Unanet University

UNANET GOVCON:
SETTING UP PROJECTS

PARTICIPANT GUIDE

Last Revised March 16, 2022

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ABOUT THIS PARTICIPANT GUIDE

This document serves as a supplement to the training courses offered through Unanet University. Participants should use this workbook to complete exercises in the student Unanet system while attending the course. Additionally, participants should record notes and actions for reference when working within their own Unanet system.

Symbols used in this guide

Activity

Important Note

Demo

Question

Tour

Unanet Contact Information

- VirtualUU@unanet.com

Send questions here for information about courses, course schedule, unanetuniversity.com, certifications, and enrollments. This is a mailbox that is monitored daily.

Support Portal

To improve your experience in accessing our support resources, all Knowledge Center articles and FAQs have been relocated to the Unanet Support Portal, located at support.unanet.com. You will need a Support ID to access the portal, which you can acquire using the steps below:

> To obtain a login to the Unanet support portal or to create a new ticket, send an email to support@unanet.com with the "Support Portal ID request" in the Subject line.
>
> 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., it cannot be from gmail.com, aol.com, or msn.com).

The company must have an active support agreement with Unanet.

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.

COURSE INTRODUCTION

In this course, you will create and set up projects to support a variety of billing types in support the project management lifecycle. Topics include task setup, people assignments, project administrators, and project notes and alerts.

Objectives

After this session for **Setting Up Projects**, participants will be able to:

- Create project and task settings that create efficiencies
- Create people assignments to allow labor and expense charges on the project
- Set up tasks for the Work Breakdown Structure (WBS) with dependencies
- Create project alerts

Roles & Access

It is helpful to be familiar with the Unanet roles and the access that comes with each unique role.

Please note, the password is case sensitive; login name is not.

	Unanet Role	Name	Unanet Login Username	Password
Project Manager	Project Lead, Resource Planner, Resource Assigner, Manager	Gus Lead	**glead**	**welcome**
Contracts Manager	Project Manager, Bill Rate Manager	Fay Contracts	**fcontracts**	**welcome**

MyCo Narrative

MyCo is a growing company with just under over 30 employees and a small number of sub-contractors. They have around 20 project they are working, in both the Government Contractor (GovCon) and Commercial spaces. Their contracts include time and materials, fixed price, and cost plus. The culture at MyCo is very conservative on their decisions to allow users access to individual cost rate information of the staff. As such, the project management team is responsible to manage the project setup, resource allocation, and manage the labor hours and expenses charged to their respective projects. The Finance team is responsible for all revenue and profitability metric management for projects.

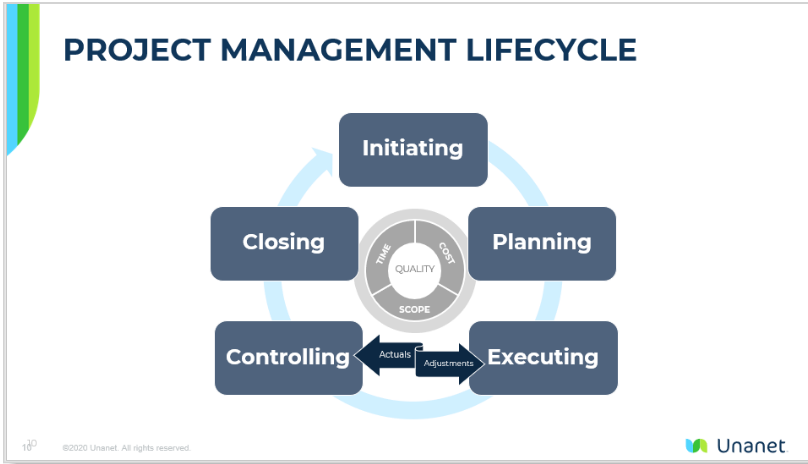
With these management decisions, the project setup and management team does not have the cost rate manager role and has not configured their system to allow non-cost rate managers access to the project accounting reports.

During this course, you will log in as two primary users. Each user has the Unanet roles needed to support the tasks asked of them.

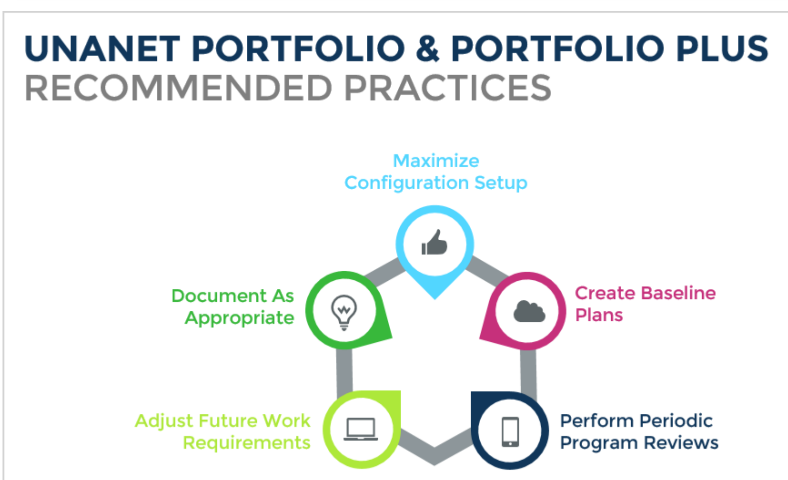
Fay Contracts: Fay is MyCo's Contracts Manager and responsible for setting up all billable projects. Fay wants to configure the projects to support the Project team's efforts to run the projects more efficiently.

Gus Lead: Gus is the Project Manager of several projects; he creates and manages the tasks, creates the baseline plan, and manages the contract metrics that include contract compliance and resource utilization. Finally, while Gus is not responsible to manage the revenue targets on the projects, he is responsible to maintain the contractual balance of skilled labor, accurate expenses and is required to maintain the billable hours within a specific range of hours.

Project Management Lifecycle



Unanet License Types



Understanding Core Project Management Functionality

Calculating Costs and Revenue:

- Time and Material (TM)
- Fixed Price (FP)
- Cost Plus (FP)
- Non-Billable (NB)

Organization Setup:

- Owning Organizations
- Project Organizations

Accessing Project Management Features

Tour 1.0 – Review Admin Setup for Project Functionality

Review setup and properties that the System Administrator has control over that determines how you use the available functionality.

Admin Setup: Primary Project Tables:

- Project > Types, Status, and Notes
- People/Time > Labor Categories, Skills, and Pay Codes
- Expense > Types
- Accounting > Items, Cost Reports, Invoice Setup tables

Admin Properties: Project Settings

Unanet > Access/Permissions

Rate Permissions

- Allow Project Cost Reporting for Non-Cost Rate Managers

Planning > General

- Enable Multiple Plan Sets
- Allow Project Leads to Access Plan Sets

People Setup: Project Management Roles

Setup/Management Roles

- Project Manager
- Bill Rate Manager
- Bill Budget Manager/Viewer
- Cost Budget Manager/Viewer
- Resource Planner
- Resource Assigner
- Project Lead
- Project Approver

End User Roles

- Timesheet User
- Expense User
- UnaSource User

LESSON 1: PROJECT AND TASK SETTINGS

Learning Objectives

- Create project and task settings that create efficiencies.
  - Review user configuration
  - Setting Up Projects to support the PM Lifecycle
  - Review recommendations for managing triple constraints
  - Maintain projects with efficiencies
- Create project alerts

Introduction

Projects can be configured to control specific elements of the contract such as allowing time or expenses, the beginning and ending of the contract, and which users, labor categories and expenses can be charged to the project.

In Unanet, a user with the Project Manager role is allowed to create and set up a project's required fields while a user with the Project Lead role can view the project setup and create and manage the tasks associated with the project.

