SuiteProjects Pro

Glossary

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Table of Contents

Glossary

Quick Links

A • B • C • D • E • F • G • H • I • J • K • L • M • N • O • P • Q • R • S • T • U • V • W • X • Y • Z

A

Access Control

Access Control defines the level of access that is granted to the assigned employees. Access Control can be set for the following items: Customers, Projects, Project stages, Services, Employees, Expense Items, Charge stages, and Booking types. The filter sets provide the access relationship of those items to a specific employee through discrete selections or with a meta value relationship description. For example, employees may have access to Project XYZ or to all projects they directly own. For more information, see the help topic Access Control Overview.

Accounting Dates

You can establish Accounting Dates for a variety of transactions. You can associate Accounting Dates with timesheets, time entries, expense reports, receipts, invoices, revenue containers, and recognition transactions as well as with reports drawing from these accounting dates. The ability to maintain separate accounting dates can be particularly helpful when the original transaction date of an entity must be independent from the financial accounting date, as signified by a financial report or general ledger application. For more information, see the help topic Accounting Dates.

Accounting Period

The accounting period functionality allows you to associate separate accounting dates with most transactions as well as with reports drawing from these accounting dates. The ability to maintain separate accounting dates can be particularly helpful when the original transaction date of an entity must be independent from the date, as signified by a financial report or general ledger application. For more information, see the help topic Accounting Periods.

Accounts Payable Locations

Accounts payable locations are for your company's billing addresses. Your company may have multiple accounts payable addresses, which can be each location, a regional office, or a shared services facility. Accounts payable locations are only available in the Purchases Module. After they are created, you can choose the appropriate accounts payable location when creating a PO so that the vendor is aware of the correct billing address when invoicing for this purchase. For more information, see the help topic Accounts Payable Locations.

Action Item

See Issue.

Administrator

Administrator is a special role that allows a user to perform key account administration duties. For more information, see the help topic Role Permissions.

Agreements

Agreements are contracts or SOWs that are used to track budget balances. Agreements may be associated with a project then assigned to the project billing rules for the tracking of balances. As such, agreements are created for a specific customer. An agreement may encompass multiple projects. An agreement can be used in conjunction with Customer POs, independent of Customer POs, or not at all. Agreements are standard reporting fields and can provide the remaining balance on the agreement and the charges to date. For more information, see the help topic Agreements.

Alert

Alerts are time driven events that based on set conditions can auto-generate emails. An alert consists of a set of event rules and the time(s) to apply them at. This functionality allows you to send automated email reminders to ensure that company policies are followed, time is entered and submitted on time, and approvals are completed. There are several types of alert and multiple alerts of each type can be set up to meet varying business needs. For more information, see the help topic Alerts(Timesheet Alerts), Alerts (Expenses Alerts), Alerts (Projects Alerts), Alerts (Resources Alerts), and Creating an Account Storage Alert (Workspaces Alerts).

Allocation Grid

The allocation grid is a Custom Fields that allows you to automatically report on a percentage of a number, where the percentage is stored in the allocation grid, and each value/row in the grid becomes its own reporting column. Allocation grids can be helpful in several use cases, but typically only work for small customers because of the amount of maintenance they require and how they work in reporting. For more information, see the help topic Custom Field Types.

API

API stands for **A** pplication **P** rogram **I** nterface. SuiteProjects Pro provides both an XML and SOAP API.

Application Access

Application access provides the ability to access certain applications (Modules). This allows more generic roles to be setup and then control access to entire applications of functionality through the application access. An example of this is when employee is granted the ability to create invoices in their Role, but they are restricted from the Invoices application. This essentially deactivates any permissions the employee has through the role since the Invoices application is not available to them. For more information, see the help topic Access Control Overview.

Applications

See Modules.

Approval Process

Approval processes are available in the application settings of several different applications. Any process created in any of the applications settings, that is, timesheets or expense reports, is available on all approval areas for project or employee level approvals. For more information, see the help topic Approval Processes.

Assignment Group

An Assignment group is a list of employees that are available from all the active employees. Assignment groups allow you to assign several employees to projects or project tasks quickly and share reports to multiple employees efficiently. The effect is the same as assigning the employees individually to projects or project tasks or sharing reports to individual employees.

Assignment group functionality is useful when you have tasks that need to be assigned to a large number of employees such as on internal or administrative projects. In this case, you establish an assignment group that contains all company employees. Then you assign them through the assignment group to tasks such as training, vacation, and holidays. The hours set on an assignment group on a task can either be split evenly among the group or kept the same across each employee in the assignment group. Another use is where you may have a group of resources with similar skills and can be interchangeable on a project task. To avoid having to set up each resource on the task when they begin work, the assignment group provides a simple solution.

For more information, see the help topic Assignment Groups.

Attribute Set

Attribute sets allow you to designate a measurement of resources according to their skill set, education, or other custom characteristic. For more information, see the help topic Attribute Sets.

Authorizations

Authorizations request advance approval of future expenses. Employees create an authorization, enter future expenses, and request approval. To use this feature, your administrator must enable expense authorizations. For more information, see the help topic Authorizations.

Auto-Approve Rules

Auto-approve rules can be created for any approver in an Approval Process. They automatically approve items when the value of the parameter meets the criteria specified in the rule. For more information, see the help topic Approval Processes.

Back to Quick Links

B

Baseline

A baseline is a snapshots of a project and is used for variance reporting. For more information, see the help topic Project Budget List.

Billing

Billing provides the ability to create and run billing rules for generating invoice charges and billing forecasts. For more information, see the help topic Billing.

Billing Codes

A billing code is a free-text 2 digit field that may be used in the Invoices application for batch creation of invoice per billing code. Values set in the billing code field should be set according to policy within your company, if used. For more information, see the help topic Customer Billing Information.

Billing Rates

You can select how hourly Billing are determined. The options are: Service, Service / Customer, Employee, Employee / Project, Customer / Project, and Project billing rules. This is a global setting that controls all billing rates. Therefore, you cannot choose Service for one customer and Project billing rules for another. For more information, see the help topic Billing Rates.

Billing Rules

Billing rules define how customer invoicing is done and may drive revenue recognition. For more information, see the help topic Billing.

Booking

The default application terminology for the allocation of resources to projects is booking. The Resources application helps you collect and assign the resources your company has available for booking to specific projects, and even to tasks within those projects. The intention of the resource bookings is to properly assess a forecast of your company's resource needs. For more information, see the help topic Resources.

Booking Chart

The Booking chart allows you to see booking data in a visual chart. You should use it to get an overview of bookings for one or more employees. This view can be customized to show booking data according to different attributes. To update a booking from the chart view, click on a day/bar on the chart and the booking is opened up in the list. For more information, see the help topic Booking Chart.

Booking Request Layout

Use the Booking request layout form to create a form layout that meets your company's needs and helps employees request resources they need. For more information, see the help topic Booking Request Layout.

Booking Types

Booking Types provides you with the ability to group bookings or booking requests into distinct classifications. For example, a Hard booking type may indicate that the contract has been signed and a resource is needed for a specific time frame. While a Soft booking type can indicate that the contract has not been signed and the need is tentative. You can create booking types based on your company's needs and terminology. You should use booking types that align with a pipeline maturity or project lifecycle since updates are consistent with the state of the project or opportunity. For example, a proposed project with Soft bookings is signed and all bookings should be converted to Hard bookings. This requires a manual update. If you do not have the resources to maintain this data, then you may want to avoid using booking types. For more information, see the help topic Booking Types.

Budget

The Budget option in the Projects Module allows you to track project funding over time. Many projects require change orders or extensions to the existing project budget funding. When the budget functionality has been enabled in your company's SuiteProjects Pro account, you are able to identify individual funding items that make up the total project budget, such as statements of work (SOW) or purchase orders (PO). For more information, see the help topic Transactional Budget.

