Unanet University

UNANET GOVCON:

USING ADHOC & ANALYTICS EXPRESSVIEW REPORTS

PARTICIPANT GUIDE

Last Revised November 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 expand your knowledge of Unanet's built-in reporting functionality by exploring custom reports. This includes modifying existing reports on the *Reports Dashboard*; creating and modifying reports using the *Adhoc* menu option; and manipulating data categories and fields to design your own reports using *Analytics ExpressView*.

Recommended roles: Administrator, GL Viewer

Learning Objectives

In this course, **Unanet GovCon: Using Adhoc & Analytics ExpressView Reports** participants will be able to:

- Navigate the layout and functionality of Adhoc and Analytics screens
- Identify the data available to include in Adhoc and Analytics ExpressView reports
- Create, modify, run, and share Adhoc and Analytics ExpressView reports
- Copy and modify existing reports to create custom reports

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 that the password is case-sensitive, but the username is not.

Unanet Role	Name	Unanet Username	Password
Project Viewer – read-only access to Project reports	Donna Planner	**dsplanner**	**welcome**
Administrator – can perform all functions; has access to all data and reports	Frank T. Controller	**fcontroller**	**welcome**

LESSON 1: ADHOC REPORTS

Learning Objectives

- Navigate the layout and functionality of Adhoc screens
- Identify the data available to include in Adhoc and Analytics ExpressView reports
- Create, modify, run, and share Adhoc and Analytics ExpressView reports
- Copy and modify existing reports to create custom reports

Introduction

The *Adhoc* report designer simplifies grouping, sorting, filtering, and aggregating data to allow users to quickly see data and make reports. Reports can be saved, shared, and exported as .csv files. Within *Adhoc* reporting, preconfigured "Views" have been created so that users can efficiently pull non-financial project and people data from various areas of the system. Access to Adhoc reporting is restricted to specific project and resource management roles in Unanet. The data included in Adhoc reports is similarly restricted by the *Organization Access* settings.

Users that have only a Timesheet User, Expense User, or UnaSource User role will not have access to the *Adhoc* menu option.

Creating Adhoc Reports

To create an adhoc report, navigate to the **Reports > Adhoc** menu option and select the *+Adhoc Report* icon. This will present you with a number of screens to specify the type of data to include, which columns should appear in the output, and any sort order, filtering, or summarizing you may need.

Next is the *Define a new Adhoc Report* screen, where you can select which type of data you will be reporting on: Person or Project. The options available in this dropdown list will change depending on the current user's role.

The *View* field automatically populates with a listing of specific data entities or relationships of entities that are available within the selected *Data Area*. This listing may be influenced by which Unanet modules are installed in your system. The combination of the *Data Area* and *View* will determine which fields will be available to you for a particular ad hoc report.

DATA AREA	VIEW		REQUIRED ROLE(S)
Person	Expenses Organization Person Plans Project Assignments	Rates Skills Task Assignments Time	Administrator P&R Administrator HR Administrator Manager
Project	Administrators Assignments – Organization Level Assignments – Project Level Assignments – Task Level Expense Budgets – Project Level Expense Budgets – Task Level Expense Plans Expenses	Labor Categories Notes Organization Pay Codes Plans Project Task Time	Administrator P&R Administrator Billing Manager Billing Viewer Project Approver Project Manager Project Lead Project Viewer

Once you have specified a *Data Area* and *View*, you will be presented with several additional tabs for customizing the content and appearance of the report. By default, the system will display the *Report Columns* tab first so you can select the data to include in the report.

FIELD NAME	DESCRIPTION	CRITERIA OPTIONS
**Report Columns*	Displays the data options available to display as columns in the report output, and allows the user to select the order in which the columns will appear from left to right **Requires input as it will determine what will be displayed on the report*	**Available Columns** – Lists the data options available based on the selected *Data Area* and *View* **Select report columns** – Moves selected items between *Available Columns* and *Report Columns* **Report Columns** – Displays the selected columns in the order in which they will be displayed on the report **Change report column order** – Allows the user to move selected options in the *Report Column* field to the left ↑ or to the right ↓ in the output **Break On** – Allows the user to subtotal data from selected *Report Columns*; items selected for a subtotal are marked with §
Sorting	Lists the Report Columns that can be sorted and allows the user to sort the columns as desired; if *Break On* has been applied, sort order will be	**Sortable Report Columns** – Lists the Report Columns that can be sorted by the user **Select sorted columns** - Moves selected items between *Sortable Report Columns* and *Sort Columns*

