Unanet University

UNANET GOVCON:
PLANNING PROJECT RESOURCES

PARTICIPANT GUIDE

Last Revised July 2023

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ABOUT THIS PARTICIPANT GUIDE

This document serves as a supplement to the training courses offered through Unanet University at www.unanetuniversity.com. 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:

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

Unanet University Contact Information

Send questions to 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.

Support Portal

Use Unanet's Support Portal support.unanet.com to access product reference articles and FAQs. To obtain a Support Portal ID, send an email to support@unanet.com with the subject "Support Portal ID request".

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

- The "from" address must match the domain of your company
- It must NOT be a generic email account (e.g., gmail.com)

COURSE INTRODUCTION

In this course, you will apply Unanet's recommended practices to identifying the resources your projects need and creating plans and budgets based on corporate thresholds and contract stipulations. Additionally, you will generate reports to assess project plans and assignments, and determine which, if any, corrective action is necessary.

Recommended roles: Administrator, P&R Administrator, Project Manager, Project Viewer, Resource Requestor, Resource Planner, Resource Assigner, Bill Budget Viewer, Billing Viewer, Cost Budget Viewer

Learning Objectives

In this course, **Unanet GovCon: Planning Project Resources** participants will:

- Identify project labor resources by skills and availability.
- Create and modify plans for labor and expenses on a project.
- Evaluate project performance and reforecast resource allocation, as necessary.

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; username is not.

Company Role	Unanet Role	Name	Unanet login Username	Password
Project Manager	**Manager–**approve time and expenses, generate reports for users assigned to their approval groups **Project Lead–**access to limited project settings and Project reports **Resource Assigner–**manages project assignments, has limited Organization Access to Resource reports **Resource Planner–**manages project plans, has limited Organization Access to Resource reports	Gus Lead	**glead**	**welcome**

LESSON 1: SELECTING RESOURCES

Learning Objectives

Identify project resources by skills and availability

- Describe Unanet system requirements for utilizing TBD Users and UnaSource Users
- Generate reports to identify available resources with the necessary skills for a project

Introduction

Unanet's planning features are available within the Project Portfolio and Project Portfolio Plus licenses. Project Portfolio Plus includes the option to use the **UnaSource User** role, which makes users available to be planned on a project. Unanet Portfolio Plus licenses are reduced-rate licenses used for planning purposes only and cannot be associated with actuals. When **UnaSource User** is enabled as the only role on a Person Profile, the user will be counted as a UnaSource Only license, which does not count against the total user count; when enabled in conjunction with other roles, the user will be counted as a full Project Portfolio license.

Unanet Project Portfolio Plus or Project Portfolio Financials Plus licenses provide the option to create a **TBD Planning Resource** which may either be a real person OR a placeholder until a real person can be found to complete the work. If a resource is assigned the **TBD Planning Resource**, they will automatically be assigned the **UnaSource User** role as well, and all other roles will be disabled. **TBD Planning Resource** users do not log in or create actuals, and may be excluded from certain reporting values, e.g., capacity on the Headcount report; however, they are immensely helpful in planning ghost/stretch/unknown or unnamed resources until a named resource is made available. A resource may use a **UnaSource User** license to be available for planning without being a **TBD Planning Resource** to include them in capacity reporting. However, resources will typically be assigned both of these roles to utilize a UnaSource license while excluding the resources from capacity on reports.

Planning people on a project requires the **Resource Planner** role. If a user also has the **Resource Assigner** role, the same user can create plans and assignments on the same screen. Plans and proposals can be created with TBD Planning Resource or UnaSource Only licenses then assigned to full license users in Unanet once the project is approved/won without having to recreate the plans. Projects can also be planned with resources that have not yet been hired or known in Unanet when a proposal is generated.

Using Reports to Identify Project Resources

While there are many ways to set up a plan, there are specific Unanet planning methodologies and reports that provide an analytical view of the project plans in place. Identifying users with the necessary skills and availability to fulfill project needs can be expedited using dedicated Unanet reports.

The *Resource Reports* section of the Reports dashboard is only available with the Project Portfolio license.

Tour 1.1 – Review Resource Reports

Log in as the Project Lead, Gus Lead (glead/welcome).

Tour Steps

1. Navigate to **Reports > Dashboard** and scroll down to *Resource Reports*.
2. Review the reports that identify users based on their skills and availability.

Users with the **Resource Assigner** or **Resource Planner** roles may access the *Resource Reports* section of the Reports dashboard. Users without these roles can access the versions of these reports available in the *People Reports* section.

Report Name	Description
DETAIL REPORTS	
Skill Profile	Provides a list of all skills, including proficiency level, associated with specific users
PERIODIC REPORTS	
Resource Allocation	Answers a variety of questions regarding how booked a user is, in terms of actual hours, assigned hours, or planned hours (optionally, requested leave can be included as booked hours) in a period by period layout with color coding to help flag individuals that fall into a particular booked percentage range. The version available in the *People Reports* section includes the ability to select a user's name in the report output to view additional details.
Resource Allocation Bar Chart	Provides information regarding how booked resources are in terms of either plans, assignments, or actuals (optionally, requested leave can be included as booked hours) in a periodic bar chart format. Allocation colors and percentiles can be customized. Each bar in the chart can represent the number of people whose allocation falls within the user-defined percentile for the period.

Locating Resources Based on Skills and Availability

The Business Development team at MyCo would like to submit a proposal for a high-value contract. The team needs to know if there are any employees or subcontractors that possess “Jedi Knight”-level Python programming skills. Once those users have been identified, the BD team needs further confirmation that those resources are not currently planned to work on another billable project.

Activity 1.2 – Using Reports to Identify Resources and Their Availability

Log in as Gus Lead (glead/welcome).

Activity Steps

Part 1: Identify Resources Based on Necessary Skill

1. Navigate to **Reports > Dashboard > Resource Reports > Detail Reports**.
2. Select *Skill Profile*.
3. Select the report criteria as indicated below:

Report On:	All Resources I can see
Person Org Code:	GS-SE
Skill Type:	Programming
Skills:	Python (Jedi Knight (>20 years))
Reporting Options:	Sort by Person, Skill Type, Skill

4. Press **Run Report**.
5. Note which user(s) have the necessary skill for the contract:

Resources

Part 2: Identify Resource Availability Based on Necessary Skill

1. Navigate to **Reports > Dashboard > Resource Reports > Periodic Reports**.
2. Select *Resource Allocation*.
3. Select the report criteria as indicated below:

Report On:	All Resources I can see
Person Org Code:	*GS-SE*
Skills:	Programming
Skill Type:	Python (Jedi Knight (>20 years))
Project Status:	Open
Capacity:	Business Week Hours
Reporting Period:	Calendar – Month *Start Date:* 1/1/2022
Reporting Options:	Include Plans Only
Booked % Color:	0-89% use Red ●
	90-109% use Green ●
	110-999% use Yellow ●

4. Press **Run Report**.
5. Note which user(s) with the necessary skill for the contract are available each month.

PERSON	JAN	FEB	MAR	APR	MAY	JUN

PERSON	JUL	AUG	SEP	OCT	NOV	DEC

Check Your Understanding

Which Unanet report can help to determine which users are available to plan on a project?

