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INTRODUCTION

This document is a user guide for the ULF Database. This software replaces the previous Unionlearn Central Database (UCD) system.

Unions participating in projects funded by the Union Learning Fund\(^1\) (ULF) must report their progress via the ULF Database. This includes both financial and outcomes data.

The website design is responsive\(^2\), so it can be used on mobile and tablet as well as desktops and laptops. However, when entering large amounts of data, it is recommended to use a desktop or laptop as larger screens will make the process easier.

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\(^1\) [https://www.unionlearn.org.uk/union-learning-fund](https://www.unionlearn.org.uk/union-learning-fund)

\(^2\) [http://www.infobo.com/what-is-responsive-design](http://www.infobo.com/what-is-responsive-design)
GETTING STARTED

The ULF Database is accessed at the following address:

https://ulf.unionlearn.org.uk

Please note that the connection is encrypted to allow information to be entered securely.

In order to use the system, you will require a user account. If you do not have a user account, please contact unionlearn to request one.

Click on the login link and enter your username or email, along with your password. If you are having any problems logging in, please contact unionlearn.

Once you are logged in, you will see some navigation links on the left-hand side, and the home page ‘dashboard’ that provides you with the latest details for the currently ‘selected’ project. Any relevant notifications alerts will be displayed here along with information and graphs related to the selected project.

You can change the project by selecting from the project dropdown list and clicking on the ‘Show’ button.
There are four main sections of the ULF Database system:

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home</strong></td>
<td>Displays latest notifications, headline information and graphs related to the currently selected project.</td>
</tr>
<tr>
<td><strong>Applications</strong></td>
<td>Create, edit and submit a new application for a ULF funded project. Previous closed applications can also be browsed.</td>
</tr>
<tr>
<td><strong>Projects</strong></td>
<td>Access and manage your projects. This is where the monthly claims and outcome returns are prepared and submitted.</td>
</tr>
<tr>
<td><strong>Reports</strong></td>
<td>Create and view reports on outcomes and finances as well as progress to the profile and/or forecasts.</td>
</tr>
</tbody>
</table>
APPLICATIONS

The applications area allows unions to apply for their ULF funded projects. Draft applications can be created and revised before submitting and previous, closed applications can also be viewed.

The options for creating, editing or viewing notes on applications can be seen within the page:

When creating an application, an online form will display the required information for the given ULF round. While this needs to be completed before being submitted, draft and incomplete versions can be saved, allowing the form to be revised over a period before being sent to unionlearn.
Notifications related to existing applications will appear on the home page and also on the main applications page.
The ‘projects’ area of the ULF Contracts Database is for accessing detailed information about any ULF projects as well as for submitting the monthly financial and outcome reports.

All the projects that can be accessed will be listed on the main projects page. This includes completed projects, where access to historical information could be useful. Any notifications related to a project are highlighted.

Selecting the ‘view project’ option takes the user to the project overview page. This is where the project is managed and the monthly claims are created and submitted.

Draft monthly claims/reports can be created, edited and saved before submitting. Accepted claims can be viewed, but cannot be edited. The following screenshot provides an overview of the projects page.
Project Test Project 27052016

Details

- Application Status: Successful
- Union: 
- Funding Round: 0

Links

View Application form | view letter (new of 1) | Complete your profile

Basic project information

Notices

You need to re-profile.

Please complete your re-profile, all costs already claimed are fixed, and so we require you to re-profile the remainder as per your current forecast to year end. Please complete your report by clicking here.

Project notifications

Files

There are no files currently uploaded

Add a file

No file selected.