Budget Activities

Budget Activities are a way to identify various activities that are involved in obtaining the project funding. Examples include Initial Estimate, Proposal Provided, and Signed Contract. Individuals responsible for the activities can be defined on the Budget form along with the activity and the % allocation of funding to the type of activity completed. Allocation usage is typically for identification of commission payouts according to the compensation policy of your company. You are able to create as many activities as necessary. For more information, see the help topic Transactional Budget.

Budget Category

With Budget Category, you can specify what types of documents the funding is coming from such as a SOW, PO, or primary agreement. Another common definition of categories is the type of funding such as Fees, Expenses, and Maintenance. Enter a name for the category and any notes, if needed. The Budget category field on the Budget form displays a drop-down list of categories. For more information, see the help topic Transactional Budget.

Business Types

You can create Business Types to capture business type information for customers. This field is visible on the customer list and in reports. Definition of business types is related to how your company groups types of Customers. Examples are by vertical such as Healthcare and Education, or by industry such as Energy and Transportation. If business types are not defined, then the field does not display on the Customer form. Business types may be created or inactivated at any time. Inactive business types do not appear as a valid selection on customer forms. For more information, see the help topic Customers.

Back to Quick Links

C

Calculated Fields

In addition to standard fields, but you may find that there are other values you would like to track such as fields related to projects, employees, resources, and expenses to name a few. Or, there may be some standard value fields that you would like to rename for reporting purposes, using your company's terminology. To do so, you can create custom calculated fields and renamed built-in fields. For more information, see Custom Calculation.

Carrier

Carriers are the organizations that transport the purchases you order from your vendors to your company locations. You may want to specify the carrier you would like your vendor to use when shipping your purchases. The preferred carrier can be entered when creating POs. Frequently, you may have special arrangements with certain carriers. The use of carriers is only available in the Purchases application. For more information, see the help topic Carriers.

Cash Advance

The Cash advance field is available on each receipt to allow employees to note the amount of a cash advance provided by the company for the specific expense item. For more information, see the help topic Other Settings.

Charge Projections

Charge projection options provide forecasting of financials. Report values in Summary reports entitled Projected xxx are populated based on the charge projection settings. Charge projections are based on information derived from the project details and the billing rules set on the project. If no billing rules are set on the project record, no charge projections are generated for that project. The same principle applies to using revenue recognition projections. For more information, see the help topic Charge Projections.

Charge Stages

Charge stages separate time and expenses items into different phases or states within the Invoices application. There are two charge stages needed in SuiteProjects Pro: Open and Billed. You may create any number of charge stages in your environment based on your company's requirements. For example, you may create stages to indicate charges that are billable to the customer (for example, Billable or Chargeable) or not billable (for example, Administrative, Pending, or Overage). For more information, see the help topic Charge Stages.

Charges

A charge is a specific financial transaction incurred during a project for services performed, expenses incurred, or negotiated chargeback credits to be applied. Each time entry, expense entry and fixed fee rule is a charge. One or more charges can be combined to create invoices. For more information, see the help topic Invoices.

Client

See Customer.

Clone

In addition to using Project Templates, you can also **Clone** a project to copy project information from a current project to a new project.

Company ID

A Company ID uniquely identifies your company's implementation of SuiteProjects Pro. To sign in to SuiteProjects Pro you need three credentials: Company ID, User ID, and Password. See the help topic Signing In to SuiteProjects Pro.

Company Name

A company name is the official corporate name of a customer and is used on reports and invoices.

Company Switches

Account administrator can configure global settings and application settings to configure SuiteProjects Pro. These company-wide configuration settings or company switches impact all account users. For more information, see the help topic Administrator Guide.

Contact

A contact may be anyone your company wishes to track in SuiteProjects Pro. However, you must associate it with an existing customer.

One special type of contact is the Billing contact. Contacts designated as a billing contact are available for association on the project form. You also use them in the invoice process by including contact information in the invoice address section. If the billing contact has an email address, you may also choose to email invoices to the designated billing contact after the invoice has been approved.

For more information, see the help topic Contacts.

Continuation Menu

If there is not sufficient space to display the full menu bar then a continuation **...** drop down menu is displayed. For more information, see the help topic Navigating SuiteProjects Pro.

Cost Center

A cost center is a reporting and accounting tool to track costs related to expense receipts and user time entries. You can associate cost centers with the following entities: Customers, Projects, Tasks, Services, Time types, Expense Items, and Users. For more information, see the help topic Cost Centers.

Cost Transfer

A cost transfer feature is available in SuiteProjects Pro when this option is activated. Transfers are set up with a cost rate and bill rate function that allows the cost of an employee to be transferred to another cost center based on the projects worked. The use of the transfer feature is dependent on cost center setup including how cost center settings are inherited (that is, employee, project, or service) when an employee works on a particular project. When transfers are activated, it prevents the billing of resource project time using the invoice application for the employees and projects that have transfers set up. Projects not involved in transfer setups are not impacted. For more information, see the help topic Other Settings.

Cost Types

Cost types are part of the SuiteProjects Pro Project **Pricing** feature. When setting up a pricing scenario, the cost is computed based on an hours based estimate. Other cost items may be added by activating options within the pricing options form including: Other billable cost, non-billable resource cost, and non-billable expense cost. For more information, see the help topic Pricing.

Create Button

The Create button draws together all the content creation actions into a common area. The Create button is context sensitive. Click the button to display the Create New menu. For more information, see the help topic Create Button.

Currency

The currency displayed is the system default, but may be overridden to be any defined currency. The billing rule currency defaults to the currency set on the project.

SuiteProjects Pro supports multiple currencies for global companies. You are able to select the currencies that your company does business in. This allows invoicing in the currency of your customers as well as giving your employees the ability to input expense items in the currency in which they were incurred. For more information, see the help topic Currencies.

Custom Calculation

The Custom calculations option allows you to define additional value fields for specific objects. Custom calculated field values are only displayed in Summary reports. When selecting what type of custom calculated field to make, the drop-down selection under the New menu corresponds to the type of summary report the calculation will be found in after it is made. For example, if you select an Account-wide project custom calculation, the resulting calculation can be found when you create a report from the account-wide projects section of summary reports. You are also able to use custom detail fields as constants in Custom calculations. For more information, see the help topic Custom Calculations.

Custom Detail Field

The Custom detail fields option allows you to define additional value fields for specific objects. You can display Custom detail field values in Detail reports.

Custom detail fields allow you to create a new value field from standard value fields within a particular application. After a custom detail field is created and associated with an object, it cannot be changed to another object. You can bring custom detail fields in as separate columns in summary reports.

For more information, see the help topic Custom Detail Fields.

Custom Event Messaging

Form Permission Rules can be set to display custom error messages. Messages appear at the top of the form and are color coded according to the Severity of custom message setting. For more information, see the help topic Permission Rules.

Custom Fields

In addition to standard fields, you may find that there are other items you would like to track. To accommodate this, you can define additional fields for specific objects.

The difference between a Tag Group versus a custom field is that the tag group allows you to track the changes in historical values. A custom field only shows and reports on the current value, whereas an employee's change in tag group values are represented throughout any time range in reporting.

For more information, see the help topic Custom Fields.

Customer

Customers are those entities that drive business within your company. You can keep customer information basic or cover all information about the customer, depending on what other systems you may be using to track customer information. For more information, see the help topic Customers.

Customer Location

You can create and store customer location attributes at the customer entity level. You can then use these attributes for reporting. Sample customer locations could be by state, by city, by country or any customized list of values. For more information, see the help topic Customer Locations.

