Unanet University

UNANET GOVCON:

MANAGING PROJECT RESOURCES

PARTICIPANT GUIDE

October 11, 2021

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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 article 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 "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 project plans and budgets using planning grids, monitor project progress, create one-button reports to analyze key project metrics that support a more efficient management of the project management lifecycle.

Objectives

After this session for **Managing Project Resources**, participants will be able to:

- Identify resources by skill type and expected utilization
- Create plans and budgets for labor, travel, and ODCs
- Monitor project and task alerts, and use notes to monitor project progress
- Approve projects and review Estimate To Completion (ETC) values on user timesheets
- Create and modify the report criteria to review performance
- Reforecast future resource allocation

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.

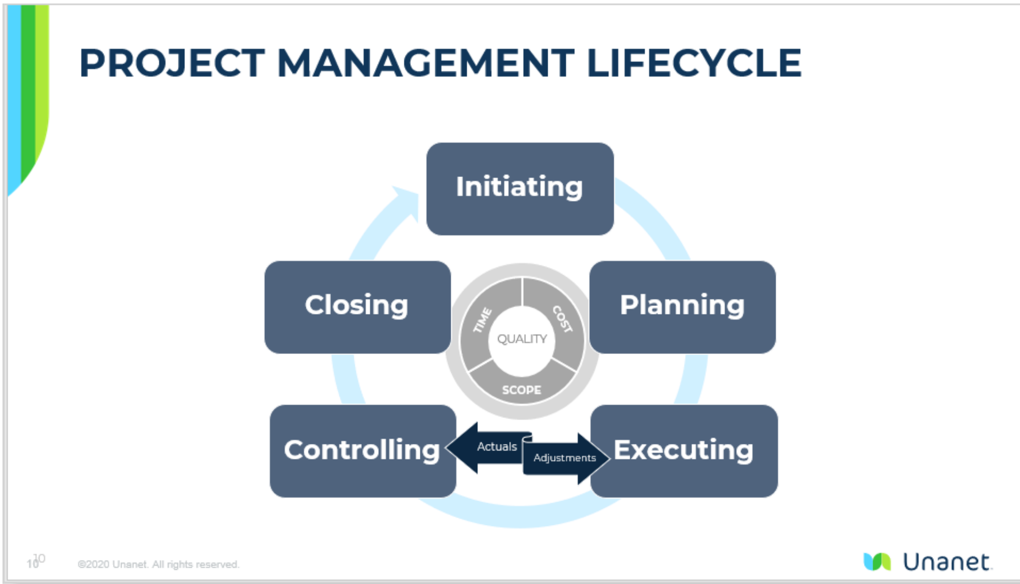
	Unanet Role	Name	Login Name	Password
Project Manager	Project Lead, Resource Planner, Resource Assigner, Manager	Gus Lead	**glead**	**welcome**

MyCo Narrative

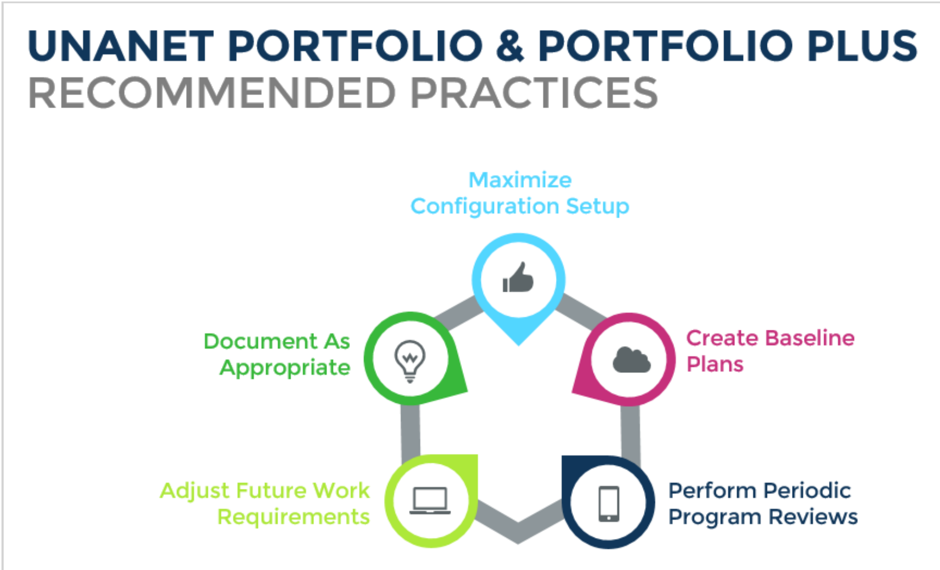
MyCo is a growing company with just under over 30 employees and a small number of sub-contractors. They have around 20 project they are working, in both the Government Contractor (GovCon) and Commercial spaces. Their contracts include time and materials, fixed price, and cost plus.

Gus Lead: Gus is the Project Manager of several project; 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



LESSON 1: IDENTIFYING RESOURCES

Learning Objectives

Identify resources by skill type and expected utilization

- Locate users that have a certain skill and/or proficiency
- Identify availability for users not planned on other projects

Planning Phase

While there are many ways to set up a plan, this course offers a variety of proven effective planning methodologies and key reports that provide an analytical view of the project plans in place.

Demo 1.1 – Review People Reports

Instructor is logged in as the Gus Lead. His relevant roles include Manager and Project Lead. Your student site has already been updated.

Demo Highlights:

- Log in as glead and review preferences > roles
  - Discuss Project Lead and Manager
- Review people reports that show users by skill and availability.

Using Reports to Identify Skills

There are many employees at MYCO with a myriad of skills. Unanet offers several ways to identify users with certain skills as well as the availability of users based on their plans, assignments and/or actual work on projects.

The Business Development team would like to submit a proposal for a high value contract. The team needs know if there are any employees or subcontractors that possess Jedi Knight level Python Programmer Skills.

Activity 1.2 – People Skills Profile Report

Locate users that have the Jedi Knight level Python Programmer skill. Log in as Gus Lead. (userid: glead password: welcome)

Activity Steps

1. Navigate to **Reports > Dashboard**
2. Navigate to **People Reports (Time & Expense Only) Section > Detail Reports Skills Profile**

3. Run **Saved Report** > **MPR-Activity 1.2 Skills Profile Report**

   If you prefer, use configure the report with these criteria

   - REPORT ON: change to ‘All People I can see’
   - PERSON filter: in ORG CODE > filter for GS-SE
   - SKILLS: filter for %PYTHON and select Programming-Python (Jedi Knight > 20 years)
   - REPORTING OPTIONS: choose ‘Sort by Person, Skill Type, Skill
4. Run the Report
5. Note which users meet the required skill(s)

Using Reports to Identify Resource Availability

Now that the BD team knows who is qualified to perform the work, they need to find out if these users are ‘available’ as in not planned on another billable project.

Activity 1.3 – Resource Allocation Report

Identify which of the Jedi Knight Python Programmers are available to be proposed on this new contract. Remain logged in as Gus Lead. (userid: glead password: welcome)

Activity Steps

1. Navigate to **Reports > Saved**
2. Scroll down to the My Reports and choose one of the two Resource Allocation Reports
   - **MPR-Activity 1.3 Resource Availability (Chart)**
   - **MPR-Activity 1.3 Resource Availability (Detail)**
3. Use the edit icon to review the criteria. On each report, the relevant criteria includes the following settings:
   - **SKILLS**: is limited to the one skill and level needed for the proposal
   - **PROJECT STATUS:** filtered on Pipeline Projects and Open Projects
   - **REPORTING OPTIONS**: is set to Include Plans Only
   - **Booked % Color:** is set to show users under an 90% utilization in Red, suggesting that they may be ‘available’ for the proposal
4. Run the report and review the results.