	enforced by the settings on the *Report Columns* tab	**Sort Columns** – Displays Sortable Report Columns as customized by the user **Change sort column order** – Allows the user to change the order of selected Sortable Report Columns
Criteria	Allows the user to restrict report data by combining report column(s) with an operator and one or more alphanumeric values	**View Column** – A dropdown list of the columns that have been selected to include in the report **Operator** – A dropdown list of mathematical functions to apply to the provided *Value* **Value** – Manually entered criteria that will be applied to the selected *View Column* using the selected *Operator*
Summary	Includes a summary of numerical data in the report output	**Report Column** – Displays selected Report Columns that contain numerical data as a Sum, Average, Minimum, or Maximum value
Custom Columns	Allows the user to create their own report column(s)	**+Custom Column** – Add a new custom column to the current adhoc report definition **Custom Column Builder** – User can create their own Criteria formula using addition, subtraction, multiplication, and division; output can be formatted as a number

Activity 1.1 – Create an Adhoc Report

MyCo's project team has been trained to enter project notes for any issues or possible risk situations. All team members assigned to a project are responsible for creating project notes, which are periodically reviewed by the Project Manager. Since there is no built-in Unanet report that aggregates Project Notes, MyCo will need to create an ad hoc report that can be exported and delivered to the Project Manager. Login as Donna Planner, Project Viewer (*dsplanner/welcome*).

Activity Steps

Part 1: Create a basic Adhoc report definition

1. Navigate to **Reports > Adhoc**.
2. Select the **+Adhoc Report** button.
3. Open the *DATA AREA* dropdown list and select "Project".
4. In the VIEW column, select "Notes".
5. Press the **Continue** button. The system will automatically move to the **Report Columns** tab.

6. In the *Available Columns* field, select the data items below. (Hint: Press the CTRL button to select multiple items.)

Available Columns
Project Code
Project Condition
Project Manager Name
Project Note Due Date
Project Note Status Name
Project Note Type Description
Project Title

7. Use the *Select report columns* arrow to move the selected items to the *Report Columns* field.
8. Select the **Sorting** tab.
9. In the *Sortable Report Columns*, select "Project Note Due Date" and use the *Select sorted columns* button to move it to the *Sort Columns* field.
10. Select the **Criteria** tab and enter the settings as shown below:

View Column	Operator	Value	
1. Project Note Type Name	contains	RISK,ISSUE	AND
2. Project Note Completed Date	Is null		AND

11. Press **Run** to execute the report and review the results.
12. Press the **Back to Criteria** button.
13. Press **Save** to save the report criteria.
14. In the *Save As* field, type "***PM ISSUE/RISK Report".
15. Press **Save.**

MyCo's HR director has asked for an ad hoc report for a quick audit of all employees to determine whether they have been properly classified. The requested report must include all users and display the following fields:

- Person Name
- Rate Classification
- Employee Type
- Business Week
- Time Period
- Cost Rate
- Cost Structure
- Cost Element
- Fully Burdened Wrap Rate

You will copy and modify an existing Adhoc report definition that uses a "Person – Rates" Data Area View to create the requested report. Login as Frank Controller, Administrator (*fcontroller/welcome*).

Part 2: Create a complex Adhoc report definition

1. Navigate to **Reports > Adhoc**.
2. Press the **blue run icon** beside the report labeled "Z_Person Configuration" and review the included data fields.
3. Press the **edit icon** beside the report titled "Z_Person Configuration".
4. Press the **Save** button.
5. In the popup window, update the report name to "HR Employee Audit Report" and add to the "People" Dashboard.
6. Select the **Custom Columns** tab.
7. Press the **+Custom Column** button.
8. Complete the fields of the *Custom Column Builder* as indicated below:

Name:		**Format As:**	Currency
Wrap Rate		**Aggregate As:**	None
Column	[Rate Cost Rate] * [Person Wrap Rate]		

9. Press the **Save** button.
10. Select the **Report Columns** tab.
11. Modify the items shown in the *Report Columns* field as indicated below (Hint: Press the CTRL button to select multiple items.):

Report Columns
Person Organization Code
Person Last Name
Person First Name
Person User Name
Person Employee Type Name
Rate Cost Element Code
Rate Cost Structure Name
Rate Classification
Wrap Rate

12. Press the **Save** button.
13. Press the **Run** button to assess whether the resulting report meets the HR Director's request.