a. Resource Allocation
b. Schedule Details
c. Periodic Performance

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

LESSON 2: PLANNING LABOR AND EXPENSES

Learning Objectives

Create and modify plans for labor and expenses on a project

- Describe the system and user requirements to create project plans
- Create and modify project plans and budgets

Introduction

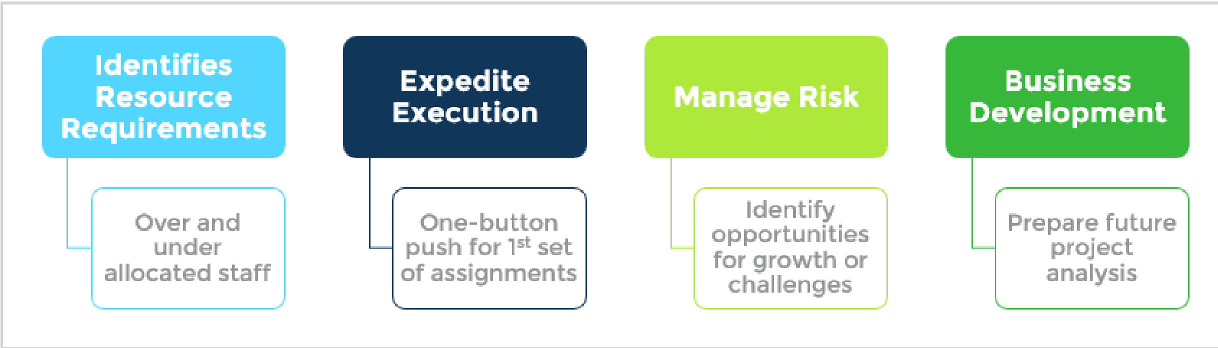
Unanet's planning features are available within the Project Portfolio and Project Portfolio Plus licenses. Project Portfolio provides licensed users with the option to have the **UnaSource User** role, which makes them available to be planned on a project. The Portfolio Plus license provides a unique feature to allow a resource planner to use Planning Only users. Planning Only users do not log in or create actuals; however, they are immensely helpful in planning ghost/stretch/unknown or unnamed resources until a named resource is made available.

Expense plan entries can be created at the project or task level. Expenses are not associated with specific users on a project; they are associated through plans and budgets at the project or task level. These planned amounts do not currently constrain the entry of actuals but are used for comparative reporting and analysis purposes.

The value entered into the expense plan should be the "direct cost" value. Unanet will use the billing type of the project or task to calculate the appropriate billable or total cost values for the reports.

Planning people on a project requires the **Resource Planner** role. If a user also has the **Resource Assigner** role, the same user can create plans and assignments on the same screen. Expense planning on a project requires the user to have the **Project Manager** or **Project Lead** role.

The Benefits of Planning



Planning in the Grid

Unanet offers several ways to plan resources on projects; this lesson focuses on the grid planner. The grid planner is an Excel-like tool for selecting resources on projects and associating those resources with cost and bill amounts. Reports can be run against planned resources to view total costs and bill amounts. Unanet users can use the grid planner for bid and proposal work, budgeting, and project forecasting.

Grid planners are available directly within a project's menu, where users may be planned on a single project. While this menu provides increased insight for features like multiple plan sets, it does limit the ability to plan or budget users to multiple projects. There is also the *People Planner*, a grid planner available through the **Forecast** menu that allows project planning for many users or expense planning on many projects at the same time. This type of grid provides increased visibility not typically available on a single project.

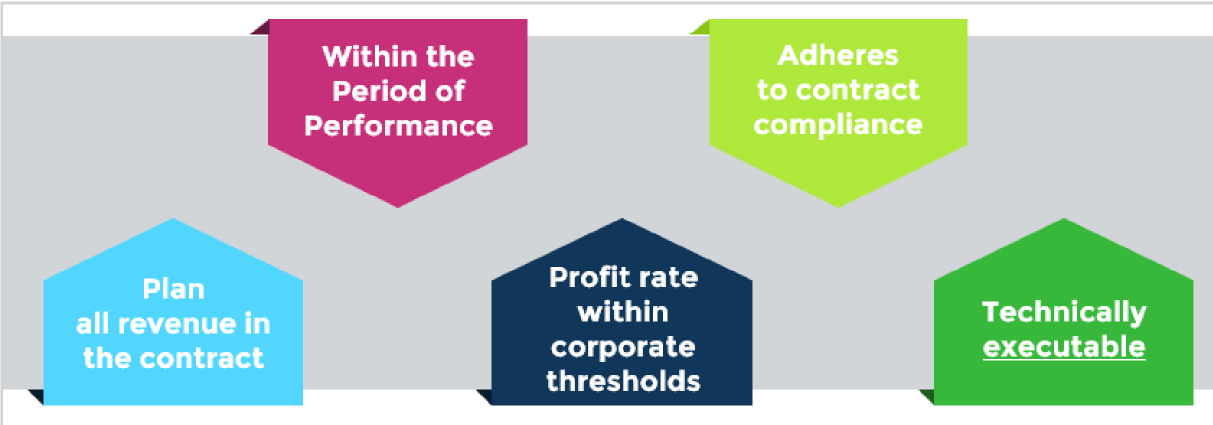
Using Grids to Create a Project Plan

Project plans can be created for both people (labor) and expenses (materials and/or items). While an individual plan can be created, the grid allows for many planning increments to be created at the same time.

The single most important concept to understand about planning (or assigning) resources or expenses is the increment used to create the plan. Plans (and assignments) can only be edited in the exact same increment as when they were created. As such, a monthly plan can only be edited in the future if a grid is created using a monthly period when creating a grid for editing purposes.

Reporting on plans (or assignments) can be displayed in many increments, regardless of the increment used to create the plan (or assignment).

Elements of a Valid Plan



Recommendations for Creating a People Planning Grid

- **Plan View**: Plan at the Project or Task level. If the project has "Manage at Task level" enforced, and you intend to create assignments from plans, choose to plan at Task level.
- **Planning Periods**: Choose a time period that best suits your planning periods and use this same increment consistently for all planning grids on all projects. Using your timesheet period as a planning increment provides the most flexibility with reports and management efforts. Not adhering to this recommendation may result in a view-only, grayed-out grid that will not allow editing due to a mismatch between the original increment and the new increment.
- **Number of Periods**: Use the entire period that you intend to plan using the project start and end dates.

Editing an Existing Planning Grid

The people planning grid entries include customization options like task selection, budgeting by hours or utilization, which bill rates and cost rates to use, swapping plans to a different person and a myriad of fields that can be derived by the system based on the project's setup. Within the project people planning grid, there are additional features that Unanet recommends utilizing to enable efficient modification of multiple planning periods at once:

- **Multiple Ways to Enter Plan Data**: Double-clicking a Person's name will open an Edit screen to update all planning periods for that person. The same action in a single planning cell opens the edit screen for that single increment for that individual person. Double-clicking a column header will edit that increment for all users in the grid. Double-clicking in the top left corner of a grid opens the Edit screen for all users for all increments in the grid.

