Optional Features

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Optional Features Overview

SuiteProjects Pro is highly configurable. Account administrators can configure the company settings to tailor SuiteProjects Pro according to company business processes. See the 📄 Administrator Guide for details.

This guide describes the optional features that can be enabled for each SuiteProjects Pro module on your account.

SuiteProjects Pro Professional Services can set the necessary configuration initially when your from the company's SuiteProjects Pro account is deployed. If you decide to take advantage of additional functionality, you can create a support ticket and request for SuiteProjects Pro Support to enable any of the optional features described in the following sections. See Creating a Support Case.

- Global
- Timesheets
- Expenses
- Projects
- Resources
- Invoices
- Reports
- Platform
- NetSuite Connector
- Workspaces
- Security
- Release History

Creating a Support Case

If you are experiencing difficulties with SuiteProjects Pro or would like to enable an optional feature, go to SuiteAnswers through the Support page in SuiteProjects Pro and create a support case.

Our support staff and engineers will work with you to find a solution to your problem.

> ⚠️ **Important:** Be sure to review the Support Usage Best Practice Guidelines, Case Severity Definitions and Case Resolution Overview before you submit a support case or call the Support team.
>
> As a part of the support case creation process you will be presented with existing answers that may solve your problem. Take a moment to view the available answers before proceeding to create a support case.

To create a support case:

1. Sign in to your company's SuiteProjects Pro account.
2. Go to the user menu in the SuiteProjects Pro application. To access the user menu, click your profile pictures or initials in the upper-right corner.

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3. Select **Support**.

4. Click **Explore SuiteAnswers**

5. In SuiteAnswers, click **Contact Support** in the top bar.

6. Click **Create Support Case** under Online Support.

> ⓘ **Note:** Depending on your support services subscription level, you may be able to access Support by phone. In this case, the page lets you select your country and shows a phone number that you can use to access Support by phone. The page also shows your SuiteProjects Pro account ID and your support services subscription level.
>
> The page also includes a link to the SuiteProjects Pro user group. Click **Ask an Expert from the SuiteProjects Pro Support Community** to go to the SuiteProjects Pro user group.

The Create a Support Case page appears.

7. Follow the onscreen instructions to create a Support case:

   a. Step 1 – Enter a search term to check for existing answers to your query.

   The first 5 search results appear. The list shows the number of articles matching your search. Oftentimes, an answer to your query already exists in SuiteAnswers. Review the search results and click **View all search results** to view other search results.

   b. Step 2 – Click and select the type of case you want to create.

   c. Step 3 – Choose a case severity. For more information about case severity levels, see the help topic Case Severity Definitions.

   > ⚠ **Important:** Always use the appropriate case severity when submitting a case. Using the appropriate case severity helps SuiteProjects Pro Support prioritize between cases. Otherwise, SuiteProjects Pro Support need to evaluate the true urgency of each case, which slows down the response time to all cases.

   d. Step 4 – Click and select the feature that your query relates to. Click the caret to expand options under each categories in the list. If you want to change the option selected, you need to delete the text first before you can select a different option.

   e. Step 5 – Enter your question or a description of the problem you encountered.

   f. (Optional) Attach files. Either click and select the files you want to attach or drag the files to the form.

   g. Enter or verify your email address.

   h. (Optional) Enter or verify your telephone number, including the country code and without any spaces, if you prefer to be contacted by telephone.

   - Do not enter anything into the "Attach Document" field.

   - In the "Email" field, type your email.

   > ⓘ **Note:** Requests to enable or disable account-wide features in SuiteProjects Pro can only be processed when an administrator's email address is entered in this field.

   - In the "Phone (Optional)" field, type a phone number where you can be contacted if you would prefer contacts you by telephone. Please include your country code and enter the number without any spaces.

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> **(i) Note:** If you are creating a support case to enable an optional feature controlled by SuiteProjects Pro Support, enter the following details:
>
> - In **Step 2. Click here to select the type of case you'd like to create**, select "Ask a question".
> - In **Step 3. Select a case severity**, select "C3 — How To / Non Urgent questions".
> - In **Step 4. Which Feature does it relate to?**, select "Switch Activation/Deactivation Requests" under the category "SuiteProjects Pro Web Application".
> - In **Step 5. Provide a short summary of your problem/question**, enter the name of the optional feature you want to enable or disable, the type of account (production or sandbox) and the Company ID for the account you want to enable or disable it for.

8. Click **Submit case**.

   An email confirmation with your support case reference (SuiteProjects Pro Customer Care #) is sent to your email address.

   SuiteProjects Pro Support will contact you to request additional information if necessary or guide you through any steps required to resolve the support case.

Create a Support Case

🔍 Step 1. Please enter a search term to check for existing help topics
Attachment drag and drop

Required

⌄ **137 Search Result for Your Issue**

❓ **Attachment File Drag and Drop**
Optional Features

❓ **Attachment Viewer and Attachment Thumbnail**
If the Attachment File Drag and Drop optional feature is enabled for your account, SuiteProjects Pro shows the thumbnail images in the attachments drag and drop section on the project, expense report, and receipt properties forms.

❓ **Global**
"Assigned to" Column Filter in Task List

❓ **Release History**
Updated

📄 **Unable to Drag and Drop Bookings in the Resource Planner**
Product:

[View All Search Results]

Step 2. Click here to select the type of case you'd like to create
Ask a Question ▼

Required

Step 3. Select a Case Severity
○ C1 - Critical / Business Down
○ C2 - Urgent
● C3 - How-to / Non-urgent Questions
○ C4 - Enhancement / Non-tech Support
Show/Hide case severity descriptions

Required

Step 4. Which Feature does it relate to?
Switch Activation/Deactivation Requests

Required

Step 5. Provide a short summary of your problem/question
Please enable the Attachment File Drag and Drop feature on our account (123456 CompanyID).

Required

Attach Files   +
Select a file or drag it here (max. 10MB)

Email address
marc@example.com

Required

Enter Contact Number (inc. country code)

[Submit Case]

ⓘ Please do not include any sensitive information in this form or in any subsequent case communication.

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Global

The following optional Global features are available in SuiteProjects Pro. Some features require SuiteProjects Pro Support to enable them for you.

- Accounting Period Functionality
- All Item Types in Calendar
- Allocation Grid Custom Field
- Allow the Owner/Requester/Administrator to Upload Attachments for Approved Objects
- Assign Project Job Codes for Users on a Per Project Basis
- "Assigned to" Column Filter in Task List
- Attachment File Drag and Drop
- Attachment Viewer and Attachment Thumbnail
- Automatic Backup Service
- Business Intelligence Connector
- Publish Shared Reports using BI Connector
- Conditional Dropdown Custom Fields
- Custom Email Notifications
- Custom List Layouts
- Deleted Attachment Recovery
- Display Contacts in "Last Name, First Name" Format in Drop-down Menus
- Display Incomplete Tasks on Dashboard
- Display the Booking's Requester Name in "Last Name, First Name Middle Name" Format in Reports
- Edit Exchange Cross Rates
- NetSuite Integration
- Enforce Column Filter Value Search
- Extended Character Set Support for List Sorting and Filtering
- Feature-Specific User Satisfaction Feedback Form
- Global Search
- Hide Divider Sections on Forms
- Inline-Editing in Lists
- List Column Selection
- Multicurrency
- Multiple Schedule Exceptions Per Day by Time Off Requests
- Next-Generation Homepage
- Overlapping Timesheets and Envelopes at the Role Level
- Pick List Custom Field
- Product Updates Panel
- Proxy Approver Notifications
- Query Builder
- Quick Audit Trail for Custom Fields

- Quick Audit Trail for Global Settings
- Redesigned Administration Module
- Redesigned Advanced Filters
- Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata
- Restrict Specific Custom Fields from Being Copied
- Single Sign-On Integration Leveraging SAML
- Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata
- Stop Slow Lists
- Stop Slow Reports
- Suppress Email Notifications or Add Addresses to Notifications
- To-Do List
- Unexport Records from a Specific Application by UI
- Use Days Instead of Hours for All Time Entries
- User-Defined Reporting Currencies
- Wrap Text in List Cells

Accounting Period Functionality

By enabling this feature, separate accounting dates can be associated with most transactions, with reports drawing from these accounting dates. The ability to maintain separate accounting dates can be particularly useful 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 example, the charges on an invoice dated July 5th may need to be associated with the month of June in the general ledger, as the charges were incurred in this month. The invoice transaction date would be 07/05/09, however, the invoice accounting date might be 06/01/09.

In another example, a receipt incurred in March may need to be posted to the financial system in June. In this example, the receipt transaction date might be 03/17/09, while the receipt's accounting date might be 06/01/09. The new accounting period functionality lets users to associate an additional independent accounting date with a transaction. Reports can then be configured to leverage the accounting dates, rather than the original transaction dates.

To enable this feature, contact SuiteProjects Pro Support.

All Item Types in Calendar

By default, the type of items a user can see in the calendar depends on which modules this user can access. The following table lists the types of calendar items, and the application access required to view each item type

Item type	Access required
Bookings	Resources module
Time off requests	Timesheets module
Task assignments	Projects module
Work schedule	Account module

With this feature, employees can see their task assignments and bookings in the calendar even if they do not have access to the Resources and Projects modules. This lets you control access to modules that are not needed while enabling employees to see their full schedule in the calendar.

> **Note:** Module access determines which type of user license is taken up by the employee. An employee with any combination of `Account`, `Timesheets` and `Expenses` application access takes up a Timesheets and Expenses (T&E) only license. An employee with any other application access takes up a Full user license. For more information, see the help topic Licenses.
>
> For more information about controlling employee module access, see the help topic Access Control Overview.

To enable this feature, contact SuiteProjects Pro Support.

Allocation Grid Custom Field

With this feature enabled, you can create allocation grid custom fields.

To enable this feature, contact SuiteProjects Pro Support.

Allow the Owner/Requester/Administrator to Upload Attachments for Approved Objects

This feature permits an owner/requester/administrator to manage the attachments for an approved object. Eligible objects include

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- Authorizations
- Bookings
- Booking requests
- Deal booking requests
- Envelopes
- Invoices
- Proposals
- Purchase orders
- Purchase requests
- Schedule requests
- Receipts
- Timesheets

With this switch on, approved items can be downloaded, replaced, and deleted for the selected objects.

To enable this feature, contact SuiteProjects Pro Support.

Assign Project Job Codes for Users on a Per Project Basis

This feature enhances the job code functionality to allow managers to assign different job codes to users based on the specific job function being performed on particular projects. These project job codes can be assigned per user in multiple areas of the application by configuring job code rules. These areas include bookings, time entry, project level assignment, and task assignment. The appropriate project job code will be assigned when time entries are saved.

After project job code rules have been configured, they can be linked to specific rate cards. Time billing rules can be configured to derive rates from rate cards. Thus, billing will occur based on the appropriate rate, as determined by the role an individual fulfilled for the project. Revenue recognition transactions generated from the As Billed revenue recognition rule will contain the appropriate job code assigned stemming from the hourly charges created by Billing Rules. The billing and recognition transactions list can be customized to include the associated project job code. For forecasting purposes, charge and revenue projections will use the assigned project job codes when using time entries, and calculate project job codes (through job code rules) when forecasting using billings or project/task level assignments.

In addition, invoice layouts can be modified to include "Project job code" as an invoice column and invoice grouping. To modify an invoice layout, users with the appropriate roles privileges, go to Administration > Application Settings > Invoices > [select an invoice layout].

To enable this feature, contact SuiteProjects Pro Support.

"Assigned to" Column Filter in Task List

Use the column filter for the **Assigned to** column in the Project > Tasks list to list only those tasks that are assigned to a specific resource.

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The **Assigned to** column filter is always visible. By default, it does not let you select a specific resource — only the -All- metavalue is available in the column filter dropdown options. With this feature enabled, you can select a specific resource to list only those tasks that are assigned to the selected resource.

> **ⓘ Note:** When you click **<number> incomplete tasks** in the Home > Home (My Status widget), the tasks list appears and lists only those tasks that are assigned to you. The **Assigned to** column filter shows your name (the name of the authenticated user) even when this feature is not enabled. Clear column filters or select the -All- metavalue to revert back to listing all tasks in the tasks list and not only those tasks that are assigned to you.

To enable this feature, contact SuiteProjects Pro Support.

Attachment File Drag and Drop

This feature lets you add attachments to projects, expense reports and receipts using file drag and drop. After you enable this feature, a new user interface for attachments appears on the project, expense report, and receipt properties forms. Like with the default attachment user interface, you can either attach multiple files from your computer or attach a single workspace document.

To add one or multiple files from your computer as attachments, drag the files to the **file attachments** box. The attached files appear in the **file attachments** box and include information about the file (file name, size, date and time uploaded, uploaded by).

> **ⓘ Note:** The date and time uploaded follows the preferred date format and time zone in your personal settings.

You can also drag a folder from your computer to attach all the files contained in the folder.

After the files are attached the following options are available:

- The number of attachments ④ is indicated in the top right corner of the **file attachments** box.

- To download a single attachment, click the download icon ⬇.

- To download all attachments as a Zip archive, click the download icon in the top right corner of the **file attachments** box ⬇.

- To manage the current attachments, click the edit icon ✎.

- To delete an attachment, click the delete icon 🗑.

- To delete all attachments, click the delete icon 🗑 in the top right corner of the **file attachments** box.

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> **Note:** When you create a new project, expense report, or receipt, you can add attachments before you save the form. If you leave the form without saving the changes, the attachments will be saved in SuiteProjects Pro as unassigned attachments. For more information, see Unassigned Attachments.
>
> If you add attachments using file drag and drop to an existing project, expense report, or receipt, the attachments will be associated with the project, expense report, or receipt even if you do not save the form.
>
> The form shows a maximum of 100 attachments for receipts and 1,000 for expense reports.
>
> The Attachment Viewer and Attachment Thumbnail optional feature extends the functionality of the Attachment File Drag and Drop feature. See Attachment Viewer and Attachment Thumbnail.
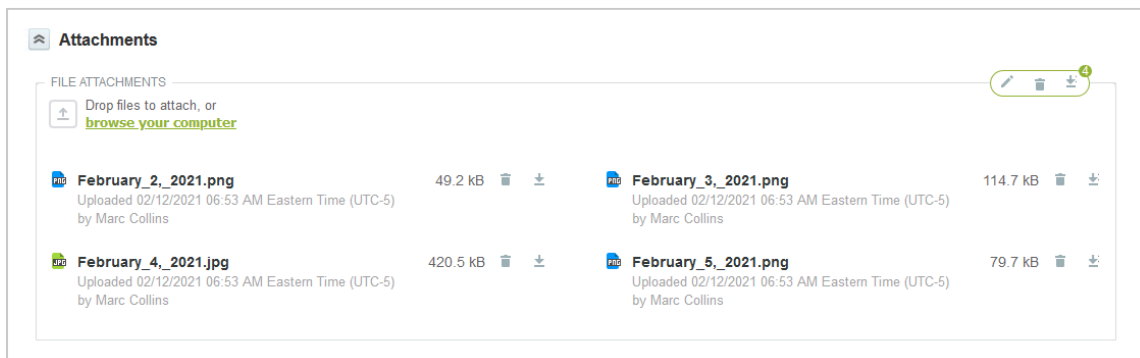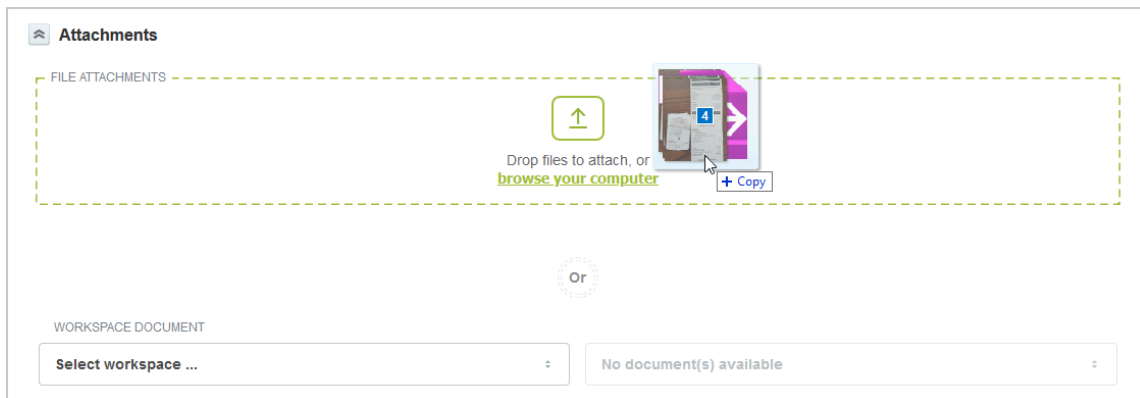
To attach a workspace document, select the workspace then select the document. To clear the selected workspace document, click on the clear icon × .
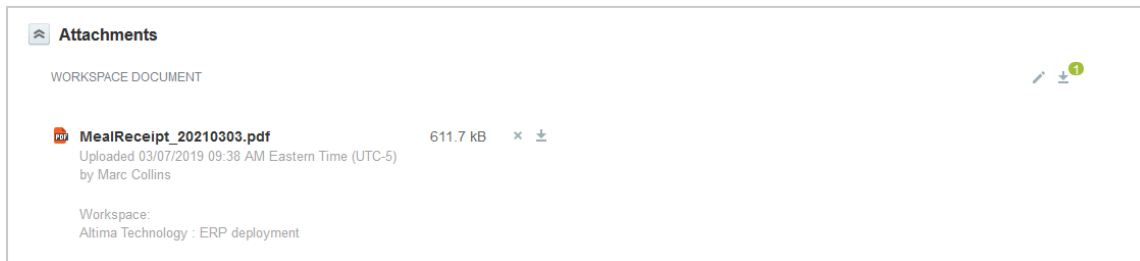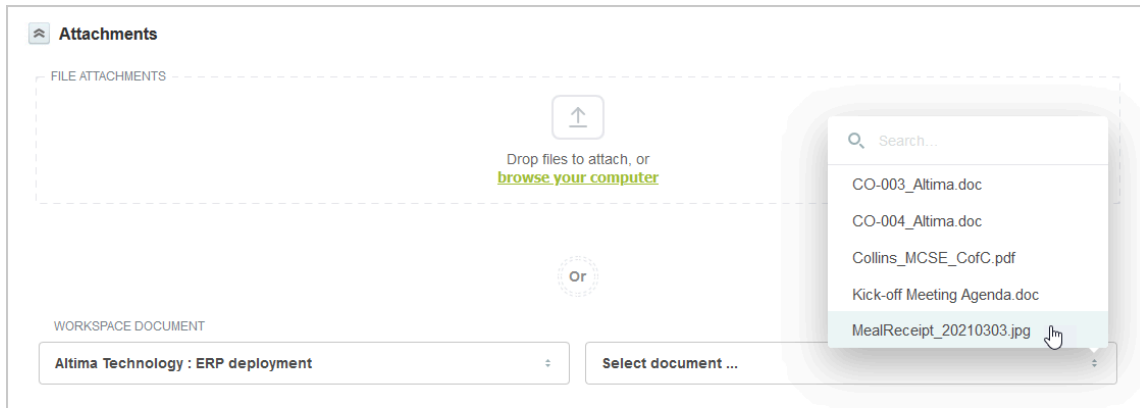
Unassigned Attachments

When you create a new project, expense report, or receipt, you can add attachments before you save the form. If you leave the form without saving the changes, the attachments will be saved in SuiteProjects Pro as unassigned attachments. The next time you open any of your projects, expense reports or receipts, the form will include an **unassigned attachments** box listing all the attachments that you uploaded and that are not associated with a project, expense report, or receipt.

- The number of unassigned attachments ④ is indicated in the top right corner of the **unassigned attachments** box.

- To associate unassigned attachments to the current project, expense report, or receipt, drag the files from the **unassigned attachments** box to the **file attachment** box.

- To associate all unassigned attachments to the current project, expense report, or receipt, click the arrow icon ← in the top right corner of the **unassigned attachments** box.

- To delete an unassigned attachment, click the delete icon 🗑 .

- To delete all unassigned attachments, click the delete icon 🗑 in the top right corner of the **unassigned attachments** box.

- To download an unassigned attachment, click the download icon ↓ .

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Viewing and Deleting All Unassigned Attachments Uploaded to the Account

Account administrators can manage unassigned attachments added by all users on the account.

To manage the unassigned attachments, go to Workspace > SuiteProjects Pro — Unassigned Attachments > Documents. The SuiteProjects Pro — Unassigned Attachments workspace is created automatically when the first unassigned attachment is added to your account. Only account administrators can view this workspace.

To delete all unassigned attachments

1. Sign in to SuiteProjects Pro as an account administrator.
2. Go to Workspace > SuiteProjects Pro — Unassigned Attachments.
3. Click **Download all documents**. A dialog appears.
4. Check the **Delete all documents** box.
5. Click **Download**. A page appears confirming that all documents in the workspace were deleted. The page also includes a link to a ZIP archive to download all deleted documents.

> ✔ **Tip:** To save storage space, delete documents from the SuiteProjects Pro — Unassigned Attachments workspace regularly.

> ⚠ **Important:** Attachments to an unsaved new project, expense report, or receipt are initially added in to the "SuiteProjects Pro — Unassigned Attachments" workspace until the user saves the entity form. When deleting all documents in the workspace, you may delete attachments for projects, expense reports and receipts that users are currently working on. Make sure you time unassigned attachment deletion accordingly.

To enable the Attachment File Drag and Drop feature, contact SuiteProjects Pro Support.

Attachment Viewer and Attachment Thumbnail

View thumbnails for BMP, GIF, JPG, PDF, PNG, and TIFF files, and preview BMP, GIF, JPG, PDF, and PNG attachment files directly from the project, expense report or receipt properties form, and from the expense report or receipt lists.

After you enable the Attachment Viewer and Attachment Thumbnail optional feature for your account:

- SuiteProjects Pro generates a thumbnail image automatically when you add a new attachment or workspace document and if the file type is supported. The thumbnail is generated whether you add the attachment file or workspace document using the SuiteProjects Pro UI, REST API, SOAP API or XML API. See Attachment Thumbnail Autogeneration.

> **Note:** Review the current limitations:
>
> - Thumbnail images are generated for all supported attachment files you add throughout SuiteProjects Pro.
> - Thumbnail images are not available for attachment and workspace document files added before the Attachment Viewer and Attachment Thumbnail feature was enabled for your account.

- If the Attachment File Drag and Drop optional feature is enabled for your account, SuiteProjects Pro shows the thumbnail images in the attachments drag and drop section on the project, expense report, and receipt properties forms.
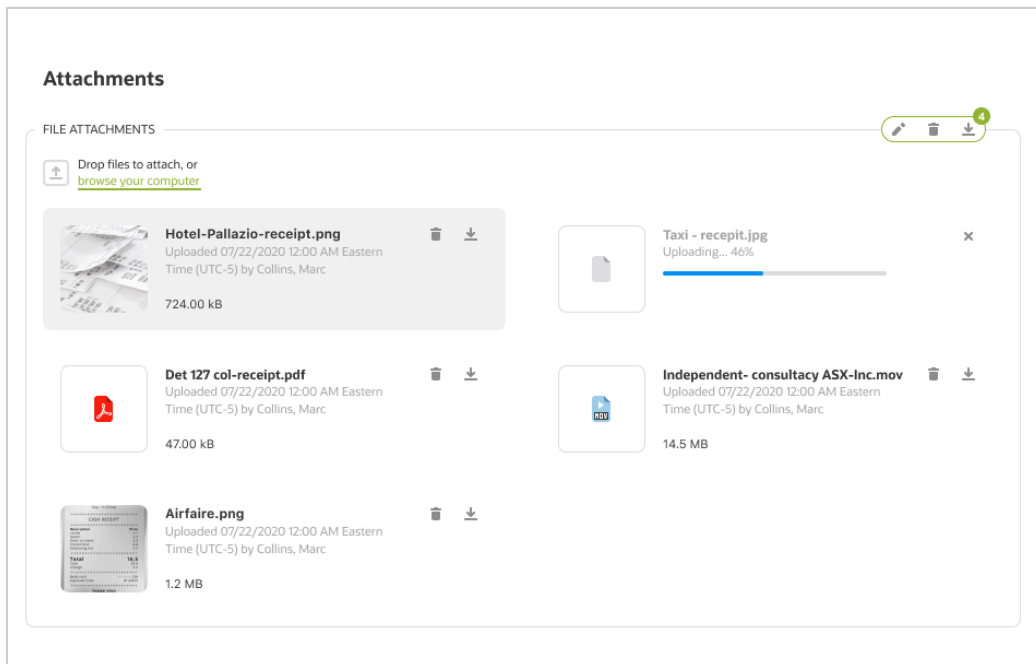
- You can add the Thumbnail column to the following lists.
    - Expenses > Expense Reports
    - Expenses > Expense Reports > [*Select an expense report*] > Receipts
    - Expenses > Receipts

The column shows a thumbnail for each attachment when the thumbnail exists, or a file type icon otherwise.

If there are more attachment thumbnails than can be shown in the column, the column shows a **+<n>** icon ⊞+2, where <n> is the number of additional attachment files for which thumbnails are not shown. The column shows as many thumbnails as can fit in within the width of the column up to 10 attachment thumbnails.

If there are no attachments for the expense report or receipt, the column shows a no attachment icon ⊠.

- You can click a thumbnail to preview a BMP, GIF, JPG, PDF, or PNG attachment file directly from the project, expense report, or receipt properties form, and from the expense report or receipt lists. The attachment viewer shows:

  1. The file name and corresponding file type icon in the top bar.

  2. The attachment file preview.

     Click the arrows on the left or right of the preview pane to view the previous or next attachment.

  3. A toolbar with the following actions:

     □ Click the download icon ⤓ to download the attachment.

     □ Click the window icon ⧉ to open the attachment in a new tab or window.

     > ⓘ **Note:** You can also use action keys on your keyboard:
     >
     > □ ESC – Close the attachment viewer.
     >
     > □ Left arrow – View the previous attachment.
     >
     > □ Right arrow – View the next attachment.

  4. A navigation bar showing thumbnails for all attachments to the expense report or receipt. Click a thumbnail to view the attachment in the preview pane.

The navigation bar and preview pane show a file type icon for most unsupported file types, a generic file icon 📄 for other unsupported and unknown file types, no attachment icon 🖼 if there is an error with the attachment, such as a corrupted file, for example.
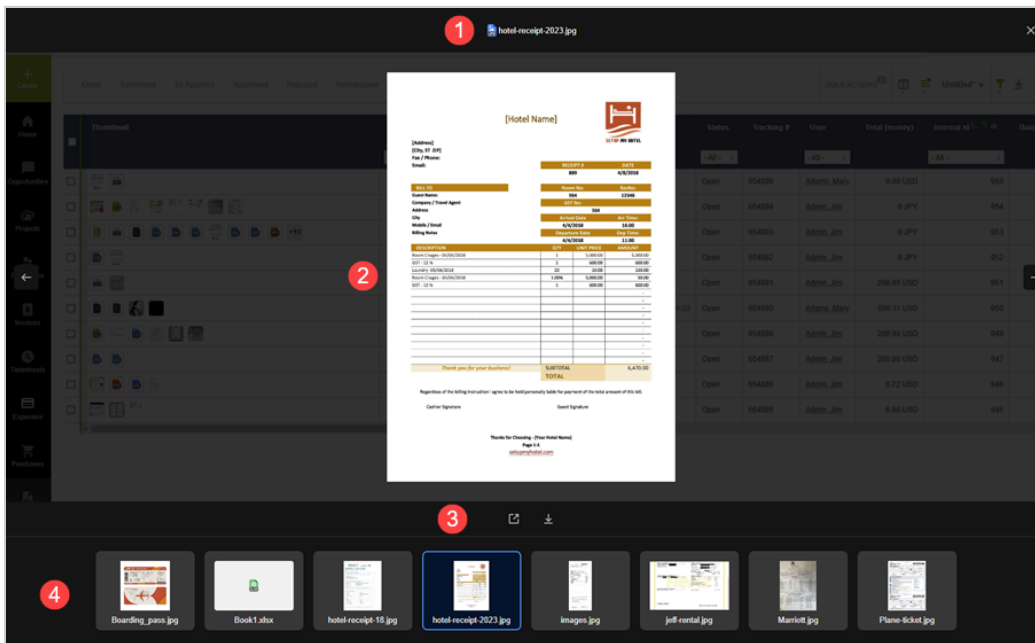
> ℹ **Note:** The attachment viewer uses the native browser PDF viewer to show a preview of PDF documents.
>
> ▫ Most browsers let you view PDF documents in a browser tab using a native PDF viewer by default. You or your organization may disable the PDF viewing capabilities in the browser settings. When the native browser PDF viewer is disabled, the attachment viewer does not show a preview of the PDF document. Instead, it starts downloading the file automatically or lets you click **Open** to download the file to your device.
>
> ▫ If you interact with the PDF viewer, you can no longer use the action keys to interact with the attachment viewer.
>
> ▫ If the PDF viewer cannot read the document, the attachment viewer shows a reload button or nothing, depending on your browser.

To enable this feature, contact SuiteProjects Pro Support.

Attachment Thumbnail Autogeneration

When the Attachment Viewer and Attachment Thumbnail optional feature is enabled, SuiteProjects Pro generates a thumbnail image automatically when you add a new attachment or workspace document and if the file type is supported. The thumbnail is generated whether you add the attachment file or workspace document using the SuiteProjects Pro UI, REST API, SOAP API or XML API.

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- The thumbnail image is generated immediately (in a few seconds or longer, depending on the SuiteProjects Pro system load).

- The thumbnail image is generated again when using you replace the attachment file or add a new revision of the workspace document.

- The thumbnail image is generated when using the copy/move document functionality for workspaces.

- The thumbnail image file for each attachment is stored in the same folder as the attachment file.

- The thumbnail image is deleted when the attachment is deleted, including when the attachment is deleted because the record it is associated with is deleted. The thumbnail image is restored when the attachment is restored.

- Thumbnail image files do not count toward your account storage limit.

- The smaller side of the thumbnail image is always 80px, the other side maintains the aspect ratio of the attachment file.

- Supported attachment formats and corresponding thumbnail image format.

Attachment file	Thumbnail image	Attachment Viewer
BMP	PNG	✓
GIF	GIF (Static)	✓
JPEG, JPE, JPG	PNG	✓
PDF	PNG (The first page of the PDF document is used to generate the thumbnail)	✓ The native browser PDF viewer must be enabled.
PNG	PNG	✓
TIF, TIFF	PNG (Multilayered TIFF images are flattened to generate a thumbnail image including all visible layers)	—

> **Note:** In the case of attachments added using the SOAP API or XML API, the attachment file is provided as base64-encoded data using the `base64_data` attribute.

Automatic Backup Service

The Automatic Backup Service (ABS) lets you set up a regular delivery of your company's SuiteProjects Pro account data to an email address or SCP/SFTP server for safeguarding. Your data is compressed as a ZIP file and can be PGP encrypted for additional security. You can use this feature to download all of your company's SuiteProjects Pro data and attachments.

> **Note:** The Automatic Backup Service is a licensed add-on and must be purchased separately. To enable the Automatic Backup Service feature, contact your SuiteProjects Pro account manager or SuiteProjects Pro Professional Services.
>
> For more information about the feature and its configuration options, see ⬛ Administrator Guide.

Business Intelligence Connector

Connect your Business Intelligence tools directly to your SuiteProjects Pro list and report data.

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The Business Intelligence (BI) Connector feature gives you point and click access to SuiteProjects Pro data from existing reporting, business intelligence, workflow, and integration applications.

The Business Intelligence Connector provides the following features:

- Publish reports and provide access to the report data from the BI Connector.

- Publish lists giving users real-time access to SuiteProjects Pro data from the BI Connector. User access rights configured in SuiteProjects Pro are enforced preventing access to data the user does not have permission to see. All essential object lists are supported.

- Role permissions are supported to give administrators control over who can publish data.

- Access to published reports are available using the `NSOA.report.list` and `NSOA.report.data` user scripting functions.

- Use published lists like custom queries and read the latest list data in your form and scheduled scripts with the `NSOA.listview.list` and `NSOA.listview.data` user scripting functions.

See the 📄 Business Intelligence Connector for more details.

> ℹ️ **Note:** The Business Intelligence Connector only supports the latest version of OData V4 / JSON (Open Data Protocol).

To enable this feature, contact your SuiteProjects Pro account manager. This feature does not support SAML users.

Conditional Dropdown Custom Fields

Add relational dependencies between two or more dropdown custom fields.

This feature lets you create value selection dependencies between two dropdown custom fields. The value selected in the first custom field will be able to limit the values shown for the second custom field. After dependencies have been configured, the second custom field will dynamically appear on the form with the appropriate value choices. A single custom field can have dependencies with multiple custom fields. In addition to creating conditional dependencies between two custom fields, a value list editor is available. Leveraging drag-and-drop functionality, you can move the position of values within a single list.

