FAQ - Is there a checklist for setting up a new project?

Question

Is there a checklist for setting up a new project?

Solution

Unanet has a checklist template below that our clients can use to develop their own checklist for the project profile.

Unanet recommends that projects are copied from a template or integrated from another system. This document should help to verify that all necessary fields are populated.

PROJECT STATUS - Pick a status level from the dropdown menu. CONDITION - Select a value (Green, Red, Yellow).		
Field	Value	
Profile		
Owning Organization	Company or Department; Billing Remit To	
Project Organization	Client – key field	
Project Code	Project ID – key field	
Project Title	Descriptive project ID	
Project Type	Select appropriate value from dropdown menu	
Comment		
Project Mgmt Level	Manage at Task Level (Time, Expense, Item)	
COMPLETED DATE - Select a completed date when applicable.		
Budget		
COMPLETED PERCENT	Hours, Labor Cost, Total Cost	
PROJECT DATES	Original Dates, Revised Dates (required), Enforce Project/Task Dates	
MISCELLANEOUS	Project Probability Percent	
HOUR BUDGETS	Budgeted, ETC, Est. Total	
LABOR BUDGETS	Bill $ (Budged, ETC, Est.Total) Cost $ (Budgeted, ETC, Est.Total) Burdened Cost $ (Budgeted)	
EXPENSE BUDGETS	Bill $ (Budged, ETC, Est.Total) Cost $ (Budgeted, ETC, Est.Total) Burdened Cost $ (Budgeted)	
Accounting		
ACCOUNTING	Billing Type (CP, FP, NB, TM) Posting Group (Direct, Indirect) Cost Structure (Select appropriate value) External System Code	

PROJECT VALUE	Total Value $ Funded Value $ Limit Billing To Funded Value Less Fixed Fee (checkbox) Limit Revenue To Funded Value Less Fixed Fee (checkbox)	
FEE(S)	CALCULATION METHOD (Hours, Total Cost, Total Labor, Total ODC) FACTOR TYPE (Number, Percent) FACTOR FIXED FEE AMOUNT	
Fees		
Access		
ORG ADMIN ACCESS	Select as appropriate	
USER ACCESS	Self Plan (Open, Closed, Assign) Assign Self Plans Self Assign	
Time		
Designate as Leave Project	Select as appropriate	
Allow time Reporting	Select as appropriate	
Require PO for Non-Employee (PO) Time	Select as appropriate	
Allow Future Charges	Do not select for DCAA/billable	
Require Comments	Select as appropriate	
Location Required	Select as appropriate	
Default Location	Select as appropriate	
Default Pay Code	Select as appropriate	
Time In/Out	Select as appropriate	
Bill Rate Source	Select as appropriate	
Cost Rate Source	Select as appropriate	
Labor Category usage	Select as appropriate	
Expense		
Allow Expense Reporting	Select as appropriate	
Require PO for Non-Employee (PO) Time	Select as appropriate	
Item		
Allow Item Reporting	Select as appropriate	
Alerts		
PROJECT PERFORMANCE ALERTS	No Alerts, Use Default Preferences, Custom	
Alert Methods	Select as appropriate	
Show Alerts To	Select as appropriate	
Show Alerts When	Select as appropriate	
Other		
PROJECT USER-DEFINED FIELDS	As specified.	

Left Navigation Menu		
Tasks	Set up submenu items as needed.	
Administrators	Set up submenu items as needed.	
Accounts	Set up submenu items as needed.	
Billing	Set up submenu items as needed.	
Budget Snapshots	Set up submenu items as needed.	
Expense Budgets	Set up submenu items as needed.	
Expense Plans	Set up submenu items as needed.	
Expense Types	Set up submenu items as needed.	
Items	Set up submenu items as needed.	
Labor Categories	Set up submenu items as needed.	
Locations	Set up submenu items as needed.	
Notes	Set up submenu items as needed.	
Pay Codes	Set up submenu items as needed.	
People Assignments	Set up submenu items as needed.	
People Plans	Set up submenu items as needed.	
Plan Sets	Set up submenu items as needed.	
Reports/Charts	Set up submenu items as needed.	

Additional Information

Help Docs - Importing Projects.

KC - FAQ - Is there a checklist for setting up a new user?