- **Bill Rate**: Allow the bill rates to derive directly from the project-level Labor Category configuration. This will ensure that any escalation rates are used in the appropriate period.
- **Cost Rate**: Allow the cost rate to derive from the Person profile to ensure that any escalation rates are used in the appropriate period. However, it may be logical to override the cost rate if planning records are using either TBD resources or a fixed cost rate for a subcontractor.
- **Cost Element**: Allow the system to derive the cost element as this field is time-bound on the cost rate record in the Person profile and will always provide the correct cost rate based on the date.
- **Labor Category**: Unanet strongly recommends selecting the desired Labor Category for the user to ensure that it is correct. Allowing the system to derive the default will likely result in the wrong result; Person defaults can be changed by an Administrator, thus systematically changing the Labor Category and bill rate on any project where the user's Person default was used in a plan and/or assignment. For Time & Materials projects, this would result in inaccurate billing. In projects with other billing types, this would change the nature of which Labor Category was necessary to perform the work. Therefore, it is recommended to specifically select the Labor Category that represents the work needed to be performed. This ensures that the people plan will have the correct Labor Category and bill rate.

Swapping Resources in the Planning Grid

The "swapping" feature in the planning grid is a quick way to move all components of a plan from one user to another. Swapping is especially useful when the original plans were created with placeholder resources like TBD Planning Resources, and named resources need to be selected to execute the project. Swapping can also be used for transferring plans from one named resource to another.

To swap resources on a project, select the Person that has the desired plan and the resource you wish to swap the plan to. Resources in Unanet cannot have overlapping plans in the same project/task/increment, so you must confirm the availability of the target resource before attempting to swap. If the target resource has an existing plan for the same project, task, or increment, they will not appear available to swap.

The recommendations for creating and editing a People Planning Grid also apply to the People Assigner Grid on a project.

Demo 2.1 – Creating and Editing Plans in the People Planning Grid

Log in as the Project Lead Gus Lead (glead/welcome).

Demo Steps (Part 1) (Part 2)

1. Review the key features of the People Planner Grid within a project.
2. Set up a planning grid and save the criteria for future use.
3. Create new plans using four different methods.

Activity 2.2 – Grid Planning at the Project Level

Log in as Gus Lead (glead/welcome) to create a project plan without tasks using the grid feature.

Activity Steps

Part 1: Set Up the Planning Grid Criteria

1. Navigate to **Contracts > Project > List**.
2. Using the filter options on the **Search** tab, find and select the project "TRILOBITE RSMGNT-PLANNING-PRJ-LVL".
3. Open the **List** tab.
4. Select the **edit icon** for the project.
5. In the project menu, navigate to **People Plans > Plan with Grid**.
6. On the **Search** tab, select the criteria as indicated in below:

PLAN FOR	
PLAN VIEW:	Project
PLANNING PERIODS:	Calendar Months (Period Type) 12 (Number) 1/1/2022 (Start Date)
BUDGET IN:	⊙Hours ○Utilization
PEOPLE TO PLAN	
PERSON: GS-SE ORG. CODE	Guster, Burton Lassiter, Carlton Ruiz, Antonio
GRID CONTENTS	

DISPLAY OPTIONS:	☑ Include Subtotals
	☑ Show Project/Task Dates
	☑ Show Project/Task Budget Hours

7. Press **Save Criteria**, rename the plan “TRILOBITE Grid Plan – Project”, and press **Save**.
8. Select the **Plan** tab to view the grid.

Part 2: Plan Resources in the Grid

1. **Double-click on the row** for the user “Burton Guster” and modify the *Plan Edit* window as indicated below:

   PLAN LABOR
   Hours: 80 ☑ Enable Budget field for updates
   MISCELLANEOUS
   Labor Category: Business Systems Analyst

2. Press **Save**.
3. **Double-click the first monthly increment cell** for the user “Carlton Lassiter” and modify the *Plan Edit* window as indicated below:

   PLAN LABOR
   Hours: 80

   MISCELLANEOUS
   Labor Category: Business Systems Analyst

4. Press **Save**.
5. **Check the box** on Carlton Lassiter’s row.
6. In the *Number of periods to shift selected items left or right* field below the grid, **enter** “2”.
7. Press **Shift Right,** then **Save**.
8. **Select the first monthly increment cell** for the user “Antonio Ruiz” and enter 40 hours.
9. Press **Save**.

Activity 2.3 – Grid Planning at the Task Level

Remain logged in as Gus Lead (glead/welcome) to create a project plan with tasks using the grid function.

Activity Steps

Part 1: Set Up the Planning Grid Criteria

1. Navigate to **Contracts > Project > List**.

2. Using the filter options on the **Search** tab, find and select the project "TRILOBITE RSMGNT-PLANNING-TSK-LVL."
3. Open the **List** tab.
4. Select the **edit icon** for the project.
5. In the project's left side menu, navigate to **People Plans > Plan with Grid**.
6. On the **Search** tab, select the criteria as indicated below:

PLAN FOR	
PLAN VIEW:	Tasks for many people
PLANNING PERIODS:	Calendar Months 12 1/1/2022 *Period Type* *Number* *Start Date*
BUDGET IN:	⦿Hours ○Utilization
PEOPLE TO PLAN	
PERSON: GS-SE *ORG. CODE*	Guster, Burton Lassiter, Carlton Ruiz, Antonio
GRID CONTENTS	
DISPLAY OPTIONS:	☑ Include Subtotals ☑ Show Project/Task Dates ☑ Show Project/Task Budget Hours

7. Press **Save Criteria**, rename the plan "TRILOBITE Grid Plan – Tasks", and press **Save**.
8. Select the **Plan** tab to view the results in the grid.

Part 2: Plan Resources in the Grid

1. Under the task "2. Design Specs" **double-click on the row** for the user "Burton Guster" and modify the *Plan Edit* window as indicated below:

   PLAN LABOR
   Hours: 80 ☑ Enable Budget field for updates

   MISCELLANEOUS
   Labor Category: Business Systems Analyst

2. Press **Save**.
3. Under the task "3. Product Development (1/1/2022 – 12/31/2022)", **double-click the first monthly increment cell** for the user "Carlton Lassiter" and modify the *Plan Edit* window as indicated below:

   PLAN LABOR
   Hours: 80

   MISCELLANEOUS
   Labor Category: Business Systems Analyst

4. Press **Save**.

5. **Check the box** on this user's row.
6. In the *Number of periods to shift selected items left or right* field below the grid, **enter** "2".
7. Press **Shift Right,** then **Save**.
8. Under the task "1. Project Management (1/1/2022 – 12/31/2022)"**, select the first monthly increment cell** for the user "Antonio Ruiz" and enter 40 hours.
9. Press **Save**.

Viewing and Modifying Project People Plans

Once People Plans have been created within a project, the People Plans List provides a straightforward way to view the details of those plans in a single row. This List view includes a unique feature that uses font color to indicate from where the data in a row was obtained: plan data in black indicates an explicit selection or entry that will be used to calculate costs and revenue, while plan data in gray indicates a system-derived value based on system configuration. Derived data can change at any time if the system configuration or data is modified.