Activity 1.2 – Modify an existing Adhoc report

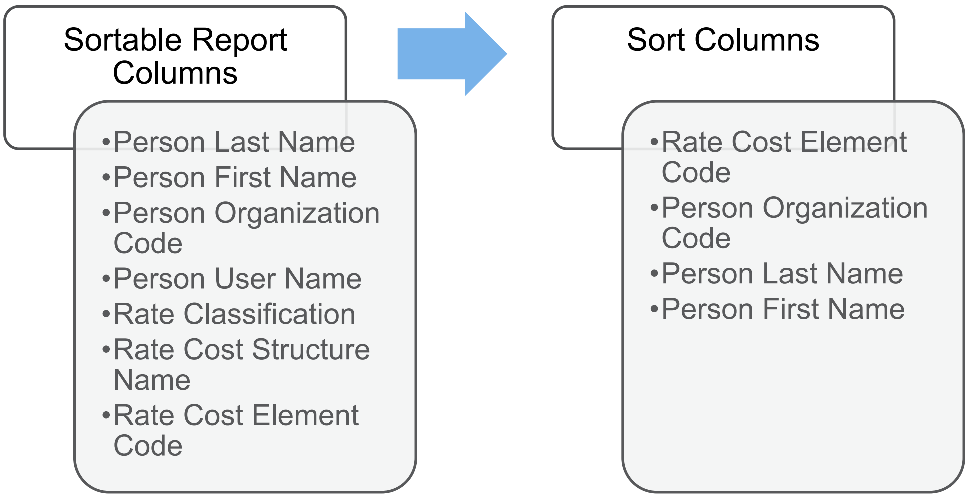
The report output as created in Activity 1.1 Part 2 is displaying multiple records for individual users. To improve the readability of the output, modify the report definition such that only one record is displayed for each user and all records are grouped and sorted by Person Organization and Last Name. Login as Frank Controller, the system Administrator (*fcontroller/welcome*).

Activity Steps

1. Navigate to **Reports > Adhoc**.
2. Select the **edit icon** beside the “HR Employee Audit Report”.
3. Select the **Criteria** tab and enter the settings as shown below:

View Column	Operator	Value	
1. Rate End Date	equals	EOT	AND

4. Press the **Run** button to analyze the report results.
5. Select the **Back to Criteria** button.
6. Select the **Sorting** tab.
7. In the *Sortable Report Columns* field, select each data item below and use the *Select sorted columns* arrow to move the selected items to the *Sort Columns* field in the order shown. (Hint: Press the CTRL button to select multiple items.)



8. Select the **Report Columns** tab.
9. In the *Report Columns* field, select “Rate Cost Element Code”
10. Press the **Break On** button. Note the § symbol that now appears beside the selected item.
11. Press the **Run** button to analyze the report results.
12. Select the **Back to Criteria** button.
13. Press the **Save** button.
14. In the *Save As* popup window, navigate to the *Add to My Dashboards* section and check the **Home** box.
15. Press the **Save** button.

Sharing Adhoc Reports

You can share a particular report definition with other users via the Export/Import capabilities. Once you have a report defined as you would like, you can click on the Export button which is available on any of the report definition edit tabs (e.g., *Report Columns, Sorting, Criteria, Summary*). This will prompt you to save a file (in XML format), which can then be shared with another user.

The receiving user can load a shared report into their list of adhoc reports by clicking on the *+Adhoc Report* icon (available on the *Reports* >> *Adhoc* screen), and then rather than selecting a *Data Area* and *View*, click on the Import button (and selecting the provided file).

Note that if the original author had permission to see data areas, views, or columns that the receiving user does not have permission to see, the import process will continue to load the report, dropping any of the columns in questions. For example, if the initial report creator possessed the *Cost Rate Manager* role and had included cost rate related fields, yet the receiving user did not have that role, any cost rate related fields would be dropped from the report definition when imported for that user.

The unique URL for a Saved Adhoc can also be sent to another user in the system for them to run. Administrators may also use Adhoc report definitions as the basis for Broadcast Reminders or Refreshable Web Queries.

Demo 1.3 – Sharing an Adhoc Report

Login as Frank T Controller, Administrator (*fcontroller*/*welcome*).

Demo Steps

- Share an Adhoc report definition using Export/Import function
- Share an Adhoc report definition using unique URL

Check Your Understanding

1. Which types of data can be accessed for Adhoc reporting? (Select all that apply.)
    a) Financials
    b) People
    c) Projects
    d) Time & Expense

2. Which tab(s) are used to define the data to include in an Adhoc report? (Select all that apply.)
    a) Report Columns
    b) Sorting
    c) Criteria
    d) Summary

Refer to APPENDIX A: CHECK YOUR UNDERSTANDING ANSWER KEY for answers to the *Check Your Understanding* questions

LESSON 2: ANALYTICS EXPRESSVIEW REPORTS

Learning Objectives

- Navigate the layout and functionality of Analytics screens
- Identify the data available to include in Analytics ExpressView reports
- Create, modify, run, and share Analytics ExpressView reports
- Copy and modify existing reports to create custom reports

Introduction

The Unanet Analytics screen provides users access to their data through custom reporting with adhoc style reports and provides business intelligence. Unanet provides some standard reports as well as sample report templates, such as reports for GL Budgets, that you can copy to your company or personal folder and customize. You can also have company specific reports, as well as your own personal reports. The Analytics screen provides access to dashboard capabilities and graphical views of data.