Note: The red bars represent users that meet the filter criteria with less than 90% planned on a proposal or open project.

5. Note which users are available based on their planned work
6. On the Detail Report, click into any person's name to view the utilization for all increments to view which project and labor category they are planned to work.
7. On the Chart Report, click into any bar to view the utilization for any one increment and further click into a user's name to view more details.

Check your understanding

Which Unanet report(s) can help determine 'who is available' to be planned on a project?

a) Resource Allocation Reports
b) Schedule Details Reports
c) People Periodic Performance Report

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

LESSON 2: PEOPLE AND EXPENSE PLANS

Learning Objectives

Create plans and budgets for labor, travel, and ODCs

- Review the license and relevant roles to create plans
- Use grids to create a project plan
- Review plans using list view
- Create people assignments from plans
- Create expense plans from the grid

Reforecast future resource allocation

Planning in Unanet

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

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

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

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

Grid Planning

There are a number of ways to plan resources on projects using the tools provided by Unanet. This section focuses on one method for planning resources: the grid planner. The grid planner is an Excel-like method to select resources on projects and associate

those resource with costs and bill amounts. Reports can be run against planned resources to view total costs and bill amount. Customers use the grid planner for bid and proposal work, budgeting, and project forecasting.
Grid planners are available directly in a project's menu where you can plan users on a single project. There is also a grid planner available through the Forecast menu that allows project planning for many users or expenses on many projects at the same time.

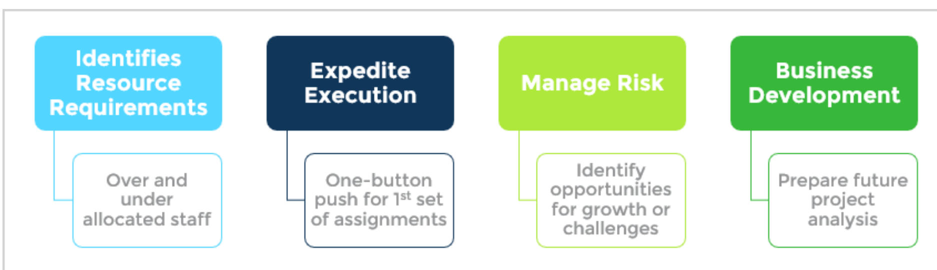
Forecast Menu

This dashboard is unique in that it can create a grid for many people and many projects on one screen. This type of grid provides increased visibility not typically available on one project.

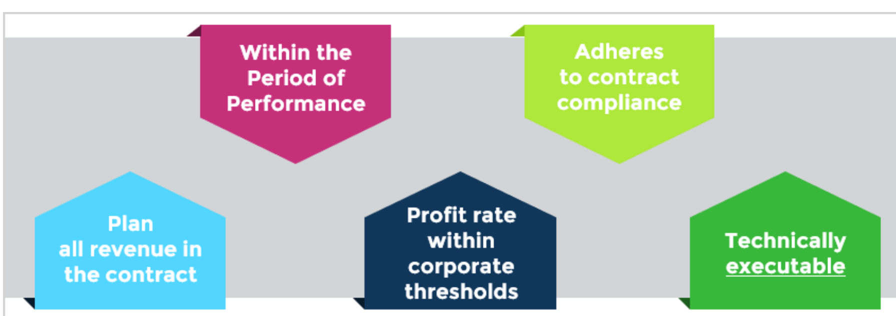
Project Menu

This dashboard is unique in that it includes all the profile and menu settings available for a single project. While this menu provides increased insight for features like multiple plan sets, it does limit you ability to plan or budget users to multiple projects.

Benefits of Planning



Elements of a Valid Plan



Using Grids to Create a Project Plan

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

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

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

Recommendations for creating a People Planning Grid

Plan View: Plan at Project or Task level. If the project has "Manage at Task level" enforced, and you intend to create assignments from plans, choose to plan at Task level.

Planning Periods: These are the increments of time for each plan.
NOTE: Recommended practice is to choose a time period that best suits your planning periods and use this same increment consistently for all planning grids on all projects. Initial recommendation is to use your timesheet period as a planning increment as this one provides the most flexibility with reports and management efforts.

Not adhering to this recommendation may result in a gray grid. A gray grid reflects a view only cell. Plans can only be edited in the same increment as created.

Number of Periods: This determines how many planning increments will be in the grid. Recommendation is to use the entire period that you intend to plan using the project start/end dates.

Start Date: The date for the first increment

Budget in: This option should be Hours or Utilization. Utilization rate is calculated based on default Business Week. (EX: Using 1 = 100% capacity, using .5 = 50% capacity)

People to plan: Filter by last name or Person Organization code, default labor category, location, and/or skills.

Display Options: These are helpful to display information such as dates and budgets from the project or task on the grid.

Tips for adding and editing people plans in a planning grid

There are several double-click features to quickly update many planning periods at the same time.

For example, use a double click on each of these areas in the grid:

1) On the Person's name: this opens an edit screen to update all planning periods for this one person
2) On one single planning cell: this opens the edit screen to update this one increment for this one person
3) Double clicking into one column header edits all users in the grid for that one increment
4) Finally, double clicking on the top left corner of a grid opens the edit screen for all users and all increments in the entire grid

The grid entries have many features. Some include task selection, hours or utilization, which bill rates and cost rates to use, swapping plans to a different person and a myriad of fields that can be derived by the system based on your project setup. While there are many features in the grid, below are some of the most common project management recommendations.

Bill Rate

Recommendation is to allow the bill rates to derive directly from the project level labor category setup. This ensures that any escalation rates are used in the appropriate period.

Cost Rate

Recommendation is to have the cost rate derive from the person's profile. Again, this ensures that any escalation rates are used in the appropriate period. However, it may be logical to override the cost rate if planning records are using either TBD resource or maybe a fixed cost rate for a subcontractor.

Cost Element

The cost element can be derived from the person's profile rate information. It is recommended to allow the system to derive the cost element as this field is time bound on the cost rate record in the person's profile and would always provide the correct cost rate based on the date.

Labor Category
It is highly recommended to select the desired labor category for the user to ensure it is correct. Allowing the system to derive the default will likely result in the wrong result and person defaults can be changed by an administrator thus systematically change the labor category and bill rate on any project where this user's person default was used in a plan and/or assignment. For TM projects, this would result in inaccurate billing. In projects with other billing types, this would change the nature of which labor category was necessary to perform the work. Therefore, it is recommended to specifically select the labor category that represents the work needed to be performed. This ensures that your people plan will have the correct labor category and bill rate.

Shifting Resources on the Grid

Once plans and assignments have been created, they can be moved to a different time period. The steps below outline how to shift plans, but the same steps also apply to shifting assignments.

1. Ensure that your grid has enough periods in the grid to support how many increments that you want to move your plans
2. From the plan tab, check the box next to the user's name you would like to shift
3. Enter the number of periods to shift.
4. Click the Shift Left or Shift Right button depending on the direction you would like to move the plans.

NOTE: You cannot shift plans outside of the time periods displayed in the planning grid.