Demo 1.1 – Review User Configuration

Review and update the project and tasks to help the project team manage the project as it relates to managing hours and resources. Log in as ***fcontracts***.

Demo Steps

Part 1: Identify Roles Relevant to the Project Management Team

1. Navigate to **My Account** > **Preferences** > **Roles tab**
2. Hover over the Information icon on each role listed below to review the type of feature and functionality granted by the role

Project Roles		Primary Function
Project Manager	--------->>	Create Projects
Bill Rate Manager	--------->>	Update Labor Rates
Resource Planner	--------->>	Creates Project Plans
Resource Assigner	--------->>	Creates People Assignments

Project Administrators		Primary Function
Project Lead	-------->>	Create Tasks
Project Approver	-------->>	Approves Project Documents

Part 2: Set Up Project Administrators

1. Navigate to Contracts > Project> **Dashboard** > Left-side dashboard > run **Saved List - My Projects**
2. Edit > **CUSTOMER-4 PRJSETUP-ADMINISTRATORS**
3. Navigate to **Administrators** > **Project Approver**
4. Check the box for **Project Approver Approves Before Managers**
5. In the **ASSIGN PRIMARY PROJECT APPROVERS** sections, filter for **UU Lead** and select **Gus Lead**
6. Associate **Gus** as the **Primary Approver** for **Timesheets** and **Expense Reports**
7. Click **Save**
8. In the **ASSIGN ALTERNATE PROJECT APPROVERS** section, filter for **UU User**
9. Associate **Genevieve** as the **Alternate Approver** for **Expense Reports**

Part 3: Set Up Default Project Alerts

1. Navigate to Contracts > Project> **Alerts**
2. Update the settings for Fay's default alerts include the following:
    a. **Alert Methods**: Unanet Dashboard and email
    b. **Show Alerts to**: Project Manager, Project Lead, and Project Approver
    c. **Show Alerts when**: ensure that Project Hours will trigger when more than 75% of the budget has been exceeded
3. Click **Save**

Initiating Phase: Setting Up Projects to support the PM Lifecycle

There are very few required fields to create a new project. However, depending on the purpose of the project and configuration choices when creating the project, other setup may be needed to execute the project with accuracy and efficiency.
Below is a list of configuration selections that is typically required either by system settings or common practice for project management of billable efforts.

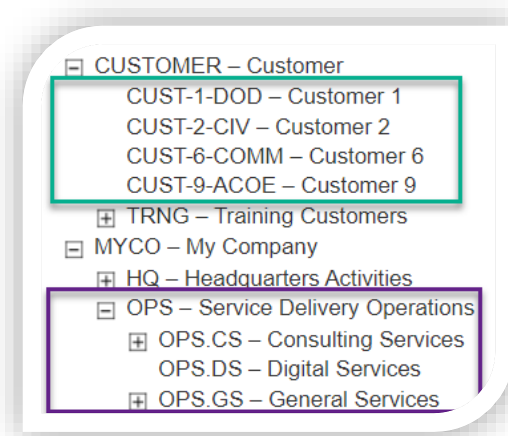
Additional information and recommended practices on setting up projects can be found in the Support Portal '***Configuration Guides - Project Setup'***

PROFILE TAB

- **Project Status** is required by the system. This field is configured by your administrator. Projects must have an (active) setting in the name of the status to allow users to charge to it or appear in reports by default. Projects with an (inactive) in the name cannot be used in posting processes or end user charging.
- **Owning Organization** is required by the system. This field should be the organization that will be used to report cost and revenue for charges on this project. It is typically configured as a financial organization by your administrator and commonly referred to as the department/division that is 'doing' the work on the project.
- **Project Organization** is required by the system. This field should be the organization that is going to be billed for the charges on this project. It is typically configured as a customer organization by your administrator and commonly referred to as the 'customer' that will be billed for the work on the project.

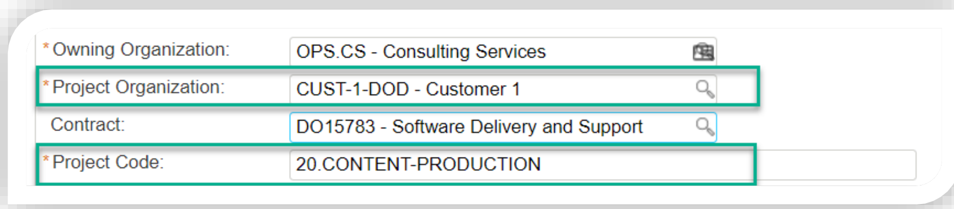
While all organization records appear in these organization filters, you will want to ensure that you select the correct organization for each.

Naming conventions are typically used by the administrators to help identify an owning organization from a project (customer) organization.



- **Project Code** is required by the system. This field can contain 25 characters, no spaces are allowed. While special characters can be used to create a segregated coding convention, it is recommended to only use a dash (-) between the components to create a code. More information on recommended project naming conventions can be found in the support portal.

  Projects are unique in the database using the project organization and project code combination.



As such, you could have many customers with the same project code but you cannot create two projects with the same code for the same project organization (customer). It is more common to create unique project codes regardless of the project organization field.

- **Project Type:** is required by the system. It is a key reporting field and may be **used** to categorize different types of projects. The choices available have been configured by the system administrator, typically during implementation. Types with the billable flag enabled will be available in the Billing and Revenue Post.

BUDGET TAB

- COMPLETED PERCENT – This is an optional field which may be either populated manually or auto-calculated by the system. It is used to determine how the system will calculate the completion level of a project.
- PROJECT DATES – Revised Start and End Dates are both required fields. New projects will default to BOT/EOT; however, these fields should be updated to reflect the contractual beginning/end dates for the project.
  - The "Enforce Project/Task Dates" controls if users can enter time or expense charges beyond the revised start/end date. It is recommended to check this box on all billable projects.
- BUDGET SECTIONS – These are optional and primarily used for reporting purposes. Entering budgets for hours, labor and/or expenses does not prevent charging against the project in these areas.

Budgets can be created at the project level and/or the task level. There is no direct relationship between project level and task level budget entries. They can be used independently of each other.

ACCOUNTING TAB

- ACCOUNTING Section – These are optional fields to create a project; however, they become required if the project will be used for billing and cost reporting.
    - Billing Type: determines how the system will calculate revenue
    - Posting Group: used to determine how the posting procedures will be applied to the project.
    - Cost Structure: used to define a project's ***default*** indirect cost structure
- PROJECT VALUE Section - These are optional fields to create a project. They can be used to help manage a project using the project accounting reports. The Limit Billing and Limit Revenue flags help control these functions by using the funded value.
- FEE(S) – This is an optional field. It is used to define the fee calculations on projects with a Cost Plus (CP) billing type.

ACCESS TAB

The *Access* tab is used to define access permissions for various roles. The key setting for this course is the self-assign flag.

- SELF-ASSIGN - Describes whether any user can assign them self to this project (and thus, have access to apply time and or expenses to this project). If this value is unchecked, then the resource assigner will need to explicitly Assign People or Assign Organizations to this project.

For billable projects, it is highly recommended to ALWAYS uncheck this flag.

TIME TAB

The *Time* tab is used to manage time specific project rules. For the purpose of this course, the following fields are more relevant to support billable projects.

- ALLOW TIME REPORTING - This indicator is used to indicate that a particular project is available for time reporting. For example, you may have a project that is only valid for charging expenses against, in which case, you would uncheck this option. This can be overridden at the task level.