Analytics+ is available to Cloud customers only and includes *ExpressView*. *Analytics Studio* is available for purchase with *Advanced Report**, *Dashboard**, and *CrossTab Report** functionality. (*not covered in this class).

The *ExpressView* Designer is a data discovery and reporting tool that simplifies grouping, sorting, filtering, and aggregating data with a drag-and-drop interface. *ExpressView* allows you to quickly see data and make reports without concern for the minutiae of old-fashioned report building. A chart can be added with a single click, and *ExpressView* reports can be styled and saved as PDF, RTF, CSV, or Excel files.

Navigating the Analytics Reports Dashboard

Upon selecting the **Reports > Analytics** menu option, you will be presented with the **Getting Started** tab, which contains four root folders used to organize all Analytics reports. Selecting a report will display its description at the bottom of the page.

Sample Report Templates

- Contains read-only access to sample reports, available to all users
- Can be customized using the *Duplicate* function and saved to the **Company Reports** or **My Reports** folders

Standard Reports

- Contains advanced reports created by Unanet's Analytics team
- Includes interactive filters

Company Reports

- An instance-specific folder providing read-only access to all users within the instance
- Used to store custom reports created by the client
- Only the **Administrator** can create and delete reports

My Reports

- Reports created and modified by end users
- Visible only to the user who created them

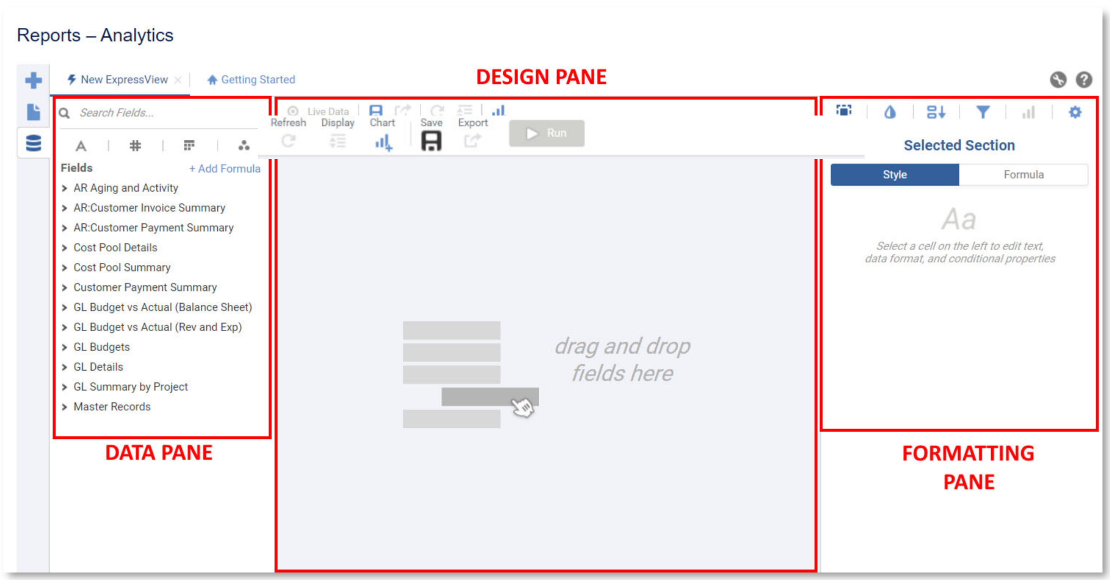
All Unanet roles have access to Analytics ExpressView, but the data object fields available to individual users will be limited based on their assigned roles, Organization Access, and license type. Users with the **Administrator** role have access to all data object fields. The **Analytics Designer** role, available with all Unanet licenses, allows a user to have Administrator-level access to Analytics while restricting data object access based on other roles assigned to the user. Along with the Administrator, users with the **P&R Administrator** and/or **Analytics Designer** roles can manage instance reports and scheduled reports, and have access to the Studio folders, reports, and functions (with Studio license).