Unanet recommends explicitly selecting the Labor Category in a People plan and allowing the bill rate to be derived from the Labor Category configuration at the project level. Not doing so will likely result in the wrong Labor Category and bill rate being derived by the system.

Demo 2.4 – Review Project People Plans and Create Assignments From Plans

Log in as Gus Lead (glead/welcome), who has the required Resource Planner role to view the People Plans List.

Demo Steps

1. Review the **People Plans > List** view for a project.
2. Review the data explicitly selected/entered versus the system-derived defaults.
3. Discuss how the system derives a default Labor Category.
4. Create People Assignments from the People Plans.

Correcting People Plan Records

Juliette O’Hara is supposed to be planned as a System Engineer at a bill rate of $195.00 per billable hour. While hours were planned for Juliette at the project level, the Resource Planner did not choose a Labor Category. The result is that the system will try to derive a default value from the existing system configuration. The system will first try to use the Labor Category on the Time tab of the Person Profile. If this Labor Category is also available at the project level, it will select the Person Profile Labor Category. Otherwise, it will use the first Labor Category listed in the project-level Labor Categories. For this reason, Unanet recommends <u>always</u> selecting the Labor Category on all People Plans and People Assignments.

Activity 2.5 – Modify a People Plan

In the preceding demo, we noted that the Labor Category for one of the selected resources is incorrect, which will lead to inaccurate reporting and billing for the project. Log in as Gus Lead (glead/welcome) and **select one** of the following options to correct the resource’s Labor Category.

Activity Steps

Option 1: Manually Edit Each Planning Record

1. Navigate to **Contracts > Project > List**.
2. Use the *Project Code* field to filter for “RSMGNT-PLANNING-LIST-VIEW”.
3. Open the **List** tab and select the **edit icon** for the project.
4. Scroll down to **People Plans > List**, open the **List** tab, and select the **edit icon** for the user “Juliette O’Hara”.
5. In the *Miscellaneous* section, select “System Engineer” from the *Labor Category* dropdown list.
6. Press **Save**.

Option 2: Create a Planning Grid for the Increment to Modify All Records

1. In the project’s **People Plans > Plan with Grid** option, modify the criteria on the **Search** tab as indicated below:

PLAN FOR	
PLAN VIEW:	Project
PLANNING PERIODS:	Calendar Months 1 1/1/2022 *Period Type Number Start Date*
BUDGET IN:	⦿Hours ○Utilization
PEOPLE TO PLAN	
PERSON:	O’Hara, Juliette
GRID CONTENTS	

DISPLAY OPTIONS:	☑ Include Subtotals ☑ Show Project/Task Dates ☑ Show Project/Task Budget Hours

2. Select the **Plan** tab and **double-click** on the user's name.
3. Modify the *Plan Edit* window as indicated below:

Person:	O'Hara, Juliette	
PLAN LABOR *Hours*:	40	☑ Enable Budget field for updates
MISCELLANEOUS *Labor Category*:	System Engineer	

4. Press **Save**.

Option 3: Export, Modify, and Import the Plan Records

1. From the project menu, navigate to **People Plans > Export**.
2. Select the export criteria as tab as indicated below:

Person:	O'Hara, Juliette
Date Range:	Calendar – Previous Year

3. Press **Export** and save the .csv file.
4. Open the .csv file, enter "System Engineer" in the column *labor_category*, and update the format of the columns *begin_date* and *end_date* to "yyyy-mm-dd" format.
5. Navigate to **People Plans > Import**, select the modified .csv file, and press **Import**.

Using Reports to Validate Plans and Budgets

Once labor and expenses have been planned for a project, Unanet recommends using specific Project Accounting reports to confirm that the plans can achieved the desired profitability without exceeding contracted stipulations for time, cost, and scope.

Tour 2.6 – Validating Plans with Project Accounting Reports

Log in as the Project Lead, Gus Lead (glead/welcome).

Tour Steps

1. Navigate to **Reports > Dashboard** and scroll down to *Project Accounting Reports*.

2. Review the reports that summarize project costs and revenue based on plans and actuals.

Report Name	Description
PERIODIC REPORTS	
Cost Summary & Status	Provides a periodic view of time charged to a project by Cost Element, displayed in Week, Month or Quarterly increments; projects must have a Cost Structure defined to be included; report includes actuals from timesheets and expense reports in any status, and from financial document labor, expense, and item detail lines
SUMMARY REPORTS	
Revenue & Funding Summary	Provides a one-line summarized view of revenue and funding by project, task, or task roll-up

Activity 2.7 – Generate Reports to Validate Project Plans

Log in as the Project Lead, Gus Lead (glead/welcome).

Activity Steps

Part 1: Generate the Cost Summary & Status Report

1. Navigate to **Reports > Dashboard > Project Accounting**.
2. In the *Periodic Reports* table, select "Cost Summary & Status".
3. Select the report criteria as indicated below:

Report On: All Projects I can see

Project: GS-SE – TRILOBITE RSMGNT-C01-INNOVATION-L
GS-SE – TRILOBITE RSMGNT-GENERAL-PROJECT

Cost Report Name: PM-JSR

Indirect Cost Rate: ◉ Provisional

Reporting Period: *CALENDAR:* ◉ Year
Calendar – Previous Year 1/1/2022 *Start Date*

Number Of Periods: 1

Row Options: *Show Actuals Combined with* ◉ Plans for Active Plan Sets
5/31/2022 *Use Actuals Through Date*

Calculate remaining plan/budget based on:

◉ Remaining hours/expenses per work day

Include Expense Reports: ◉ Using Line Item Date within range
☑ Include non-completed Expense Reports

4. Press **Run Report**.

Part 2: Generate the Revenue & Funding Summary Report

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

Report On: All Projects I can see

Project: GS-SE – TRILOBITE RSMGNT-C01-INNOVATION-L
GS-SE – TRILOBITE RSMGNT-GENERAL-PROJECT

Date Range: BOT *to* EOT

Forecast Options: Include Plans Only *for* Active Plan Sets

Reporting Options: ◉ Calculate from Project Budgets/Funded Value

4. Press **Run Report.**

Creating People Assignments via Plans

People Assignments for labor and expenses are controlled either at the project level, with no specific task identified for charging, or with an explicit task associated with each person assignment. Practicing these recommended settings can minimize end-user errors and support the project management team with controlling the schedule, cost, and scope of a contract.

While Plans and Assignments both have the validation of not overlapping another period, they do not share all the same validation rules. For example, Plans can be created at either the project or the task level, whereas assignments/budgets can only be created at the level indicated by the project’s Project Management Level setting.

Unanet recommends creating people assignments using the People Plans function to assign directly from the plans. However, it is important to understand that the assignments will validate against the Project Management Level setting. If the plans were created without tasks and the Project Profile has the *Manage at Task Level* option enabled, the system will return a validation error. For this reason, the Project Management Level setting should be checked before deciding whether project plans will be created at the project or task level, and whether those plans will be used to create the initial project assignments.

Activity 2.8 – Create People Assignments from Plans

Log in as Gus Lead (glead/welcome) to create people assignments using the project people plans as the source of assignment information.