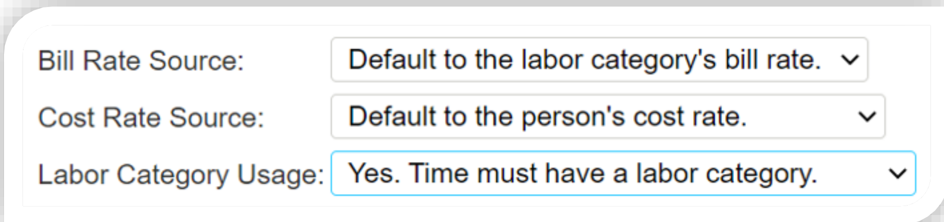
For projects that may be subject to the DCAA compliance requirements, consider using the **Allow Future Charges** and **Require Comments** fields. More information on DCAA compliance is located in the Support Portal and the Help Docs.

- BILL RATE SOURCE: Determines the default value for the bill rate.
- COST RATE SOURCE: Determines the default value for the cost rate

These default sources influence which option is selected by default creating people plans or assignments.

- LABOR CATEGORY USAGE: This field determines whether a Labor Category is required or allowed when charging time to a particular project.

To support the objectives for this course, the following settings are recommended for all projects, regardless of Billing Type.



EXPENSE TAB

The *Expense* tab is used to manage expense specific project rules.

- ALLOW EXPENSE REPORTING: If checked, this indicates that you can enter expenses against this project on an Expense Report or Vendor Invoice. For example, you may have a project that is only valid for charging time against, in which case, you would uncheck this option. This can be overridden at the task level.

ITEMS TAB

The *Item* tab is used to manage item specific project rules.

- ALLOW ITEM REPORTING: This indicates whether item transactions can be charged to the project. For example, you may have a project that should only accept labor charges, in which case, you would uncheck this option. This can be overridden at the task level.

ALERTS

The *Alerts* tab is used to manage project specific Alert information and to enable alerts for a particular project. Note that you can also enable alerting on a task level. Default Alerts belong to the user identified as the Project Manager on the Project Administrator’s menu.

Project Administrator Menus

TASKS: The use of tasks is optional. Project Managers and Project Leads can manage task data.

> Tasks are work activities under the project level. Tasks can mirror a project work breakdown structure (WBS) from another system or project planning tool but also can be built directly in Unanet.
>
> Tasks allow for more granular charging, while still featuring many of the options available in Projects. These options include budgets, alerts, billing type, project type, Owning Org, and more.
>
> Unlike Projects, Tasks do not have the ability to have their own project administrators, pay codes, expense types, locations, labor categories, and funded values, as these are assumed from the project level.

ADMINISTRATORS: This feature is used to define which users have responsibilities for a particular project. Several types of project administrator roles exist. A few common examples include:

- **Project Manager**: This is the only required administrator. The PM has edit ability for most project fields and reporting on the project.
- **Project Lead**: This is an optional role that can be assigned to any active user except those with the Customer role. The Lead has edit ability for tasks, a handful of Project fields, and reporting on the project.
- **Project Approver**: This is an optional administrator that can approve documents such as time, expense, vendor invoices and purchasing documents. Project approvers can be configured to approve prior to any Manager Approvals.

LABOR CATEGORIES (LCAT): This project-level feature provides the Project Manager with the ability to limit which LCATs will be available for creating plans and assignments and charging time for a project. LCATs can have project-level bill rates that escalate based on contractual rates.

EXPENSE TYPES and **ITEMS**: These two menus operate using the same logic as Labor Categories. A Project Manager can limit the list of Expense Types and/or Items available for a project.

> Project Level tables such as LCAT, Expense Types provide additional controls for the PM to better manage the scope of the project.

Project Setup Considerations

There are many considerations when determining the appropriate setup of a project to best meet the needs of the project managers as well as finance team. It is recommended that the important metrics for both groups are determined before project setup. Below is a list of key topics to consider:

Project vs. Task

One of the most basic questions you must be able to address is, do I create this as a Project with Tasks, multiple Projects, or multiple Projects with Tasks? To answer these questions, you must take into consideration the following:

Project Administrators

Project Administrators are associated only at the project level. If you have tasks that need to have different Project Administrators, such as different approvers for timesheets and expenses, you will need to elevate those tasks to be projects. Otherwise, all Project Administrators will have the same access to the project and all tasks.

Labor Categories, Expense Types, Pay Codes, Locations, and Items

Same logic is true for project level tables. You can limit if a task allows time, expenses and/or items. However, any task that allows time, as an example, will have access all of the project level labor categories. Another example would be a project that limited the expense types to only the allowable ones on the contract. Any task that allows expense charging will be limited to the same list from the project level expense type settings.

Customer Billing & Invoicing

If your customer requires separate invoices any of the tasks on the contract, you will need to elevate those tasks to be projects. While you can invoice multiple projects on one invoice, it is not recommended for task invoicing.

Report Requirements

If you need to break out specific tasks to a report, you will need to elevate those tasks to be projects. While many reports include selection criteria to display task level information, you cannot select a particular task(s) for specific reporting.

Recommendations to Manage a Project's Triple Constraints

Tour 1.2 – Setting Up Projects to Manage Triple Constraints

SCOPE: includes the contractual boundaries of what the project is designed to deliver; this may be called a statement of work, a work description, or a contractual clause. The system has several configuration recommendations to help control what can be charged on the project. It also provides an approval process to allow a project approver to review financial documents such as timesheets, expense reports, invoices and purchasing documents. Some of these settings include:

Project Profile Tabs

- Profile Tab:
  - ***For Strictest Control***: check Project Management Level to Manage at Task Level to control where Time, Expense, and Items are charged
  - ***For Reportable Insight***: uncheck Project Management Level for Manage at Task Level and check boxes to Require Tasks for Time, Expense and/or Items
- Access Tab:
  - User Access:
    - Self Plan – choose 'Closed' for tightest control or 'Assigned' to allow current users on the project to update their plans
    - Assign Self Plan - uncheck for a billable type effort
    - Self Assign –uncheck for a billable effort
- Time Tab
  - Check Allow Time Reporting if project allows time charges
  - Check Require PO for Non-Employee (PO) Time if subcontractors will use a purchase order to charge time on this project
  - Labor Category Usage – Recommending to always use 'Yes. Time must have a labor category'. (this is regardless of billing type)
- Expense and Item Tab
  - same logic as Time Tab for allowing and POs
- Alerts Tab:
  - Enable and/or configure relevant alerts for the project

Administrator Menu (left side menu)

- Project Level Setup Tables:
  - Select contractually allowable entries for labor categories, expense types, items, locations, and pay codes
- People Assignments

        - Create people assignments in manageable periodic increments with a determined number of hours per each increment and ensure that assignment has specifically selected labor categories
            - General recommendation is to use the timesheet period as the assignment period increment

COST: The cost includes anything that will be charged against your project, directly or indirectly. The project approval process is the best recommendation to help control costs; however, there are several settings that help support cost controls. They include:

Project Profile Tabs

- Profile Tab
    - Check Manage at Task Level box to control assignments by task
- Budget Tab
    - Add an overall project level Labor Hours Budget
    - Labor & Expense Budget Sections
        - Budgeted Bill $
        - Budgeted Cost $

Administrator's Menu (left side menu on a project)

- Project Administrators
    - Add Project Approvers to require approval oversight for any charges on the project
- Project Assignments
    - Enter hours budgets on assignments
    - Use manageable incremental assignments vice a block of hours for the period of performance
        - Budgeted Burdened Cost $

TIME: The system offers the following controls to help your team keep their charges within the boundaries of the contractual dates on the projects and tasks.

Project Profile Tabs

- Budget Tab
    - Enter dates in the Revised Start and End date fields
    - Check the Enforce Project/Task Dates box

Supporting the Triple Constraints on Project Task

Tasks have many fields that can also support controls for scope, time and cost. Below are the primary controls available to project tasks.

