Unanet University

UNANET GOVCON:
USING THE REPORTS DASHBOARD

PARTICIPANT GUIDE

Last Revised September 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 explore the standard reports available on the Reports dashboard, identify how data managed within the system appears on reports, and review features to create customized reports.

Recommended roles: Billing Viewer, Contract Viewer, Project Viewer, Viewer, AP Viewer, AR Viewer, GL Viewer

Learning Objectives

In this course, **Unanet GovCon: Using the Reports Dashboard** participants will:

- Identify the types of data available in each of the reporting sections
- Generate reports from the Reports Dashboard
- Select report criteria options based on desired data output
- Create a Saved report to display on a dashboard
- Execute a Saved Shared report and display it on a dashboard

Student Training Site

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

Roles & Access

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

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

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

Unanet Role	Name	Unanet login Username	Password
Billing Manager – manage posting options; posting; creating invoices; revenue recognition; can view Accounts Receivable Aging report **Bill Rate Manager** – grants additional permission to view bill rates and amounts **Project Viewer** – provides read-only access to Project reports	Faye Contracts	**fcontracts**	**welcome**
GL Admin – configure Cost Pools, Accounts, Budgets, posting groups, and financial information for Organizations; perform Labor Cost post, Expense Report Cost post, bank reconciliation, fiscal period close, and Fiscal Year close	Fran M CFO	**fcfo**	**welcome**
Manager – approve time and expenses; generate reports for users assigned to their approval groups	Genevieve UU User 00	**guser00**	**welcome**
Project Viewer – provides read-only access to Project reports	Donna Planner	**dsplanner**	**welcome**

LESSON 1: INTRODUCTION TO REPORTING

Learning Objectives

- Review the Reports menu options and the Reports Dashboard options
- Identify the user role(s) required to access specific reports
- Identify the types of data available in each of the reporting sections

Introduction

Real-time reporting is a hallmark feature of Unanet, which utilizes posted and unposted data as it is entered to provide timely insight into project viability, running business costs, and projected revenue. Unanet comes with a standard set of reports which includes the ability to dynamically specify who and/or what should be included in the result set. Many reports are available depending on a user's role or the license type installed in their system.

The Reports Menu

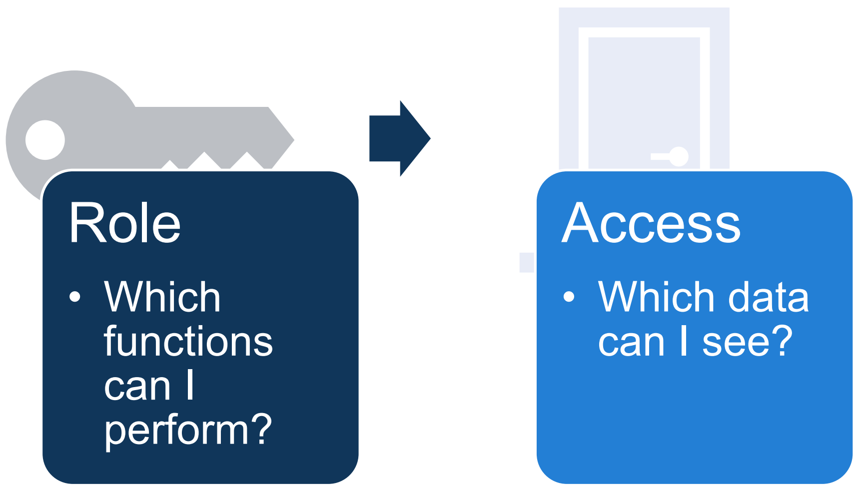
The options available in the Reports menu vary depending on the system's license type and the roles assigned to the user.

Reports	
Dashboard	Available to all Unanet users, this is the landing page for standard reports
Saved	Selecting this option will present the user with their defined criteria selections of standard reports and lists
Adhoc	Presents the user with a list of the report definitions they have created using the *Adhoc* report feature
Reference	Available to a limited number of administrative roles, this dashboard provides insight to data in a number of areas for referential purposes
Analytics	Provides users access to their data through custom reporting with adhoc style reports, called ExpressView, and other advanced report design features to provide business intelligence, access to dashboard capabilities, and graphical views of data

The **Analytics** menu option is only available to customers on a cloud subscription.

Roles and Reports

Unanet controls what a user can see and do through a combination of role and access settings. Roles define what a user has the potential to do and are set within a person's user profile. A user's access defines what a person can do under a specific role. It is very important to understand that, by default, merely giving someone a role does not grant them permission to see or do anything. The combination of roles and organization access (granted in the Person Profile) is what opens up what a user can see and do in Unanet. For example, the role of *Project Viewer* allows a user to run Project reports. However, this user must also be given access to specific projects before they can review Project reports.



Project Administrator roles, which allow a user to view Project reports, can be combined with the Cost Rate Manager role, which allows insight into individual salary data, to unlock visibility into Project Accounting reports. The following Project Administrator roles can be combined with the Cost Rate Manager role to grant access to Project Accounting reports with detailed cost information:

- *Project Viewer*
- *Project Manager*
- *Project Lead*
- *Project Approver*
- *Resource Requestor*

If, however, a Project Administrator needs to view cost information but should not have access to others' salary data, the system Administrator can enable one or more system properties to allow non-Cost Rate Managers to view cost reporting.

Reports by Role

The table below lists the various Viewer roles and the reports available to them. A full chart of roles and report access is included in Appendix B.

Role	Description	Available Reports
PROJECT MANAGEMENT AND RESOURCE MANAGEMENT (P&R)		
Billing Viewer	Read-only access to specific *Financial* and *Project Accounting* reports providing billing, revenue, invoice, and journal entry data	Accounts Receivable Aging Billing & Revenue Details Billing & Revenue Summary Fixed Price Details Invoice Details Invoice Status Journal Details Journal Summary Project Transactions
Contract Viewer	Read-only access to *Contract* data	Contract Brief
Cost Rate Manager	Grants access to view and edit cost rates and amounts at the individual level	Allows user to view cost rate data on Project Accounting reports
Project Viewer	Read-only access to *Project* reports available to Project Manager or Project Lead; Visibility can be limited by *Organization Access*	Project Accounting Reports Project Reports
Viewer	Read-only access to *People* and *User* reports	People Reports User Reports
FINANCIALS		
AP Viewer	Read-only access to *Accounts Payable* reports Can view *Accounts* and *Organizations*	Accounts Payable Activity Accounts Payable Aging Vendor Invoice Status
AR Viewer	Read-only access to *Accounts Receivable* reports Can view *Accounts* and *Organizations*	Accounts Receivable Activity Accounts Receivable Aging
GL Viewer	Read-only access to *General Ledger* reports	Balance Sheet Statement GL Details GL Summary (Trial Balance) Income Statement Income Statement - Trending

Roles

Any role that allows a user to see *Project* reports and in addition has the *Cost Rate Manager* role can see *Project Accounting* reports. The *Cost Rate Manager* role, however, allows insight into individual salary data. The Unanet *System Administrator* can set a property setting that allows summarized cost information to be displayed for those without the *Cost Rate Manager* role.