Customer POs

Customer POs are funding documents for projects or purchases. Customer POs may be associated with a project then assigned to the project billing rules for the tracking of balances. There may be one or more POs associated with a project. As such, customer POs are created for a specific customer. A customer PO may encompass multiple projects. A customer PO can be used in conjunction with Agreements, independent of agreements, or not at all. A customer PO can be set on a billing rule, so that charges are charged against a specific Customer PO. To set a Customer PO on the billing rule, you must first associate it with the project record on the project Properties form. For more information, see the help topic Customer POs.

Customer Sizes

You can create Customer Sizes records to capture customer size information. This field is visible on the customer list and in reports. Definition of customer sizes is generally interpreted in terms of employees or revenue. Examples are less than 100, 101-500, 501-1000 if employee based, or less than $500K, $1M-$5M if revenue based. If customer sizes are not defined, then the field does not display on the Customer form.

Customer sizes may be created or inactivated at any time. Inactive customer sizes do not appear as a valid selection on Customer forms. For more information, see the help topic Customer Sizes.

Customer Sources

You can create customer Sources to capture customer source information for customers. This field is visible on the customer list and in reports. Definition of customer sources is generally interpreted as how the customer was obtained. Examples are referral, marketing campaign, trade show, cold call, etc. If customer sources are not defined, then the field does not display on the customer form. customer sources may be created or inactivated at any time. Inactive customer sources do not appear as a valid selection on customer forms. For more information, see the help topic Customer Sources.

Back to Quick Links

D

Dashboard Module

The Dashboard module is essentially a home base that is meant to convey critical information to users such as messages and reminders of pending approvals. It also contains various wizards, which help you quickly update data. You can mount reports onto the dashboard for quick access to saved reports. You can enable a graphical reporting dashboard to represent saved reports in forms such as pie charts and line graphs. While this is helpful, not all reports lend themselves to graphical representation. For more information, see the help topic Homepage and Dashboards.

Data Access

The access to data in SuiteProjects Pro is controlled by assigning Filter Sets. For more information, see the help topic Filter Sets Overview.

Deal

Deals are the primary object in tracking pipeline opportunities when using the Opportunities application. Deals may be matured to include estimates and can result in a proposal in the Opportunities application or project in the Projects application. For more information, see the help topic Opportunities.

Deal Stages

When creating a Deal, a standard field on the deal form is the Deal Stage. Deal stages can be defined per your established sales process to track maturity of an opportunity in the pipeline. For more information, see the help topic Deal Stages.

Demographic

The Employee Demographic form includes information about the employee and SuiteProjects Pro user, including user settings controlled by account administrators. See the help topic Demographic.

Department

A department is a grouping of users based on distinct criteria. The criteria can be defined based on your company's requirements. You can also use Departments to grant group access privileges and create customized approval procedures. For more information, see the help topic Departments.

Dimension

In reports, a dimension is a text field available for filtering and grouping. Dimensions include customer names, ID numbers, or job codes. For more information, see the help topic Reports.

Dividers and Sections

You can create a section and divider line when you create or modify a custom field. For more information, see the help topic Dividers and Sections.

Back to Quick Links

E

Earned Valued Calculation

Earned Value Calculation allows companies to view the summary of the planned value of completed work expressed in terms of the budget authorized for that work. The Earned Value (EV) is the percentage of the planned work that has been completed, multiplied by the budgeted cost at completion. You can calculate the EV with two methods. The first method **Weighted by cost** that the EV will incorporate user cost into the percent complete calculation. The second method **Unweighted** by cost that the value will be equivalent to the percent complete for the entire project and will not include user cost. See the help topic Other Settings.

Earned Value Management (EVM) Metrics

Earned Value Management metrics allow companies to have increased visibility into project status and profitability. Using data from planned and completed work, managers can readily assess the state of their projects. Schedule and cost metrics provide valuable understanding about the health of your projects. The EVM metrics include: Planned Value (PV), Actual Cost (AC), Earned Value (EV) as a monetary value, Earned Value (EV) as a percent complete value, Budget Variance (BV), Cost Variance (CV), Schedule Variance (SV), Cost Performance Index (CPI), Schedule Performance Index (SPI) and Critical Ratio (CR). See the help topic Other Settings.

Education

Education represents the level of education an employee resource has attained. It is one of the standard Resource Profile elements. The Education link only displays if you have activated this as a Resource profile option. For more information, see the help topic Education.

Email Template

You can create many email templates associated with Modules. They can also be customized if additional information is needed to be displayed within the email. See the help topic Email Templates.

> **Note:** You should use Notifications instead of email templates.

Envelope

See Expense Report.

Exchange Manager

SuiteProjects Pro Exchange Integration Manager provides the ability to export project task assignments, resource bookings, and schedule request calendar commitments from SuiteProjects Pro to users' Outlook calendars. See the Exchange Integration Manager for details.

Exchange Rate

You can override the current exchange rates in SuiteProjects Pro. If a company overrides a current currency exchange rate, then the company rates is used for all transactions. Advanced exchange rate override options are available to control time-related exchange rates such as different rates for past periods, the current period, or future periods. For more information, see the help topic Viewing Exchange Rates.

Expense Items

Expense Items are receipts, tickets, statements or other items that contain costs incurred by an employee and are entered into an Expense Report per your company's policies and procedures. The expense items are classifications or categories of these costs. Some examples are: Airfare, Lodging, Mileage, and Business Meals. Some expense items are predefined, but you can modify these and create new items to meet your company's needs. For more information, see the help topic Expense Items.

Expense Report

An expense report (or envelope) consists of one or more Expense Items identified by an employee for reimbursement. For more information, see the help topic Expenses.

Expense Report Layout

You can tailor the Expense report layout to meet your company's needs. Since this report form may be routed for review and approval internally, the layout should clearly communicate the expenses that have been incurred. You are able to select the Date format, Starting tracking number, and Grid style. These settings determine the numbering of created Expense reports and the basic style of the expense report. For more information, see the help topic Expense Report Layout.

Expenses Module

The Expenses module captures expense reports and accompanying receipts. It also allows for authorizations of anticipated expenses. Depending on a company's needs, users can enter expenses for a week or any duration. They are prompted to enter a start date, description, and notes. As is the case with all fields on all forms, you can mark the description and notes fields as required. Users also have the option of saving an attachment to an expense report such as a scanned receipt or a receipt within the expense report. For more information, see the help topic Expenses.

Back to Quick Links

F

Field Settings

Field Settings within Form Permissions allow access to and control of fields within the associated entity form. Field level settings are set based on a user's role. These Field Settings are universal for the form's associated entity. For more information, see the help topic Field Settings.

Filter Sets

A filter set provides access privileges to users based on their role in the organization. Filter sets can limit access to the following items: Customers, Projects, Services, Users, Expense Items, Charge stages, and Project stages. Filter sets are a powerful tool to allow users to see the same entities, but customize the data that is accessible. They limit what data a user can see in SuiteProjects Pro. For more information, see the help topic Filter Sets Overview.

FOB

F.O.B. means Freight On Board. F.O.B. locations are an indication of which party, purchaser or vendor, is responsible for the shipping and loading costs. It may also refer to where the liability for damage goods resides. For more information, see the help topic F.O.B Locations.

Forgotten Password

If you've forgotten your log-in information, click **Forgot your password or ID?** on the sign-in page. See the help topic Signing In to SuiteProjects Pro.

Form Default Values

Form default values can be set to establish common values that prepopulate forms for new projects, new tasks, new timesheets, and new receipts. Values can be set for specific roles, so the role of each user would dictate which values are defaulted. If the defaults apply globally, they may be applied to all roles. Defaults can be set for a variety of fields, including custom fields. For more information, see the help topic Form Default values.

