

# Quick Topic - Using the Automatic Project Code Generator

*Title: Using the Automatic Project Code Generator*

*Brief description:*

This topic covers the steps required to set up and use the automatic Project Code Generator.

*What's covered in this document:*

- [Using the Project Code Generator as a Project Manager](#)
- [Other Notes](#)
- [Additional Information](#)

## Setting up your system to autogenerate Project Codes

1. Navigate to **Admin > Properties > Unanet > General > Automatic Project Code Generation**.
2. Select your desired *Project Code Source* (e.g., Project Type, Project Organization, Owning Organization, or Legal Entity).
3. Specify the desired *Project Code Separator*, if any, to be used to segregate the Project Code Source and the *Project Code Sequence*.
4. Select a value (minimum of "1") for *Project Code Sequence Number Minimum Length*.
5. Click **Save**.

The screenshot shows the Unanet Admin interface. The top navigation bar includes 'Organizations', 'Project', 'People', 'Forecast', 'Time', 'Expense', 'Financials', 'Documents', 'Admin', and 'Reports'. The main heading is 'Admin - Configure System Properties'. Below this is a search bar for 'View all property settings' and an 'AUDIT TRAIL' button. The 'CONFIGURE YOUR UNANET SYSTEM' section is expanded to show 'Automatic Project Code Generation'. The 'Project Code Source' dropdown is highlighted in yellow and has a dropdown menu open showing options: 'Project Type', 'Project Organization', 'Owning Organization', and 'Legal Entity'. Other settings include 'Project Code Separator', 'Project Code Sequence Number Minimum Length', 'Images', and 'Search/Filter Settings'. A 'Save' button is visible at the bottom left.

This is a close-up of the 'Automatic Project Code Generation' settings. The 'Project Code Source' dropdown is set to 'Project Type'. The 'Project Code Separator' field is empty. The 'Project Code Sequence Number Minimum Length' dropdown is set to '1'. The 'Project Code Source' and 'Project Code Sequence Number Minimum Length' labels are highlighted in yellow.

## Specify your generation logic for the Project Code Source in Admin Setup or Organizations

The following screenshots illustrate how different Project Code Sources are set.

1. Under *Project Code Source*, select "Project Type."

2. Navigate to **Admin > Setup > Project > Types** to see the changes below.

PROJECT TYPE	DESCRIPTION	START WITH PROJECT CODE SEQUENCE #	LAST USED SEQUENCE #	ADMINISTRATIVE	BILLABLE	ACTIVE
ADMIN	General and Administrative	1	0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
B&P	Bid And Proposal	1	0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
BILLABLE	Direct Billable	1	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BRIEF	Contract Brief	1	0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
FA	Fixed Asset	1	0			<input checked="" type="checkbox"/>
NON-BILL	Direct Non-Billable	1	0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
PROPOSAL	Solic. responses & other propo	1	0			<input checked="" type="checkbox"/>
PTO-LEAVE	Paid Time Off/Leave	1	0			<input checked="" type="checkbox"/>
R&D	Research and Development	1	0			<input checked="" type="checkbox"/>
TEMPLATE	Template for setup copying	1	0			<input checked="" type="checkbox"/>

Total Rows: 10

3. Navigate to **Admin > Properties > Unanet > General > Automatic Project Code Generation.**

4. Under *Project Code Source*, select "Project Organization" or "Owning Organization."

5. Navigate to **Organizations > List** and edit an Organization to see the changes below.

Organizations – Profile for CUSTOMER-1 (CUSTOMER-1 - Customer 1)

Profile Financials 1099 Other

ACTIVE

\* Organization Code: CUSTOMER-1

\* Organization Name: Customer 1

Organization Type: CUSTOMER

Organization Parent: CUSTOMER - Customer

External System Code:

\* Start With Project Code Sequence #: 1

Last Used Sequence #: 0

MARKET DATA

Org Size: 250

NAICS/SIC Code: 813910

Classification: GC

Industry: Gov-Con

Sector: Gov

Stock Symbol: GNN

Home Page: www.govcon.com

\* Indicates required field

Save Cancel

6. Navigate to **Admin > Properties > Unanet > General > Automatic Project Code Generation.**

7. Under *Project Code Source*, select "Legal Entity."

8. Navigate to **Organizations, Search** tab, and select the LEGAL ENTITY from the dropdown menu. The extra fields from the autogenerate setting only appear on the Organization designated as the Legal Entity.