Upload files to the project

Claims

Create, amend, submit and view monthly claims

<table>
<thead>
<tr>
<th>Month</th>
<th>Due Date</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>April</td>
<td>15/05/2016</td>
<td>Accepted</td>
<td>View/Edit</td>
</tr>
<tr>
<td>May</td>
<td>15/06/2016</td>
<td>Accepted</td>
<td>View/Edit</td>
</tr>
<tr>
<td>June</td>
<td>15/07/2016</td>
<td>Accepted</td>
<td>View/Edit</td>
</tr>
<tr>
<td>July</td>
<td>15/08/2016</td>
<td>Accepted</td>
<td>View/Edit</td>
</tr>
<tr>
<td>August</td>
<td>15/09/2016</td>
<td>Draft</td>
<td>View/Edit</td>
</tr>
<tr>
<td>September</td>
<td>15/10/2016</td>
<td>Draft</td>
<td>View/Edit</td>
</tr>
<tr>
<td>October</td>
<td>15/11/2016</td>
<td>Draft</td>
<td>View/Edit</td>
</tr>
<tr>
<td>November</td>
<td>15/12/2016</td>
<td>Draft</td>
<td>View/Edit</td>
</tr>
<tr>
<td>December</td>
<td>15/01/2017</td>
<td>Draft</td>
<td>View/Edit</td>
</tr>
<tr>
<td>January</td>
<td>15/02/2017</td>
<td>Draft</td>
<td>View/Edit</td>
</tr>
<tr>
<td>February</td>
<td>15/03/2017</td>
<td>Draft</td>
<td>View/Edit</td>
</tr>
<tr>
<td>March</td>
<td>15/04/2017</td>
<td>Draft</td>
<td>View/Edit</td>
</tr>
</tbody>
</table>
Once your project application has been approved you are required to submit Financial, Staffing and Outcome profiles for the project, and these are now entered via the database, through a link on the project overview page:

The process of calculating your profile **remains the same**; it is imperative that you base both your financial and outcomes profiles on actual project plans. Do not divide the annual budget by 12 (unless staff costs or a cost that occurs monthly, such as rent), all profiles must be monthly not quarterly, and they must be based on when the activity will take place.
FINANCE PROFILE

The template on the database shows your annual budget against each heading in the ‘Budget’ column, taken from the approved budget on your application.

There are blank fields for you to enter your monthly profile amounts against each heading, and the database automatically sums these for you in the ‘Total’ column.

The ‘Still to Profile’ column will read 0.00 when the budget is correctly profiled across 12 months – if there is any other figure in this column, you have under or over profiled the budget amount.

When a budget is correctly profiled, the line will turn from red to blue, indicating the Total column matches the Budget column.

All budget lines need to be correctly profiled, and months with a zero spend do not require a zero to be entered, you can just leave them blank.

STAFF PROFILE

You are required to enter the monthly salary cost for each member of staff working on the project. The template is the same as for the Finance Profile, with a Budget column, blank fields to enter the monthly amounts, a Total column that sums the months entered and a Still to Profile column that will read 0.00 when the budget is correctly profiled.
The total for each month must match the total you have entered in your Finance Profile against the Staff Costs budget line – the Staff Profile is a role by role breakdown of this budget.

You may find it helpful to complete the Staff Profile first and then use the figures returned in the Total row to populate the Finance Profile, thus ensuring that they match correctly.

Any project where these figures do not match will have their submitted profiles returned for correction.

**OUTCOMES PROFILE**

The total outcomes profile will be brought through from the application form. There are blank fields in red to complete. The colour will change from red to blue when you have successfully entered your outcome profile. It will automatically be totalled up.
You can save your profiles as draft versions and return to them later by clicking on ‘Save as Draft’ at the bottom of the profiles screen.

Once your profiles are complete, you need to submit them for review by clicking ‘Mark as Complete for Review’.

Your profiles will be submitted to unionlearn, and will be checked for completeness and logic.

Once approved, you will be ready to start submitting monthly claims and outcome returns.

If your profile is returned to you, you will need to amend it by following the same process as above. Unionlearn will let you know what needs to be changed or added via a message in the Project Notes area.

Any notes can be accessed via the Project Overview page:
Finance claims and outcome returns are now submitted via the ULF Contracts Database; the benefits of this are that you only need to enter the information once, all information is held in one place and reports can be automatically generated to provide updates on progress.

The deadline for submitting both financial claims and outcome returns remains the 25\textsuperscript{th} of the following month, e.g. 25\textsuperscript{th} July for your June returns.