Tour 1.1 – Reports Available By Role

Access the Dashboard from the perspective of these different user types: *Time/Expense User, Manager, Project Viewer.*

Report Criteria Basics

Although the output of reports varies dramatically, the method for filtering and displaying data is consistent across all reports. Every report from the Reports Dashboard contains a combination of filter and display options which can produce an almost unlimited number of output options. Filter options, located at the top of the criteria screen, allow a user to constrain the records displayed in a report. The display options identify the fields that will appear in the output. When entering data into filter fields, the user can take advantage of a number of wildcard characters to further refine the returned list of entries.

,

COMMA

- Create comma-separated lists to specify multiple filter criteria
- Ex: "d,p" will include all items beginning with "d" or "p"

%

PERCENT SIGN

- Matches any number of characters
- Appended to but not displayed in all entered filter criteria
- Ex: "%net" will include "Unanet" and "Network"

_

UNDERSCORE

- Matches any single character
- Ex: "A_C" will return "ABC" and "ARC" but not "ABRC"
- Combine with PERCENT SIGN for complex matching
- Ex: "U_an%" will return "Unanet"

Common Selection Criteria

There are several fields that are available on multiple reports. These fields may have the same options across categories, or different options based on the type of data being assessed in the report. The table below lists some of the key criteria fields.

Field	Description	Available Options
REPORT ON	Allows the user to specify which users or projects to include in the report	**My Primary Projects** – Limits report output to projects to which the current user has been assigned as a primary Project Administrator **My Primary and Alternate Projects** – Limits report output to projects to which the current user is assigned as a primary or alternate Project Administrator or is defined as a global alternate to a user that has access to a particular project. **All Projects I can see** - Limits report output to the above two universes of projects in addition to any projects that belong to a Project Organization for which the current user has been granted Organization Access (unless the user has the Administrator role in which case no filtering will occur)
DATE RANGE	Specifies the time frame within which data will be included in the output.	**Custom Date Range** – Selects specific *Begin* and *End* dates by either typing in the dates directly or using the calendar icon **Named Date Range** – Allows the user to specify a date range using a list of preset options
ADJUSTMENTS	Determines which adjustments, if any, should be included in report output	**No Adjustments** - All adjustments will be excluded from the output **Adjustments using Posted Date within range** - Only those adjustments that have a Post Date within the specified date range will be included in the output **Adjustments using Worked Date within range** - All adjustments applied to the specified date range will be included in the output. **Include Pending Adjustments** - If selected, pending adjustments will be included in the results
INCLUDE EXPENSE REPORTS	Specifies which expense line items will be included in the output	**Using Line Item Date within Range** – Limits selected data to expenses that have a line item date within the report date range regardless of expense report completion date **Using Expense Report Completion Date within Range** - Includes all line items from any expense reports which were completed within the report range

		regardless of line item dates or the current status of the expense report **Using Posted Date within Range (Extracted Expense Reports only)** - Includes all expense line items for any expense report that has a post date within the report date range. (The post date can be set during an expense extract and is unrelated to any other expense report dates). **Include non-completed Expense Reports** - Enables the report to present expense data from expense reports that have yet to reach the COMPLETED status

Check Your Understanding

1. Which of the following options are included in the Reports menu? (Select all that apply.)

    a) Dashboard
    b) Saved
    c) Shared
    d) Adhoc
    e) Reference
    f) Resource
    g) Analytics

2. *True or False:* All users can see and access all reports.

    a) True
    b) False

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

LESSON 2: REPORTS DASHBOARD

Learning Objectives

- Identify the types of data available in each of the reporting sections
- Generate reports from the Reports Dashboard
- Select report criteria options based on desired data output

Introduction

The Reports Dashboard available with Project Portfolio Financials includes all seven reporting sections – *Financial Reports, Contract Reports, Project Accounting Reports, Project Reports, People Reports, Resource Reports*, and *User Reports*. All license types for Cloud customers include the *Contract Reports* section. Other license types may not include all of these sections. Within the Project Portfolio Financials license, the horizontal rows of the dashboard represent functionality categories, while the vertical columns represent the types of reports available, as shown below:

Detail Reports	Periodic Reports	Summary Reports	Status Reports
Return detailed information by performing limited aggregation or summation of system data	Display information in columns representing selected date frequencies such as weekly or monthly	Summarize data based on a selected date range	Provide a snapshot of the current state of specific system data, like time and expense actuals or customer or vendor invoices

The *Financial* reports section has its own unique vertical categories: *Accounts Payable, Accounts Receivable, General Ledger,* and *Purchasing*.

Selecting Reports

Identifying the question(s) you want answered can guide you to the report(s) you need to evaluate the health of your business and make informed decisions. Hovering over the *More Info* icon ⓘ next to each report name will present the user with a brief explanation of the information provided in the report's output or the question that can be answered by the report's output. Links to Knowledge Center documentation providing details for each report are located in Appendix B.

Financial Reports

The *Financial* reports section includes functional subsections representing: *Accounts Payable, Accounts Receivable, General Ledger,* and *Purchasing*. Each of these subsections include several reports and require specific roles to access.

ACCOUNTS PAYABLE

Required Role(s): Administrator, AP Poster, AP Viewer, VI User, Receiver/Approver

REPORT NAME	DESCRIPTION
Accounts Payable Aging	Displays a list of outstanding vendor invoices and unapplied vendor payments with outstanding balances categorized by document age
Accounts Payable Activity	Displays a list of invoices and vendor payments for a specified time period

Vendor Invoice Status	Shows all vendor invoices by approval status and allows the user to print multiple vendor invoices

ACCOUNTS RECEIVABLE

Required Role(s): Administrator, AR Viewer

REPORT NAME	DESCRIPTION
Accounts Receivable Aging	Lists outstanding customer invoices and unapplied customer payments with outstanding balances categorized by document age
Accounts Receivable Activity	Presents a list of invoices and customer payments for a specified time period