Swapping Resources on the Grid

The swapping features is a quick way to move all components of a plan from one user to another. Swapping is very useful when the original plans were created with 'place holder' resources, also known as the TBD Users and as the project plan is being executed the plans can be swapped to a named resource. Swapping can also be done on known resources if you need to quickly move one user's plans over to a different user.

In order to swap resources on a project, you need to make sure you have selected the resource that currently has the plan you wish to swap, as well as the resource you wish to swap the plan to.

The other tip on swapping is to ensure that the user you are swapping to does not already have a plan in any of the increments you are trying to give that user. This is because you cannot have overlapping plans for a user on the same project or task in the same increment of time. If any user on the project/task has an existing plan, their name will not appear when you use the people selector in your effort to do the 'swap'.

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

Demo 2.1 – People Planning Grid

Instructor is logged in as the Gus Lead. His relevant role is Resource Planner.

Demo Highlights:
Review key features of the people planner grid to include:

- Setting up the grid, saving the criteria
- Discuss critical decision to choose the increment
- Demonstrate the four ways to add plans

Activity 2.2 – Grid Planning at the Project Level

Create a project plan without tasks using the grid functionality. Remain logged in as Gus Lead. (userid: glead password: welcome)

Activity Steps

Part 1: Select project

1. Navigate to the Project Dashboard (Contracts > Project > Dashboard)
2. On the left side menu, under quick links, click into Managed Projects
3. Edit project: **CUST-4-UU4 RSMGNT-PLANNING-PRJ-LVL**
4. On the left-side dashboard, click into **People Plans**

Part 2: Create a planning grid

1. Under People Plans, click on **Plan with Grid**
2. Run the Saved Criteria > **MPR-Activity 2.2 Planning Grid at Project Level >** review the criteria > click on **Plan**
   OR create a filter, as follows:
   PLAN FOR Section:
   PLAN VIEW: choose **Project**
   PLANNING PERIOD: Calendar Months, 12 increments and Start Date of 1/1/2021
   BUDGET IN: select **Hours**
   PEOPLE TO PLAN Section:
   PERSON: filter for ORG Code = **GS** and LAST NAME = **UU USER 00**
   Select UU User00, Amara
   UU User00, Jack
   UU User00, Milo
   GRID CONTENTS Section:
   Display Options: check **Include Subtotals**
   check **Show Project/Task Dates**
   check **Show Project/Task Budget Hours**
3. Click **Plan** tab to view the Grid

Part 3: Use the skills learned in class to create people plans for the following users:

1. Plan **UU User00, Amara**
    a. Double click on the row for Amara
    b. In the PLAN LABOR section, check the box **Enable Budget field for updates** and enter **80** hours
    c. In the MISCELLANEOUS section > **Labor Category field,** select **UU APSTAR Business System Analyst**
    d. Click **Save** to return to the grid and review the results
2. Plan **UU User00, Jack**
    a. Double click the 1st monthly increment cell for Jack
    b. In the PLAN LABOR section enter **80** hours
    c. In the MISCELLANEOUS section > **Labor Category field,** select **UU APSTAR Business System Analyst**
    d. Click **Save** to return to the grid and review the results
3. Move Jack's hours to the right by 2 months
    a. Check the box on Jack's row
    b. Enter 2 for the Number of periods to shift selected items left or right
    c. Click the Shift Right button
4. Plan **UU User 00, Milo**
    a. Do not use the double click. Instead, simply enter **40** hours in the 1st month. This will result in the labor category deriving a result on its own.
5. Click **Save**

Activity 2.3 – Grid Planning at the Task Level

Create a project plan with tasks using the grid functionality. Remain logged in as Gus Lead. (userid: glead password: welcome)

Activity Steps

Part 1: Select project

1. Navigate to Home Dashboard (Unanet logo in top left corner)
2. On the left-side menu > My Lists and click on **–My Projects**
3. Use the pencil icon to edit **CUST-4-UU4 RSMGNT-PLANNING-TSK-LVL**
4. On the left-side dashboard, click into **People Plans**

Part 2: Create a planning grid

1. Under People Plans, click on **Plan with Grid**
2. Run the Saved Criteria > **MPR-Activity 2.3 Grid Plan at Task Level >** review the criteria > click on **Plan**

   OR

   Create a filter, as follows:

   PLAN FOR Section:
   PLAN VIEW: choose **Tasks for Many People**
   PLANNING PERIOD: Calendar Months
   12 increments
   Start Date of **1/1/2021**
   BUDGET IN: select **Hours**
   PEOPLE TO PLAN Section:
   PERSON: filter for ORG Code = **GS** and LAST NAME = **UU USER 00**
   Select UU User00, Amara
   UU User00, Jack
   UU User00, Milo
   GRID CONTENTS Section:
   Display Options: check **Include Subtotals**
   check **Show Project/Task Dates**
   check **Show Project/Task Budget Hours**

   Click **Save Criteria** and save your Grid for later

Part 3: Use the skills learned in class to create people plans for the following users:

1. Plan **UU User00, Amara** on Task: **2. Design Specs**
    a. Located the task section for '**2. Design Specs**'
    b. Double click on the row for Amara
    c. In the PLAN LABOR section, check the box **Enable Budget field for updates** and enter **80** hours
    d. In the MISCELLANEOUS section > **Labor Category field,** select **UU APSTAR Business System Analyst**
    e. Click **Save** to return to the grid and review the results
2. Plan **UU User00, Jack** on Task **3. Product Development**
    a. Located the task section for '**3. Product Development**'
    b. Double click the 1st monthly increment cell for Jack
    c. In the PLAN LABOR section enter **80** hours
    d. In the MISCELLANEOUS section > **Labor Category field,** select **UU APSTAR Business System Analyst**
    e. Click **Save** to return to the grid and review the results
3. Move Jack's hours to the right by 2 months
    a. Check the box on Jack's row
    b. Enter 2 for the Number of periods to shift selected items left or right
    c. Click the Shift Right button
4. Plan **UU User 00, Milo** on Task **1. Project Management**
    a. Located the task section for '**1. Project Management'**
    b. Do not use the double click. Instead, simply enter **40** hours in the 1st month. This will result in the labor category deriving a result on its own.
5. Click **Save**

Project People Plan List View

When setting up plans on the grid planner, it is easy to create many plans quickly while the Project People Plan List View is an easy way to view the details in a single row.

The People Plan List View has a unique feature that uses font color to indicate where the data was obtained in a people plan record.

- Plan data in black font indicates an explicit selection and ensures that is the information that will be used to calculate costs and revenue
- Plan data in gray font indicates the system has derived a value based on setup and rules within the system. Derived data can change at any point if the setup for the data is modified.

The recommendation is to ***explicitly select the labor category field*** and allow the bill rates to be derived by the labor category setup at the project level. Not doing so will likely result in the wrong labor category and rate being derived by the system.

Demo 2.4 – Review Project People Plan List View and Creating People Assignments from Plan

Instructor is logged in as the Gus Lead. His relevant role is Resource Planner.