Role	Description	Available Data Objects
SYSTEM		
Administrator	Can perform all functions and access all data	ADM: All FIN: All ORG: All PRJ: All PPL: All
*Analytics Designer** *requires the Analytics Studio license	Can create and manage *Analytics* reports; can manage *Analytics* folders; data visibility is restricted by other assigned roles and Organization Access	Dependent on the other roles and access granted to the user
PROJECT MANAGEMENT AND RESOURCE MANAGEMENT (P&R)		
P&R Administrator	Can perform any Project or Resource Management function; can access all Project and Resource Management reports and data	ADM: Account ADM: Account Org Access ADM: Fiscal Period Setup ADM: Indirect Rate Multiplier ADM: Master Expense Type ADM: Payment Term ADM: Posting Group and Account FIN: CI Summary & Attributes FIN: CI Application & Attributes

		FIN: CI Details with ITD ORG: All PRJ: All PPL: All
Project Viewer	Provides read-only access to Project reports	PRJ: Advanced Costing Project List PRJ: Advanced Costing Task List PRJ: JSR Task List PRJ: Labor Actuals by Month PRJ: Labor and Expense Details PRJ: Periodic JSR PRJ: Periodic Plan/ Budget/Actual PRJ: Project Invoice Setup PRJ: Project List PRJ: Project Notes PRJ: Project Transactions PRJ: Task List

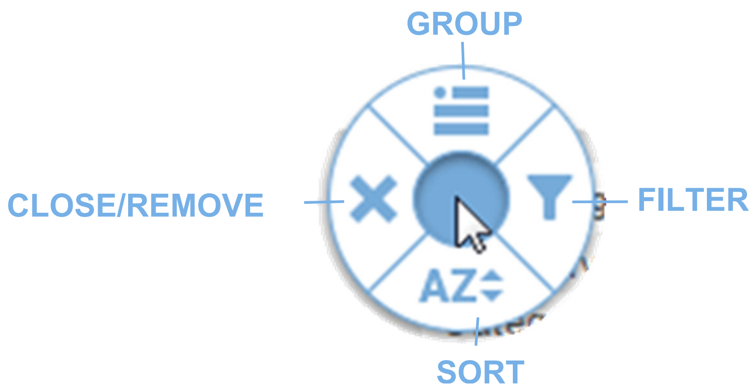
The Analytics User Interface

The user interface for Unanet Analytics is organized into three spaces, called panes. The first pane on the left is the *Data Pane*, which provides a search function, data type filtering, and a list of data categories that can be expanded to show the data fields that are used to populate reports. Hovering over a data field will display a brief description of the item. The center pane is the *Design Pane*, where selected data objects can be arranged to create the report layout. At the bottom of the *Data Pane* is a description for any selected report. On the right is the *Formatting Pane* which includes powerful tools to create visualizations, sort and filter data, and format cells and reports.



The *Duplicate* menu option is only available for the Studio package.

The **radial menu** displays options for each data column and group, which are accessed by clicking the circular icon beside the group or column header. Each radial menu has four options arranged in a circle around the center:



Tour 2.1 – Standard Reports

Login as Frank T. Controller, Administrator (*fcontroller*/*welcome*).

Tour Steps

- Review popular *Standard Reports*: Accrual to Cash Conversion, Floor Check Report, Statement of Cash Flows

Sample Report Templates

Sample Report Templates are read-only reports meant to be used as examples to assist in building your own reports. These reports are not designed to run directly from this folder; rather, they should be duplicated, modified, and saved as personal reports in the *My Reports* folder. Users with the **Administrator** role can choose to email *Sample Reports* in a variety of formats, including Excel, PDF, RTF, and CSV. Administrators can also schedule reports to be run at regularly specified times to meet the requirements of on-demand reporting.

Activity 2.2 – Copy and modify a Sample Report Template

MyCo's Accounting department has requested a report that will function as a check register, allowing them to view transactions as a single positive or negative net amount per line. Login as Frank Controller, the system Administrator (*fcontroller/welcome*) to use the *GL Details* sample report template to create a custom report.

Activity Steps

1. Navigate to **Reports > Analytics**.
2. Expand the folder **Sample Report Templates**.
3. Expand the folder **GL Details**.