After you enable or disable this optional feature, go to Administration > Global Settings > Account > Maintenance Settings, choose **Regenerate the custom field value list table**, and click **OK**.

To enable this feature, contact SuiteProjects Pro Support.

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Changes to Dropdown Field Value List Definition

When enabled, this feature changes how you set the list of values for dropdown fields on the custom field properties form. Use the following steps instead of entering a list of values:

1. Click the **Values** text area.

   The New Field Values popup window appears.

2. Repeat the following for all values you want to add:

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      a.   Click the + button to add a new value.

      b.   Enter a value and click **OK** next to this new value.

3.   Click **OK** to save the values and return to the custom field properties form.

Custom Email Notifications

There are many events that can occur in SuiteProjects Pro when it may be beneficial to send an email notification to a user. For example, when a user is assigned to a task within a project, the project manager may choose to notify the user of this assignment. Or, if a booking has been created for a resource on a project, the booked user may be notified of the booking. In some cases, it may be beneficial to send a notification based on specific criteria. It may also be helpful to send the notification to select users as well as customize the body of the email to include additional information about the event.

This feature extends existing email notifications functionality. Within each application setting, there is a new Notifications area where the criteria, recipients, and email body can be configured. For example, a notification may be configured such that a new booking notification will only be sent to the booked user if the booking type is set to **Requested**. In addition to configuring the criteria, users can be selected as recipients of the email. The email body can be customized to include additional text as well. Multiple notifications may be configured.

> (i) **Note:** email notifications are available in Application Settings for Expenses, Invoices, Projects, Resources and Timesheets. The notifications can be triggered by specific events — for example on booking creation, modification, deletion, approval, submission, rejection and approval request for the Resources application.

To enable this feature, contact SuiteProjects Pro Support.

Custom List Layouts

Enable users to personalize the layout of any list that they have access to in SuiteProjects Pro and to adapt the list layout to their specific needs. Create public list layouts that are available to all users in your company, and set a public list layout as the default list layout for new employees.

The list layout functionality lets you:

- Save multiple layouts for a list. This enables you to use a different list layout depending on the task you want to complete in SuiteProjects Pro. Each list layout is associated with the object type or list it was created for. You may have one set of list layouts for timesheets, and another for expense reports, for example, but you cannot apply a list layout that you created for timesheets if you are viewing a list of expense reports.

- Change the layout for the list you are viewing at any time. You can change the layout to either:
  - A list layout you created and saved.
  - A public list layout. Public list layouts are available to all users in your company.

- Depending on your access profile, you can create public list layouts that are available to all users in your company.

- Depending on your access profile, you can set a list layout as the default list layout for new employees.

The list layout saves the following parameters:

- Columns and column order — See the help topic Selecting List Columns.

- Sorting options including the columns your list data is sorted by, and the sort level and sort order for each column — See the help topic Sorting the List Data.

- Number of rows per page — see the help topic Other List Options.
- Column filters — see the help topic Column Filters.

> **ⓘ Note:** The following list parameters are not saved as part of the list layout:
>
> - Column lock and column totals settings.
> - Advanced filters. You can save advanced filters separately. See the help topic Advanced Filters.

For more information about using list layouts, see the help topic Personalized List Layouts under User Guide.

To enable this feature, contact SuiteProjects Pro Support.

Deleted Attachment Recovery

Recover deleted files, including receipt photos, résumés or CVs, or other attachments, to a specified workspace or to their original location, or download the files to your PC.

After you enable this feature, you can:

- Restore a deleted attachment to its original attachment, or to a specific workspace.
- Download deleted attachments.

To enable this feature, contact SuiteProjects Pro Support.

> **ⓘ Note:** Records deleted 180 days or more ago are not generally available for recovery. Record retention periods may change in the future. For more information about deleted record retention, see the help topic Data Deletion.
>
> Recovered files count against your account's file storage limit.

To recover a deleted file to its original location:

1. Go to Administration > Global Settings > Account and click **Restore deleted document/folders**.

   > **ⓘ Note:** The original location must still exist to recover a deleted file to it. You cannot recover a deleted file to a deleted record.

2. In the **Run an Action** column, select the checkbox next to the file or files you want to recover.
3. In the **Run an Action** dropdown list, select **Restore files to original records**.
4. A dialog appears showing the status of the recovered files. Click the **Click here** link to close the window and refresh the list of deleted files.

To recover a deleted file to a workspace:

1. Go to Administration > Global Settings > Account and click **Restore deleted document/folders**.
2. In the **Run an Action** column, select the checkbox next to the file or files you want to recover.
3. In the **Run an Action** dropdown list, select **Restore deleted files**.

   Alternatively, you can click the **Undelete** button in the **Commands** column.
4. In the Actions dialog, select a Workspace to recover the deleted files to and click **OK**.
5. A dialog appears showing the status of the recovered files. Click the **Click here** link to close the window and refresh the list of deleted files.

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To download a deleted file to your PC:

1. Go to Administration > Global Settings > Account and click **Restore deleted document/folders**.
2. In the **Run an Action** column, select the checkbox next to the file or files you want to recover.
3. In the **Run an Action** dropdown list, select **Download**.

   Alternatively, you can click the **Download** button in the **Commands** column.
4. Select a location to save the file to and save the file.

Display Contacts in "Last Name, First Name" Format in Drop-down Menus

This feature changes the contact display format to "Last name, First name" in dropdown menus, instead of using the default "First name Last name" format.

To enable this feature, contact SuiteProjects Pro Support.
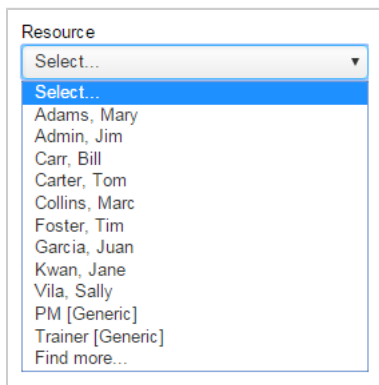
Display Incomplete Tasks on Dashboard

Enable this feature to show the number of open or pending tasks in the My Status and Company Status portlets on the classic homepage and in the to-do list.

Depending on your implementation and use of SuiteProjects Pro, you may not need the status portlets to show the number of pending tasks. For example, if you are using tasks mainly to manage access to timesheets and expenses, you may accumulate a high number of open or pending tasks over time. Showing a high number of pending tasks in the status portlets impacts the performance of the classic homepage and the to-do list. Excluding this information should improve loading time for the classic homepage and the to-do list.

To enable or disable this feature, contact SuiteProjects Pro Support.

Display the Booking's Requester Name in "Last Name, First Name Middle Name" Format in Reports

This feature displays the booking's requester name as "Last Name, First Name Middle Name" format in reports.

To enable this feature, contact SuiteProjects Pro Support.

Edit Exchange Cross Rates

Enable this feature to let account administrators edit the cross rate table.

When enabled, the cross exchange rates (forex table) can be modified. If you have entered a currency override rate in the "Set Exchange rates" form, this will take care of the FUTURE rate. If date ranges outside the current dates are entered the forex table will automatically be extended to cover those ranges. The extensions will be done using the current PAST or FUTURE rates dependant on the direction of the extension.

To edit exchange cross rates, go to Administration > Global settings > Organization > Currencies > View exchange rates, click the Tips button then click **Modify the exchange cross rate table**.

To enable this feature, contact SuiteProjects Pro Support.

NetSuite Integration

This feature lets you integrate SuiteProjects Pro with NetSuite. After you enable the feature, go to Administration > NetSuite Connector to set up the integration in SuiteProjects Pro. You also need to set up NetSuite for the integration. For more information about the NetSuite integration, see 📄 NetSuite Integration.

To enable this feature, contact SuiteProjects Pro Support.

Enforce Column Filter Value Search

Column filters with a high number of distinct values have an impact on list performance and usability. A solution is to stop distinct values being loaded when users open the column filter, to enforce a search for matching column filter options and to limit the number of matching values returned to 1000. This solution

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can be applied to selected column filters on request. It can be particularly useful for project or resource name columns, for example.

> **ⓘ Note:** This feature is built in for the Tasks column filter. To show the list of options in the Tasks column filter, type at least 3 characters in the search box and press Enter.. It is optional for all other column filters.

To stop distinct value dropdown options being loaded for selected column filters:

1. Identify and list the column filters with high number of distinct value dropdown options.
2. Contact SuiteProjects Pro Support and ask for the **Enforce column filter value search** feature to be enabled for the column filters identified in step 1.

> **ⓘ Note:** This setting will apply to the specified column filters across all lists on your account.

This performance optimization feature modifies the user interaction for the specified column filters:

1. When clicking the column filter dropdown, a message appears instead of the usual dropdown options.
2. To show the list of options, type at least 3 characters in the search box and press Enter. SuiteProjects Pro returns a list of up to 1000 values containing your search string.
3. If there are more than 1000 matching values in the database, only the first 1000 values are returned as search results and a message appears above the search results. Refine your search until there are less than 1000 matching values.
4. To filter the list of values returned by your last search, type any number of characters in the search box BUT do not press Enter. The list of values is filtered as you type with matching strings highlighted in bold.

> **ⓘ Note:** Filtering as you type only takes into account the values returned by your last search. If your initial search matched more than 1000 values in the database, only the first 1000 values were returned and are available for filtering. Other matching values may exist in the database but are excluded as there were not returned in the last search. You should refine your search until there are less than 1000 matching values (step 3) before filtering the search results.

5. Select the desired options to set the column filter.

Extended Character Set Support for List Sorting and Filtering

This optional features corrects sorting and filtering issues that may occur in lists when using characters that are not in the basic Latin alphabet set of characters.

By default, SuiteProjects Pro supports the ISO basic latin alphabet (26 characters A-Z) for sorting and filtering in lists. This may not be suitable for localization and international usage, depending on the set of languages used for your company's SuiteProjects Pro data. In particular, it is not suitable for languages that use:

- An extended Latin alphabet that includes additional characters using diacritics or ligatures. For example, the German alphabet includes one ligature (ß) and three diacritics (umlauts — Ä, Ö, and Ü).
- A non-Latin script.

Enable this feature to extend character support for sorting and filtering in lists to the Basic Multilingual Plane in the Unicode standard. This adds support for most commonly used language character sets.

> ⚠️ **Important:** This feature uses data conversion that may impact the performance of lists. Lists may load more slowly after you enable this feature.

To enable this feature, contact SuiteProjects Pro Support.

without extended support

	Project ≡ ≡ 🔒	Client	Project owner
☐	All	Altima Technol ⬍	All ⬍
☐	Wings	Altima Technology	Adams, Mary
☐	SRP deployment	Altima Technology	Porter, Marie
☐	SRP deployment	Altima Technology	
☐	Pegasus	Altima Technology	Collins, Marc
☐	Ostern (Easter)	Altima Technology	Davis, Judy
☐	First Slack Project	Altima Technology	Collins, Marc
☐	ERP integration	Altima Technology	Porter, Marie
☐	ERP deployment	Altima Technology	
☐	ERP deployment	Altima Technology	Porter, Marie
☐	CRM integration	Altima Technology	Collins, Marc

with extended support

	Project ≡ ≡ 🔒	Client	Project o...
☐	All	Altima Technol ⬍	All ⬍
☐	Wings	Altima Technology	Adams, Mary
☐	SRP deployment	Altima Technology	Porter, Marie
☐	SRP deployment	Altima Technology	
☐	Pegasus	Altima Technology	Collins, Marc
☐	Österreich (Austria)	Altima Technology	Davis, Judy
☐	Ostern (Easter)	Altima Technology	Davis, Judy
☐	First Slack Project	Altima Technology	Collins, Marc
☐	ERP integration	Altima Technology	Porter, Marie
☐	ERP deployment	Altima Technology	
☐	ERP deployment	Altima Technology	Porter, Marie

	Project ≡ ≡ 🔒	Client	Project owner
☐	O ⬍	Altima Technol ⬍	All ⬍
☐	Ostern (Easter)	Altima Technology	Davis, Judy

	Project ≡ ≡ 🔒	Client	Project owner
☐	O ⬍	Altima Technol ⬍	All ⬍
☐	Österreich (Austria)	Altima Technology	Davis, Judy
☐	Ostern (Easter)	Altima Technology	Davis, Judy

Feature-Specific User Satisfaction Feedback Form

We use an optional feedback form to gather feedback about specific features. It helps us gain understanding and improve the features usability and user experience in future.

The feedback form is currently enabled for the following features:

- Advanced resource search
- Consolidated resource profile
- Expenses module
- Outline, Gantt and task detail view
- Project center
- Receipt attachments UI
- Resource compare view

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The feedback form appears after the user has interacted with the feature several times. For example, users will be asked for feedback after running several searches on the Advanced Resource Search, updated profiles several times using the Consolidated Resource Profile, or loading the Compare view several times.

Users can opt out of the survey either by selecting the **Don't show me this feedback form again** option on the feedback form or by selecting **Disable feature-specific survey form** in Personal settings. Users can opt in again later by changing the preference in Personal settings.

The feedback form consists of a simple satisfaction question, asking users to rate the feature on a scale.

Users can postpone answering by clicking **Show me later** or closing the popup window, and the feedback form will pop up again 30 days later.

If the response is either negative (Somewhat dissatisfied / Extremely dissatisfied) or neutral (Neither satisfied nor dissatisfied), users are prompted for additional optional feedback.

After the user submits the form, a message displays to thank users for their feedback and the answers are stored. Users will not be prompted again for feedback on the same feature unless significant changes have been made to the feature and feedback is required to measure whether these changes have improved the feature for end users.

The feature-specific user satisfaction responses data can be downloaded using Administration > Global Settings > Account > Integration: Import/Export > Export All data in MySQL format or Administration > Global Settings > Account > Automatic Backup Service.

> ⓘ **Note:** The feature-specific user satisfaction survey can be disabled for your account. To disable this feature, contact SuiteProjects Pro Support.

Global Search

Search and quickly go to any of the create actions, lists, tools and settings pages accessible from the navigation menu, or search for a customer, project, employee or resource.

The Global Search feature brings together navigation suggestions, personal shortcuts and modern search.

You can access the global search from any page by clicking the red search icon in the upper-right corner or pressing ⒮ on your keyboard.

The global search page initially shows navigation suggestions and your navigation shortcuts side-by-side. The suggestions and shortcuts are replaced with search results when you start entering a term in the search bar.

You can search for:

- A navigation menu item (main navigation and create menu) – For example "timesheets" or "create timesheet".
- A customer, project or employee (resource) record.

The search functionality uses rotated search hints, rapid type-ahead, synonym-matching, and integrated business objects to help you construct search phrases and find what you're looking for even if you don't know what it's called in SuiteProjects Pro.

The search results show only the areas and information that you have access to.

For more information about using the global search, see the help topic Getting Started with Global Search.

Account administrators can control global search settings and perform maintenance tasks. To do so, go to Administration > Global settings > Account > Global search.

The global search settings page lets account administrators:

- Choose whether to add global search coverage for additional item types in your company's account as and when this coverage becomes available.

> **Note:** In SuiteProjects Pro 2024.2, global search coverage is limited to navigation items (main navigation and create menu), customers, projects and employees (resources). These item types are always available using the global search and it is not possible to remove coverage for these object types.
>
> As and when we extend global search coverage to additional item types in future, coverage for each additional object type will be optional. Account administrators will be able to add or remove coverage for these additional object types in your company's account.

- Update the information available for an object type in the global search functionality. To do so, locate this object type and click **Synchronize**.

The data synchronization is queued and progress information (percentage) or the date and time the last synchronization completed is shown on the page.

Object data synchronization may be required when:

- A new navigation item or create action is introduced in your company's account by a new release or by a change in your account configuration. In this case, you must synchronize navigation items before you can search for the newly introduced navigation items and create actions.

- We make changes to the information that you can use to search for objects. This may be the case, if we add additional information you can search objects by, such as the news feed status to search for projects, for example.

- We make changes to the way object data is indexed to improve the search functionality.

- You change your account terminology. In this case, you should synchronize all item types that are impacted by the terminology changes so that these changes are reflected in search results.

- There is a problem with the global search functionality, such as missing results. If this is the case, updating the information may help to resolve the problem.

> **Note:** If global search coverage includes coverage the object type, the global search object data is updated automatically if an object is added, deleted, or if any of the information available for search is modified.
>
> The global search object data is deleted automatically if you disable the Global Search feature for your company's SuiteProjects Pro account. It is updated automatically if you enable the Global Search feature again.
>
> The global search object data for a specific object type is deleted automatically if you disable all access to the application that includes this object type. It is updated automatically if you enable access to the module again.

For more information about global search administration, see the help topic Global Search.

> **Note:** The Global Search feature was enabled by default for all accounts with the 2024.2 upgrade. To disable the feature in your company's account, contact SuiteProjects Pro Support.
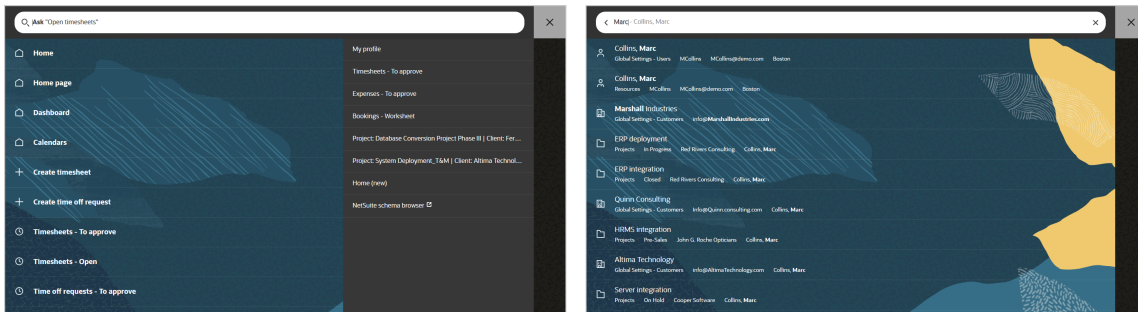
Hide Divider Sections on Forms

With each form that contains a link to **Modify the form permissions**, users have the option to hide entire sections. To hide sections, launch the form permissions from the Tips button, scroll down to **Hidden divider sections**, and select the box for the section to be hidden under the desired role. For example, in the Edit project form, select the box for the "Attachments" section under the User role and Attachments will no longer display on a user's Edit project form.

To enable this feature, contact SuiteProjects Pro Support.

Inline-Editing in Lists

Inline-editing in lists lets you edit records from within the list.

This feature is currently available for the following views only:

- Administration > Global Settings > Organization > Projects
- Projects > Projects

> ℹ️ **Note:** Standard fields for projects supporting inline-editing include Project, Customer, Project owner, Project stage, Transactional budget (hours), Project location, Cost center, Active, Notes, Is a portfolio project, Start date, Invoice layout, Authorizations approver, Project budgets approver, PO approver, Purchase request approver, Bookings approver, Revenue containers approver, Timesheets approver, Invoice approver, Expense reports approver, Project approver 1, Project approver 2, and Project approver 3.
>
> Custom field types supporting inline-editing include Checkbox, Date, Dropdown, Pick list, Text, and Text area.
>
> Custom field types supporting inline-editing include Checkbox, Date, Dropdown, Multiple Selection, Pick list, Text, and Text area.

- Projects > Tasks
- Projects > Projects > [*Select a project*] > Project Center
- Reports > Saved Reports

> ℹ️ **Note:** Currently, the only field for reports supporting inline-editing is Name.

> ℹ️ **Note:** Project, task and report lists on the next-generation homepage do not support inline-editing. For more information about the next-generation homepage, see the help topic Getting Started with the Next-Generation Homepage.

For more information about using the feature, see the help topic Inline-Editing in Lists.

To enable this feature, contact SuiteProjects Pro Support.

List Column Selection

The Columns Selector makes arranging your lists a snap.

Click the Columns button in any list to open the column selection panel for that list.

The panel lets you select the columns you want to see in this list.

- Click any column in the All list to add it to the selected columns.
- Drag a column to reposition it in the list.
- Use the Search bar to filter the columns shown in both the "All" and "Selected" columns by name.

To enable this feature, contact SuiteProjects Pro Support.
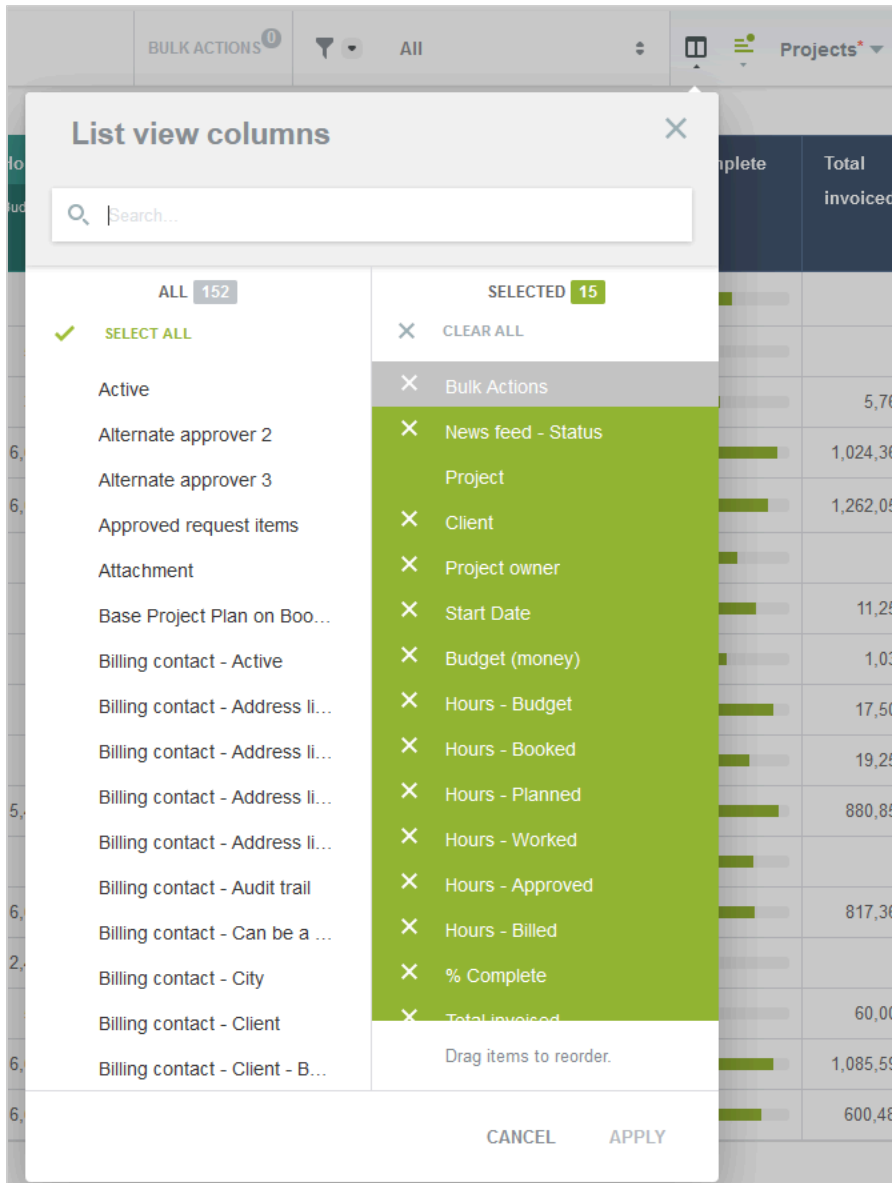
Multicurrency

The Multicurrency feature provides support for transactions in currencies other than your default currency. For example, the feature lets you reimburse employees expenses, invoice customers, recognize revenue, and run reports in multiple currencies. After you enable the feature, you can:

- Set the different currencies your company uses for transactions.
- Set a **Currency** for all relevant entity records and work with multiple currencies in SuiteProjects Pro.
- Download historical currency cross rates as a CSV file.

Additional optional features also give you access to advanced multicurrency functionality, for example:

- The ability to modify historical currency cross rates. See Edit Exchange Cross Rates.

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- The ability to define arbitrary custom currencies for reporting purposes. See User-Defined Reporting Currencies.

To enable the Multicurrency feature and discuss advanced multicurrency functionality, contact your SuiteProjects Pro account manager or SuiteProjects Pro Professional Services.

> ⓘ **Note:** You cannot disable the feature after you create transactions and records that rely upon it.
>
> All SuiteProjects Pro accounts include the capability to create expense receipts in any of the system-supported currencies even if all your business transactions are done in the default currency for your account. You only need to enable the Multicurrency feature if your business uses more than one currency for transactions.

Multiple Schedule Exceptions Per Day by Time Off Requests

Companies often have varying holiday policies that allow for half or partial working days that occur the day before an official holiday. For example, some companies will allow for a half day the day before Christmas. In such a case, some employees may choose to take the rest of the day off as part of their personal time off (PTO).

For accounts that have the company setting "Automatically create schedule exceptions when a time off request is approved" enabled but don't have this feature enabled, a company schedule exception could be entered for the half day. However, for the user to take the rest of the day off, an exception on the user's work schedule would need to be manually created. With this feature, users can enter a time off request even if there is an existing company schedule exception for the same day.

If there is an existing company schedule exception for partial hours, users can create and submit a time off request for that same day (available time permitting). In addition, users can create and submit multiple time off requests for the same day.

> **ⓘ Note:** It is not possible to manually create more than one schedule exception on the same day for a company work schedule or an individual user level work schedule.

To enable this feature, contact SuiteProjects Pro Support.

Next-Generation Homepage

View up to 12 sections of information across three content regions in the next-generation homepage.

> **ⓘ Note:** The next-generation homepage is an optional feature. To enable the feature in your company's account, contact SuiteProjects Pro Support.
>
> When enabled for your company's account, the next-generation homepage is available in addition to the classic homepage because it does not yet offer a new solution for all the classic homepage functionality.
>
> The to-do list introduced in SuiteProjects Pro 2024.2 includes all workflow tasks from the Reminders portlet on the classic homepage, and some workflow tasks from the My status portlet. Workflow tasks in the My status portlet for which you cannot take direct action are not included in the to-do list. For more information about the to-do list, see the help topic To-do list.

Go to Home > Home (new) to view the next-generation homepage. The larger of the three content regions (primary region) shows sections of information as tabs that you can explore one by one. The smaller (secondary) content regions let you view two additional sections of information that are always visible on your homepage, on the right of, or below the primary region.

In SuiteProjects Pro 2024.2, the next-generation homepage supports two types of content:

- List – You can show the most important information from a list on your homepage. Homepage lists have the following differences with full-page lists:
  - The list toolbar and page navigation are not shown for lists on the homepage.
  - Each list on homepage is limited to one page of list data. You can control the maximum number of rows shown when setting up the list for your homepage, or modifying the list setup.
  - Lists on the homepage do not support inline-editing even if the full-page lists for the same object type supports inline-editing.
- Report – You can show data from one of your reports on your homepage.

Account administrators can copy the next-generation homepage setup from one user to other users using the bulk employee change wizard. For more information, see the help topic Next-Generation Homepage Setup.

You can personalize the next-generation homepage, and add, reorganize and change the content in each region to suit your own business needs. For more information, see the help topic Getting Started with the Next-Generation Homepage.

Optional Features

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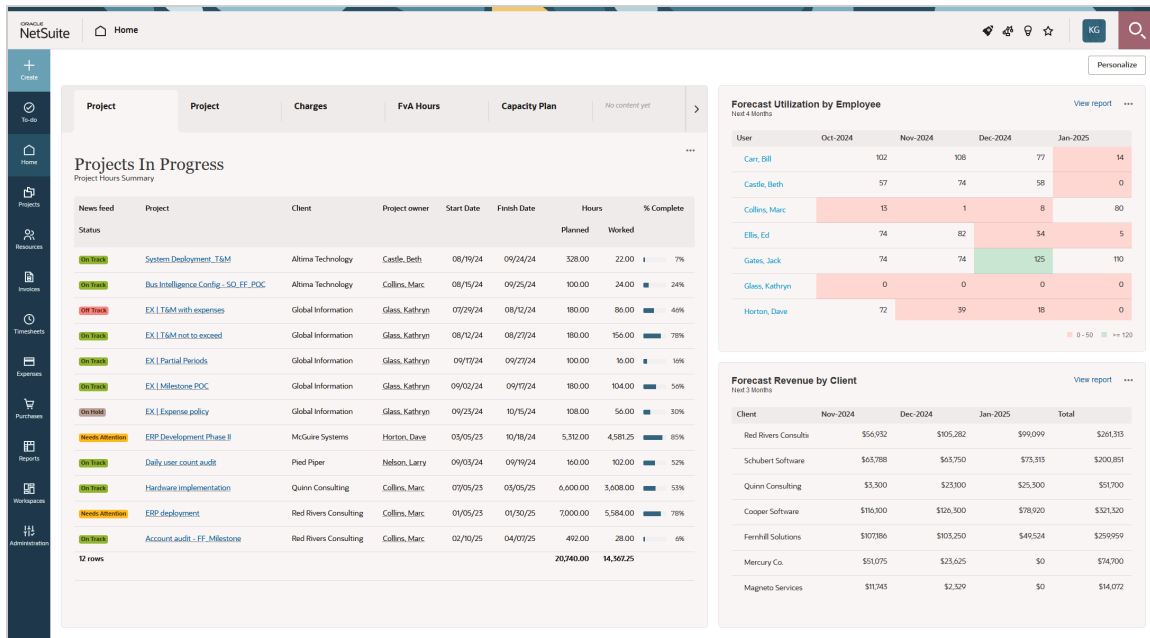
Overlapping Timesheets and Envelopes at the Role Level

With this feature, you can allow different roles to have access to the Overlapping Timesheets and Expense Reports feature.

To enable this feature, contact SuiteProjects Pro Support.

Pick List Custom Field

With this feature, create a custom field with values from existing list data such as users, customers, or projects. The benefit of this feature is that the pick list populates with current account data and thus eliminates the need for an administrator to actively manage the values list of the custom field.

To enable this feature, contact SuiteProjects Pro Support.

Product Updates Panel

View new release highlights and other product updates from the SuiteProjects Pro UI.

Click the Product Updates utility button to view a panel with new release highlights and other product updates. The Product Updates utility button is highlighted after each release to indicate that there are new product updates available. Click **Read More** to view the full release notes in the SuiteProjects Pro Help Center. For more information, see the help topic Product Updates.

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> **Note:** Only account administrators and users with the View Help Center role permission can access the product access panel.

This feature is enabled by default. To disable or enable it, contact SuiteProjects Pro Support.

Proxy Approver Notifications

Add proxy approvers as recipients in notification email messages about new transactions awaiting approval.

Employees with the role permission **Create own proxies** can designate proxy employees who will be able to log in and perform a function on their behalf. If the proxy employee can approve transactions on behalf of the proxied employee and the Proxy Approver Notifications feature is enabled, the proxy employee receives notification email messages when a transaction is submitted for the proxied employee's approval.

> **Note:** Proxy approver notifications are sent only to proxy employee designated as a proxy by the proxied employee.
>
> Proxy approver notifications are not sent if the proxy employee was added by an account administrator or a user with the relevant role permissions on the proxied employee's employee record.

To enable this feature, contact SuiteProjects Pro Support.

Publish Shared Reports using BI Connector

Publish your shared reports with owner or recipient access privileges and take control of the data you've published.

With this feature, shared reports can be published with the same data access privileges as the report owner, or restricted to the access privileges of each report recipient.

The report owner decides when they publish the report, and the administrator controls the publish policy with role permissions.

When publishing reports with recipient permissions, each recipient must then publish the shared report data from SuiteProjects Pro into their business intelligence tool. To access the report, recipients must have either the **Download Reports** or the **Publish Reports** permission to access the report in their business intelligence tool. The data recipients see in the business intelligence tool will be limited to what their own respective privileges allow.

> **Note:** This feature enables the **Enable publishing of shared reports to OData service with owner's permissions** role permission, which allows users to publish shared reports.

To enable this feature, contact SuiteProjects Pro Support.

Query Builder

Use the Query Builder feature to create complex and customized notifications for events throughout SuiteProjects Pro.

Query Builder notification conditions are organized into groups which each contain a condition statement such as "if all of the following conditions are true" or "if none of the following conditions are true". A notification is sent when the conditions you've created are met.

> ⚠️ **Important:** Conditions with groups can only be created with this feature enabled. If you later disable this feature, notifications created when this feature was enabled will be deactivated if they contain groups.

To enable this feature, contact SuiteProjects Pro Support.

To create a notification using Query Builder:

1. Go to Administration > Application Settings > [Select the module settings which requires a notification] > Notifications.

2. Click the Create button and click the type of notification you want to create under "New". The new notification form appears.

3. Enter a "Rule name" for the notification. This name will appear in the Notifications list.

4. In the "Send a notification ..." section, click the dropdown list and select the appropriate condition statement. The following condition statements are available:

   - If ALL of these conditions are TRUE
   - If ALL of these conditions are FALSE
   - If ANY of these conditions are TRUE
   - If ANY of these conditions are FALSE

5. Click the ADD CONDITION button to add new conditions to condition statement. Click the ADD GROUP button to add a new condition statement to which conditions can be added.