The information needs to be entered in the relevant month which is accessed via the Project Overview page:

Scroll down from the top of the page
Once you have clicked on the month for which you wish to report, you’ll see the following screen:

Enter your Financial Claim information here

Enter your Outcome Return here

Generates a report which shows your progress against profile to date, both monthly and cumulatively

Submits your claim – only to be done once both Financial and Outcome returns are complete

EXPENDITURE RECORDS

This is the page for the entry of all expenditure details other than Staff Costs, which are entered separately on the Staff Costs page. The template requires some detail for each item of expenditure, and it has been designed to try and minimise the queries unionlearn have with your claims, and provide a clear audit trail for everything you spend.
The screenshot below details an example:

Once you have entered all the detail for this item, click on ‘Save’; the details will transfer to a table at the bottom of the page and the following message will be returned at the top of the screen:

**Success! You have uploaded the expenditure information.**

The table is a useful summary of what you have entered, and can be exported to form a report.

You can also use the **copy** and **edit** functions to create duplicate entries that can then be edited – for budget headings where there are many individual items claimed each month, such as Travel and Subsistence, data entry can be significantly reduced.

The screenshot on the next page shows the key features of the Expenditure Records table:
The key things to remember are to enter **as much detail as you can** for all items of expenditure, and that using the **copy** and **edit** functions will reduce the data entry burden for larger claims.

There is also the option to copy data across to the next month’s claim, where you can use the **edit** function to simply amend the date and amount for any costs that recur month to month – this is covered in more detail later on.

<table>
<thead>
<tr>
<th>Budget Heading</th>
<th>Document Ref</th>
<th>Description</th>
<th>Supplier</th>
<th>Amount</th>
<th>Log</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Promotion</strong></td>
<td>EY146/0001</td>
<td>SAT Poster to promote Learning Centre open day - April 18</td>
<td>Priy Chawing</td>
<td>£122.00</td>
<td>Yes</td>
<td>Both LEF and project logos present - posters used solely to promote project</td>
</tr>
<tr>
<td><strong>TOTAL Promotion</strong></td>
<td></td>
<td></td>
<td></td>
<td>£122.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Main Costs</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Travel and Subsistence for Project Team</strong></td>
<td>EY146/0021</td>
<td>Expenses - Project Manager April 2016</td>
<td>Project Manager</td>
<td>£366.24</td>
<td>No</td>
<td>All travel and expenses costs relating to project activity incurred in April 2016 - please see attached expenses claim form for breakdown (Stationary costs are included separately under Stationary budget)</td>
</tr>
<tr>
<td><strong>TOTAL Travel and Subsistence for Project Team</strong></td>
<td></td>
<td></td>
<td></td>
<td>£366.24</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL Main Costs</strong></td>
<td></td>
<td></td>
<td></td>
<td>£366.24</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Running Costs</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Stationary</strong></td>
<td>EY146/0030</td>
<td>Expenses - Project Manager April 2016</td>
<td>Project Manager</td>
<td>£70.99</td>
<td>No</td>
<td>Stationary costs claimed via PM expenses - diary purchased for project use - receipts attached with expenses</td>
</tr>
<tr>
<td><strong>TOTAL Stationary</strong></td>
<td></td>
<td></td>
<td></td>
<td>£70.99</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL Running Costs</strong></td>
<td></td>
<td></td>
<td></td>
<td>£70.99</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>OVERALL TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td>£588.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can print or export data from this table to create a useful monthly report of all non-staff expenditure.

**Edit** – use to correct any mistakes on submitted information

**Copy** – this function will return a copy of the data back in the entry table above – you can then change any details and submit – this is useful for entering numerous staff expenses claims, for example, where the amount and staff name can be changed without the need to enter all details again

**Delete** – use to delete any expenditure submitted in error

**Search** – can be used to refine the table so it only shows one budget heading, or costs associated with one staff member – useful when your claim is very large

Each individual budget heading is subtotalled

Each of the four main budget areas is also subtotalled so you can see how much you are claiming under each area

An overall total is returned at the bottom of the table
SUBMITTING SUPPORTING EVIDENCE