GENERAL LEDGER

Required Role(s): Administrator, GL Admin, GL Viewer

REPORT NAME	DESCRIPTION
GL Details	Displays details of transactions posted to the general ledger
GL Summary (Trial Balance)	Presents the general ledger trial balance
Balance Sheet Statement	Displays the balances of all Asset and Liability account types in Balance Sheet format as of a specified fiscal period
Bank Reconciliation	Presents reconciliation between a bank statement and the associated general ledger balance as of the fiscal period associated with the statement date
Income Statement	Displays all revenue and expense account type activity formatted as an Income Statement as of a specific fiscal period
Income Statement – Trending	Represents activity for all revenue and expense account types in an Income Statement format which can be used for forecasting and budget comparisons
Statement of Indirect Rates	Shows expenses incurred during a fiscal year, how they were allocated, and details of indirect rate calculations

PURCHASING

Required Role(s): Purchaser, Purchase Order Viewer, Purchase Requestor, Purchase Requisition, Viewer, PO Owner, Receiver/Approver

PURCHASING	DESCRIPTION
Purchase Requisition Status	Displays all purchase requisitions based on a specified status and allows printing of multiple purchase requisitions
Purchase Order Details	Shows remaining balances of specified purchase orders
Purchase Order Status	Presents all purchase orders with a specified status and allows printing of multiple purchase orders

Criteria Highlights

Financial reports pull data based on discrete financial functions (i.e., AP, AR), as well as GL data and Purchasing. Examples of criteria fields found on most *Financial* reports include:

FIELD NAME	DESCRIPTION	CRITERIA OPTIONS
Fiscal Period	Specifies the time period through which data will be included	**Specific Period**: Select from options configured in *Admin>Setup>Fiscal* Years formatted as "Fiscal Year Name + Accounting Period" **Named Period**: Built-in options based on standard reporting intervals like *Current Month* or *Previous Quarter*
Document	Enables the user to specify which Documents will be included in the resulting output	**Document Type:** Preconfigured list of all types of financial documents available in the system **Document #**: system-generated unique identifier created during the add process after the first save. Cannot be edited by the end user and cannot be changed after creation.

The *Document* field defaults to include all Document Numbers associated with the type of report being generated. The output of Financial reports can be filtered by selecting a Document Type, a Document Number, or both.

Activity 2.1 – Run an Income Statement Report

The *Income Statement* report presents the activity of all revenue and expense account types formatted as an Income Statement as of a specified fiscal period. Note that the *Current Year, Previous Year*, and *Actuals* amounts on this report can be expanded to display the GL Details that contributed to that amount.

Log in as MyCo's CFO Fran M CFO (*username*: fcfo/*password*: welcome) to generate a report showing the net income for last month.

Activity Steps

Part 1: Select report criteria

1. Navigate to **Reports > Dashboard > Financial**.
2. In the *General Ledger* column, select "Income Statement".
3. Select the report criteria as indicated below:

FISCAL PERIOD:	Fiscal – Previous Month
ROW DETAIL OPTIONS:	Roll-up Accounts to Level 1

4. Select **Run report**.

Part 2: Modify report criteria to increase level of detail

1. Select *Back to Criteria*.
2. Change the *ROW DETAIL OPTIONS* to List all Accounts individually.
3. Select **Run report**.

Part 3: Compare to last year

1. Select *Back to Criteria*.
2. In the field *COMPARISON COLUMN OPTIONS*, choose Compare Actuals to Previous Year Actuals.
3. Select **Run report.**

Contract Reports

The Contract Reports section currently includes just one Detail report: the *Contract Brief*. This report provides contract and subcontract information and is useful to DCAA representatives.

CONTRACT REPORTS

Required Role(s): Administrator, P&R Administrator, Contract Manager, Contract Viewer

DETAIL REPORTS	DESCRIPTION
Contract Brief	Displays Contract Profile details which may include Contract Provisions, associated Projects, Contract Modifications, Contract Clauses, and attachments

Criteria Highlights

Examples of criteria fields found on the *Contract Brief* report include:

FIELD NAME	DESCRIPTION	CRITERIA OPTIONS
Contract	Specifies which contracts will be included in the report output	**Contract Code** – Use a keyword or wildcard search to filter by elements of this unique identifier **Contract Title** - Use a keyword or wildcard search to filter by elements of the contract's title
Contract Type	Allows the user to filter by specific types of contracts	Available options are configured by the Administrator in *Admin > Setup*
Contract Status	Filters contracts by workflow stages to display only contracts of a selected status	Available options are configured by the Administrator in *Admin > Setup*

Contract Award Dates	Specifies the date range of contract awards to include in report output	**Custom Date Range** – Selects specific *Begin* and *End* dates by either typing in the dates directly or using the calendar icon **Named Date Range** – Allows the user to specify a date range using a list of preset options.
Customer	Narrows down which Customer Organizations will be included in output	**Org Code** – Use a keyword or wildcard search to filter Customers by their Org Code **Org Name** – Use a keyword or wildcard search to filter Customers by their Organization Name

Tour 2.2 – Contract Brief

This report can be accessed by Faye Contracts (*fcontracts*).

Additional Reports with Contracts as Search Criteria

The *Project Accounting* reports shown below can include Contract data as a search criteria and will display data for the related project(s) in the output.

PERIODIC REPORTS	DESCRIPTION
Cost Summary	Displays a forecasted job summary report based on plans/assignments and actuals for specified projects within a given date range
Cost Summary Bar & Line Chart	Displays a forecasted cost summary comparing plans/assignments to actuals for specified projects in a given date range; output displays a bar chart and may include a cumulative line
Cost Summary & Status	Generates a forecasted cost summary for specific projects within a given date range and includes the forecast at completion based on plans/assignments and actuals

SUMMARY REPORTS	DESCRIPTION
Billing & Revenue Summary	Displays the status of billable items and revenue on projects as a one-line summary
Project Summary by Cost Element	Presents all costs for specified project(s) as a one-line summary
Project Revenue & Funding Summary	Compares total costs with budgeted and funded project values
Project Cost Summary	Summarizes the true total costs and revenue for selected project(s)
Project Control Panel	Provides a consolidated view of project revenue with options to drill down into detailed views

Additionally, located in the *Standard Reports* folder of the Analytics dashboard is the "Contract & Project Gross Margin (P&L)" report. This report contains contract and project level revenue and expenses by GL account; it also summarizes posted revenue and subtracts expenses directly booked to the projects/contract.

Tour 2.3 – Project Revenue & Funding Summary

This report provides a one-line summarized view of revenue and funding by project (or optionally by task or task roll-up).

Project Accounting Reports

The *Project Accounting* category of the Reports Dashboard contains many reports related to billing, cost, revenue, and more. Project Accounting reports in Unanet enable users to report on the fully burdened costs, calculated in real-time, associated with their projects. Fixed Price Schedules, billable labor and expense calculations for Time & Materials projects, and fees for Cost Plus projects can also be included in reports, providing the ability to see revenue and true margin.