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> **ⓘ Note:** You can also add conditions to a group using the + icon under the group's condition statement.

6. In the "Notify" section, select who the notifications should be sent to when triggered.

7. In the "Email message" section, enter the subject of the email which will be sent when the notification is triggered, and any text you would like to have in the Email body. Use the "Field" dropdown list to add variables to the email body.

8. In the "Other" section, select "Active notification" to allow notifications of this type to be sent.

9. Click **Save**.

To delete a group or condition in Query Builder:

1. Click the delete 🗑 icon next to the condition or group you want to delete.

To move a group or condition to a new location within the query in Query Builder:

1. Click the ⫴ icon on the left of the group or condition and drag it to a new location within the query.

> **ⓘ Note:** When you drag a group which has conditions associated with it, both the group and its conditions are moved together.

Quick Audit Trail for Global Settings

The Quick Audit Trail for Administration Settings optional feature enables you to keep track of changes made to Global Settings and determine the impact it has on the account. To enable this feature, contact SuiteProjects Pro Support.

When the feature is enabled, an audit trail icon 🗒 next to the setting label indicates that an audit trail is available. Click the Show audit trail icon to display a popup window showing the account number, the name of the company switch, and a history of changes made, when, and by whom.
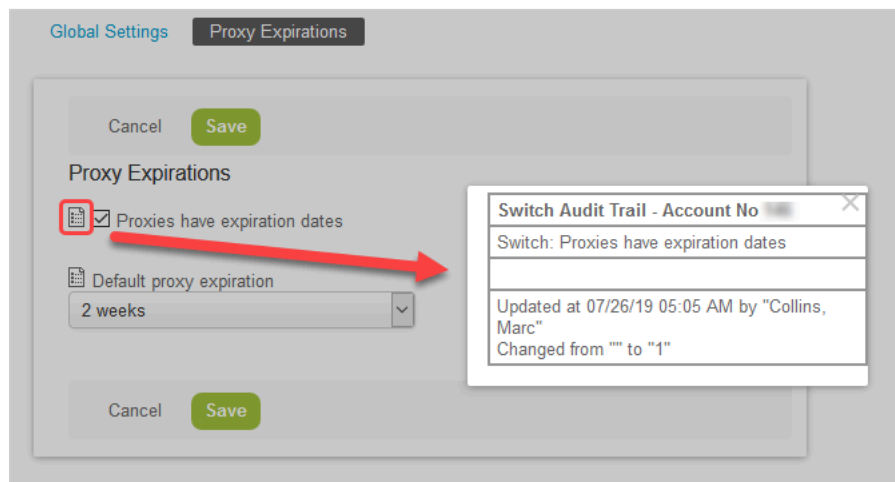
Audit trail information is available on several forms in Administration > Global settings. These include:

- Account
  - ▫ Filter Set Settings

- Integration: SAML Single Sign-on > [*Select a SAML identity provider profile*] (Requires the Self-Service SAML Identity Provider Configuration feature).
    - Optional Features
    - Proxy Expirations
    - Security Options
- Display
    - Email Settings
    - Interface: Display
    - Interface: Other
    - Print Settings
    - Regional Settings
    - Time Settings
- Organization
    - Approval Options
    - Tax Options
- Reports

    Reporting Options

To enable this feature, contact SuiteProjects Pro Support.

Quick Audit Trail for Custom Fields

The Quick Audit Trail for Custom Fields optional feature lets you keep track of changes made to custom fields directly from the entity form. When the feature is enabled, account administrators and users with the **View quick audit trail for custom fields** role permission can access audit information for custom fields.

> ℹ **Note:** The **View quick audit trail for custom fields** role permission is added to the role page when you enable this feature.

Feature extension:

- **Custom Field Extended Audit** — Audit information is supported for all custom field types. However, for custom fields of type Text Area, Pick List, Multiple Selection and Allocation Grid, the custom field audit needs to be converted to an extended audit to include the values before and after the update in the audit trail. The Custom Field Extended Audit feature needs to be enable for your account to convert the custom field audit to an extended audit.

To enable the Quick Audit Trail for Custom Fields feature or Custom Field Extended Audit, contact SuiteProjects Pro Support.

Redesigned Administration Module

This feature introduces a redesigned page header with tab navigation and an overview page for each global settings and application settings section in the Administration module.

The tab navigation lets you go from one page to another without going back to the main overview page. The main overview page listing all global settings pages is now replaced with overview pages for each global settings section (Organization, Display, Users, Account, Jobs, Rates, Reports, Customers, Custom Fields).
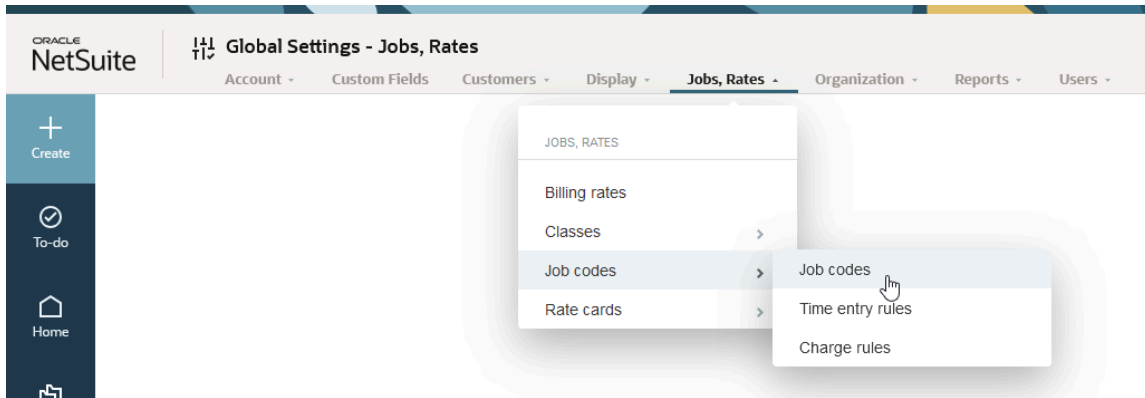
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This feature is enabled by default. To disable the feature, contact SuiteProjects Pro Support.

Redesigned Advanced Filters

Gain usability and canvas space when viewing, modifying or managing advanced filters.

The Redesigned Advanced Filters optional feature changes the user interface for advanced filters on redesigned lists. The redesigned advanced filters panel is compact and lists filter conditions horizontally instead of vertically. It lets you select and apply saved filters directly from the list toolbar instead of the flyout panel.
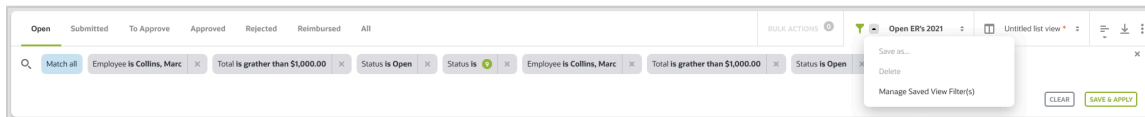
For more information, see ⬛ User Guide.

To enable this feature, contact SuiteProjects Pro Support.

Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata

Replace all non-alphanumeric characters with underscores in your data feed's column titles and metadata.

When this feature is enabled, space characters in column titles are replaced with underscore characters.

Other special characters are also replaced with underscores, including: **%?!@:~`+-#$^ &*()ů!§¨ |**

All non-ASCII, non-alphanumeric characters are replaced also replaced with underscores. In addition, if a column name's first character is a number, an additional underscore will be added at the beginning.

This feature is especially useful for supporting Microsoft SSIS integrations.

To enable this feature, contact SuiteProjects Pro Support.

Restrict Specific Custom Fields from Being Copied

SuiteProjects Pro lets users clone, duplicate, repeat, copy projects, expenses, resources, timesheets, and workspaces. It may bot always be appropriate to copy some information stored in custom fields, as duplicate information on receipts, charges, bookings, billing rules, and tasks could create problems. You can prevent the information stored in these custom fields from being copied across by checking the **Never clone, repeat, duplicate or copy this field** box on the custom field properties form.

To enable this feature, contact SuiteProjects Pro Support.

Single Sign-On Integration Leveraging SAML

The SAML Single Sign-On (SSO) feature lets you use an external identity provider service to manage user access to your company's SuiteProjects Pro account using the Security Assertion Markup Language (SAML) protocol. SAML enables single sign-on (SSO), a scheme that allows users to sign in to one application — the identity provider — and automatically have access to separate applications — the service providers — without having to sign in to each of these other applications separately. It provides a method of secure integration with existing, on-site authentication infrastructures without exposing these services to direct public access, and enables federation of user identity across any number of additional services. SAML works well as a transport for LDAP and other popular authentication back-ends.

The SAML Single Sign-On feature lets you:

- Configure the SAML Single Sign-on feature to work with multiple identity providers.
- Review configured identity providers from a list.
- Configure the profile and upload the metadata XML file for each identity provider.
- Set any identity providers as active. Only active identity providers can be used for service provider or identity provider initiated single sign-on.
- Select one default identity provider. Service provider initiated single sign-on request are sent to the default identity provider when using the SuiteProjects Pro sign-in page for single sign-on users.

Integration: SAML Single Sign-On						
Identity Provider name	**Active**	**Default**	**Notes**	**Updated**	**SAML Identity Provider meta-data**	**Service Provider initiated SSO**
Google	✔		Expires on Dec 01, 2022	09/08/22 07:14 AM	selfservice1_30880.xml	✔
Legacy profile	✔	✔	Expires on Nov 01, 2022	09/08/22 07:14 AM		✔
OKTA	✔		Expires on Jan 01, 2022	09/08/22 07:15 AM	selfservice1_10880_single_line....	✔

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To enable this feature, contact SuiteProjects Pro Support.

Stop Slow Lists

Stop lists which take too long to load. With this feature enabled, SuiteProjects Pro generates a message when the set time threshold has been reached and allow the user to either stop or keep going.

To enable this feature, contact SuiteProjects Pro Support.

Stop Slow Reports

Stop reports which take too long to load. With this feature enabled, SuiteProjects Pro generates a message when the set time threshold has been reached and allow the user to either stop or keep going.

To enable this feature, contact SuiteProjects Pro Support.

Suppress Email Notifications or Add Addresses to Notifications

Users can selectively choose to suppress email notifications when they make changes to bookings, issues, tasks, and projects. For example, a user may not want for a minor modification to trigger an email. To suppress email notifications, when in the edit form of the associated entity, select a box indicating that email notification is suppressed. An email will not be sent to the notification list. Set up a custom field in each entity for the suppress email notification option and it displays in the associated edit forms.

Additionally, users can send notifications to additional recipients who may or may not be SuiteProjects Pro users. These users may include those who may not routinely be notified of task or issue changes. Enter the email addresses in the text box for "E-mail addresses to cc" on the Edit tasks and Create or Edit issues forms. This text box displays the feature is enabled.

To enable this feature, contact SuiteProjects Pro Support.

To-Do List

View a list summarizing items that require your action from any area of SuiteProjects Pro.

Your to-do list is available from any page in SuiteProjects Pro.

To view your to-do list, click the to-do button that is located under the create button in the upper-left corner.
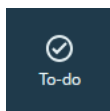
The to-do list is a summary of workflow tasks, that is, tasks that require action from you as part of a workflow or business process. Each entry in the to-do list shows the number of items, the type of items, and the action required for these items.

> ℹ **Note:** The to-do list includes all workflow tasks from the Reminders portlet on the classic homepage, and some workflow tasks from the My status portlet. Workflow tasks in the My status portlet for which you cannot take direct action are not included in the to-do list. For more information about standard portlets on the classic homepage, see the help topic Standard Homepage Portlets.

Click an entry in the to-do list to go to the corresponding item list and complete the action. After you complete the action for all items, the action is removed automatically from your to-do list.

The to-do list can include the following workflow tasks:

- Items that you need to approve.
- Open items that you need to submit for approval.
- Rejected items that you need to verify and submit again for approval.
- Authorizations against which you need to submit expenses.
- Approved purchase request items for which you need to issue a purchase order, and in some cases, identify a vendor.
- Pending tasks that you are assigned to, or booked for.
- Unresolved issues (action items) that you are assigned to.
- Timesheets submitted or approved by a proxy user that you need to review and confirm.

> ⓘ **Note:** The To-Do List feature was enabled by default for all accounts with the 2024.2 upgrade. To disable the feature in your company's account, contact SuiteProjects Pro Support.

Unexport Records from a Specific Application by UI

SuiteProjects Pro lets you mark records as unexported using bulk actions in lists, SuiteProjects Pro API or Integration Manager. Record types supporting this feature include timesheets, expense reports, invoices, and revenue recognition transactions. You can also mark the parent, child, or both records as unexported (for example invoices only, charges only, or invoices and charges).

To unexport records using bulk actions, go to the list for that record type, select the records you want to unexport and click **Bulk actions**. In the bulk action popup window, choose **Unexport the <record type> marked exported to**, select a specific application or `All applications` and select what you want to export (for example timesheets only, time entries only, or Timesheets and time entries)

To enable a user to unexport records of a specific type, go to Administration > Global Settings > Users > Employees > [*Select an employee*] > Demographic. Go to the section of the form for the application (module) corresponding to the record type, and check the **The employee can mark <record type> exported** box.

To enable this feature, contact SuiteProjects Pro Support.

Use Days Instead of Hours for All Time Entries

Enable this feature to use days instead of hours for time entries.

After you enable this feature, go to Administration > Global settings > Work schedule > [select schedule] and change the value for "Work days per day for this company work schedule" from "7.5" or "8" to "1", for example. This should be done for every work schedule, especially those where the number of associated employees is more than zero.

To enable this feature, contact SuiteProjects Pro Support.

> ⚠ **Important:** You should not enable the Timesheets setting **Enable start and end time entry on timesheets** when the feature **Use Days Instead of Hours for All Time Entries** is enabled.
>
> If you enable **Enable start and end time entry on timesheets**, when users enter a start time and end time in timesheets, the duration is calculated in hours and not converted to days.

User-Defined Reporting Currencies

Enable this feature to create user defined currencies for reporting in the Multi-currency tab.

After you have added the currency symbol, name and rate in the Multi-currency tab, the user defined currencies will be available for reporting but not for data entry and will have both the symbol and name displayed in the currency drop-down and report views.

When enabled, go to Administration > Global Settings > [Organization] Currencies > Multi-currency.

To enable this feature, contact SuiteProjects Pro Support.

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Wrap Text in List Cells

You can select to wrap long text and text area field values on multiple lines in list cells with this or display it in truncated form on a single line.

- **Single line** (Default) — By default, redesigned lists display text and text area field values on a single line by default. Line feeds are removed to show more information. lists are more compact. If the entire text does not fit the cell, only part of the text is displayed with ellipses to indicate the text is truncated. To view the full text, point to the cell or click **Read more** inside the cell (for longer text content).

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- **Wrap text** — If the Wrap Text in List Cells feature is enabled for your account, SuiteProjects Pro wraps long text and text area field values on multiple lines in list cells. Lists are less compact. For longer text content, only part of the text is displayed with ellipses to indicate the text is truncated. To view the full text, click **Read more** inside the cell.

Longer text area cell content is truncated whether the wrap text option is enabled or disabled. To view the full text, click **Read more**. The full text appears in a popup box. Click the close icon ✕ , press the Esc key or click outside the box to close the popup box and return to the list.

> **Note:** These display options do not apply to the **description** column in the following lists. The entire cell content is always shown and line feeds are supported.
>
> - Projects > [*Select a Project*] > Financials > Billing > Rules
> - Projects > [*Select a Project*] > Financials > Recognition > Rules

To enable the **Wrap text in list cells** feature, contact SuiteProjects Pro Support.

Timesheets

The following optional Timesheets features are available in SuiteProjects Pro. Some features require SuiteProjects Pro Support to enable them for you.

- Automatically Create Overlapping Timesheet
- Automatically Receive PDF Attachments of Approved Timesheets and Expense upon Approval
- Calculate Remaining Hours Using Approved Hours Instead of Worked Hours
- Configure Time Entry Rounding at the User Level
- Filter Timesheet Report by Project
- Line Item Rejection in Timesheets
- Prevent Entry of Future Time at the User Level
- Proxy Confirmations
- Self-Rejection of Timesheets
- Set the Timesheet Duration At the User Level
- Time Entries Match Task Assignments
- Time Entry Grid Filtering
- Use Zero Hours Rather than Planned Hours for Users' "Hours Remaining" Estimates

Automatically Create Overlapping Timesheet

Auto-create overlapping timesheet for second part of the week at month end. This feature requires use of the 'Prevent the entry of time for different months on single timesheet' feature.

To enable this feature, contact SuiteProjects Pro Support.

Automatically Receive PDF Attachments of Approved Timesheets and Expense upon Approval

Employees within a company may need to download a hard copy of their approved timesheets or expense reports. For example, on occasion, hard copies of expense reports will need to be attached to invoices that are being sent to a customer. Without this feature, users can download a PDF version of the report from within the timesheet or expense report.

With this feature enabled, users can automatically receive a PDF attachment of the approved timesheet report or expense report. A PDF view of the report will be attached to the email notifications for approved timesheet and expense reports.

To enable this feature, contact SuiteProjects Pro Support.

Calculate Remaining Hours Using Approved Hours Instead of Worked Hours

Enable this setting to calculate hours remaining as estimated hours minus approved hours, instead of estimated hours minus worked hours.

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To enable this feature, contact SuiteProjects Pro Support.

Configure Time Entry Rounding at the User Level

Time entries can be entered on a timesheet in different increments. For billing purposes, it may be necessary to round these time entries depending on contractual agreements. For some companies, certain groups of users may need different rounding rules applied based on their location. Currently, time entry rounding rules are applied at the account level for all users. SuiteProjects Pro enables you to configure the time entry rounding option on a per-user basis.

To enable this feature, contact SuiteProjects Pro Support.

Filter Timesheet Report by Project

Project approvers who have the ability to view multiple projects on one timesheet report can use the "Project filter" to view hours for a specific project. The timesheet report refreshes and displays only the hours for the project selected. This provides a quick way to ascertain the number of hours on a timesheet applied against a specific project.

To enable this feature, contact SuiteProjects Pro Support.

Line Item Rejection in Timesheets

Use line item rejection in timesheets to streamline operations. Instead of delaying the invoice process because of an error in one time entry, reject the entry in question and continue to process the timesheet and invoice the already approved entries. This permits users and managers to save time for approvers while viewing individual entries.

To enable this feature, contact SuiteProjects Pro Support.

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> **Note:** If timesheet rules are configured, administrators can choose to have the rule ignored upon the resubmission of rejected time entries. To enable this option, go to Administration > Application Settings > Timesheets > Timesheet rules. Check the option **Ignore rules on submission of timesheets with individually rejected time entries** and save. Users will not see warnings or errors for timesheet rules if submitting a timesheet that contains rejected time entries.

Prevent Entry of Future Time at the User Level

Users can log time that has been worked on different projects in SuiteProjects Pro. However, for compliance purposes, managers may want to have their employees only enter time for the current week's timesheet and restrict the ability to enter time entries for future dates. Other existing functionality prevents all users from entering time for future dates. If your company policies allow some users to enter time for future dates, but not others, you can prevent time entry for future dates on a per-user basis.

To enable this feature, contact SuiteProjects Pro Support.

Proxy Confirmations

The Proxy User feature lets proxy user sign in on behalf of another user to either submit or approve a timesheet. Allowing users to proxy in as other users may prevent delays in the billing process. For compliance purposes it may be required that the original submitter or approver of a timesheet confirm acknowledgment that the proxy action has taken place.

For example, if Mary Adams was on vacation and Bill Carr submitted her timesheet on her behalf, Mary Adams would need to confirm the timesheet to acknowledge that Bill submitted it on her behalf. This feature enhances the proxy capabilities to allow users to view which timesheets need to be confirmed by them due to proxy submission or approval.

When enabled, existing role settings will need to be modified to allow for timesheet confirmations. All newly created roles will have the option enabled automatically. To modify a role, go to Administration > Global Settings > Users > Roles > [select a role]. Select the option **View confirmed timesheets**.

- A new dashboard link, **X Timesheets awaiting your confirmation**, under the **Reminders** section will indicate to the user that there are timesheets waiting for their confirmation. When clicked, users will be brought to the **Confirmed** tab in the Timesheets list.

- A new tab for "Confirmed" is now available under the Timesheets tab. If there are timesheets waiting for confirmation because of a proxy submission or approval, those timesheets will be listed under the sub-links "Submitted waiting my confirmation" or "Approved waiting my confirmation". The "All" sub-link will list any timesheet that needs to be confirmed by a user. Timesheets that are bolded indicate timesheets that specifically need attention from that user.

- As part of the timesheet "Approval history", timesheets will have an additional status of [Confirmed], [Confirmation reject], or [Confirmation pending] to indicate that some confirmation action is needed or has been made.

- For auditing purposes, the Timesheets detail report now contains the report values "Submission confirmed by" and "Approval confirmed by" to indicate who confirmed the timesheet. Additionally, two additional filters for "Submission confirmation status" and "Approval confirmation status" have been added to filter results based on the confirmation status of timesheets. For example, managers can run the report and filter on "Confirmation Pending" to view all timesheets that have not yet been confirmed by anyone. To access the Timesheets detail report, go to Reports > Detail > Timesheets.

To enable this feature, contact SuiteProjects Pro Support.

Self-Rejection of Timesheets

When an employee submits a timesheet prematurely and wishes to make changes, the process required the entire timesheet to be rejected by an approver - whereupon changes can be made. With this feature, users can reject their own timesheet, thus eliminating the need for approvers to reject unnecessary incorrect timesheets.

Users will have the ability to reject their own timesheets if no approvals have occurred. When rejected, the timesheet will be moved to the "Rejected" status where the user can modify specific time entries and resubmit for approval. The approval history for that rejected timesheet will indicate that the owner has rejected the timesheet, and include any explanation.

> **Note:** If line item rejections are enabled and specific line items on a timesheet have not been approved, each line item can be rejected by the timesheet owner.

> **Note:** Approved timesheets cannot be rejected. Users can only reject their own timesheets if they haven't been approved or rejected already by an approver.

To enable this feature, contact SuiteProjects Pro Support.

Set the Timesheet Duration At the User Level

This feature permits your users to set their own timesheet duration, overriding the default duration.

To enable this feature, contact SuiteProjects Pro Support.

Time Entries Match Task Assignments

When this feature is enabled, if a user submits their timesheet they will receive an error if the time entry date is not within the task's start and end date (inclusive) range.

This is a account-wide setting that can be overridden on a per-task basis by the selection of a checkbox custom field.

To enable this feature, contact SuiteProjects Pro Support.

Time Entry Grid Filtering

Use a hierarchy filter to limit the number of Customer:Project entries that display on a timesheet grid. Different types of hierarchies can be created for geographic locations or business units, or even for types of work or other characteristics that make sense for your company. When all users can view all projects, this feature helps reduce the size of these lists, making them more manageable. Select the setting for using the hierarchy as the primary project drop-down filter and assign projects to a hierarchy node. When a user specifies a node on the timesheet grid, the projects within that hierarchy are easy to locate.

To enable this feature, contact SuiteProjects Pro Support.

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Use Zero Hours Rather than Planned Hours for Users' "Hours Remaining" Estimates

This setting uses "0" for "Hours Remaining" estimates rather than using planned hours. This setting only affects project outline and lists.

To enable this feature, contact SuiteProjects Pro Support.

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Expenses

The following optional Expenses features are available in SuiteProjects Pro. Some features require SuiteProjects Pro Support to enable them for you.

- Adjust an Approved Expense Report
- Automating Tax Location
- Foreign Currency Receipts in Expense Grid
- View All Receipts on One List

Adjust an Approved Expense Report

This feature enables users with the **Adjust approved expense reports** role permission to create offsetting receipts in an 'adjusting expense report' using a bulk action in the receipts list for the approved expense report. This can be used, for example, to zero one or more receipts in an approved expense report.

To adjust approved expense report receipts, go to Expenses > Expense reports > [*Select an approved expense report*] > Receipts, select the receipts you want to adjust, and click **Bulk actions**. In the bulk action popup window, choose **Adjust selected receipts** and select whether you want to create offsetting receipts or create offsetting receipts and duplicate receipts from the dropdown options.

To enable this feature, contact SuiteProjects Pro Support.

When enabling this feature, SuiteProjects Pro Support will need to configure it using the following settings:

- **Approval of expense reports adjustments**

  The following options are available:

  - Always require approval for adjusted expense reports
  - Do not require approval for adjusted expense reports
  - Require approval for adjusted expense reports only if net reimbursement amount is not zero

- **Accounting date of adjusted expense reports**

  The following options are available:

  - Adjusted expense reports have accounting date set by accounting date rules
  - Adjusted expense reports have accounting date of original envelope

- **Accounting date of receipts in adjusted expense reports**

  The following options are available:

  - Adjusted expense report receipts have accounting date of original receipt
  - Adjusted expense report receipts have accounting date set by accounting date rules

> ⓘ **Note:** Expense reports with net negative totals cannot be exported to systems that do not expect negative transactions, such as NetSuite. This may affect your usage of the expense report adjustment feature.

Automating Tax Location

When using input tax on expenses, one expense item could be taxed using several different tax locations depending on where the expense was incurred. For example, an expense item of "Meals" may be taxed

at 10% in Germany, 15% in France and 20% in the UK. Expecting an employee to select the correct tax location for every expense item is unreasonable. Furthermore the list of tax locations from which to pick in enterprise international accounts can become long and with no filtering or defaulting by employee extremely cumbersome to use.

To ease expense entry and minimize user error, SuiteProjects Pro can default a tax location for a receipt based on:

- The expense item
- The geographical location in which the expense was incurred (defaults to the user's home location)

With this feature enabled, a user can (1) mark where a specified expense was incurred and (2) SuiteProjects Pro can then automatically calculate the correct taxes based on the home location of user. The user can override this calculation if necessary.

> **ⓘ Note:** The calculation fields are highlighted if the user overrides the calculation. The user can reset back to the calculated values by clicking the **RESET TO DEFAULT** button.

To setup this feature your administrator needs to:

- **Administration > Application Settings > Tax Locations** - Create the required tax settings.

  > **ⓘ Note:** You should use this for tax settings and not for tax locations.

- **Administration > Application Settings > User Locations** - Create the required user locations.

Administration > Application Settings > Expenses > Expense item - Fill out the new grid to match **User location** to **Tax location** combinations for the expense item.

To enable this feature, contact SuiteProjects Pro Support.

Foreign Currency Receipts in Expense Grid

When creating an expense report that contains foreign currency receipts, by enabling this feature users can now enter and view information for all foreign currency receipts in the Expense Grid. The Expense Grid displays different currencies and associated exchange rates for the receipts. When the grid is saved, amounts are converted to the expense report default currency for reimbursement and will appear in the default currency on the expense report. If company settings allow, exchange rate amounts can also be modified in the Expense Grid.

> **ⓘ Note:** If company settings mandate that the receipt currency match the envelope or user's default currency, the Exchange rate for foreign currency receipts is displayed as read-only. The ability to modify exchange rate information is also based on the company Foreign currency receipt type selection. To select the Foreign currency receipt type, users with required role privileges can go to Account > Company > Settings > Expenses Options and select either "Modifiable exchange rate based on the current date," "Non-modifiable exchange rate based on the receipt date," or "Non-modifiable exchange rate based on the receipt date. Ignore rate overrides."

To enable this feature, contact SuiteProjects Pro Support.

View All Receipts on One List

View expense receipts sorted and filtered as required.

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To enable this feature, contact SuiteProjects Pro Support.

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Projects

The following optional Projects features are available in SuiteProjects Pro. Some features require SuiteProjects Pro Support to enable them for you.

- Access All Tasks
- Additional Functionality for Expense Policies on Per-Project Basis
- Adjust Planned and Assigned Hours Based on Actual Work
- Allow employees with appropriate permissions to add project based items when they do not have permission to modify the project
- Allow Users to Unapprove Budgets
- Apply Phase Filtering in Time Billing Rules
- Automated Search Engine for Booking Creation
- Automatically Add New Users to Assignment Groups
- Customer Contact Information in Project Properties
- Close a Task for a Specific Employee for Timesheets and Expenses
- Control Editing Submitted Entities by Approvers via Role Permissions
- Date Filters Support for Incurred Vs. Forecast Revenue Recognition Transactions
- Default Options on Task Assignment
- Define Charges to Recognize in "As Billed" Revenue Recognition Rules
- Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets
- Exclude Project from Charge Projections
- Hide the Daily, Weekly, or Monthly Resource Planner Options
- Hide the Project Progress Bar
- Inline Editing, Drag-and-Drop Functionality, and Enhanced Gantt Layout
- Inline-Editing in Lists
- New "Booking Type" Filter in Revenue Recognition Rule
- One Project Per Expense Report
- Optionally View and Assign Revenue Hours for Recognition Transactions
- Phase/Task Filter in "Incurred vs. Forecast Rule"
- Portfolio Projects and Subordinate Projects
- Prevent Invoicing and Revenue Recognition on a Per-Project Basis
- Prioritize Recorded Time Over Booked Time for Charge and Revenue Recognition Projection
- Project Assignment Profiles
- Project Budget
- Project Center
- Project Status News Feed
- Project Status Summaries (PSS)
- Restrict Project Recalculation to Tasks Impacted by the Changes on the Project Outline, Gantt and Task Detail View
- Select Different Currencies for Loaded Cost Overrides
- Single Billing Cap Across Multiple Subprojects Within a Portfolio Project
- Show Billing Rules on Revenue Recognition Forms
- Task Worksheet
- Task on Purchase Requests

- User-Level Outline View
- View Tasks for Inactive Projects in Task List

Access All Tasks

By default, employees can only enter time or expenses against the tasks that are assigned to them. When enabled, this feature allows employees to access, and to enter time and expenses against all tasks in the projects they have access to.

> ⚠ **Important:** This feature and the Close a Task for a Specific Employee for Timesheets and Expenses optional feature are mutually exclusive. It is not possible to enable both features for your account. See also Close a Task for a Specific Employee for Timesheets and Expenses.
>
> Consider all implications carefully before you enable this feature. When enabling this feature, ensure that employees only have access they need using all access control features. For more information about access control, see the help topic Configuring and Using Access Control.

Additional Functionality for Expense Policies on Per-Project Basis

SuiteProjects Pro enables you to limit expense items on a per-project basis. Configuring expense policies on a per-project basis permits companies to dictate different policies based on the work being done. Work performed in different countries may have different policies for projects. Expense policy functionality has been further extended to include additional expense policy options at the project level.

With this feature, you can define what expense items can be selected on an expense report based on the project selection. This feature also adds a new expense policy description field where you can describe a particular project's expense policy.

To enable this feature, contact SuiteProjects Pro Support.
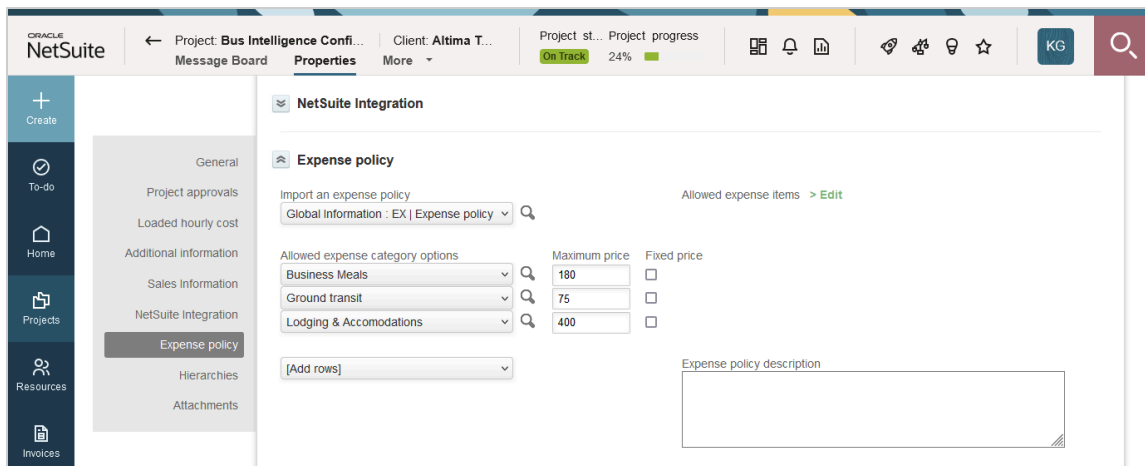
Adjust Planned and Assigned Hours Based on Actual Work

Project managers can assign hours for specific individuals assigned to the task. Often, managers will compare the number of hours that have been assigned against the number of hours worked thus far. As

work is being done on the task, it is beneficial for managers to run accurate forecasting reports based on actuals.