The requirements for submitting supporting evidence for all claims has not changed – please refer to the ULF Financial Management Guide or check with ULF Finance (ULFFinance@tuc.org.uk) if you need clarification. In order that the process be as flexible as possible, evidence can be submitted in the following ways:

- Uploaded via the ULF Database:
  - Against individual items of expenditure on the Expenditure Records page, as above
  - As one PDF document (scanned) on the Upload Evidence of Expenditure page, as below
- Via email to ULFFinance@tuc.org.uk
- In hard copy to ULF Finance, 3rd Floor, Congress House, Great Russell St, London WC1B 3LS

If you are not uploading the evidence via the database, please make a note on the Expenditure Records page that the evidence will follow by email or in hard copy.

To navigate from the Expenditure Records page back to the claim overview page, use the ‘breadcrumb trail’ list at the top of the screen:

Clicking on ‘Claim’ above will take you back to the main claim overview page.
Staff costs need to be entered separately, in the same way that they were on the ULF Claim Template. This ensures a complete audit trail, and as staff costs are the largest element of all project budgets, having the detail separately ensures unionlearn can monitor against profile and query any variances.

Information must be entered in the following format for all staff on the project:

As with the Expenditure Records, when the Staff Cost is successfully entered the following message is returned:

Success! You have uploaded the staff information.
The data entered is returned in a table at the bottom of the screen:

As this summary table provides a complete record of the staff salary information, the only additional supporting evidence that we need is copies of any seconded staff salary invoices, and these should be uploaded to the main Upload Evidence of Expenditure page, as below. No other supporting evidence is required as long as the data entered here is complete.

There is also the option to copy data across to the next month’s claim, where you can use the edit function to simply amend the date and amount for any costs that recur month to month – this is covered in more detail later on.

As above, when all staff costs are entered use the breadcrumb trail to navigate back to the main claim overview page.

**UPLOAD EVIDENCE OF EXPENDITURE**

As above, supporting evidence can be uploaded item by item on the Expenditure Records page, it can be emailed or sent in hard copy as has always been possible, or it can be uploaded here.

Evidence to be uploaded should be scanned, and in PDF format. Unionlearn requires a hard copy of your supporting evidence; the fewer documents we have to print the better for us! If it is possible, all evidence should be scanned into one document and uploaded here. If this is not possible, we will accept evidence however you are able to submit it.
Once all evidence is uploaded, the financial claim for the month is complete.

**CLAIM INVOICE**

As with supporting evidence, this can either be sent to unionlearn Finance in hard copy or by email, or uploaded as above.

Any evidence emailed or sent in hard copy should arrive no later than 25th of the following month.
OUTCOME RETURNS

All monthly outcomes will be uploaded by clicking the **Upload outcome information** from the list below.

When you have clicked this link you will see the following table. Enter the total number of learners for each category for that month.
Press save to save all outcomes.
REPORT ON PROGRESS TO PROFILE

FINANCES

Once your claim information is entered, you can use the Report on Progress to Profile function to generate a report showing the spend against profile for the current month, and cumulatively.

The report shows budget, actual spend, £ variance and a % variance, and can be downloaded in PDF or excel format for project use:

OUTCOMES

Once your outcome information is entered, you can use the Outcome Summary Total function to generate a report showing the outcomes against profile for the current month, and cumulatively. There is a filter for you to select what you require in your report.
OTHER OUTCOMES

The other outcome box will appear when you send your claim for review to unionlearn. This will give you an opportunity to write your narrative report relating to any other outcomes not listed in the table above. Please include any good new stories or possible case studies.
SEND CLAIM FOR REVIEW

Once your Financial and Outcome returns are both complete, you can submit your claim to unionlearn for review.

As before, the deadline remains the 25th of the following month.

Claims are submitted via the Send Claim for Review page, accessed from the main claim overview page detailed above.