Only those projects having a defined Cost Structure will be included in Project Accounting reports. The following reports will not run unless the *Administrator* has created at least one Report Definition:

- Cost Summary
- Cost Summary & Status Report
- Cost Summary Bar & Line Chart
- Project Cost Summary

The table below includes examples of the more widely used reports:

PROJECT ACCOUNTING REPORTS

Required Role(s): Administrator, P&R Administrator, Project Manager, Project Lead, Project Approver, Project Viewer, Resource Requestor

DETAIL REPORTS	DESCRIPTION
ODC Details	Displays the contribution of expense actuals contribute to the total cost of selected projects
PERIODIC REPORTS	**DESCRIPTION**
Cost Summary & Status	Generates a forecasted job summary report for selected projects in a given date range with the ability to compare budgeted costs with forecast at completion
SUMMARY REPORTS	**DESCRIPTION**

Earned Value	Displays the Earned Value for selected projects within a defined Current period as well as the lifetime of each project
Project Revenue & Funding Summary	How do the total costs of my project(s) compare to their budgeted and funded values?
Project Cost Summary	What are the true total costs and revenue for my project(s)?

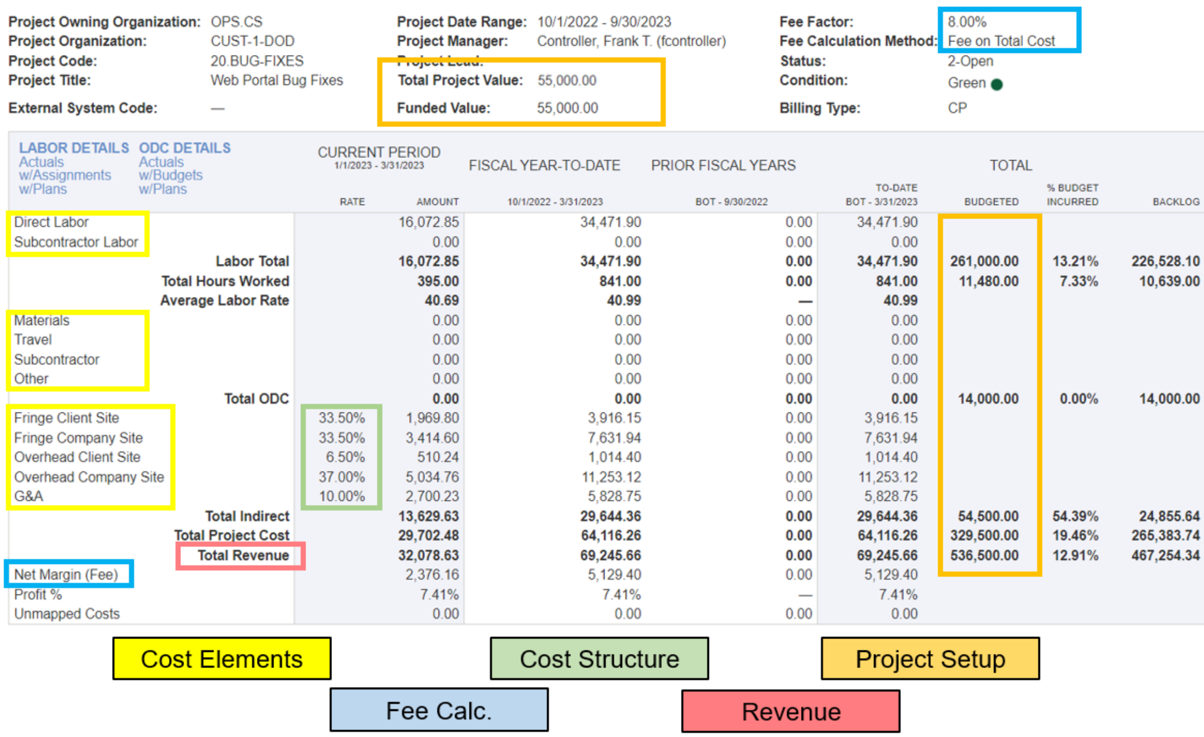
Criteria Highlights

Examples of criteria fields found in the *Project Accounting* reports section can include:

FIELD NAME	DESCRIPTION	CRITERIA OPTIONS
REPORT ON	Allows the user to specify which users or projects to include in the report	**My Primary Projects** – Limits report output to projects to which the current user has been assigned as a primary Project Administrator **My Primary and Alternate Projects** – Limits report output to projects to which the current user is assigned as a primary or alternate Project Administrator or is defined as a global alternate to a user that has access to a particular project. **All Projects I can see** - Limits report output to the above two universes of projects in addition to any projects that belong to a Project Organization for which the current user has been granted Organization Access (unless the user has the Administrator role, in which case no filtering will occur).
COST REPORT NAME	A required field used to indicate which cost report definition should be applied to the resulting output	Cost Report definitions must be configured by the Administrator in *Admin* > *Setup*
ROW OPTIONS	Enables the user to customize the report output based on specific elements	**Show Plans** – Displays People and Expense plans for selected projects using a selected Plan Set **Show Budgets** – Displays Expense Budgets for selected projects **Show Actuals** – Displays time and expense actuals for selected projects **Show Actuals Combined with Budgets or Plans** – Provides the option to display time and expense actuals alongside either the Expense Budgets or the People and Expense Plans for selected projects; will display an additional criteria window to configure calculations of remaining plan/budget

		Show Variance between selected options – Includes in the report output the variance between any of the options selected above; selecting this option displays an additional criteria window to select up to five (5) Variances to display

Project Cost Summary (example)



Project Owning Organization:	OPS.CS	**Project Date Range:** 10/1/2022 - 9/30/2023	**Fee Factor:**	8.00%
Project Organization:	CUST-1-DOD	**Project Manager:** Controller, Frank T. (fcontroller)	**Fee Calculation Method:**	Fee on Total Cost
Project Code:	20.BUG-FIXES	**Project Lead:**	**Status:**	2-Open
Project Title:	Web Portal Bug Fixes	**Total Project Value:** 55,000.00	**Condition:**	Green
External System Code:	—	**Funded Value:** 55,000.00	**Billing Type:**	CP