Demo Highlights:

Part 1 Review People Plan List

- Review the **People Plans List > List**
- Discuss the derived versus explicitly selected fields

Part 2 (Understanding the Derived Default)

- Demonstrate how the system derives a default labor category

Part 3 Create People Assignments from People Plans

- Review Project Management Level settings on Project Profile
- Create Project Level Assignments using the Grid
- Use the Assign Plans feature to view and edit plans at task level

Activity 2.5 – Review the Plans Using the List View

The Plans List View is an easy way to quickly identify anomalies in the underlying data. Use the pre-staged data for this activity to view the details of the planned records for each user on a single page. Remain logged in as Gus Lead. (userid: glead password: welcome)

Activity Steps

1. Navigate back to the Project List
2. Edit Project: **CUST-4-UU4 RSMGNT-PLANNING-LIST-VIEW**
3. On the left-side dashboard, navigate to **People Plans > List > List**
4. Take a few minutes to review the list
5. Notice the following tells in the data
    a. The labor category for Amara and Jack are ‘black’. This indicates that the labor category was specifically selected in the plan
    b. The labor category for **Milo UU User00** is gray, indicating that labor category was not specifically selected and the system derived the labor category ‘**UU-00-CHANGE LCAT’**.
    c. The bill rates are all gray, indicating that rates were derived by the project settings to use the labor category rate.

Since Milo’s labor category is incorrect, this will result in inaccurate reporting and billing since the project has a Time and Material Bill Rate. Available options to correct the mistake include:

- Edit each planning record manually

- Create a planning grid for the increments and change the labor category for all records on the grid
- Export the plans, change the labor category to **UU-APSTAR-System Engineer** and import the plans

Reflection from Previous Lesson 2 Activities

Milo is supposed to be planned as a UU APSTAR System Engineer at a bill rate of $95.00 per billable hour.

However, in the prior activities, you may recall that we added 40 hours for Milo and did not choose a labor category. The result is that the system will try and derive a default. The system will first try to use his person profile 'default' labor category. If this labor category is available for the project level labor categories, it will derive to his person profile labor category. Otherwise, it will use the first labor category listed in the project level labor categories.

As mentioned in class, with regards to the labor category field, the system will likely always derive the incorrect one when the project is set up with project-level labor categories allowed on the project and the project's time tab set to always require a labor category.

Thus, we recommended to ***always*** select the Labor Category on all People Plans and People Assignments.

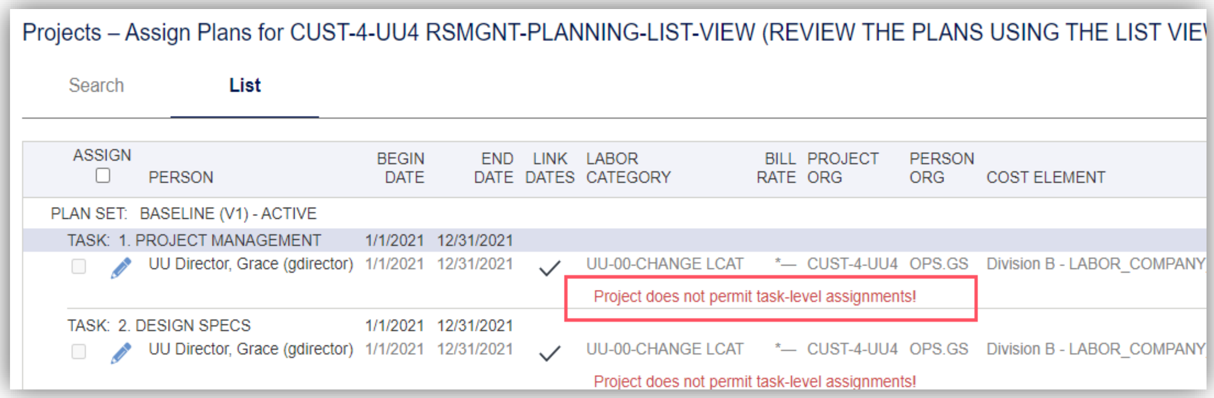
People Assignments Via Plans

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. Practicing these recommended settings can minimize end-user errors and support the project management team with controlling the schedule, cost, and scope of a contract.

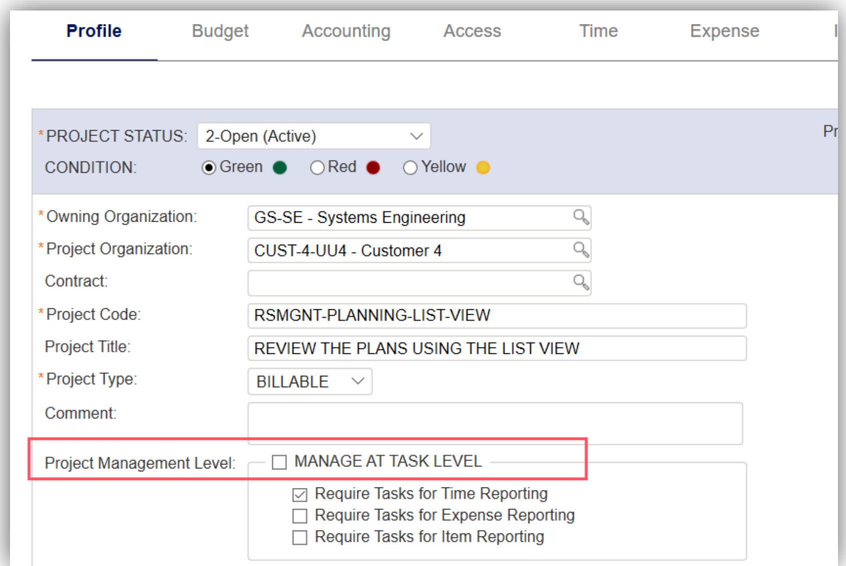
It is important to understand that People Plans and People Assignments are separate tables in the system.

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

Unanet recommends creating the people assignments by using the People Plans feature to 'assign' directly from the plans. However, it is important to understand that the assignments will validate against the setting for 'project management level'. If the plans were created without tasks and the Project Profile has the Manage at Task Level enabled, the system will produce a validation error. See example below.:



Therefore, it is prudent to be aware of this setting before deciding if your plans will be at the project or task level and if you will use the plans to create the initial set of assignments.

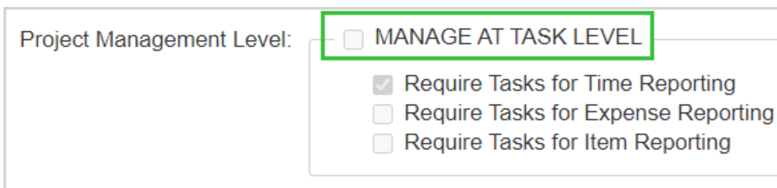


Activity 2.6 – Create People Assignments from Plans

Create people assignments using the project plans as the source of the assignment information. Remain logged in as Gus Lead. (userid: glead password: welcome)

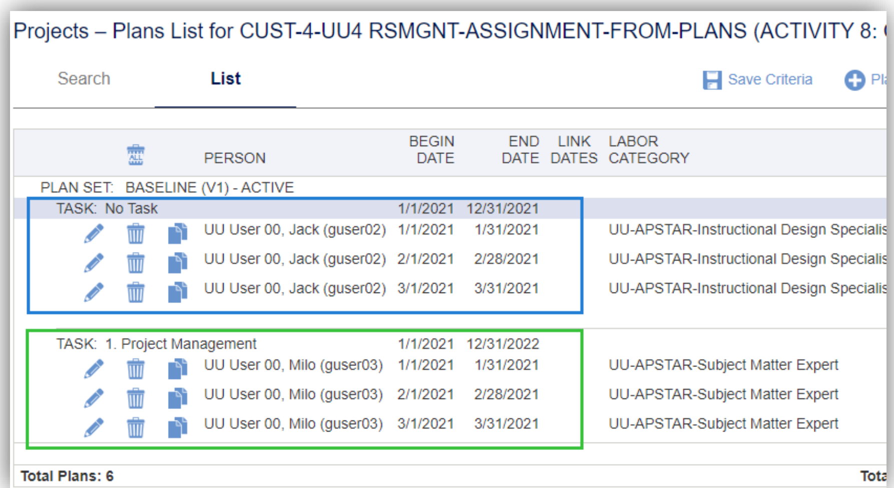
Activity Steps

1. Navigate back to the Project List
2. Edit Project: **CUST-4-UU4 RSMGNT-ASSIGNMENTS-FROM-PLANS**
3. On the Project Profile tab, note that the assignments will be validated against project assignments not specific task assignments.