To help control the **Scope** of the project:

- Profile Tab:
    - Enable Alerts for a specific task
- Time Tab

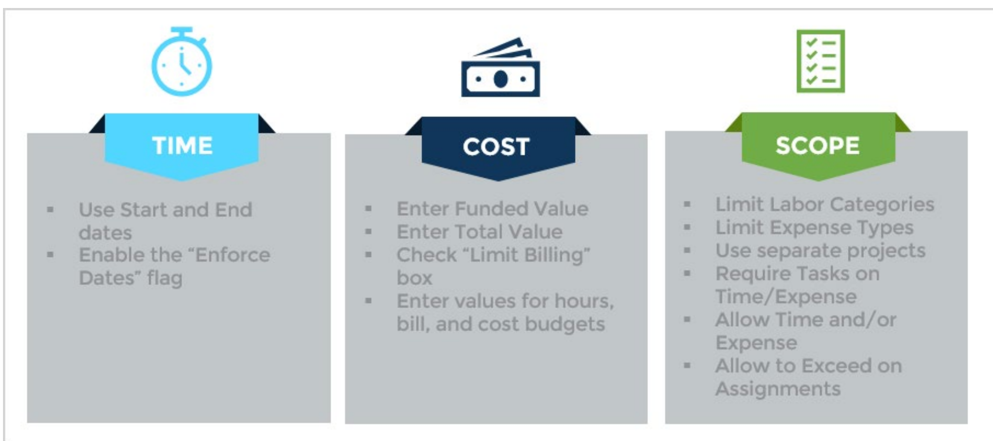
- Override Project Settings for Time, Expense and Item Reporting

To help control the **Cost** constraint of the project:

- Budget Tab
  - Enter Labor Hours Budget
  - Labor & Expense Budget Sections
    - Enter Budgeted Bill, Cost, and Burdened Cost values

To help control the **Time** constraint of the project:

- Budget Tab
  - Enter dates in the Revised Start and End date fields
  - Ensure that the project's budget tab has checked the Enforce Project/Task Dates box. This will restrict timesheets and expense reports from creating charges before and after the revised dates.



Maintaining Projects with Efficiencies

Unanet provides four billing types for any project and/or task to include Time and Material (TM), Cost Plus (CP), Fixed Price (FP) and Non Bill (NB). In addition to the recommendations above to control the project, each billing type provides an opportunity

The project teams at MyCo have many contracts that have similar setup. Last year, the finance, contracts, and project teams worked to create templates for the various billing types on billable projects. The templates have helped reduce setup and execution errors.

Setting Up Time & Materials Projects

Time and Material (TM) is one of four billing types available for projects that calculate revenue. In TM efforts, labor values for revenue/cost are determined by multiplying hours by applicable rate. In contrast, expense values for revenue/cost are determined by the direct cost of the expense multiplied by a ***fixed*** markup percentage. Be aware, if your contract allows for expense type charges to be billed back to the customer at direct cost plus applicable indirect rates such as General & Administrative fees (G&A), this type of effort must be configured as a Cost Plus (CP) effort in Unanet.

When setting up TM efforts, you could create a project with multiple tasks that include either a FP or TM billing type. While this configuration does allow for accurate billing, it does create a challenge for managing the efforts components and overall reporting. The overall recommendation is to separate an effort into like-kind billing types. If a contract requires that all components be billed/invoiced together, the billing setup easily supports this type of configuration.

If a TM effort includes a Cost-Plus component, which is common with expenses, it is important to understand that Cost Plus (CP) projects will also limit the tasks to a CP billing type. Again, the Lead/Contributor feature on a project can help support a mix of billing types on a contract.

As mentioned above, time and material revenue calculates labor by multiplying hours by the applicable bill rate. If the project > time tab sets the Bill Rate Source at the Labor Category bill rate, as recommended, then a project manager with the bill rate manager role can customize the escalating bill rates directly on the project level table for labor categories.

Demo 1.3 – Review Project Setup for T&M Billing Type

Part 1: Create a new project using the copy project feature
Use the Template Project **(MYCO TEMPLATE_TM)**
Part 2: Review the Project Profile Tabs
Part 3: Review the project level menus in the left-side dashboard
Show how to import labor categories

Activity 1.4 – Create a Project with T&M Billing Type

Use the Add project button to set up a contract award for a T&M project.
Log in as ***fcontracts* / *welcome***

Exercise Steps

Part 1: Create a new project using the copy project feature

1. Navigate to Contracts > Project> **List**
2. Run **Saved List** > **Template Projects**
3. Locate the **MYCO TEMPLATE_T&M (Template for Time & Material)** project and click the copy icon
4. Take a minute to review the areas of the template project that can be copied over to a new project

   Notes and Saved Lists cannot be copied between projects

5. At the bottom of the screen, check the **Select All** box
6. In the **GENERAL** section, uncheck **Expense Types and Items**
7. In the **ASSIGNMENTS** section, uncheck **People Assignments** and **Expense Budgets**
8. In the **Plans** sections, check **NO PLANS**
9. Click the **NEXT** button to create the new project in edit mode

Part 2: Complete the Project Profile setup

1. Profile tab
   a. Project Status: Change to **2-Open (Active)**
   b. Owning Organization: Change to **GS-CYBER**
   c. Project Organization: Change to **CUSTOMER-3**
   d. Project Code: Change to **UU-TRAINING-TM-LABOR**
   e. Project Title: Change to **UU Training Project**
   f. Project Type: Change to **BILLABLE**
   g. Project Management Level: Change the **MANAGE AT TASK LEVEL** box to checked, and click **OK** to acknowledge the warning message
2. Budget tab
   a. In the COMPLETED PERCENT section, ensure **Estimate From** dropdown is set to **Hours**
   b. In the PROJECT DATES section:
      i. Revised Dates: enter 1/1/2021 – 12/31/2021
      ii. Ensure **Enforce Project/Task Dates** is checked
   c. In the HOURS BUDGET section, enter **1200** in the **Hours Budgeted** field
   d. In the LABOR BUDGET section, enter **100000** in the **Bill $ Budgeted** field

3. Accounting tab
    a. In the ACCOUNTING section:
        i. Billing Type: ensure it is set for **TM** for Time & Materials
        ii. Posting Group: ensure it is **Direct Posting Group [DEFAULT]**
        iii. Cost Structure: change to **Division B**
    b. In the PROJECT VALUE section:
        i. Total Value: enter **120000**
        ii. Funded Value: enter **60000**
        iii. Check **Limit Billing to Funded Value Less Fixed Fee**
    c. In the FEES sections: no updates needed; this section is only for projects with Cost Plus (CP) billing type
4. Access tab
    a. In the ORGANIZATIONAL ADMINISTRATORS ACCESS section: no updates needed, this section restricts access and overrides the roles

    Use the Access tab as an exception, not a rule for projects

    b. In the USER ACCESS section:
        i. **Self Plan** dropdown select **Assign. Only people assigned can plan their time.**
        ii. Ensure **Assign Self Plans** is unchecked
        iii. Change **Self Assign** to unchecked
5. Time tab
    a. Ensure **Allow Time Reporting** is checked
    b. Ensure **Allow Future Changes** is unchecked
    c. Ensure **Require Comments** is checked
    d. Ensure Bill Rate Source is set to **Default to the labor category's bill rate**
    e. Ensure Labor Category Usage is set to **Yes. Time must have labor category.**
6. Expense tab
    a. Ensure **Allow Expense Reporting** is unchecked (this activity is for a labor only effort)
7. Items tab
    a. Ensure **Allow Item Reporting** is unchecked (this activity is for a labor only effort)
8. Alerts tab
    a. For PROJECT PERFORMANCE ALERTS select **Use Default Preferences**
9. Other tab
    a. Review the list of User Defined Fields set up for Projects
    b. No updates needed
10. Review all tabs, then click **Save**