LABOR DETAILS: Actuals, w/Assignments, w/Plans; ODC DETAILS: Actuals, w/Budgets, w/Plans	CURRENT PERIOD 1/1/2023 - 3/31/2023		FISCAL YEAR-TO-DATE	PRIOR FISCAL YEARS	TOTAL			
	RATE	AMOUNT	10/1/2022 - 3/31/2023	BOT - 9/30/2022	TO-DATE BOT - 3/31/2023	BUDGETED	% BUDGET INCURRED	BACKLOG
Direct Labor		16,072.85	34,471.90	0.00	34,471.90			
Subcontractor Labor		0.00	0.00	0.00	0.00			
Labor Total		**16,072.85**	**34,471.90**	**0.00**	**34,471.90**	**261,000.00**	**13.21%**	**226,528.10**
Total Hours Worked		**395.00**	**841.00**	**0.00**	**841.00**	**11,480.00**	**7.33%**	**10,639.00**
Average Labor Rate		**40.69**	**40.99**	**—**	**40.99**			
Materials		0.00	0.00	0.00	0.00			
Travel		0.00	0.00	0.00	0.00			
Subcontractor		0.00	0.00	0.00	0.00			
Other		0.00	0.00	0.00	0.00			
Total ODC		**0.00**	**0.00**	**0.00**	**0.00**	**14,000.00**	**0.00%**	**14,000.00**
Fringe Client Site	33.50%	1,969.80	3,916.15	0.00	3,916.15			
Fringe Company Site	33.50%	3,414.60	7,631.94	0.00	7,631.94			
Overhead Client Site	6.50%	510.24	1,014.40	0.00	1,014.40			
Overhead Company Site	37.00%	5,034.76	11,253.12	0.00	11,253.12			
G&A	10.00%	2,700.23	5,828.75	0.00	5,828.75			
Total Indirect		**13,629.63**	**29,644.36**	**0.00**	**29,644.36**	**54,500.00**	**54.39%**	**24,855.64**
Total Project Cost		**29,702.48**	**64,116.26**	**0.00**	**64,116.26**	**329,500.00**	**19.46%**	**265,383.74**
Total Revenue		**32,078.63**	**69,245.66**	**0.00**	**69,245.66**	**536,500.00**	**12.91%**	**467,254.34**
Net Margin (Fee)		2,376.16	5,129.40	0.00	5,129.40			
Profit %		7.41%	7.41%	—	7.41%			
Unmapped Costs		0.00	0.00	0.00	0.00			

Tour 2.4 – Project Accounting Reports

We will tour the *Cost Summary & Status Report, Project Revenue & Funding Summary Report,* and *Project Cost Summary Report.*

Activity 2.5 – Run Project Accounting Report(s)

Faye UU Contracts is responsible for tracking burdened costs, profitability, and revenue on projects. Using the access provided by the *Project Viewer* and *Bill Rate Manager* roles, Faye wishes to run reports to provide insight on these metrics. Choose one or more options below based on what you use most often for daily tasks. Login as ***fcontracts*** (Faye UU Contracts – Project Viewer and Bill Rate Manager); Password: ***welcome***

Activity Steps

Option 1: Cost Summary & Status Report

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

REPORT ON:	All Projects I can see
PROJECT:	CUST-1-DOD 20.CONTENT-PRODUCTION CUST-1-DOD 20.HELP-DESK
BILLING TYPE:	FP TM
COST REPORT NAME:	UU_PM Profit (Gross)
REPORTING PERIOD:	*CALENDAR:* ⦿ Month *Start Date:* Calendar – Current Year
NUMBER OF PERIODS:	12
ROW OPTIONS:	☑ Show Plans ☑ Show Actuals Combined with ⦿ Budgets Today *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**.

Option 2: Project Revenue & Funding Summary Report

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

REPORT ON:	All Projects I can see
PROJECT: *ORG. CODE*	CUST-1
BILLING TYPE:	CP TM
DATE RANGE:	BOT *to* EOT
FORECAST OPTIONS:	Include Actuals and Assignments *Use Actuals Through Date* Calendar – Current Month *Calculate remaining plan/budget based on:* ⦿ Remaining hours/expenses per work day
REPORTING OPTIONS:	⦿ Calculate from Project Budgets/Funded Value
	Start Date: Calendar – Current Year
NUMBER OF PERIODS:	12
INCLUDE EXPENSE REPORTS:	⦿ Using Line Item Date within range ☑ Include non-completed Expense Reports

4. Press **Run Report**.

Option 3: Project Cost Summary (JSR) Report

1. Navigate to **Reports > Dashboard > Project Accounting Reports**.
2. In the *Summary Reports* column, select "Project Cost Summary (JSR)".
3. Select the report criteria as indicated below:

REPORT ON:	All Projects I can see
PROJECT: *ORG. CODE* *PROJECT CODE*	 CUST-1 20.%
BILLING TYPE:	CP TM
COST REPORT NAME:	Default PSR
DATE RANGE:	BOT *to* EOT
INCLUDE EXPENSE REPORTS:	◉ Using Line Item Date within range ☑ Include non-completed Expense Reports

4. Press **Run Report**.

Project Reports (Time & Expense Only)

Project reports provide data based on unburdened labor and expenses grouped by project. The table below lists some of the more widely used reports:

DETAIL REPORTS

Required Role(s): Administrator, P&R Administrator, Project Manager, Project Lead, Project Approver, Project Viewer, Resource Requestor

REPORT NAME	DESCRIPTION
Expense Details	*Displays the expenses charged to a project within a selected date range*
Organization Activity	*Identify the project work being performed for a given Organization or Customer*
Schedule Details	*Lists the resources planned/assigned to work on selected Project(s)*

PERIODIC REPORTS

Required Role(s): Administrator, P&R Administrator, Project Manager, Project Lead, Project Approver, Project Viewer, Resource Requestor

REPORT NAME	DESCRIPTION
Performance	*Presents a comparison of plans and/or assignments to actuals for selected projects in weekly, monthly, or quarterly increments*

SUMMARY REPORTS

Required Role(s): Administrator, P&R Administrator, Project Manager, Project Viewer, Project Lead, Project Approver, Customer, Resource Requestor

REPORT NAME	DESCRIPTION
Actuals Summary	*Summarizes time data, expense data, or both organized by a variety of attributes; may include Bill or Cost Rate information*

STATUS REPORTS

Required Role(s): Administrator, P&R Administrator, Project Manager, Project Viewer, Project Lead, Project Approver, Resource Requestor

PURCHASING	DESCRIPTION
Project Status	*Displays the current status of selected projects as a Project-level summary or a detailed breakdown including Tasks, Project Manager, Project Notes, etc.*

Criteria Highlights

The table below includes descriptions of several key criteria fields available on Project Accounting reports.

