interest.

Project Revenue & Funding Summary <i>Includes Actuals + Future Assignments/Budgets</i>			
Remaining Funded =			
Funded Value – [Actuals To Date + Future Assignments/Budgets]	<b>Cost Plus</b> Within corporate thresholds	<b>Fixed Price</b> Depends on Billing Schedule	<b>Time &amp; Materials</b> Exactly zero

Project Periodic Cost Summary & Status <i>Includes Actuals + Future Assignments/Budgets</i>			
Profitability = $\frac{\text{Revenue}}{\text{Revenue} + \text{Future Assignments/Budgets}}$	<b>Cost Plus</b> Contractually defined	<b>Fixed Price</b> Within corporate thresholds	<b>Time &amp; Materials</b> Within corporate thresholds

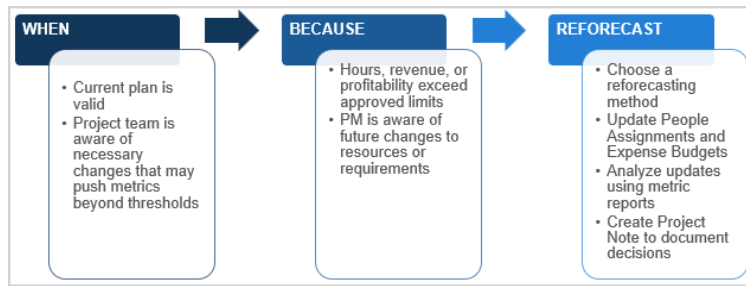


### Demo 3.4 – Reforecasting a Project

Log in as Gus ([glead/welcome](#)) to reforecast solutions to the issues below.

#### Demo Highlights

- Reforecast a Cost Plus project to reflect an increased expense budget
- Reforecast a Fixed Price project that will need to replace a resource
- Utilize Project Notes to document the results of metrics reporting and resulting decisions



## The Periodic Review: Decisions and Action Items

Based on the output of the reports run in Activity 3.1, which corrective action should Gus select?

253CONSULT PM3-FORECAST-TM			
PROJECT	ACTUALS & ALLOCATED	BACKLOG	REMAINING
BILLING TYPE	BOT - EOT		FUNDED
TM			

After meeting with the project team, Gus determines that the current Design Engineer on the TM project should be replaced by someone with more experience resolving the issues identified by the team. Gus also decides to allot 20 additional hours to the System Engineer assigned to that project to expedite the resolution process and reduce the project team’s need for overtime. After swapping Harriette’s project assignments, Gus will need to re-run the metric reports to assess the impact of the changes on profitability and remaining revenue. Finally, Gus will create a Project Note documenting the findings of the periodic review and assign it to the Contracts Manager.

### Corrective Action: Reforecast

1. Update future assignments to replace the existing Design Engineer with a more experienced resource starting June 16, 2024.
2. Increase the System Engineer’s project assignments by 20 hours for July 2024.
3. Rerun metric reports to assess the impact of the changes.
4. Create a Project Note and assign it to the Contract Manager.



### Activity 3.5 – Reforecasting a Project

Log in as Gus Lead (*glead/welcome*) to reforecast the project using the documented corrective actions and reevaluate the key metrics.

#### Activity Steps

## Part 1: Select a new Design Engineer

1. Navigate to **Reports > Dashboard > People Reports**.
2. In the *Periodic Reports* column, select “Resource Allocation” and modify the report criteria as indicated below:

*REPORT ON:* All People I can see

*PERSON: ORG CODE* GS-CYBER

*SKILLS:* Education – B.S. (Intermediate (2-5 years))  
Education – B.S. (Advanced (5-10 years))  
Education – B.S. (Expert (10-20 years))  
Education – B.S. (Jedi Knight (>20 years))

Language – Spanish (Intermediate (2-5 years))  
Language – Spanish (Advanced (5-10 years))  
Language – Spanish (Expert (10-20 years))  
Language – Spanish (Jedi Knight (>20 years))

Programming – C++ (Expert (10-20 years))  
Programming – C++ (Jedi Knight (>20 years))  
Programming – Java (Expert (10-20 years))  
Programming – Java (Jedi Knight (>20 years))