Activity Steps

1. Navigate to **Contracts > Project > List**.
2. Using the filter options on the **Search** tab, find and select the project "TRILOBITE RSMGNT-ASSIGNMENTS-FROM-PLANS".
3. Open the **List** tab.
4. Select the **edit icon** for the project.
5. Note the setting(s) selected in the *Project Management Level* section.

Project Management Level:	☐ MANAGE AT TASK LEVEL ☐ Require Tasks for Time Reporting ☐ Require Tasks for Expense Reporting ☐ Require Tasks for Item Reporting

6. From the left side menu, navigate to **People Plans > List** and open the **List** tab to review the existing plans for the project.
7. Navigate to **People Plans > Assign Plans > List**.
8. Select the **edit icon in each row** containing the user "Juliette O'Hara".
9. In the *Plan Edit* popup window, change the *Task* selection to "<No Task>" for each plan, and press **Save**.
10. Check the **Assign** box in the top row of the *Assign Plans* screen and press **Save**.
11. Navigate to **People Assignments > List > List** to confirm that all People Assignments were created.

Expense Plans and Expense Budgets

Project Managers or Project Leads can plan and budget the expenses on projects that they manage. Expense values are entered using the "direct cost" and the system will use other project settings to calculate the total cost and revenue for the expenses. Both plans and budgets can be used in many Unanet reports and can be compared against the actual expenses charged on expense reports by users. However, neither plans nor budgets are related to the actual charges on an expense report. It is the Person Assignment and Project settings that allow a user to create an expense report. The expense plans and budgets simply provide a reporting mechanism for management of the projects.

Expense plans and budgets are associated with the project or task, not the individual users that will create the expense reports. As such, reporting on expense plans/budgets is limited to the Project Reports section.

Like the people plans and assignments, Unanet offers a "one-button push" feature to create expense budgets directly from the expense plans. Once the expense budget is created, the plans and budgets function as two separate tables in the system. Changes to budgets will not update plans and vice versa.

Demo 2.9 – Creating Expense Plans and Expense Budgets

Log in as Gus Lead (glead/welcome), who has the required Resource Planner role to view the Expense Plans and Expense Budgets screens in the project left side menu.

Demo Steps

1. Review the **Expense Plans > List > List** view for a project.
2. Review the **Expense Plans > Plan with Grid** for a project.
3. Review the Project Accounting reports recommended by Unanet to confirm the validity of the project expense plans.
4. Use the **Budget** button to create expense budgets.

Activity 2.10 – Creating Expense Plans and Expense Budgets Using the Grid

Log in as Gus Lead (glead/welcome) to add an Expense Plan to a project and then use it to create an Expense Budget.

Activity Steps

Part 1: Modify an Existing Expense Plan in the Grid

1. Navigate to **Contracts > Project > List**.
2. Using the filter options on the **Search** tab, select the project "TRILOBITE RSMGNT-BUDGETS-FROM-PLANS".
3. Open the **List** tab and select the **edit icon** for the project.

4. In the project menu, navigate to **Expense Plans > Plan with Grid**.
5. On the **Search** tab, select the criteria as indicated below:

PLAN FOR	
PLAN VIEW:	Project
PLANNING PERIODS:	Calendar Quarters 4 1/1/2022 *Period Type* *Number* *Start Date*

6. Press **Save Criteria,** rename the plan “TRILOBITE - Grid Plan – Expense Plan,” and press **Save**.
7. Select the **Plan** tab.
8. Note the existing planned expenses.

EXPENSE TYPE	DESCRIPTION	JAN-22	APR-22	JUL-22	OCT-22	TOTAL
☐ 1.						
☐ 2.						
☐ 3.						

9. Add a new Expense Type using the criteria indicated below:

EXPENSE TYPE	DESCRIPTION	JAN-23	APR-23	JUL-23	OCT-23	TOTAL
Supplies	Misc office supplies	250.00	250.00	250.00	250.00	1000.00

10. Press **Save.**
11. Select the **Summary** tab and select each of the “Summarize by” options to review the different output layouts. Return to the browser window containing the recommended Project Accounting reports and select *Refresh Report* to view the updated results.

Part 2: Create an Expense Budget from an Expense Plan

1. In the left side menu, navigate to the project **Profile**.
2. Note the setting(s) selected in the *Project Management Level* section.

Project Management Level:	☐ MANAGE AT TASK LEVEL ☐ Require Tasks for Time Reporting ☐ Require Tasks for Expense Reporting ☐ Require Tasks for Item Reporting

3. Navigate to **Expense Plans > Budget Plans**.
4. Select the **List** tab to view the plans available to budget.
5. **Check** the *Budget* button in the top row of the grid to select all plans.
6. Press **Save**.
7. Navigate to **Expense Budgets > List** and open the **List** tab to confirm that the expense budgets were created.

The Forecast – People Planner

Another way to plan People for Projects is via the Forecast menu. The People Planner option in the Forecast menu has been updated to a more intuitive interactive planner. This interactive planner view can be turned on by a system Administrator in **Admin > Properties**.

The same capabilities to create and modify plans are available at the Forecast planning level as there are at the Project planning level. The enhanced functionality includes the ability to drag and drop people between projects/tasks rather than select them from a dropdown list; the ability to add people to the plan that were not part of the original selection criteria; and allows the Administrator to save and share planning grid criteria.

Demo 2.11 – The Forecast - People Planner

Log in as Gus Lead (glead/welcome) to review the features of the Forecast – People Planner.

Demo Steps

1. Review the key features of the Forecast - People Planner.
2. Set up a planning grid and save the criteria for future use.
3. Create new plans using four different methods.

Activity 2.12 – Create People Plans Using the Forecast – People Planner

Remain logged in as Gus Lead (glead/welcome) and use the Forecast - People Planner to modify an existing People plan.

Activity Steps

Part 1: Create Saved Plan Criteria

1. Navigate to **Forecast > People Planner**.

2. Select **Planning Grid**.
3. Select *People Periodic Plan* and press **Continue.**
4. In the *Person Org* filter, **delete** the preselected “All Orgs” option.
5. **Select** “GS-SE Systems Engineering”, and press **Apply.**
6. From the resulting list of people, **select** the users listed below:

People:	Guster, Burton Lassiter, Carlton O’Hara, Juliette

7. Press **Continue.**
8. On the *Plan Timeframe* screen, specify the **Plan Timeframe** as indicated below:

22	Calendar ▾	Semi-Months ▾	from 2/1/2022

9. Press **Continue.**
10. Hover over the user “Burton Guster” in the grid, select the **three dots** that appear, and select **+ Add Project.**
11. In the *Project List Filters* column, **delete** the preselected “All Org Codes” option from the *Org Code* filter.
12. Select the Org Code “TRILOBITE – Trilobite Analysts” and press **Apply** at the bottom of the *Project List Filters* column.
13. From the list of filtered projects, **select** the project “TRILOBITE RSMGNT-FORECAST-PLANNING”.
14. **Scroll down** to the *Add Project(s) To* section, select “Add to all people on the grid”, and press **Apply.**
15. Press **Save Criteria**.
16. Enter the criteria name as “TRILOBITE-Forecast-Plan” and press **Save**.