Form Permission Rules

Permission rules allow administrators to conditionally control which fields they capture on many entity forms. Selection of field values can dynamically control other fields on a form. You can apply this functionality to both standard fields and custom fields. When a field is selected on a form, it can prompt an action on other fields. For more information, see the help topic Permission Rules.

Form Permissions

Form Permissions provide specific field access on certain forms, as defined by the Administrator. The Role/Filter set matrix can be then further limited by the individual form permissions that are setup per each role. Form permissions may be set on almost every form and can only be configured by account administrators. See the Tips area below a form for a Modify the form permissions link to see if permissions may be controlled through form permissions. For more information, see the help topic Form Permissions.

Form Signposting

Form signposting uses info tips and color highlighting to help you to keep your bearings when navigating complex forms. For more information, see the help topic Forms.

Back to Quick Links

G

Gantt

Project plans may be complex and long. There may be a need for project managers to adjust tasks by moving them up or down in the timeline of a plan. The Gantt view provides visibility into the progress of a project, as well as the ability to easily re-order tasks and phases leveraging up/down arrows. For more information, see the help topic Outline, Gantt, and Task Detail Views.

Generics

Generic records are virtual or placeholder employee resources that represent a staffing need. Often, generic resources align with job codes defined in the company since job codes tend to align with skills.

After you have defined generic records, you can use them in bookings or booking requests within the Resources Module. A generic record can also be used for booked utilization forecasting or as assigned resources on projects and tasks for assigned utilization. If booking requests have been enabled in your environment, there is a switch that can be enabled to require a requestor to ask for a generic resource instead of a specifically named resource.

If a project is being planned or has started, the project manager may need to assign a resource to project tasks to develop a full resource plan. Generics may be used if the project manager or requestor knows the type of resource but not the specific individual. Generic resources cannot record time or expenses and can only be used in a forecast capacity.

For more information, see the help topic Generics.

Global Setting

A global setting is applied to all users, depending on their Role, Form Permissions, and Filter Sets. For more information, see the help topic Administration – Global Settings.

Guest

A guest is a customer who is able to sign in to SuiteProjects Pro and view the application data that is associated with them. Guest settings include the following: Guest can view Project Gantt charts, Guest can view Project outlines, Guest can view task details in Gantt/outline views, Guest can view Invoices, Guest can view Workspaces, and Guest can customize lists. For more information, see the help topic Guest Roles and Guests.

Back to Quick Links

H

Hieracy

A hierarchy is used to create hierarchal classification trees with users, customers, and projects. A user, project, and customer can only belong to one node at any given moment within a hierarchy, but can belong to multiple hierarchies at the same time if multiple hierarchies exist for a record. A user project, and customer can also be moved between nodes with a hierarchy.

Hierarchies are used for subtotaling and filtering within Summary reports. For example, you may create a customer hierarchy based on geographical location that associates each customer with an office location such as a city. You could also create a two level hierarchy: city and state. Each level may have multiple nodes. The state level can have Texas, Georgia, and Washington. Or, at the city level you could have Seattle, Austin, Dallas, and Atlanta. Each city level node has a parent node such as a state. By assigning customers to a city, they are automatically also associated with the state.

For more information, see the help topic Hierarchy.

Back to Quick Links

I

Industries

Industries can provide you with a snapshot of which resources are suitable for a particular project. It is one of the standard Resource Profile elements. The Industries link only displays if you have activated this as a Resource profile option. For more information, see the help topic Industries.

In-Form Notifications

In-Form notifications provide clear feedback on user actions without the need for popup windows. They are particularly valuable for correcting data input errors. Errors are reported in a list with clickable links and instructions. Click on the links to be taken directly to the source of the error. For more information, see the help topic User Guide.

In-Form Popups

In-Form popups have all the advantages of conventional popup windows, but appear as part of the form. This allows you to block popup windows and still use all the SuiteProjects Pro functionality. For more information, see the help topic User Guide.

In-Module Navigation

The second menu bar which allows users to go to the specific functionality provided by the selected module. See the help topic Using the Main Menu.

Integration Manager

SuiteProjects Pro Integration Manager is a quick and efficient way of exporting data from or importing data to a SuiteProjects Pro account. It facilitates an exchange of data with other software applications such as accounting systems and payroll programs. Integration Manager is an import, export, and data update application specifically designed for use with SuiteProjects Pro. See the Integration Manager for details.

Internal Switches

Internal switches are set by SuiteProjects Pro Professional Services when your SuiteProjects Pro account is configured. Account administrators can request that an internal switch be enabled in your account to turn on new functionality. For more information, see the help topics Enabled features and Optional Features.

Invoice

An invoice consists of one or more line items (or charges) identified for billing to a particular customer. For more information, see the help topic Invoices.

Invoice Layout

An invoice layout defines the way an invoice sent to a customer will look. It defines the information displayed on the invoice as well as company logo and appearance. For more information, see the help topic Invoice Layouts.

Invoice Prefix

The Invoice prefix allows you to define a prefix for the customer, which will allow sequential numbering based on the value of the prefix. This provides customer level or ownership level invoice numbering. For example, if a set of customers is uniquely owned by an office or country, you can set an invoice prefix on all of these owned customers to ensure the invoice numbering is sequential for the country or office. For more information, see the help topic Customer Billing Information.

Invoices Module

The Invoices module handles financial transactions such as customer charges and invoices. Primarily focused on invoicing your customers, the Invoices module manages the results of running the billing rules that you can set up for projects in the Projects module. For more information, see the help topic Invoices.

Issue

The Issue functionality provides you with the ability to maintain and manage issues encountered on projects. There are several components that are available for the configuration of an issue as well as the tracking needs defined by your business requirements. For more information, see the help topic Issues.

Issue Category

Issue Categories indicate the areas within a project that are impacted by the issue or the type of issue identified. The category may be at a high level such as Issue or Risk. They may also be at a more defined level such as Documentation, Product, Usability, and Training. You can also add notes describing the issue category. Issue categories may be inactivated and reactivated at any time. For more information, see the help topic Issue Categories.

Issue Severity

Issue Severities designate how serious or critical the issue is in terms of impacting a deliverable, the project plan or other key elements of the project. Possible values could be Low, Medium and High or use of a numeric scale (for example, 10 is severe impact and 1 is slight impact). You can also add notes describing the issue severity. Issue severities may be inactivated and reactivated at any time. For more information, see the help topic Severities.

Issue Source

Issue Sources identify the person, team, or area that submitted the issue on the project. Examples are: Project Manager, Team Member, Customer Lead or Test Results. The issue source provides another filter and reporting option for classification of the issues reported. You can also add notes describing the issue source. Issue sources may be inactivated and reactivated at any time. For more information, see the help topic Sources.

Issue Stage

Issue Stages designate where the issue is in the resolution process. Sample stage values could include: Open, Assigned, On Hold, In Work and Resolved. You can select through check boxes whether this stage is the default assigned to new issues and whether issues are considered closed when in this stage. Typically an Open stage is selected as the default for new issues and the Resolved stage is selected as the stage for issues to be considered closed. You also designate where the stage value displays in the list of issue stages. A notes field is available for issue descriptive material. For more information, see the help topic Stages.

Issue Status

Issue Statuses provide a means to identify the overall health of the issue resolution. Sample statuses are: Red (critical), Amber (on watch list) and Green (no known problems). You can enter as many status values as are necessary for your company's needs. Using the sample values noted above, a Red status would mean that the resolution of the issue is serious in nature and can impact project timelines. An Amber status might mean the solution to the issue should be monitored to avoid impact to the project.For more information, see the help topic Statuses.