4. Right-click on “GL Details – Standard” and select **Duplicate.**
5. In the *Duplicate Report* pop-up window, modify the criteria as indicated below:

Duplicate Report
Enter the report name
GL Details - Test

Select folder for the report
My Reports

6. Press the **Okay** button.
7. From the *Getting Started* tab, open the **My Reports** folder. (Note: If the saved report is not visible, refresh the page.)
8. Select “GL Details – Test” and press the **menu icon**.
9. Select **Edit.**
10. In the *Format Pane* on the right, select the **Filters icon**, and modify the criteria as indicated below:

Filters

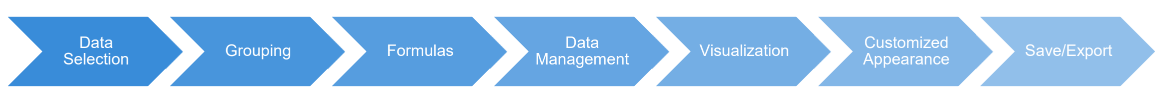
Standard	Top/Bottom

ADM: Fiscal Period Setup.Fiscal Year
Equal To
FY23

11. Close the *Format Pane* by selecting the **Filter icon**.
12. Navigate to the column *Doc Date*, open the **radial menu**, and select **Remove**.
13. Navigate to the top of the *Design Pane* and press the **Save** button.

Creating ExpressView Reports

ExpressView uses a drag & drop interface to simplify grouping, sorting, filtering, and aggregating data. Fields can be added to or removed from the *Design* pane at any time and will initially display placeholder values until the **Run** button is pressed. The general process for creating a new ExpressView report in your Unanet instance will contain the following steps:



Grouping

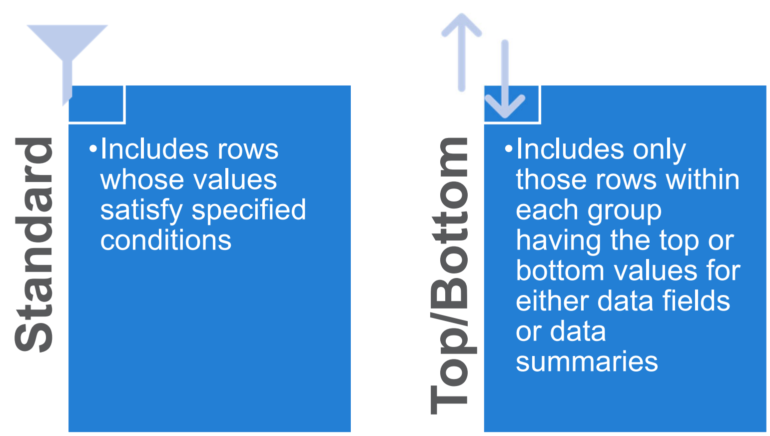
Groups collect a set of data rows, based on a common value, into a column called a group column. This allows you to identify rows with common factors. You can perform summary calculations on grouped data, such as counting all the rows in each group, or adding up the values for a data field in each group. You can also make charts to visualize the data in each group and compare groups to each other.

Formulas

Formulas can be used to create custom data columns in *ExpressView*. Formulas are calculated once per row, based on the other data values in that row. For each row calculation, a formula value is returned for that row, which populates a new column of data. You can use these columns just like any others: format the data, add to a visualization, or group based on formula columns. They are treated the same as data columns.

Manage Data

Within *ExpressView*, you may choose styling options, filter which rows should appear, and change the order of rows in their respective sections. Formatting allows you to specify a data type (e.g., *number*, *date*, *text*) for specific data fields, and choose how that data will be displayed. Sorting allows you to set the order in which data rows appear in each section. The order of fields on the *Sorts* page is their order of precedence, from highest to lowest. Their order is also indicated by a number on the right of the column headers: The lower the number, the higher the precedence. Filtering allows you to narrow the scope of your *ExpressView* report output by restricting the amount of data shown.



Visualization

Charts allow you to showcase your data in a visual format to quickly scan your data for patterns and trends. While selecting *Show Visualization* will generate a bar chart by default, you may select from alternate chart types, including Bar and Column, Pie, Line, or Area charts. When in *Run* mode, selecting a chart series filters the data columns to display details only for the selected series.

Customize Appearance

ExpressView offers greater flexibility in formatting reports to allow for total customization. You can make universal changes like selecting themes using the **Report Formatting and Style** icon or modify specific sections by right-clicking or using the **Selected Section** icon. Customization extends to setting background colors for data rows, customizing group headers and footers, alternating color patterns, and nested group colors.

Save/Export

To save an *ExpressView* report as a file, it can be exported as *PDF*, *RTF*, *CSV*, or *Excel*. Each format has its own benefits and limitations determined by user need.

	Pros	Cons
PDF	Closest to the look of ExpressView Best for printing and emailing	Large amounts of data may result in too many pages or an overly large file size
RTF	Retains basic look of ExpressView Can be modified in word processing software	Appearance may vary depending on software used to open the file Unsuitable for viewing large amounts of data
CSV	Best for processing large amounts of data	Retains only the data from ExpressView Does not retain the formatting from ExpressView
Excel	Retains the data, visualization, and some formatting of ExpressView Best for presenting large amounts of data in visually presentable form	

To customize the appearance of exported files, select the **Settings** icon and expand the *Export Settings* section to view and modify the available options.