Part 2: Plan Resources in the Grid

1. Hover over the project “TRILOBITE RSMGNT-FORECAST-PLANNING” under the user “Burton Guster”, select the **three dots**, and **select** “Edit Attributes for Entire Row”**.**
2. In the popup window that appears, modify the fields of the plan as indicated below:

PLAN LABOR *Hours*:	80
MISCELLANEOUS *Labor Category*:	Business Systems Analyst

3. Press **Save**.
4. **Double-click** the first semi-monthly increment cell for the user “Carlton Lassiter”.
5. In the popup window that appears, modify the fields of the plan as indicated below:

PLAN LABOR
Hours: 80

MISCELLANEOUS
Labor Category: Business Systems Analyst

6. Press **Save**.
7. **Toggle on** the *Shift Plans* switch at the bottom of the page.
8. **Check the box** for the project “TRILOBITE RSMGNT-FORECAST-PLANNING” under the name of the user “Carlton Lassiter”.
9. **Enter** “2” in the *Period(s)* field.
10. Press **Shift Right,** then press **Save Plan**.
11. **Toggle off** the *Shift Plans* switch.
12. In the row for the project “TRILOBITE RSMGNT-FORECAST-PLANNING”, **enter** “40” in the first semi-monthly increment cell for the user “Juliette O’Hara”.
13. Press **Save Plan**.

Check Your Understanding

Which of the following criteria help to define a valid plan? (Select all that apply.)

a) Planned all expected revenue
b) Planned an approved profit rate
c) Plan complies with the contract
d) Plans are within the contract start and end dates
e) Plan is technically executable

What is the likely result of not explicitly selecting the Labor Category in a People plan?

a) The system will derive the Labor Category and bill rate from the project configuration
b) The system will derive the Labor Category and bill rate from the Person Profile
c) No Labor Category or bill rate will be included in the plan

Which values are entered on the Expense Budget grid in Unanet?

a) Fully burdened costs
b) Direct costs
c) Negative costs

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

LESSON 3: EVALUATING PROJECT PERFORMANCE

Learning Objectives

Monitor progress, evaluate project performance, and reforecast resource allocation as necessary

- Configure system settings to ensure accurate revenue calculation for project accounting reports
- Generate reports to assess project status and modify future resource allocations as necessary

Introduction

In the project life cycle, the project monitoring and control phase happens in tandem with the execution phase. This phase involves actively reviewing the status of a project as it proceeds, evaluating potential obstacles, and implementing necessary changes. During this phase, organizations need to juggle several responsibilities, including keeping to the schedule, staying within budget, avoiding scope creep, and managing risk.

Reports for Reforecasting Resource Allocation

MyCo's Unanet system is configured to prevent users without the **Cost Rate Manager** role from generating any project accounting reports. However, the project team can analyze the performance of users' actuals based upon either plans or assignments and use that information to update future plans and assignments. To ensure that they can view report results for their projects, the project team members should modify their report criteria to set *Report On* to "All People I can See".

Tour 3.1 – Review Performance, Forecast, and Utilization Reports

Log in as Gus Lead (glead/welcome), who has the Project Lead role necessary to generate the following reports.

Tour Highlights

1. Generate the Project Periodic Performance report to view variances
2. Generate the Project Periodic Forecast report to view end state
3. Generate the Project Periodic Resource Allocation report to view utilization

Users with the **Project Lead**, **Project Manager**, or **Project Approver** roles may access the *Project Reports* section of the Reports dashboard. Users without these roles can access the versions of these reports available in the *People Reports* section.

Report Name	Description
PERIODIC REPORTS	
Performance	Provides a forecast of cost or revenue information in a Daily, Weekly, Monthly, Semi-Monthly, Quarterly or Yearly layout. Can summarize the output by a variety of attributes (e.g., by Project, Person, Labor Category, Expense Type, etc.), and the output can include Hours, Bill, Cost, Margin, % Margin or FTE information, with the capability to display results at various levels within your Task WBS. If actuals are included, the report includes financial document labor, expense, and item transactions.
Resource Allocation	Answers a variety of questions regarding how booked a user is, in terms of actual hours, assigned hours, or planned hours (optionally, requested leave can be included as booked hours) in a period by period layout with color coding to help flag individuals that fall into a particular booked percentage range. The version available in the People Reports section includes the ability to select a user's name in the report output to view additional details.
Forecast	Provides a forecast of cost or revenue information in a Daily, Weekly, Monthly, Semi-Monthly, Quarterly or Yearly layout. Can be run with Budget (aka Assignment) or Plan information and can also include Actuals through a particular date. Metrics can be viewed at the organization, project, or task level along with resources or labor category detailed level. If actuals are included, the report includes financial document labor, expense, and item transactions.

Reforecasting Projects for Resource Allocation

During the lifecycle, projects need to be reviewed for performance against key metrics that are relevant for the project. Many times, the project is limited to the contracted schedule, scope, and costs. In situations like this, if a team works more or fewer hours than originally planned, the project manager may choose to reforecast the remaining hours and move staff around to keep the project within the original boundaries of schedule, scope, and cost. Unanet includes several functions for reforecasting a project for hours and resource utilization.

Swapping

People Plans offer an option to “swap” the hours for one user to another user, provided that the user receiving the hours does not already have a People Plan with the same dates on the same project or task. Swapping resources can be performed on a single plan or in the grid where all hours in the grid can be swapped from one user to another.

The People Planner grid includes an option to search for users with specific skills, which is helpful if you do not know which users have the same skills as the person that currently has the hours in the plan. However, the fact that another user has the skills needed does not mean that they are available to perform the work. As such, the *Resource Allocation* report can be used to identify which user(s) have both the necessary skills and availability based on plans or assignments on other projects.

Overlapping assignments are not allowed. If the receiving user does not show as an option when trying to swap, then the receiving user already has an existing plan for that period.

Shift Left/Right

Once plans and assignments have been created in the grid, they can be moved to different time periods using the “Shift Left” or “Shift Right” buttons. This functionality can move the contents of a row of cells to the right or left a specified number of spaces but can only shift within the time periods displayed in the grid. When the populated cell moves to a new period, all values in the cell, including any associated overrides, will be moved. This feature may be helpful, for example, if a project is delayed for one or several months and the project team would like to shift existing entries without having to manually re-enter them.

The controls involved in this functionality include the leading check box on each row, the “Shift Left” and “Shift Right” buttons, and the “Number of periods to shift selected items left or right" entry field. Checking the box in the top row of the grid acts as a toggle to select or unselect all rows in the grid.

Revise Future Assignments

When reforecasting a project, the Project Manager may simply adjust hours and/or Labor Categories to ensure the project can be completed. It is important to only adjust the hours or Labor Categories for the future periods as actuals will always replace prior assignments, so there is little need to update past assignments. Reports offer the criteria option to show hours through a specific date and then remaining assignments. In the case that additional resources need to be assigned for future work on a project with existing assignments, Unanet recommends using the People Assignments > Assign with Grid feature to identify and select the available necessary resources and create their assignments.

Demo 3.2 – Review Project Reforecasting Methods

Explore the different methods available for modifying existing project assignments.