FIELD NAME	DESCRIPTION	CRITERIA OPTIONS
REPORT ON	Allows the user to specify which users or projects to include in the report	**My Primary Projects** – Limits report output to projects to which the current user has been assigned as a primary Project Administrator **My Primary and Alternate Projects** – Limits report output to projects to which the current user is assigned as a primary or alternate Project Administrator or is defined as a global alternate to a user that has access to a particular project. **All Projects I can see -** Limits report output to the above two universes of projects in addition to any projects that belong to a Project Organization for which the current user has been granted Organization Access (unless the user has the Administrator role, in which case no filtering will occur).
COLUMN OPTIONS	Enables the user to select specific project attributes that will appear in the resulting output	**Show Projects:** Includes details for each selected Project **Show Project Titles:** Displays the Project Title after the Project Code **Show Project Account Number:** Includes Account Numbers associated with each selected Project **Show Project Types**: Includes details by Project Type and may include an additional level of subtotaling **Show Pay Codes**: Includes details for pay codes associated with each selected Project **Show Labor Categories**: Includes details for labor categories associated with each selected Project **Show People Organizations**: Includes details of each Person organization assigned to a selected Project **Show People**: Includes details for each Person assigned to a selected Project.

		Show Time Charges: Displays additional columns to reflect a monetary amount (hours*rate) **Show Rates:** Displays a column containing rate information for each output row. **Show Expense Types**: Includes a column displaying the Expense Type associated with each time entry and expense charge on their own rows; only available if "Include Expenses" is selected **Show Tasks**: Includes details for each Task of selected Project(s)

Tour 2.6 – Project Reports

Activity 2.7 – Run Project Performance and Status Reports

MyCo project managers (company title, not Unanet role) need to assess their performance across a subset of projects by comparing planned labor and expenses to assigned hours and budgeted expenses as well as reviewing actuals entered by Labor Category. They also want to see the period of performance, funded value, and percentage complete. Login as Donna Planner (username: ***dsplanner*** password: ***welcome***).

Activity Steps

Part 1: Project Periodic Performance Report

1. Navigate to **Reports > Dashboard > Project Reports (Time & Expense Only)**.
2. In the *Periodic Reports* column, select "Performance".
3. Select the report criteria as indicated below:

REPORT ON:	All Projects I can see
PROJECT: *ORG. CODE* *PROJECT CODE*	CUST-1 20.%
REPORTING PERIOD:	*CALENDAR:* ⦿ Month *Start Date:* Calendar – Current Year
CELL OPTIONS:	⦿ Hours
ROW OPTIONS:	☑ Show Plans ☑ Show Budgets ☑ Show Actuals
COLUMN OPTIONS:	☑ Show Owning Organizations ☑ Show Project Organizations ☑ Show Projects ☑ Show Labor Categories

4. Press **Run Report**.

Part 2: Project Status Report

1. Navigate to **Reports > Dashboard > Project Reports (Time & Expense Only)**.
2. In the *Status Reports* column, select "Project Status".
3. Select the report criteria as indicated below:

REPORT ON:	All Projects I can see
PROJECT: ORG. CODE *PROJECT CODE*	CUST-1 20.%
INCLUDE ACTUALS THROUGH:	Today
REPORTING OPTIONS:	⦿ Calculate Project Metrics from Project Budgets ☑ Suppress Inactive Items ☑ Suppress Completed Items ☑ Show Project Managers
ADJUSTMENTS:	⦿ Adjustments using Worked Date within range ☑ Include Pending Adjustments
INCLUDE EXPENSE REPORTS:	⦿ Using Line Item Date within range ☑ Include non-completed Expense Reports

4. Press **Run Report**.

People Reports (Time & Expense Only)

People reports provide data based on unburdened labor and expenses grouped by Person Organization.

Here are examples of the more widely used reports:

People Reports

DETAIL REPORTS	DESCRIPTION
Accrual Details	How much time off have my people accrued?
Schedule Details	What projects are my people planned/assigned to work on?

PERIODIC REPORTS	DESCRIPTION
Forecast	What is the forecasted value of the work performed by my people at the end of a given period?
Resource Allocation	Are my people adequately planned/assigned?

SUMMARY REPORTS	DESCRIPTION
Accrual Summary	How many hours of unused accrued time off do my people have?
Performance	Do my people work to capacity?

STATUS REPORTS	DESCRIPTION
Expense Report Status	Which expense reports or expense requests have not been completed yet?
Timesheet Status	Which timesheets have not been submitted or approved for a given time period?

Roles

The following non-admin roles have access to the People reports:

- *Manager*
- *Viewer*

Criteria Highlights

Examples of criteria fields found in the People reports section can include:

Report on - The Report on selection criteria for this report allows you to specify whether the report output should include*:*

- *My Primary Approvees* - The report output will be limited to those users that are defined as submitters to an approval group for which the current user is defined as a primary manager approver.
- *My Primary and Alternate Approvees* - The report output will be limited to those users listed above plus those users defined as submitters to approval groups for which the current manager is defined as a manager alternate.
- *All people I can see* - The report output will be limited to the above two universes of submitters in addition to any users that belong to a Person Organization for which the current user has been granted Organization Access visibility *(unless the user has the Administrator role in which case no filtering will occur).*

Tour 2.8 – People Reports

Activity 2.9 – Run People Reports

Log in as Genevieve User (guser00/welcome) and choose two of the options shown below.

Activity Steps

Option 1: Accrual Details Report

1. Navigate to **Reports > Dashboard > People Reports (Time & Expense Only)**.
2. In the *Detail Reports* column, select “Accrual Details”.
3. Select the report criteria as indicated below:

REPORT ON:	All People I can see
PERSON: *ORG. CODE*	GS-SE
DATE RANGE: *(DETAILS POSTED WITHIN)*	Calendar – Current Year
REPORTING OPTIONS:	☑ Include Projected Accruals ☑ Include Pending Adjustments

4. Press **Run Report**.

Option 2: People Periodic Resource Allocation Report

1. Navigate to **Reports > Dashboard > People Reports (Time & Expense Only)**.
2. In the *Periodic Reports* column, select "Resource Allocation".
3. Select the report criteria as indicated below:

REPORT ON:	All People I can see
PERSON: *ORG. CODE*	GS-SE
REPORTING OPTIONS:	Include Actuals and Assignments *Use Actuals Through Date* Calendar – Current Year *Calculate remaining plan/budget based on:* ⦿ Remaining hours/expenses per work day
BOOKED % COLOR:	For % from 0 to 50 use ● Red For % from 51 to 81 use ● Green For % from 82 to 999 use ● Yellow

4. Press **Run Report**.

Option 3: People Expense Report Status Report

1. Open **Reports > Dashboard > People Reports (Time & Expense Only)**.
2. In the *Status Reports* column, select "Expense Report Status".
3. Select the report criteria as indicated below:

REPORT ON:	All People I can see
INCLUDE EXPENSE REPORTS:	⦿ Using Current Expense Report Status Date within range
EXPENSE REPORT:	☑ INCLUDE EXPENSE REPORTS ☑ INUSE ☑ SUBMITTED
DATE RANGE:	Calendar – Current Year