4. On the left-side dashboard, navigate to **People Plans > List > List**

5. Notice that there are a few plan records. One set for Jack that have no Task and Milo has a few records planned for Task 1. Project Management

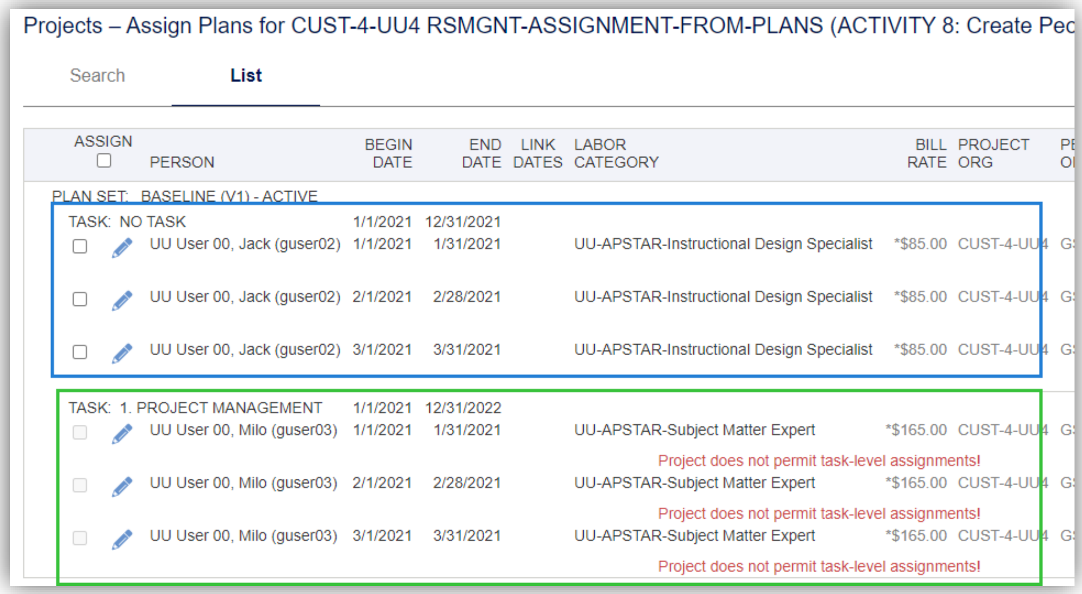


6. On the left-side dashboard, navigate to **People Plans > Assign Plans**
7. Click on the **List** tab to push all plan over to the Assignment Edit Screen

There will be two actions to review:

- Plans that were created at the Project Level have been copied over to the Assignment edit screen and can be selected to be saved as People Assignments.

- However, plans that were created at the Task Level have not copied over to the Assignment table and the Assign flag is disabled, and the system provides you a validation report indicating the project does not allow for Task Level Assignments.



8. Use the pencil icon to edit the three plan records for Milo and change the task selector to none and save the update.

All plans should be at the Project Level at this point.

9. Click the Assign check box at the top of the list to select all plans
10. Click **Save** to copy these plans over to the people assignment table.
11. Verify that People Assignments were created
    a. Navigate to **People Assignments > List > List tab**

Expense Plans and Expense Budgets

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

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

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

Demo 2.7 – Review Expense Plans and Budgets

Instructor is logged in as the Gus Lead. His relevant role is Resource Planner.

Demo Highlights:

- Review Project: **CUST-4-UU4 RSMGNT-BUDGETS-FROM-PLANS**
- Review Expense Plans > List > List
  - Note the increment chosen for the existing plans
- Review Expense Plans > Plan with Grid
  - Use Saved List and review the planning increment
  - Discuss the recommendation to limit expense types
- Run the grid
  - Iterate the values on the plan need to be direct cost rates
  - Use the Budget button to create expense budgets

Activity 2.8 – Create Expense Plans and Budgets Via the Grid

Add expense plan and use the expense plan to create the expense budget.
Remain logged in as Gus Lead. (userid: glead password: welcome)

Activity Steps

Part 1: Select a project

1. Navigate back to the Project List
2. Edit Project: **CUST-4-UU4 RSMGNT-BUDGETS-FROM-PLANS**

Part 2: Create an expense planning grid

1. On the Left Side Dashboard, click into **Expense Plans**
2. Click on **Plan with Grid**
3. Run the Saved Criteria > **MPR-Activity 2.8 Grid Plan for Expenses >** review the criteria > click on **Plan**
   OR

   Create a filter, as follows:
   - **PLAN FOR** Section:
     - **PLAN VIEW**: choose **Project**
     - **PLANNING PERIOD:** Calendar Quarters
       4 increments
       Start Date of January 1, of current year
4. Click **Save Criteria** and save your Grid for later
5. Click **Plan** tab to view the Grid

Part 3: Plan expenses for each increment in grid

1. Finish expense plan with:

   Added for you:

   Airfare: $10,000 in each quarter
   Travel General: $40,000 in each quarter

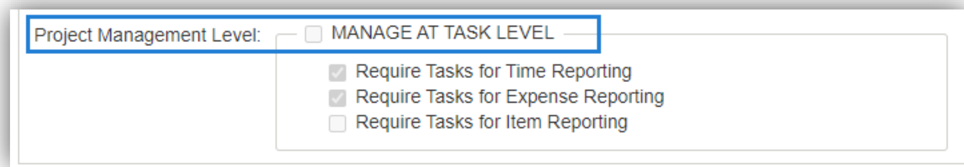
   To be completed:

   Add row for **Supplies/ODCs**: **$1,000 in the first quarter**
   Use the **shift right** button to move the Supplies/ODCs over to the fourth quarter

2. Click **Save**
3. Click on the **Summary** tab to view the list of all expenses in a table format
   a. On the Summarize By section, click each of the radio buttons to view summarized expenses by task, expense type or both

Part 4: Create expense budgets using the expense plans

1. On the Project Profile tab, note that the assignments will be validated against project budgets not specific tasks



2. On the left-side dashboard, navigate to **Expense Plans > Budget Plans**
3. Click the **List** tab to view the available expense plans that can be used to generate the expense budgets
4. Navigate to the top-left corner of the list, and check the box to select all plans
5. Click **Save**
6. Verify that Expense Budget were created
    a. Navigate to **Expense Budgets > List > List**

Check your understanding

Which of the following help define a Valid Plan?

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

It is recommended to select the labor category field and allow the bill rates to be derived by the labor category setup at the project level. What may not doing so likely result in?

Which values are entered on the expense budgeter grid in Unanet?