Export Settings	Description
Page Options	Determines the size and orientation of PDF, RTF, and Excel reports as they appear onscreen and in print
General Options	Enables restriction of the export types allowed for the selected report Allows a default Export Type to be assigned to the selected report Allows a shortcut to be added to the Report Tree for the selected report

Other Options	Include/exclude report configuration information in the export file Assign color-coding to group headers Select the notification method for reports that return no data Determine whether to automatically "flatten" group columns in Excel or CSV files into data columns Retain Excel formatting or display data only

Activity 2.3 – Create a new ExpressView Report: Financial

MyCo's CFO has requested a report, preferably a chart, displaying current revenue by customer based on posted data for all billing types. Login as Frank T. Controller, Administrator (*fcontroller/welcome*) to build the requested report.

Activity Steps

Part 1: Create a new *ExpressView* report

1. Navigate **to Reports > Analytics**.
2. Press the **+Create New Report** button and select *ExpressView*.
3. In the *Fields* section of the Data Pane, expand the **GL Details** folder.
4. Expand the data category **FIN: GL DETAILS.**
5. Drag and drop the data field "Project Org Name" into the Design Pane as the **first column**.
6. Drag and drop the data field "Project Code" into the Design Pane as the **second column**.
7. In the Data Pane, press the **+Add Formula** link.
8. From the Data Pane, drag and drop the "Credit Amount" field into the *Formula* box.
9. At the end of the field text, **insert the cursor** and **type a minus sign**.
10. Return to the Data Pane and **double-click** the "Debit Amount" data field to insert it after the minus sign.
11. Select the **edit icon** in the header of the *Formula* window.
12. Change the *Formula* name to "Revenue", then press the **check mark** icon.
13. Open the **radial menu** for the column *Project Org Name* and select **Group**.
14. In the first *Project Org Name* group, select the footer for the *Project Code* column to open the **footer menu,** and choose "None"*.*
15. Open the **footer menu** in the *Revenue* column and select "Sum for Revenue".
16. Select any **group header**.
17. Navigate to the Format Pane and modify the *Style* tab of the *Selected Section* as indicated below:

FORMAT TYPE	
Number	
Decimal Places	2
☑ Use 1000 Separator	,
☑ Use Currency Symbol	$

18. Select any ***Revenue* column row**.
19. In the *Selected Section*, open the **Style tab** and modify the "Data Format" as indicated below:

FORMAT TYPE	
Number	
Decimal Places	2
☑ Use 1000 Separator	,
☑ Use Currency Symbol	$

20. Select any ***Revenue* column footer**.
21. In the *Selected Section*, open the **Style tab** and modify the "Data Format" as indicated below:

FORMAT TYPE	
Number	
Decimal Places	2
☑ Use 1000 Separator	,
☑ Use Currency Symbol	$

22. In the Format Pane, select the **Filters** icon, open the **Standard** tab, and modify the filter criteria as indicated below:

*Meet **all** of the following conditions:*

FIN: GL Details.Account Type is null
Equal To
⚙ Revenue

ADM: Fiscal Period Setup.Fiscal Year is null
Equal To
⚙ Current Fiscal Year

23. Press the **Run** button to review the results.

Part 2: Add visualization to the report

1. In the *Customer 1* group header, press the **collapse icon** to review the total in the *Revenue* column.
2. Press **Stop**.
3. At the top of the Design Pane, press the **Chart** button.
4. From the **Visualizations** tab in the Format Pane, open the **Type** tab and select "Pareto".
5. In the Design Pane, navigate to the bottom right corner of the chart and press the **Show Chart only** icon.
6. Press the **Run** button to review the results.

7. Press the **Stop** button, then press the **Save** button and enter the settings as indicated below:

Settings

Report Info
Name
Current Posted Revenue by Customer
Description
Displays current revenue, sorted by Customer, based on posted data for all billing types
Folder
MyCo Reports

8. Press the **Save Report Info** button.

Activity 2.4 – Create a new ExpressView Report: Project

MyCo's Contracts department wants to create a detailed report of labor and expense costs by project, including what has been invoiced to the customer as well as what is eligible for billing but has yet to be invoiced. The "Project Transactions" report shows most of the needed information, but without the status of the underlying timesheet or expense report documents. Login as Donna S. Planner, Project Viewer (*dsplanner/welcome*) to create the requested report.