Demo Steps

1. Revise future project assignments by editing future periods.
2. Swap users on project assignments.
3. Shift project assignments to the right into future time periods.
4. Correct the appearance of grayed-out grids by ensuring the time increments selected in the search criteria match the original increments used to create the grid.

Activity 3.3 – Revise a Future People Assignment

Burton Guster will start working 20% of his time per period on all his billable projects for the next three months. Gus, as the Resource Assigner, needs to identify all the affected projects in that period and make the necessary adjustments to existing People Assignments. Log in as Gus Lead (glead/welcome).

Activity Steps

Part 1: Generate a Report to View Existing Assignments

1. Navigate to **Reports > Dashboard > Project Reports (Time & Expense Only) > Periodic Reports.**
2. Select *Forecast*.
3. Select the report criteria as indicated below:

Report On:	All Projects I can see
Project Code:	%rsmgnt
Person:	Guster, Burton
Project Type (Project's Default):	BILL-COMM, BILL-GOV
Reporting Period:	*CALENDAR:* ◉ Month 6/1/2022 *Start Date*
Number of Periods:	3
Schedule Type:	◉ Report on Budgets
Cell Options:	◉ Hours
Column Options:	☑ Show Projects

4. Press **Run Report**.
5. Note the names of the projects and the time periods this resource is assigned to work.

PROJECT	JUN-22	JUL-22	AUG-22

Part 2: Revise People Assignments Using the Forecast – People Assigner Grid

1. In a new browser tab, navigate to **Forecast > People Assigner**.
2. On the *Let's start assigning* screen, select **Assignment Grid**.
3. On the *Assignment Setup* screen, select "People Periodic Assignment".
4. Delete the "All Orgs" option in the *Person Org* field and select "GS-SE – Systems Engineering".
5. Scroll down and press **Apply**.
6. Select the user "Burton Guster" and press **Continue**.

7. On the *Timeframe* screen, specify the period of performance as “6 Calendar Semi-Months from 06/01/2022” and press **Continue.**
8. Select **Display Options** and change the *Budget By* setting to “Utilization”.
9. Hover over the project(s) that should be excluded based on the report results noted in Part 1.
10. Select the **three-dot-menu** then select “Remove Project”.
11. Hover over the header row of the grid until the **three-dot menu** appears and select “Edit Attributes for Entire Grid”.
12. In the popup window, enter “0.5” in the *Utilization* field.
13. Press **Save**.
14. At the bottom of the grid, press **Save Assignment**.

Activity 3.4 – Swap Users on a Project Assignment

Buzz McNab will be leaving the team to take on a special project next quarter. Mary Lightly will assume all of Buzz’s hours through the completion of his assigned projects. Gus Lead (glead/welcome) will need to identify the affected projects and swap Mary into all of Buzz’s future assignments.

Activity Steps

Part 1: Generate a Report to Identify Affected Assignments

1. Navigate to **Reports > Dashboard > Project Reports (Time & Expense Only) > Detail Reports.**
2. Select *Schedule Details*.
3. Select the report criteria as shown below:

Report On:	All Projects I can see
Person:	McNab, Buzz
Performance Period:	◉ *From:* 6/1/2022 *to* 12/31/2022
Schedule Type:	◉ Report on Assignments

4. Press **Run Report**.
5. Note the projects to which Buzz has been assigned and their Begin and End Dates.

PROJECT	BEGIN DATE	END DATE

Part 2: Use the Forecast – People Assigner Grid to Swap Users

1. In a new browser tab, navigate to **Forecast > People Assigner**.
2. On the *Let's start assigning* screen, select **Assignment Grid** and press **Continue**.
3. On the *Assignment Setup* screen, select "Project Periodic Assignment" and press **Continue**.
4. Delete the "All Owning Orgs" option in the *Owning Org* field and select "GS-SE – Systems Engineering".
5. Delete the "All Org Codes" option in the *Org Code* field and select "TRILOBITE- Trilobite Analysts".
6. Scroll down and press **Apply**.
7. Select the projects from Part 1 to which Buzz McNab is assigned, and press **Continue**.
8. On the *Assignment Timeframe* screen, select **Project Dates** and change the *Assigning Periods* to "Calendar Semi-Months".
9. Press **Continue**.
10. From the **Assignment Setup** screen, select **Display Options**, and confirm that the option "Project/Task Dates" is enabled and *Budget By* is set to "Hours".
11. In the assignment grid, hover over the row of the first project containing Buzz McNab until the **three-dot menu** appears, then select "Swap Person".
12. Use the *People List Filters* to select the user "Mary Lightly" and press **Apply**.
13. Repeat steps 11-12 swap the original resource for the named user on all projects in the grid.
14. At the bottom of the grid, press **Save Assignment**.

Activity 3.5 – Shifting Assignments to Future Periods

Woody Strode is taking FMLA leave, and his current project assignments will need to move forward by three periods. Gus Lead (glead/welcome) will need to identify Woody's assignments and shift them to the right in the People Assigner grid.

Activity Steps

Part 1: Generate a Report to Identify Assignments

1. Navigate to **Reports > Dashboard > Project Reports (Time & Expense Only) > Periodic Reports**.
2. Select *Performance*.

3. Select the report criteria as indicated below:

Report On:	All Projects I can see
Person:	Strode, Woody
Reporting Period:	*CALENDAR:* ⦿ Month *Start Date:* 6/1/2022
Number of Periods:	12
Row Options:	☑ *Show Plans*
Column Options:	☑ Show Projects

4. Press **Run Report**.

Part 2: Using the Project People Assigner Grid to Modify Assignments

1. In a new browser tab, navigate to **Contracts > Project > Dashboard**.
2. From the *Quick Links* menu on the left side of the screen, select *Managed Projects*.
3. Select the **edit icon** for the project identified in Part 1.
4. In the Project submenu, select **People Assignments > Assign with Grid**.
5. Select the grid criteria as indicated below:

ASSIGN FOR			
ASSIGN VIEW:	Project		
ASSIGNING PERIODS:	Calendar Semi-Months Period Type	24 Number	6/1/2022 Start Date
BUDGET IN:	⦿ Hours ○ Utilization		
PEOPLE TO PLAN			
PERSON:	Strode, Woody		
GRID CONTENTS			
DISPLAY OPTIONS:	☑ Show Project/Task Dates		

6. Select the **Assign** tab.
7. **Check the box** on the row containing Woody's assignments.
8. In the *Number of periods to shift selected items left or right* field, enter "3".
9. Press **Shift Right**.
10. Confirm that all of Woody's hours are assigned three periods in the future in the grid, then press **Save**.
11. Return to the browser tab containing the Project Periodic Performance report output and press **Refresh Report** to view the changes.

Check Your Understanding

Which of the following is a reason for grayed out cells in the People Assigner grid?

a) The grayed-out user is not currently active in the system
b) The grayed-out periods are outside the project's Begin and End Dates
c) The grayed-out periods do not match the period selected to create the assignment

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

LESSON 4: USING PLAN SETS

Learning Objectives

Create and manage the plan sets and versions available on a project

- Create one or more baseline plans for a project
- Use multiple plan sets to manage various planning scenarios

Introduction

Included in Unanet's Project Portfolio license, the Plan Set feature provides functionality to manage various planning scenarios and/or the ability to create baseline plans by creating one or many "sets" of plans, grouped together in what is referred to as a Plan Set. Both People plans and Expense plans may be associated with a particular version of a "plan set".