Part 3: Update the project level menus in the left-side dashboard

1. Remain on your new project: **CUST-3 UU-TRAINING-TM-LABOR**
2. **Tasks** menu: No updates needed. We will assign a Project Lead and have them manage the tasks.
3. **Administrators** menu
    a. Click on **Project Lead** > filter for Last Name of ***%LEAD*** > use the right move arrow to filter > note that UU Lead, Gus is in the drop down
    b. Click on the Project Approver > note that Gus is the Primary Approver for Timesheets and Expense Reports (this came over with the template)
    c. In the ASSIGN ALTERNATE PROJECT APPROVERS section, assign an Alternate Project Approver for Time and Expense
    d. > filter for Last Name of ***%LEAD*** > use the right move arrow to filter the list > select ***UU Lead 00 (Lead), Genevieve*** > select Expense Report and Timesheet and move this combination to the right
    e. Click **Save**
4. **Billing > Invoice Setup**
    a. Check the box to GENERATE UNANET INVOICE
    b. In the INVOICING OPTIONS section, select Invoice as Lead Project (we will add the contributing projects in a follow-on activity)
    c. Click **Save**
5. **Labor Categories** menu
    a. Click the **List** tab to view the current LCAT's from the template
    b. Click the edit icon for **UU-APSTAR-Business Systems Analyst**
        i. Change the radio button to 'Custom Rates'
        ii. Use the add row button to add a new bill rate
        iii. Use an Effective Date of the 1st day of next month
        iv. Use a Bill Rate of $110
        v. Click Save
    c. Click **Export** menu to export all LCAT's
        i. Normally you would update the spreadsheet with new rates and import, but use the prepared file for this activity

The import file 'UU_Import_LaborCategories' is located in the **Materials** section of GoToTraining.

    d. Click **Import** menu to import the prepared LCAT file
        i. Use the file provided in the course materials
    e. Once the file imports, click the Back button to return to the LCAT list
    f. Click the **List** tab to view the updated entries

It should look ***similar*** to image below

Projects – Labor Categories List for CUSTOMER-3 UU_TRAINING_PROJECT (Template for UU Training Class)

Search | **List** | Labor Category

LABOR CATEGORY	EFFECTIVE DATE	BILL RATE
UU-00-SELECT A LABOR CATEGORY!!	BOT	$0.00
UU-APSTAR-Business Systems Analyst	BOT 1/1/2019 1/1/2020 1/1/2021	$0.00 $50.00 $52.00 $54.08
UU-APSTAR-Project Manager	BOT 1/1/2019 1/1/2020 1/1/2021	$0.00 $100.00 $104.00 $108.16
UU-APSTAR-System Engineer	BOT 1/1/2019 1/1/2020 1/1/2021	$0.00 $120.00 $124.80 $129.79

Setting Up Cost Plus (CP) Projects

A billing type of CP, cost plus, will calculate revenue and costs associated with a project based on the direct cost plus any set of indirects mapped in the cost structures plus any configured fee calculations set up on the accounting tab of a project.

The CP billing type is unique in that no other billing type can be used on a task for a project that has been set up as a CP billing type. Additionally, the fee calculation methods are variable based on the Admin > Setup configuration for fee calculation methods.

Demo 1.5 – Review Project Setup For Cost Plus Billing Type

Instructor is logged in as Fay Contracts (fcontracts / welcome)

Part 1: Create a new project using the copy and search for project feature
- Use project **CUST-3-UU3 PRJSETUP-LEAD-PROJECT**

Part 2: Review the Project Profile Tabs
- Change PM Level to Manage at Task Level
- Review the need for tasks
- Change billing type to CP and required setup
- Discuss TM/FP/NB task conflict with CP billing type

Part 3: Review the project level menus in the left-side dashboard
- People Assignments / Expense Budgets (relative to management Level)
- Labor Categories: Review logic on using LCATs
- Expense Types: Review logic on limiting
- Billing Setup (highlight associating the contributor projects)
    - Set new project us as a contributor to **CUST-3-UU3 PRJSETUP-LEAD-PROJECT**

Activity 1.6 – Create a Contributing Project for a Cost Plus (CP) Contract

Use an existing TM project as a template to set up a contributing project with a CP billing type.

Exercise Steps

Part 1: Create a new project using the copy project feature

1. Navigate to Contracts > Project> **List**
2. Filter for owning organization code **GS-CYBER** and click on the List tab
3. Use the copy project button on the **UU-TRAINING-TM-LABOR** project
4. At the bottom of the screen, check the **Select All** box
5. Click the **NEXT** button to create the new project in edit mode

Part 2: Complete the Project Profile setup

1. Profile tab
    - a. Project Code: Change to **UU-TRAINING-CP-EXPENSES**
    - b. Project Management Level: Change the **MANAGE AT TASK LEVEL** box to unchecked, and click **OK** to acknowledge the warning message
    - c. Uncheck the Require Tasks for Item Reporting (this will only allow labor and expenses)
2. Budget tab
    - d. In the EXPENSE BUDGET section, enter **20000** in the **Bill $ Budgeted** field
3. Accounting tab
    - e. In the ACCOUNTING section:
        - i. Billing Type: select **CP** for Cost Plus and click OK to acknowledge the warning message
    - f. In the PROJECT VALUE section:
        - i. Total Value: enter **120000**
        - ii. Funded Value: enter **120000**
    - g. In the FEES sections:
        - i. Calculation Method: choose **Fee on Total ODCs**
        - ii. Factor Type: choose **Percent**
        - iii. Factor: enter **10.25**
        - iv. Fixed Fee Amount: enter $**500.0**0
        - v. Use the add row icon to add a second fee record
        - vi. Calculation Method: choose Fee on Total Labor
        - vii. Factor Type: choose number
        - viii. Factor: enter 100.00
        - ix. Fixed Fee Amount: enter 500.00
4. Items tab

    a. Check the box for **Allow Item Reporting**
5. Click **Save**

Part 3: Update the project level menus in the left-side dashboard

1. Billing > Invoice Setup
    a. Check the box to GENERATE UNANET INVOICE
    b. In the INVOICING OPTIONS section, select Invoice as Contributor Project
    c. In the ASSIGN LEAD PROJECT FOR INVOICE GROUP section, filter for CUST-3 in the Org Code filter
    d. Select the **CUST-3-UU3 UU-TRAINING-TM-LABOR** project
    e. Click **Save**

2. ITEMS:
    a. Use the add button to add allowable items for this project
    b. In the Filter section > Code field, type **%UU-GOV** and filter the list using the right arrow button
    c. In the 'AVAILABLE ITEM TYPES' section, select all of the items in the list and move them to the 'ITEM TYPES FOR CUST…..' window
    d. Click Save

Setting Up Fixed Priced (FP) Projects

A billing type of FP, fixed price, will calculate revenue for a task or project based on the billing schedule for the project.

Users with the Billing Manager role can create the Billing Schedules for a FP project.

Projects that have a fixed amount of revenue but also require the invoice to be generated by hours worked needs to be configured as a Time and Material project. This type of effort is referred to as a Fixed Price – Level of Effort (FP LOE). While not common, it is possible that you may encounter a project with such requirements.

Demo 1.7 – Review Project Setup For Fixed Price

Part 1: Create a new project using the add new project button

Part 2: Review the Project Profile Tabs

- FP billing type and required setup (discuss how revenue is calculated)
- Review Completed % fields on Budget tab

Part 3: Review the project level menus in the left-side dashboard

- Labor Categories: Review logic on using LCATs
- Review Unanet Pay option for electronic customer payments

Activity 1.8 – Create a Project with Fixed Price Billing Type

Use the Add project button to set up a contract award for a Fixed Price (FP) project without using a template.