For forecasting, it is ideal to have past planned and assigned hours updated to equal the approved hours. By default, updating the planned and assigned hours must be done manually manual process. When this feature is enabled, SuiteProjects Pro can streamline the process for updating planned and assigned hours based on actual worked hours on a per-task and per-user basis. Planned and assigned hours in the past are adjusted to equal approved hours and future planned and assigned hours can be recast.

There are three ways to recast future task assignment hours:

1. Adjust end date of the task or tasks, keeping current users' allocation. In this case:
   - Percent of user's time will not be changed.
   - End date will be moved so that future planned hours equals remaining unworked hours.
2. Keep end date of tasks, adjusting users' allocation. In this case:
   - End date will be preserved.
   - User allocation will be adjusted so that future planned hours equals remaining unworked hours.
3. Task is finished. Remove remaining planned hours.

To enable this feature, contact SuiteProjects Pro Support.

Allow employees with appropriate permissions to add project based items when they do not have permission to modify the project

This optional feature lets employees with appropriate role permissions add project based items even if they do not have permission to modify the project.

By default, to add a project based item, employees:

- Must have the permission to modify the project. They must have any of the following:
  - Role permission **View and modify projects**.
  - Role permission **View and modify existing projects, but not create new projects**.
  - Explicit permission to modify a specific project controlled by the **Allow only the project owner or administrator or the selected employees to edit the project** option on the Project properties form (Projects > [*Select a project*] > Properties).
- Must have the appropriate role permission to view and modify, or to modify and create the project based item. For example:
  - **View and modify issues**, to add an issue.
  - **View and modify budgets**, to add a transactional budget.
  - **Create and modify project billing rules**, to add a project billing rule.
  - **Modify and create recognition rules**, to add a recognition rule.
  - **Modify and create recognition transactions**, to add a recognition transaction.

With this optional feature enabled, employees only need the appropriate role permission to view and modify, or to modify and create the project based item. Permission to modify the project is no longer required.

To enable this feature, contact SuiteProjects Pro Support.

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Allow Users to Unapprove Budgets

Give selected users the power to unapprove budgets. To enable this feature for a user, go to Administration > Global Settings > Users > Employees > [Select a user ID], scroll to Projects Options, select the "Allow the employee to unapprove a project budget" option, and click **Save**.

To unapprove a budget, go to Projects > Projects > [Select a project] > Project budgets > [Select an approved project budget] > click the edit icon, and click Submit/Approve. In the Approval History page, click the "Click here" link in the unapprove message to unapprove the budget.

Approval history		
Status: Approved		
Date/Time	Action	Notes
09/14/16 05:14 AM	Submitted for approval by Marc Collins	
09/14/16 05:14 AM	Approved by Marc Collins	Automatic approval: The approver is the same employee as the submitter
You can un-approve this project budget. Click here to continue.		

Apply Phase Filtering in Time Billing Rules

You can create extensive project plans that include phases, sub-phases, and tasks in SuiteProjects Pro. For companies that have large project plans and leverage the existing task filter on time billing rules, it may be beneficial to have all newly created tasks picked by billing without the need to manually add the new task to the billing rule filter. For example, there may be a phase in the project plan called "Billable" and any task within that phase should be picked up for billing and all other tasks outside of that phase should not.

Without this feature, these tasks would need to be added to the Task filter within the time billing rule. In addition, any new task that is created under that phase would need to be manually added to the filter. You can also set up time billing rules to filter by phases. If a phase is selected in the filter, all tasks that are a part of that phase will be processed by billing. In addition, if a parent phase is selected, all tasks within that parent phase as well as any sub-phases will be picked up by billing.

To enable this feature, contact SuiteProjects Pro Support.

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Automated Search Engine for Booking Creation

This feature lets project manager assign generic resources to projects and tasks, or define the required skill set (assignment profile) for each project or task, then search for matching resources and select the resources to book. After the project manager selects the resources to book, SuiteProjects Pro will:

- Create bookings automatically for the best matched resources based on search results.
- Initiate the booking approval process.
- Substitute generic resources for specific resources automatically when the bookings are approved.

Example 1. Example of use

As a project manager, you would typically work through the following steps:

1. Create a project plan with tasks.
2. Assign generic resources to tasks. You can also select an assignment profile for each task if the Project Assignment Profile optional feature is enabled for your company's SuiteProjects Pro account.
3. Launch the generic resource booking search. The search returns the best matching resources.
4. Preview search results and select the resources you want to book.
5. Select the option to create and submit the bookings for approval automatically.
6. SuiteProjects Pro creates the bookings and initiates the booking approval process.
7. After a booking is approved, SuiteProjects Pro replaces automatically the generic resource with the specific resource booked.

To enable this feature, contact SuiteProjects Pro Support.

> **Note:** The Resource Booking Approvals optional feature must also be enabled for your account. See Resource Booking Approvals.
>
> To let project managers search for resources based on the required skill set instead of generic resources, enable the Project Assignment Profile optional feature. See Project Assignment Profiles.

Automatically Add New Users to Assignment Groups

Companies that leverage assignment groups are able to assign a group of users to certain projects and tasks for time and expense entry. This is beneficial for assigning all employees in the company to internal projects such as time off or administrative projects. Currently, any new user that is created will have to be manually added to any applicable assignment groups.

When this feature is enabled, you can set up SuiteProjects Pro to add a new employee automatically to any assignment group when the employee record is created. To do so, go to the assignment group properties form (Administration > Application Settings > Projects > Assignment Groups > [*Select an assignment group*]) and check the **Automatically add new employees to this assignment group** box.

> **Note:** When the **Automatically add new employees to this assignment group** checked, SuiteProjects Pro adds an employee to the assignment group only when you create the employee record, not when you update the employee record.

To enable this feature, contact SuiteProjects Pro Support.

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Customer Contact Information in Project Properties

This feature lets you identify key customer contacts at the project level.

- You can select and edit existing contacts, or add new contacts on the project properties form. When you select an existing contact, the contact information (Name, email, phone number, etc.) appears in the project properties form.

- You can add contact information in projects lists and on tabular (detail) and crosstabbed (summary) reports. The following table lists the supported contact fields:

Active	Address line one	Address line two	Audit trail	Can be a billing contact
Can be a shipping contact	Can be a sold to contact	City	Customer	Customer — business type
Country	Created	Email address	Fax number	First
Internal id	Internal ID — customer_id	Job title	Last	Mobile number
Name	Notes	Phone number	Project status	State/Province
Title	Type	Updated	Zip/Postal code	

To enable this feature, contact SuiteProjects Pro Support.

> **(i) Note:** Contact fields are also available on lists and reports if any of the following settings are enabled for your account:
>
> - Enable shipping contacts (Administration > Application Settings > Invoices > Other settings)
> - Enable sold to contacts (internal)

Altima Technology ERP integration

Project name *
[ERP integration]

Client *
Altima Technology

Project manager
[Porter, Marie ▼] 🔍

Main project contact
[A. Jones ▼] > **Create**
> Edit
Email: ajones@AltimaTechnology.com
Mobile: 617.322.3388

Project stage
[Active ▼]

Start date (MM/DD/YY) *
[05/06/12] 🗓

Budget (hours)
[1000]

Currency
[USD ▼]

Budget (money)
Net revenue   Pass through
[250000]   [   ]

Cost center
[01-Boston ▼]

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Close a Task for a Specific Employee for Timesheets and Expenses

Restrict named employees from entering or submitting time or expenses against a task.

When enabled, the following boxes are available for each assignment row on the task properties form:

- **Closed for timesheets** — Check this box to prevent the employee assigned to the task from doing either of the following:

  - Entering time against this task – The task is not available for selection when the employee adds a new time entry.

  - Submitting a timesheet including time entries against this task – When attempting to submit the timesheet, SuiteProjects Pro returns an error advising the employee that the task is closed.

- **Closed for expenses** — Check this box to prevent the employee assigned to the task from doing either of the following:

  - Entering expenses against this task – The task is not available for selection when the employee creates a new receipt.

  - Submitting a timesheet including time entries against this task – When attempting to submit the expense reports, SuiteProjects Pro returns an error advising the employee that the task is closed.

This enables account administrators and users with the necessary role permission to restrict named assignees from entering or submitting time or expenses against the task. This is may be helpful when a project manager does not want assignees to submit time or expenses against the task after their work on the task is completed.

To enable this feature, contact SuiteProjects Pro Support.

> ⚠ **Important:** Review the following guidelines:
>
> - This feature and the Access All Tasks optional feature are mutually exclusive. If employees can access all tasks and can enter time and expenses against all tasks in projects they have access to, the Close a Task for a Specific Employee for Timesheets and Expenses optional feature cannot be enabled. For more information about the Access All Tasks feature, see Access All Tasks.
>
> - The **Closed for timesheets** or **Closed for expenses** are not available if your company's SuiteProjects Pro account is configured to use a scrolling picker to assign employees to tasks.
>
> - Depending on your company's SuiteProjects Pro account configuration, the task properties form may include a **Allow all users to log time and expenses to this task** checkbox. If the **Allow all users to log time and expenses to this task** box is checked, checking the **Closed for timesheets** or **Closed for expenses** has no effect – the assignees are still able to enter and submit time or expenses against the task.
>
> - The SuiteProjects Pro Mobile and SuiteProjects Pro OffLine add-on services support this feature. To ensure full support, you should check the **Show only clients and projects with open tasks assigned to the employee** box on the Administration > Application Settings > Expenses > Other Settings and Administration > Application Settings > Timesheets > Other Settings.

Control Editing Submitted Entities by Approvers via Role Permissions

By default, account administrators can control whether approvers can edit submitted items awaiting their approval using the relevant application settings.

With this feature, account administrators can control which approver can edit submitted items awaiting their approval using role permissions.

To enable this feature, contact SuiteProjects Pro Support.

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Date Filters Support for Incurred Vs. Forecast Revenue Recognition Transactions

Include only the approved time entries, approved expenses and fulfilled purchase items for the specified date range when generating revenue recognition transactions using 'incurred vs. forecast' recognition rules.

You can use this feature, for example, if you run revenue recognitions for the previous month (for example, November) a few days into the current month (for example, December 6) and you only want to include approved time entries, approved expenses and fulfilled purchase items for the previous month (for example, November 1–30) in revenue recognition transactions.

- With this feature enabled, only the approved time entries, approved expenses and fulfilled purchase items entries up to and including the specified end date (for example, November 30) will be included in revenue recognition transactions.

- If the feature is not enabled, revenue recognition transactions include all approved time entries, approved expenses and fulfilled purchase items up to and including the date you run the revenue recognition (for example, December 6). This may include not only approved time entries, approved expenses and fulfilled purchase items for the previous month (for example, November) but also for the current month up to the date you run the revenue recognition (for example, December 6).

To enable this feature, contact SuiteProjects Pro Support

Default Options on Task Assignment

Establish default values for task assignment custom fields for new tasks. Easily update any of the default values for some or all project tasks using the task assignment change wizard. This feature saves an enormous amount of time and effort. When default values associated with a user or group are entered, they automatically populate on each task to which the user or group is assigned. In addition, as changes become necessary, they can be made to multiple tasks at one time.

To use this feature, go to to Projects > Create new form. Enter the form information and Save it. Then, in the Projects list, select a project. Select "Task assignment" from the Phases/Task dropdown. Next, enter the default information for each resource or group who will be assigned to a task in the new project, and click Save. Finally, create phases and tasks for the project. The default task assignment custom fields are displayed, and when resources are assigned, the default resource information automatically populate the custom fields.

To enable this feature, contact SuiteProjects Pro Support.

Define Charges to Recognize in "As Billed" Revenue Recognition Rules

You can recognize revenue based on various criteria in SuiteProjects Pro. Specifically, the "As billed" revenue recognition rule permits companies to recognize all revenue generated from charges. This feature adds functionality to allow users to configure each as-billed rule to recognize revenue based on the invoiced status of charges as well.

To enable this feature, contact SuiteProjects Pro Support.

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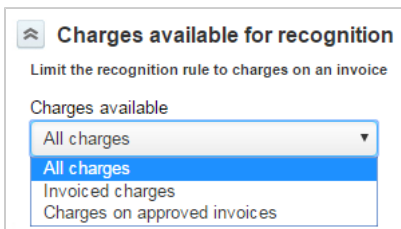
Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets

See what impact your planning has on the final project price.

This feature adds Estimate at Completion (EAC) and Estimate to Complete (ETC) columns to your budgets' total columns in the budget, actuals, and compare views. When you save changes to your budget, the EAC and ETC fields update to account for the changes.

- **Estimate to Complete** – The Estimate to Complete (ETC) is used for forecasting the funding needed to finish the project at any point. The calculated value includes all planned budget values from the pivot date until the last project budget entry. The pivot date is set in Administration > Application Settings > Projects > Project Budget Options.

- **Estimate at Completion** – The Estimate at Completion (EAC) is used for forecasting the overall cost of the project. The calculated value includes all actual budget values before the pivot date and Estimate to Complete values from the pivot date until the last project budget entry. The pivot date is set in Administration > Application Settings > Projects > Project Budget Options.

ETC and EAC values can also be used in several types of crosstabbed and detail reports. In addition, you can use the **Inception to Date (ITD)** field in reports:

- **Inception to Date** – The Inception to Date (ITD) is the amount of money spent from the beginning of the project until today, or until the pivot date set in Administration > Application Settings > Projects > Project Budget Options.

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This feature also allows you to set a baseline budget which is used as the main point of comparison against a project's actual data and other budgets for that project in reporting. A budget with any type of status (open, approved, submitted, archived) can be marked as a baseline.

> ℹ️ **Note:** Each project can only have one baseline budget.

To enable this feature, contact SuiteProjects Pro Support. This feature also requires the **Project Budgets** feature.

Exclude Project from Charge Projections

Exclude selected projects from charge and recognition projections.

To use this feature, create a custom field and use the following custom field settings:

- **Add a custom field to** (Associated record type): Project
- **Add a field of this type**(custom field type): Checkbox
- **Field name**: exclude_from_projections
- **Display name**: Exclude project from charge and recognition projections

For more information about creating a custom field, see the help topic Creating and Modifying Custom Fields.

After you have created the custom field, to exclude a project from charge or recognition projections:

1. Go to the project properties form (Projects > Projects > [*Select a project*] > Properties).
2. Check the **Exclude project from charge and recognition projections** box.
3. Click **Save**.

To enable this feature, contact SuiteProjects Pro Support.

Hide the Project Progress Bar

The % complete progress bar can now be hidden in projects for the whole account. This is useful for customers that don't use the % complete metric and calculate project progress in another way.

To enable this feature, contact SuiteProjects Pro Support.

Hide the Daily, Weekly, or Monthly Resource Planner Options

Use this option to hide the Daily, Weekly, and Monthly options in the Resource Planner.

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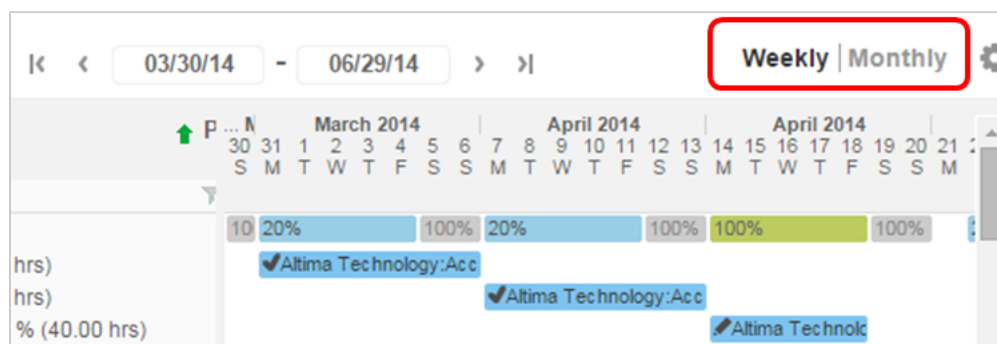
To enable this feature, go to Administration > Application Settings > Resources > Other settings and select any or all of the following options:

- Disable daily option in resource planner.
- Disable weekly option in resource planner.
- Disable monthly option in resource planner.

Inline Editing, Drag-and-Drop Functionality, and Enhanced Gantt Layout

Reorder tasks by dragging them to new positions or create dependencies from one task to another. Use inline editing to change the task name or predecessor.
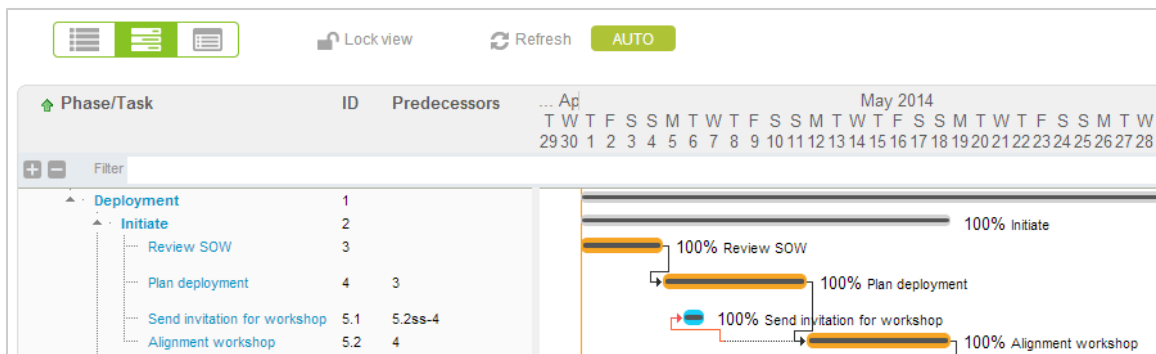
For Project Outline view:

- In-line editing of task name, ID, predecessor or start and end dates
- Reorder of task, phase, milestone by dragging to new positions
- Modify order of columns by dragging to new positions

For Gantt view:

- Set dependency by dragging from one task to another
- Drag task to different date or chance start or end date
- Outline view and Gantt as one view

To enable this feature, contact SuiteProjects Pro Support.

New "Booking Type" Filter in Revenue Recognition Rule

You can recognize revenue on a per-project based on different rules and criteria in SuiteProjects Pro. The Incurred vs. forecast rule permits revenue to be recognized based on how the project is progressing against the project plan. Revenue is recognized by dividing the incurred costs by the forecasted costs, multiplied by the revenue that is to be recognized. The incurred and forecast costs can include a combination of labor, expenses, bookings, or purchases.

SuiteProjects Pro enables you to include a booking type filter leveraging bookings in the forecasted cost calculation. This may be beneficial if the forecast option is configured to use "Approved and booked hours multiplied by user cost" option and would like to exclude bookings that have a booking type of "Tentative" from the calculation.

To enable this feature, contact SuiteProjects Pro Support.
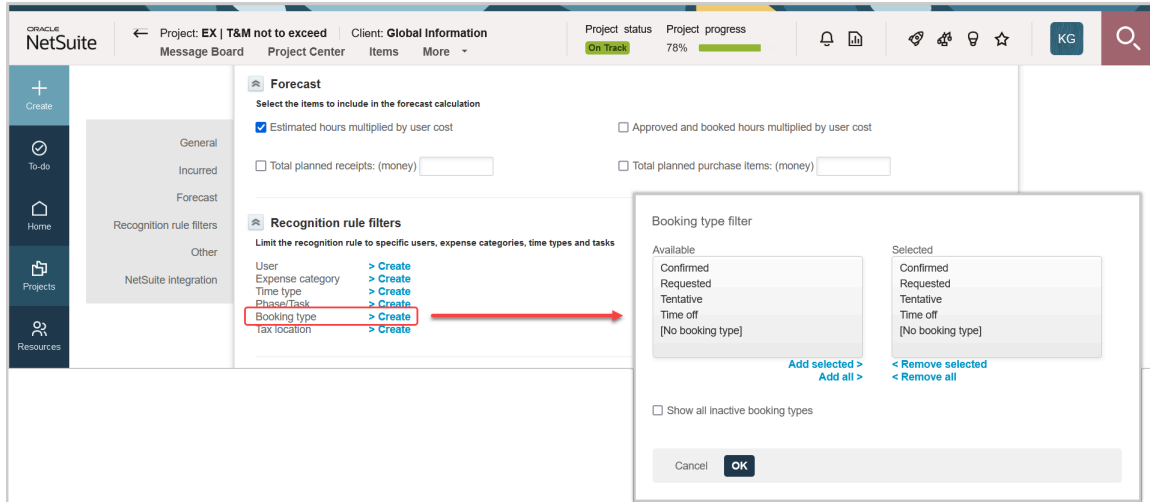
One Project Per Expense Report

At times, companies may only want users to enter one project on an expense report for invoicing purposes. In addition to the expense policies options, users now have the ability to restrict an expense report to one project. With this feature enabled, when users create an expense report, the customer:project selection is done at the expense report level. All subsequent receipts created will be associated with that customer:project.

When the project has been selected, the customer:project dropdown will be read-only on the receipt form and locked on the expense worksheet.

> **ⓘ Note:** If the selection for the customer:project is modified at the expense report level after receipts have been entered, all receipts will be changed to the new customer:project. Since a new customer:project is now associated with the receipts, the expense items and task selection will be cleared from the receipts.

To enable this feature, contact SuiteProjects Pro Support.

Optionally View and Assign Revenue Hours for Recognition Transactions

Typically, an "As billed" or "Time project billing" recognition rule is created to generate the total revenue amount based on hourly charges. In addition to seeing the total recognized revenue, it is beneficial to view the total recognized hours specifically for transactions generated from hourly charges. This feature adds two enhancements to the revenue recognition functionality which allow users to view and modify revenue hours for recognition transactions.

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The ability to display the revenue hours for each recognition transaction has been enabled for all accounts. To disable the display of revenue hours, users with the appropriate role privileges go to Projects > Projects > [select a project] > Financials > Recognition. Select the "As billed" or "Time project billing" rule and clear the **Populate hours in recognition transactions** box. This functionality can be disabled on a per rule basis. At times it may be necessary to create a manual transaction with varying revenue hours or edit an existing system generated transaction. For companies that allow users to manually create revenue recognition transactions, time (in hours and minutes) can be entered for each transaction.

> (i) **Note:** Form permissions have been added to the revenue recognition transaction form. Time for existing recognition transactions can also be modified.

To enable this feature, contact SuiteProjects Pro Support.

Phase/Task Filter in "Incurred vs. Forecast Rule"

With this feature enabled, the Projects > [select Project] > Financials > [create Incurred vs. forecast rule] form shows Phase/Task instead of Task in the **Recognition rule filters** section.

To enable this feature, contact SuiteProjects Pro Support.
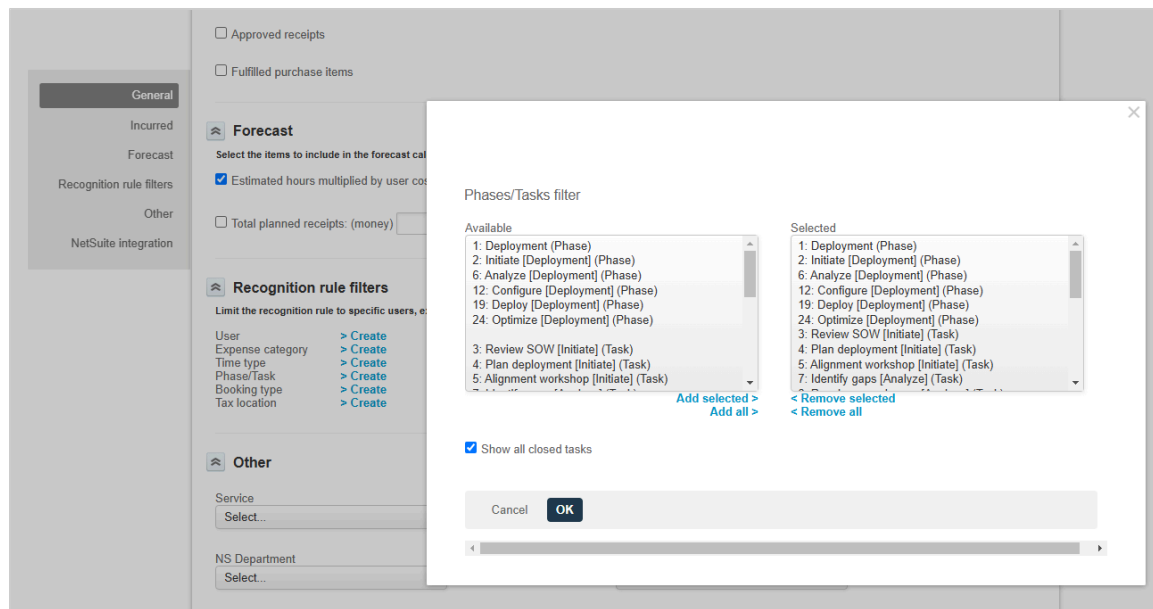
Portfolio Projects and Subordinate Projects

This feature lets you:

- Designate projects as portfolio projects — See Designating a Project as a Portfolio Project.
- Create multiple subprojects within a portfolio project — See Designating a Project as a Subordinate Project Within a Portfolio Project.
- Create billing rules that apply to the portfolio project and all subprojects within the portfolio project.

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- By default, all Time, Expense item and Purchase item billing rules created for the portfolio project apply automatically to all subprojects when billing runs for the portfolio project.
- When creating a billing rule for the portfolio project, you can use the Project filter to apply the billing rule to selected subprojects only.
- A note appears at the top of the billing rules list for subprojects if there are any applicable billing rules at the portfolio project level. The note includes a link to the portfolio billing rules list.
- The billing transactions list for the portfolio project shows the billing transactions generated against the portfolio project and all subprojects within the portfolio project. Add the Project column to the billing transactions list to identify against which project the transaction was generated.

> ⓘ **Note:** A separate optional feature lets you use customer POs to apply a single billing cap across all subprojects or across selected subprojects in a portfolio project. See Single Billing Cap Across Multiple Subprojects Within a Portfolio Project.

- Create recognition rules that apply to all subprojects within the portfolio project.
  - By default, all As billed, Expenses, Purchases, and Time recognition rules created for the portfolio project apply automatically to all subprojects when recognition runs for the portfolio project..
  - A note appears at the top of recognition rules list for subprojects if there are any applicable recognition rules at the portfolio project level. The note includes a link to the portfolio recognition rules list.
  - The recognition transactions list for the portfolio project shows the recognition transactions generated against the portfolio project and all subprojects within the portfolio project. Add the Project column to the recognition transactions list to identify against which project the transaction was generated.

To enable this feature, contact SuiteProjects Pro Support.

> ⚠ **Important:** After you designate a project as a portfolio project or subordinate project and transactions are recorded against this project, it is not possible to remove the portfolio or subordinate project designation. You should test this feature extensively on a sandbox account to make sure it meets your business requirements, before you enable the feature and start using it on your production account.

Designating a Project as a Portfolio Project

This feature lets you designate an existing or a new project as a portfolio project.

To designate a project as a portfolio project:

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1. Do one of the following:

   ▪ For an existing project, go to Projects > Projects > [*Select a project*] > Properties.

   ▪ For a new project, click the **Create** button and **Projects > New ...**, enter all the properties for the project.

2. Choose **Is portfolio project** under the Portfolio designations section of the project properties form.

3. Click **Save**.

> ⚠ **Important:** After you designate a project as a "portfolio" project and transactions are recorded against this project, it is not possible to remove the portfolio project designation.

Designating a Project as a Subordinate Project Within a Portfolio Project

After you designate a project as a portfolio project for a customer, you can designate multiple projects as subprojects within that portfolio project.

> ✔ **Tip:** Add the **Portfolio project** column using the list columns panel to identify subprojects and include a link to the portfolio project associated with each subproject in your project lists.

To designate a project as a subordinate project:

1. Do one of the following:

   ▪ For an existing project, go to Projects > Projects > [*Select a project*] > Properties.

   ▪ For a new project, click the **Create** button and **Projects > New ...**, enter all the properties for the project, and click **Save**. A new project must be saved first before you can designate it as a subproject.

2. Choose **Is a subordinate project of** under the Portfolio designations section of the project properties form and select the relevant portfolio project from the dropdown options.

3. Click **Save**.

> ⚠ **Important:** After you designate a project as a subordinate project and transactions are recorded against this project, it is not possible to remove the subordinate project designation.

Prevent Invoicing and Revenue Recognition on a Per-Project Basis

Often times, companies may create projects and have users begin work on a project before there is a signed contract. In addition to having users log time and expenses to the project, accurate billing and revenue forecasting is necessary for these types of projects. However, since these projects are considered to be at risk projects, invoicing, revenue recognition transaction, and revenue container creation should be prohibited for these projects.

SuiteProjects Pro enables you to designate specific projects that should prevent invoicing and revenue recognition creation. If a project has the option enabled on the project properties form, users will not

be able to create invoices, revenue recognition transactions or revenue containers for that project until that option has been disabled. However, billing rules, revenue recognition rules, charge and revenue projections, project billing transactions, and charges can be created for the project.

To enable this feature, contact SuiteProjects Pro Support.

Prioritize Recorded Time Over Booked Time for Charge and Revenue Recognition Projection

This features lets you use recorded or approved time entries exclusively for charge and revenue recognition projection on a given day when time entries exist for that day. The calculation ignores any time booked to any project or task for the same resource on that day.

After you enable this feature, go to Administration > Application Settings > Projects > Charge projections. The charge projections settings show two additional options.

- Approved and booked hours (ignore booked hours if worked or approved hours are logged)
- Worked and booked hours (ignore booked hours if worked or approved hours are logged)

With both options, SuiteProjects Pro uses booked time to calculate the charge and revenue recognition projection on a given day for a given resource, only if this resource has not recorded any time against any task or project on that same day. If a resource has recorded time entries for that day against any task or project, only the approved or recorded time will be used for charge and revenue recognition projection. If the resource is booked to any other projects or tasks on the same day but has not recorded time entries against these other tasks or projects, the booked time will be ignored.

To enable this feature, contact SuiteProjects Pro Support.

Project Assignment Profiles

The Project Assignment Profiles features lets project managers define the required skill sets for project and task assignments. These skill sets can be used to find and book the appropriate resources to the project or task.

To create a Project Assignment Profile, create a project plan, with associated tasks, then go to the Assignment profile tab on the project record, create a new assignment profile and add all skills required. You can then use the assignment profile to replace a generic resource with a qualified resource.

If the Automated Search Engine for Booking Creation optional feature is enabled for your account, you can also select the **Project assignment profile** appears on the following views:

- New multiple bookings form — Click the Create button then click **New, multiple** under Bookings to access the form.

- Booking worksheet (classic and dynamic) — Go to Resources > Bookings > Worksheet to access the worksheet.

To enable this feature, contact SuiteProjects Pro Support.

Project Budget

Stay on top of your project finances with the Project Budget optional feature. The feature lets you set a budget for labor, expenses, and purchases, and track expenditure either at the project or task level.

- You can compare up to five submitted budgets side-by-side and approve the most realistic scenario. View totals as well as monthly, quarterly, category-level, and task-level details.

- You can keep different versions of the same budget.

- You can can submit multiple budgets for approval. Approving a budget automatically rejects the others and lets the submitter know which was approved.

- You can define your own color codes ranges to identify whether budget items are on or off target, based on the percentage of planned versus actual expenditure.

For more information about configuring and using the Project Budget feature, see [PDF] Administrator Guide.

> ⚠️ **Important:** The previously existing Project Budget feature has been renamed "Transactional Budget". You can change the account term for "Transactional Budget" in Administration > Global settings > Display > Interface: Terminology.

To enable this feature, contact SuiteProjects Pro Support.

Project Center

The Project Center optional feature aims to provide you with the tools to manage key project activities from a single page.

The Project Center lets you:

- Create and modify your project plans — See the help topic Managing Project Plans in the Project Center.
- Create and manage resource bookings from within the project center — See the help topic Managing Resource Bookings in the Project Center.
- Track hours worked in past periods and view the planned resource costs and time charges — Viewing Hours, Time Costs, or Time Charges in the Project Center

Account administrators control who can access the project center by role permission.

Account administrators control project center options for all account users, including whether the project center show project sequence information only or project sequence information and resource booking information. See the help topic Project Center Options.

To access the project center for a specific project, go to Projects > Projects > [*Select a project*] > Project Center.

The project center view looks similar to a list and supports several list features including inline-editing. A label above the column headers indicates whether the project center view is editable or read-only, depending on the access control settings for the project you are viewing and your permissions. For more information about inline-editing, see the help topic Inline-Editing in Lists.

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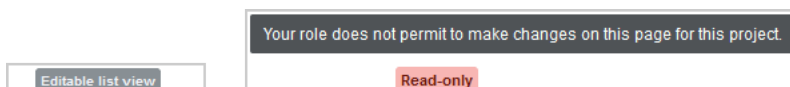
> **ⓘ Note:** Depending on your role, you may not be able to edit all information in the project center view even if the view itself is editable.
>
> Form permissions and form rules are applied. Form scripts associated with the booking form will be triggered when updating a booking record directly from the project center.