Creating and Managing Plan Sets

A project can have one to many plan sets, and one to many versions within each distinct plan set name. The *Manage Plan Sets* menu option is only visible once the feature has been enabled in **Properties > Forecasting > General**. Users with the Administrator or P&R Administrator role can define the set of Plan Set Names available for use in **Admin > Setup**, while users with the Project Manager role can manage the plan sets on their current projects. All Project-level planning-related screens will allow for the designation of the desired plan set to which a particular plan should belong (including all planning screens and the project planning grids). The ability to lock all plans in a plan set can be accomplished on an individual project via the **Plan Sets** option in the left side menu or across multiple projects via the **Forecast > Manage Plan Sets > Lock Plan Sets** screen. Several reports, including the *Plan Set Comparison* and *Plan Set Version Comparison*, are available to compare various plan sets and versions of those plan sets.

Demo 4.1 – Configuring Plan Sets

Review the system requirements to enable and manage plan sets, then discuss the process of assigning one or more plan sets to one or more projects.

Demo Steps

1. Explain the Properties related to using plan sets.
2. Discuss recommendations for creating Plan Set Names.
3. Compare the assignment of plan sets using the **Forecast > Manage Plan Sets** menu options with using the project-level **Plan Sets** left-side menu option.

4. Copy an existing Plan Set to a new Plan Set Name and modify the plans.
5. Generate plan set reports to compare plan sets within a single project or across multiple projects.

Functionality	Description
Properties > Forecasting > General	
Enable Multiple Plan Sets	When enabled, this property allows Project Managers to create multiple plan sets for a single project; each Plan Set may include multiple labor and expense plans
Allow Project Leads to Access Project Plan Sets	Enabling this property allows users to access the Plan Sets menu option on projects to which they are assigned as the Project Lead
Admin > Setup > Project	
Plan Set Names	Defines the master list of plan set names available to use in the system; may include a description; names may be set as Active or Inactive, or designated as the system default; Unanet recommends selecting names that are as descriptive as possible to ensure that Resource Planners and Project Managers can easily recognize them on reports

Report Name	Description
Reports > Project Reports (Time & Expense Only) > Periodic Reports	
Plan Set Comparison	Compares plan sets with the same name across multiple projects; output can be displayed as a grid in daily, weekly, monthly, or quarterly increments
Plan Set Version Comparison	Compares multiple versions of the same plan set for a single project; output can be displayed as a grid in daily, weekly, monthly, or quarterly increments

The **Forecast > People Planner** will create plans using the plan set that is active on a given project. Unanet recommends selecting the desired plan set using **Forecast > Manage Plan Sets > Set Active Plan Sets** rather than changing the plan set manually at the Project level. When a new Plan Set is assigned to a Project, it will not contain any plans; however, you can copy an existing Plan Set into the new destination Plan Set name at the Project level. While Plan Set Names are applied globally in Unanet, they operate only at the Project level, so a Plan Set used on one project has no effect on the same Plan Set being used on another project.

Check Your Understanding

At what level can existing Plan Sets be copied into a new Plan Set Name?

a) Forecast > People Planner
b) Forecast > Manage Plan Sets
c) Project > Plan Sets

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

APPENDIX A: CHECK YOUR UNDERSTANDING ANSWER KEY

Lesson 1: Selecting Resources

Which Unanet report can help to determine which users are available to plan on a project?

a) **Resource Allocation**
b) Schedule Details
c) Periodic Performance

Lesson 2: Planning Labor and Expenses

Which of the following criteria help to define a valid plan? (Select all that apply.)

a) **Planned all expected revenue**
b) **Planned an approved profit rate**
c) **Plan complies with the contract**
d) **Plans are within the contract start and end dates**
e) **Plan is technically executable**

What is the likely result of not explicitly selecting the Labor Category in a People plan?

a) The system will derive the Labor Category and bill rate from the project configuration
b) **The system will derive the Labor Category and bill rate from the Person Profile**
c) No Labor Category or bill rate will be included in the plan

Which values are entered on the Expense Budget grid in Unanet?

a) Fully burdened costs
b) **Direct costs**
c) Negative costs

Lesson 3: Managing Project Performance

Which of the following is a reason for grayed out cells in the People Assigner grid?

a) The grayed-out user is not currently active in the system
b) The grayed-out periods are outside the project's Begin and End Dates
c) The grayed-out periods do not match the period selected to create the assignment

Lesson 4: Using Plan Sets

At what level can existing Plan Sets can be copied into a new Plan Set Name?

a) Forecast > People Planner
b) Forecast > Manage Plan Sets
c) Project > Plan Sets

APPENDIX B: SUPPLEMENTAL INFORMATION

Reference Links

Unanet GovCon Glossary of Terms

GC | Sys Doc | People Skills

GC | Sys Doc | Admin Setup - Skill Levels

GC | Sys Doc | Admin Setup - Skill Types

GC | Sys Doc | Locations

GC | Sys Doc | Admin Setup – Labor Categories

Sys Doc | Benefits of TBD Planning Resource Licenses And How To Use Them

GC | FAQ | What Are UnaSource Only Or Planning Only Licenses?

GC | Sys Doc | Reports – User – Skills Profile

FAQ | Is there a "best practice" for setup of resource skills?

GC | Sys Doc | Reports – Resource – Skills Profile

Help: Reports – Resource – Skills Profile

GC | Sys Doc | Reports - People – Periodic - Resource Allocation

GC | Sys Doc | Resource Allocation Report

GC | Sys Doc | Reports - Resource Allocation Bar Chart

Help | Reports – Resource – Resource Allocation Bar Chart

GC | Sys Doc | Project People Plans

GC | Sys Doc | Project Expense Plans

GC | Sys Doc | Project Expense Budgets

GC | Sys Doc | Project People Plans – Plan With Grid

Sys Doc | Basic Expense Planning in the Grid

GC | Sys Doc | People Planner

GC | Sys Doc | Forecast – Expense Planner

GC | Sys Doc |Reports – Project Accounting – Periodic – Cost Summary & Status

GC | Sys Doc | Reports – Project Accounting – Project Revenue & Funding Summary

Sys Doc | People Planner – Convert Plans To Assignments

Sys Doc | Project Cost Reporting

Help: Reports – Project – Periodic - Performance

Help: Reports – Project – Periodic – Forecast

Help: Reports – People – Periodic – Resource Allocation

Help: Reports – Resource – Periodic – Resource Allocation

Sys Doc | How To Swap Resources On A Plan

Shifting Plans/Assignments

FAQ | Why Are The Cells Grayed Out In The Planning/Assignment Grid?

GC | Sys Doc | Admin Setup – Plan Set Names

Help - Manage Project Profile – Plan Sets

GC | Sys Doc | Forecast – Set Active Plan Sets

Sys Doc | Using Multiple Plan Sets

Sys Doc | Corporate Budgeting In Unanet – Steps For Locking Plan Sets

GC | Sys Doc | Forecast – Lock Plan Sets

NEXT STEPS

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