Exercise Steps

Part 1: Create a new project using the add new project feature

1. Navigate to Contracts > Project> **Dashboard**
2. Use the **Add Project** button ⊕ to add a new project

Part 2: Complete the Project Profile setup

1. Profile tab
    a. Project Status: Change to **2-Open (Active)**
    b. Owning Organization: Change to **GS-CYBER**
    c. Project Organization: Change to **CUSTOMER-3**
    d. Project Code: Change to **UU-TRAINING-FP-EXPENSE**
    e. Project Type: Change to **BILLABLE**
2. Budget tab
    a. In the PROJECT DATES section:
        i. Revised Dates: enter 1st of next month – 12-month effort
3. Accounting tab
    a. In the ACCOUNTING section:
        i. Billing Type: select **FP** for Fixed Price
4. Access tab
    a. In the USER ACCESS section:
        i. Uncheck the box for **Self Assign**
5. Time tab
    a. Uncheck the box for **Allow Time Reporting**
6. Expense tab
    a. Ensure **Allow Expense Reporting** is checked
7. Items tab
    a. Uncheck the box for **Allow Items Reporting**
8. Alerts tab
    a. no updates needed
9. Click **Save**

Part 3: Update the project level menus in the left-side dashboard

1. On the left side Administrator's menu, navigate to **Billing > Fixed Price menu**
2. In the ADD FIXED PRICE BILLING SCHEDULE FOR section
    a. Use the add button ⊕ to add a new **Fixed Price Billing Schedule**
        - Description: type **Quarterly Subscription Invoice**
        - Bill Date: enter the 1st of next month

- Bill Amount: type 100,000
- Revenue Recognition Method: check 'when billed'

b. In the BILLING SCHEDULE
   - In the Split into Periods section, choose Calendar Quarters, 4 as the number or periods and choose 'First Day of the Period'
   - Click the 'Generate Schedule' link to display the new proposed schedule

c. Click Save to generate the billing schedule. It will look similar to this:

Projects – Fixed Price Item List for CUST-3-UU3 UU_TRAINING_FP_SUBLABOR (UU T

Fixed Price Item   Fixed Price Billing Schedule

		TASK	BILL DATE	DESCRIPTION	AMOUNT	REVENUE REC DATE	REVENUE REC AMOUNT
		—	1/1/2021	Invoice	$25,000.00	When Billed	$25,000.00
		—	4/1/2021	Invoice	$25,000.00	When Billed	$25,000.00
		—	7/1/2021	Invoice	$25,000.00	When Billed	$25,000.00
		—	10/1/2021	Invoice	$25,000.00	When Billed	$25,000.00
Total Rows: 4					$100,000.00		$100,000.00

3. On the left side Administrator's menu, navigate to **Expense Types**
   a. Use the add button to add allowable expense types for this project
   b. In the Filter section, type **%** and filter the list using the right arrow button
   c. In the 'AVAILABLE EXPENSE TYPES' section, select a few expense types and move them to the 'EXPENSE TYPES FOR CUST….. window
3. Click **Save**

Check your understanding

If you have tasks that need to have different Project Administrators, such as different approvers for timesheets and expenses, you will need to elevate those tasks to be projects.

a) True
b) False

To help control the 'Time' constraint of a project, what flag in the Budget tab can be turned on?

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

LESSON 2: CREATE PEOPLE ASSIGNMENTS

Learning Objectives

Create people assignments to allow labor and expense charges on a project.

Introduction

In Unanet terms, an Assignment is a ‘work authorization’ for a user to charge time to a project or task. Assignments may include a budget of hours used for capping or budgeting charges for labor, as well as for forecasting labor effort.

Along with other project settings, a person assignment is required for a user to create an expense report.

Additionally, assignments may be limited to specify project-specific rates, labor categories, performance dates, and locations. Expense Reports can be limited to specific types and allowable dates. Doing so, should minimize end-user errors and support the project management team with controlling the schedule, cost, and scope of a contract.

People assignments for labor and expense reports are controlled either at the Project Level, with no specific task identified for charging or with an explicit task associated with each person assignment. The setting to control which way assignments can be created is in the Project Profile > Manage at Task Level section.

There are numerous methods of creating and managing assignments in Unanet. For example, you could create one assignment for the entire performance period or create incremental assignments to help control the effort at a more granular level. Assignment can also be created directly from the project plans. Finally, some projects, such as a generic Admin – Indirect project may allow an assignment for any user within a specific Person Organization. The method that is best for your organization is dependent on a number of factors.

Assignments are unique in that each can have one project, task, labor category, location, cost element, etc for a specific date range. The dates on a new assignment cannot overlap the dates of an existing assignment. A common need to have more than one assignment on the same date is when users may charge two different labor categories on the same day. For example, a user that may need to charge a few hours as the project manager and other hours as the system engineer. For situations like this, the use of Task Level Assignments can be very useful.

All methods can be researched in the Unanet Support Portal. The activities below use a single assignment method, also referred to as a Period of Performance assignment.

Demo 2.1 – Review Purpose of Assignments

Review the purpose of assignments and where assignments reside in different menus.

Creating People Assignments

People assignments must be created according to the settings on the Project Profile tab's Project Management Level field. Depending on how the project manager intends to control the project's hours, costs and effort, the project might require assignments by specific task, or left at the project level. For example, if the Manage at Task level field is checked or if the Require Tasks for Time Reporting is checked then tasks are required on the project. Otherwise, Assignments and/or Timesheets will not be allowed.

Complete one of the activities below to create people assignments for projects in the portfolio using various techniques.

Activity 2.2a – Assignment for Project Level Management

Create people assignments for projects using the project level management.
Log in as ***glead***.

Exercise Steps

1. Navigate to Contracts > Project > List
2. Run **Saved List** > **My Projects**
3. Edit **CUST-4-UU4 PRJSETUP-ASSIGNMENT-PRJ-LVL**
4. Notice the Profile tab setting for Project Management level is unchecked for **'MANAGE AT TASK LEVEL'**
5. On the left-side menu open **People Assignment** > **List**
6. Click on the **List** tab (there will be no assignments)
7. Use the Add button Assignment to add a new single assignment
8. In the FILTER section:
    a. Filter for users in **Org Code** = **OPS.GS** and use the right arrow icon to filter
9. In the AVAILABLE PEOPLE section:
    a. Select **UU Lead, Gus** and use the right arrow icon to move Gus to the **ASSIGNMENTS FOR …** window
10. In the ASSIGNMENT OVERRIDES section:
    a. In the ASSIGMENT DATES section
        i. Ensure the **Link Dates to Project/Task Dates** is checked
    b. In the BUDGET HOURS section
        i. Select **Utilization**
        ii. Change the .5 (default value) to **.25**
        iii. Check the box for 'Allow the budget to be exceeded'

c. In the MISCELLANEOUS section:
   i. Select **Labor Category** of **APSTAR SYSTEM ENGINEER**

d. In the BILL RATE SECTION:
   i. Ensure that the default aligns to the project settings to show that the bill rate is set to the Labor Category.

Selecting a Labor Category on assignments is recommended on all projects

11. In the SEND E-MAIL NOTIFICATIONS section:
    a. In a real-world instance you may consider notifying a user, or others, that there has been a new assignment created.
    b. For this class we will ignore this option.
12. Click **Save**

Activity 2.2b – Assignment for Task Level Management

Create people assignments for projects using task level management.
Log in as ***glead***.