The project center includes the following components:

1	**Toolbar** — The project center toolbar includes the column selection and download tools available for lists throughout SuiteProjects Pro as well as functionality specific to the project center view. See the help topic Project Center Toolbar.
2	**Project outline** — The project outline occupies only the left section of the canvas and shows your project sequence and, depending on the project center options configured for your account, resources booked to your project. ■ You can create and modify your project plans. ■ You can add phases, tasks and milestones to your project and modify the project sequence. ■ You can view, enter or update information about the phases, tasks and milestones in your project using inline-editing. ■ You can set task and phase dependencies. ■ You can choose the columns shown in the project outline. The first time you visit the project center, the project outline includes the following columns: Actions, Task, Start, Finish, Hours — Booked. Only the Actions and Task columns are required, all others are optional. You can include columns corresponding to standard and custom fields for task records (phases, tasks and milestones) and booking records. You can save the layout in the same way as for lists. See the help topics Selecting List Columns and Personalized List Layouts. ■ Add resource bookings at the task level or at the project level. You can change the resources booked directly from the project center view. (Available only if project center options are set to show resource booking information) ■ View, enter, or update resource booking information using inline-editing. (Available only if project center options are set to show resource booking information) ■ Add built-in and custom fields for the booking entity as columns to the project outline. Relationship lines show a clear overview of the project structure and relationships between phases, tasks, bookings and milestones in the project. You can expand and collapse each node in the project tree to show or hide all phases, tasks, bookings, and milestones nested under that node. The project schedule information (calculated task, phase and project **Start** dates and **Finish** dates, and **Planned hours**) is updated automatically when you make a relevant change in the project center. When the calculation is in progress, information in the **Start**, **Finish** and **Planned hours** columns cannot be edited and loading spinners are visible in the column headers. See the help topic Project Schedule Calculation in the Project Center.
3	**Booking grid** — The Project Center view shows a booking grid alongside the project outline. Depending on the selected granularity, the booking grid shows a week-by week or month-by-month schedule. Each column corresponds to a week or month and the column header shows the first day of the week or month. See the help topic Date Navigation in the Project Center.The number of columns in the grid depends on the size of your browser window. It is calculated automatically when you first load the page or when you refresh it. ■ You can use the booking grid to enter the number of hours you want to book a resource for a given task (or at the project level) in a given week or month. You can copy multiple cell values using the copy and paste or fill handle functionality. ■ You can use the date navigation panel in the toolbar to change the period shown in the booking grid. ■ You can use the measure selector in the toolbar to switch between viewing hours, time costs or time charges in the booking grid. See the help topic Viewing Hours, Time Costs, or Time Charges in the Project Center. Horizontal bars in the booking grid give a visual representation of the duration of the project, each phase and task based on the **Start** and **Finish** dates. Each bar is located at the top of the row and is color-coded: green color for the project, dark gray color for each phase, light gray color for each task.

Availability indicators show the availability of the resource for each week as you make changes, and warning indicators show out of schedule bookings and potential overutilization of resources.

> **Important:** Review the following guidelines:
>
> - The booking grid is available only if project center options are set to show resource booking information – See the help topic Project Center Options.
> - By default, the calculated task, phase and project **Start** dates and **Finish** dates, **Planned hours** and **% Complete** are calculated based on assignments and not on bookings. To base the calculation on bookings instead of assignments for a project, see the help topic Basing Project Schedule Calculation on Bookings for a Project.
> - The project center does not currently support booking approvals — You cannot submit bookings for approval, approve or reject bookings using the project center.

> **Note:** The following list functionality is not available in the project center:
>
> - Filtering and sorting options — The project center page is designed to show the full project outline and all resource bookings in the project sequence.
> - Rows per page — You can collapse and expand nodes in the project trees to show or hide phase, task, booking and milestone rows nested under the node. This functionality would not be supported with a limited number of rows per page.
> - Column lock — The project center uses a fixed column lock to separate the project outline and the booking grid in the same view.
> - Bulk actions — Not currently supported.

To enable this feature, contact SuiteProjects Pro Support. The Project Center feature requires the Inline-Editing in Lists feature to be enabled.

> **Important:** Test the project center feature extensively on a sandbox account or during release preview before you enable it on your production account.
>
> - Note the following difference of behavior:
>   - If you add a booking in the project center, a separate booking record is created for each week you book the resource.
>   - If you create a booking using the entity properties form, you can create a single booking record for any length of time.

Project Status News Feed

Add, update, and display project status messages to keep project stakeholders informed.

When this feature is enabled:

- Project record headers and project QuickViews show a news feed icon 🔔. Click this icon to open the project status news feed, where you can add status updates to your project or read existing updates.
- You can add the **News feed — Status** column to your lists.
  - The **News feed — Status** column shows the project status as a color coded text badge, if there are any status updates for the project and if a project status is set in the latest status update.
  - Click the status to open the project status news feed from the projects list and view the latest status update details. You can sort and filter your data by status using the list sort and filtering options.

> **Note:** The **News feed — Status** column is currently only available on redesigned lists if the Project Status News Feed feature is enabled for your account.
>
> The project status is not currently supported in:
>
> - Project status summary
> - Reports
> - Dashboard portlets
> - Lists other than redesigned lists.

Each status update shows a date and time stamp and the name of the person who created it.

By default, the news feed displays 5 status updates when opened. Click **Load more** to load additional messages.
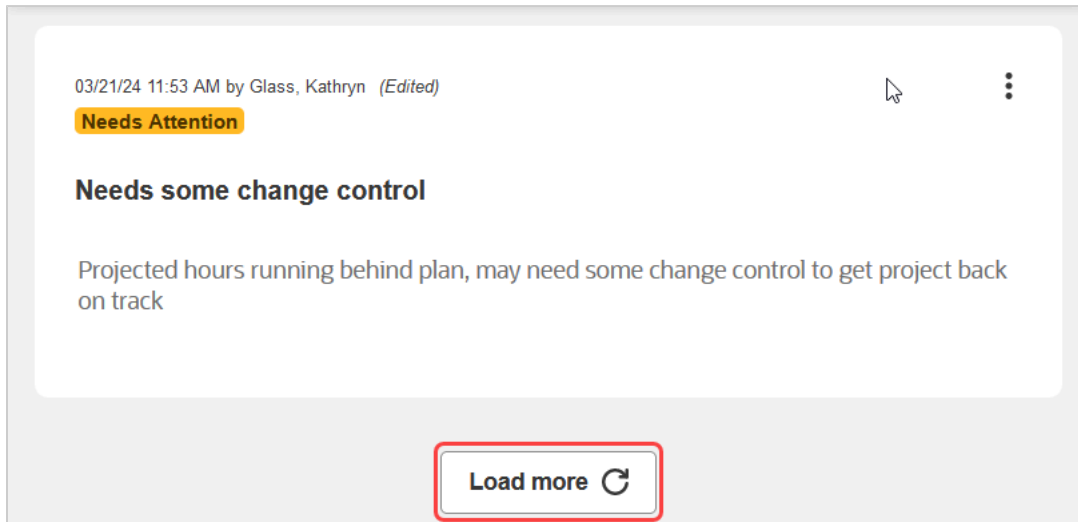
You can scroll through the news feed when there are more status updates than the page can fit.

Long status updates are not shown in full. Click **Read more** to see all the text.
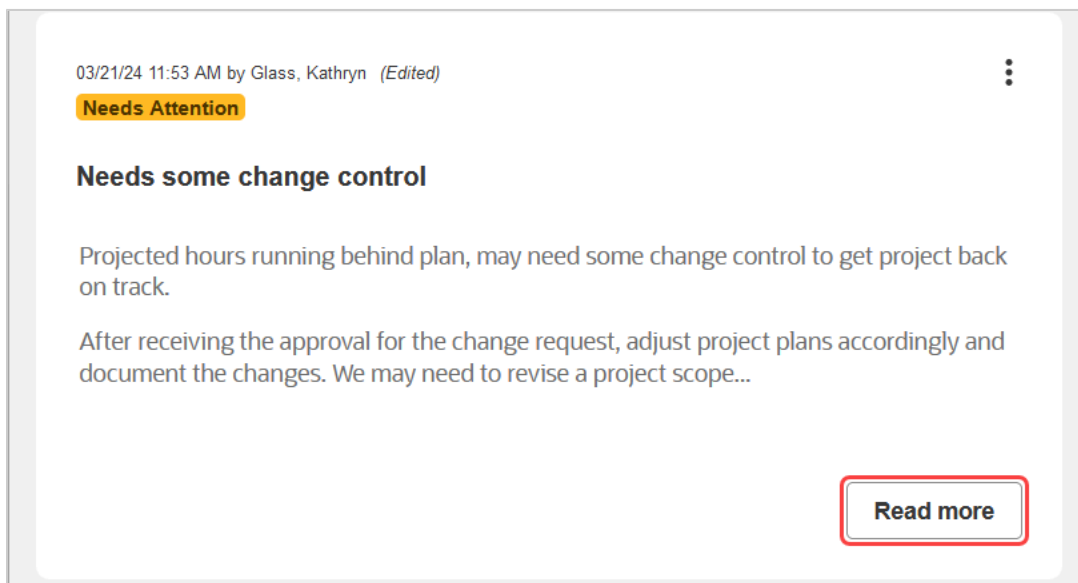
Status updates can be edited. Edited status updates show the mention *(Edited)* in the upper right corner. Point to *(Edited)* to see when and by whom the status update was edited.

To close the project status news feed, click anywhere outside of it.

Account administrators can control who can view or modify the project status news feed using the following role permissions:

- **View project news feed on any project** – Users with this role can see the project status news feed, but cannot edit it.
- **View and modify project status news feed on any project** – Users with this role can see the project status news feed and add, edit, or delete messages in it.

> ⓘ **Note:** Project owners can add, view, modify or delete news feed messages for the projects they own even if they do not have this permission.

To enable this feature, contact SuiteProjects Pro Support.

Restrict Project Recalculation to Tasks Impacted by the Changes on the Project Outline, Gantt and Task Detail View

Improve the performance of the project outline, Gantt and task detail view by restricting project recalculation to tasks that are impacted by the changes.

By default, when you create, duplicate, delete, or modify a task associated with the project you are viewing, or when you move or copy a task to another project, the project calculation includes all tasks associated with the project.

With this feature enabled, only the tasks that are impacted by the changes are include in the project calculation. For example, if you change the planned hours for a resource assigned to a particular task, the recalculation will include only the specific task and any successor tasks. None of the other tasks are included in the recalculation.

The optimization improves loading time for the following views after making changes or after running the project recalculation manually.

- Projects > [*Select a project*] > Phases/Tasks > List.
- Projects > [*Select a project*] > Phases/Tasks > Outline — Create, delete, duplicate, copy, move, repeat tasks.
- Projects > [*Select a project*] > Phases/Tasks > Gantt — Create, delete, duplicate, copy, move, repeat tasks.

This optional feature can be used in combination with other project recalculation optimization features. For more information, see 📄 Performance Tuning.

To enable this feature, contact SuiteProjects Pro Support.

Project Status Summaries (PSS)

Produce a project status page summarizing important project progress data. The Project Status Summary can be customized and populated with information critical to your company internally or your customers externally.

To enable this feature, contact SuiteProjects Pro Support.

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Each Project Status report can contain a header with basic information about the project. The default project header can be modified or deleted.

Below the header, you can add a series of portlets which show information about tasks, task assignments, bookings, and other project- and task-related information. The portlets can be moved, edited, and deleted in the PSS' "Edit" mode. The description of portlets can be edited, and individual portlets can be configured to be visible or hidden to customers.

Dynamic portlets such as the Bookings portlet also allow you to set primary, secondary, and tertiary sorting criteria or filters for the individual information cards which they display.

Project Status Summaries can be printed or converted to a PDF document.

To enable this feature, contact SuiteProjects Pro Support and ask them to enable the Project Status Summaries feature. After you enable this feature, you need to assign View or Edit permissions to your roles. The available role settings are:

- View Project status page
- View and modify Project status page

Select Different Currencies for Loaded Cost Overrides

You can accurately report on a project's profitability based on a user's loaded cost value in SuiteProjects Pro. Because a user's cost value may vary based on the project or task being worked on, loaded cost overrides can be established at the project or task level. Currently, when overriding the cost at the project or task level, the currency of the cost value is driven by the project's currency. At times, it may be beneficial for the currency of the user's cost value override to be different than the project's currency.

SuiteProjects Pro enables you to override the currency value for loaded cost overrides at the project and task levels. This permits more accurate profitability reporting based on the loaded cost currency on a per-project or per-task basis. The default setting for the currency value is set to "[Use Project Currency]" unless modified to a different selection. However, please note that if the project's currency changes, it does not dynamically update the currency value to the project's new currency.

To enable this feature, contact SuiteProjects Pro Support.
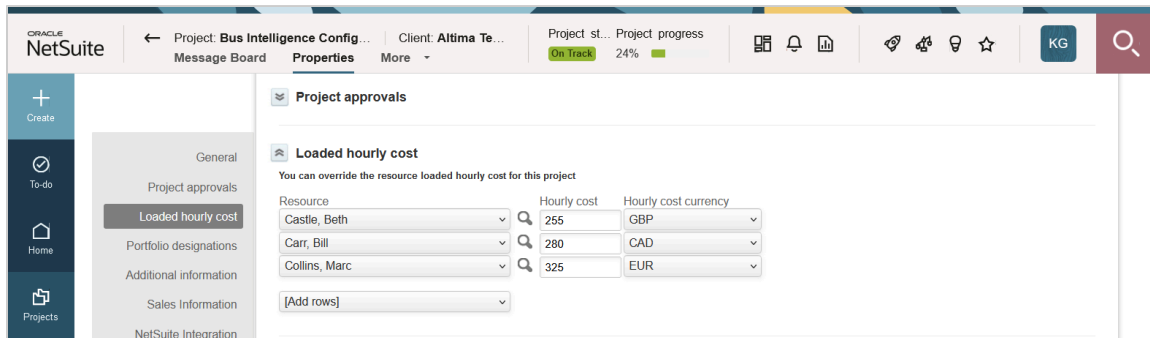
Show Billing Rules on Revenue Recognition Forms

Link billing rules to revenue recognition rules.

This feature allows you to choose which revenue recognition rule forms display a billing rule pick list. When you select a billing rule from this field, the billing rule is linked to the revenue recognition rule. This setting does not affect when billing or revenue recognition rules are run. Billing Rule IDs on revenue recognition rules can be accessed using the XML or SOAP APIs.

To enable this feature, contact SuiteProjects Pro Support.

Single Billing Cap Across Multiple Subprojects Within a Portfolio Project

This feature lets you use customer POs to apply a single billing cap across all subprojects or across selected subprojects in a portfolio project — You can use the customer PO total, specified either in hours or as a monetary amount, as the billing cap.

You can read or modify the `cap_by_customerpo` field in the `project_billing_rule` table using the XML API and SOAP API, and the `cap_by_customerpo` attribute is also listed in the Scripting Center SOAP Explorer.

The following conditions must be met to modify `cap_by_customerpo`:

- The project associated to the project billing rule is a portfolio project. .
- The project associated to the project billing rule is associated with at least one customer PO.
- The billing rule is associated with a customer PO.
- The billing rule type is one of the following: Expense item, Purchase item, Time.

To enable this feature, contact SuiteProjects Pro Support.

> ⚠ **Important:** This feature requires the Portfolio Projects and Subprojects feature to be enabled for your account. See also Portfolio Projects and Subordinate Projects.

Using a Customer PO as a Billing Rule Cap

You can use customer POs to apply a single billing cap across all subprojects, or across selected subprojects in a portfolio project. You can use the customer PO total, specified either in hours or as a monetary amount, as the billing cap.

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> **ⓘ Note:** Review the following guidelines:
>
> - A customer PO can only be used as a billing rule cap for one portfolio project at any time.
> - You can go to Projects > Projects > [*Select a project*] > Financials > Customer POs to view or modify Customer POs associated with the selected project .

To use a customer PO as a billing rule cap:

1. Go to Administration > Application Settings > Invoices > Customer POs to view the list of customer POs.
2. Do one of the following:
   - Select a customer PO.
   - Create a new customer PO — To do so, click the **Create** button, then **New > Customer PO**.
3. Enter the total **Amount (money)** (and **Currency**, if applicable) or the total **Amount (hours)** for the customer PO. It is not possible to enter values for both the **Amount (money)** and **Amount (hours)** fields.
4. Enter any additional details for the Customer PO and click **Save**
5. Go to Projects > Projects > [*Select a portfolio project*] > Properties.
6. Under the General section of the project properties form, next to Customer POs, click **Create** or **Edit** and make sure the relevant Customer PO is selected.
7. Go to Financials > Billing > Rules.
8. Do one of the following:
   - Select an existing Time, Expense item, or Purchase item billing rule.
   - Click the **Create** button and **Time billing rule**, **Expense item billing rule**, or **Purchase item billing rule**.
9. Under the Other section of the billing rule form, select a **Customer PO**.
10. Under the Rule cap section of the billing rule form:
    - Check the **Use customer PO cap** box. The **Cap (money)** or **Cap (hours)** will be populated automatically using the Customer PO **Amount (money)** or **Amount (hours)** value when you save the form.
    - (Optional) Check the **Adjust ... to fit under the cap** box.
    - (Optional) Check the **Do not bill ... that exceed the cap** box.
11. Click **Save**.

Task Worksheet

The task worksheet is an editable list of tasks. You can use the worksheet to view all your tasks in your projects, add tasks and modify some of the tasks properties.

Account administrators control the task information that can be viewed and modified in the task worksheet and other display settings. See the help topic Worksheet Display.

To enable this feature, contact SuiteProjects Pro Support.

Task on Purchase Requests

This feature lets you select a project task on purchase request or purchase item records. When enabled, the **Task** column can be added to purchase request and purchase item lists and detailed reports.

To enable this feature, contact SuiteProjects Pro Support.

User-Level Outline View

The User-Level Outline View feature enabled adds details about assignments in the Outline and Gantt view:

- A row is added for each resources assigned to the task under each task instead of a summary of resources assigned in the **Assigned to** column.

- Icons provide a visual indication of active and inactive resources, generic resources and assignment groups.

To enable this feature, contact SuiteProjects Pro Support.

To enable this feature, contact SuiteProjects Pro Support.

View Tasks for Inactive Projects in Task List

Managers often leverage the project task list to manage tasks. At times, there may be a need to view information for tasks that are associated with an inactive project. Without this feature, only tasks associated with active projects are displayed in the task list. When this feature is enabled, a new column is added to the task list to allow users to filter on tasks associated with an active or inactive project. To add the project status, users with the appropriate role privileges go to Projects > Tasks > Pending/Completed/All tasks and click on the **Customize list** link on the upper left corner of the top menu bar. Click **Project active** and select **Add selected items**. Click **OK**.

To enable this feature, contact SuiteProjects Pro Support.

Resources

The following optional Resources features are available in SuiteProjects Pro. Some features require SuiteProjects Pro Support to enable them for you.

- Additional Booking Specific Approvers
- Add Multiple Profiles
- Advanced Booking Worksheet
- Auto-Create Bookings for Generic Resources
- Booking Assignment Date Filters
- Bulk Booking Editor
- Bulk Delete Action Respects Booking Rules
- Consolidated Resource Profiles
- Customized User Avatars
- Decouple RDR Header and RRQ Booking Type
- Detailed Booking Groupings in the Advanced Booking Worksheet
- Disable New, Multiple Bookings Option
- Display More Bookings in Advanced Booking Worksheet
- Enable a Booking Type to Exist in All Approval Statuses
- Enable Bookings to be Auto-Approved
- Optional Booking on Approved Booking Requests
- "Require Job Code" Setting for Dynamic and Advanced Booking Worksheets
- Resource Booking Approvals
- Resource Demand Request
- Resource Demand Request Queues Cannot be Finalized If Availability is Zero
- Resource Planner
- Resource Profile Type Access Control
- Restrict Utilization Recalculation to Resources Impacted by the Changes on the Advanced Booking Worksheet
- Show Project Assignment Profiles on Task Assignments
- Skills Approvals
- Use Booking Request Grid to Enter Multiple Requests That Are Available
- View Advanced Resource Search Role Permission

Additional Booking Specific Approvers

This feature lets you specify up to three specific approvers for a booking and to bring extra flexibility to the booking approval process.

If you have RDR enabled this feature will also enable up to three specific approvers on a resource request.

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You can also then user the meta-entity value (for example [Booking approver 1]) in approval processes.

To enable this feature, contact SuiteProjects Pro Support.

Add Multiple Profiles

With this feature you can add multiple profiles to a resource profile at the same time. Type part of a profile name and a list of matching profiles displays, then select one or more profiles to add to the profile.

> ⚠ **Important:** The Add Multiple Profiles feature is no longer supported. Enable the Consolidated Resource Profiles, which offers similar functionality, instead. See Consolidated Resource Profiles.

Advanced Booking Worksheet

Use a more streamlined, detailed, and visually-appealing worksheet to create and manage your bookings.

A new and improved version of the Resource Booking Worksheet is now available to help you create and manage bookings more efficiently than ever. The new Worksheet has the following features:

- Bookings appear under each resource.
- See resource utilization at a glance. Green, yellow, and red color-coded cells highlight underutilized, fully utilized, and overutilized resources.
- Point to a resource's name to open a resource QuickView.
- Display and edit booking information in daily, weekly, monthly, or many other more time periods.
- Drill down to greater levels of detail.
- Filter the worksheet by department, job code, project, or skills.
- Column and row totals showing total number of hours or percentages across all visible resources and all visible time periods.

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- Resource utilization subtotals showing total number of hours or percentages for both the filtered set and all resource bookings when filters are applied.

The Advanced Booking Worksheet requires the Resource Planner feature, and also requires the following role permissions for roles which will use the worksheet:

- View and modify bookings
- View resource planner

To enable this feature, contact SuiteProjects Pro Support.

Auto-Create Bookings for Generic Resources

This feature lets you create a baseline of bookings for generic resources before resources have been committed to it. This feature will create bookings for each generic resource assigned to a project, using a button on the outline view. The feature can only be enabled if 'Enable approvals for bookings' is enabled.

Account administrators can control who can create bookings for generic resources from the outline view using the **Create bookings for generics from project plan** role permission. Users do not need to have the permission to view or create and modify bookings, or to access the Resources application to use this functionality if they have the **Create bookings for generics from project plan** role permission.

> ⓘ **Note:** You must have booking approvals enabled to use this feature.

To enable this feature, contact SuiteProjects Pro Support.

Booking Assignment Date Filters

When this feature is enabled, a new section is added to custom calculation filter forms which allows you to use booking assignment dates as filter criteria.

To enable this feature, contact SuiteProjects Pro Support.

Bulk Booking Editor

When this feature is enabled multiple bookings can be selected and bulk changes applied across any bookings that have not been rejected. The feature also enables bookings to be cloned with a link maintained to the original booking for reporting purposes.

The feature is accessed from the **Run an Action > View the selected bookings in the bulk editor** option.

To enable this feature, contact SuiteProjects Pro Support.

Bulk Delete Action Respects Booking Rules

This feature prevents a bulk action from bypassing a permission rule set to prevent a booking from being deleted based on certain criteria.

To enable this feature, contact SuiteProjects Pro Support.

Consolidated Resource Profiles

Get clear and complete details on each of your resources.

Use consolidated resource profiles to see what skills and experience your resources have at a glance. You can use it to update your resources' skills, which in turn helps you to assign the right resource to the right task and keeping them engaged, motivated, and increasing revenue.

The consolidated resource profile contains a header, which you can customize with information such as the resource's email address, manager, location, or any user custom field arranged in four columns. There is no limit to the number of fields which can be shown in the header. A table below the header lists the resource's skills and experience. Click each skill to see descriptions of each skill level.

For more information, see the help topic Consolidated Resource Profiles.

To enable this feature, contact SuiteProjects Pro Support.

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> **(i) Note:** Resources with the "View my own profile" role permission can see their information but cannot edit their demographics or custom fields. Resources with the "View and modify my own profile" role permission can also update their skills and experiences, but not the demographics. Users with either role will see a "My profile" link in the User Menu which opens the Consolidated Resource Profile.

> **(✕) Warning:** Users will not be able to see information hidden by a switch or role permission, (for example, "Cost" or "Rate"). These fields will instead display an empty field. Custom fields and their data are always visible. Do not add custom fields to the Resource Profile which should remain hidden from some users.

Customized User Avatars

Give your resource profiles personality with custom user avatars or profile pictures.

When this feature is enabled, you can upload avatars for users or give them the permission to replace the generic resource profile picture in their Resource Profile.

> **(i) Note:** To enable this feature, contact SuiteProjects Pro Support and request the Customized user avatars feature. The Consolidated resource profiles feature must also be enabled to show custom profile picture on the user interface. See Consolidated Resource Profiles.

> **(⚠) Important:** If this feature is disabled, all uploaded avatar images are deleted.

The avatars appear in:

- Resource profiles.
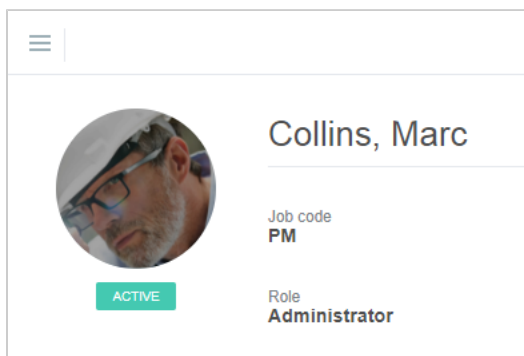
- The top bar.

> **(i) Note:** If you proxy in as (sign in and perform tasks on behalf of) another user, the top bar shows the initials of that user on a red color background, even if the user has a profile picture.

- Resource compare view

The following image formats are supported: BMP, GIF, PNG, and JPG. The image file size cannot be larger than 1 MB. Uploaded avatar images do not count against your account storage.

Two role permissions can be assigned to users:

- **Modify own profile picture** allows users to modify their own profile picture.
- **Modify all profile pictures** allows a user to modify all pictures for all users they have access to.

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> **Note:** You need to have the **Modify own profile picture** role permission to upload or change your own profile picture. You need to have the **Modify all profile pictures** to upload or modify profile picture for any resource you have access to.

To change a profile picture:

1. Go to Resources > Resources > [*Select a resource*] > Profile to open the consolidated resource profile for the resource whose profile picture you want to add or change. Go to User menu > My profile if you want to add or change your own profile picture.

2. Hover the mouse cursor over the profile picture and click the camera icon 📷 to add a profile picture, or the upload icon ⬆ to replace the existing profile picture. A file selection dialog appears.

   > **Note:** You may also use the delete icon 🗑 to delete the profile picture.
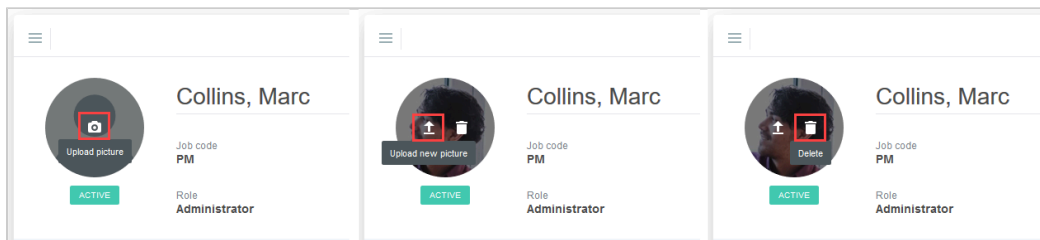
3. Select an image file and click **Open**. The image file cannot be larger than 1MB and must be one of the supported formats (BMP, GIF, JPG, or PNG). The Upload photo window displays with your selected image file.

4. Select the part of the image you want to use for the profile picture. A preview of the profile picture displays in the right pane. Use the mouse to position the image or click the icons under the picture to position the picture, rotate it, zoom in/out or select a new image file.

5. Click **Save & Upload**. The Consolidated Resource Profile displays with the new profile picture.

Decouple RDR Header and RRQ Booking Type

Without this feature enabled, the RDR header booking type and its RRQs are connected. Whenever either of these are changed it changes all booking types in the queue for that header and inversely.

This feature breaks the connection allowing RDR booking types and RRQ booking types to be changed independently.

To enable this feature, contact SuiteProjects Pro Support.

Detailed Booking Groupings in the Advanced Booking Worksheet

The Advanced Booking Worksheet rows uses both visible and hidden columns to group bookings under worksheet rows.

This optional feature includes the following functionality:

- All the bookings grouped under a single worksheet row have the same values for all fields except the note, start date and end date fields. Bookings grouped under the same worksheet row not only have the same values in the columns that are visible in the Advanced Booking Worksheet but also have the same value in the columns which are not shown.

> **ⓘ Note:** When the feature is not enabled, bookings grouped under the same worksheet row have the same values in the visible worksheet columns but may have different values in the hidden columns.

- The **Bookings** column shows an information icon ⓘ next to the number of bookings when both the following conditions apply:

  - Two or more worksheet rows show the same information in the visible columns.

  - Some of the booking information is unique to each worksheet row.

- To show the details for the bookings grouped under a single row, click the link showing the number of bookings in the **Bookings** column. A popup window shows detailed information for the bookings and the list of bookings sharing this information.

  If two or more worksheet rows share some information:

  - The shared information is displayed under the **Bookings information** heading.

  - The information that is unique to the bookings grouped under the worksheet row is displayed under the **Unique information** heading.

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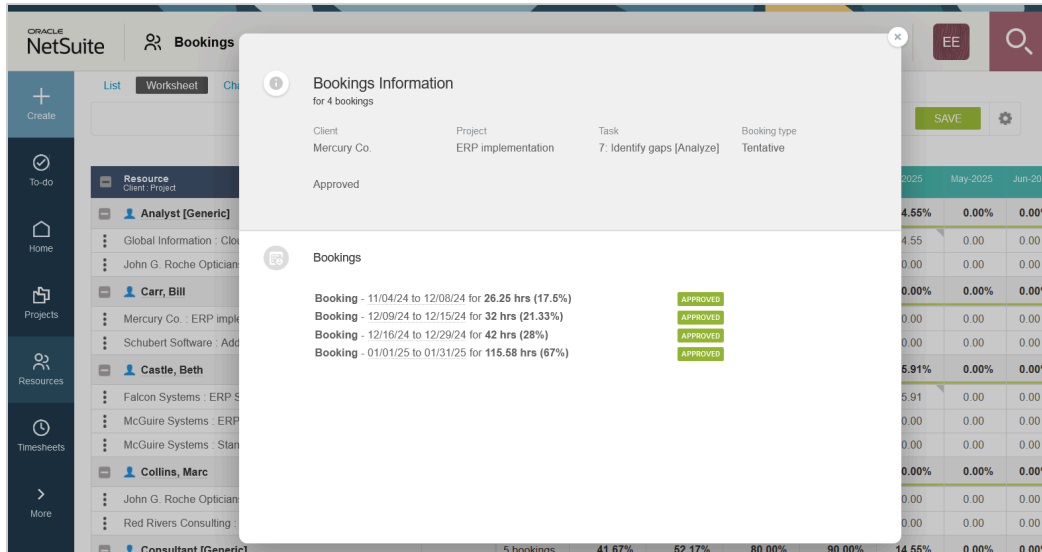
- The improved copy functionality copies all fields from the existing booking except the start date, end date, requester and note fields.

To enable this feature, contact SuiteProjects Pro Support.

Disable New, Multiple Bookings Option

This feature removes the Bookings "New, multiple..." option from the Create Button menu.

To enable this feature, contact SuiteProjects Pro Support.

Display More Bookings in Advanced Booking Worksheet

Load up to 2,000 bookings at a time.

By default, the Advanced Booking Worksheet loads up to 500 bookings when opened. With this feature, the number of bookings which are loaded can be changed to 1,000 bookings, 1,500 bookings, or 2,000 bookings.

> ⓘ **Note:** Increasing the number of bookings which are displayed in the Advanced Booking Worksheet may impact performance.

To load more bookings in the Advanced Booking Worksheet when opened, contact SuiteProjects Pro Support and ask them to set the desired number of bookings to display in the Advanced Booking Worksheet.

Enable a Booking Type to Exist in All Approval Statuses

This feature eliminates the association of a booking type to the approval stages for bookings. When moving from one approval status to the next, the booking type defaults are no longer required to be configured. Any booking type can be associated with any stage.

To enable this feature, contact SuiteProjects Pro Support.

Enable Bookings to be Auto-Approved

This feature permits the [Submitter] metavalue to be selected for user and project booking approvals. Bookings are then approved automatically after they are submitted.

To enable this feature, contact SuiteProjects Pro Support.

Optional Booking on Approved Booking Requests

Set whether approving a booking request automatically creates a booking or not. When approving booking requests, you can now check a box to approve a booking request but not create bookings.

To enable this feature, contact SuiteProjects Pro Support.

"Require Job Code" Setting for Dynamic and Advanced Booking Worksheets

Use this feature to require users to input a job code when creating bookings in the Dynamic or Advanced Booking Worksheets. When this feature is enabled, if a booking is created or modified, a message will appear for each booking row which does not have a job code assigned to it.