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

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

LESSON 3: PROJECT ALERTS & NOTES

Learning Objectives

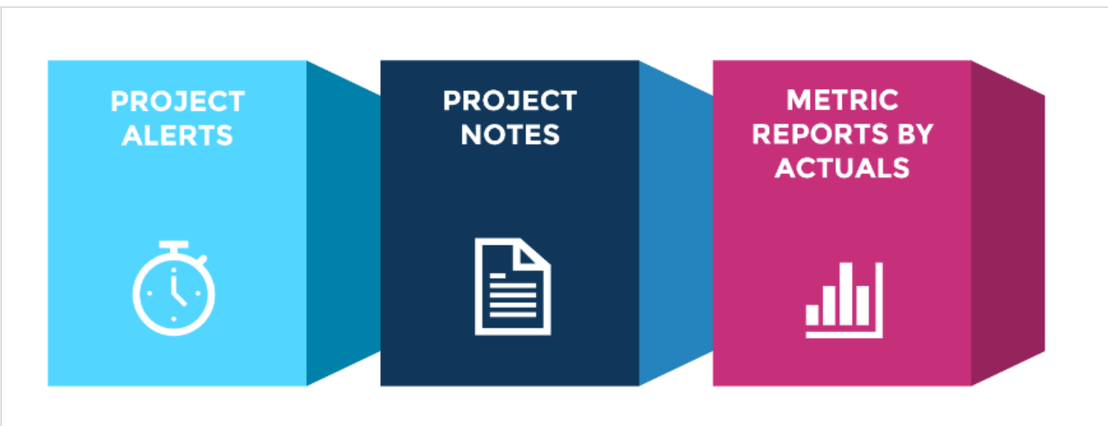
Monitor project and task alerts, and use notes to monitor project progress

Executing Phase

During this phase, ensuring that the contract requirements are being performed within the triple constraints is critical. There are many tools available to help with this phase, including the use of project notes, alerts at the project and tasks, and the setup on the project and tasks will help with expediting timesheets and expenses.

There are also a host of standard reports that the management team may want to run while the actuals are being generated during the timesheet period. Below are a few topics that support the execution phase of the project's lifecycle.

Recommended Practice



Project Alerts & Notes

The system can send emails and broadcast messages on a user's dashboard when the project manager sets up project alerts that align with the needs of the project.

Project Alerts are configured on a project by the project manager role; however, a project lead user can update a task setting to enable the project alert settings for one or many tasks. This type of oversight assists in managing the overall project.

Project notes are a powerful way to track and store documentation and collaboration by your team members. Any user with access to the project can create a project note to document and notify others about potential risks, or events that could impact the success of the project.

While any user with access to the project through a role and organization access can create a note. However, there is an option on a project note to limit access by role, if selected.

Metric Reports on Actuals

There may be a need to review one of the reports between periodic reviews. As Unanet is a real-time system that provides immediate insight to time and expense entries, this makes it relatively easy to gain immediate insight on your project. Most of the standard reports allow for reporting on actuals through a given date. Below is a short list of more commonly used reports during this executing phase.

Project Performance Chart

This chart can be run to provide a forecast of hours, cost or revenue information in an incremental chart format. The chart can be run showing Budget (aka Assignment), Plan and Actuals information for each period (bar format), and can also optionally include cumulative values for each type of time (line format).

People Resource Allocation Chart

This chart can be run to provide information regarding how booked your resources are in terms of either plans, assignments or actuals (and can optionally add requested leave on top) in a Weekly, Monthly or Quarterly bar chart format. The user can configure the allocation colors and percentiles. Each bar in the chart can represent the number of people whose allocation falls within the user-defined percentile for the period.

Timesheet Status Pie Chart

This chart can be run to provide a summary of timesheets in various statuses in a pie chart format. It is common to have two versions of this report on a manager's dashboard. One configured to show the current timesheet period and a second one to show the prior period.

All standard reports that contain the word CHART in the title can be saved to a user's dashboard. This could prove very useful to the project management team to have an easily accessible way to monitor key metrics in the system. All charts also have drill down features to more detailed reports.

Project Expense Details Report

This report provides a detailed view of expenses charged to a project or project organization. It may be helpful to see which users are still working on an expense report during the course of executing the project.

The **Include non-completed Expense Reports** flag is available on any report that includes expense data. These would include user's expense reports that are still in the IN USE status. This is a very helpful tip during the execution and management phase for the project team.

Demo 3.1 – Review Project Alerts & Notes Menus

Review project alerts dashboard, features to manage alerts, project status report and adding/updating project notes. Remain logged in as Gus Lead. (userid: glead password: welcome)

Demo Highlights:

- Review Project Alert Dashboard
- Demonstrate how to Read/Unread alerts
- Review an alert and analyze the Project Status Report
- Click through to the Project and create a Project Note

Activity 3.2 – Using Project Alerts

Use notes and alerts to help monitor the project as specific thresholds are reached as the project executes. Remain logged in as Gus Lead. (userid: glead password: welcome)

Activity Steps

1. Navigate to the Home dashboard
2. Click into the banner message "You have unread Project Performance Alerts"
3. Review the list of messages
4. Click into one of the messages to view the **Project Status Report**
5. In the Project Status Report, review the **% elapsed time and % complete**
6. Click into the project using the blue hyperlink
7. Navigate back to **Project Alerts**
8. On one of the alerts use the mark read icon to mark the alert as **READ**
9. Notice that the alert moves to the **PREVIOUSLY READ ALERTS** section
10. In the **PREVIOUSLY READ ALERTS** section, click the delete icon to delete the alert

Activity 3.3 – Using Project Notes

As the Project Lead on a billable project team, Gus periodically records project notes to be used later when the team is assessing possible risks or documenting the activities on the project. Remain logged in as Gus Lead. (userid: glead password: welcome)

Activity Steps

1. Edit Project: **CUST-4-UU4 RSMGNT-C01-INNOVATION-L**
2. On the left-side dashboard, click on **Notes**
3. Use the **add** button to add a new Project Note, as follows:

NOTE TITLE:	Funding Issue
NOTE DESCRIPTION:	Need to discuss
NOTE TYPE:	RISK
NOTE STATUS:	1. NEW
DUE DATE:	Two days from now
ASSIGNEE:	Filter for Fay Contracts
NOTE ACCESS Section:	Update the settings to only allow the Project Lead to view the note
E-MAIL NOTE:	In your real Unanet, consider notifying the appropriate user. For this activity, ignore this option.

4. Click Save

Check your understanding

Project notes can be filtered by type and status and assigned to a specific user with due dates.

a) True
b) False

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

LESSON 4: PROJECT APPROVALS & ESTIMATES TO COMPLETION (ETC)

Learning Objectives

Approve projects and review Estimate To Completion (ETC) values on user timesheets

- Navigate the approval process
- Run the ETC Wizard
- Run the Project Schedule Details Report

Project Approvals

There are many cases where you will want your time and expenses approved at the project level. To do this you need to establish a Project Approver for applicable projects. The Project Approver can approve time, expenses, or both.

Once you have the project set for approvals, then the designated Project Approver will see an approval queue on their dashboard when entries have been submitted for approval. Project Approvers can be flagged to receive the document before the Manager Approval Group via a setting on the project.

Tour 4.1 – Project Approvals

Navigate the approval process for project approvals. Remain logged in as Gus Lead. (userid: glead password: welcome)

Tour Highlights

1. Navigate the approval process for project approvals
2. Note how to ensure project approvers approve first
3. Discuss alternates and dashboard settings for approvals

Estimates To Completion (ETC)

Unanet offers several methods to update Estimate to Complete (ETC) values. For example, users can add ETC data on their timesheet, managers (with the Resource Assigner role) can update the user's assignment and the manager (Project Lead or Project Manager role) can update the ETC values directly on the project and task.