Exercise Steps

1. Navigate to Contracts > Project> **List**
2. Run **Saved List** > **My Projects**
3. Edit **CUST-4-UU4 PRJSETUP-ASSIGNMENT-TASK-LVL**
4. Notice the Profile tab setting for Project Management level is checked to **'MANAGE AT TASK LEVEL'**
5. On the left-side menu open **People Assignment** > **List**
6. Click on the **List** tab (there will be no assignments)
7. Use the Add button Assignment to add a new single assignment
8. In the FILTER section:
   a. Filter for users in **Org Code** = **GS** and use the right arrow icon to filter
9. In the AVAILABLE PEOPLE section:
   a. Select **Lead, Gus** and use the right arrow icon to move Gus to the **ASSIGNMENTS FOR …** window
10. In the **TASK FOR CUSTOMER …** window:
    a. Select **2. Design Specs** and use the right arrow icon to move this combination to the **ASSIGNMENTS FOR …** window
11. In the ASSIGNMENT OVERRIDES section:
    a. In the ASSIGMENT DATES section
       i. Ensure the **Link Dates to Project/Task Dates** is checked
    b. In the BUDGET HOURS section
       i. Select **Utilization**
       ii. Change to **.25** representing 25% of a Full Time Equivalent (FTE)
    c. In the MISCELLANEOUS section:

i. Select **Labor Category** of **APSTAR SYSTEM ENGINEER**

d. In the BILL RATE SECTION:

i. Ensure that the default aligns to the project settings to show that the bill rate is set to the Labor Category.

Selecting a Labor Category on an assignment is recommended for all projects with a 'BILLABLE' project type

12. In the SEND E-MAIL NOTIFICATIONS section:
    a. In a real-world instance you may consider notifying a user, or others, that there has been a new assignment created.
    b. For this class we will ignore this option
13. Click **Save**

Check your understanding

What is one way to create People Assignments?

a) Using the People Plan Menu and select the Assign Plans option
b) Using the Assign button from a people planner grid
c) Using the Forecast Dashboard features
d) Using an Import
e) All of the above

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

LESSON 3: TASK SETUP

Learning Objectives

- Setup task for the Work Breakdown Structure (WBS) with dependencies
- Project Alerts

Introduction

Time and expenses can be charged at either the project or task level in Unanet. User assignments and plans can also be associated at either the project or task level. Like projects, tasks can have their own effective dates, budgets, etc.

The Project Lead can create new tasks and edit most fields on the task profile such as the revised start/end date, set project alerts, allow time/expense/items, and create an hours budget for each task. Budgets at the task level allow for additional reporting analysis, if desired.

The use of tasks may be optional based on the project profile settings for Project Management Level. In general, tasks can be used in a number of ways to help manage the overall project. Tasks represent can represent a work breakdown structure (WBS) or can be used to represent multiple years on a contract that is funded one year at a time. Tasks, if managing people assignments at the task level, can limit which users can charge time and/or expense on a specific project. Tasks have budget fields to allow a project manager to enforce labor categories, to create tasks at the funding level, and/or to track billable milestones on a Fixed Price contract. To efficiently manage tasks, the Project Lead can create a Saved List in a project containing the tasks and use the Edit All button to update selected criteria like the Percent Completed or Hours Budget.

Be aware that project features such as administrators, expense types, labor categories, notes and alerts are controlled at the project level. As such, all tasks will have the same settings as the project for these types of controls.

Below are a few of the examples when setting up tasks may be more appropriate for managing your projects. Other examples are explained in more detail in the Unanet Support Portal.

Using Tasks for the WBS

Using Unanet tasks for a more granular work breakdown structure (WBS) allows project managers to create and track small, deliverable components of the overall projects. Time and expenses can be charged at the task level in Unanet. User assignments and plans can also be associated at the task level. Like projects, tasks can have their own effective dates, budgets, etc.

Using Tasks to Segregate Labor and Expenses

Sometimes labor and expenses need to be segregated on separate tasks for other reasons. If you choose to use tasks to segregate these efforts vice creating separate projects, it is recommended to check the ‘Manage at Task Level’ setting on a project profile. This will ensure true separation on which users can charge which task based on their relative people assignment on the project.

To accommodate this setup, a project can contain specific Labor tasks and Expense tasks. Only users who may charge expenses to a project are assigned to these expense tasks. As well, tasks designated for labor should have the Time tab enabled for allowing charging and tasks designated for expense should have the Expense tab enabled to allow charging.

Demo 3.1 – Review Task Structure and Task Lists

Review the function of task menus and lists.

Use the activity below to set up a common configuration for tasks on a project to manage the WBS and create assignments at the task level.

Activity 3.2 – Managing Tasks

Add a new task, associate it in the existing WBS, set alerts to monitor the hours and review the timeline as a Gantt chart. Log in as ***glead***.

Exercise Steps

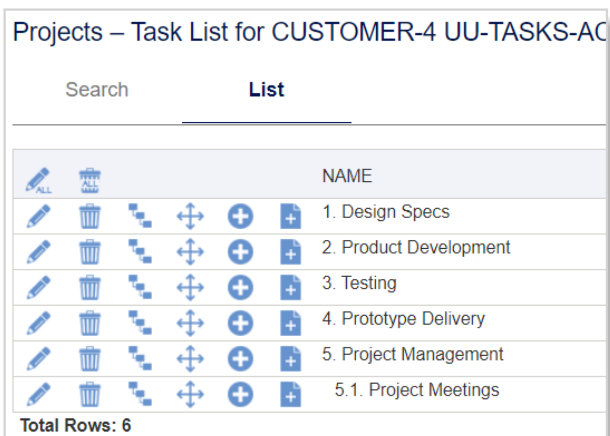
Part 1: Review and Modify the Task Structure

1. Navigate to Contracts > Project> **List**
2. Run **Saved List** > **My Projects**
3. Locate **CUST-4-UU4 PRJSETUP-TASK-MGNT** and click the Tasks icon
4. Review the Task Setup in Reports/Charts
    a. On the left-side menu navigate to **Reports/Charts**
    b. Open **Gantt Chart** and note all tasks have the same dates with no predecessor/successors configured
5. Insert a new task by using the copy button
    a. On task row **1. Project Management** use the add button to add a task
    b. In the drop down menu, choose the copy button to make a copy of this task
    c. On the Profile tab:
        i. Change the Name from **Copy of Project Management** to Contracts > **Project Meetings**
    d. On the Budget tab:
        i. Update the **Hours Budget** to **50**

e. On the Expense tab:
    i. Change the **allow expense setting** to **No**
f. Click **Save**
g. Navigate back to the left-side dashboard
h. Click the **Task > List > List** to navigate back the full task list

6. Demote a task to create a subtask
    a. On the task row **2. Project Meetings**, use the **Move icon** and select **Demote**
        i. Note that Project Meetings in now 1.1 and under/indented to 1. Project Management
7. Use the **Move icon** to move **1. Project Management** to the bottom row by selecting **Move Down to Bottom**
    i. Note that the parent and subtask move as a single unit

The task list should look similar to the image below



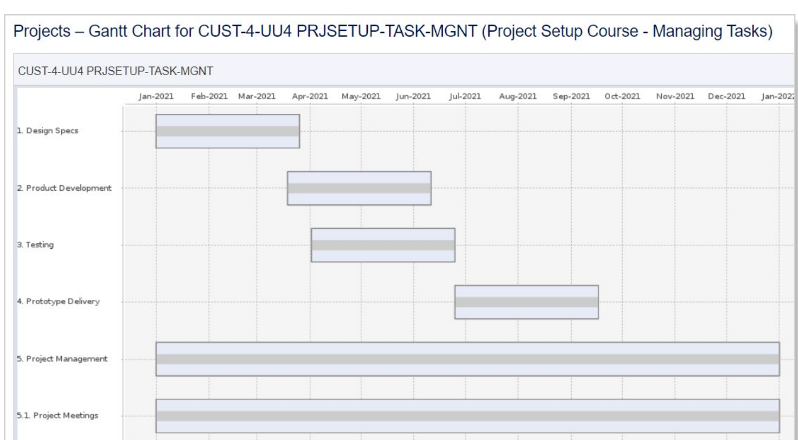
8. Update the Task Hours Budget, Duration, and Alerts
    a. Click on the Search tab to review the options
    b. In the COLUMN OPTIONS section check **Alerts**, **Duration** and **Hours Budget**
    c. Save the criteria for future use.
        i. Click the Save Criteria button
        ii. In the Save as field, type 'Task Setup List'
        iii. Click Save
    d. Click on the **List tab** to run the task list
    e. Use the **Edit All icon** to edit all tasks simultaneously
    f. Update **Tasks 1 – 4** as follows:
        i. **Duration** fields: 60 hours each
        ii. **Hours Budget** fields: 500 hours each
        iii. **Alert** fields: enable alerts
    g. Click on **Save**

h. On the left-side menu click on **Reports/Charts** and review the Status Report.
    i. Note the Project Metrics section that tallies the task budget hours.