To enable this feature, contact SuiteProjects Pro Support.

Resource Booking Approvals

Allows bookings to flow through an approval process. Bookings will have Open, Submitted, Rejected and Approved statuses linked to Booking Types.

> **ⓘ Note:** The booking approval feature is mutually exclusive with the booking request feature. When booking approvals have been enabled, all existing bookings will be in the "Approved" stage.

To enable this feature, contact SuiteProjects Pro Support.

Resource Demand Request

The Resource Demand Request feature can be used to find and book resources. Define the skills required, search and select resources selection based on several indicators (for example, skills match, utilization %), then issue standard bookings for the selected resources.

The Resource Demand Request feature handles booking in a robust way, providing a more transparent overview of the booking progress at each step of its lifetime.

If the Enable a Booking Type to Exist in All Approval Statuses optional feature is also enabled, users with the "Allow change of booking type on finalized resource request" role permission can edit the booking

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type field on a resource demand request even after the request is finalized and submitted to a resource manager. See Enable a Booking Type to Exist in All Approval Statuses.

To enable this feature, contact SuiteProjects Pro Support.

Resource Demand Request Queues Cannot be Finalized If Availability is Zero

With this feature, Resource Demand Request Queues can no longer be finalized if the availability hours or percentage is set to 0.

To enable this feature, contact SuiteProjects Pro Support.

Resource Planner

The resource booking planner provides a global view on bookings by calendar and resource utilization calculated per day, week or month. It is the perfect tool to spot under or over utilization and to quickly resolve it.

Simply drag and drop to quickly reassign a booking from one resource to another. Drag a box over the required date period next to an existing booking and a new booking will be created, with values sourced from the original booking and the selected date range. Open the Edit Booking form by clicking the **Edit this booking** icon 🖉 or use the **More options** icon ••• to create, edit, duplicate or delete bookings directly from the resource planner. Overbooked resources are highlighted in the customer view. When a booking is changed the utilization bar is changed to "Unknown". The new utilization is calculated when the booking is saved. All bookings for one resource can be rolled up to one line to use less space if there are no overlapping bookings. Two new options are made available on the booking planner settings to give the visibility of resources which are inactive or with no bookings for the specified period.

> ⓘ **Note:** If the Resource Booking Approvals feature is enabled for your account, depending on your company's SuiteProjects Pro account configuration, bookings with the approval status "Submitted" or "Approved" cannot be modified. You cannot drag to change the start date, end date, duration or resource booked from the Resource Booking Planner view.

In the redesigned resource booking planner, the **Refresh** button and the **Legend** have been relocated to the toolbar. This increases the screen real estate for data on the resource booking planner grid and chart.

With this feature enabled, overbooked resources are highlighted in the customer view. Click the arrow on the left to get to the resource view and analyze why the overutilization has occurred.

To enable this feature, contact SuiteProjects Pro Support.
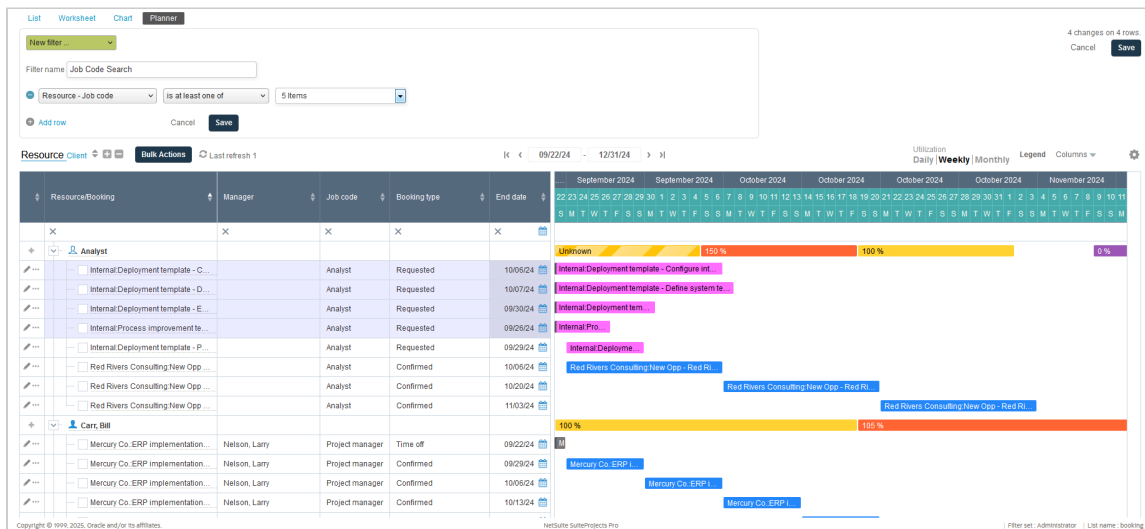
Resource Profile Type Access Control

This feature lets you control access to resource profile types by role. When this feature is enable you can:

- Check the **Restricted** box for a resource profile in Administration > Application Settings > Resources > Resource profiles to restrict access to these resource profiles.

  Users must have specific role permissions to view, to select or to modify restricted resource profile types anywhere in SuiteProjects Pro.

- Assign the following role permissions to specific roles:

  - **View restricted profiles** — Users with this role permission can see and select restricted resource profile types, but cannot edit them.

  - **View and modify restricted profiles** — Users with this role permission can see, select and edit restricted resource profile types.

To enable this feature, contact SuiteProjects Pro Support.

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Restrict Utilization Recalculation to Resources Impacted by the Changes on the Advanced Booking Worksheet

Improve the performance of the advanced booking worksheet by restricting utilization recalculation to resources that are impacted by the changes.

By default, when you add, modify, or delete bookings using the advanced booking worksheet, the utilization is recalculated for all shown resources.

With this feature enabled, the utilization is recalculated only for the resources that are impacted by these changes. When you save the advanced booking worksheet, a label appears next to each impacted resource:

- A **Pending calculation** badge indicates that the calculation is in progress. The worksheet may not show the latest booking and utilization information for this resource. Wait for the calculation to complete then reload the page.

- A **Ready** badge indicates that the calculation is completed. To view the latest booking and utilization information for this resource, reload the page.

- A **Changed** badge indicates that changes have been made by another user impacting the information you are viewing. To view the latest booking and utilization information for this resource, reload the page.

To enable this feature, contact SuiteProjects Pro Support.

Show Project Assignment Profiles on Task Assignments

This feature ensures that assignment profile values on a task's assignments always remain visible in the user interface and related reports.

Visibility includes on the Task Assignment section of the Create/Edit task form, project outline view, and as a task detail field on reports.

To enable this feature, contact SuiteProjects Pro Support.

Skills Approvals

Get control over your resources' skills. With this feature, you can delegate the responsibility of keeping your resources' profiles up-to-date. SuiteProjects Pro notifies you when your resources update their skills in the Resource Profile. With your approval, the skills are updated.

Resources with either of the following role permissions can edit their own skills and experience in their profile:

- View and modify own resource profile
- View and modify profiles

When one of your resources makes a change to their resource profile and clicks Save & Submit, the change is marked with a "Pending" badge in their profile.

You will also receive a notification that your resource has made a change to their resource profile. You can set these notifications in Administration > Application Settings > Resources > Notifications. After you set them up, email notifications will be sent as with other types of approvals when changes are submitted. Reminders will also appear on the Dashboard.

To enable this feature, contact SuiteProjects Pro Support.

Use Booking Request Grid to Enter Multiple Requests That Are Available

Similar to the resource booking grid, a booking request grid has been added to Resources to help save time and offer increased flexibility. Using the grid, create multiple booking requests that vary in booking amounts and save and submit them from the grid. A resource can be booked for different hour or percentage amounts during a project. Custom fields can also be added to the grid to tailor the information captured to unique company needs.

To enable this feature, contact SuiteProjects Pro Support.

View Advanced Resource Search Role Permission

Control who can access the Advanced Resource Search feature using the **View Advanced Resource Search** role permission.

This optional feature adds a role permission to let you control who can access the Advanced Resource Search feature, otherwise available to all users by default.

To enable this feature, contact SuiteProjects Pro Support.

Invoices

The following optional Invoices features are available in SuiteProjects Pro. Some features require SuiteProjects Pro Support to enable them for you.

- Additional Option for Invoice Layout Terminology Overrides
- Advanced Agreement and Customer PO Balance Calculation
- Allow an Approver to Edit a Submitted Invoice
- Credit and Rebill Functionality for Invoices
- Custom Fields for Projects as Columns on Charges Lists
- Display a Zero Sum Tax Rate and Amount on Invoices
- Enhanced Workflow Process Invoice Submission and Revenue Container Creation
- Forex Precision Control for Invoices
- Generate Charges for Partial Periods
- Negative Charge Stages
- Negative Charge Stages by Quantity
- Prevent Invoicing and Revenue Recognition Per Customer PO and Agreement
- Pro-Rate Selected Charges
- Save Invoices Short URL
- Save Payment Terms Internal ID on Invoice Records
- Subtotal and Sort Expense Item Groups on Invoices

Additional Option for Invoice Layout Terminology Overrides

If you use SuiteProjects Pro to send invoices to customers , different invoice layouts can be configured to modify the appearance of an invoice based on customer needs. Invoice layouts can be assigned at the customer, project or invoice level. In addition to being able to sort or group items, the terminology for certain fields can be overridden and applied to that specific invoice layout. It is also possible to override the terminology for "Agreement" and "Customer PO". This feature adds overriding the terminology for "Customer PO Number".

To enable this feature, contact SuiteProjects Pro Support.

Advanced Agreement and Customer PO Balance Calculation

The agreement and customer PO functionality permits companies to track what's been billed against an agreed upon amount with their customer. For example, if a customer agrees to a $10,000 contract for a project, an agreement or customer PO can be created for the $10,000. As work is being performed and charges are generated by billing, the contract amount can then be drawn down based on charge

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amounts. As the project progresses, it is beneficial to see the remaining balance on the contract to ensure that the project is still on track.

Advanced balance calculations are available for agreements and customer POs. With this advanced calculation, users have the ability to configure charge stages indicating when charges should be deducted from the agreement or customer PO balance. Within a charge stage, users can choose to have the balance deducted for all charges, charges placed on an invoice, charges not on an invoice, or no charges. The agreement or customer PO balance will deduct the charge amount from the balance based on the rule selection on the charge stage. For example, if the rule for the "Write-Off" charge stage is set such that no charges placed in that charge stage should be deducted, any charge placed in that charge stage will never be deducted from the balance.

To enable this feature, contact SuiteProjects Pro Support.

Allow an Approver to Edit a Submitted Invoice

Companies often require their users to submit invoices for approval by the finance department or management. To ensure the billing process is not delayed, it is beneficial for the approver to be able to make modifications to the invoice or associated charges. Previously, to make changes to the invoice, it needed to be rejected.

When this feature is enabled, to edit a submitted invoices, approvers go to Invoices > Invoices > Submitted and select an invoice. To edit the invoice header information, click on the "Edit" or "Properties" link. Edit the form and click Save. To edit the associated charges, click on the "Change charges" or "Charges" link. Edit or remove individual charges.

To enable this feature, contact SuiteProjects Pro Support.

Credit and Rebill Functionality for Invoices

The invoicing functionality lets you group multiple charges that should be billed and sent to a customer. Invoices can be sent through an approval process, sent to a customer and subsequently exported to an external accounting system. At times it is necessary to credit and potentially rebill an invoice that has already been approved, sent to a customer, or has been exported. By default, if an invoice and corresponding charges have been approved or exported, a credit would need to be applied manually creating negative offsetting charges. New charges would also need to be created manually if the invoice needed to be rebilled.

The Credit and Rebill feature streamlines the process of crediting an invoice and rebilling associated charges after a credit has been issued. After you enable this feature, Go to the Credit/Rebill tab on the invoice record to credit, or credit and rebill an invoice. If you credit an invoice, a new invoice will be created that contains offsetting charges of the original invoice. If you then rebill the invoice, the charges from the original invoice will be available to be placed on a new invoice. Both credit and rebill invoices will go through the same approval process as the original invoice. Additionally, the History link in the original invoice will indicate whether the invoice has been credited or rebilled, with the corresponding invoice numbers.

You can enter the invoice date when you create the credit invoice. Account administrators can set the **Invoice credit date** as either the date from the original invoice or today's date (default). This date is visible on credit invoices, and can be edited until the credit invoice is approved. To set the Credit Invoice Date, go to Administration > Application Settings > Invoices > Other settings.

To enable this feature, contact SuiteProjects Pro Support.
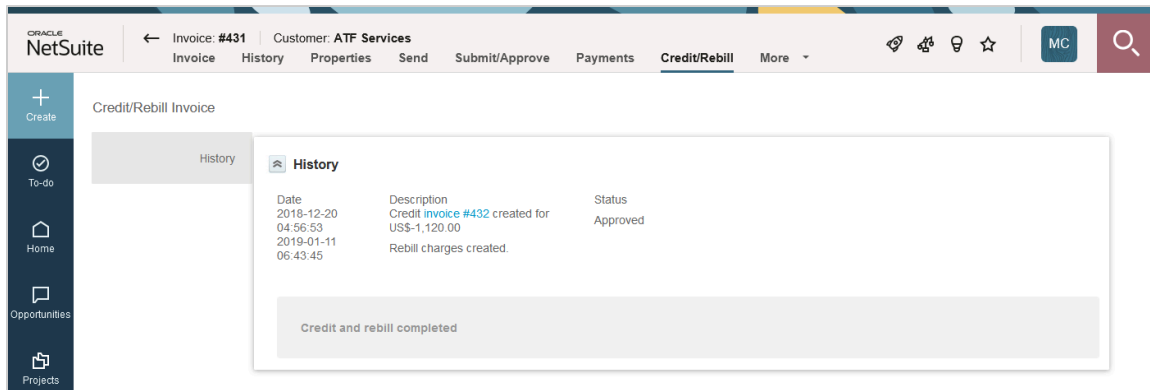
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Custom Fields for Projects as Columns on Charges Lists

Add columns for custom fields associated with project records to charges lists.

To enable this feature, contact SuiteProjects Pro Support.

Display a Zero Sum Tax Rate and Amount on Invoices

If you use SuiteProjects Pro to send invoices, multiple invoice layouts can be configured to enhance the appearance of the invoice. For various reasons, it may be necessary to display the total tax amount, even if the tax amount is zero.

When this feature is enabled, you can enter a zero percentage for the tax rate on the tax location properties form. When the tax rate value is blank or 0, it will be saved as 0%.

To enable this feature, contact SuiteProjects Pro Support.

Enhanced Workflow Process Invoice Submission and Revenue Container Creation

This feature enhances the workflow process for invoice submission and revenue container creation. When billing has been run and an invoice has been created, a new link is available on the invoice page to submit the invoice, run revenue recognition on the project, and create a revenue container in one click. When all actions have been performed, you are redirected to the Balance Summary page of the new revenue container. SuiteProjects Pro performs appropriate checks to ensure that the project meets all the criteria for a new revenue container.

When this feature is enabled, go to the invoice and click **Generate revenue container**. If a confirmation message appears, click **Continue**. Check the **Do not show this confirmation request again** box if you do not want to do this additional confirmation step in the future.

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> **ⓘ Note:** If there is an existing revenue container that has not yet been approved, an error message appears indicating that an open or submitted revenue container still exists and therefore SuiteProjects Pro cannot automatically submit the invoice and create the revenue container. A link in the error message points to the existing revenue container that needs to be approved.

To enable this feature, contact SuiteProjects Pro Support.

Forex Precision Control for Invoices

For invoices and revenue recognition transactions, the following currencies now have fixed decimal places matching the number of decimal places for these currencies in NetSuite.

To enable this feature, contact SuiteProjects Pro Support.

Currency code	Description	Precision
AMD	Armenian dram	0
AOA	Kwanza	1
BHD	Bahraini dinar	3
BYR	Belarusian ruble	0
CLF	Unidad de Fomento (funds code)	0
CLP	Chilean peso	0
COP	Colombian peso	0
GNF	Guinea franc	0
HUF	Hungarian forint	0
IDR	Rupiah	0
IQD	Iraqi dinar	0
IQD	Iraqi Dinar	3
IRR	Iranian rial	0
ISK	Iceland krona	0
JOD	Jordanian dinar	3
JPY	Japanese yen	0
KHR	Riel	0
KRW	South Korean won	0
KWD	Kuwaiti dinar	3
LAK	Kip	0
LBP	Lebanese pound	0
LYD	Libyan dinar	3

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Currency code	Description	Precision
MMK	Kyat	0
MOP	Pataca	1
OMR	Rial Omani	3
PYG	Guarani	0
RWF	Rwandan franc	0
TND	Tunisian dinar	3
TWD	New Taiwan dollar	1
UGX	Uganda shilling	0
VND	Vietnamese Dong	0
VUV	Vatu	0
XAF	CFA franc BEAC	0
XOF	CFA Franc BCEAO	0
XPF	CFP franc	0
YER	Yemeni rial	0

Generate Charges for Partial Periods

This feature permits a user to generate charges for incomplete periods. For example, a user wants to charge a customer $1000 a month on the 1st of each month. But a one month contract was signed on the 15th which means that the customer needs to be charged $500 for the current month and $500 for the next month.

This feature is used to create fractional charges for incomplete periods.

This feature works for:

- Project > Financials > Billing Rules (fixed fee on date or milestone)
- Project > Financials > Revenue Recognition Rules (fixed amount on date or milestone rule)

⚠ **Important:** This feature is not designed to work with the repeat for X number of instances option.

To enable this feature, contact SuiteProjects Pro Support.

Negative Charge Stages

When this feature is enabled, you can differentiate between regular and negative charge stages. All charges in a negative charge stage have their monetary amount (price) multiplied by –1.

To change a regular charge stage to a negative charge stage, go to Administration > Application Settings > Invoices > Charge stages > [*Select a charge stage*] and check the **All charges within this stage to be multiplied by –1** box. Clear the box to change a negative charge stage to a regular charge stage.

Moving a charge from a regular stage to a negative stage (and inversely) changes the charge monetary amount. It is multiplied by –1. The charge amount is not changed when moved between two stages of the same type. Negative charge stages cannot be selected on billing rules.

To enable this feature, contact SuiteProjects Pro Support.

Negative Charge Stages by Quantity

When this feature is enabled, charges in a negative charge stage have the quantity multiplied by –1, instead of the monetary amount (price or rate).

See also Negative Charge Stages.

To enable this feature, contact SuiteProjects Pro Support.

Prevent Invoicing and Revenue Recognition Per Customer PO and Agreement

Often, companies plan Customer POs and Agreements and have users begin work before they are signed. In addition to having users log time and expenses, accurate billing and revenue forecasting is necessary for these cases. However, since these are considered to be part of projects at risk, invoicing, revenue recognition transaction, and revenue container creation should be disallowed.

When this feature is enabled, you can configure SuiteProjects Pro to prevent the creation of invoice and revenue recognition transactions against specific Customer POs and Agreements.

To do so, go to Administration > Application Settings > Invoices > Agreements > [*Select an agreement*] or Administration > Application Settings > Invoices > Customer POs > [*Select a customer PO*]and check the **Prevent invoice revenue creation agreement** box.

If the box is checked, users will not be able to use the associated charges in invoices, revenue recognition transactions or revenue containers for that Customer PO or Agreement. Billing rules, revenue recognition rules, charge and revenue projections, project billing transactions, and charges can still be created for the project.

When it is safe to create invoices and revenue recognition transactions against the agreement or customer PO, clear the **Prevent invoice revenue creation agreement** box.

To enable this feature, contact SuiteProjects Pro Support.

Pro-Rate Selected Charges

This feature lets you select one or more charges and pro-rate the charges total when creating an invoice.

The selected charges will be pro-rated and new charges will be created for the remaining amounts. You can select the charge stage that should be assigned to these newly created remainder charges.

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When enabled the bottom panel of the charge selection pages

To do so:

1. In the Create menu, click **New invoice**.

   The charge selection page appears.

2. Select the customer and project you want to create an invoice for.

   The page shows all charges for the project that are available for invoicing.

3. Select the charges you want to pro-rate. To do so, check or clear the box next to each charge to add or remove it from your selection.

   The bottom panel shows the number of charges selected and the total amount for all selected charges.

4. Click **Run**.

   The pro-rate selected charges total popup window appears.

5. Enter a value in any one of the following three fields. The other two are calculated automatically.

   - **Retain %** – The percentage of the amount to be retained in each charge.
   - **Retain total** – The monetary total amount to be retained across all selected charges.
   - **Move remaining** – The remainder amount across all selected charges.

   For example, if the Total selected is $1,600.00 and you enter 80% in the **Retain %** box, the **Retain total** changes automatically to 1,280 and **Move remaining** to 320.

6. Pro-rating existing charges creates new charges for the remaining amount. Select the charge stage for these new remainder charges (the charge stage remainder charges should be moved to) in the **To** box.

7. Click **Pro-rate**.

   The charge selection page shows the pro-rated charges and, depending on the charge stage you selected for them, the remainder charges.

8. Select the charges you want to include in your invoice and click **Save** to create the invoice.

To enable this feature, contact SuiteProjects Pro Support.

Save Invoices Short URL

This optional feature adds the custom field **Online Invoice** [openair_invoice_short_url] to the Invoice entity. The custom field is used to store the invoice URL that SuiteProjects Pro generates automatically when an invoice is created. It is read-only and appears on the invoice properties form as a hyperlink.

Administrators can control who can view the **Online Invoice** link on the invoice properties form using form permissions.

> ✔ **Tip:** All users will be able to see the **Online Invoice** link by default. Make sure you set the relevant form permissions after you enable this feature if access needs to be restricted.

The **Online Invoice** custom field supports read requests using the XML API, SOAP API and User Scripting.

> ⓘ **Note:** The invoice URL is the short URL included in the body of the invoice email when you go to the Send tab for a given invoice record in SuiteProjects Pro.

To enable this feature, contact SuiteProjects Pro Support.

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Save Payment Terms Internal ID on Invoice Records

Depending on your account configuration, you can select the payment terms on the invoice entity property form using a dropdown list. By default, the payment terms name is saved on the invoice record but not the payment terms ID.

This optional feature sets the internal ID of the payment terms selected for the invoice automatically when you create a new invoice or update an existing record. If your account is configured to show internal IDs on lists or on reports and if you are an account administrator or have the relevant role permissions, you can add the `Internal ID - payment_terms_id` column on lists or the `Internal ID - payment_terms_id` attribute to Invoice detail reports.

With this feature enabled, the `payment_termsid` value can be retrieved and modified using the XML or SOAP API.

To enable this feature , contact SuiteProjects Pro Support.

> **ⓘ Note:** If the **payment terms** field currently shows as a text field on the invoice property form, it will show as a dropdown list after you enable this feature. The payment terms internal ID will not be populated for existing invoice records when you enable this feature. To set the payment terms internal ID for existing records, you can either save existing invoices manually or use the XML or SOAP API.

Subtotal and Sort Expense Item Groups on Invoices

These features allow you to change the sorting and subtotal appearance in invoices.

- **Sort all expense items alphabetically** — when selected, all expense items are sorted alphabetically. If cleared, the order in which these expenses groups were created is preserved.
- **Display subtotals for custom expense item groups when using alternate invoice layout for expense charges** — Select this option to display subtotals for custom expense item groups on invoices.

> **ⓘ Note:** These features are only supported when the invoice layout uses custom groupings and an alternate layout for expenses.

To change these settings, go to Administration > Application Settings > Invoices > Invoice layouts > [select a layout] and go to the "Combine charges" section of the form.

To enable this feature, contact SuiteProjects Pro Support.

> **ⓘ Note:** This feature also requires invoice layouts to allow users to define aggregate expense items. To enable this feature, contact SuiteProjects Pro Support and request the **Enable Custom Groupings of Expense Item Charges on an Invoice** account setting.

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Reports

The following optional Reports features are available in SuiteProjects Pro. Some features require SuiteProjects Pro Support to enable them for you.

- Audit Trail Values Available in Summary Reports
- CSV Pivot Tables Can Respect User Regional Settings
- Custom Fields Available as Filters in Selected Reports
- Email Scheduled Reports to a Contact from the Contacts List
- Enable Booking Approval Status in Reports
- Exclude Specific Values from Filters in Reports
- Hide Personal User Data and Hours Remaining in the Timesheet Report
- Organize Saved Reports in Specified Folder
- Project Hierarchy Settings in User Detail Report
- Project Crosstab Date Filters
- Report Manager and Editor
- Report on More than 31 Days When Reporting on Daily Time Periods
- Report Throttling
- Stricter Permission Control for Extended Fields Derived from Employee Cost Information
- Web Services Log Details Report

Audit Trail Values Available in Summary Reports

This feature enables you to include information from the audit trail stored in SuiteProjects Pro in summary reports.

When enabled, you can select the fields for which you want to retrieve values from the audit trail information when setting up your summary report.

These audit trail value reporting fields corresponding to the field <field label> for record type <record type> are listed as `Audit - <record type> - <field label>`, where `<field label>` is the field for which you want to retrieve historical value from the audit trail information, and `<record type>` is the type of record the field is for.

When you run the summary report for a specific period, the report includes the value of the fields at that specific point in time and shows the name of the user who changed the value.

To enable this feature, contact SuiteProjects Pro Support.

CSV Pivot Tables Can Respect User Regional Settings

When this feature is enabled, generated pivot table CSV files respect user regional settings for comma and thousand separators.

A pivot table CSV file is generated and available for download after you run the report if the **Generate Pivot Table file** box is checked in the report properties form under the Other section.

To enable this feature, contact SuiteProjects Pro Support.

Custom Fields Available as Filters in Selected Reports

This feature makes user and project custom fields available as filters in selected detail reports:

- Project and user custom fields are available in Time entry and Receipt detail reports.
- Project custom fields are available in Charge and Revenue transaction detail reports.

To enable this feature, contact SuiteProjects Pro Support.

Email Scheduled Reports to a Contact from the Contacts List

With this feature, users have the option to send scheduled reports to additional email addresses on the Contacts list. Enter contact information including the email address in the Contacts form and send reports to that email address.

When the report runs, the results will be sent to the contact's email address.

To enable this feature, contact SuiteProjects Pro Support.
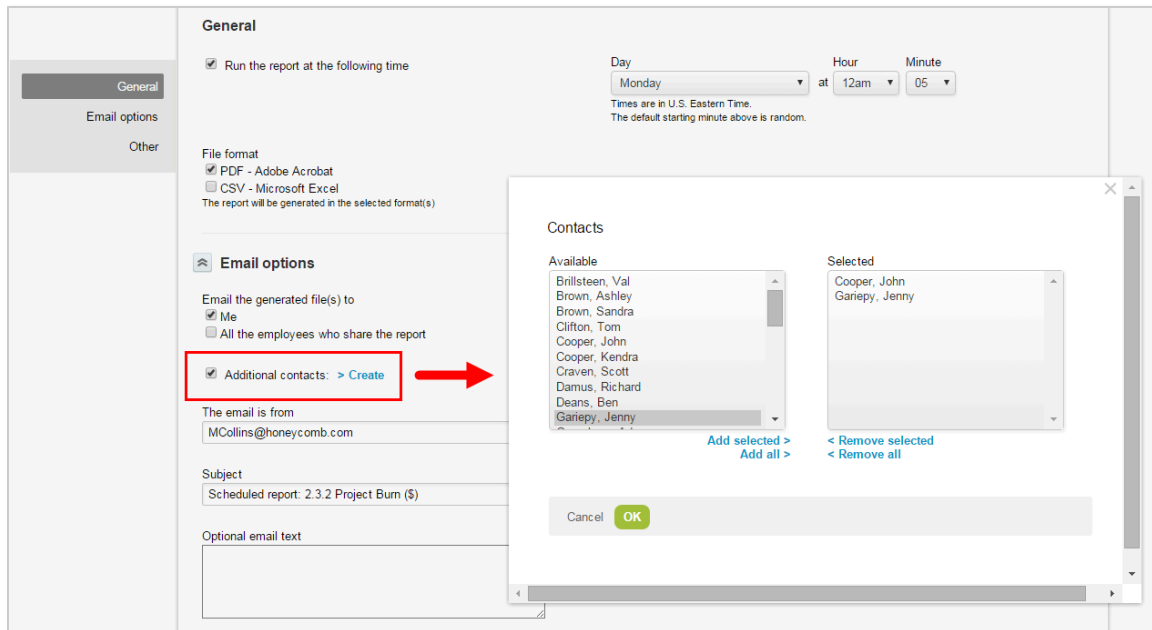
Enable Booking Approval Status in Reports

This feature enables a booking approval status column and filter in both summary and detail reports.

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> **(i) Note:** To be able to use booking approval status in the slip/revenue projection reports, the projections need to be re-run. Projections will be re-run over the weekend after the release.

To enable this feature, contact SuiteProjects Pro Support.

Exclude Specific Values from Filters in Reports

SuiteProjects Pro reporting permits great flexibility in providing key information to users and managers. In addition to selecting a multitude of reporting values, users can configure filters within a report to limit the items that need to be included in the report. For example, if running a utilization report, managers may choose to only report on the utilization value for full-time employees. To do this, users would click on the Resource filter on the report edit form and include the individual users that should be displayed in the report results. For some companies, there may be a larger number of full-time employees than part-time employees and therefore managers may want to exclude the part-time employees from the report rather than include all full-time employees.

Furthermore, new full-time employees may continue to be hired. This feature adds the ability for users to select an option to exclude values from specific filters in a report. In the aforementioned example, a user may want to exclude part-time employees. Thus, all existing and newly hired full-time employees will automatically be included in the report results.

To enable this feature, contact SuiteProjects Pro Support.

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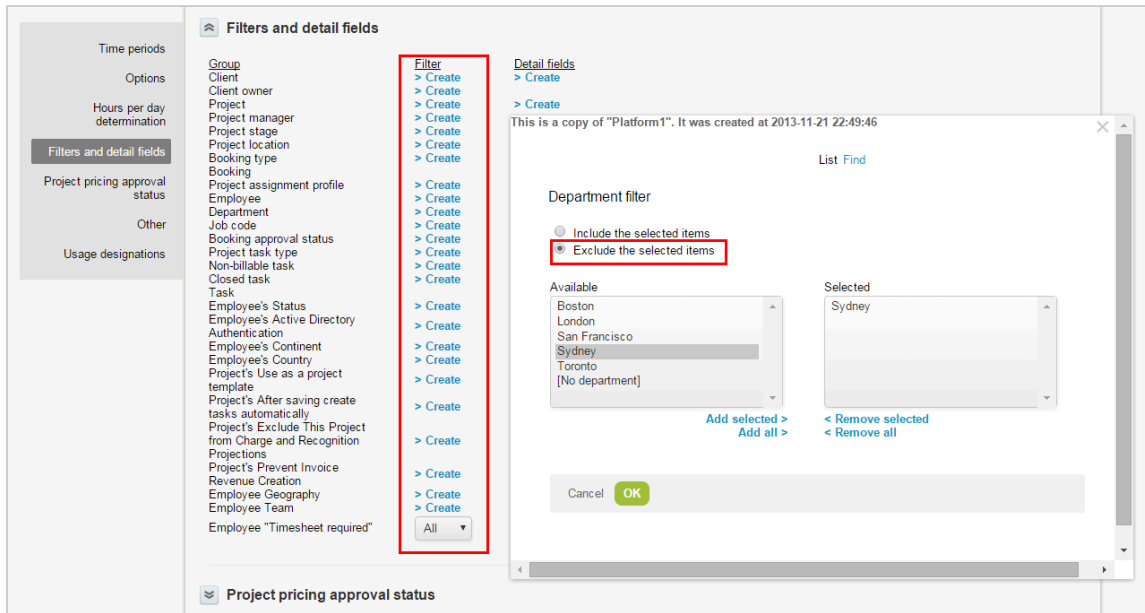
Hide Personal User Data and Hours Remaining in the Timesheet Report

Keep personal user data safe with a new feature which hides this data in the timesheet report.

This feature hides personal data from timesheet reports, but not from other reports where you may need that information.

To hide personal user data in Timesheet reports:

1. Go to Administration > Application Settings > Timesheets > Timesheet report layout.
2. Select "Hide personal user information on timesheet reports".

> **ⓘ Note:** The "Hide personal user information on timesheet reports" option will not appear in the Timesheet report layout form if your company has the "Hide personal employee information on reports" internal setting enabled. Contact SuiteProjects Pro Support to enable or disable this internal setting.

The "Hours Remaining" field in Timesheet Reports can also be hidden.

To hide the "Hours Remaining" field in Timesheet Reports:

1. Go to Administration > Application Settings > Timesheets > Timesheet report layout.
2. In the "Other" section of the Timesheet report layout form, select the "Hide "Hours remaining on tasks" section on timesheet reports" setting.

Organize Saved Reports in Specified Folder

Reports often fall into distinct categories such as Financials, Project status, Resource management, etc. As an account may have a high volume of saved reports, it is helpful to group specific reports together based on report type. With this feature, saved reports can now be organized into different report folders and sub-folders. Report folders can be expanded or collapsed depending on the need to view certain reports

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in a particular folder. In addition, folders can be shared with other users - reports within the folder will also be shared.