Back to Quick Links

J

Job Codes

Job codes classify employees into general job positions defined by your company. Job codes are not necessarily job titles at the company. They are normally used as a type of employee that you bill out to a customer. You can give job codes a generic cost for calculating estimated margins without named resources. You can also give job codes a bill rate within a rate card. For example, you may create a Project Manager, Consultant, and Engineer job code. Generic resources may be associated with a job code to inherit rates for forecasting purposes. For more information, see the help topic Job Codes.

Job Roles

Job roles provides an ability to track past job experience by role. It is one of the standard Resource Profile elements. The Job roles link only displays if you have activated this as a Resource profile option.

The Job role can be a job title or can define job duties or responsibilities. Job role definitions are not related to Job Codes or user Roles.

For more information, see the help topic Job Roles.

Back to Quick Links

L

Leave Accrual

Leave accrual is a feature focused on tracking leave balances such as vacation and sick time. The feature can track a leave accrual based on the Leave Accrual Rules setup according to your company policies. For example, a vacation balance may be refilled one time a year or accrued each month at a certain rate per the employee's seniority in the company. A leave balance draw-down is based on time entries against the specific projects or tasks. For example, taking vacation or sick leave adjusts the leave balance. See the help topic Leave Accrual Balance and Transactions.

Leave Accrual Rules

Leave accruals rules provide a structure around how time off is handled, that is, vacation and personal time off. First, you set up Leave accrual rules to document each type of time off accrual your company recognizes, and then you associate them to individual employees that receive that benefit within the company. See Leave Accrual Rules.

Limit Value Lists

Form Permission Rules can be created to limit the values displayed in a list on the form. You can restrict the values displayed for a field based on the selection of another field. See Form Permission Rules.

Line Item

Charges approved for billing to a customer become the line items on an invoice.

Loaded Cost

You are also able to store three levels of loaded costs: primary, secondary, and tertiary. These costs can be used in detail and summary reporting. For more information, see the help topic Cost.

Locations

Locations specify where an employee resource lives or what office they are assigned to. It is one of the standard Resource Profile elements. The Locations link only displays if you have activated this as a Resource profile option. See Resource Profile.

Many customers require resources that are located near their project site to reduce expenses. Define the locations as is appropriate for your company and your resources. Locations can provide an additional search and reporting capability.

See the help topic Locations.

Lockout

Lockout is a security feature that ensures users have an active account and have knowledge of the password to access SuiteProjects Pro. For more information, see the help topic Employee Lockout.

Log In

To sign in to your SuiteProjects Pro account, go to `https://auth.netsuitesuiteprojectspro.com/login` and enter your Company ID, User ID, and Password. See the help topic Signing In to SuiteProjects Pro.

> **Note:** OpenAir is now SuiteProjects Pro. As of 5 a.m. Eastern Time (UTC–5) on January 25, 2025, for your sandbox account, and on February 15, 2025, for your production account, service URLs with the `netsuitesuiteprojectspro.com` domain name replace URLs with the `openair.com` domain name.
>
> For your production account, the sign-in page URL now is `https://auth.netsuitesuiteprojectspro.com/login`. After signing in, you are redirected to an account URL with the `netsuitesuiteprojectspro.com` domain name. Any links or bookmarks to sign-in page or account URLs with the `openair.com` domain name redirect to the SuiteProjects Pro sign-in page, even if you have an active SuiteProjects Pro session in a different browser tab.
>
> For more information about the change, see the help topic Introducing SuiteProjects Pro (Action Required).

Log In As

When you select **User Menu > Log in as**, a list of users you have been granted permission to sign in as displays. To sign in or proxy in as another user, click on the user name and a new instance of SuiteProjects Pro opens in a new tab so you can perform a function for the proxied user.

> **Note:** This option is only available if you are an authorized proxy for at least one other user.
>
> If you proxy in as another user, the top bar shows the initials of that user on a red color background, even if the user has a profile picture.

Log Out

The Log out menu option closes your SuiteProjects Pro session and redirects you to the sign-in page. Closing your browser session at any time when signed in to SuiteProjects Pro will also log you out and cancel your session.

Back to Quick Links

M

Main Navigation

The top menu bar which allows users to go to the available modules. See the help topic Using the Main Menu.

Manufacturer

Manufacturers is a feature that is only available in the Purchases application, however, it is not a required record in the Purchases application.

Establish manufacturers so that you can associate them with products to ensure the products are purchased from the manufacturers your company selects. For more information, see the help topic Manufacturers.

Measure

In reports, measures are numbers which can be used in calculations (added to, subtracted from, or summed, for example), and include counts, totals, or custom calculations.

For more information, see the help topic Reports.

Modules

SuiteProjects Pro contains various modules, which are designed around specific functional areas such as Projects, Timesheets, Expenses, and Resources. The way these modules operate in your environment is dependent on the business needs of your company. See the help topic SuiteProjects Pro Applications.

Multiple Currencies

You need the multiple currencies feature to invoice in multiple currencies, or if you have rates and costs in multiple currencies. When the multiple currencies feature is used, a default currency is assigned to each user. Foreign currency receipts can be entered in any currency and will be converted to the user's currency in the expense report. For more information, see the help topic Currencies.

Multiple Sessions

You may have multiple sessions of SuiteProjects Pro running on the same computer at the same time. This is helpful when you are using multiple applications since it saves data entry time by avoiding switching to different applications within the same instance.

Multi-week Timesheet View

Multi-week timesheet view is set from User Menu > Personal Settings > Timesheet Options > Display all weeks for timesheets containing multiple weeks. For more information, see the help topic Timesheet Options.

Back to Quick Links

N

NetSuite Integration

NetSuite integration provides a seamless data flow between SuiteProjects Pro and NetSuite so that financial and project management operations improve and users of both systems gain visibility into services delivery, billings, and expenses. The integration uses a simple process for data exchange that allows you to maximize time, effort, and ensure data accuracy as information is entered one time and shared between systems. For more information, see the help topic NetSuite Integration.

News Feed

The Project Status News Feed allows you to add, update, and display project status messages to keep project stakeholders informed. When this feature is enabled, a "News Feed" icon is added to the header of your projects or Project QuickViews. Click this icon to open the Project Status News Feed, where you can add status updates to your project or read existing updates. For more information, see the help topic Project Status News Feed.

Nickname

A nickname is a shortened version of the company name that is used to save space on page views in SuiteProjects Pro. The nickname does not appear on invoices. However, it does appear on formatted application reports such as Timesheets and Expense reports.

Notifications

Account administrators can configure the automatic sending of email notifications to designated users based on various events. For more information, see the help topic Notifications.

Back to Quick Links

O

SuiteProjects Pro Mobile

SuiteProjects Pro Mobile lets you create, submit and keep track of your timesheets and expenses from your mobile device. The app is available as a free download from App Store (iPhone and iOS devices) and Google Play (Android devices). See the help topic Mobile for details.

Opportunities Module

The Opportunities module allows you to manage prospective new business for your company with existing customers as well as with new customers and prospects. You are able to create Deals, Estimates, Proposals, To dos, and Events within the application. Many companies now use the NetSuite integration for this functionality. See the help topic Opportunities or contact SuiteProjects Pro Support and request information about the NetSuite integration.

Overlapping Timesheets

The necessity for overlapping timesheets is typically driven by the need to enter either a correcting timesheet to move hours between projects or to enter two timesheets within a given week (For example, your company is on a monthly accounting calendar but you have weekly timesheet submissions. You can create two timesheets for the timesheet period, one ending on the last day of the calendar month and the other beginning on the first day of the next calendar month). Disabling timesheet overlapping ensures unique timesheets for each timesheet period.

