Project Types

Introduction:
Project Type is a key reporting field and may be used to categorize different types of projects.

Description:
It is critical to define Project Types carefully. The Project Type most often classifies projects into categories such as Billable, Non-Billable, or Internal. In many cases, even more specific Project Types are created to further enhance reporting and filtering in the Unanet application. Examples of more detailed Project Types include Billable-FP and Billable-T&M instead of just Billable, and G&A and OH (Overhead) instead of just Internal. Project Types are typically a one-time setup. Administrators must select whether Project Type is Administrative (Default), Billable, and/or Active. Note that the Billable flag or check box in the Admin > Setup > Project > Project Types is a key driver of determining billable amounts and revenue.

Project Types can be identified at the Project level and also at the Task level. Project Types may also be selected on the timesheet or expense report if the Admin properties have been set to expose the Project Type dropdown menu in time and/or expense. We recommend, however, that project types not be exposed on the timesheet or expense report since it is not possible to restrict the project type list by project. This results in, for example, the possibility of the G&A project type being selected on a billable project, which would be inappropriate. Instead, the project type should be set at the task level and the person should choose the appropriate task.

If the Project Type is displayed in the timesheet or expense report, then neither the default project or task level Project Type setting will constrain the user when entering data on their timesheets. These values are simply defaults, used to automatically select that particular Project Type when a new row is created on the timesheet or expense report. The user can subsequently override the default value.

If, however, the Project Type column is hidden in the timesheet or expense report, then the default project type value from the project or task will be the value stored with the time or expense entry. Typically, the Project Type on the timesheet is hidden and therefore controlled at the task level or project level.

Project Types are available in conjunction with cost accounts (by expense type) and posting group accounts (for example, labor).

Best Practices:

- Direct projects may at times need to have non-billable work reported. An additional Project Type of "Direct-NB" can be set up. Tasks can then be set up with the project type of "Direct-NB" and users can be assigned to those tasks in order to track direct work that is not billable. Ensure Project Types are set up with enough granularity to be meaningful.
- Define posting accounts by Project Types if the customer wants to post to different General Ledger accounts based on the Project Type rather than requiring them to specify the accounts on a project-by-project basis.

Additional Information

Help Docs - Project Types