In this course, we will show how a Project Approver can review the ETC values when entered on the user's timesheet. This information will be valuable to help determine if resource assignments need to be adjusted for future periods in the project.

Use the activity below to practice how to conduct a project approval and view the ETC data entered by the timesheet users.

Tour 4.2 – Review the ETC Wizard

Conduct a project approval and view the ETC data entered by timesheet users. Remain logged in as Gus Lead. (userid: glead password: welcome)

Tour Highlights

1. Locate and discuss User ETC fields (timesheets and ETC menu)
2. Locate and discuss Project/Task ETC fields, Wizard

Tour 4.3 – Review Project Schedule Details Report

Run the Project Schedule Details Report to review ETC entries. Remain logged in as Gus Lead. (userid: glead password: welcome)

Tour Highlights

1. Run and analyze Project Schedule Details Report

Check your understanding

The ETC Wizard shows updates by the project team at the project/task level as well as entries by the timesheet users

a) True
b) False

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

LESSON 5: MONITOR & CONTROL PHASE

Learning Objectives

Create and modify the report criteria to review performance

- Review the Project Periodic Performance Report
- Review the Project Forecast Summary Report
- Review the People Periodic Resource Allocation Report

Reforecast future resource allocation

- Adjust a project's people assignment using Forecast People Assigner grid

Introduction

In the project life cycle, the project monitoring and control phase happens in tandem with the execution phase. This phase involves actively reviewing the status of your project as it proceeds, evaluating potential obstacles, and implementing necessary changes.

During this phase, organizations need to juggle several responsibilities, including keeping to the schedule, staying within budget, avoiding scope creep, and managing risk. Below are a few recommendations and suggestions for using Unanet in this phase.

Useful Reports for Reforecasting Resource Allocation

In this course, we assume that the project team does not have the Cost Rate Manager role and the system is not configured to allow a non-cost rate manager to run any of the project accounting reports With that, a project team can analyze the performance of the users actuals based on either plans or assignments and make changes to the future efforts of users and hours. Several reports can support this level of reforecasting. They include the following:

Resource Performance Reports

The **Project Periodic Performance Report** can provide a comparison of the planned, assigned and actual hours charged on a project as well as a variance between these values.

Resource Utilization Rate Reports

A **People Periodic Resource Allocation Report** can be configured to answer a variety of questions regarding how booked a person is, in terms of actual hours, assigned hours or planned hours (and can optionally consider requested leave as being booked). The output is in a period by period layout (daily, weekly, monthly or quarterly) and can be color coded to help flag those individuals that fall in a particular booked percentage range.

Labor Category Allocation

The **Project Periodic Forecast Report** can provide a forecast of hours information in a periodic layout. Using the available selection criteria, you can summarize the output by a variety of attributes (e.g., by Project, Person, Labor Category, Expense Type, etc.), the output can include key metrics such as hours and FTE information. By blending actual labor with planned labor, you can get an accurate view of your forecast based on current and forecast run rate.

Tour 5.1 – Review Performance, Forecast & Utilization Reports

Instructor is logged in as the Gus Lead. His relevant roles for this tour include Project Lead and Manager.

Tour Highlights:
Review criteria and analyze key fields for the following reports

Part 1 Project Periodic Performance Report to see variances
Part 2 Project Periodic Forecast Report to see end state
Part 3 People Periodic Resource Allocation Report to see utilization

Reforecasting Projects for Resource Allocation

During the lifecycle, projects need to be reviewed for performance against key metrics that are relevant for the project. Many times, the project is limited to the contracted schedule, scope and costs. In situations like this, if a team works more hours or less hours than originally planned, the project manager may choose to reforecast the remaining hours and move staff around to keep the project within the original boundaries of schedule/scope/cost. In this class, we focus on reforecasting a project for hours and resource utilization. Below are some of the primary methods to reforecast a project for resources and expenses.

Swapping

People Plans offer an option to move the hours for one user for another user provided the user receiving the hours does not already have a people plan with the same dates on the same project/task. This feature is commonly referred to as 'swapping'. Swapping resources can be handled on a single plan or in the grid where you can swap all hours in the grid from one user to another.

The people planner grid allows for an option to search for users with particular skills. This might be helpful if you do not know which users have the same skills as the person that currently has the hours in the plan. The fact that another user has the skills needed does not mean that user is actually available to perform the work. As such, the People Resource Allocation Report can be used to help identify which user has both the skills needed and availability based on plans or assignments on other projects.

Be aware that overlapping assignments are not allowed. If trying to swap a user's hours and the receiving user does not show as an option, the receiving user already has an existing plan for that period of time.

Shift Left/Right

Once plans and assignments have been created, they can be moved to different time periods. This is called 'Shifting Left/Right'. It is the functionality to move the contents of a row of cells X number of cells to the right or left. This is only available when using a grid view of the plan/assignment.

When the populated cell moves to a new period all values in the cell, as well as any override values associated with the cell will be moved. This feature may be helpful, for example, if you need to delay a project for one or several months and would like to shift existing entries without having to re-key them in.

The controls involved in this functionality include the leading check box on each row, the Shift Left and Shift Right buttons, as well as the Number of Periods entry field. Note that you can check the check box at the very top of the grid which acts as a toggle to check / uncheck all available check boxes in the grid.

Click Shift Left or Shift Right depending on the direction you would like to move the plans. Note that you cannot shift plans outside of the time periods displayed in the planning grid.

Revise Future Assignments

When reforecasting a project, you may decide to simply adjust hours and/or labor categories to ensure you can complete the project. The key takeaway for adjusting hours/labor categories is to only adjust the future periods as there is little need to update past assignments. This is because reports offer the criteria to show hours through a specific date and then remaining assignments. Actuals will always replace prior assignments.

Demo 5.2 – Review Methods to Reforecast Projects

Review running reports, modifying assignments, and updating projects. Logged in as Gus Lead (userid: glead password: welcome)

Demo Highlights

Focus on key reforecasting features:

Part 1 Revise Future Assignments
Part 2 Swap Assignments
Part 3 Shift Assignments to the Right

Activity 5.3a – Revise Assignments - Genevieve

Genevieve will start working 20% of her time per period on all her billable projects for the next three months. Gus, as the resource assigner, needs to identify all billable projects for the next three months and make the necessary adjustments to her people assignments. This activity uses a Project Periodic Forecast Report to locate the applicable projects and the Project People Assigner to make the adjustments. Remain logged in as Gus Lead. (userid: glead password: welcome)

Activity Steps

Run a Forecast Report to view Genevieve's Assignments

1. Navigate to **Reports > Dashboard > Project Reports Section > Periodic Reports >** select **Forecast**
2. Use Saved Report '**MPR-Activity 5.3a Project Periodic Forecast'**

   ` OR

   Set up the report manually using the following criteria
   a) PERSON: filter for **%00** and select **UU User 00(Lead) Genevieve**
   b) PROJECT TYPE: filter for **BILLABLE**
   c) REPORTING PERIOD: choose **Month** and '**06/01/2021**
   d) NUMBER OF PERIODS: enter **3**
   e) SCHEDULE TYPE: **Report on Budgets**
   f) CELL OPTIONS: **Hours**
   g) COLUMN OPTIONS: choose '**Show Projects'**
3. The report will have several projects that Genevieve is assigned to