Back to Quick Links

P

Password

A password is used to ensure the security of your account. To sign in to SuiteProjects Pro you need three credentials: Company ID, User ID, and Password. See the help topic Signing In to SuiteProjects Pro.

Password Hint

You should setup a password hint in case you forget your password. The ideal hint should clearly remind you of your password, but do not enter a hint that would make it easy for anyone to guess your password. The password hint will be sent to you by email if you use the Forgotten Password feature. See the help topic Signing In to SuiteProjects Pro.

Payment Terms

Payment Terms are the conditions, generally the time frame, under which an invoice is expected to be paid by the purchaser of the goods and services. Common terms are: Upon Receipt, Net 30 days and Net 45 days. Any number of payment terms may be created per your company's policies. Generally these terms are specified in contracts or primary agreements between the provider and the customer. For more information, see the help topic Payment Terms.

Payment Types

Payment Types are an optional feature and can be set up in the Expenses and Invoices spplication settings. This functionality allows you to select a payment type such as Cash, Credit Card, or Check on a receipt in the Expenses application or on an expense charge in the Invoices application. For more information, see the help topic Payment Types.

Payroll Integration

You can integrate SuiteProjects Pro with the following payroll systems: Ceridian PowerPay, Paychex, ADP-PCT and ADP-NobleStar. This is an optional service providing your company subscribes to the payroll systems. See the help topic Optional Features.

Payroll Types

You can create Payroll types for use in the Timesheet application. This is an additional attribute that can be input on the time entry. The general use is to determine regular or overtime work when time types are used for a different purpose. Payroll types have more limited functionality than time types.

Payment types are primarily used by your Accounts Payable or Accounting group to indicate how items were paid for by employees as this may determine the categorization of expenses in the accounting system. An example is a company credit card, which indicates the Accounting organization may need to issue a payment to the credit card company instead of the employee, depending on your company's policy regarding use of the credit card. Some payment types are predefined, but you can modify these and create new items per your company's needs.

For more information, see the help topic Payroll Types.

Pivot Table

A pivot table allows you to reorganize and summarize selected columns and rows of data to obtain a desired report.

Placeholders

Placeholders are variables you can place into the body of an email message. The placeholder is then replaced with a value read from the SuiteProjects Pro database when the email is sent. A placeholder consists of a field name surround by %% characters, for example `%%name%%`. For more information, see the help topic Notifications.

Portlet

The Home and Dashboard pages are organized as a set of portlets. Each portlet type is color coded and can be moved and resized according to your needs. You will find all of the Dashboard functionality encapsulated within these portlets. For more information, see the help topic Homepage and Dashboards.

Pricing

Pricing is an estimation feature for displaying gross/net revenue and estimated margins. For more information, see the help topic Pricing.

Product

Products are items you purchase from vendors. A product must exist to use the Purchase request or PO functionality within the Purchases application. Products may also be rebilled or invoiced to your customer and therefore need to be available as a type of billing rule on projects and also as a revenue recognition rule in the Projects application. They also may be used as a invoice charges in the Invoices application. For more information, see the help topic Products.

Progress Bar

A progress bar combines a quick visual indication of completed status together with the numerical value.

Project

Project refers to all of the components that describe work to be accomplished such as what will be done, when, by whom, and at what cost. Since SuiteProjects Pro terminology can be tailored by each company, your SuiteProjects Pro account may use a different term in place of the word project such as case, job, or assignment. For more information, see the help topic Projects.

Project Billing Defaults

When using project billing rules, you may set a global project billing defaults option for running billing rules and sending results to a defined individual. The default settings for new projects include: Do not auto-bill; Run a trial billing, do not create project billing transactions or charges; Run billing and create project billing transactions and charges. You can create a list of employees to email results of the auto-bill run to and you can schedule the billing option to run at a defined day and time. Optionally, you can suppress the email if results do not include billable items. For more information, see the help topic Project Billing Defaults.

Project Billing Rules

Project billing rules provides the most flexibility in billing the customer. You can create billing rules for every project based on the terms of the particular contract or statement of work. You can use hourly billing rates, fixed fee, and receipt based billings. See the help topic Billing.

Project Locations

Project Locations store location information within the project entity. These attributes can then be reported on. Examples of project locations are state, city, country or any custom list of values. For more information, see the help topic Project Locations.

Project Stages

Project Stages classify projects based on your company's needs. For example, you may create Proposed, Active, Closed, Lost, and Internal stages. After you have created the stages, you can assign individual projects to the appropriate stage. For more information, see the help topic Project Stages.

Project Status Summary (PSS)

Use Project Status Summaries to produce easy-to-read project status pages which summarize important project progress data. You can customize the project status summary, and you can populate it with information critical to your company internally or your customers externally. For more information, see the help topic Project Status Summary (PSS).

Project Status Summary Portlet

A Project Status Summary portlet is a window within a Project Status Summary that you can customize. Portlets can show information about tasks, task assignments, bookings, and other project- and task-related information. For more information, see the help topic Project Status Summary (PSS).

Project Status Summary (PSS) Portlet Item

Project Status Summary portlets may include several portlet items which include specific information related to the portlet. For example, the a Profitability portlet may have three portlet items: Total Income, Incomve vs. Budget, and Total incurred costs.

Portlet items can be rearranged when in PSS' edit mode. For more information, see the help topic Project Status Summary (PSS)

Project Task Types

Project task types are useful in task assignments, time entries, receipts, and charges. They are important in the calculation of utilization and also help filter hour-related data in reports. When time is recorded against tasks with a defined task type, the task type is stored with the time entry record. You can display and filter the task and task assignment detail reports by project task type. You can also sub-total and filter Summary Reports and Advanced Resources reports by task type. The task type provides the ability to label individual tasks on a project. You can create as many types ass you need to accommodate your company's specific time tracking requirements. For more information, see the help topic Task Types.

Project Templates

Many companies create a Templates project stage. Templates are predefined project structures that you can use to simplify project creation by having employees copy the template when creating a project instead of starting from a blank project. For more information, see the help topic Project Stage Use Case: Project Templates.

Project Connector

SuiteProjects Pro Project Connector is a tool for exchanging project plan information between the Projects module and Microsoft Project. See the help topic Projects Connector for details.

Projects Module

The Projects module is where the management of your company’s projects takes place. The application is flexible and provides several features to address your company’s needs. For more information, see the help topic Projects.

Proposal Layout

Proposals generated in SuiteProjects Pro are built by adding various proposal components such as text items, hourly items, and fixed fee items. Together these components make the proposal a report that can be mailed directly to customers for review and acceptance. For more information, see the help topic Proposal Layout.

Prospect

A prospect is a potential customer against which deals are being proposed. Prospects are only used in the Opportunities application and may be converted to customers at a later stage. The information captured for prospects is similar to that of customers without the information regarding billing. For more information, see the help topics Customers and Opportunities.

Proxy

A proxy is a person authorized to act on behalf of another user. Proxy settings allow a user to sign in to SuiteProjects Pro as another user with a single click and no knowledge of the other user's password. For more information, see the help topic User Proxy Overview.

Proxy Expiration

Proxy expiration allows you to control how long a proxy can be active or used. This feature is useful when setting up a proxy for an employee covering another employee's tasks while they are on vacation or on leave. Enabling this feature requires you to identify the default proxy expiration. If this feature is active and No expiration is set as the default, then the proxy setup functions as if the expiration feature was turned off. This may be overridden for each proxy set up within an employee account. If an expiration date is set up with the proxy, the expiration happens at midnight of the account time zone leading up to the date that is set. For more information, see the help topic Proxy Expirations.

Purchases Module

The Purchases module provides the ability to create a process flow from a purchase request to fulfillment and receipt, and allows for the tracking of purchases made within your company. For more information, see the help topic Purchases.