Organizations – Profile for MYCO (MYCO - My Company)

Profile Financials 1099 Other

ACTIVE

\* Organization Code: MYCO

\* Organization Name: My Company

Organization Type: INTERNAL

Organization Parent:

External System Code:

\* Start With Project Code Sequence #: 1

Last Used Sequence #: 0

MARKET DATA

Org Size:

NAICS/SIC Code:

Classification:

Industry:

Sector:

Stock Symbol:

Home Page:

\* Indicates required field

Save Cancel

Using the Project Code Generator as an Admin

The Project Code is editable to Admins when adding or copying a project.

The screenshot shows the 'Project - Create Project' form in the Unanet system. The navigation bar includes 'Organizations', 'Project', 'People', 'Forecast', 'Time', 'Expense', 'Financials', 'Documents', 'Admin', and 'Reports'. The form has tabs for 'Profile', 'Budget', 'Accounting', 'Access', 'Time', 'Expense', 'Item', 'Alerts', and 'Other'. The 'Profile' tab is active. The form contains the following fields and options:

- \* PROJECT STATUS: <Please pick a value>
- CONDITION:  Green  Red  Yellow
- \* Owning Organization: [Text Field]
- \* Project Organization: [Text Field]
- Project Code:** [Text Field - highlighted in yellow]
- Project Title: [Text Field]
- \* Project Type: ADMIN
- Comment: [Text Area]
- Project Management Level:  MANAGE AT TASK LEVEL
  - Require Tasks for Time Reporting
  - Require Tasks for Expense Reporting
  - Require Tasks for Item Reporting

\*Indicates required field

Buttons: Save, Cancel

To autogenerate the Project Code, leave the *Project Code* field blank and click **Save**. The *Project Code* field is populated as shown below.

The screenshot shows the 'Projects - Profile for CUSTOMER-1 ADMIN1' form in the Unanet system. The navigation bar includes 'Organizations', 'Project', 'People', 'Forecast', 'Time', 'Expense', 'Financials', 'Documents', 'Admin', and 'Reports'. The form has tabs for 'Profile', 'Budget', 'Accounting', 'Access', 'Time', 'Expense', 'Item', 'Alerts', and 'Other'. The 'Profile' tab is active. The form contains the following fields and options:

- \* PROJECT STATUS: 2-Open (Active)
- CONDITION:  Green  Red  Yellow
- \* Owning Organization: MYCO - My Company
- \* Project Organization: CUSTOMER-1 - Customer 1
- \* Project Code:** ADMIN1
- Project Title: [Text Field]
- \* Project Type: ADMIN
- Comment: [Text Area]
- Project Management Level:  MANAGE AT TASK LEVEL
  - Require Tasks for Time Reporting
  - Require Tasks for Expense Reporting
  - Require Tasks for Item Reporting

\* Indicates required field

Buttons: Save, Cancel

Project Manager: Controller, Frank T. (fcontroller)

Project was saved.

# Using the Project Code Generator as a Project Manager

The Project Code field is not editable (grayed out) for Project Managers, meaning the *Project Code* will always be autogenerated.

The screenshot shows the 'Project - Create Project' form in the Unanet system. The 'Project Code' field is highlighted in yellow and contains the text '<Auto Generated>'. The form includes several other fields and options:

- PROJECT STATUS:** A dropdown menu with '<Please pick a value>' selected.
- CONDITION:** Radio buttons for Green, Red, and Yellow.
- Owning Organization:** A text input field with a search icon.
- Project Organization:** A text input field with a search icon.
- Project Code:** A text input field containing '<Auto Generated>'.
- Project Title:** A text input field.
- Project Type:** A dropdown menu with 'ADMIN' selected.
- Comment:** A text area with a clear icon.
- Project Management Level:** A section with a checkbox for 'MANAGE AT TASK LEVEL' and three sub-checkboxes: 'Require Tasks for Time Reporting', 'Require Tasks for Expense Reporting', and 'Require Tasks for Item Reporting'.

At the bottom left, there is a 'Save' button and a 'Cancel' button. A note at the bottom left states '\*Indicates required field'.

## Other Notes

- When using the "Copy Project" feature:
  - As an Admin, if you delete the *Project Code* before the initial Save, the Project Code generator will kick in. Otherwise, it will take whichever unique *Project Code* you apply.
  - As a Project Manager, the *Project Code* will be grayed out and the generator will apply.
- Import Projects: You can import projects without a *Project Code* to use the Auto-Generation. In the example below, the *Project Code* value is blank.

	A	B	C	D	E	F	G	H	I	
1	*project_org_code	project_code	project_type	project_status	project_manager	open_edit	self_signup	self_plan	self_assign_plans	allc
2	CUSTOMER-1		BILLABLE	2-Open	FCFO		Y	C	N	Y
3										
4										
5										
6										

## Additional Information

[Quick Video - Project Code Generator](#)

[Help Docs - Project Code Generator information](#)