9. Modify Task Predecessors/Successors:
    a. Return to the Tasks > List > List
    b. On task row **2. Product Development** use the **Manage Predecessors icon** to create a dependency to task 1
    c. In the TASK field: choose Task **1. Design Specs**
    d. In the TYPE field, choose **Finish to Start**
    e. In the LAG field: change to **-5** days to create a ‘5 day lead’ relationship
    f. Click **Save**
    g. Navigate back to the left-side dashboard
    h. Repeat these steps to create the dependencies for task 3 and 4 as follows
        i. On **Task 3. Testing** create a predecessor to **Task 2. Product Development** with a **Start to Start** Type of dependency with a 10 lag
        ii. On **Task 4. Prototype Delivery** create a predecessor to **Task 3. Testing** with a **Finish to Start** Type of dependency with 0 lag days
    i. Click **Save**

Part 2: Review the Task Setup in Reports/Charts
1. On the left-side menu navigate to **Reports/Charts**
2. Open **Status Report** and note the **Project Metrics** section shows the updated Hours form the tasks in the previous steps
3. Open **Gantt Chart** and note the staggered task dates and the associated lead and lag days created by the predecessor/successor edits

The report should look similar to the image below



1. Hover over any of the Task Row bars to view calculated details
2. Click into any Task Row bar to navigate to that task in edit mode to make any necessary changes

Part 3: Review Other Task Menu Features

1. Click on **Export** or **Import** to view these quick options

   Note that Imports/Exports are available to non-admin users at this level

2. Click on **Copy**

   Note this option allows you to copy the task list from other projects

3. Click on **MS Project**

   Search the Help Docs for *MS Project* to review details on how Unanet can interface with MS Project

4. Click on **Dependencies** to view all tasks along with their associated predecessors and successors in a list view

Check your understanding

The Project Profile must have the project management level field checked to manage at task level.

a) True
b) False

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

APPENDIX A: Check Your Understanding Answer Key

Lesson 1: Project and Task Settings

If you have tasks that need to have different Project Administrators, such as different approvers for timesheets and expenses, you will need to elevate those tasks to be projects.

a) True
b) False

To help control the 'Time' constraint of a project, what flag in the Budget tab can be turned on?

Enforce Project/Task Dates

Lesson 2: Create People Assignments

What is one way to create People Assignments?

a) Using the People Plan Menu and select the Assign Plans option
b) Using the Assign button from a people planner grid
c) Using the Forecast Dashboard features
d) Using an Import
e) All of the above

Lesson 3: Task Setup

The Project Profile must have the project management level field checked to manage at task level.

a) True
b) False

Glossary

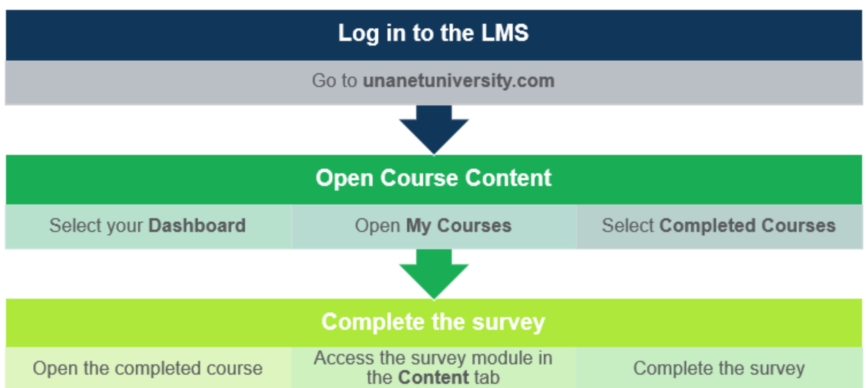
Unanet GovCon Glossary of Terms

NEXT STEPS

Completion Certificate and Course Survey

When the course has finished, Unanet University staff will mark the attendance in the Learning Management System (LMS.) This marking is percentage based and may be prorated if a participant was absent for any period of time during the course.
The LMS will generate a completion certificate (including **CPE credits**, where applicable) which will be available to the participant under their Transcript section of the LMS.
We appreciate your feedback on our courses and encourage you to complete the course survey.

A completed survey is REQUIRED to receive a certificate of completion and CPE credits.

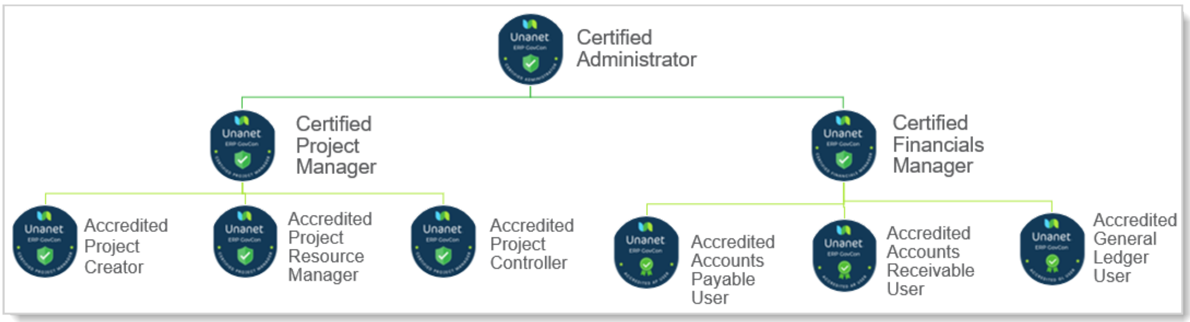


Self-Directed Learning (SDL) Courses

In addition to eLearning and instructor-led training, Unanet University also offers self-directed learning options that enable learners to complete courses at their own pace. Completion of SDL courses can prepare you to successfully attain Unanet accreditations and certifications. Available SDL courses can be located in the LMS Store by selecting the "_Self-Directed Learning" filter.

Certification Options

Unanet University offers a growing catalog of certification options ranging from end user accreditations to manager and administrator certifications. Each certification option requires a passing score on an assessment, which can be accessed once with or without completion of its prerequisite course(s). Learners may complete a single assessment to earn a single certification or complete multiple assessments to earn a comprehensive certification. The assessments are timed, "open book" exams and include a guide to the topics that will be assessed. For each assessment, learners will be given one free opportunity to pass; if unable to pass the first attempt, learners will need to complete the prerequisite ILT or SDL course(s) before attempting the assessment again.



All-Access Learning Pass

The All-Access Learning Pass provides customers and partners FREE unlimited access to live or self-paced training. The annual subscription includes:

- Unlimited access for all employees of the company
- Enrollment in all Unanet University instructor-led or self-directed courses*
- CPE credits for all instructor-led courses
- Access to all new courses without an additional fee
- Immediate access to all updated courses to include new features and functionality
- 24x7 access to on-demand microlearning online training content

*Private training events are 50% off the regular price