Back to Quick Links

Q

Query Related Data

Form permission rules can be created based on the relationship between fields. When defining Form Permission Rules, you can choose to query related data for the rules value on the right hand side (either choose to populate the static field or choose to look up a related field). For more information, see the help topic Permission Rules.

Back to Quick Links

R

Rate Card

A rate card is used to define bill rates for a group of job codes. You can use rate cards to determine billing rates in Project Billing Rules as well as Project estimating based on job codes. You can create multiple rate cards, which is helpful if you negotiate different bill rates per job code, per customer. For more information, see the help topic Rate Cards.

Receipt Policy

Receipt policy controls actions based on the individual receipt and expense item entered into an expense report. You are able to enter parameters for the receipt and select whether to require notes or approval based on the settings. You can also set limits for allowing per diem expense item in expense reports. For more information, see the help topic Expense Items.

Receipt Rule

A receipt rule determines which receipts within expense reports are assigned to the cost center. Receipt rules can be set by Customer, Project, Task, Expense Items, and User. You can then chose multiple selections.

When an employee creates and saves an expense report, the associated expense item is checked against the receipt rule selections. If a receipt matches a selected item that is associated with a cost center, the cost center is assigned to the receipt. If no item is found, then no cost center is assigned. For more information, see the help topic Cost Centers.

Receiving Location

Receiving locations are for your company's shipping addresses. Your company may have multiple addresses it ships to, which could be each location/plant, a regional distribution center, or possibly a third party facility such as a manufacturing plant receiving parts.

Receiving locations are distinct from accounts payable locations since the purchase may be shipped to a plant location while the invoice should be sent to the regional office for accounts payable processing. Receiving locations are only available in the Purchases application. After they are created, you can choose the appropriate receiving location when creating the PO so that the vendor can ship the purchase to the correct shipping address.

For more information, see the help topic Receiving Locations.

Recognition

Recognition provides the ability to create and run recognition rules for generating revenue transactions and forecasting revenue. For more information, see the help topic Revenue Recognition.

Record Navigation

The fourth level of navigation is specific to a particular record within a page. For example, a specific booking record may have navigation options for editing, submitting, or approving the booking. See the help topic In-Record Navigation.

Report Editor

The Report Editor allows you to edit and create reports using drag-and-drop functionality, instant previews without navigating to other pages, and other user-friendly features. For more information, see the help topic Report Management and Editor.

Report Management

The Report Management interface allows you to quickly search for and preview saved reports and report templates which best fit your needs. Search results are given ratings by popularity. For more information, see the help topic Report Management and Editor.

Reports

The Reports provides users the ability to create and run a wide variety of reports based on your company's configuration. For more information, see the help topic Reports.

Resizing Timesheet Columns

When this feature is enabled, point to the edge of a column header and drag the column edge to the required size. The new column size will be remembered. For more information, see the help topic Timesheet grid.

Resource Profile

The Resource Profile Options form provides the foundation for relating all Resource Profile elements together to define a complete skill database. Each row controls a dimension of the resource profile. For more information, see the help topic Consolidated Resource Profiles.

Resources Module

The Resources module allows you to schedule resources to projects. It also provides a vehicle to store a user's skill set, education, industry experience, job roles and location in the SuiteProjects Pro database. You can then search the database to find the right resource. For more information, see the help topic Resources.

Retainer

When a customer provides payment in advance, you can create a retainer and apply some or all of the payment against an invoice. When you create a new invoice for this customer, the available retainer balance will display. For more information, see the help topic Invoices.

Revenue Types

Revenue types are part of the SuiteProjects Pro Project **Pricing** feature. When setting up a pricing scenario, the revenue is computed based on an hours based estimate. Other revenue items may be added by activating options within the pricing options form including: Investment absorption, Other gross revenue, and Pass through revenue. For more information, see the help topic Pricing.

Roles

A role defines what a user can do in SuiteProjects Pro. The role setup designates what rights and privileges are available to users with the specific role. This includes what applications the user can access as well as whether they can view, modify, or create various records within SuiteProjects Pro. For more information, see the help topic Roles Overview.

Back to Quick Links

S

Saved Report

Saved Reports are customized reports that you or others in your company have created in SuiteProjects Pro. These are used in the charts and graphs you display in the Home module.

Schedule

The Schedule link displays within the employee record after the Employee Demographic form has been saved. The user inherits the default calendar as set up in Work Schedules. Change the setting to the appropriate calendar for the user and enter any exceptions to employee work schedule. For more information, see the help topic Schedule

Services

Services are specific economic activities that you offer to customers that you use to invoice them. A Service can be set up to bill at an hourly rate; a set amount per day, or week, or month; or may be set as a flat rate. Services are available in the Timesheets, Projects (tasks, billing rules, and recognition rules), Invoices, and Opportunity applications. For more information, see the help topic Service.

Setting

The Personal setting page provides a wide range of options that you can set to make your work more convenient. For more information, see the help topic Personal Settings.

Sidebar

The sidebar provides quick access to the most frequently used tools. The sidebar contains the Create Button and Tips Button. For more information, see the help topic Using the Main Menu.

SOAP

SOAP stands for **S** imple **O** bject **A** ccess **P** rotocol. SuiteProjects Pro provides SuiteProjects Pro Web Services as a layer for the exchange of SuiteProjects Pro data between the main site and peripheral programs. SuiteProjects Pro Web Services are based on Simple Object Access Protocol (SOAP), an XML-based convention. For more information, see the help topic XML API and SOAP API.

Split Task

The Split Task functionality lets you include breaks part way through a project task. You can split the task into periods when work will be done (hours are assigned to resources) and break periods when no work will be done (no hours are assigned to resources). The task duration or the percentage of assigned resources time is recalculated automatically in function of the break periods and the planned hours for the task. For more information, see the help topic Frequently Asked Questions under the Projects chapter in Administrator Guide.

Submission Rules

See Timesheet Rules.

SuiteAnswers

Access SuiteAnswers from **User Menu > Support** for support, training, and documentation inquiries. SuiteAnswers provides searchable access to support solutions, best practices, training videos and technical documentation. See the help topic Getting Help.

Switches

The term "switch" or "switches" has been historically used to refer to SuiteProjects Pro account configuration settings and to some user settings. Some SuiteProjects Pro account configuration settings (switches)are controlled by account administrators (Company Switches), others are set by SuiteProjects Pro Professional Services during the initial implementation and controlled by SuiteProjects Pro Support (Internal Switches).

Back to Quick Links

T

Tag Group

The Tag group functionality allows you to create specific subgroupings of items such as a subgroup of users. This is useful if you need to report on a group of items that is a subset or may cross several values in a particular entity. For example, using the Department may be too large of a group for your particular need and the tag group is able to pare down the selection. Or, you may want to classify the Consultants role into their area of expertise to report on the utilization for each of these subgroupings. For example, Financials or CRM consultants may cross organizational department and boundaries.

The difference between a tag group versus a Custom Fields is that the tag group allows you to track the changes in historical values. A custom field only shows and reports on the current value, whereas an employee's change in tag group values are represented throughout any time range in reporting.

For more information, see the help topic Tag Groups.

Target Utilization

The Target utilization link displays within the employee record after the Employee Demographic form is saved and the Target utilization feature is enabled. Target utilization is defined as the utilization expected from an employee for capacity planning purposes. After a target utilization has been set, various values become available for reporting including Target utilization, Base target hours, and others. Target utilization will be available in both utilization reporting as well as capacity reporting. Historical utilization reports may also be created. For more information, see the help topic Target Utilization.