4. Press **Run Report.**

Option 4: People Timesheet Status and Timesheet Status Pie Chart

1. Open **Reports > Dashboard > People Reports (Time & Expense Only)**.
2. In the *Status Reports* column, select "Timesheet Status".
3. Select the report criteria as indicated below:

REPORT ON:	All People I can see
TIME PERIOD:	⦿ Specific Time Period Semi-Monthly (Most Recent Period)
REPORTING OPTIONS:	⦿ Detail View ☑ Cell Details ☑ Approval History ☑ Include page breaks in printed output

4. Press **Run Report**.
5. Review the report output.
6. Navigate to **Reports Dashboard > People Reports (Time & Expense Only)**.
7. In the *Status Reports* column, select "Timesheet Status Pie Chart".
8. Select the report criteria as indicated below:

REPORT ON:	All People I can see
TIME PERIOD:	⦿ Specific Time Period

	Semi-Monthly (Most Recent Period)
CHART OPTIONS:	☑ Show Title ☑ Show Legend

9. Press **Run Report**.
10. Review the report output then select **Back to Criteria**.
11. Press **Save Criteria**.
12. In the pop-up window, select the following criteria:

Save As:	Timesheet Status Chart - Previous
Add to My Dashboards	*CHARTS* ☑ People

13. Press **Save**.
14. Navigate to the **People** top menu and right-click on **Dashboard** to open the People Dashboard in a new tab.
15. View the report details by selecting any section of the saved chart.

Resource Reports

This section includes *Detail* and *Periodic* reports and charts related to schedule, skill profile, headcount, leave request, resource allocation, and resource request.

These reports allow users that do not have other required roles (e.g., Manager) to run reports from the *People* reports section.

Roles

The following roles have access to Resource Reports:

- *Administrator*
- *P&R Administrator*
- *Resource Planner*
- *Resource Assigner*

Tour 2.10 – Skill Profile Report and Resource Allocation Report

The *Skill Profile* report provides a listing of all skills (and proficiency levels) associated with individual users. The *Resource Allocation* report shows the allocation of employees across projects in the standard grid format.

User Reports

These reports allow end users to run reports providing data for their individual information with regards to time, expenses, assignments, skills, and individual performance. They also can obtain the status of their timesheets, expense reports, and leave requests.

Roles

The following roles have access to applicable User Reports:

- *Timesheet User*
- *Expense User*

Tour 2.11 – User Reports

Reports for *Accrual Details Report, Leave Request Report, Expense Report Status Report, Timesheet Status Report*

Check Your Understanding

1. Which categories appear on the Reports Dashboard? (Select all that apply.)

    a) Financial
    b) Purchasing
    c) Contract
    d) Accounting
    e) Project Accounting
    f) People
    g) Resource
    h) User

2. Within which categories can the Cost Summary report be found?
    a) Financial - Periodic
    b) Financial - Summary
    c) Project Accounting Periodic
    d) Project Accounting Summary

3. *True or False*: Any role that enables a user to view *Project* reports combined with the *Cost Rate Manager* role will allow the user to view *Project Accounting* reports.
    a) True
    b) False

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

LESSON 3: SAVED REPORTS

Learning Objectives

- Create a Saved report to display on a dashboard
- Execute a Saved Shared report and display it on a dashboard

Introduction

A time-saving feature of Unanet reports is the ability to save the selection criteria of your most frequently used reports. All users can save reports and lists for their own individual use. Users with the *Administrator* role additionally may share saved report criteria with any user(s) having the necessary role(s) and access to that report and the selected data. Once you save a report or create an adhoc report, you can determine which of them will appear in the *My Reports* list on the left side of each dashboard so that you can quickly run the report without having to navigate to another screen or enter selection criteria.

Saved Reports

Once a report has been generated and the output has been verified, selecting the *Save Criteria* link located at the top and bottom of each report criteria screen will display a popup window to allow the user to customize the report name. In addition, the *Add to My Dashboards* section can be expanded to view and select the dashboards where the saved report should be made available.

Charts cannot be saved to the **Reports** dashboard.

Note that the *Add to My Dashboards* section will not reflect any dashboards to which an item may already be displayed, and this control is only used to add the item (i.e., it will not remove the item from those dashboards not checked). Removing an item from a dashboard can be accomplished using the gear icon beside the screen title or via the *Preferences* > *Dashboard* screens.

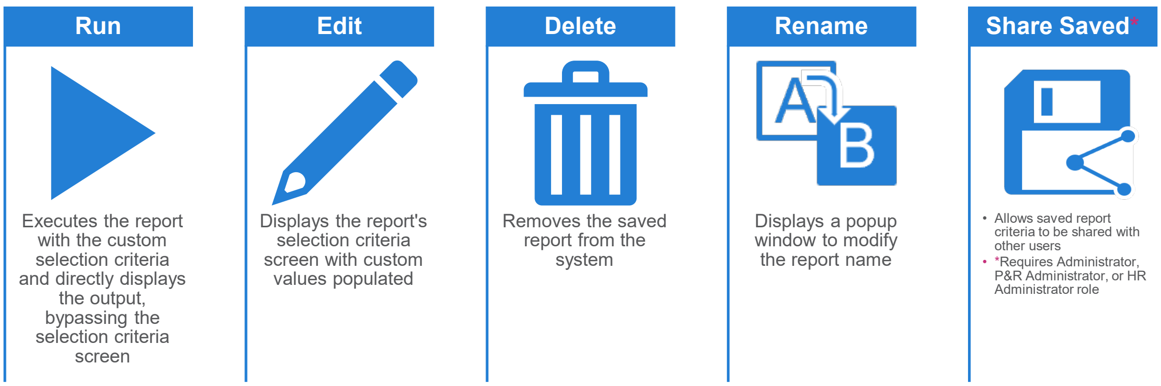
Once items have been saved, they are then available in the dropdown list of saved reports/charts/lists located at the top of each selection criteria screen. When a Saved Report/Chart/List is selected from the dropdown list, the screen is refreshed with all fields populated as they were originally saved.

Tour 3.1 – Utilizing Saved Reports and Lists

My Reports

Saved built-in and adhoc reports will appear in the *My Reports* section of the dashboard to which it was added. The reports will be listed as links in a left-hand column to enable you to generate the exact output you need in one step.

Selecting the *Saved Reports* menu option from the **Reports** menu displays all saved reports and lists with the following options for managing them:



My Lists

Similar to the *My Reports* dashboard section, users can define saved selection criteria to create various lists available via a single click. Saved lists may include people, projects, and even Project Notes selection criteria. Users may select which dashboard a saved list will appear on during the save process and confirm where links to lists are displayed in **Reports > Saved > My Lists**.

Shared Reports

Administrators, P&R Administrators, and HR Administrators have the ability to share their saved reports with other users, which makes them available for each user to include on their own dashboards. For example, an Administrator might configure a particular report for all of their Project Managers such that they will all run using a common set of selection criteria to produce comparable results.