Explanations are required for any variance to budget, as below:

“If your finance or outcome returns for this month are showing any variance to profile (> 10% of any budget heading for finance and >15% for outcomes) please enter an explanation in the relevant box below that states the reason for the variance (e.g. planned event did not take place) and the plans you have in place to ensure the project gets back to profile within the next two months (e.g. event now happening next month). Your claim will not be approved for payment without this information. Please speak to your Projects Officer if you need to work with unionlearn to agree a plan or discuss your variance; any project under performing for two consecutive months will be subject to the ULF Underperformance Procedure, outlined in Schedule 1 of your contract.”

Once any variance explanation is entered, the Declaration needs to be ticked – this replaces the Claim Certification form previously required.
Unionlearn will check your claim as usual, and any queries will be resolved via email as usual.

If you need to make amendments to the claim, it will be returned to you with details of what you need to change or add.

Only complete claims with the appropriate evidence and any variance explanations will be paid. **Copying data across from the previous month**

The database allows users to copy all data entered in a previous claim across to the following month. This feature effectively means that for recurring costs such as staff salaries, staff expenses, rent, telephone bills etc, the data entry only needs to be done once when the first claim is submitted, and can then be copied across and edited for any future months.

The aim of this is to reduce the administrative burden on projects as far as possible, and also reduce the errors associated with needing to re-enter a large volume of data each month.
When on the main claim overview page for a subsequent claim, there will be the option to import from previous claim for both Expenditure Records and Staff Costs.

The imported records can then be amended using the edit function to show the values for the current month. Please note that no uploaded evidence from the previous month can be imported – new evidence to support the current month needs to be uploaded using the edit function.
STAFF COSTS

As with the Expenditure Records, the imported staff costs can then be edited using the edit function so they are correct for the current month.

All evidence needs to be uploaded for the new claim as detailed above, and it is not possible to import outcome information from a prior claim – this must be entered from scratch each month.
Project plans can change, and the database has been designed to allow for the starting finance profile to be amended as the project progresses. Reasons for amending the profile are to vire (move) money between budget headings, to increase or decrease the starting budget or to simply move expenditure to later in the project as plans change.

All changes to profile are subject to approval by unionlearn.

Amendments can be made on an ad-hoc basis initiated by the project, or as part of a fund-wide Review and Forecast exercise which requires all projects to formally complete a re-profile to the end of the project.

It is vital that all projects closely monitor their expenditure to date and what they have remaining to spend; if any under spend is identified, this can be returned to the fund via a formal Contract Variation to reduce the overall contract value.

Conversely, should the need for additional funds be identified, a bid can be submitted and subject to approval, a Contract Variation may be issued to increase the contract value.

**REQUESTING A RE-PROFILE**

An email should be sent to **ULFFinance@tuc.org.uk** to request that the profile held on the database be released for amendment. Unionlearn Finance will review the request and confirm when the profile is ready to be updated.

There will be a notification on the main home page:

![Notification Image]

On the project page, click on **Complete your profile** to access the opened profile:

![Profile Access Image]
The following screen is returned:

If any amendment has been made to the Staff Costs budget line, the change also needs to be made on your Staff Costs profile – these must always match.
The reports section of the ULF Database allows users to create and view reports on their projects. There are currently three reports available:

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Outcome Summary Totals</strong></td>
<td>Allows reports on the project outcomes to be generated. Users can select from a number of parameters to create bespoke reports.</td>
</tr>
<tr>
<td><strong>Cumulative Profile Report</strong></td>
<td>This report shows the accumulated expenditure for all of a union’s projects in the current ULF funding round.</td>
</tr>
<tr>
<td><strong>Progress to Profile</strong></td>
<td>This report allows quick access the monthly claims and totals and how they compare to the project profile.</td>
</tr>
</tbody>
</table>

**OUTCOME SUMMARY TOTALS**

![Outcome Overview](image-url)
Reported outcomes, and their progress to profile, can be viewed and exported using this report. A number of parameters can be selected for the report, including whether to display the forecast, actual or variance information and which projects to include in the report.