To enable this feature, contact SuiteProjects Pro Support.

Project Hierarchy Settings in User Detail Report

This feature enables a new "project hierarchy" value in the user detail report.

To enable this feature, contact SuiteProjects Pro Support.

Project Crosstab Date Filters

Use new filters to better define the scope of your reports.

The new filters include:

- Scheduled project start date
- Calculated project finish date
- Project created date

To enable this feature, contact SuiteProjects Pro Support.

Report Manager and Editor

The report management interface lets you:

1. Search report templates and saved reports by:
   - Name

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- Measures or attributes (columns) available for inclusion in the report
- Hierarchies or dimensions (rows) available for inclusion in the report

2. View the list of search results is updated as you enter search criteria. The results include tabular (detail) or crosstabbed (summary) report templates and saved reports you have access to. The search results show and lets you select all the available report actions.

3. Preview any report listed in the search results panel. The preview panel shows information about the report and a preview of the report layout. When previewing a report template, the preview layout includes any dimensions and measures entered in the search panel in the same order.

To enable this feature, contact SuiteProjects Pro Support.
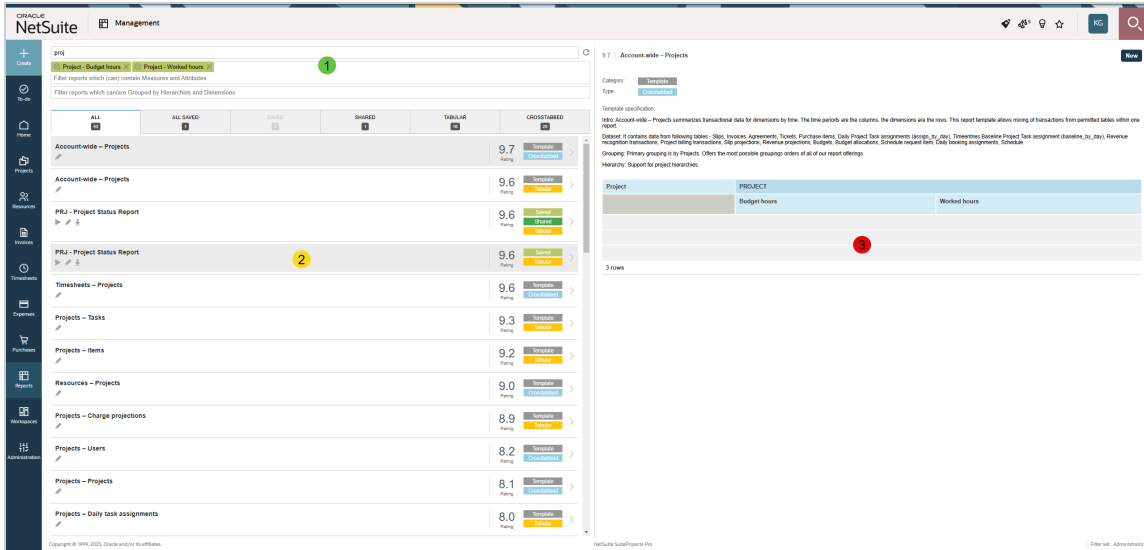
The report editor interface lets you:

- Create reports by dragging dimensions and measures into your rows and columns, and selecting filters.
- Preview your report layout as you create or edit the report.
- Preview the report data, run and view the full report directly from the report editor page.
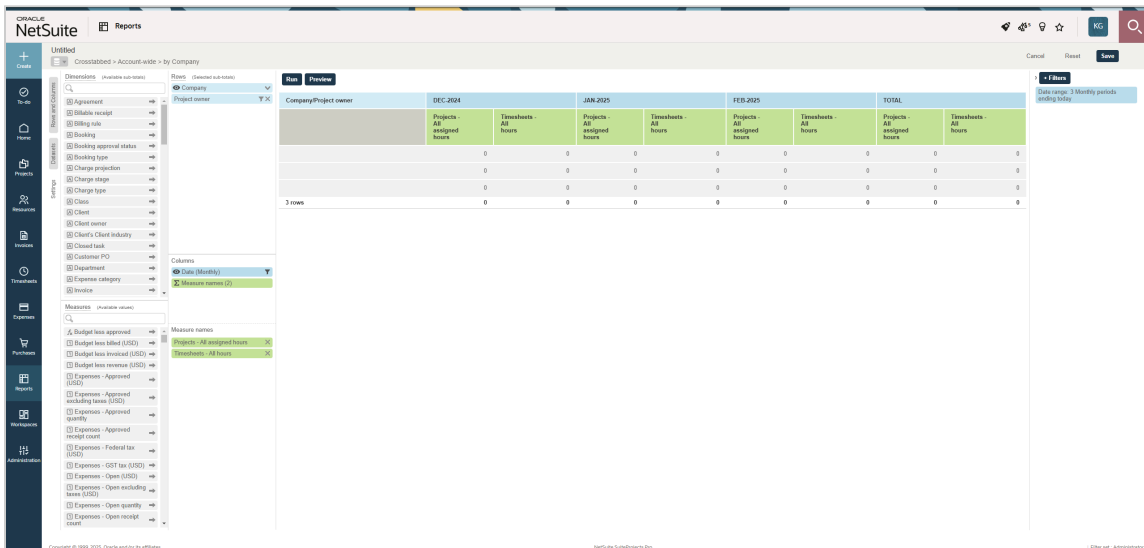
Report on More than 31 Days When Reporting on Daily Time Periods

For companies that run summary reports with daily time periods, the number of periods can be extended. By enabling this feature, users can choose to report up to either 60 or 90 days. This enhancement permits users to display report values in a daily view for multiple months at a time.

To enable this feature, contact SuiteProjects Pro Support.

Report Throttling

This feature limits the number of reports that a user can run in parallel. The limit can be set to a value between 1 and 10 for all users across the account. Individual users can be exempt from the limit (that is, allowed to run unlimited reports in parallel) by checking the **Disable Report Throttling** box in the demographic form for the user.

If you have reached the limit and you attempt to run a report, an error message appears showing the list of reports that are currently running. You can stop one of these currently running reports to proceed with the new run request. Alternatively, you can cancel the report run request and either schedule the report or try to run the report later.

To enable this feature, contact SuiteProjects Pro Support.

Stricter Permission Control for Extended Fields Derived from Employee Cost Information

Extend standard access control for extended fields and custom calculations derived from employee cost information.

By default, the access control rules for the operands used in a custom calculation apply to the custom calculation. A user can view custom calculations and other extended fields only if this user can view the standard fields, custom fields and extended fields used as operands in the extended field. Until now, the standard access control behavior did not apply to the following standard calculated fields derived from employee cost information. This feature extends standard access control so that users can only see the following fields and custom calculations using any of these fields as operands if their role allows them to view the relevant employee cost information.

- Projects – Projected cost [rules]
- Projects – Projected cost of unbillable hours [rules]
- Projects – Projected billing margin [rules]
- Projects – Projected billing [rules]

The following role permissions are supported:

- View all user costs
- View primary loaded cost
- View secondary loaded cost
- View tertiary loaded cost
- View and modify user cost

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> **ⓘ Note:** This extended access control currently does not apply to renamed built-in summary fields based on any of the extended field listed above, and any custom calculations using these renamed built-in summary fields.
>
> The Stricter Permission Control for Extended Fields Derived from Employee Cost Information feature is enabled by default. To disable the feature, contact SuiteProjects Pro Support.

Web Services Log Details Report

This feature adds the ability to include web service requests and responses within the application. This will help troubleshoot any API requests that fail.

To enable this feature, contact SuiteProjects Pro Support.

> **ⓘ Note:** This feature includes an optional component, which may be enabled to help troubleshoot any issues with the add-on services provided by SuiteProjects Pro.
>
> If you are using Web services log reports to track your API usage limits, note that API requests made by SuiteProjects Pro Mobile apps,SuiteProjects Pro Integration Manager and other SuiteProjects Pro add-on services do not count toward your usage limits.

> **⚠ Important:** The Web services log report feature has the following limitations:
>
> - If you do not use this feature for more than 30 days, the feature is disabled and the log entries are deleted.
> - Log entries are retained for 7 days only, then they are purged from the database.

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Platform

The following optional Platform features are available in SuiteProjects Pro. Some features require SuiteProjects Pro Support to enable them for you.

- API Access
- REST API
- Script Support for Web Service API Methods
- Script Support for HTTPS Methods
- User Scripting — Form Scripts
- User Scripting — Scheduled Scripts
- User Scripting — Unapprove Event

API Access

You can use our REST API, SOAP API and XML API to integrate your professional services data with your enterprise data. See the help topic API Overview.

SuiteProjects Pro API supports OAuth 2.0, a robust authorization framework. This authorization framework enables client applications to use a token to access SuiteProjects Pro through the API. The application accesses the protected resources on behalf of a user who gave an explicit permission for the access. This method eliminates the need for API integrations to store user credentials.

Before you begin using these services, review the best practice guidelines. See the help topics Security Considerations for Developers and API Best Practice Guidelines.

To request API access, contact your SuiteProjects Pro account manager.

REST API

SuiteProjects Pro REST API provides an interface for integration applications to exchange information with SuiteProjects Pro.

The REST API:

- Is organized around REST.
- Uses predictable resource-oriented URLs.
- Accepts JSON-encoded request bodies.
- Returns JSON-encoded responses.
- Uses standard HTTP response codes, authentication and verbs.

The REST API lets you:

- Use CRUD (create, read, update, delete) operations on SuiteProjects Pro records.
- Retrieve a list of records from a collections and use pagination.

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- Filter SuiteProjects Pro record collections.

The REST API is a service layer that is built on top of the business layer in SuiteProjects Pro. This ensures that business rules configured for your SuiteProjects Pro account are applied when an integration application interacts with your SuiteProjects Pro data through the REST API. Business rules include SuiteProjects Pro account configuration settings and access control mechanisms, as well as any user scripts deployed on your from the company's SuiteProjects Pro account.

The REST API supports OAuth 2.0 exclusively for authentication and authorization, which is a more robust and reliable way to access data.

If the REST API is enabled for your account, account administrators and employees with the Export data role permission can access the REST API definition in OpenAPI 3.0 JSON format. The generated documentation includes a full REST API reference including resource descriptions, endpoints and methods, parameters, request body and response examples and schema.

To enable the REST API, contact SuiteProjects Pro Support.

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> **ℹ Note:** API Access must be enabled for your account before you can enable the REST API. To obtain API Access, contact your SuiteProjects Pro account manager.

> **⚠ Important:** The REST API was introduced in the October 10, 2020 SuiteProjects Pro release. It is an initial version with limited functionality.
>
> Some optional features and application settings may not be fully supported.
>
> As with any other API or platform features, it is crucial that you test integration applications leveraging the REST API extensively on a Sandbox account. Make sure your integration applications run smoothly without error on a non-production account before you implement it on your production account.

Script Support for Web Service API Methods

This feature allows you to access NSOA.wsapi functions for user scripting.

> **ℹ Note:** To create user scripts, you need to be signed in as an administrator and be able to access the Scripting Center and Scripting Studio.

Script Support for HTTPS Methods

This feature allows you to access NSOA.https functions for user scripting.

Integrate SuiteProjects Pro with other online applications using outbound calls.

This feature allows you to access NSOA.https functions for user scripting and to run workflow processes automatically from SuiteProjects Pro across to other APIs, using form or scheduled scripts.
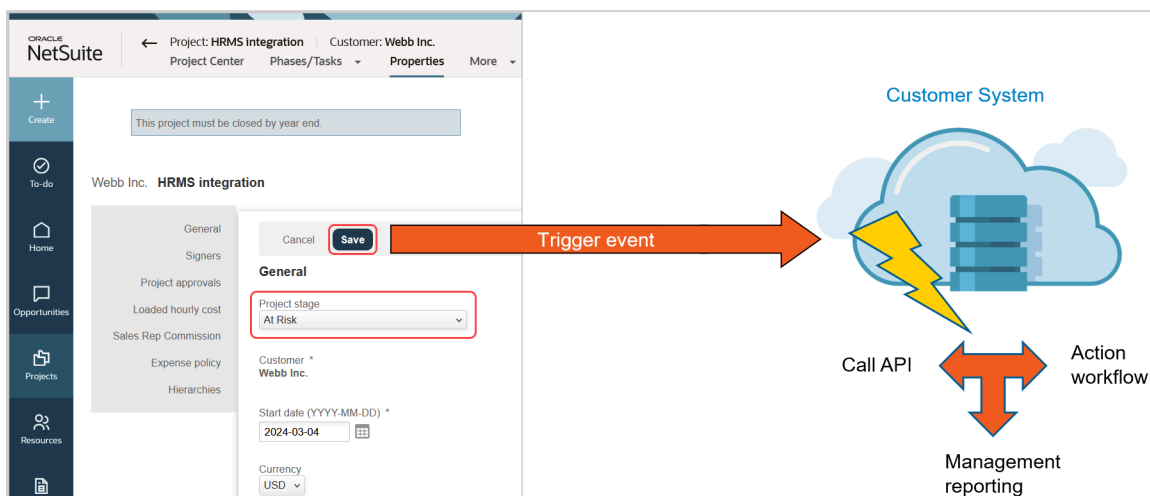
The feature includes:

- Five new NSOA functions supporting the HTTPS GET, POST, PUT, PATCH and DELETE request methods to read, send, update and delete data from/to external APIs.

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- A new Password script parameter, allowing you to store encrypted credentials and use them in your scripts for secure deployment and maintenance.

Possible use cases include integration with Jira for agile development, Slack for team collaboration, Office 365 for notifications, or other external or bespoke APIs in your environment.

> **ⓘ Note:** To create user scripts, you need to be signed in as an administrator and be able to access the Scripting Center and Scripting Studio.

User Scripting — Form Scripts

This feature lets you write user scripts in JavaScript programming language and associate them with trigger events on forms. The scripts will be executed when users interact with the form (submit, save, approve) and can be executed either before or after the action itself. Form scripts are executed within the context of the authenticated user interacting with the form.

User scripting includes several predefined function to interact with SuiteProjects Pro and the SOAP API.

The feature automatically enables the following functionality:

- The **Scripting center** list lets you access scripts and control all script deployments from a central location.
- The **Scripting studio** is a built-in script editor. You can use the scripting studio to create scripts, select the entrance function and trigger event, reference other scripts, and explore user scripting functions and SOAP objects, and more.
- **Form script deployment logs** showing the status of all deployed form scripts (Reports > Details).

For more information about User Scripting, see 📄 User Scripting.

A separate optional feature lets you write scripts that will be executed automatically according to a schedule. See User Scripting — Scheduled Scripts.

To enable this feature, contact SuiteProjects Pro Support.

User Scripting — Scheduled Scripts

This feature lets you write user scripts in JavaScript programming language that will be . Scheduled scripts are executed within the context of a specific user. When you deploy a scheduled script, you specify the day and time when the script will be executed, and the user under whom the script will be executed. Scheduled scripts have higher governance limits than form scripts.

User scripting includes several predefined function to interact with SuiteProjects Pro and the SOAP API.

The feature automatically enables the following functionality:

- The **Scripting center** list lets you access scripts and control all script deployments from a central location.
- The **Scripting studio** is a built-in script editor. You can use the scripting studio to create scripts, select the entrance function and trigger event, reference other scripts, and explore user scripting functions and SOAP objects, and more.
- **Scheduled script deployment logs** showing the status of all deployed scheduled scripts (Reports > Details).

For more information about User Scripting, see 📄 User Scripting.

A separate optional feature lets you write scripts that will be executed when users interacts with a specific form. See User Scripting — Form Scripts.

To enable this feature, contact SuiteProjects Pro Support.

User Scripting — Unapprove Event

Create scripts which are triggered when the following are unapproved:

- Timesheets
- Schedule Requests
- Booking Requests
- Bookings
- Purchase Requests
- Purchase Orders
- Expense Reports
- Invoices
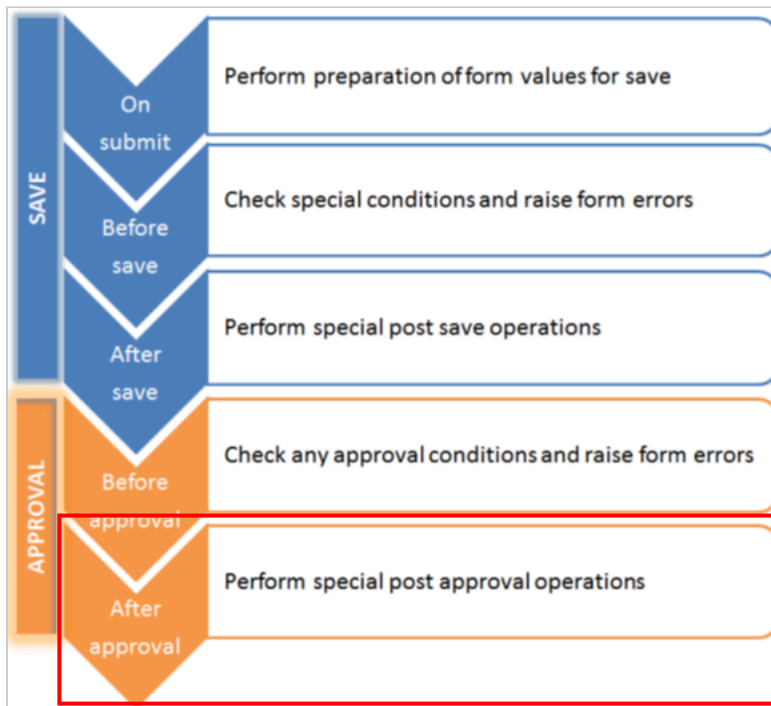
The format to use for when an "unapprove" argument is passed is:

```
1  function main(type) {
2      if (type == 'unapprove') {
3          // custom unapprove actions
4      }
5  }
```

To enable this feature, contact SuiteProjects Pro Support.

NetSuite Connector

The following optional NetSuite integration features are available in SuiteProjects Pro. Some features require SuiteProjects Pro Support to enable them for you.

- Increase the Maximum Count of NetSuite Integration Schedule Runs Per Day
- Loaded Cost Custom Import
- Multithreading Support for On-Demand and Real-Time Export
- Multithreading Support for the Main Integration
- NetSuite Connector Administration Form Editor Permission
- NetSuite Connector Settings History
- Prevent Saving NetSuite Connector Administration Form if Workflows are Scheduled or Set for Real-Time Integration

Increase the Maximum Count of NetSuite Integration Schedule Runs Per Day

You can increase the maximum number of scheduled NetSuite integration runs per day for your company's account. By default, the maximum number of scheduled runs per day is 10. It can be increased to allow up to 24 runs per day.

To enable this feature, contact SuiteProjects Pro Support.

Loaded Cost Custom Import

This feature enables you to create a custom import workflows to import information from a NetSuite custom record type into SuiteProjects Pro as loaded cost [loaded_cost] records.

SuiteProjects Pro lets you create custom workflows to import data from NetSuite service items or custom record types into a supported record type in SuiteProjects Pro using your own field mapping definitions. You can use a custom import workflow to import employee loaded cost information from a NetSuite custom record type into SuiteProjects Pro as loaded cost records. For more information about Custom import workflows, see the help topic Custom Import Workflows.

When you create a custom import workflow, you need to specify a custom field associated with the SuiteProjects Pro record. SuiteProjects Pro uses this custom field to store the internal ID of the corresponding NetSuite record. It is not possible to create custom fields for loaded cost records in SuiteProjects Pro.

Enabling the Loaded Cost Custom Import optional feature creates a custom field associated with the Loaded Cost record type [loaded_cost table]. The custom field name is netsuite_loaded_cost_id.

After you enable the Loaded Cost Custom Import feature, you can create a custom import workflow to import loaded cost information into SuiteProjects Pro from a custom record type in NetSuite. See the help topic Importing Records from NetSuite into SuiteProjects Pro Using Custom Workflows.

When creating the custom import workflow, use the following settings:

- **NetSuite record** – Select [Custom Record], and select the NetSuite custom record type holding employee loaded cost information from the **Specify** dropdown.

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> ✔ **Tip:** Click **Synchronize** to update the list of NetSuite custom record types without leaving the custom import workflow configuration form.

- **SuiteProjects Pro record** – Select Loaded cost.
- **ID field** – Select netsuite_loaded_cost_id__c

> ⓘ **Note:** Employee loaded cost information must be sourced from a custom record type in NetSuite. If loaded cost information is entered on the employee record in NetSuite, for example, additional customization is required to copy this information automatically to the relevant custom records so that it can be imported into SuiteProjects Pro. For more information about creating custom record types in NetSuite, see Creating Custom Record Types (External link to NetSuite SuiteAnswers | Answer ID: 10140).
>
> The netsuite_loaded_cost_id custom field is not visible on the SuiteProjects Pro UI.
>
> - To view the NetSuite internal ID for an imported loaded cost record, export the loaded_cost table using the Import/Export functionality in SuiteProjects Pro. For more information about the Import/Export functionality, see 📄 Administrator Guide.
> - To set the NetSuite internal ID for an existing loaded cost record, you need to use the SuiteProjects Pro XML API, SuiteProjects Pro SOAP API, or SuiteProjects Pro Integration Manager. As with all import workflows, if you have existing loaded cost records in SuiteProjects Pro, you should ensure that loaded cost custom imports do not create duplicate entries in SuiteProjects Pro. Setting the NetSuite internal ID for existing records is one way of doing so.

To enable this feature, contact SuiteProjects Pro Support.

Multithreading Support for On-Demand and Real-Time Export

Control how many threads the NetSuite Connector uses for integrations with SuiteCloud Plus.

If you have an active NetSuite SuiteCloud Plus license, you can enable multithreading support for on-demand and real-time export. You can request the maximum number of threads you want to allocate for the NetSuite integration.

- The value is set to 10 concurrent threads by default.
- You can request any maximum number of threads between 1 and 10.

After this feature is enabled, NetSuite Connector uses any available threads concurrently for the **real-time export** of records from SuiteProjects Pro to NetSuite.

To enable multithreading support for on-demand and real-time export, contact SuiteProjects Pro Support.

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> ℹ️ **Note:** You can also control the number of threads used to export records as part of the main integration. For more information, see Multithreading Support for the Main Integration.

> ⚠️ **Important:** To enable multithreading support, you must have an active NetSuite SuiteCloud Plus license. NetSuite SuiteCloud Plus allows up to 10 threads to be allocated concurrently for communication with NetSuite web services.
>
> If you do not have an active NetSuite SuiteCloud Plus, the NetSuite integration is limited to a single thread communication with NetSuite web services at all time.

Multithreading Support for the Main Integration

Increase throughput by enabling the main integration to use multiple threads concurrently.

The NetSuite integration can use multiple threads to export records from SuiteProjects Pro to NetSuite as part of main integration runs.

To enable multithreading support for the main integration, contact SuiteProjects Pro Support.

- Up to 10 threads can be allocated for main integration runs.
- Multithreading is supported only for export from SuiteProjects Pro to NetSuite and not for import from NetSuite to SuiteProjects Pro.

To enable multithreading support for the main integration, contact SuiteProjects Pro Support.

> ⚠️ **Important:** To enable multithreading support, you must have an active NetSuite SuiteCloud Plus license. NetSuite SuiteCloud Plus allows up to 10 threads to be allocated concurrently for communication with NetSuite web services.
>
> If you do not have an active NetSuite SuiteCloud Plus, the NetSuite integration is limited to a single thread communication with NetSuite web services at all time.

NetSuite Connector Administration Form Editor Permission

Account administrators with the relevant privilege can now save changes to the NetSuite Connector administration form without a password.

To let an account administrator edit settings on the NetSuite Connector administration form:

1. Contact SuiteProjects Pro Support and request the NetSuite Connector Administration Form Editor Permission optional feature.

2. In SuiteProjects Pro, go to Administration > Global settings > Users > Employees > [*Select an employee*] > Demographic.

3. Check the **View and edit NetSuite Connector administration form** box under the Optional features section. This employee demographic setting is not available if the employee is not an administrator, even if the employee has the "View and edit integration settings" role permission.

4. Click **Save**.

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By default, the Save button is disabled if there are any active scheduled or real-time integrations configured for your account. To make changes to the NetSuite Connector Administration form, first deactivate all scheduled and real-time integrations. To keep the Save button enabled at all time for authorized account administrators, check the "Do not prevent save on the NetSuite Connector administration form" box.

> ⚠️ **Important:** Make sure you read the documentation and consider changes carefully before you save the NetSuite Connector administration form. The integration may stop working, or may not work as expected and cause data corruption if configured incorrectly.

NetSuite Connector Settings History

View the history of integration configuration changes using the NetSuite Connector Settings History page.

To view the NetSuite Connector Settings History page, go to Administration > NetSuite Connector, click the Tips menu, then **View history settings**.

The history settings page opens in a new browser tab or window. It uses the redesigned user experience list layout and features. The list shows audit trail information transformed for better readability.

> ℹ️ **Note:** A simple change can create multiple rows in the settings history. For example, adding a workflow to the list of workflows also adds rows changes for all the mapping groups and mapping definition rows created when adding this workflow.
>
> The audit trail information shown on the NetSuite Connector Settings History is not yet fully optimized for readability and will be refined in a future release. For more information about reading the settings history list, see 📄 NetSuite Integration.

The list can include the following columns

- Name of the **Employee** who made the change.
- Name of the **Proxy Employee** — The name of the employee who made the change while signed in by proxy as the **Employee**.
- **Section** of the NetSuite Connector UI where the changes was made — The different sections correspond to the different tab on the New NetSuite Connector UI (Credentials, Automate, Real-time, Mapping), to a specific feature (Workflow group and Workflow group assignment), or to the NetSuite Connector administration and workflow settings forms(NetSuite Connector Administration).
- **Category** of the setting changed — Settings are grouped into categories that give additional information to help identify what was changed.
- The values in the **Tab** column shows the integration workflow and mapping group impacted by changes made to field mapping definitions.
- Internal **ID** of the **Setting** changed.
- **Description** of the **Setting** changed — Additional information to help identify what was changed.
- **Action** performed — Values include: Created, Updated, Deleted.
- **Date** the change was made.
- **Original value** before the change.
- **New value** after the change.
- **Change made via** — How the change was made. For example, the change could be made using the NetSuite Connector UI, by importing settings from a file.

To enable the NetSuite Connector Settings History feature, contact SuiteProjects Pro Support.

Employee	Section	Category	Setting Description	Action	Date	Original value	New value
All	All	All		All	All	All	All
Collins, Marc	Mapping	OpenAir field	OpenAir field 'Purchase_ite...	Created	09/07/21 04:27 AM		Purchase_item.date
Collins, Marc	Real-time	Active realtime row	on	Created	09/07/21 04:27 AM		1
Collins, Marc	Credentials	Value of the settings	TBA User Token ID	Updated	09/07/21 04:37 AM	c60429baa41...	85bfa8d4a464a9c74db31fc1bda3ab2c98f71af5...
Collins, Marc	Credentials	Value of the settings	TBA User Token secret	Updated	09/07/21 04:37 AM	[changed]	[changed]
Collins, Marc	Credentials	Value of the settings	Integration user	Updated	09/07/21 04:37 AM		Collins, Marc
Collins, Marc	NetSuite Connector Administration	Value of the switch	Verify invoice export	Updated	09/07/21 04:38 AM		1
Collins, Marc	NetSuite Connector Administration	Value of the switch	Loaded Cost (Custom Rec...	Updated	09/07/21 04:38 AM	1	
Collins, Marc	Workflow group	Workflow group name	All Exports	Created	09/07/21 04:39 AM		All Exports
Collins, Marc	Workflow group assignment	Active workflow group assignment	'All Exports' contains 'Reco...	Created	09/07/21 04:39 AM		1
Collins, Marc	Workflow group assignment	Active workflow group assignment	'All Exports' contains 'Expe...	Created	09/07/21 04:39 AM		1

Prevent Saving NetSuite Connector Administration Form if Workflows are Scheduled or Set for Real-Time Integration

This optional feature disables the Save button on the NetSuite Connector administration form if there are any active scheduled or real-time integrations configured for your account. This forces authorized account administrators to deactivate all scheduled and real-time integrations before they can make any changes to the NetSuite Connector administration form.

This feature provides additional protection on top of other form validation in place to avoid common errors when editing the NetSuite Connector administration settings.

To enable this feature, contact SuiteProjects Pro Support.

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Workspaces

The following Workspaces Security features are available in SuiteProjects Pro.

- Documents Bulk Deletion on Download
- Download All Documents Across All WorkSpaces

Documents Bulk Deletion on Download

This feature lets account administrators and users with the relevant role permission delete all documents from a workspace at the same time.

Account administrators control who can access that page using the following role permissions: **Download all documents** and **Delete all documents**.

To delete all documents in a workspace:

1. Go to Workspaces > [*Select a workspace*].
2. Click **Download all documents**.

   The Download all documents form appears
3. Check the **Delete all documents** box to delete the documents from SuiteProjects Pro after downloading them.

To enable this feature, contact SuiteProjects Pro Support.

Download All Documents Across All WorkSpaces

This feature lets account administrators and users with the relevant role permission download all documents across all workspaces from Administration > Application Settings > Workspaces > Download all documents.

Account administrators control who can access that page using the following role permission: Download all documents in all workspaces.

To enable this feature, contact SuiteProjects Pro Support.

Security

The following optional Security features are available in SuiteProjects Pro.

- IP Restriction
- Password Security Questions
- Password Validation Against Known Compromised Passwords
- PI Removal

IP Restriction

Specify which IP addresses are authorized to access your company's SuiteProjects Pro account. This includes access to your company's SuiteProjects Pro account using the SuiteProjects Pro UI, the SuiteProjects Pro API, or any client application utilizing the API to exchange information with your company's SuiteProjects Pro account.

This optional feature lets you store authorized IP addresses on the employee record for each user. You can allow single IP addresses or network ranges, using an explicit range or subnet mask. The IP Restriction feature may be used to ensure users can only access your company's SuiteProjects Pro account if they are connected to your company's physical network or VPN, for example.

Feature Extensions

- **IP Restriction Check for IP Change** — You can extend the IP Restriction feature to check for IP address changes with every API request. In this case, if the IP address of the authenticated user's device changes and the new IP address is not in the IP address allowlist for this user, API requests return an error, and client applications utilizing the API can no longer exchange information with your company's SuiteProjects Pro account. If the client applications utilizes the OAuth 2.0 authorization framework to connect to SuiteProjects Pro, the OAuth 2.0 access and refresh tokens become invalid.

  If the IP address of the authenticated user's device changes and the new IP address is not in the IP address allowlist for this user, the user can continue using the SuiteProjects Pro UI normally until the user signs out or the session times out. This is true whether the user is accessing the SuiteProjects Pro UI as a standalone application, or within NetSuite using the Single Sign-On integration feature.

> (i) **Note:** Client applications utilizing SuiteProjects Pro API include:
>
> - SuiteProjects Pro Mobile.
> - Other add-on services supplied by SuiteProjects Pro (Integration Manager, Exchange Integration Manager, Project Connector, Outlook Connector, OffLine).
> - Any bespoke integration utilizing the REST API, SOAP API, or XML API.

To enable this feature the IP Restriction or the IP Restriction Check for IP Change, contact SuiteProjects Pro Support. Additional setup is required for the IP restriction feature — for more information, see 📕 Security.

Password Security Questions

Security questions are used to verify the identity of a user to reset a password and regain access to SuiteProjects Pro.

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After this optional feature is enabled, new account users must set up security questions the first time they sign in to SuiteProjects Pro and existing account users must set up security questions when they change your password.

After a user sets up security questions in SuiteProjects Pro they can reset their password or unlock their user account without the intervention of an account administrator. To reset a password or unlock a user account, the user can click the **Reset password or unlock account** link on the SuiteProjects Pro sign-in page and enter their Company ID, User ID and email address. If these details are verified, the user must answer a security challenge. If all questions are answered correctly, SuiteProjects Pro sends a temporary password to the users's email address.

This feature reduces some of the administrative burden associated with unlocking user accounts.

For more information about using the Password Security Questions feature, see the help topics Setting Up Security Questions and Resetting Your SuiteProjects Pro Password.

> ⓘ **Note:** Review the following guidelines:
>
> - If you require answers to the security questions to have a minimum lengths, ask SuiteProjects Pro Support to change the minimum number of characters each answer must contain.
> - System emails are disabled by default on sandbox accounts. The **Forgot your password or ID?** and **Reset password or unlock account** links can only be used on production accounts.

To enable this feature, contact SuiteProjects Pro Support.

Password Validation Against Known Compromised Passwords

Validate new passwords against a list of known compromised passwords when an employee attempts to change password.

When this optional feature is enabled for your account, SuiteProjects Pro validates new passwords against a list of compromised passwords and will require users to enter a different password if the new password is on a regularly updated list of known compromised passwords.