*PROJECT STATUS:* Open

*REPORTING PERIOD:* CALENDAR:  Month  
4/1/2024 Start Date

*NUMBER OF PERIODS:* 6

*REPORTING OPTIONS:* Include Assignments Only

*CELL OPTIONS:*  Show Booked Percent

3. Press **Run Report**.
4. Note the name of Harriette’s replacement: \_\_\_\_\_

## Part 2: Update the remaining People Assignments

1. Navigate to **Forecast > People Assigner**.
2. On the *Let’s start assigning* screen, select **Assignment Grid**.
3. On the *Assignment Setup* screen, select “Project Periodic Assignment” and press **Continue**.
4. Use the *Project List Filters* or the Search field to select the project “253CONSULT PM3-FORECAST-TM” and press **Continue**.
5. On the *Assignment Timeframe* screen, select **Specific Timeframe** with **12** “Calendar Semi-Months” from **06/16/2024**, press **Select Date**, then press **Continue**.

6. On the row for the user “Harriette Anderson”, select the **three-dot menu** and select **Swap Person**.
7. In the *Swap Person* window, select “Gerald Jefferson” and press **Apply**.
8. In the row for the user “Henry Douglas”, select the cell *JUL-16* and add **20 hours**.
9. Press **Save Assignment**.

**Part 3: Re-run the metric reports to review the impact of the changes**

1. Navigate to **Reports > Dashboard > Project Accounting**.
2. In the *Summary Reports* column, select the report “Project Revenue & Funding Summary” and modify the report criteria as indicated below:

*REPORT ON:* All Projects I can see

*PROJECT:* CS-GOV-CON – 253CONSULT PM3-FORECAST-TM

*DATE RANGE:* 6/15/2024 to 12/31/2024

*FORECAST OPTIONS:* Include Actuals and Assignments for **Active Plan Sets**  
5/31/2024 Use Actuals Through Date

Calculate remaining plan/budget based on:

- Remaining hours/expenses per work day
- Using Line Item Date within range

*INCLUDE EXPENSE REPORTS:*  Include non-completed Expense Reports

3. Press **Run Report**.

**Part 4: Create a Project Note to document the project review**

1. Navigate to **Contracts > Project > List**.
2. On the **Search** tab, use the *Project Org. Code* field to view all “253CONSULT” projects.
3. Open the **List** tab and select the **edit icon** for the project “253CONSULT PM3-FORECAST-TM”.
4. In the project menu, select **Notes**.
5. Press the **Add Project Note button** and enter the data shown below:

ADD NOTE FOR 253CONSULT PM3-FORECAST-TM:	
Note Title:	June 2024 Project Review
Note Description:	Completed review; swapped Design Engineer for a more senior engineer to solve ongoing design issues; increased hours needed for System Engineer. Impact to revenue has created a greater negative funding situation; need to review ways to complete project within available funding or request more funding. Additionally, the new engineer added to the project has reduced profit by a significant amount.

NOTE DETAILS:	
Note Type:	Status Report (Status Report) <span style="float: right;">Due Date: 06/15/2024</span>
Note Status:	3-WORKING (Assigned and being worked)
PERSON ASSIGNED TO THE NOTE:	
Assignee:	Contracts, Dana
NOTE ACCESS:	
<input checked="" type="checkbox"/> Allow Access by Role: <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Project Approver</li> <li><input checked="" type="checkbox"/> Project Lead</li> </ul>	

6. Press **Save**.

## Check Your Understanding



In which of the following scenarios is “do nothing” the appropriate response to a project or task exceeding the monitoring thresholds for one or more of the corporate KPIs? *Select all that apply.*

- a) Expected overtime
- b) Expected expense reports from subcontractors or vendors
- c) Expected expense reports from Expense Users
- d) Matrixed staff that migrate between projects/tasks



Which Properties setting will enable a user with the Project Lead role to access Project Accounting reports like the *Revenue Funding Summary*?