Use the Forecast Menu to create a People Assigner grid

1. Navigate to **Forecast > People Assigner**
2. Use Saved List '**MPR-Activity 5.3a People Assigner Grid – Genevieve'**

   OR

   Set up the grid manually using the following steps:
   a) ASSIGN VIEW: select **People for many projects**

b) ASSIGNING PERIOD: **Calendar Semi-Month**, **6** increments, starting **06/01/2021**
c) BUDGET IN: Utilization
d) PERSON: filter for last name of **%00** and select **Genevieve**
e) DISPLAY OPTIONS: check **Show Project/Task Dates**
f) Click the Assign tab to display the grid

Update Genevieve's projects

1. Double click on the gray banner for PROJECT to open all of the assignment periods at the same time
2. Check the box to **Enable Budget field for updates**
3. Change the Utilization to .20
4. Click Save

Activity 5.3b – Swap Assignments for Blitz to Mercedes

Blitz will leave the team to take on a special project next quarter. Mercedes will assume all of Blitz's hours until the end of any project Blitz is assigned to work on. Use tools in the system to determine which projects need to be adjusted and then use the swap feature to move all of Blitz's future assignments to Mercedes

This activity will use a Project Schedule Detail Report to locate applicable assignments and the Forecast Menu to adjust the People Assignments.

Remain logged in as Gus Lead. (userid: glead password: welcome)

Activity Steps

Run a Project Schedule Detail Report to locate Blitz's assignments

1. Navigate to **Reports > Dashboard > Project Reports Section > Detail Reports >** select **Schedule Details**
2. Use Saved Report '**MPR-Activity 5.3b Project Schedule Detail'**

   ` OR

   Set up the report manually using the following criteria
   a) PERSON: filter for **%01** and select **UU User 01, Blitz**
   b) PERFORMANCE PERIOD: choose **6/1/2021 – 12/31/2021**
   c) SCHEDULE TYPE: **Report on Assignments**
3. The report will have several projects that Blitz is assigned to

Use the Forecast Dashboard to create a People Assigner Grid

1. Navigate to the **Forecast > People Assigner**
2. Use Saved List '**MPR-Activity 5.3b People Assigner Grid – Blitz**

   OR

   Set up the grid manually using the following steps:
   g) ASSIGN VIEW: select **Projects for many People**
   h) ASSIGNING PERIOD: **Calendar Semi-Month**, **26** increments, starting **6/1/2021**

i) BUDGET IN: select **Hours**
j) PERSON: filter for last name of **%01** and press the control key and select **Blitz** and **Mercedes** to select only these two users
k) DISPLAY OPTIONS: check **Show Project/Task Dates**
l) Click the Assign tab to display the grid

Update Blitz's project assignments
Blitz has two projects with assignments. Use the steps below to swap hours and understand more about using consistent assignment increments.

1. On the first project (CUST-4-UU4 RSMGNT-C01-INNOVATION-L), double click on Blitz's name to edit the entire row of assignments on this project
2. In the top left corner, use the Person selector to swap these hours and assignment settings to Mercedes
3. Note: there is no need to make any other edits on this screen. All components of Blitz's assignments will move to Mercedes.
4. Click **Save**
5. On the second project (CUST-4-UU4 RSMGNT-GENERAL-PROJECT) you will notice that the cells are gray and you are unable to edit.
6. Click the Search tab to return to the criteria filters.
7. Change the Assigning Period selector to Period of Performance
8. Click the Assign tab to show the grid in this increment.
9. Repeat the steps to swap Blitz's hours to Mercedes
10. Click Save

Activity 5.3c – Shift Assignments to the right - Rudy

Rudy is going on FMLA. His project assignments need to be moved to the right by three periods. Use a report to determine which projects Rudy has an assignment and determine the quickest way to adjust his assignments. These activity steps use a Project Performance report and the Project > People Assigner Grid to make the adjustments. Remain logged in as Gus Lead. (userid: glead password: welcome)

Activity Steps

Run a Project Periodic Performance Report to locate Rudy's assignments

1. Navigate to **Reports > Dashboard > Project Reports Section > Periodic Reports >** select **Performance**
2. Use Saved Report '**MPR-Activity 5.3c Project Periodic Performance-Rudy'**
   ` OR
   Set up the report manually using the following criteria
   d) PERSON: filter for **%01** and select **UU User 01, Rudy**
   e) REPORTING PERIOD: choose **Month** and start date of **6/1/201**
   f) NUMBER OF PERIODS: **12**
   g) ROW OPTIONS: check only **Show Budgets**

h) COLUN OPTIONS: only check **Show Projects**

3. The report will have one project that Rudy is assigned

Use the Project Dashboard to create a People Assigner Grid

4. Open a new tab by right clicking on Contracts menu and choose open in new tab
5. In the new tab, navigate to **Contracts > Project > Dashboard**
6. On the Left side menu, under Quick Links, choose Managed Projects
7. Edit the project from the performance report in Step 2
   (CUST-4-UU4 RSMGNT-C01-INNOVATION-L)
8. Navigate to the left side menu and choose People Assignments > Assign with Grid
9. Use Saved List '**MPR-Activity 5.3c People Assigner Grid – Rudy'**

   OR

   Set up the grid manually using the following steps:
   a) ASSIGNMENT VIEW: select **Project**
   b) ASSIGNING PERIOD: **Calendar Semi-Months**, **26** increments, starting **6/1/2021**
   c) BUDGET IN: select **Hours**
   d) DISPLAY OPTIONS: check **Show Project/Task Dates**
   e) Click the Assign tab to display the grid

Update Rudy's project assignments

11. Locate Rudy's assignment row
12. Check the box next to his name to select this user's assignments
13. Below the grid, note the **Number of periods** field is now editable. Enter **3**
14. Click the **Shift Right** button to move the assignments to the right by 3 periods.
15. Click **Save**

Check your understanding

Which of these are recommendations in the monitor and control phase?

a) Run reports on actuals + forecast
b) Use project notes to document the project along the way
c) Create an internal process to perform periodic reporting
d) Create saved shared reports for emails and dashboards
e) All of the above

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

APPENDIX A: Check Your Understanding Answer Key

Lesson 1: Identifying Resources

Which Unanet report(s) can help determine 'who is available' to be planned on a project?

a) Resource Allocation and Bar Chart Reports
b) Schedule Details Reports
c) People Periodic Performance Report

Lesson 2: People Plans

Which of the following help define a Valid Plan?

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

It is recommended to select the labor category field and allow the bill rates to be derived by the labor category setup at the project level. What may not doing so likely result in?

The wrong labor category and rate being derived by the system.

Which values are entered on the expense budgeter grid in Unanet?

d) Fully burdened costs
e) Direct costs
f) Negative costs

Lesson 3: Project Alerts & Notes

Project notes can be filtered by type and status and assigned to a specific user with due dates.

a) True
b) False

Lesson 4: Project Approvals & Estimates to Completion

The ETC Wizard shows updates by the project team at the project/task level as well as entries by the timesheet users.

a) True
b) False

Lesson 5: Monitor & Control Phase

Which of these are recommendations in the monitor and control phase?

a) Run reports on actuals + forecast
b) Use project notes to document the project along the way
c) Create an internal process to perform periodic reporting
d) Create saved shared reports for emails and dashboards
e) All of the above

COMPLETION CERTIFICATE AND EVALUATION

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 evaluation.