<table>
<thead>
<tr>
<th>Outcome Category</th>
<th>Outcome</th>
<th>April</th>
<th>May</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Union Learning Representatives (ULRs)</td>
<td>Number of new ULRs completing initial training</td>
<td>Profile: 0</td>
<td>Profile: 0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Actual: 0</td>
<td>Actual: 0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Variance: 0.00%</td>
<td>Variance: 0.00%</td>
</tr>
<tr>
<td>New Union Learning Representatives (ULRs)</td>
<td>How many have attended the TUC ULR stage 1</td>
<td>Profile: 0</td>
<td>Profile: 0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Actual: 0</td>
<td>Actual: 0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Variance: 0.00%</td>
<td>Variance: 0.00%</td>
</tr>
<tr>
<td>New Union Learning Representatives (ULRs)</td>
<td>How many have attended other (including own union) training for ULRs?</td>
<td>Profile: 0</td>
<td>Profile: 0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Actual: 0</td>
<td>Actual: 0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Variance: 0.00%</td>
<td>Variance: 0.00%</td>
</tr>
<tr>
<td>New Union Learning Representatives (ULRs)</td>
<td>Total trained</td>
<td>Profile: 0</td>
<td>Profile: 0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Actual: 0</td>
<td>Actual: 0</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Variance: 0.00%</td>
<td>Variance: 0.00%</td>
</tr>
<tr>
<td>Number of workplace reps/officers</td>
<td>How many have attended the generic TUC union rep Stage 1</td>
<td>Profile: 0</td>
<td>Profile: 0</td>
</tr>
<tr>
<td>receiving training on learning &amp; skills</td>
<td></td>
<td>Actual: 0</td>
<td>Actual: 0</td>
</tr>
<tr>
<td>/ ULR role</td>
<td></td>
<td>Variance: 0.00%</td>
<td>Variance: 0.00%</td>
</tr>
<tr>
<td>Number of workplace reps/officers</td>
<td>How many have attended other (e.g. union equivalent) training</td>
<td>Profile: 0</td>
<td>Profile: 0</td>
</tr>
<tr>
<td>receiving training on learning &amp; skills</td>
<td></td>
<td>Actual: 0</td>
<td>Actual: 0</td>
</tr>
<tr>
<td>/ ULR role</td>
<td></td>
<td>Variance: 0.00%</td>
<td>Variance: 0.00%</td>
</tr>
</tbody>
</table>

**CUMULATIVE PROFILE REPORT**

This report displays a breakdown of profiled expenditure for all projects in a current year. This is especially useful for unions with multiple projects and for ULF Database administrators, who can view the complete breakdown for all projects within a certain year.
PROGRESS TO PROFILE REPORT

This report allows quick access to all previously accepted monthly reports, monthly forecasts and an aggregated review/forecast for each project.

The overview page for this report displays all projects that the user has access to, with links to the monthly reports/forecasts and the aggregates review/forecast.

The review/forecast option is especially useful for monitoring progress against the profile throughout the lifespan of a project.
The monthly reports show the monthly claim/forecast information alongside the cumulative total for both expenditure and outcomes.
Throughout the ULF Database, the export options for data are above any data displays.

These options allow exporting in the following formats:

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>Creates a print out of the data. This can be of limited use if there is a large amount of data being displayed that is not suitable for printing.</td>
</tr>
<tr>
<td>Copy</td>
<td>This option copies the data from the page and onto the ‘clipboard’, allowing it to be pasted into Word documents, Excel files and other software.</td>
</tr>
<tr>
<td>PDF</td>
<td>Creates a PDF file from the data. The use of this option is limited by the quantity of the data below. It is sometimes advisable to export large amounts of data into Excel for formatting before converting into a PDF.</td>
</tr>
<tr>
<td>Excel</td>
<td>Creates a Microsoft excel file containing the data. This is useful for further manipulation of the data or for preparing data for import into another system.</td>
</tr>
<tr>
<td>CSV</td>
<td>Exports the data in the ‘Comma Separated Values’ (CSV)</td>
</tr>
</tbody>
</table>
FILTERING BY TEXT SEARCH

The data exports can be filtered by using the text search. Any text entered will narrow the results down for both the display and for exporting.

For example, typing in ‘IT ex’ filters the displayed data, so that only the ‘IT expenditure’ category is shown. This filtered information can then be exported using the various export options.

![Progress for Claim for May](image-url)