Task Types

Project task types are useful in task assignments, time entries, receipts, and charges. They are important in the calculation of utilization and also help filter hour-related data in reports. When time is recorded against tasks with a defined task type, the task type is stored with the time entry record. You can display and filter the task and task assignment detail reports by project task type. You can also sub-total and filter Summary Reports and Advanced Resources reports by task type. The task type provides the ability to label individual tasks on a project. You can create as many types ass you need to accommodate your company's specific time tracking requirements. For more information, see the help topic Task Types.

Tax Location

Tax locations allow for complex tax requirements. After creating Tax locations, a Tax Location drop-down list is available within the following entities: Projects, Customers, and Users. To apply the taxes to an invoice, you must associate the appropriate Tax Location with the project. Multiple tax locations can be established to handle sophisticated tax requirements. For more information, see the help topic Tax Locations.

Tax Option

Tax Options provide the ability to select and create various taxation scenarios. These are available in the Invoices and Expenses modules. See the help topic Tax Options.

Team

A team is the group of users either booked or assigned to a project. For more information, see the help topic Other Settings under "Projects".

Tech Skills

Tech skills document the talents a resource has that are required by your organization. It is one of the standard Resource Profile elements. The tech skills link only displays in Resources Settings if you have activated this as a Resource profile option. For more information, see the help topic Tech Skills.

Templates

See Project Templates.

Terminology

Your administrator can customize all terminology in SuiteProjects Pro to meet the unique needs of your company. For example, one company may use the word project to describe work to be accomplished. Another company may call it a case, job, or assignment. For more information, see the help topic Interface: Terminology.

Territories

You can assign Territories to customers, prospects, and deals. These are an arbitrary geographical designation that you name. After you create them, you can include territory information when you create customer records. This field is visible on the customer list and in reports.

Definition of territories is related to Opportunities when there is an organizational structure defining regions of customer aligning with the sales organization. Examples are: East, West, US, and EMEA. If territories are not defined, then the field does not display on the customer form. For more information, see the help topic Territories.

Time Entry Rules

A time entry rule determines which time entries are assigned to the cost center. Time entry rules can be set by Customer, Project, Task, Expense Items, and User. You can choose multiple selections.

When a user creates and saves a timesheet, the associated time entry items are checked against the time entry rule selections. If a time entry matches a selected item that is associated with a cost center, the cost center is assigned to the cost, which is determined by multiplying the time entry by the employee's associated cost. If no item is found, then no cost center is assigned.

See the help topic Timesheet Rules.

Time Types

Time types offer a way to segregate and categorize timesheet entries and can be determined by the employee when entering the time. Some common values are: Regular Time, Overtime, and Personal Time. You can also use time types to determine billable or non-billable travel, paid time off, or other time entry classifications that may affect billing or reporting. See the help topic Time Types.

Timesheet Report Layout

The Timesheet report layout is what you would see if a timesheet were exported and printed as a PDF file, and the format displays on the approval tab for the timesheet approver. See the help topic Timesheet Report Layout.

Timesheet Rules

Timesheet rules are a way of putting policy around timesheet submissions. There are several Submission rules you can activate. See the help topic Timesheet Rules.

Timesheets Module

The Timesheets module is where users record their time against customer or internal projects. For more information, see the help topic Timesheets.

Tips Button

The Tips button moves all the contextual **Tips** into a more convenient location. The Tips button is context sensitive and displays the tips and special actions available. For more information, see the help topic Contextual Tips.

Trial Billing

Trial billing simulates running the project billing rules to get an estimated billing value. No billing transactions or invoice charges are generated, only the trial billing value. An email is sent for each project that has a trial billing amount. This does not impact forecasting, which is handled by charge projections, nor invoicing, which can be done using a manual billing approach. See the help topic Project Billing Defaults.

Back to Quick Links

U

User

A user is an individual that has access to SuiteProjects Pro. They can be your company's employees, subcontractors, or a Guest. See the help topic Users.

User Menu

The user menu shows your user name and role, and has a rollover menu that makes all the user specific features easily accessible from a common area. For more information, see the help topic User Menu.

User Entity Tag

The user entity tag feature allows you to specify particular attributes to a user. Although different from the standard fields on the demographic, these attributes can also be reported on. To use the user entity tag, you must have created Tag groups and the Attributes within them. Tag group values can be added to the Employees list. See the help topic Employee Entity Tag.

User ID

A user ID is unique identifier used to sign in to SuiteProjects Pro. To sign in to SuiteProjects Pro you need three credentials: Company ID, User ID, and Password. See the help topic Signing In to SuiteProjects Pro.

User Location

User locations allow you to store location attributes at the user entity level. These attributes can then be reported on. Sample user locations could be by state, by city, by country, or any customized list of values. For more information, see the help topic Employee Locations.

User Scripting

User scripting is one component of the SuiteProjects Pro platform, allowing you to customize SuiteProjects Pro to better meet the unique needs of your business. For more information, see the User Scripting.

Utilization

Utilization is a graphical view of booked and assigned employee utilization for a project. For more information, see the help topics Resource Booking Planner, Advanced Booking Worksheet, Managing Resource Bookings in the Project Center.

Back to Quick Links

V

Vehicles

Vehicles is an optional feature in the Expenses module that is not typically used. It displays in Application Settings for Expenses and Invoices. To allow this functionality, your administrator needs to select the Enable the Vehicle feature in the Optional Features form. For more information, see the help topic Vehicles

Vendor

Vendors play an important role for companies that use the Purchases application. A vendor is someone from which you purchase services or products. Purchase orders (POs) are issued to vendors and sent through SuiteProjects Pro provided the necessary information has been entered on the vendor record.

Vendors are an optional feature in the Expenses application and can be entered on receipts, if your account is configured to use vendors on receipts. The entry of Vendors is separate from customers. So if you provide services to a company but also purchase services/products from them, then you must create both a customer and a vendor record.

For more information, see the help topic Vendors.

Back to Quick Links

W

Web Services

See SOAP.

WIP

WIP or Work-In-Process is an accounting computation regarding the state of revenue recognition based on revenue recognition and invoicing. This is only derived in reporting, no WIP transaction is generated with the application. Depending on your accounting practice and the setup of billing rules to drive your revenue recognition, charges may be created that are used for revenue recognition but not invoicing. An example is a fixed price project which has an hours complete revenue recognition policy. If you are generating two sets of charges for this situation, one set of charges is used for invoicing (the fixed amounts) and the other is used to drive revenue recognition (as billed). WIP in this case should only be based on invoiced charges so this option would be checked. Likewise, any deferred billing charges would also not be included in WIP if they were not placed on an invoice.

Wizards

Wizards are generally available to account administrators but may be made available to others through role permissions. A wizard is a quick way to copy data or complete an action such as receipt deletion across multiple items at the same time. For more information, see the help topic Wizards.

Work Schedule

Work Schedules define the work week within your company. You can create multiple calendars to define different work weeks. Within the schedule you can also enter schedule exceptions, which are typically public holidays recognized by your company as non-working days. For more information, see the help topic Work Schedules.

Workspaces Module

The Workspaces module provides users with an area to store documents and share them with others. It acts as an administrative library. For more information, see the help topic Workspaces.

Back to Quick Links

X

XML

XML stands for e **X** tensible **M** arkup **L** anguage. SuiteProjects Pro provides an XML API as a layer for the exchange of SuiteProjects Pro data between the main site and peripheral programs. For more information, see the help topic XML API and SOAP API.

XML Commands

XML commands define the actions you can request through the XML API. For more information, see the help topic XML API Commands.

Back to Quick Links

Z

Zero-hour entries

This is a Timesheets Module option that allows an employee to capture notes on a time entry, but does not require the entry of hours to keep the notes in the time entry. See the help topic Other Settings under the Timesheets chapter in Administrator Guide.

Back to Quick Links