Activity Steps

1. Navigate **to Reports > Analytics**.
2. Press the **+Create New Report** button and select *ExpressView*.
3. In the *Fields* section of the Data Pane, expand the **Project Labor and Expense** folder.
4. Expand the data category **PRJ: Labor and Expense Details.**
5. Drag and drop the **data fields** shown below into the Design Pane in the order listed from left to right: (Hint: Use the **filter icons** in the Data Pane to quickly find desired fields.)

Project Code	Task Name	Doc Type	Status	Customer Invoicing Number	Vendor Invoicing Number	Person Username	Transaction Date	Cost Element	Cost Amount	Billable Amount

6. Open the **radial menu** for the column *Project Code* and select **Group**.
7. Open the **radial menu** for the column *Task Name* and select **Group**.
8. Open the **footer menu** in the *Cost Amount* column and select "Sum for Cost Amount".
9. Open the **footer menu** in the *Billable Amount* column and select "Sum for Billable Amount".
10. Open the **radial menu** in the **column header** *Project Code* and select **Filter**.

11. Select the **gear icon** beside the *Project Code* dropdown and **check the box** beside *Contains*.
12. Open the *Project Code* **dropdown list** and select “20.CONTENT-PRODUCTION”.
13. In the Design Pane, open the **radial menu** of the *Customer Invoicing Number* column header and select “Filter”. <u>Do not select a Project Code.</u>
14. Press the **Run** button to review the results.
15. Press the **Save** button and configure the *Settings* tab as indicated below:

Name

Project Invoice Status – 20.CONTENT-PRODUCTION

Description

Detailed report of labor and expense costs by project, including what has been invoiced to the customer as well as what is eligible for billing but has yet to be invoiced

Folder

My Reports

16. Press the **Save Report Info** button.

Sharing ExpressView Reports

Each Unanet client has their own company folder that stores their customized reports and is visible only to users within that instance. These reports are read-only for all users except those with the role of **Administrator**, **P&R Administrator**, or **Analytics Designer**, each of which has the ability to add and delete reports. Any reports saved in the company folder are thereby shared with ALL users in your Unanet instance. To share Analytics reports saved to the *My Reports* folder, Unanet recommends downloading and emailing the report to selected end users for them to upload to their *My Reports* folder. As with all Unanet reports, the end user must have the appropriate roles and access in order to see data in a shared report.

Tour 2.5 – Sharing ExpressView Reports

Login as Frank T. Controller, Administrator (*fcontroller*/*welcome*).

Tour Steps

- Review methods for sharing saved Analytics ExpressView reports

Check Your Understanding

Which types of reports can you create with Analytics+? (Select all that apply.)

a) ExpressView
b) Advanced Reports
c) Dashboards

True or False: The Analytics Designer role grants the same access to Analytics functionality as the Administrator role.

a) True
b) False

Which of the following functions can be performed using the radial menu? (Select all that apply.)

a) Choose Data
b) Group
c) Filter
d) Format
e) Add Visualization
f) Sort

Refer to APPENDIX A: CHECK YOUR UNDERSTANDING ANSWER KEY for answers to the *Check Your Understanding* questions

APPENDIX A: CHECK YOUR UNDERSTANDING ANSWER KEY

Lesson 1: AdHoc Reports

Which types of data can be accessed for Adhoc reporting? (Select all that apply.)

a) Financials
b) People
c) Projects
d) Time & Expense

Which tab(s) are used to define the data to be included in an Adhoc report? (Select all that apply.)

a) Report Columns
b) Sorting
c) Criteria
d) Summary

Lesson 2: Analytics ExpressView Reports

Which types of reports can you create with Analytics+? (Select all that apply.)

a) ExpressView
b) Advanced Reports
c) Dashboards

True or False: The Analytics Designer role grants the same access to Analytics functionality as the Administrator role.

a) True
b) False

Which of the following functions can be performed using the radial menu? (Select all that apply.)

a) Choose Data
b) Group
c) Filter
d) Format
e) Add Visualization
f) Sort

APPENDIX B: SUPPLEMENTAL INFORMATION

Reference Links

Unanet GovCon Glossary of Terms

Adhoc Reports

GC | How To | Manage Ad Hoc Reports

GC | Sys Doc | Create Adhoc Reports

GC | Sys Doc | Reports - Ad Hoc Reports

Analytics

GC | Sys Doc | Reports - Analytics

GC | Sys Doc | Analytics – Available Data Categories

GC | Sys Doc | Data Objects For Unanet Analytics - PRJ

GC | Sys Doc | Data Objects For Unanet Analytics - FIN

GC | Sys Doc | Data Objects For Unanet Analytics - PPL

GC | Sys Doc | Data Objects For Unanet Analytics - ADM

GC | Sys Doc | Data Objects For Unanet Analytics - ORG

NEXT STEPS

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