> ⓘ **Note:** This is not applicable for temporary passwords set by administrators.

To enable this feature, contact SuiteProjects Pro Support.

PI Removal

Let authorized users request and process the removal of personally identifiable information (PII) from employee, contact and customer records.

Personally identifiable information (PII) is data that can be used to determine a person's identity. Rules and regulations about PII vary by country, but usually include strict guidelines covering personal information acquisition, storage, and removal. The right to be forgotten is one of the key requirements in recent privacy laws, including in General Data Protection Regulation (GDPR). Administrators can use the PI Removal feature to replace the data stored in SuiteProjects Pro with a standard value depending on the field type.

The PI Removal feature:

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- Remove personal information (PI) from relevant standard, custom, and audit trail fields. See Supported Field Types and Fields.
- Improves compliance with privacy regulation.
- Permits an authorized user to remove personal information without contacting SuiteProjects Pro Support.

You can create, submit, and approve individual PI removal requests from within SuiteProjects Pro. You can view all the requests that have been submitted, including who created the request, when it was created, and the current status of the request. See Reviewing, Creating, Submitting, Approving, Rejecting, or Canceling a PII Redaction Requests.

Submitted PI removal requests must be approved before they are queued for processing. SuiteProjects Pro processes approved PI removal request automatically on a set day and time each week. PI removal requests approved in the last 72 hours at the time of processing are not processed immediately but the following week. This allows a minimum of 72 hours to cancel an approved PI removal request, should it be required.

After a PI removal request is processed, the PII is redacted permanently from SuiteProjects Pro and the status of the PI removal request shows as completed. Users with the appropriate privileges can cancel the request at any time before its status shows as completed.

Email notifications are sent to users with the relevant access privilege. Employes who can approve PI removal requests receive an email notification when a request is submitted. Employees who can either create or approve PI removal requests receive an email notification when a request is approved, rejected, or canceled.

To enable this feature, contact SuiteProjects Pro Support.

User Privileges

The following user privileges are available for PI Removal feature:

- **Allow employee to create PI removal requests** – User can view, create, edit, submit, duplicate and cancel requests.
- **Allow employee to approve PI removal requests** – User can view, approve or reject, and cancel requests.

Account administrators who do not have either of these user privileges can view and cancel PI removal requests.

> **ⓘ Note:** By default, PI removal requests must be submitted and approved by different employees.
>
> You should designate at least two employees to use the PI removal feature so that requests are created and approved by different employees.
>
> You can allow the same employee to create and approve a PI removal request. To do so, contact SuiteProjects Pro Support and request the **PII Redaction – Cumulative Create and Approve Privileges** feature extension.

Supported Field Types and Fields

The PI Removal feature supports removal of information for the following field types. All redacted values are replaced with "***********", except where indicated otherwise in the following list.

- Audit trail – Redacted value replaced by "`PI Redacted by user.id <userId>`" where <userId> is the internal ID for the employee who submitted the PI removal request.

    > ⓘ **Note:** When the PI removal request is processed, SuiteProjects Pro redacts only the audit trail information for the standard and custom fields that are redacted as part of the same PI removal request.

- Date – Redacted value replaced by "`1900-01-01`"

- Datetime – Redacted value replaced by "`1900-01-01 00:00:00`"

- Numeric – Redacted value replaced by "`0`"

- Password (such as security answers, for example, if the Password Security Questions feature is enabled for your account – see Password Security Questions)

- Text

- Text area

- URL

Information in both standard and custom fields can be redacted. The following table lists the record types and fields you can remove information from.

Record Type	Standard Fields	Custom Field Types	Audit trail [audit]
Contact	Email [email], exported, Fax [fax], First name [first], Job title [job_title], Last name [last], Mobile [mobile], Nickname [name], Notes [notes], Phone [phone],Title [salutation]	Date, Numeric, Text, Text area, URL	✅
Customer	Address [address1, address2, address3, address4], City [city],Company name [company], Country [country], Email [email], Fax [fax], Email invoice text [invoice_email_text], Invoice prefix [invoice_prefix], Invoice note [invoice_text], Nickname [name], Notes [notes], Phone [phone], Rate [rate], State/Province [state], Payment terms [terms], Web address [web], ZIP/Postal code [zip]	Date, Numeric, Text, Text area, URL	✅
User (Employee or Guest)	Address [address1, address2, address3, address4], City [city], Country [country], Email [email], Fax [fax], First name [first], Password hint [hint], Last name [last], Middle name [middle], Mobile [mobile], Employee [name], Employee ID [nickname], Phone [phone], Rate [rate], Title [salutation], Security answer 1 [security_answer1], Security answer 2 [security_answer2], Security answer 3 [security_answer3], State/Province [state], ZIP/Postal code [zip]	Date, Numeric, Text, Text area, URL	✅
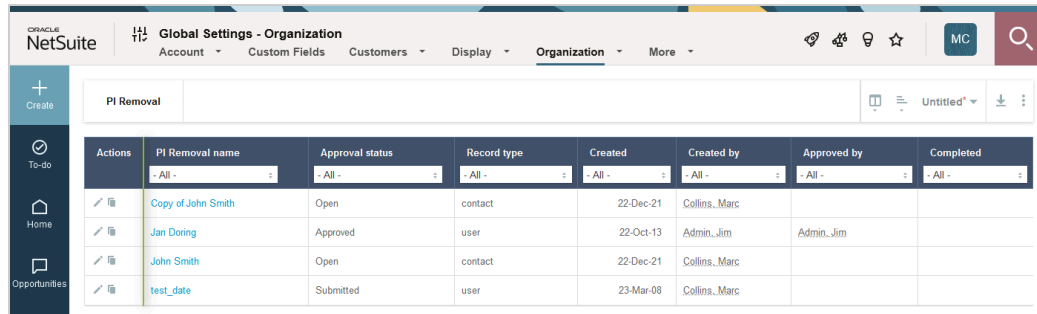
Reviewing, Creating, Submitting, Approving, Rejecting, or Canceling a PII Redaction Requests

If the PI Removal feature is enabled for your company's SuiteProjects Pro account, depending on your user privileges, you can review, create, submit, approve, reject, or cancel personally identifiable information (PII) redaction requests.

To review, create, submit, approve, reject, or cancel a PI removal request

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1. Go to Administration > Global Settings > Organization > PII Removal (Administrator).

   For each request, you can see the PI removal request name, the record type, when it was created, who created the request, who approved it, and the request status. The request status can be Open (request created but not submitted for approval), Submitted, Approved, Rejected, Terminated (approved request subsequently canceled), or Completed (request processed and information removed).

2. To view the details of each request, click the PI removal request name or the Edit icon under the Actions column. On the PI removal request form, you can see which records, and fields were, or are yet to be removed, and the redaction request includes the audit trail. If the request was not submitted, you can edit the request details.

3. To create a new PI removal request, click the Create button then **New PI removal request**.

   A form appears.

4. Select the type of record you want to redact information from, then click **Continue**.

   The PI removal request form appears.

a. Enter a **PI removal request name**.

b. Select the **Record** to redact information from.

The dropdown lists records identified by their internal ID in square brackets, followed by their Name (Employee records) or Nickname (Contacts and Customers).

c. Select the **Fields** containing the information to be redacted. You can select multiple fields to be redacted at the same time.

d. Check the **Redact audit trail** box if you want to redact the audit trail information.

e. Click **Save** or **Save and Submit**. You cannot edit a PI removal request after you submit it.

5. To make a copy of a PI removal request, click the Clone icon 🗐 under the Actions column, change details as required on the PI removal request form, then click **Save** or **Save and Submit**.

6. To approve or reject a submitted PI removal request, click the PI removal request name then click **Approve** or **Reject**.

7. To cancel an approved PI removal request, go to the PI removal request and click **Terminate**. Canceled PI removal requests cannot be modified or resubmitted. To redact PII for the same record, create and submit a new PI removal request.

Release History

This section lists the features described under Optional Features by the feature release date.

> ✔️ **Tip:** Use this list to identify the features that have been released since your last update.

Interim

- Moved Deleted Attachment Recovery from the Administrator Guide.
- Updated Display Incomplete Tasks on Dashboard – The feature controls whether pending tasks are included in the to-do list as well as in the My status and Company status portlets on the classic homepage.
- Updated Forex Precision Control for Invoices to show only supported currencies with a precision other than 2 decimal places.
- Deleted **Loaded Cost Respects Time Entry Date Regardless of Date to Use Value in Reports** – Standard functionality. See the help topic Reporting Options.
- Deleted **Set Preferred Landing Page for Projects** – Standard functionality. See the help topics Preferred landing page for projects and Other Settings.

October 12, 2024

- Added Global Search — Search and quickly go to any of the create actions, lists, tools and settings pages accessible from the navigation menu, or search for a customer, project, employee or resource.
- Added Next-Generation Homepage — View up to 12 sections of information across three content regions in a new homepage.
- Added To-Do List — View a list summarizing items that require your action from any area of SuiteProjects Pro.
- Updated Inline-Editing in Lists — Change the selected values in multiple selection standard and custom fields from inline-editable lists.

April 13, 2024

- Added Proxy Approver Notifications — Existing feature newly documented in this guide (available since September 18, 2010).
- Expanded Loaded Cost Custom Import with additional information and cross-references.
- Moved **Use Account-Specific Domain** under the Administrator Guide. Account-specific domain are used for all SuiteProjects Pro accounts since February 2020 and must be used to connect to all SuiteProjects Pro services since 2023.1 – See the help topic Your Account URLs.
- Deleted **SuiteProjects Pro Within NetSuite and Real-Time Record Import Using OAuth 2.0** – Changed to a NetSuite Connector administration setting Use OAuth 2.0 for NetSuite Single Sign-On Integration and Real-Time Record Import.

October 7, 2023

- Added Access All Tasks — Existing feature newly documented in this guide (available since June 11, 2005).

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- Added All Item Types in Calendar — Existing feature newly documented in this guide (available since October 7, 2006).

- Added Custom Fields for Projects as Columns on Charges Lists — Add columns for custom fields associated with project records to charges lists.

- Added **SuiteProjects Pro Within NetSuite and Real-Time Record Import Using OAuth 2.0** — Use the NetSuite as OIDC Provider feature to access SuiteProjects Pro from within the NetSuite UI and to allow real-time record import from NetSuite into SuiteProjects Pro. Changed to an NetSuite Connector administration setting – See the help topic Use OAuth 2.0 for NetSuite Single Sign-On Integration and Real-Time Record Import.

- Added Stricter Permission Control for Extended Fields Derived from Employee Cost Information — Extend standard access control for extended fields and custom calculations derived from employee cost information.

- Updated Attachment Viewer and Attachment Thumbnail — Preview PDF attachment files, view attachment thumbnails and preview attachment files from expenses lists, click a thumbnail in the attachment viewer navigation bar to view the attachment file in the preview pane.

- Updated Inline-Editing in Lists — Use inline-editing in projects and saved reports lists. The topic is now located under Global.

- Expanded Close a Task for a Specific Employee for Timesheets and Expenses with additional information about the feature and compatibility guidelines.

- Expanded Exclude Project from Charge Projections with additional information about feature implementation.

April 15, 2023

- Added Attachment Viewer and Attachment Thumbnail — View attachments directly from the UI and view autogenerated thumbnail images for each attachment on selected forms and lists.

- Added Loaded Cost Custom Import — Create custom import workflows for employee loaded costs in the NetSuite integration.

- Added PI Removal — Let authorized SuiteProjects Pro users request and process the removal of personally identifiable information (PII) for employee, guest user, contact and customer records from SuiteProjects Pro records, fields, and audit trails.

- Added Quick Audit Trail for Global Settings — Existing feature newly documented in this guide (available since January 17, 2009).

- Updated "Assigned to" Column Filter in Task List — Feature behavior was changed.

- Updated IP Restriction — Extend the IP Restriction feature to check for IP changes with every API request.

- Updated Single Sign-On Integration Leveraging SAML — Added note about the upcoming "Legacy profile" end of support.

- Updated Quick Audit Trail for Custom Fields — Renamed feature (was: View Audit Information for Custom Fields in Table Format on Forms) and added information about Custom Field Extended Audit feature extension.

- Deleted **Self-Service SAML Identity Provider Profile Configuration** — Now available as standard when the Single Sign-On Integration Leveraging SAML is enabled. Added note about the upcoming "Legacy profile" end of support.

- Deleted **New NetSuite Connector UI** — Available as standard when the NetSuite integration is enabled.

- Deleted **QuickViews for Bookings**, **QuickViews for Employees**, **QuickViews for Projects**, **QuickViews for Tasks** — Administrators can enable QuickViews in the Administration module. See 📄 User Guide and 📄 Administrator Guide.

October 8, 2022

- Added "Assigned to" Column Filter in Task List — Column filters for the **Assigned to** in the Project > Tasks list
- Added Product Updates Panel — New release highlights and other product updates accessible from the SuiteProjects Pro UI.
- Added **Self-Service SAML Identity Provider Profile Configuration** — Support for multiple identity provider configuration managed by account administrators.
- Added Task on Purchase Requests — Existing feature newly documented in this guide (available since October 17, 2015).
- Deleted **Redesigned User Experience** — The redesigned user experience is enabled for all accounts.
- Deleted **Redesigned User Experience Phase 1** — The redesigned user experience is enabled for all accounts.
- Deleted **Redesigned User Experience Phase 2** — The redesigned user experience is enabled for all accounts.

April 9, 2022

- Added Redesigned Advanced Filters — Gain usability and canvas space when viewing, modifying or managing advanced filters.
- Updated Project Center, previously available as **Project Center Outline View (Redesigned User Experience)** — All project center functionality is now available as part of the Project Center optional feature.
- Added Documents Bulk Deletion on Download — Existing feature newly documented in this guide (available since June 10, 2004).
- Added Download All Documents Across All WorkSpaces — Existing feature newly documented in this guide (available since December 16, 2006).
- Added IP Restriction — Existing feature newly documented in this guide (available since November 22, 2008).
- Added Password Security Questions — Existing feature newly documented in this guide (available since May 15, 2010).
- Added Password Validation Against Known Compromised Passwords — Validate new passwords against a list of known compromised passwords when an employee attempts to change password.
- Deleted **Project Center Booking Worksheet (Redesigned User Experience)** — All project center functionality is now available as part of Project Center.
- Deleted **Real-Time Import Validation** — The feature is now default behavior. See 📄 NetSuite Integration.

October 9, 2021

- Added **Real-Time Import Validation** — Prevent the creation of duplicate records in SuiteProjects Pro when importing a record from NetSuite to SuiteProjects Pro using the real-time integration.

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- Added Restrict Project Recalculation to Tasks Impacted by the Changes on the Project Outline, Gantt and Task Detail View — Improve the performance of the project outline, Gantt and task detail view by restricting project recalculation to tasks that are impacted by the changes.

- Added Restrict Utilization Recalculation to Resources Impacted by the Changes on the Advanced Booking Worksheet — Improve the performance of the advanced booking worksheet by restricting utilization recalculation to resources that are impacted by the changes.

- Added NetSuite Connector Settings History — View the history of integration configuration changes.

- Updated Attachment File Drag and Drop — Added bulk delete and bulk attach actions, as well as support for dragging folders to attach all files within.

- Updated Feature-Specific User Satisfaction Feedback Form — User feedback is also gathered for the following Redesigned User Experience features:

  - Create button and Create New menu
  - Redesigned lists and list toolbar

- Added Automatic Backup Service — Existing feature newly documented in this guide.

- Added Multicurrency — Existing feature newly documented in this guide.

- Renamed and moved Prioritize Recorded Time Over Booked Time for Charge and Revenue Recognition Projection under Projects (was "Revenue Recognition Projections Prioritize Logged Time Over Booked Time" under Invoices).

- Revised Portfolio Projects and Subordinate Projects and added a separate entry for Single Billing Cap Across Multiple Subprojects Within a Portfolio Project — Revised content and additional information about these separate features, previously described under the same heading **Create Portfolio and Sub Projects and Share Billing Rule Caps across Multiple Projects**.

- Deleted **Automatic Backup Service Confirmation on File Transfer Completion** — Configuration option available by default when the Automatic Backup Service is enabled. For more information, see
  📄 Administrator Guide.

- Deleted **Automatic Backup Service (ABS) MySQL Import File "Apply Relationships" Option** — Configuration option available by default when the Automatic Backup Service is enabled. For more information, see 📄 Administrator Guide.

- Deleted **Automatic Backup Service (ABS) MySQL Import File UTF-8 Option** — Configuration option available by default when the Automatic Backup Service is enabled. For more information, see
  📄 Administrator Guide.

- Deleted **Automatic Backup Service (ABS) Passive Mode Option for FTPS Transfers** — The FTPS protocol in the Automatic Backup Service is no longer supported with effect from January 20, 2021.

- Deleted **Color-Coding on Actual versus Planned View** — This functionality is part of the Project Budget feature.

- Deleted **Compare Budgets** — This functionality is part of the Project Budget feature.

- Deleted **Contact Information Fields on Tabular and Crosstabbed Reports and Lists** — This functionality is part of the Customer Contact Information in Project Properties feature.

- Deleted **Custom Booking Approvals Notifications** — The functionality is part of the Custom Email Notifications optional feature.

- Deleted **Custom Form Layouts** — The feature is available by default. For more information, see .

- Deleted **Customizable Skill Level Descriptions** — The feature is available by default when the Resources module is enabled. For more information, see 📄 Administrator Guide.

- Deleted **Customization Center** — The feature is available by default. For more information, see
  📄 Administrator Guide.

- Deleted **Customize Resource Compare View Header** — The feature is available by default when the Resources module is enabled. For more information, see 📄 Administrator Guide.

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- Deleted **Display Payroll Type Field on Time Entries List** — The feature is available by default.

- Deleted **Edit Resource Demand Requests After Submittal** — The functionality is available by default when the following features are enabled: Resource Demand Request and Enable a Booking Type to Exist in All Approval Statuses.

- Deleted **Export XSD Schema Files** — The feature is available by default. For more information, see the help topic XML Schema Definitions.

- Deleted **Extended Project Assignment Profile Option** — The functionality is available by default when the following features are enabled: Project Assignment Profiles and Automated Search Engine for Booking Creation.

- Deleted **Generate Account Specific WSDL** — The feature is available by default. For more information, see the help topic Account-Specific SuiteProjects Pro WSDL Definition.

- Deleted **Ignore Booked Hours If Worked or Approved Hours Are Logged** — Duplicate of Prioritize Recorded Time Over Booked Time for Charge and Revenue Recognition Projection.

- Deleted **Include "Time Entry Payroll Type" in Invoices** — The feature is available by default. You can set up invoice layouts to add the time entry payroll type column or group time entries by payroll type. See 📄 Administrator Guide.

- Deleted **Next-Generation Report Editor** — The feature is part of the Report Manager and Editor feature.

- Deleted **SuiteProjects Pro Help Center** — This feature is enabled by default with effect from October 9, 2021. For more information, see 📄 Administrator Guide.

- Deleted **Performance Console** — The feature is available by default. For more information, see 📄 Administrator Guide.

- Deleted **Prevent Deletion of Users Assigned to Tasks with Logged Hours** — The feature is available by default . For more information, see 📄 Administrator Guide.

- Deleted **QuickView Customization Options** — Configuration option available by default when any of the QuickViews optional features are enabled.

- Deleted **Resource Demand Request "Essential" Category for Search Base Criteria** — The feature is enabled by default when Resource Demand Request is enabled. For more information, see 📄 Administrator Guide.

- Deleted **Resource Icons on the Outline and Gantt View** — The functionality is part of the User-Level Outline View feature.

- Deleted **Restricted Skills in Consolidated Resource Profile** — This functionality is part of the Resource Profile Type Access Control feature.

- Deleted **Script Deployment Logs** — The functionality is available by default when one of the following features is enabled: User Scripting — Form Scripts or User Scripting — Scheduled Scripts.

- Deleted **Scripting Center** — The functionality is available by default when one of the following features is enabled: User Scripting — Form Scripts or User Scripting — Scheduled Scripts.

- Deleted **Scripting Studio** — The functionality is available by default when one of the following features is enabled: User Scripting — Form Scripts or User Scripting — Scheduled Scripts.

- Deleted **Select Period for Attachments Backup in Automatic Backup System (ABS)** — Configuration option available by default when the Automatic Backup Service is enabled. For more information, see 📄 Administrator Guide.

- Deleted **Set Credit Invoice Date When Creating Invoices for Credit/Rebill** — This functionality is part of the Credit and Rebill Functionality for Invoices feature.

- Deleted **Streamlined Budget Approvals** - This functionality is part of the Project Budget feature.

- Deleted **Update Time Entries Based on Booking Types** — This is a Timesheets application setting. See 📄 Administrator Guide.

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- Deleted **User Scripting** — The functionality is part of the User Scripting — Form Scripts and User Scripting — Scheduled Scripts features.
- Deleted **Verify Password Change** — Users are now required to provide their current password when changing password by default.

April 10, 2021

- Added Allow employees with appropriate permissions to add project based items when they do not have permission to modify the project.
- Added Attachment File Drag and Drop.
- Added NetSuite Connector Administration Form Editor Permission.
- Added Prevent Saving NetSuite Connector Administration Form if Workflows are Scheduled or Set for Real-Time Integration.
- Added Extended Character Set Support for List Sorting and Filtering — Existing feature newly documented in this guide.
- Updated Feature-Specific User Satisfaction Feedback Form — User feedback is also gathered for the project center, the outline, Gantt and task detail view, the Expenses module, and the receipt attachments user interface.
- Updated Multithreading Support for the Main Integration — Up to 10 threads can be allocated for main integration runs.
- Updated Redesigned Administration Module — Now enabled by default.
- Updated Wrap Text in List Cells — The feature now supports line feeds. Display options for long text cell do not impact the **description** column in the billing and recognition rules lists.
- Removed **Enforce Column Filter Value Search (Redesigned User Experience)** — superseded by a standard feature. For more information, see 📄 User Guide.
- Removed **High-Frequency Real-Time Support** — Standard NetSuite integration feature. For more information, see 📄 NetSuite Integration.
- Removed **Import Taxes Applied to Exported SuiteProjects Pro Credits** — The feature is controlled on the Workflow settings for the Send SuiteProjects Pro Credit (Negative Invoice) as NetSuite Credit Memo export workflow in the NetSuite Connector UI. For more information, see 📄 NetSuite Integration.
- Removed **Integrate All Viable Time Entries** — The feature is controlled on the Workflow settings for the Time Entries (Time) export workflow in the NetSuite Connector UI. For more information, see 📄 NetSuite Integration.
- Removed **List smart rendering (Redesigned User Experience)** — Now a standard functionality with the Redesigned User Experience feature. For more information, see 📄 User Guide.
- Removed **Metavalues in Entity Filters** — Standard feature.
- Removed **NetSuite Connector Import/Export Settings** — Standard NetSuite integration feature. For more information, see 📄 NetSuite Integration.
- Removed **SuiteProjects Pro Revenue Recognition Rules and Transactions with NetSuite Advanced Revenue Management (ARM)** — The feature is controlled by account administrators on the NetSuite Connector administration form. For more information, see 📄 NetSuite Integration.
- Removed **Purchase Requests Integrated on Approval** — Standard NetSuite integration feature. For more information, see 📄 NetSuite Integration.
- Removed **Resource Compare View** — The resource compare view is available by default when the Resources module is enabled. For more information, see 📄 Administrator Guide.

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October 10, 2020

- Added REST API.
- Added **Project Center Booking Worksheet (Redesigned User Experience)** (deleted in April 9, 2022 SuiteProjects Pro release — All project center functionality is now available as part of Project Center.
- Added Redesigned Administration Module
- Added Save Invoices Short URL
- Added Save Payment Terms Internal ID on Invoice Records
- Added API Access — Existing feature newly documented in this guide.
- Updated Inline-Editing in Lists
- Updated Project Center
- Updated Redesigned User Experience Phase 2
- Updated Redesigned User Experience Phase 3
- Updated Custom List Layouts
- Removed **Active Directory Integration** — No longer supported.
- Removed **Token-Based Authentication (TBA) for NetSuite Connector** — NetSuite Connector now uses token-based authentication exclusively by default to connect to NetSuite.
- Removed **Use TBA Authentication Exclusively** — NetSuite Connector now uses token-based authentication exclusively by default to connect to NetSuite.

April 18, 2020

- Added Date Filters Support for Incurred Vs. Forecast Revenue Recognition Transactions
- Added Detailed Booking Groupings in the Advanced Booking Worksheet
- Added Display Incomplete Tasks on Dashboard
- Added **Enforce Column Filter Value Search (Redesigned User Experience)** (Removed in April 10, 2021)
- Added **List smart rendering (Redesigned User Experience)** (Removed in April 10, 2021)
- Added Multithreading Support for the Main Integration
- Added Wrap Text in List Cells
- Updated **Active Directory Integration** (Removed in October 10, 2020)
- Updated Business Intelligence Connector
- Updated Redesigned User Experience Phase 2

October 12, 2019

- Added Project Center
- Added Your Account URLs

April 13, 2019

- Added Redesigned User Experience Phase 3

- Updated Redesigned User Experience Phase 2
- Added Inline-Editing in Lists
- Added **Use TBA Authentication Exclusively** (Removed in October 10, 2020)
- Added Script Support for HTTPS Methods
- Added Feature-Specific User Satisfaction Feedback Form

October 13, 2018

- Booking Assignment Date Filters
- Customized User Avatars
- Decouple RDR Header and RRQ Booking Type
- Redesigned User Experience Phase 2

April 14, 2018

- Project Crosstab Date Filters
- Publish Shared Reports using BI Connector
- Redesigned User Experience
- Custom List Layouts
- Replace Non-Alphanumeric Characters with Underscores in Column Titles and Metadata
- **Verify Password Change** (Removed in October 9, 2021)

October 14, 2017

- Estimate to Complete (ETC) and Estimate at Completion (EAC) in Project Budgets
- Multithreading Support for On-Demand and Real-Time Export
- Business Intelligence Connector
- Show Billing Rules on Revenue Recognition Forms
- **Token-Based Authentication (TBA) for NetSuite Connector** (Removed in October 10, 2020)
- View Advanced Resource Search Role Permission

April 15, 2017

- Consolidated Resource Profiles
- Display More Bookings in Advanced Booking Worksheet
- Hide Personal User Data and Hours Remaining in the Timesheet Report
- **SuiteProjects Pro Help Center** (Removed in October 9, 2021)
- Task Worksheet
- Project Status News Feed
- Query Builder

- "Require Job Code" Setting for Dynamic and Advanced Booking Worksheets
- Skills Approvals

October 15, 2016

- Advanced Booking Worksheet
- Allow Users to Unapprove Budgets
- Field Order
- Prioritize Recorded Time Over Booked Time for Charge and Revenue Recognition Projection
- List Column Selection
- Project Status Summaries (PSS)
- Resource Demand Request Queues Cannot be Finalized If Availability is Zero

April 16, 2016

- Customer Contact Information in Project Properties
- Forex Precision Control for Invoices
- Optional Booking on Approved Booking Requests
- User Scripting — Unapprove Event

October 17, 2015

- **New NetSuite Connector UI**
- Increase the Maximum Count of NetSuite Integration Schedule Runs Per Day
- Report Manager and Editor

April 18, 2015

- Add Multiple Profiles
- Automatically Create Overlapping Timesheet
- Project Budget
- Control Editing Submitted Entities by Approvers via Role Permissions
- CSV Pivot Tables Can Respect User Regional Settings
- Exclude Project from Charge Projections
- Hide the Daily, Weekly, or Monthly Resource Planner Options

October 18, 2014

- Additional Booking Specific Approvers
- Automating Tax Location

- Bulk Booking Editor
- Close a Task for a Specific Employee for Timesheets and Expenses
- Display the Booking's Requester Name in "Last Name, First Name Middle Name" Format in Reports
- Generate Charges for Partial Periods
- Hide the Project Progress Bar
- User Scripting — Scheduled Scripts
- Stop Slow Lists
- Stop Slow Reports
- View All Receipts on One List

May 17, 2014

- Allow the Owner/Requester/Administrator to Upload Attachments for Approved Objects
- Customization Center
- Inline Editing, Drag-and-Drop Functionality, and Enhanced Gantt Layout
- Negative Charge Stages by Quantity
- Prevent Invoicing and Revenue Recognition Per Customer PO and Agreement
- Report Throttling
- Resource Planner
- Web Services Log Details Report

February 15, 2014

- Adjust an Approved Expense Report
- Custom Fields Available as Filters in Selected Reports
- Negative Charge Stages
- Phase/Task Filter in "Incurred vs. Forecast Rule"
- Pro-Rate Selected Charges
- Resource Demand Request
- Subtotal and Sort Expense Item Groups on Invoices

November 16, 2013

- Audit Trail Values Available in Summary Reports
- Auto-Create Bookings for Generic Resources
- Bulk Delete Action Respects Booking Rules
- Disable New, Multiple Bookings Option
- Enable a Booking Type to Exist in All Approval Statuses
- Enable Booking Approval Status in Reports
- Enable Bookings to be Auto-Approved

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- Resource Profile Type Access Control
- Show Project Assignment Profiles on Task Assignments
- Time Entries Match Task Assignments

August 17, 2013

- Script Support for Web Service API Methods

March 16, 2013

- Automated Search Engine for Booking Creation
- Project Assignment Profiles
- Resource Booking Approvals
- User-Level Outline View

September 15, 2012

- Additional Functionality for Expense Policies on Per-Project Basis
- Display a Zero Sum Tax Rate and Amount on Invoices
- Quick Audit Trail for Custom Fields

June 15, 2012

- One Project Per Expense Report

May 12, 2012

- Select Different Currencies for Loaded Cost Overrides

March 17, 2012

- Adjust Planned and Assigned Hours Based on Actual Work
- Apply Phase Filtering in Time Billing Rules
- User Scripting — Form Scripts
- Prevent Invoicing and Revenue Recognition on a Per-Project Basis

January 21, 2012

- Automatically Add New Users to Assignment Groups
- Conditional Dropdown Custom Fields

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- Portfolio Projects and Subordinate Projects
- New "Booking Type" Filter in Revenue Recognition Rule

November 19, 2011

- Advanced Agreement and Customer PO Balance Calculation

September 17, 2011

- Configure Time Entry Rounding at the User Level
- Enhanced Workflow Process Invoice Submission and Revenue Container Creation

July 16, 2011

- Credit and Rebill Functionality for Invoices

January 28, 2011

- Custom Email Notifications

January 22, 2011

- Additional Option for Invoice Layout Terminology Overrides

September 18, 2010

- Define Charges to Recognize in "As Billed" Revenue Recognition Rules
- Exclude Specific Values from Filters in Reports
- Multiple Schedule Exceptions Per Day by Time Off Requests
- Organize Saved Reports in Specified Folder

July 17, 2010

- Allow an Approver to Edit a Submitted Invoice
- Optionally View and Assign Revenue Hours for Recognition Transactions

May 21, 2010

- View Tasks for Inactive Projects in Task List

May 15, 2010

- Proxy Confirmations

January 23, 2010

- Automatically Receive PDF Attachments of Approved Timesheets and Expense upon Approval
- Self-Rejection of Timesheets

November 21, 2009

- Report on More than 31 Days When Reporting on Daily Time Periods

September 19, 2009

- Single Sign-On Integration Leveraging SAML

July 18, 2009

- Accounting Period Functionality
- Assign Project Job Codes for Users on a Per Project Basis

June 9, 2009

- NetSuite Integration

May 16, 2009

- Restrict Specific Custom Fields from Being Copied

March 21, 2009

- Display Contacts in "Last Name, First Name" Format in Drop-down Menus

January 17, 2009

- Line Item Rejection in Timesheets
- Project Hierarchy Settings in User Detail Report

November 22, 2008

- **Active Directory Integration** (Removed October 10, 2020)

September 13, 2008

- Pick List Custom Field
- Default Options on Task Assignment
- Prevent Entry of Future Time at the User Level
- Time Entry Grid Filtering

August 7, 2008

- User-Defined Reporting Currencies

July 19, 2008

- Use Booking Request Grid to Enter Multiple Requests That Are Available

May 17, 2008

- Email Scheduled Reports to a Contact from the Contacts List
- Foreign Currency Receipts in Expense Grid
- Suppress Email Notifications or Add Addresses to Notifications

December 10, 2007

- Overlapping Timesheets and Envelopes at the Role Level

September 13, 2007

- Allocation Grid Custom Field

August 31, 2007

- Hide Divider Sections on Forms

April 2, 2007

- Edit Exchange Cross Rates

August 24, 2006

- Set the Timesheet Duration At the User Level

June 15, 2005

- Unexport Records from a Specific Application by UI

August 26, 2004

- Calculate Remaining Hours Using Approved Hours Instead of Worked Hours

October 20, 2003

- Use Zero Hours Rather than Planned Hours for Users' "Hours Remaining" Estimates

February 12, 2003

- Filter Timesheet Report by Project

August 12, 2002

- Use Days Instead of Hours for All Time Entries

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