Customizing the Dashboard

In the *Saved Reports* dashboard, clicking the gear icon for *Customize this dashboard* is a short cut to the *Preferences > Home Dashboard > My Reports* screen. There you can manage which saved reports will appear in your *My Reports* listing (by dashboard), which saved charts will appear on your various dashboards, and which shared reports are available for your use.

Selecting the gear icon on any dashboard will bring users to the *Preferences >> Dashboards* menu.

Tour 3.2 – Manage the Dashboard

Organize *Home* and *Project* dashboards for effectiveness and efficiency.

Check Your Understanding

1. Which of the following subsections is included in Saved Reports? (Select all that apply.)

    a) My Reports
    b) My Lists
    c) My Charts

2. *True or False*: Any user can share a saved report.

    a) True
    b) False

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

LESSON 4: REFERENCE REPORTS

Learning Objectives

- Identify the types of data available in each of the reporting sections
- Generate reports from the Reports Dashboard
- Select report criteria options based on desired data output

Introduction

The Reference reports dashboard contains a variety of built-in reports based on the Unanet license type and roles assigned to you. Reference reports can be utilized for quick insight into comprehensive data for use by select roles.

FINANCIALS

REPORT NAME	DESCRIPTION	REQUIRED ROLE(S)
Account Tree View	Displays account hierarchies as defined in Admin Setup in a “Financial” or “Cost Pool” view	Administrator P&R Administrator GL Viewer AP Viewer AR Viewer
Indirect Cost Rates (T&E)	Provides a detailed view of the Indirect Cost Rates by Fiscal Year as defined by the Administrator, including Target, Provisional, and Actual rates by Indirect Cost pool	Administrator P&R Administrator Project Manager + Cost Rate Manager Project Lead + Cost Rate Manager Project Approver + Cost Rate Manager Project Viewer + Cost Rate Manager Resource Requestor + Cost Rate Manager
Organization Tree Views	Displays an organization hierarchy using an “Organizational”, “Financial”, “Cost Pool”, or “Consolidation” Tree View	Administrator P&R Administrator GL Viewer AP Viewer AR Viewer

PROJECT

REPORT NAME	DESCRIPTION	REQUIRED ROLE(S)
Labor Category	Displays details of selected Labor Categories as configured in Admin Setup	Administrator P&R Administrator Project Manager Project Lead Project Approver Manager (or alternates)
Project Administrators	Presents a list of Project Administrators organized by Person Organization, including roles, org	Administrator P&R Administrator HR Administrator

	access, and projects assigned to each	

PEOPLE

REPORT NAME	DESCRIPTION	REQUIRED ROLE(S)
Approval Group Details	Displays Approver and Submitter information for Approval Group(s); Managers may only view Approval Groups to which they are assigned as Approver or alternate to the Approver	Administrator P&R Administrator HR Administrator Manager (or alternates) AP Manager (or alternates) AR Manager (or alternates) Purchasing Manager (or alternates)
Organization Access	Displays the Roles and Organization Access associated with selected users	Administrator P&R Administrator HR Administrator

Activity 4.1 – Run Reference Reports

Log in as the Project Viewer Donna Planner (*dsplanner/welcome*) to generate a detailed view of the indirect cost rates defined in MyCo's system by Fiscal Year.

Activity Steps

Part 1: Indirect Cost Rates Report

1. Navigate to **Reports > Reference**.
2. In the *Financials* column, select "Indirect Cost Rates".
3. Select the report criteria as indicated below:

COST STRUCTURE:	Division A
DATE RANGE:	Calendar – Previous Quarter

4. Press **Run Report**.

Log in as the Administrator Frank Controller (*fcontroller/welcome*) to review approver and submitter information for approval groups.

Part 2: Approval Group Details Report

1. Navigate to **Reports > Reference**.
2. In the *People* column, select "Approval Group Details".
3. Select the report criteria as indicated below:

REPORT ON:	All Approval Groups I can see
APPROVAL GROUP:	Consulting-Time

4. Press **Run Report**.

Check Your Understanding

Which report will display an organization chart arranged by organizational, financial, or cost pool hierarchy?

a) Account Tree Views
b) Organization Tree Views
c) Organization Access

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

APPENDIX A: CHECK YOUR UNDERSTANDING ANSWER KEY

Lesson 1: Introduction to Reporting

1. Which of the following options are included in the Reports menu? (Select all that apply.)

    a) **Dashboard**
    b) **Saved**
    c) Shared
    d) **Adhoc**
    e) **Reference**
    f) Resource
    g) **Analytics**

2. *True or False*: All users can see and access all reports.

    a) True
    b) **False**

Lesson 2: Reports Dashboard

1. Which categories appear on the Reports Dashboard? (Select all that apply.)

    a) **Financial**
    b) Purchasing
    c) **Contract**
    d) Accounting
    e) **Project Accounting**
    f) **People**
    g) **Resource**
    h) **User**

2. Within which categories can the Cost Summary report be found?

    a) Financial - Periodic
    b) Financial - Summary

c) **Project Accounting - Periodic**
d) Project Accounting - Summary

3. *True or False*: Any role that enables a user to view *Project* reports combined with the *Cost Rate Manager* role will allow the user to view *Project Accounting* reports.

   a) **True**
   b) False

Lesson 3: Saved Reports

1. Which of the following subsections is included in Saved Reports? (Select all that apply.)

   a) My Reports
   b) My Lists
   c) My Charts

2. *True or False*: Any user can share a saved report.

   a) True
   b) **False**

Lesson 4: Reference Reports

Which report will display an organization chart arranged by organizational, financial, or cost pool hierarchy?

a) Account Tree Views
b) **Organization Tree Views**
c) Organization Access

APPENDIX B: SUPPLEMENTAL INFORMATION

Reference Links

Unanet GovCon Glossary of Terms

Reports Dashboard

GC | Sys Doc | Reports Dashboard
GC | Sys Doc | Dashboard and Reference Reports by License Type
GC | Sys Doc | Reports Dashboard - Financial Reports
GC | Sys Doc | Reports Dashboard - Project Accounting Reports
GC | Sys Doc | Reports Dashboard - Contract And Project Reports
GC | Sys Doc | Reports Dashboard - People Reports
GC | Sys Doc | Reports Dashboard - Resource Reports
GC | Sys Doc | Reports Dashboard - User Reports

Saved Reports

GC | Sys Doc | Reports – Working with Saved Reports, Charts, Lists
GC | Sys Doc | Creating Saved Reports on Your Dashboards

Reference Reports

GC | Sys Doc | Reports – Reference Dashboard

NEXT STEPS

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