- a) Allow Cost Reporting For Non-Cost Rate Managers
- b) Allow Project Cost Reporting For Non-Cost Rate Managers
- c) Allow Project Margin Reporting For Non-Cost Rate Managers



If the “Remaining Funded” total on a *Project Revenue & Funding Summary* Report is a positive value, then which of the following statements is true?

- a) The calculated revenue is less than the total “Funded Value”
- b) The calculated revenue is more than the total “Funded Value”
- c) The calculated revenue equals the total “Funded Value”



Refer to APPENDIX A for answers to the *Check Your Understanding* questions



# APPENDIX A: CHECK YOUR UNDERSTANDING ANSWER KEY

## LESSON 1: PROJECT SETTINGS BY BILLING TYPE



Which billing type has its billing and revenue determined by the settings in the project *Billing* section?

- a) CP
- b) FP
- c) TM



Under which circumstances would Labor Categories be configured on a Fixed Price project?

- a) Labor Categories should be configured on all new projects
- b) The client wants their reports based on Labor Categories
- c) The project requires Labor Categories for Time reporting



Which billing type can include a percentage markup on expenses?

- a) CP
- b) FP
- c) TM

## LESSON 2: PROJECT APPROVALS



Which of the following Project Administrator roles can use the ETC wizard to summarize ETC for a Project or Task?

- a) Project Approver
- b) Project Manager
- c) Resource Assigner



How is the Project Approver role assigned?

- a) In the Person Profile on the Roles tab
- b) In the Project Administrators submenu
- c) In the Project Profile on the Access tab

## LESSON 3: MONITORING AND CONTROLLING PROJECT PERFORMANCE



In which of the following scenarios is “do nothing” the appropriate response to a project or task exceeding the monitoring thresholds for one or more of the corporate KPIs? *Select all that apply.*

- a) Expected overtime
- b) Expected expense reports from subcontractors or vendors
- c) Expected expense reports from Expense Users
- d) Matrixed staff that migrate between projects/tasks



Which Properties setting will enable a user with the Project Lead role to access Project Accounting reports like the *Revenue Funding Summary*?

- a) Allow Cost Reporting For Non-Cost Rate Managers
- b) Allow Project Cost Reporting For Non-Cost Rate Managers
- c) Allow Project Margin Reporting For Non-Cost Rate Managers



If the “Remaining Funded” total on a *Project Revenue & Funding Summary Report* is a positive value, then which of the following statements is true?

- a) The calculated revenue is less than the total “Funded Value”
- b) The calculated revenue is more than the total “Funded Value”
- c) The calculated revenue equals the total “Funded Value”

# APPENDIX B: SUPPLEMENTAL INFORMATION

## Reference Links

[Unanet GovCon Glossary of Terms](#)

[Sys Doc | Approval Order \(Project And Manager Approvals\)](#)

[Sys Doc | Estimated Total \(ET\) or Estimate To Complete \(ETC\)?](#)

[GC | Sys Doc | Time – ETC \(Estimate to Completion\)](#)

[GC | Sys Doc | Reports – Project – Periodic - Performance](#)

[GC | Sys Doc | Reports – Project – Periodic – Forecast](#)

[GC | Sys Doc | Reports – People – Periodic – Resource Allocation](#)

[GC | Sys Doc | Reports – Resource – Periodic – Resource Allocation](#)

[GC | Sys Doc | Reports – Project – Actuals - Summary](#)

[GC | Sys Doc | Reports – People – Time Details](#)

[GC | Sys Doc | Reports – Project Accounting – Project Revenue & Funding Summary](#)

[GC | Sys Doc | Reports – Project Accounting – Periodic – Cost Summary & Status](#)

[GC | Sys Doc | Reports – Project Accounting – Project Summary by Cost Element](#)

[Sys Doc | Portfolio \(THREAD\) Proposal Plans – Assign – Reforecasting From Plans](#)

[Sys Doc | Portfolio \(THREAD\) - Proposal Plans – Assignments – Reforecasting From Assignments](#)

[Sys Doc | How Can I Limit Billing And Revenue To A Contract's Funded Value?](#)

[Sys Doc | Funded Value Best Practices](#)



## NEXT STEPS

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